

365OMNIDRIVE OUTLOOK ADD-IN



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GETTING STARTED

The Outlook add-in allows you to email links to files and folders using your Microsoft Outlook application. When you use this feature, you can share links to 365OmniDrive items, and local content, directly from your email platform. Additionally, the Outlook add-in keeps track of the items that you have shared by creating and populating a “Shared Items” folder in your 365OmniDrive.

Other Outlook benefits include the ability to send:

- Links, rather than standard attachments, to files and folders of any size.
- Items as secure shares.

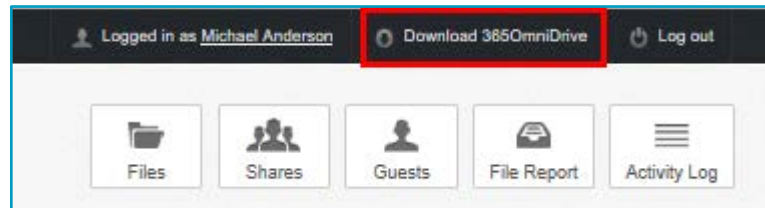
Additionally, when you forward an email that originally included an attachment, you have the option to convert that attachment to a share link. Since the Outlook add-in integrates with 365OmniDrive, you always have a backup of these shared items without needing to store attachments within your email client.

NOTE: The 365OmniDrive Outlook Add-In is not available for Mac computers.

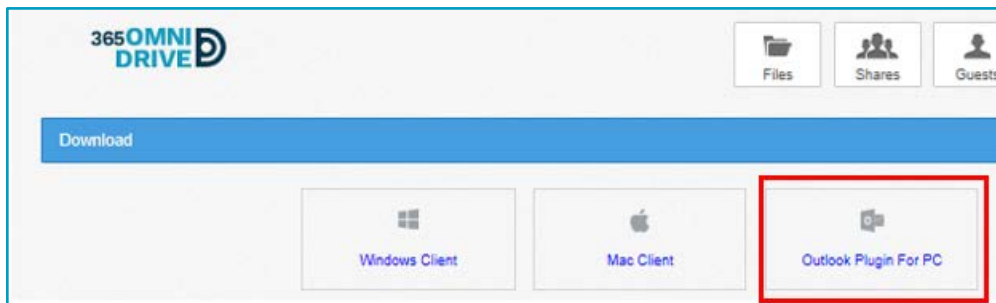
INSTALLING 365OMNIDRIVE OUTLOOK ADD-IN

To use the 365OmniDrive Outlook add-in, you must download it from the web portal.

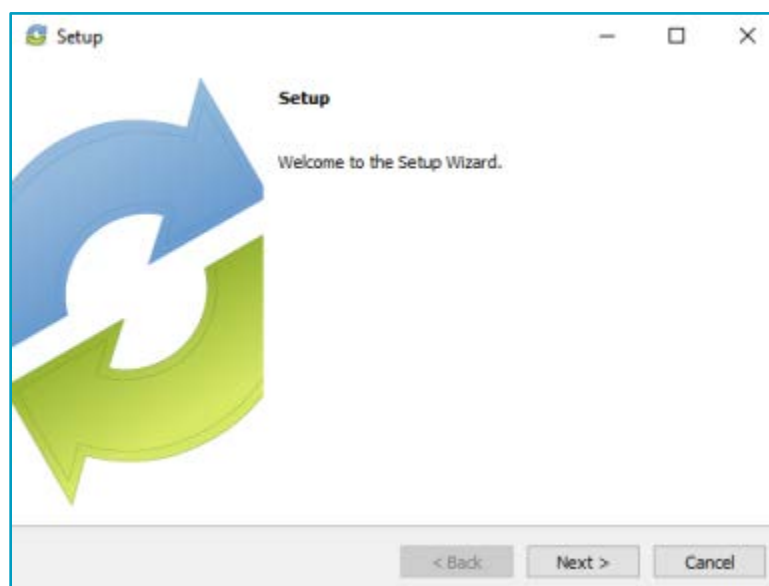
1. Click the **“Download 365OmniDrive”** button in the web portal. The **“Download”** page opens.



