AvePoint Office Connect 1.6

User Guide

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What’s New in this Guide

- Support using Office Connect functionalities with Office 365 Group.
- Support scanning Office 365 Group, and saving the scanned groups and displaying them under **Office 365 Group** node on the tree view.
- Support connecting to the Office Connect Online Manager.
- Support using Office Connect functionalities within Adobe Acrobat DC and Adobe Reader.
- Support minimizing the tree view in the Office Connect interface.
- Added the embedded Office Connect explorer into Outlook.
- Support adding any node at any level (from site collection down to item level) on the tree view as a favorite node.
- Support using the **Shift** and **Ctrl** keys in object selections, and using **F2** for the Rename function and **Delete** for the Delete function.
- Support directly downloading objects and copying URL of objects in a node within the Office Connect interface.
- Updated the required permission for Quick Share.
- Added the [Manager Connection](#) section.
- Support inserting the SharePoint link of a library into an e-mail.
About Office Connect

AvePoint Office Connect is a platform that enables users to share and manage content through the Office Connect Interface. Office Connect enables you to perform actions on the following types of objects:

- **Windows File Explorer** – Allows you to share files in Windows File Explorer, and upload them to SharePoint.

- **Microsoft Office and Adobe Acrobat** – Allows you to share Microsoft Office files (including Microsoft Word Documents, Microsoft Excel Worksheets, and Microsoft PowerPoint Presentations) and Adobe Acrobat documents with other users from within the files themselves, and save the files (both existing files and new files) to SharePoint.

- **Microsoft Outlook** – Allows you to insert SharePoint or Secure Share links of libraries, folders, and files into your e-mails, insert SharePoint files as attachments into your e-mails, copy attachments from your e-mails to SharePoint, store your e-mails (including delivery and read receipts) to SharePoint, and manage your favorite content from Outlook.

Office Connect functionality supports:

- Adobe Acrobat DC and Adobe Reader X and above

Office Connect also enables internal users to share files and e-mail attachments with external users. Internal users are users in domains configured by your SharePoint administrator. External users are users that are not in any of the configured domains. The Office Connect Manager can be configured to allow sharing of files and e-mail attachments with external users through integration with AvePoint Perimeter. For more information on sharing files or e-mail attachments with external users using AvePoint Perimeter/AvePoint Perimeter Online, see the AvePoint Perimeter Pro Secured Share User Guide/AvePoint Perimeter Online User Guide.

*Note: If the integrated AvePoint Perimeter is in version 1.7 or earlier, make sure the internal user who shares objects with external users using the Quick Share functionality has been added as a Perimeter internal user. For more information on adding an AD user as the Perimeter internal user, refer to the Synchronizing Active Directory Users section of the AvePoint Perimeter Administrator Guide.*
Office Connect Quick Start

Classifying and Archiving Data into SharePoint and Office 365

When you are working with multiple applications to classify and archive data, Office Connect enables you to merge content from Microsoft Outlook, Microsoft Office, Adobe Acrobat, and Windows File Explorer effortlessly into SharePoint and Office 365. Content, e-mails, and attachments can be added to SharePoint and SharePoint Online in bulk with a few clicks.

1. Add the connection to a SharePoint/SharePoint Online site.
   *Note: This is a preparation only required for the first upload. Once added, the site, together with libraries and folders under it, will always be available for further uploads unless you manually delete it.
   - Add a connection manually.
     - Add a connection within the Office Connect interface. For details, refer to Managing SharePoint Connections.
     - Add a connection within Microsoft Outlook. For details, refer to SharePoint Connections.
   - Add connections in bulk. For details, refer to Site Collection Scan.

2. Upload objects to SharePoint.
   - To upload documents from Windows File Explorer, right-click the documents and select Move to SharePoint or Copy to SharePoint from the drop-down menu.
   - To upload e-mails from your Outlook, right-click the e-mails and select Move to SharePoint or Copy to SharePoint from the drop-down menu.
   - To upload e-mail attachments from your Outlook, right-click the e-mails and select Manage Attachments > Copy Attachments to SharePoint/Move Attachments to SharePoint from the drop-down menu.
     *Note: If the corresponding pop-up setting is configured, you can just click Yes in the pop-up message after attaching a file to the e-mail.
   - To upload a Microsoft Office file or Adobe Acrobat document within the file, click Save to SharePoint on the ribbon of the file.
   - Drag documents and drop them to a library or folder under the SharePoint Connections node in the Office Connect interface.
   - Drag e-mails and drop them to a node under the SharePoint Favorites node in Outlook.
   For details, refer to Uploading Objects to SharePoint via Office Connect.
3. Office Connect also allows you to add a library or folder that you frequently use within the site to your favorites list. Once added to your favorite list, you can upload objects directly to the favorite node without having to expand the site to locate it.

For details, refer to Manage Favorites.

Sharing Content from Your Personal Inbox or Desktop

You can share enterprise content with other colleagues from your personal inbox or desktop using the Office Connect Quick Share feature. Quick Share uploads documents to a SharePoint or Office 365 site, allows you to assign different permissions to the documents for your colleagues, and sends e-mail notifications about the share, all with a single click.

1. Perform the quick share.
   - To share files from Windows File Explorer, right-click the files and select **Quick Share** from the drop-down menu.
   - To share attachments of a new e-mail from Microsoft Outlook, click **Quick Share** on the ribbon of the e-mail.
   - To share a Microsoft Office file or Adobe Acrobat document within itself, click **Quick Share** on the ribbon of the file.

For detailed information on the Quick Share, refer to **Sharing Files with Others (Quick Share)**.

2. Manage Quick Share locations. (optional)

Office Connect provides a default Quick Share location, which is a library in your My Site defined by your administrator during the Office Connect installation. Objects you shared will be automatically uploaded to that library.

Office Connect also allows you to configure your own Quick Share locations. Once saved, you can select one to use directly during the Quick Share without having to repeatedly configure locations or upload objects to SharePoint.

For detailed information on managing Quick Share locations, refer to the **Managing Quick Share Locations** section of this guide.
Understanding the Office Connect Main Interface

The Office Connect main interface can be opened by double-clicking the Office Connect (快捷方式) shortcut on the desktop. In the welcome page of the interface, you can see the introductions and sample images on key features of Office Connect on the right pane.

![Office Connect welcome page](image)

**Figure 1: Office Connect welcome page.**

Click the next ( ) button next to the sample image to go to the next page, or click the previous ( ) button to go to the previous page. You can also click a dot in the bottom menu (•••) of the right pane to go to that page directly, or move your mouse back and forth over the dots for page turning.

Above the Office Connect tree, you can see a Filter text box which you can use to narrow down the nodes that are displayed on the tree. To the right of the text box, the Minimize the tree view ( ) button is available to minimize the tree view and only display the right viewing pane. Then, the Expand the tree view ( ) button is clickable to expand the tree view on the interface.

The following table illustrates each node icon on the tree of the **Office Connect** interface:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>★</td>
<td>The <strong>Favorites</strong> node.</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td><img src="image" alt="Recent Location" /></td>
<td>The <strong>Recent Location</strong> node.</td>
</tr>
<tr>
<td><img src="image" alt="SharePoint Connections" /></td>
<td>The <strong>SharePoint Connections</strong> node.</td>
</tr>
<tr>
<td><img src="image" alt="Site Collection" /></td>
<td>A SharePoint site collection.</td>
</tr>
<tr>
<td><img src="image" alt="Site" /></td>
<td>A SharePoint site.</td>
</tr>
<tr>
<td><img src="image" alt="List" /></td>
<td>A SharePoint list.</td>
</tr>
<tr>
<td><img src="image" alt="Library" /></td>
<td>A SharePoint library.</td>
</tr>
<tr>
<td><img src="image" alt="Folder" /></td>
<td>A SharePoint folder.</td>
</tr>
<tr>
<td><img src="image" alt="Favorites" /></td>
<td>Folder created under <strong>Favorites</strong> in the <strong>Office Connect</strong> interface.</td>
</tr>
<tr>
<td><img src="image" alt="Office 365 Groups" /></td>
<td>The <strong>Office 365 Groups</strong> node.</td>
</tr>
<tr>
<td><img src="image" alt="Folder" /></td>
<td>An Office 365 group.</td>
</tr>
</tbody>
</table>

*Note*: A (ителей) icon will be added in addition to the icon of the SharePoint Online nodes, including SharePoint connections, libraries, lists, and folders.

*Note*: The **Office 365 Groups** node will only appear when you have scanned and saved Office 365 groups using the **Site Collection Scan** feature. For more information, refer to [Site Collection Scan](#).

*Note*: When Office Connect is connected to the Office Connect Online Manager, a message will appear on the top of the Office Connect interface when a new version of Office Connect is available. You can click the **Download** link to the right of the message to download the new version directly.
Using Office Connect

The following actions can be performed via Office Connect.

Managing SharePoint Connections

On the left pane of the Office Connect interface, you can find the SharePoint Connections node. SharePoint Connections are connections to site collections and sites to which you have access – including your My Site.

Once a connection to a site collection or site is established, you can define your favorite filing locations and also quickly browse and manage your documents in the locations.

