



## TeamDrive Outlook-Addin 2 for Windows

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# 1 Introduction

## 1.1 About this document

This documentation describes the installation, configuration and use of the TeamDrive Outlook Addin.

## 1.2 Target group

This documentation is intended for TeamDrive users wishing to use the TeamDrive Outlook-Addin to handle email attachments.

## 1.3 Typographical conventions

Table 1: Typographical conventions

Labelling	Description
Settings	Texts on the surface, e. g. labelling on buttons or settings.
Menu item → Settings → Advanced	Menu sequence in an application.
<File-Name>, <Space-Name>	Name of a file or a space.
<i>Italic</i>	<i>Result of an operation.</i>
 Advice	Additional information that minimizes the risk of incorrect operations.

## 2 Outlook-Addin

The TeamDrive Outlook Addin for Windows allows you to use the TeamDrive cloud, in conjunction with Microsoft Outlook, to send email attachments as links to documents resulting in the following advantages:

- avoid file attachment size limitations
- increasing security by ensuring only authorized people can access the attachments
- specify an expiry time for the attachment after which it will automatically be deleted on the server
- reduce the storage space needed on email servers

Using the TeamDrive cloud for attachments is simple and flexible:

- The recipient of the email does not need a TeamDrive account to access the attachment.
- TeamDrive does not need to be running on the sender's machine to be able to send attachments as links.
- The attachments do not need to reside in a TeamDrive space.

Download the TeamDrive Outlook-Addin on TeamDrive Systems [homepage](#).

### 2.1 Installation requirements

To install the TeamDrive Outlook-Addin you need

- MS Windows 7 or later
- MS Outlook 2013 or later
- A TeamDrive Professional license
- A TeamDrive Space in the TeamDrive Cloud.

### 2.2 Installation of the Outlook-Addin

To install the TeamDrive Outlook-Addin follow these steps.

1. Download the TeamDrive Outlook-Addin package and unzip it.
2. Double-click on the file `setup.exe`.  
*The window `Microsoft Office-Customization-Installer` will be opened.*
3. Click on the **Install button**.
4. Restart TeamDrive and select a space to use for email attachments. See instructions below.
5. Restart MS Outlook and configure the TeamDrive Outlook-Addin. See instructions below.

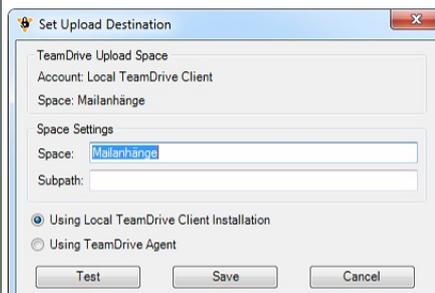
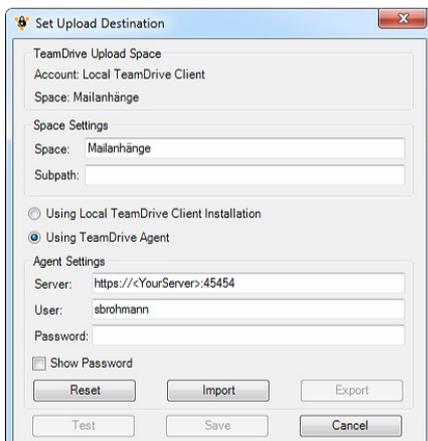
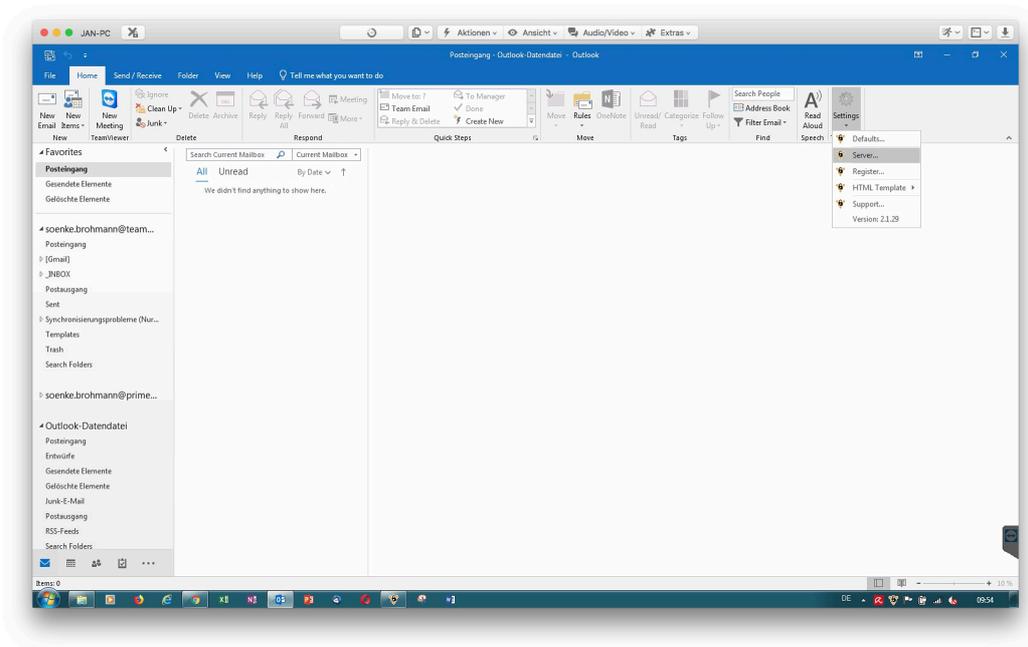
### 2.3 Configuration of the Outlook Add-in in Microsoft Outlook, Server

Before you can use e-mail attachments with TeamDrive, you must make settings in the Start Microsoft Outlook ribbon.