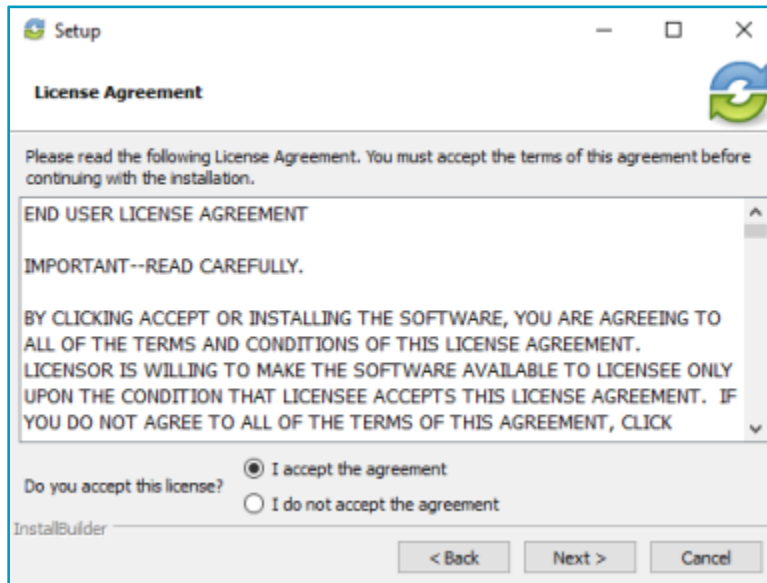
2. Click the **“Outlook Plugin for PC”** button. The file will download, or you’ll receive a prompt to save the file, depending on your browser type.



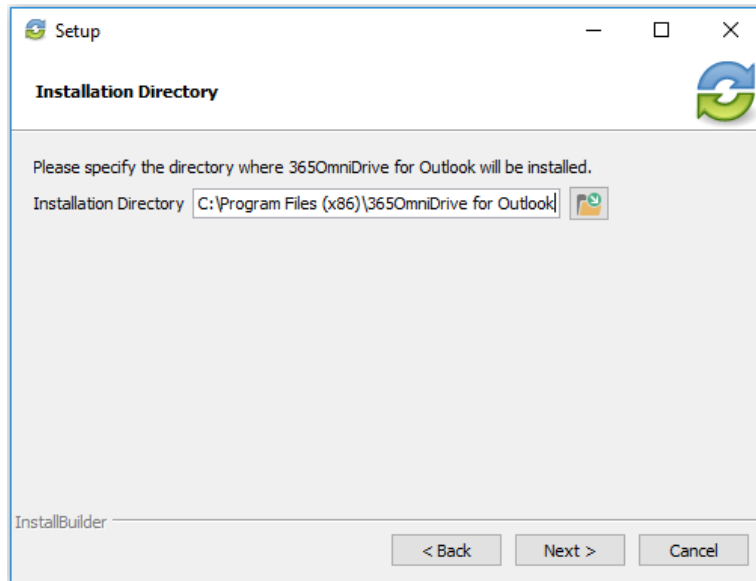
3. When the file finishes downloading, make sure you close Microsoft Outlook, and click the **“installation”** file. The **Setup Wizard** opens.
4. Click the **“Next”** button to start the **Setup Wizard**.



5. The “License Agreement” screen opens. Click the “**I accept the agreement**” radio button if you accept the license terms. Click the “**Next**” button to continue.