In the SharePoint Connections node, all of the site collections and sites to which the connections you have added are listed. The OneDrive for Business (On-Premises) and/or OneDrive for Business (Online) are default connections that will be displayed based on the configuration of your administrator.

To add a connection, right-click the SharePoint Connections node, and select the Add Connection option from the drop-down menu. The Add Connection pop-up window appears.

*Note: Only site collections and sites can be added as connections.

![Add Connection pop-up window.](image)

Enter the URL of the site collection/site that you want to add in the Site URL text box. Select an existing account to connect the site collection/site, or select New Credentials to use another account that has at least Read permission to the site collection/site. Enter the username and password in the corresponding text boxes. You can also click the edit (✏️) button next to an account to enter the new password of the account.

*Note: The password of the current login account cannot be edited here.
To delete a connection, right-click the connection, and select the **Delete** option from the drop-down menu. The connection will be deleted from the **SharePoint Connections** node.

**Managing the Favorites List**

On the left pane of the **Office Connect** interface, you can find the **Favorites** node. All objects that you have added to your favorites list are listed under this node, including custom folders created directly under the **Favorites** node.

**Exporting and Importing Favorites**

The favorites list is specific to each user. If you move to a new device (workstation), you can use the export and import functionality to transfer your favorites list to your new device. You can also add objects to your favorites list in bulk by modifying the exported .txt file.

To export your favorites list, follow the steps below:

1. Right-click the **Favorites** node, and then select the **Export Favorites** option from the drop-down menu.
2. In the **Save As** pop-up window, select a desired location to store the exported .txt file, and then click **Save**.
3. The .txt file will be exported to the selected location. The default name of the file is in the following format: **Favorites(DateTime).txt**.

To import the exported .txt file back into the **Favorites** node on a different device, follow the steps below:

1. Right-click the **Favorites** node, and select the **Import Favorites** option from the drop-down menu.
2. In the **Open** pop-up window, select the exported .txt file, and then click **Open**.
3. The structure and information in the .txt file will be imported to the **Favorites** node.

**Adding a Favorite**

To add an object to your favorites list, right-click the **Favorites** node and select the **Add a Favorite** option from the drop-down menu. The **Add a Favorite** pop-up window appears. Enter the URL of the object you want to add to your favorites list in the Object URL text box. Select an existing account that has the permission to access the object, or select **New Credentials** to use another account by entering the username and password in the corresponding text boxes. You can also click the edit ( Modiﬁcation Stamp ) button next to an account to enter the new password of the account.

You can also right-click a node under **Recent Location**, **SharePoint Connections**, or **Office 365 Groups**, and select **Add to Favorites** to add the node to your favorites list. The **Add to Favorites** window appears. In the window, select the destination where you want to add the node in your favorite list.
• Click **Save** to add the node directly to your favorite list.

• Click the right arrow (▶) button to the left of **Favorites**, click a folder, and then click **Save** to add the node to this folder in your favorite list.

• Right-click **Favorites** or a folder under Favorites, and select **New Folder** from the drop-down list. Enter a name for the folder and press **Enter** on the keyboard. Click this folder and click **Save** to add the node to the new folder you created.

*Note: Only the folders created under **Favorites** can be loaded in the **Add to Favorites** window.

### Renaming Favorites Nodes

Existing nodes under **Favorites** can be renamed. To rename an existing node, follow the steps below:

1. Right-click a node and select the **Rename** option from the drop-down menu.
2. Modify the name as desired, and then press **Enter** to save the new name.

### Removing Favorites Nodes

Existing nodes under **Favorites** can be removed.

Right-click a node and select the **Delete** option from the drop-down menu. The node will be removed from **Favorites**.

### Searching for Sites or Lists

In the **Office Connect** interface, the Search functionality is available for all site collections and sites.

1. Right-click a site collection or site under the **Favorites** or **SharePoint Connections** node, and select the **Search** option from the drop-down menu. The **Search** pop-up window appears.
2. Enter keywords in the text box, and click **Search** to search for sites or lists. The matching sites or lists are listed in the main text box.

3. After clicking a site or list, and clicking **Add to Favorites**, you can add the site or list to your favorites list. You can also right-click a site or list, and select the **Add to Favorites** option from the drop-down menu.

4. Click **Close** to close this window.

**Managing Nodes on the Tree**

On the left pane of the **Office Connect** interface, you can find the **Favorites**, **Recent Location**, **SharePoint Connections**, and **Office 365 Groups** (if configured) nodes. **Favorites** lists all objects in your favorites list. Locations (SharePoint libraries, lists, and folders) used to upload objects within Office Connect recently will be listed under **Recent Location**. By default, 10 locations will be listed. All SharePoint connections are listed under **SharePoint Connections**. Clicking a connection allows you to load all sites, libraries, and lists under it. **Office 365 Groups** lists all of the Office 365 groups you have saved.
Opening a Node in a Browser

Right-click an object under Favorites/Recent Location/SharePoint Connections/Office 365 Groups, and select the Open in Browser option from the drop-down menu. The object in SharePoint or Office 365 will be opened in your system’s default browser.

*Note: Open in Browser is not available for custom folders created under Favorites.

Copying URL

Right-click an object under Favorites/Recent Location/SharePoint Connections/Office 365 Groups, and select the Copy URL option from the drop-down list. Pasting the copied URL in a browser allows you to access the node in SharePoint or Office 365.

*Note: Copy URL is not available for custom folders created under Favorites.

Refreshing a Node

Right-click a node under Favorites/Recent Location/SharePoint Connections/Office 365 Groups, and select the Refresh option from the drop-down menu. The node will be loaded again.

Creating a New Folder

Right-click a library, list, or folder under Favorites/Recent Location/SharePoint Connections or right-click a group under Office 365 Groups, and select the New Folder option from the drop-down menu. The New Folder pop-up window appears. Enter a name for the folder and click Save to create the folder under the current node.

Managing Content in a Node

After you click a library, list, or folder in the left pane of the interface, columns in the default view of the library, list, or the library where the folder resides will be displayed on the right pane. Folders/files/items in the selected node will be displayed with the column values. After you click a site collection or site in the left pane of the interface, libraries and lists in the site collection or site will be displayed on the right pane. After you click an Office 365 group on the left pane of the interface, columns in the default view of the group library will be displayed on the right pane together with folders and files in the library.

On the top of the right pane, you can see the location of the currently selected node. Hover your mouse over the node or the Open in Browser icon, you can see the full URL of the node. Clicking the node or the Open in Browser icon allows you to open the node in SharePoint or Office 365 with your default browser. Clicking a link in the location path allows you to switch to that node within Office Connect.

*Note: AvePoint Office Connect supports using the Ctrl and Shift keys on the keyboard in object selection.
Refer to the following table on the supported status of each action for libraries, lists, folders, files, and items.

<table>
<thead>
<tr>
<th>Action</th>
<th>Object</th>
<th>Document</th>
<th>Item</th>
<th>Folder</th>
<th>Library</th>
<th>List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Filter</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>Refresh</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>Rename</td>
<td>√</td>
<td></td>
<td>√</td>
<td></td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>Copy</td>
<td>√</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Move</td>
<td>√</td>
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<td></td>
<td></td>
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<tr>
<td>Preview</td>
<td>√</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quick Share</td>
<td>√</td>
<td></td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Download</td>
<td>√</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copy URL</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td>√</td>
</tr>
</tbody>
</table>

Refer to the following table on the supported status of each action for folders and documents under Office 365 groups.

<table>
<thead>
<tr>
<th>Action</th>
<th>Object</th>
<th>Document</th>
<th>Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>√</td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>Edit</td>
<td>√</td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>Delete</td>
<td>√</td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>Filter</td>
<td>√</td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>Refresh</td>
<td>√</td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>Rename</td>
<td>√</td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>Copy</td>
<td>√</td>
<td></td>
<td></td>
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<tr>
<td>Move</td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preview</td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quick Share</td>
<td>√</td>
<td></td>
<td>√</td>
</tr>
</tbody>
</table>
Creating Content

In Office Connect, you can directly create folders and/or files in a library, and create folders and/or items in a list without having to log into SharePoint.

- Click **New** on the ribbon and select a content type or the **Folder** option from the drop-down menu to create a new file or folder in the library.

  *Note:* All content types whose parent or parent’s parent is **Document** together with the **Document** content type in the selected library or the library where the selected folder is located will be displayed in the drop-down menu.

  - If you select **Folder**, enter a desired name in the Name text box, and then click **Save**.
  - If you select **Document**, Microsoft Word will be opened by default. Enter the desired content, and then click the save (✓) icon. In the **Save As** page, click **Browse** to browse a storage location for the file, enter a desired name for the document, and then click **Save**.

  *Note:* The default document template of the selected content type will be opened. To change the document template for the selected content type, go to the SharePoint library or the library where the selected folder is located, click the corresponding content type, and then change the document template in the **Advanced Settings** page.

- Click **New** on the ribbon and select the **Item** option to create a new item in the list selected on the left pane. Enter column values in the text boxes and click the **Upload Attachment** link to upload attachments for the item.

Renaming Objects

To rename a file or folder, access the **Rename** pop-up window using one of the following methods:

- Select the file or folder, click the Show More (*** ) button and select **Rename** from the drop-down list.
- Right-click the file or folder, and select **Rename** from the drop-down list.
- Select the file or folder, press **F2** on the keyboard.
In the Rename window, enter a desired name in the Name text box, and click Save to save the new name.