Open the Microsoft Outlook application.

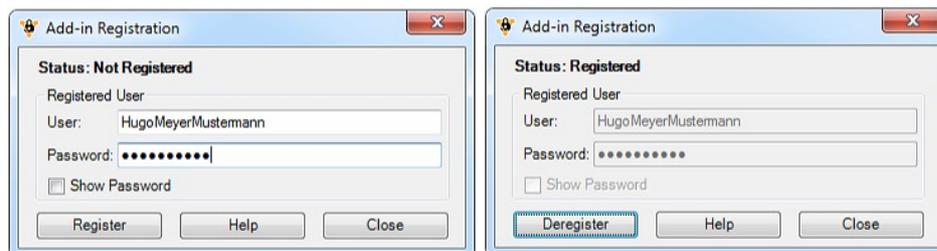
1. Select Start TeamDrive Settings>Server from the Start TeamDrive menu.
2. The Set Upload Destination hint window opens..
3. Open the Microsoft Outlook program..
4. *First select here whether you are using a TeamDrive Client or a TeamDrive Agent.*
5. *Settings for the TeamDrive Agent:*  
*Server: Enter the IP address and port of the TeamDrive Agent here.*  
*User/Password:: Enter the credentials of the TeamDrive Agent user here.*  
*Space: Enter a valid space name. In the subpath you can specify a deeper level in the space.*  
*Tip: If you want to configure several Outlook Addins, you can export the current settings and import this file to other workstations.*
6. *Settings for the TeamDrive Client:*  
*Space: Enter a valid space name. In the subpath you can specify a deeper level in the space..*

Picture 1-5: Microsoft Outlook MenuStart with TeamDrive Settings



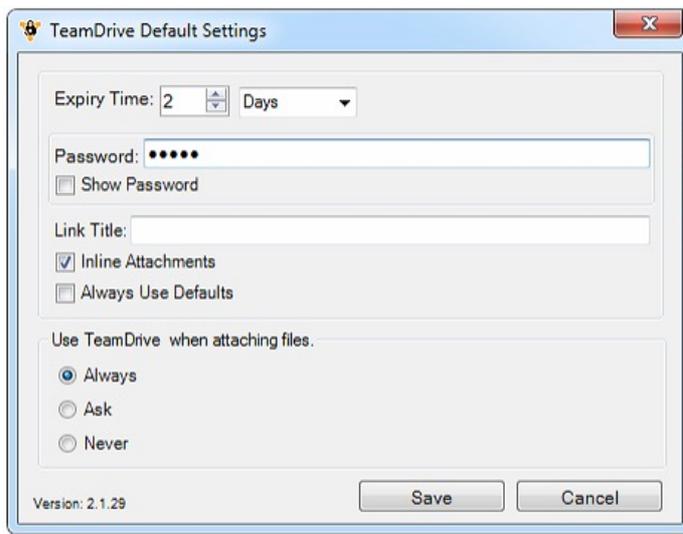
## 2.4 Configuration of the Outlook Add-in in Microsoft Outlook, Registration

1. The Outlook Addin must be registered with a valid user name and password. .
2. User/Password: Register the login data of a TeamDrive user with a valid Team-Drive Professional license..
3. on Register to complete the process and then on Cancel to close the dialog.



## 2.5 Configuration of the Outlook Add-in in Microsoft Outlook, Default Settings

1. For sending attachments, you can set a general default password and an attachment expiration date.
2. . inline attachments: Specify whether the link is included in the body text of the e-mail or appears as a file attachment in the form of an HTML file.
3. Drag & Drop attachments: Activate this option if you want files that are dragged and dropped into the e-mail to be processed via TeamDrive and as a link. If this option is disabled, attachments will be dragged into the email as a file.