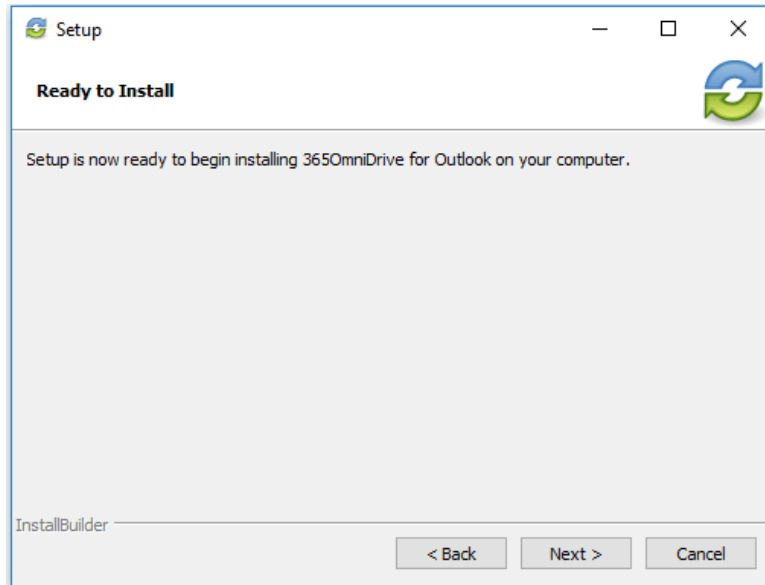


6. In the “Installation Directory” screen, select the location where you want the installation files to reside on your computer (local machine). In most instances, you can accept the default location.

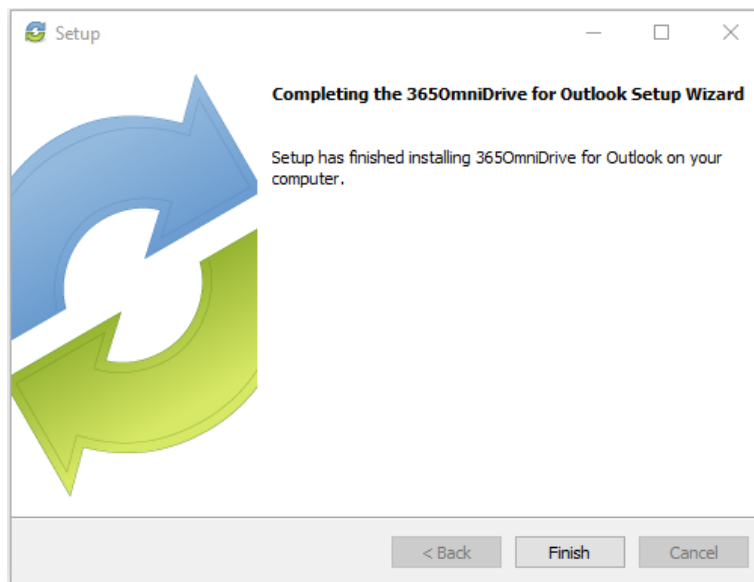


7. Click the “**Next**” button to continue.

8. In the “Ready to Install” screen, click the “**Next**” button to begin the installation process.



9. When the **Setup Wizard** completes, click the **Finish** button.



How to Configure the 365OmniDrive Outlook Add-In

After you install the Outlook Add-in, you can configure default share settings and attachment policies.

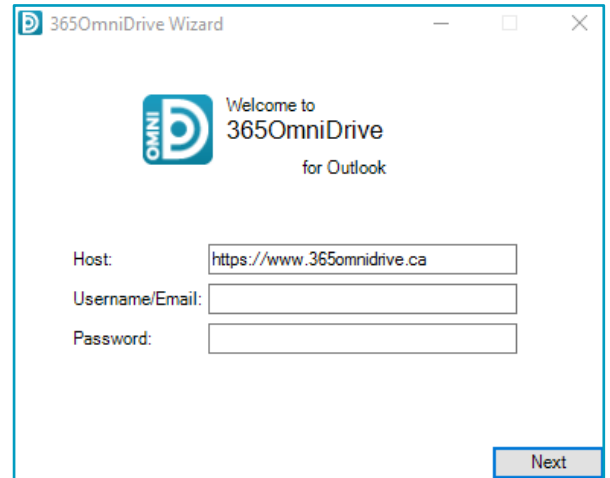
When you configure these settings, the Outlook Add-in operates as a truly intelligent tool – automatically sending share links according to your preferences.

1. When you launch Microsoft Outlook for the first time after installing the 365OmniDrive Outlook Add-in, the **365OmniDrive Wizard** displays, prompting you for your login credentials.