**Editing Objects**

Folders, files, and items can be edited in Office Connect.

To edit an object, select it and click Edit on the ribbon, or right-click it and select Edit from the drop-down list. All properties of the object are list. After editing the properties, click Save to save the changes.

*Note: When editing an item, you can remove the existing attachments of the item or add new attachments by clicking the Upload Attachment link.

**Copying Files**

To copy files, select one or more existing files, click the Show More (*** ) button and select Copy from the drop-down menu. The Copy File pop-up window appears. Select a destination on the tree node and click OK. Select the Overwrite existing files checkbox to copy the selected files and overwrite existing files in the destination. The Copy File window can also be opened by selecting one or multiple files, right-clicking them, and selecting Copy from the drop-down list.

You can also use the Search functionality to search the desired destination node. All libraries and folders can be selected as the destination except for the original location.

**Moving Files**

To move files, select one or more existing files, click the Show More (*** ) button and select Move from the drop-down menu. The Move File pop-up window appears. Select a destination on the tree node and click OK. Select the Overwrite existing files checkbox to move the selected files and overwrite existing files in the destination. After being moved, the files will be removed from the original location. The Move File window can also be opened by selecting one or multiple files, right-clicking them, and selecting Move from the drop-down list.

You can also use the Search functionality to search the desired destination node. All libraries and folders can be selected as the destination except for the original location.

To move a file, you can drag the file and drop it directly to an expanded library or folder on the tree.

**Deleting Objects**

To delete objects, select one or more existing objects, and click Delete on the ribbon or press Delete on the keyboard. The selected objects will be removed from the current node. You can also select one or multiple objects, right-click them, and select Delete from the drop-down list to delete the objects.
Refreshing Content
Clicking Refresh on the ribbon allows you to refresh the content in the current node.

Filtering Objects
Clicking Filter on the ribbon allows you to filter the displayed folders, files, or items. Select a column that you want to use to filter folders, files, or items, and select the filter options by selecting the corresponding checkboxes, and then click OK.

Previewing File Content
Clicking the Show More (•••) button on the ribbon and select Preview from the drop-down menu allow you to display the preview area. Select the row of the file that you want to preview, the preview content will be displayed in the preview area.

Sharing Objects
SharePoint On-premises and SharePoint Online libraries, folders, and files can be shared. Select one or more libraries, folders and/or files you want to share, click the Show More (•••) button on the ribbon and select Quick Share from the drop-down menu. The Quick Share interface appears. The Quick Share interface can also be opened by selecting one or multiple objects, right-clicking them, and selecting Quick Share from the drop-down list.

*Note: If the node you select on the left pane of the Office Connect interface is a list, the Quick Share button will be clickable only when you select a folder.

- **Share** – The objects you selected to share with other users will be attached in this field.
- **Invite People** – Specify the users with whom you want to share the objects by entering their user names or e-mail addresses in the text boxes.
  - **Can Edit** – Users will have the Contribute permission to the shared objects.
  - **Can View** – Users will have the Read permission to the shared objects.
- **Can Edit** – Users will have the Contribute permission to the shared objects.
- **Can View** – Users will have the Read permission to the shared objects.
- The text entered in the main text box will be the content of the e-mail notification sent to the users with whom the objects are shared. For more information on the e-mail notification, refer to Quick Share E-mail Notifications.
- Click the SHOW OPTIONS link to unfold the following checkbox:
  - **Send an e-mail invitation** – Select this checkbox to send an e-mail invitation to the users with whom you want to share the objects.

*Note: Only when this checkbox is selected can you enter content in the main text box. However, if you select a SharePoint Online file to share with external users, an e-mail notification will be sent anyway.
Once clicked, the link will change to **HIDE OPTIONS**. Click the **HIDE OPTIONS** link to hide the checkbox above.

- Click **Edit E-mail Account** to change the credentials saved for sending the Quick Share e-mail notification.

Click **Share** to share the objects.

Clicking the name link of a Microsoft Office file and clicking **Quick Share** on the ribbon after opening the file also allows you to share the file with other users.

**Downloading Objects**

Select one or multiple folders and/or files, click **Download** on the ribbon. The **Browse For Folder** pop-up window appears. Select a storage location for the downloaded objects, and click **OK**. You can also click **Make New Folder** to create a new folder to store the downloaded objects.

The download action can also be performed by selecting one or multiple folders and files, right-clicking them, and selecting **Download** from the drop-down list.

**Copying URL**

Select a list, library, folder, file, or item, click the **Show More (*** )** button on the ribbon and select **Copy URL** from the drop-down menu. The URL of the list, library, folder, file, or item is copied and can be pasted in a browser to directly open it in SharePoint or Office 365. You can also perform the copy URL action by right-clicking a list, library, folder, file, or item and select **Copy URL** from the drop-down list.

**Changing the View**

When you click a library, list, group, or folder on the left pane of the interface to view content in the selected node, the default view of the library or list will be used to display the content properties. To change the view, select a view from the View drop-down menu on the ribbon. All views in the list, library, or the library where the selected folder resides are listed as options in the View drop-down menu.

**Sorting Objects**

By default, files are sorted by **Name** in ascending alphabetical order. Click the **Name** column to use the descending alphabetical order. Click another column to change the sort order: in ascending order or descending order.

By default, items are sorted by **Title** in ascending alphabetical order. Click the **Title** column to use the descending alphabetical order.
Searching Objects

To search specific folders, files, or items, enter the keywords in the Search text box on the upper-right corner of the interface, and click the magnifying glass (🔍) button to perform the search. Folders and files in the current node can be searched by names, and items can be searched by titles.

Opening the User Guide

Click the User Guide (🔍) button on the lower-left corner of the Office Connect main interface to open the AvePoint Office Connect User Guide in the Office Connect installation package.
Uploading Objects to SharePoint via Office Connect

The Office Connect “triggered” interface allows you to edit the name and title of the objects, select a destination content type for the objects, and configure column values on the content type for the objects during the upload to SharePoint.

![Office Connect triggered interface.](image)

**Figure 4: Office Connect triggered interface.**

1. Open the interface by one of the following methods:

   - **Windows File Explorer**: Right-click one or more files/folders in Windows File Explorer, and then select the **Copy to SharePoint** or **Move to SharePoint** option from the drop-down menu.

   - **Microsoft Office**: In an Office file (Microsoft Word Document, Microsoft Excel Worksheet, or Microsoft PowerPoint Presentation), click **Save to SharePoint** or **Save to SharePoint as PDF** in the **Office Connect** group on the ribbon.

   - **Adobe Acrobat DC/Adobe Reader**: Open or create a PDF file with Adobe Acrobat DC/Adobe Reader, and click **Save to SharePoint** in the **Office Connect** tab.

   - **Outlook**: In Outlook, you can access the **Office Connect** interface in the following ways:

     - In a new e-mail, click **Save Attachments to SharePoint** on the ribbon after attaching files to the e-mail.
o In a new e-mail, click **Send and File** on the ribbon. After the e-mail is successfully sent, the interface will appear.

o In an existing e-mail, click **Copy to SharePoint** in the **Office Connect** group on the ribbon.

o In an existing e-mail that has attachments, right-click the attachments and select **Copy Attachments to SharePoint** or **Move Attachments to SharePoint** option from the drop-down menu, or click **Copy Attachments to SharePoint** or **Move Attachments to SharePoint** in the **Office Connect** group on the ribbon.

o Select one or more e-mails, and then click **Manage Attachments** in the **Office Connect** group on the ribbon and select **Copy Attachments to SharePoint** or **Move Attachments to SharePoint** from the drop-down list, or click **Copy to SharePoint** or **Move to SharePoint** on the ribbon.

o Select one or more e-mails, right-click the e-mails, and then select the **Copy to SharePoint** or **Move to SharePoint** option from the drop-down menu, or select the **Manage Attachments** option from the drop-down menu and click **Copy Attachments to SharePoint** or **Move Attachments to SharePoint**.

o Click **Yes** in the pop-up message after sending an e-mail.

o Click **Yes** in the pop-up message after attaching a file to an e-mail.

  *Note*: The last two situations are only available when the corresponding pop-up settings are configured. For more information, refer to **Pop-up Settings**.

2. In the **Office Connect** interface, select a SharePoint library, list, or folder as the destination where you want to save or move the objects.

  *Note*: You can only click **Next/Upload** when a valid destination is selected.

3. In the right pane of the interface, there are four columns that show detailed information on each object:

   - **Name** – The name of the file or the subject of the e-mail you selected to upload to SharePoint, which can be edited after you select a valid destination.

   - **Title** – The title of the file or the full name of the e-mail you selected to upload to SharePoint, which can be edited after you select a valid destination.

   - **Status** – After you select a valid destination, the status of the object is checked and displayed in the **Status** column. Hover your mouse over the status icon, and you can see the details on the status.

  *Note*: There is no tooltip displayed when you hover over the Successful status (✔️).
Refer to the following table of statuses.