## 2.6 Adding an E-Mail attachment

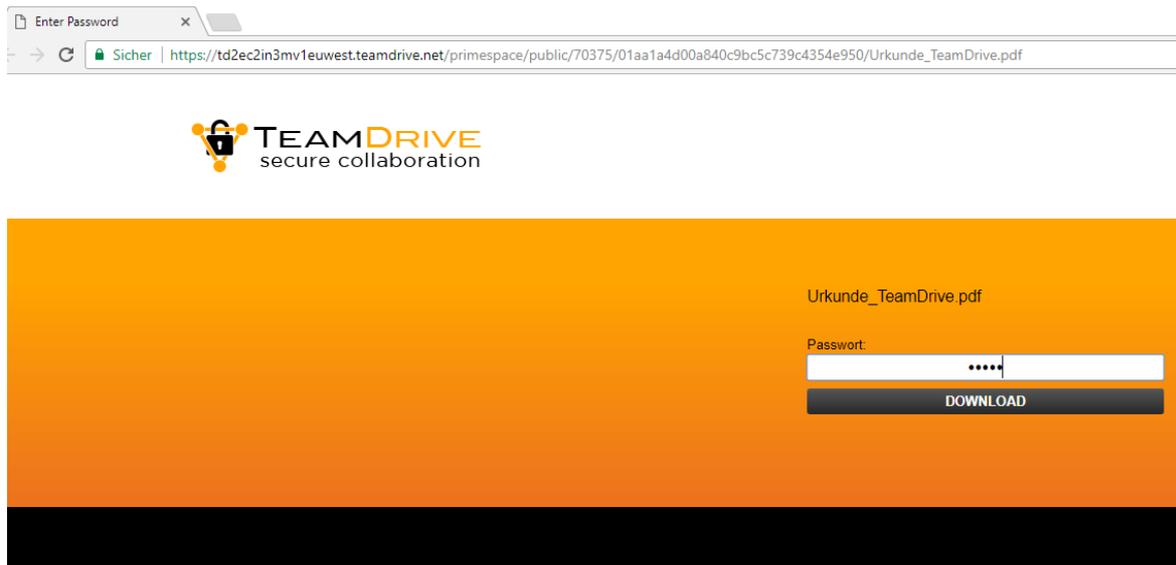
If you want to send an e-mail with an attachment, proceed as follows:

### Sending an e-mail with an attachment

1. Select **Start** → **New E-Mail**.  
*A new message window opens.*
2. Click the menu item **TeamDrive > Attach file**.  
*The Windows Explorer opens.*
3. Select a file that you want to send.
4. Confirm your selection with the Open button.
5. Change the expiration date and password if necessary.
6. the file name of the attached file is entered under Published. The file name appears in the e-mail. In the case of sensitive data, the name displayed in the e-mail can be changed by an entry in LinkTitle..
7. Click the Next button.  
*The selected file is added to the e-mail as a link.*
8. Enter a recipient and a subject and click the Send button.

## 2.7 Open an e-mail attachment

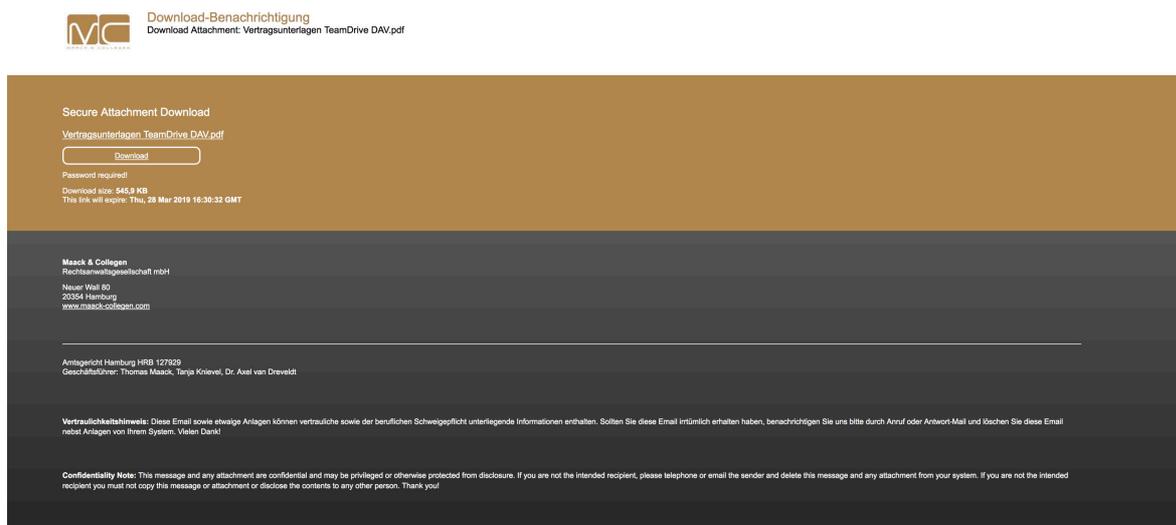
Picture 2: Open the file in a browser



### Opening an e-mail attachment using the Outlook Add-in

1. The recipient of the e-mail opens the received e-mail.  
*The e-mail contains a link with the name of the document.*
2. Click on the link in the e-mail.  
*Your default browser opens.*
3. In the Password field, enter the password you received from the sender of the e-mail.
4. Click the Download button.  
*The file will be saved in the download folder you defined or displayed directly by the browser..*

## 2.8 Changing the appearance of the download page



### Change HTML template to create a custom download page

1. You can store a customized HTML file in the Outlook Add-in. To edit the existing HTML template, download the file by choosing TeamDrive Settings>HTML Template>Export HTML Template
2. After changing the HTML file, you can import it again using TeamDrive Settings>HTML Template>Import HTML Template. Newly created attachments are displayed in the browser with the new page.
3. If you have no experience in creating HTML templates, please contact us.