Enter the following:

- a. **Host:** enter 365omnidrive.ca
- b. **Username:** enter the same username that you use to access the web portal.
- c. **Password:** enter the same password that you use to access the web portal.

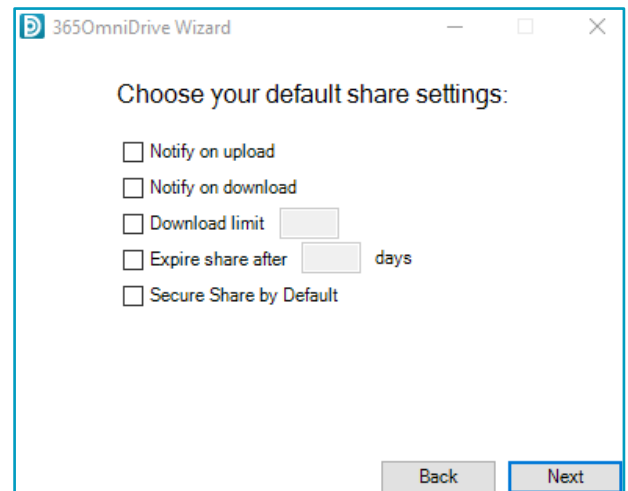
Click the **“Next”** button when you finish.



The screenshot shows the '365OmniDrive Wizard' window. It features the 365OmniDrive logo and the text 'Welcome to 365OmniDrive for Outlook'. Below this, there are three input fields: 'Host' (containing 'https://www.365omnidrive.ca'), 'Username/Email', and 'Password'. A 'Next' button is located at the bottom right of the window.

2. In the “Choose your Default Share Settings” screen, set default settings on how you share links. You have the following options:

- a. **Notify on upload:** select to receive notifications when an item uploads to a shared folder.
- b. **Notify on download:** select to receive notifications when the share downloads.
- c. **Download limit:** select and enter a number to limit the number of times a recipient can download a share.
- d. **Expire share after:** select and enter a number to set the number of days a share will expire (for example, 2 days).
- e. **Secure share by default:** depending on your administrator's configurations, you may also have access to this option that allows you to send all content as secure shares. Selecting this option means all recipients must login to access the shared content. The system adds recipients who are not members of your organization as guest users by creating a guest account and providing login credentials.

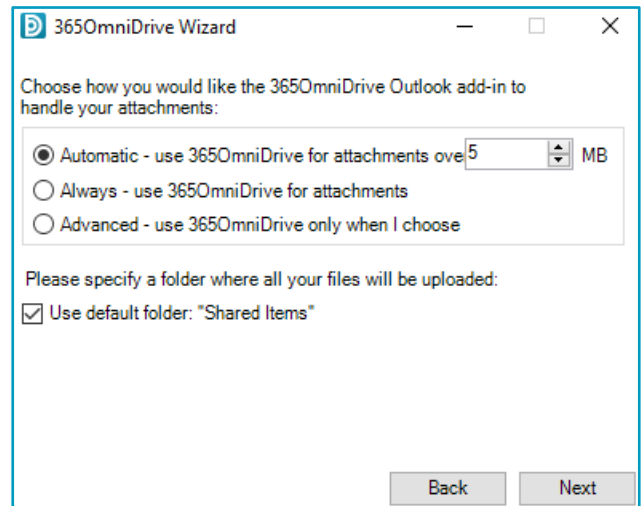


The screenshot shows the '365OmniDrive Wizard' window with the title 'Choose your default share settings:'. It contains five options, each with an unchecked checkbox: 'Notify on upload', 'Notify on download', 'Download limit' (with an empty input field), 'Expire share after' (with an empty input field and the word 'days' next to it), and 'Secure Share by Default'. At the bottom right, there are 'Back' and 'Next' buttons.