<table>
<thead>
<tr>
<th>Status</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Successful</td>
<td>✔</td>
<td>The object can be uploaded to SharePoint successfully.</td>
</tr>
<tr>
<td>Warning</td>
<td>🚸</td>
<td>The file name contains illegal characters which have been automatically replaced by SharePoint.</td>
</tr>
<tr>
<td>Duplicated</td>
<td>⚠</td>
<td>A file with the same name has already been selected to be uploaded.</td>
</tr>
<tr>
<td>Failed</td>
<td>🚸</td>
<td>This file type is blocked and cannot be uploaded, or the file size is larger than the maximum upload size and cannot be uploaded.</td>
</tr>
</tbody>
</table>

*Note: When the file status is Failed, the Next/Upload button is grayed out and not clickable.

- **Action** – Click the Remove (🗑️) button to remove the object from the Office Connect interface and cancel saving the object to SharePoint.

4. You can edit the **Name** and **Title** of an object by clicking the corresponding Edit (✍️) icon.

5. Click **Upload** to upload the selected objects, and then go to step 11 directly.

6. You can also select the **Edit Property** checkbox, the **Upload** button on the lower-right corner will be changed to **Next**.

   *Note: By default this checkbox is deselected in the Office Connect “triggered” interface. After the first time access, the selection of this checkbox will be recorded and automatically selected next time.

7. If the selected destination is a SharePoint list, follow the steps below:
   a. The **Create items separately** checkbox is available when multiple objects are selected to save or move to the list.
      - Select this checkbox to create an item for each object in the list.
      - Deselect this checkbox to create an item for all objects in the list.
   b. Click **Next** to access the **Edit item properties** page.
   c. If the **Create items separately** checkbox is selected, the **Edit item properties separately** checkbox will be available in the **Edit item properties** page. Select the **Edit item properties separately** checkbox to edit properties of each item separately. If this checkbox is deselected, the property changes will be made to all of the items.
   d. Select a destination content type for the items if there is more than one content type in the destination. All content types whose parent or parent’s parent is **Item** in the list will be listed in the Content Type drop-down menu.
*Note: When uploading e-mails to SharePoint, the content type named AvePoint_Content Type may be available based on the configurations set by your administrator. The columns on this content type match metadata of e-mails.

e. All editable columns on the content type will be listed below. Configure column values for the item.

*Note: By default, the item title will be the same as the object for which this item is automatically created.

*Note: Office Connect also supports editing the External Data type of columns.

f. Go to step 9 directly.

8. If the selected destination is a SharePoint library or folder, follow the steps below:

a. Click Next to access the Edit File Properties page.

b. Selecting the Edit file properties separately checkbox allows you to edit the properties of each object separately. If this checkbox is deselected, the property changes will be made to all of these objects.

*Note: The document property value will be automatically filled in as the column value in the Edit File Properties page when the document property and SharePoint column share the same name and their types match.

c. Depending upon the settings of the selected destination, one of the following two options will display:

   o If versioning settings are enabled in the destination library or the library where the destination folder resides, you can select the Add as a new version to existing files checkbox to add an object you are uploading as a new version of an object with the same name.

   o If versioning settings are not enabled in the destination library or the library where the destination folder resides, you can select the Overwrite existing files checkbox to overwrite objects in the destination with the objects you are uploading.

d. Select a destination content type for the objects if there is more than one content type in the destination. All content types whose parent or parent’s parent is Document in the library will be listed in the Content Type drop-down menu.

*Note: When uploading e-mails to SharePoint, the content type named AvePoint_Content Type may be available based on the configurations set by your administrator. The columns on this content type match metadata of e-mails.

e. All editable columns on the content type will be listed below. Configure column values for the objects.
*Note: Office Connect also supports editing the External Data type of columns.

9. When assigning property values, you can set a value as the property’s default value. Also, you can cancel the default value of a property.

![Figure 5: The Set as Default option.](image)

- Click … in the same row as the property, and then select the Set as Default option from the drop-down menu. The edited property value will be set as the default value of this property in the current node. The property value will be automatically filled in the text box for the future objects uploaded to this node.

- Click … in the same row as the property, and then select the Reset option from the drop-down menu. The default property value will be canceled.

10. Click **Upload** to upload the selected objects or click **Back** to return to the previous page.
11. In the upload status page, you can see the upload status of the objects and other information.

Figure 6: The upload status page.

a. The location shows where you uploaded the object. You can click the exact location to open the corresponding SharePoint node in your system’s default browser.

b. The message on the upload action.

c. The progress on the upload action, the progress bar, and the upload results.

d. The ribbon shows available actions and settings.

   o **Retry** – Retry the upload action for the selected objects. This action is only available for the objects or items that have the **Failed**, **Cancelled**, or **Successful** status.

   o **Pause** – Pause the upload action for all objects or items that have the **Waiting** status.

   o **Resume** – Resume the upload action.

   o **Cancel** – Cancel the upload action for the selected objects or items that have the **Waiting** status.

   o **Add as a new version to existing files/Overwrite existing files** – If this checkbox is selected in the **Edit File Properties** page, the selection will be kept in this
page. If it is not selected in that page, you can select it before performing the retry action.

*Note: This is only available when you select a library to store objects.

e. The conflicting setting you selected when editing the object properties. If you upload an object without editing the properties, the default conflicting setting will be displayed here.

- If versioning settings are enabled in the destination library or the library where the destination folder resides, the Add as a new version to existing files checkbox will be displayed.
- If versioning settings are not enabled in the destination library or the library where the destination folder resides, the Overwrite existing files checkbox will be displayed.

You can edit the setting by selecting/deselecting the corresponding checkbox.

f. On the main panel, you can view the objects you selected to upload to SharePoint or the items you configured to create for the objects. The four columns in this panel display the following information on the objects or items:

- **Name/Title** – The name of the object, or the title of the item where the objects are attached.
- **Hyperlink** – The full URL of the object in SharePoint.
- **Finish Time** – The time at which the object upload action was completed.
  
  *Note: The Finish Time does not exclusively refer to the time that an object was successfully uploaded, but rather the time the upload action was completed. The Finish Time can refer to an upload action that failed.

- **Status** – The status of the upload action.
- **Comment** – If the object failed to be uploaded or the item where the object will be attached failed to be created, the reason of the failure will be displayed as the Comment column value.

**Dragging and Dropping Objects**

Dragging objects from the Windows File Explorer or Outlook and dropping them into the Office Connect interface allows you to upload the objects to SharePoint without any clicks.

- Drag and drop within the interface
  
  - Drag site collection/site/library/list/folder on the tree and drop it to **Favorites** or a custom folder under **Favorites**.
Drag a folder or file from the right panel and drop it to a library or folder on the tree.

Drag objects from Windows File Explorer and drop them into the Office Connect interface

Drag a folder or file from the Windows File Explorer and drop it to a library/list/folder on the tree.

Drag a folder or file from the Windows File Explorer and drop it to the viewing pane of a library/list/folder

Drag objects and drop them into the Office Connect interface embedded in Outlook

Drag a folder or file from the Windows File Explorer and drop it to a library/list/folder on the tree of the Office Connect interface embedded in Outlook

Drag a folder or file from the Windows File Explorer and drop it to the viewing pane of a library/list/folder on the Office Connect embedded in Outlook

Drag e-mails in Outlook and drop them to a library/list/folder on the tree of the Office Connect embedded in Outlook

Drag e-mails in Outlook and drop them to the viewing pane of a library/list/folder of the Office Connect embedded in Outlook

Drag e-mails and drop them to the Office Connect section in Outlook

Drag e-mails in Outlook and drop them to the SharePoint Favorites node or a node under it in Outlook.

*Note: When the library/list where you drop objects has required columns, and you choose to upload them directly without editing the object properties, a warning message will appear. Click Yes to upload the objects directly to the library/list without editing their properties, and Check Out the objects in the library/list, or click No to manually assign column values for the objects before uploading them to the library/list.

Locating Uploaded E-mails in SharePoint via Outlook

For e-mails that have been uploaded to SharePoint, the Show SharePoint Locations option is selectable from the drop-down menu:

- Manage Attachments
- Copy to SharePoint
- Move to SharePoint
- Show SharePoint Locations

Figure 7: The Show SharePoint Locations option in Outlook.
You can use the **Show SharePoint Location** action to find e-mails that have been uploaded to SharePoint. Right-click the e-mail, and select the **Show SharePoint Location** option from the drop-down menu. The **Office Connect** pop-up window appears.

![Office Connect pop-up window](image)

**Figure 8: The Show SharePoint Locations pop-up window.**

There are two areas in the **Office Connect** pop-up window:

a. This area lists all copies of the e-mail that have been successfully uploaded to SharePoint. The URLs display the upload locations of the e-mail. A URL can be copied by clicking the **Copy URL** button next to it. You can also click a URL to open the e-mail in the corresponding location.

b. This area lists all of the locations where this e-mail failed to be uploaded.
Sharing Files with Others (Quick Share)

The Quick Share feature copies a version of a file to the selected Quick Share location. By using the Quick Share feature, you have complete control over who can access a file and what kind of actions you will allow users to take on this file. A copy of the original remains, and depending upon the permissions you configure, the file in the Quick Share location can be edited for as long as you require.