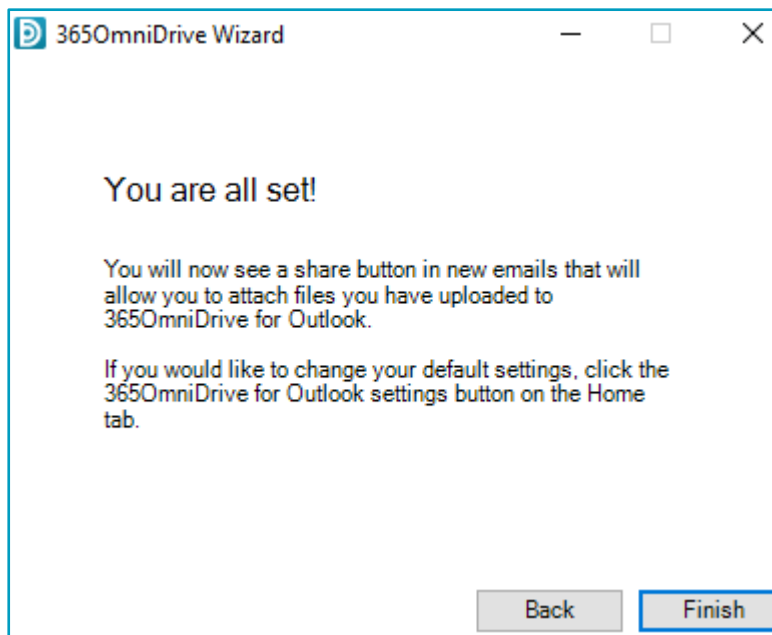
3. Click the **“Next”** button to continue.

4. In the next screen, set default attachment policies. You have the following options:

- a. **Automatic:** select to automatically use the Outlook Add-in for attachments over a certain size specified by you.
- b. **Always:** select to automatically use the Outlook Add-in for all attachments.
- c. **Advanced:** select to only use the Outlook Add-in when selected.
- d. **Use default folder:** select to use the default location for storing shares configured from Outlook. If you uncheck this checkbox, you'll receive a prompt to select another location on your computer (local machine).



5. When the **365OmniDrive Wizard** completes, click the **“Finish”** button.

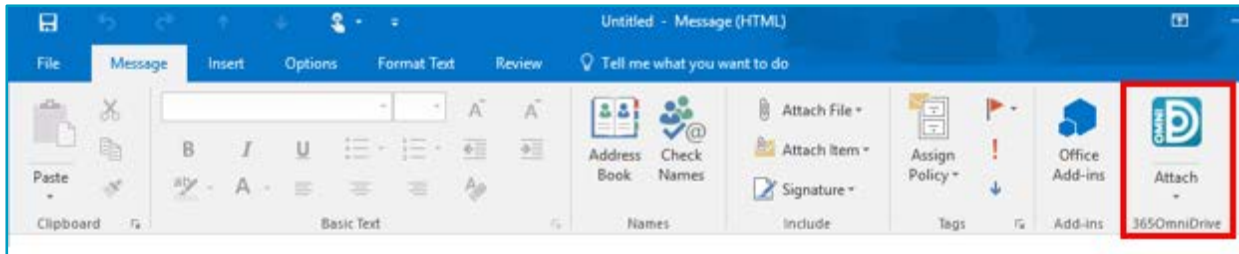


How to Use the Outlook Add-In

When you compose a message in Microsoft Outlook, you can use the “**Attach**” dropdown button to attach specific share content according to your defined preferences.

To use the Outlook Add-in:

1. In Microsoft Outlook, create a new email message. The ribbon displays a 365OmniDrive “**Attach**” dropdown button.
2. Click the “**Attach**” dropdown button and select “**Send a File.**”

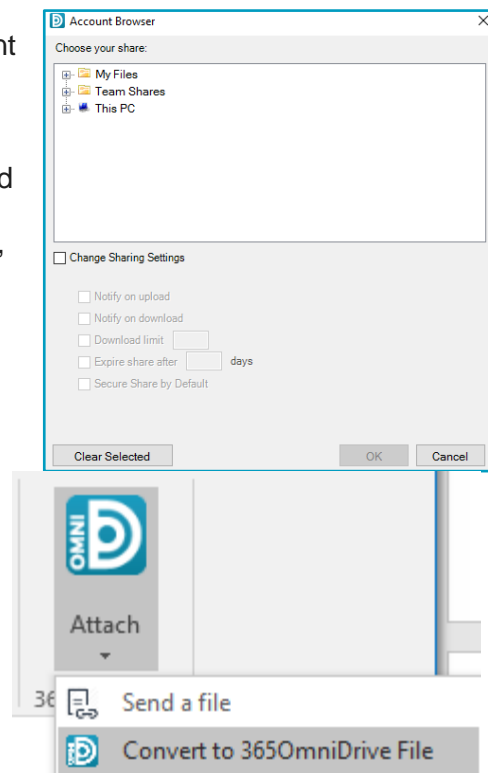


3. The “Account Browse” dialog box opens, select the content you want to share:

- a. To **attach** a file or folder stored in Synced Tool, click “My Files” folder or the “Team Shares” folder to expand and select the appropriate content.
- b. To **send** a file from your local machine, click “This PC” to expand, and browse and select a file on your machine.
- c. To change your **default share settings**, click the “**Change Share Settings**” checkbox.

4. Alternatively, to convert an attached item to a share link, click the 365OmniDrive “**Attach**” dropdown arrow in the ribbon, and select “**Convert to 365OmniDrive File.**”

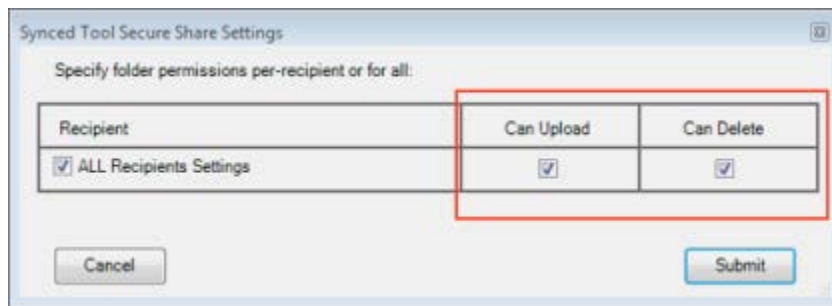
NOTE: Any attached item automatically converts to a share link and will store in your “Shared Items” folder.



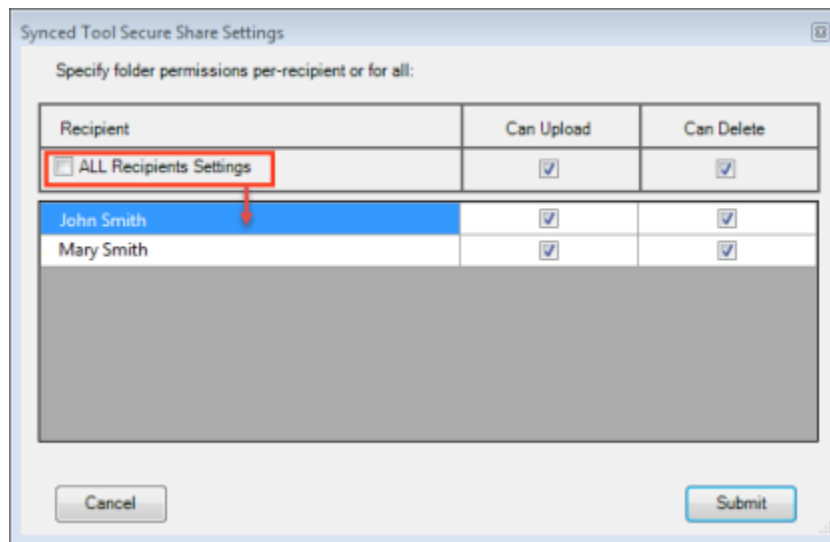
5. Click Outlook's standard **“Send”** button to send your email.

NOTE: If you have selected to send a secure share link for an entire folder (rather than a single file), a “Secure Share Settings” dialog box opens, prompting you to configure permission for each recipient. You can set:

- a. **Upload permissions** to allow recipients to upload content into the shared folder.
- b. **Delete permissions** to allow recipients to delete content in the shared folder.



Optionally, uncheck the **“ALL Recipients Settings”** checkbox if you want to configure separate permissions for each recipient.



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