*Note*: Before sharing files with others, make sure you have enough permissions:

- At least **Contribute** permission to the selected Quick Share location.
- For SharePoint 2016 and SharePoint Online, you must have the permission that is higher than that you want to share with others to the selected location where the sharing files will be stored.
- For SharePoint 2013, **Manage Permissions** site permission to the site where the files you want to share will be stored. Depending on the configurations of the administrator, one of the following situations you will meet when you do not have this permission:
  - The account configured in the SharePoint Server Settings will be used to perform the Quick Share.
  - The Quick Share action needs to be approved by the user who has the **Manage Permissions** site permission to the site where the files you want to share will be stored.

Depending on the settings configured by your SharePoint administrator, the following two situations will occur:

- If the Office Connect Manager is configured to integrate with AvePoint Perimeter/AvePoint Perimeter Online, you can share objects with both internal users and external users.
- If the Office Connect Manager is not configured to integrate with AvePoint Perimeter/AvePoint Perimeter Online, you can share objects only with internal users. If you enter external users into the **To** or **Cc** fields to share objects, the following pop-up message will appear:

![Figure 9: The warning message.](image)

AvePoint Office Connect User Guide
*Note: Internal users and external users are configured by your administrator.

*Note: The Quick Share feature is also available for ADFS users when the ADFS authentication provider and trusted domain account have been configured by the administrator and the Office Connect service has been restarted.

**Using Quick Share via Windows File Explorer, Office, or Adobe**

Quick Share copies a version of an object to the Quick Share location you selected. You can share files and invite people to edit and view files.

1. The Quick Share interface can be triggered in the following ways:
   
   • Right-click one or more files/folders on your computer, and then select the **Quick Share** option from the drop-down menu.
   
   • In an Office file (including Microsoft Word Documents, Microsoft Excel Worksheets, and Microsoft PowerPoint Presentations), click **HOME** tab > **Office Connect** group > **Quick Share**.
   
   • Open a PDF file with Adobe Acrobat DC or Adobe Reader, click **Quick Share** in the **Office Connect** tab.

2. In the **Quick Share** interface, configure the following settings:
Figure 10: The Quick Share interface.

a. **Share** – The files you selected to share with other users will be attached in this field or the file within which you clicked Quick Share will be attached in this field.

   *Note:* If you select one or multiple folders for Quick Share, only files in the selected folders will be attached in this field.

b. **Location** – Select a Quick Share location where you want to store the shared files. If the desired location does not exist in the drop-down menu, click the Manage Location link to configure a new location.

   For more information, refer to Managing Quick Share Locations.

c. **Invite People** – Specify the users with whom you want to share the files by entering their user names or e-mail addresses in the text boxes.

   - **Can Edit** – Users will have the Contribute permission to the shared files.
   - **Can View** – Users will have the Read permission to the shared files.

d. The text entered in the main text box will be the content of the e-mail notification sent to the users with whom the files are shared. For more information on the e-mail notification, refer to Quick Share E-mail Notifications.
e. Click the **SHOW OPTIONS** link to unfold the following two checkboxes:

   o **Send an e-mail invitation** – Select this checkbox to send an e-mail invitation to the users with whom you want to share the files.

      *Note*: Only when this checkbox is selected can you enter content in the main text box. If you select a SharePoint Online location to store files shared with an external user, an e-mail notification will be send regardless.

   o **Remove shared files from original location** – Select this checkbox to remove the shared files from their original locations after being shared successfully. The shared files will be moved to the selected Quick Share location for future use.

      *Note*: The shared files will be permanently deleted from the original location.

Once clicked, the link will change to **HIDE OPTIONS**. Click the **HIDE OPTIONS** link to hide the checkboxes above.

f. Click **Edit E-mail Account** to change the credentials saved for sending the Quick Share e-mail notification.

g. Click **Share** to share the files, or click **Cancel** to exit the **Quick Share** interface.

h. After sharing the files using Quick Share, a copy of the shared files will be saved to the selected Quick Share location and the following message will appear. Click the location allows you to open the list, library, or folder with your default browser.

![Office Connect](image)

**Figure 11**: Shared files' links.

3. For users who have not yet saved their credentials for the Quick Share e-mail notification, the following window will appear.
a. Enter the account credentials used to log into Outlook and to send the Quick Share e-mail notification.

b. Select the Save Credential checkbox to save the credentials.

c. Click OK to test whether or not the account can successfully log into the configured SMTP Server. If the test fails, an error message will appear in this window.

*Note: If the My Site Quick Share default location, which is named **OneDrive for Business (On-Premises) Library/OneDrive for Business (Online) Library** in the Location drop-down menu, is selected in the Quick Share interface to store shared files, a pop-up window will appear letting users enter their credentials. The credentials will be used to connect to the My Site Quick Share default location.
Using Quick Share via Outlook

In Outlook, you can also share attachments in a new e-mail using Quick Share.

1. In a new e-mail, attach the files that you want to share with other users.
   
   *Note: If you selected the Prompts you to save the attachments to SharePoint and send the links back in an e-mail notification checkbox in the Pop-up Settings, a message will appear after you attach a file and ask whether or not you want to save the file to SharePoint.

   ![Figure 13: The pop-up message.](image)

   To save the attachment to SharePoint, click Yes. To share the attachment using Quick Share, click No.

2. Enter the usernames or e-mail addresses in the To and Cc fields with whom you want to share the attachments.
   
   *Note: Users specified in the To field will have Contribute permission to the shared attachments. Users specified in the Cc field will have Read permission to the shared attachments.

3. Enter a Subject and the e-mail content.

4. Select a Quick Share location from the Location drop-down menu to store the shared attachments. The default location is your My Site OneDrive library. If there is no desired location in the drop-down menu, click Manage Locations in the Office Connect group on the ribbon to add a location. For more information, refer to Managing Quick Share Locations.

5. Click Quick Share in the Office Connect group on the ribbon to perform the Quick Share.
   
   *Note: If you selected the Prompts you to save the e-mails to SharePoint after sending an e-mail checkbox in the Pop-up Settings, a message will appear and ask whether or not you want to save this e-mail to SharePoint.
Figure 14: The pop-up message.

6. After sharing the attached files using Quick Share, a copy of the shared files will be saved to the selected Quick Share location and the below pop-up window will appear. Click the location in the window to open the Quick Share location with your default browser.

Figure 15: Shared files' links.

7. In the e-mail, the shared files are listed below the e-mail content and displayed as hyperlinks. For more information on e-mail notifications, refer to Quick Share E-mail Notifications.

Managing Quick Share Locations

Quick Share locations can be managed in the Manage Location interface. To access this interface, use one of the following two methods:

- In the Quick Share interface, click the Manage Location link.
- In a new e-mail in Outlook, click Manage Location in the Office Connect group on the ribbon.
Figure 16: The Manage Location interface.

In the **Manage Location** interface, refer to the following steps to add a Quick Share location.

1. Load the **Favorites, Recent Location, SharePoint Connections**, or **Office 365 Groups** node, and select the library, folder, or group that you want to add as a Quick Share location.

2. Click **Add >>**, the library, folder, or group will be displayed in the Quick Share Location list.

   *Note: The library, folder, or group cannot be added if a location with the same name already exists.

3. Click **Save** on the lower-right corner of the interface to save changes.

*Note: You may add up to 10 Quick Share locations. **OneDrive for Business (On-Premises) Library** and **OneDrive for Business (Online) Library** are default Quick Share locations that will be displayed based on the configuration of your administrator.
Refer to the following steps to remove an existing Quick Share location.

1. Select an existing Quick Share location on the right pane of the interface.
2. Click \texttt{Remove}, the selected location will be removed from the Quick Share location list.
3. Click \texttt{Save} on the lower-right corner of the interface to save changes.
Quick Share E-mail Notifications

If the Send an e-mail invitation checkbox is selected when configuring Quick Share settings, e-mail notifications will be sent to specified users.

Successful Sharing E-mail Notifications

If the Quick Share is successful, the users with whom the files are shared will receive an e-mail notification.

*Note: To share content with external users and store the shared content in a SharePoint On-premises location, or share SharePoint On-premises content with external users by using the Share button in the Office Connect interface, your SharePoint administrator must configure the Office Connect Manager to integrate with AvePoint Perimeter.

E-mail Notifications of Quick Share from Windows File Explorer, Office, and Adobe

If you share files on your computer from the Quick Share interface, a successful e-mail notification will be sent in the following format:

Figure 17: The e-mail notification format when sharing a file.

Subject: [Username] has shared [File Name(s)].

Content:

Customized content entered in the main text box of the Quick Share interface.

Sharing Information: For details on the file sharing information, see Viewing Shared Content via the Links in E-mail.
E-mail Notifications from Outlook Quick Share

If you share attachments via a new e-mail, a successful e-mail notification will be sent in the following format:

![Sharing Content](image)

**Subject:** The subject you entered in the e-mail.

**Content:**

The content you entered in the e-mail.

**Sharing Information:** For details on the file sharing information, see [Viewing Shared Content via the Links in E-mail](#).

**Viewing Shared Content via the Links in E-mail**

The information that is displayed on what is shared varies depending upon who you share files or attachments with and the Quick Share location you select in the Quick Share.

*Note:* If you shared multiple files, the name of each file will be displayed on each line.
Shared with Internal Users
If you shared content with internal users:

![Shared File Link: test.docx 11.21KB](image)

Figure 19: Shared with internal users.

Shared with External Users (SharePoint On-Premises)
If you share content with external users and select a SharePoint On-premises library as the Quick Share location, or you select a SharePoint On-premises file and click **Quick Share** on the ribbon of the **Office Connect** interface, the content of the e-mail notification will look like either of the two examples below, depending on the settings configured by your SharePoint administrator:

![Shared File Link: test.docx 11.21KB](image)

If you do not have a Perimeter account, please register to view the shared files.

**Register**

Figure 20: Shared with external users (without an organization configured).

![Shared File Link: test.docx 11.21KB](image)

If you are not an employee of Company X, please view the shared files by clicking the following links:

If you do not have a Perimeter account, please register to view the shared files.

**Register**

Figure 21: Shared with external users (with an organization configured).

If you are an external user, you can view the shared files by clicking the link to the filename. If you do not have a Perimeter account, click the **Register** link to register to view the shared files.
Shared with External Users (SharePoint Online)

If you share content with external users and select a SharePoint Online library as the Quick Share location, or you select a SharePoint Online file and click Quick Share on the ribbon of the Office Connect interface, the message in the e-mail notification will be one of the followings based on the configuration of the administrator:

- I have shared some files with you via AvePoint Office Connect. If you are not an employee of Company X, you will be able to access the files in subsequent e-mails that you will receive shortly. If you are, please use the links above.

- I have shared some files with you via AvePoint Office Connect. If you do not belong to the same company, you will be able to access the files in subsequent e-mails that you will receive shortly. If you do, please use the links above.

*Note:* You will not receive the e-mail above if the Send an e-mail invitation checkbox is not selected during the Quick Share.
You will also receive an e-mail notification for each file shared with you. See the screenshot below:

Figure 22: Shared with external users (SharePoint Online).

Clicking the filename in the e-mail notification allows you to access the file.
Failed E-mail Notifications

If the Quick Share fails, the user who shared the files will receive an e-mail notification.

```
[Username] has shared [File Name(s)].
```

Quick Share operation ([Username] has shared [File Name(s)]) has encountered an error.

test.docx failed to be uploaded. Details: Cannot upload the file. The file size is 0 KB.

*Note: If you share the attachments in an e-mail, the entered subject will replace [Username] has shared [File Name(s)].

```
[Sharing Content] Quick Share Failure Notification

Subject: [Username] has shared [File Name(s)].

Content: Quick Share operation ([Username] has shared [File Name(s)]) has encountered an error.

[Failed File Name(s)] failed to be uploaded. Details: [Information about why the operation failed].

[Username] has been notified of this error.
```

If the Quick Share is successful but the e-mail notification failed to be sent, the user who shared the files will receive the following e-mail notification:

```
[Username] has shared [File Name(s)].
```

**Sharing Information:** For details on the file sharing information, see Viewing Shared Content via the Links in E-mail.
Office Connect failed to send the e-mail notification to the following users: [E-mail Address(es)]. Details: [Detailed Information]. If the issue persists, please contact your IT Admin.
Additional Functions in Outlook

In the Office Connect group on the ribbon of Outlook, the Office Connect Explorer button is available. Click this button, and the Office Connect interface will appear and be embedded into the right panel of the Outlook viewing pane.

In the Office Connect client, the following buttons are added to the Outlook ribbon of a new e-mail:

- **Send and File** – Allows you to send the new e-mail and save it to SharePoint. For more information, refer to Sending and Filing Your E-mail.
- **Insert Links** – Allows you to insert SharePoint or Secure Share links of objects in SharePoint, and insert SharePoint files as attachments in the e-mail window. For more information, refer to Inserting Links in an E-mail.
- **Save Attachments to SharePoint** – Allows you to save the attachments of the new e-mail to SharePoint.
- **Quick Share** – Allows you to share the attachments of the new e-mail with other users. You can select an existing Quick Share location from the Location drop-down menu to store the shared attachments.
- **Manage Location** – Allows you to manage Quick Share locations where the shared attachments are stored. For more information, refer to Managing Quick Share Locations.

Sending and Filing Your E-mail

After you create a new e-mail, you can save it to SharePoint directly after successfully sending the e-mail. Refer to the following steps to send and file an e-mail:

1. After creating an e-mail, click Send and File in the Office Connect group on the ribbon.
2. After the e-mail is sent successfully, the Office Connect interface appears with the e-mail listed on the right pane of the interface. For more information, refer to Uploading Objects to SharePoint via Office Connect.

Inserting Links in an E-mail

When you open an e-mail window, you can insert links of libraries, folders, and files. Office Connect supports inserting only two types of links, SharePoint link and Secure Share link.

Inserting SharePoint Links in an E-mail

Once you insert SharePoint links in an e-mail, users who receive the e-mail can access the library, folder, or file in SharePoint by clicking the library, folder, or file name in the e-mail.

Refer to the following steps to insert SharePoint links into an e-mail:
1. In the e-mail window, click **Insert Links** in the **Office Connect** group on the ribbon and select the **Insert SharePoint Link** option from the drop-down menu.

2. In the **Office Connect** pop-up window, expand the tree on the left pane and select the site, list, library, folder, or group where the libraries, folders, or files you want to insert into the e-mail are located.

3. After libraries, folders, or files in the selected site, list, library, folder, or group are listed on the right pane of the interface, select the libraries, folders, or files you want to insert, and then click **Insert As Links** on the lower-right corner of the interface.

4. The selected libraries, folders, or files will be inserted to the e-mail.

5. In the received e-mail, users can see the SharePoint links of the libraries, folders, and files in a table.

**Inserting Secure Share Links in an E-mail**

Once you insert secure share links in an e-mail, users who receive the e-mail can access the External Portal of Perimeter or Perimeter Online portal by clicking an object name in the e-mail. Users can see all libraries, folders, and files that are shared with them after they login.

*Note: If the integrated Perimeter is in a version below 1.7, ensure that the internal user who performs a secure share using the Perimeter Secure Share functionality has been added as a Perimeter internal user. For more information on adding an AD user as the Perimeter internal user, refer to the Synchronizing Active Directory Users section of the AvePoint Perimeter Administrator Guide.

Refer to the following steps to insert secure share links into an e-mail:

1. In the e-mail window, click **Insert Links** in the **Office Connect** group on the ribbon and select the **Insert Secure Share Link** option from the drop-down menu.

   *Note: This option is only available when the Perimeter Integration Configuration settings have been configured in the Manager Configuration Tool by your administrator.

2. In the **Office Connect** pop-up window, expand the tree on the left pane and select the site, library, or folder where the libraries, folders, and files you want to insert are located.

3. Select the libraries, folders, and files you want to insert on the right pane, and configure the permission you want to share on the selected objects.

   By default, users entered in the **To** text box of the e-mail will be granted the **Contribute** permission and users entered in the **Cc** text box will be granted the **Read** permission after the e-mail is sent.

   *Note: Secure Share is not supported for groups. If groups are entered in the **To** or **Cc** text box, the inserted objects in the e-mail will not be shared and a warning message will appear.

4. If the selected libraries, folders, and files are located in a SharePoint On-Premises node, you can further configure the permissions shared with other users on the selected objects.
**Note:** The permission that can be assigned to each user is also restricted by the Secure Share Policy settings configured in Perimeter.

- If the integrated Perimeter is in a version below 1.7 or Perimeter has not been integrated, the **Grant Read Permission to All Users** checkbox is selectable. Selecting this checkbox to grant users entered in both **To** and **Cc** text boxes the **Read** permission.

- If the integrated Perimeter is in version 1.7 or above, you can see a permission level link at the bottom of the right pane. Click the permission level link, and the **Secure Share** pop-up window appears.

```
Secure Share

Permission Level: To recipients can:
- Read Only
- Download
- Edit
- Edit in Browser Only

Cc recipients can:
- Read Only
- Download
- Edit

Learn More About Permission Details

Expiration: [ ] Days

Notification: [ ] Notify everyone this file is shared with if the file is updated.
[ ] Notify me once this file is downloaded by anyone.
```

![Figure 25: The Secure Share pop-up window.](image)

- **Permission Level** – Configure the permissions that will be assigned to the To and Cc recipients. Click the **Learn More About Permission Details** link on the left to view the capabilities of each permission level.
5. If the selected libraries, folders, and files are located in a SharePoint Online node, you can further configure the permissions shared with other users on the selected objects.

- If Perimeter Online has not been integrated, the Grant Read Permission to All Users checkbox is selectable. Selecting this checkbox to grant users entered in both To and Cc text boxes the Read permission.

- If Perimeter Online has been integrated and the SharePoint Online node where the selected objects reside has authorized Perimeter Online, you can see a permission level link at the bottom of the right pane. Click the permission level link, and the Secure Share pop-up window appears.
Figure 27: The Secure Share pop-up window.

- **Permission Level** – Configure the permissions that will be assigned to the To and Cc recipients. Click the Learn More About Permission Details link on the left to view the capabilities of each permission level.
Figure 28: The Permission Level Capabilities pop-up window.

- **Expire After** – Enter an integer in the text box to configure a period of validity for the granted permissions.
- **Watermark Settings** – Configure the watermark settings for the shared folders and files.
  - **Watermark** – Enter the text that you want to configure as the watermark.
  - **Font Size** – Enter the font size for the watermark. The default value is 80.

6. Select the libraries, folders, and files you want to insert on the right pane of the interface, and click **Insert As Links** on the lower-right corner of the interface.

7. The selected objects will be inserted into a table of the e-mail.

<table>
<thead>
<tr>
<th>Shared File Link</th>
<th>File Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>library1</td>
<td>Library</td>
</tr>
<tr>
<td>folder1</td>
<td>Folder</td>
</tr>
<tr>
<td>file1.docx</td>
<td>24.78KB</td>
</tr>
</tbody>
</table>

Office Connect has shared these items using Perimeter Secure Share. [Learn More]

Figure 29: The secure share table.
8. In the received e-mail, clicking an object name allows users to access the External Portal of Perimeter or Perimeter Online portal and see all libraries, folders, and files shared with them after they login.

Inserting Attachment from SharePoint

When you open an e-mail window, you can insert SharePoint files to the e-mail as attachments using Office Connect. Refer to the following steps to insert attachment from SharePoint:

1. In the e-mail window, click Insert Links in the Office Connect group on the ribbon and select the Insert Attachment from SharePoint option from the drop-down menu.
2. In the Office Connect pop-up window, expand the tree on the left pane and select the library or folder where files you want to insert into the e-mail are located.
3. After files in the selected library or folder are listed on the right pane of the interface, select the files you want to insert, and then click Insert As Attachments on the lower-right corner of the interface.
4. The selected files will be inserted to the e-mail as attachments.
Office Connect Settings in Outlook

On the Office Connect client, the Office Connect tab will be added to the Outlook ribbon.

In the Office Connect tab, there are three buttons in the Settings group on the ribbon: Office Connect Settings, Manage Favorites, and Archive Attachment. Also, there is a button named User Guide in the Help group on the ribbon. Refer to the sections below for details on the Office Connect tab buttons.

![Office Connect tab](image)

Figure 30: The Office Connect tab.

Office Connect Settings

When you click Office Connect Settings on the ribbon, the Office Connect pop-up window appears. This window can also be accessed by clicking the Office Connect Settings (⚙️) icon on the lower-left corner of the Office Connect main interface.

In the window, the following types of settings are configurable:

- **SharePoint Connections**
- **Manage Favorites**
- **Pop-up Settings** (only available in Outlook)
- **Site Collection Scan**
- **E-mail Property Mappings** (only available in Outlook)
- **Manage Account**
- **Manager Connection**

SharePoint Connections

In the SharePoint Connections page, you can manage existing connections and add new connections.

*Note: SharePoint 2013, SharePoint 2016, and SharePoint Online site collections that use the ADFS authentication method are supported for being added as new connections.

The existing connections are listed with the following information:
Figure 31: The SharePoint Connections page.

- **Site URL** – The URL of the site collection/site that has been added as a connection.
- **Title** – The title of the site collection/site.
- **Credentials** – The credentials configured to connect to the site collection/site when adding it as a SharePoint connection. You can edit the credentials of a connection by clicking the down arrow (▼) button in the Credentials column of the connection, and selecting other credentials from the drop-down list or selecting New Credentials to use a new credentials. Selecting the checkbox to the left of a connection and clicking Edit Credentials on the ribbon also allow you to edit the credentials of the connection.
- **Action** – Actions that can be taken on the SharePoint connection.
  - Click Test in the row of a connection to perform a validation test on the connection.
    - If the test is successful, the (✔) icon will appear in front of the connection URL.
    - If the test fails, the (✖) icon will appear in front of the connection URL. Hover your mouse over the icon to see the details on the test.
  - Click the Remove (❌) button in the same row as a connection to delete the connection.
*Note: This button is not available for the built-in SharePoint connections that are configured by the administrator.

To add a new connection, you can use one of the following methods:

- Click Add Connection on the ribbon. An empty row appears. Enter the information on the site collection/site that you want to add as a connection. Click Save on the lower-right corner of the interface to save the connection.
- Select a scanned site collection in the Site Collection Scan page, and click Save to add the selected site collection as a connection.

Manage Favorites

In the Manage Favorites page, there are two areas. The left area contains the Recent Location, SharePoint Connections, and Office 365 Groups (if configured) nodes where site collections, sites, lists, libraries, and folders can be added to the favorites list. The right area contains the Favorites node where all nodes in your favorites list are listed.

Figure 32: The Manage Favorites page.

Refer to the instructions below to add a node to your favorites list:
1. Load the Recent Location, SharePoint Connections, or Office 365 Groups node, and select a site collection, site, list, library, or folder that you want to add to your favorites list.

2. Select Favorites or a custom folder under Favorites where you want to add the site collection, site, list, library, or folder.

3. Click Add >>, the site collection, site, list, library, or folder will be added to the favorites list.
   *Note: A node cannot be added to the favorites list if another node with the same name already exists.

4. Click Save on the lower-right corner of the page to save the changes.

**Pop-up Settings**

Office Connect provides configurable pop-up screens that will help guide you and provide you with information about moving e-mail to SharePoint, saving attachments to SharePoint, saving sent e-mails to SharePoint, and sharing files with other users. In the Pop-up Settings page, you can configure the following settings for Outlook.

![Office Connect Pop-up Settings](image)

*Figure 33: The Pop-up Settings page.*

- **Prompts you to select locations where e-mails can be moved if they failed to be moved to SharePoint** – Enable this setting to make the following window pop up when
the e-mails you drag and drop into the Favorites node fail to be moved. For example, if you close the pop up **Office Connect** interface manually.

![Office Connect](image)

Figure 34: Failed e-mail pop-up setting.

Two locations are available for the failed e-mails:

- The original location of the failed e-mails
- The **Failed Items** folder that is automatically created

*Note*: If this setting is disabled, the failed e-mails will be automatically saved to their original locations.

- **Prompts you to save the attachments to SharePoint and send the links back in an e-mail notification** – If this setting is enabled, the following pop-up window will appear when you attach a file to an e-mail. If multiple files are attached to an e-mail, the pop-up window will appear once for each attachment.

![Office Connect](image)

Figure 35: New attachment pop-up setting.

- Click **Yes** to save attachments to SharePoint. The **Office Connect** interface will appear with the attachment listed in the right pane.
- Click **No** if you do not want to save attachments to SharePoint.

If this setting is disabled, you can set a default value by selecting **Save** or **Don’t Save**.
• **Prompts you to save the e-mail to SharePoint after sending an e-mail** – If this setting is enabled, the following pop-up window will appear when an e-mail is sent successfully.

![Sent e-mail pop-up setting](image)

Figure 36: Sent e-mail pop-up setting.

- Select **Yes** to save the e-mail to SharePoint.
- Select **No** if you do not want to save the e-mail to SharePoint.

If this setting is disabled, you can set a default value by selecting **Save** or **Don’t Save**.

• **Prompts you to review permission levels for assigning to other users before performing a Quick Share** – If this setting is enabled, the following pop-up window will appear when the Quick Share is going to be performed. The permission levels for sharing will be listed in the pop-up window.

![Quick Share permission pop-up setting](image)

Figure 37: Quick Share permission pop-up setting.

• **Prompts you to upload attachments when e-mails are dragged and dropped into the Office Connect folder in Outlook** – If this setting is enabled, the following pop-up window will appear when an e-mail with attachments is dragged and dropped into a favorite node under the Office Connect folder in Outlook.
Figure 38: Upload e-mail attachments pop-up message.

If this setting is disabled, you can set a default value by selecting **Upload attachments only** or **Upload e-mails together with attachments**.

- **Allows you to perform other Outlook operations while files are being uploaded** – If this setting is enabled, you can perform other operations using Office Connect in Outlook while files are being uploaded by Office Connect.

- **Prompts you to share the inserted SharePoint links in the e-mail** – If this setting is enabled, the following pop-up window will appear when links of SharePoint objects are inserted to an e-mail asking whether you want to share the links.

Figure 39: Insert SharePoint link pop-up message.

If this setting is disabled, you can set a default value by selecting **Share Permission** or **Don’t Share Permission**.

If the **Don’t show me again** checkbox is selected, the corresponding pop-up setting checkbox will be automatically deselected and the pop-up window will not appear.

**Site Collection Scan**

In the **Site Collection Scan** page, you can scan the site collections that an account has permission to access by clicking **Scan** on the ribbon or the **Scan** link to start the site collection scan. The site collections that the selected account has permission to access will be scanned and listed below. You can also select
**New Credentials** from the credentials drop-down list and enter the **Username** and **Password** of the account to scan the site collections that the account has permission to access.

*Note:* If the entered account is an ADFS user, site collections in the Web application that are configured with the ADFS authentication and the ADFS user that has permission to access will be listed.

The scanned site collections can be added as SharePoint connections directly. Refer to the following steps to add a site collection:

1. Select the checkboxes of the site collections you want to add, and then click **Save** on the lower-right corner of the **Office Connect** interface.

2. The site collections will be added as SharePoint connections and listed in the **SharePoint Connections** page.

![Office Connect](image)

*Figure 40: The Site Collection Scan page.*

In the **Site Collection Scan** page, you can also scan Office 365 groups by selecting an Office 365 account from the credentials drop-down list and clicking **Scan Office 365 Group** on the ribbon. All Office 365 groups of which the account is a member or owner will be scanned and displayed in the list.

*Note:* The **Scan Office 365 Group** button is only available when the SharePoint Online settings have been configured by the administrator.

For the listed site collections/Office 365 groups, you can view the following information:
• **Title** – The title of the site collection/group.
• **Site URL** – The full URL of the site collection/group team site.
• **Description** – The description of the site collection/group.

The scanned Office 365 groups can be saved and displayed on the Office Connect tree view. Refer to the following steps to save a group:

1. Select the checkboxes of the Office 365 groups you want to save, and then click **Save** on the lower-right corner of the **Office Connect** interface.
2. The groups will be saved and displayed on the Office Connect tree view and listed under the **Office 365 Groups** node.

### E-mail Property Mappings

In the **E-mail Property Mappings** page, you can configure mappings that map e-mail properties to SharePoint columns for e-mails uploaded to SharePoint.

![E-mail Property Mappings](image)

**Figure 41:** The E-mail Property Mappings page.

Select the **Use mappings configured in manager** checkbox to use the e-mail property mappings configured in Manager Configuration Tool by your administrator. To customize e-mail property mappings, deselect this checkbox and configure the mappings below.
By default, six e-mail property mappings are provided.

<table>
<thead>
<tr>
<th>E-mail Property</th>
<th>SharePoint Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>To</td>
<td>AvePoint_To</td>
</tr>
<tr>
<td>CC</td>
<td>AvePoint_Cc</td>
</tr>
<tr>
<td>From</td>
<td>AvePoint_From</td>
</tr>
<tr>
<td>Subject</td>
<td>AvePoint_Subject</td>
</tr>
<tr>
<td>SendTime</td>
<td>AvePoint_Sent Time</td>
</tr>
<tr>
<td>Attachment</td>
<td>AvePoint_Attachment</td>
</tr>
</tbody>
</table>

To add an e-mail mapping, click **Add Mapping** above the mapping list. New mapping text boxes appear. Enter the e-mail property you want to map and the SharePoint column to which you want to map the e-mail property in the corresponding text boxes.

To remove an existing e-mail mapping, click the Remove (×) button in the same row as the mapping.

**Manage Account**

In the **Manage Account** page, all accounts configured within Office Connect are listed.

![Manage Account](image)

**Figure 42: The Manage Account page.**
You can perform the following actions on these accounts:

- **Delete** – To delete an account, click **Delete** in the **Action** column of the account.
  
  *Note*: The current login user on this server will be suffixed by *(Current)* in the account name and this account cannot be deleted.

- **Set as Default** – To set an account as the default account, click **Set as Default** in the **Action** column of the account.
  
  *Note*: The default account cannot be deleted.

**Manager Connection**

In the **Manager Connection** page, you can view the Manager to which the Office Connect is currently connected. You can also change another Office Connect Manager for connection.

![Manager Connection](image)

**Figure 43**: The Manager Connection page.

**Managing Favorites**

Click **Manage Favorites** on the ribbon to access the **Manage Favorites** page of the **Office Connect** pop-up window. For detailed information on the settings in this page, refer to **Manage Favorites**.
Archiving Attachments

Click **Archive Attachment** on the ribbon, and the **Archive Attachment** pop-up window appears. In this window, you can archive e-mail attachments and store them in SharePoint.

To archive e-mail attachments, complete the steps below in the **Archive Attachment** pop-up window.

1. Select the archiving scope.
   - **All folders** – Select this option to archive the attachments of the e-mails in all folders.
   - **This folder and all subfolders** – Select this option, and the folder structure in the text box below is selectable. Click a folder to archive the attachments of the e-mails in this folder and all subfolders of this folder.

2. Select the archiving attachments.
   - **Archive all attachments** – Select this option to archive all attachments of the e-mails in the selected archiving scope.
   - **Archive attachments that meet the selected rules** – Select this option to archive attachments that the attachments themselves or e-mails meet the selected rules.

The following rules can be selected:

   - **with a size in a specific range** – Attachments that the sizes are in a specific range will be archived.
     - Click the **in a specific range** link in the rule to define the size range. The **Attachment Size** pop-up window appears. Enter a minimum size in the **At least** text box and enter a maximum size in the **At most** text box, and then click **OK** to save the size range.

   - **with specific types** – Attachments that are in specific types will be archived.
     - Click the **specific types** link in the rule to configure the types of which attachments you want to archive. The **Attachment Type** pop-up window appears. Select the types by selecting the corresponding checkboxes, and then click **OK** to save the types.

   - **received in a specific date span** – Attachments of the e-mails that are received in a specific date span will be archived.
     - Click the **in a specific date span** link in the rule to define the date span. The **Date Received** pop-up window appears.
       - Select the **After**: checkbox and click the calendar button to select a date. Attachments of the e-mails that are received after this date will be archived.
- Select the **Before**: checkbox and click the calendar button to select a date. Attachments of the e-mails that are received before this date will be archived.

- Select both the checkboxes and select the dates, attachments of the e-mails that are received within the date span will be archived.

3. Configure the storage location.
   
   a. Click **Browse...** in the **Storage location** field. The **Browse** pop-up window appears.

   b. Select a library or folder in the **Favorites, Recent Location**, or **SharePoint Connections** node to store the archived attachments.

   *Note*: If there are required columns in the selected library or the library where the selected folder resides, archived attachments will be checked out after being uploaded. A library without any required columns is recommended.

   c. Click **OK** to save the selected location.

4. Click **OK** to perform the attachment archive.

**Opening the User Guide**

Click **User Guide** on the ribbon to open the **AvePoint Office Connect User Guide** in the Office Connect installation package.
Activity Report

User activities using Office Connect are all recorded and can be seen in the Activity Report dashboard. To view your activity report, access the Activity Report dashboard by clicking View Activity Report on the lower-left corner of the Office Connect interface.

Double-clicking the OCT Activity Report ( ) shortcut on the desktop of Office Connect Manager server allows administrators to access the dashboard.

*Note: Administrators of the Activity Report dashboard are configured by the administrator when installing Office Connect Manager or configuring the Manager Configuration Tool.

*Note: Activity Report supports being opened using Internet Explorer 8 or higher versions.

There are two views in the Activity Report dashboard: Administrator View and End-User View.

- **Administrator View** – In this view, administrator can see the following types of reports: Documents shared using Quick Share, E-mails uploaded to SharePoint, E-mail attachments uploaded to SharePoint, Documents copied or moved to SharePoint from Windows File Explorer, Documents copied to SharePoint using Office Connect drag and drop, Documents saved to SharePoint from Microsoft Office, Documents copied to SharePoint from Windows File Explorer, Documents moved to SharePoint from Windows File Explorer, E-mail attachments archived to SharePoint, and Exceptions during the usage of Office Connect. All user activities using Office Connect taken on all Office Connect servers that connect to the Office Connect Manager are collected and displayed by type.

- **End-User View** – In this view, end users can see the following types of reports: Documents shared using Quick Share, E-mails uploaded to SharePoint, E-mail attachments uploaded to SharePoint, E-mails with attachments uploaded to SharePoint, Documents copied or moved to SharePoint from Windows File Explorer, Documents copied to SharePoint using Office Connect drag and drop, Documents saved to SharePoint from Microsoft Office, and E-mail attachments archived to SharePoint. The current login user’s activities using Office Connect are collected and displayed by type.

Administrators can view data in the dashboard using both the Administrator View and End-User View. Users that are not the Administrators can view data in the dashboard using only the End-User View.

Different types of reports are displayed in tiles. The number of activities in each type is displayed on the lower-right corner of the tile.

Click a tile, user activities in the type are displayed in the activity list with the following information:

- **Object Name** – The name of the object.
- **Actioned By** – The user who performed the action.
- **Time of Action** – The time when the action is performed.
• **Status** – The status of the action.

• **Target Location** – The location of the object after the action.

*Note:* For the Exceptions during the usage of Office Connect tile, the following columns are available instead of the Status and Target Location columns.

• **Action Type** – The type of the action in the exception during the usage of Office Connect.

• **Comment** – The comment of the exception.

The user activities can be further filtered by time range. Click the calendar button in the Time Range text box to select a time range, user activities performed within the time range will be filtered.

In the Administrator View, you can also select a type of report and click Export Selected Report to export details of the selected type of report.

You can also configure retention setting for activity reports. Click Retention Setting on the upper-right corner of the dashboard, and the Retention Setting pop-up window appears.

![Retention Setting](image)

**Figure 44: The Retention Setting pop-up window.**

1. Select the action that you want to perform on the activity report data: **Delete** or **Archive**. If the Archive action is selected, the pruned data will be stored in a CSV file. You can find the CSV file in the ...\OCT\Manager\ActivityReport\temp\ArchiveReport directory on the Office Connect Manager server.

2. Configure a time period for the activity report data by entering an integer in the text box and select a time unit (Years, Weeks, or Days) from the drop-down menu. Data that is recorded within the time period will be kept. Data that is recorded out of the time period will be pruned.

3. Click **OK** to save the retention setting.
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