

www.business-filemanager.de

THE BUSINESS CLOUD – SIMPLE, SECURE, FLEXIBLE

Extended functions described in detail.

Administrator manual



WELCOME

This manual explains in detail all functions of the browser application that are only available to administrators of the system.

If you still have any questions, please contact your IT support.

Information for IT administrators:

All contact options can be found in the support agreements stored in the quotation process.

To access the administrator functions, first log in with your administrator account (Figure 1) and then select the “Administration” item via the user icon in the upper right area of the screen (Figure 2)

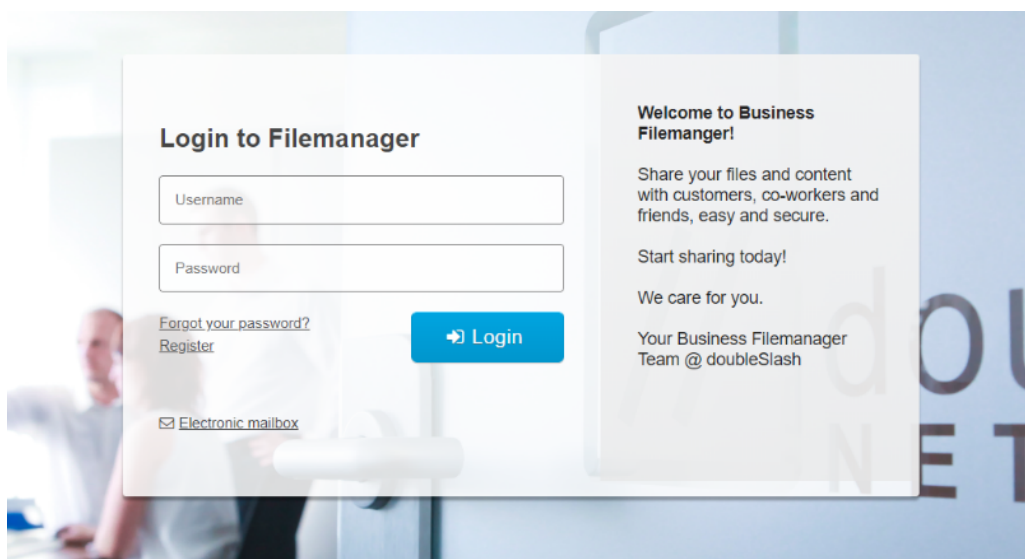


Figure 1: Administrator Login

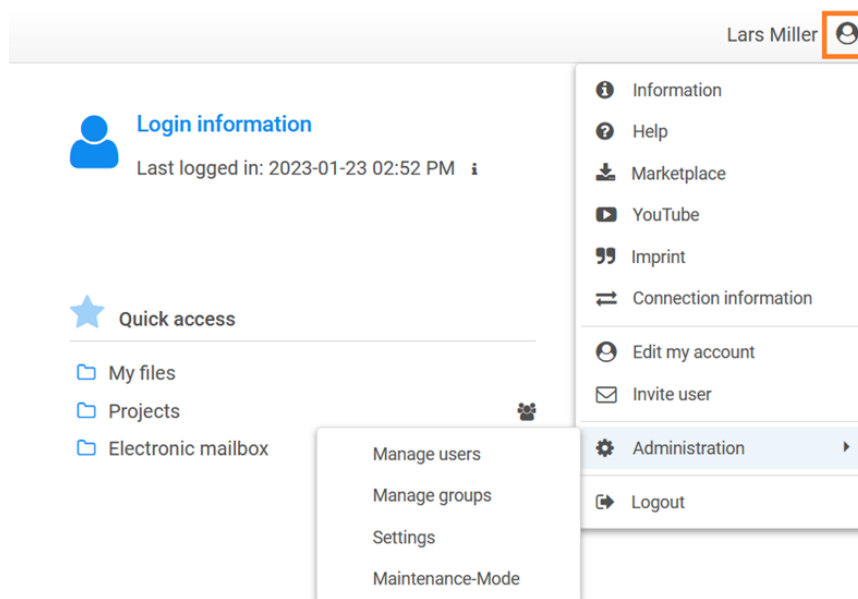


Figure 2: Select administrator function

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1 Manage users

With the administrator function “Manage users” you can create, edit, delete or assign a user to a group. An alternative procedure to these functions is described in Further groups functions.

All available users are displayed in a list. System users can additionally be displayed via the “Show system users” checkbox.

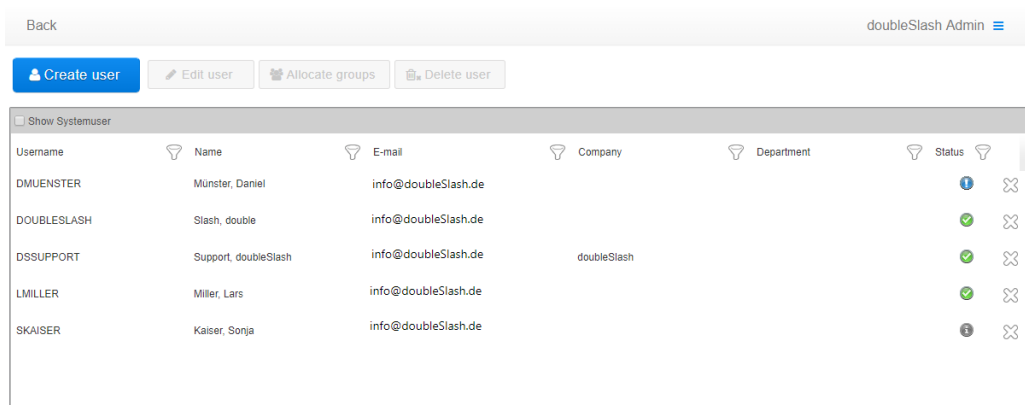


Figure 3: Manage users

You can sort the users in the list by various properties (username, name, email, company, department, status) by clicking on the name of the corresponding property. (Figure 4)

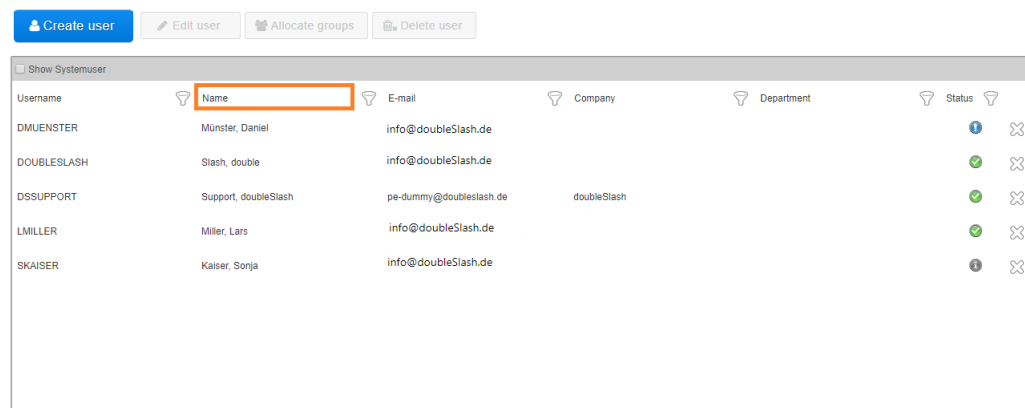


Figure 4: Sort user by various properties

You can also filter the entries according to certain criteria by clicking on the filter icon of the respective property and defining your filter. (Figure 5)

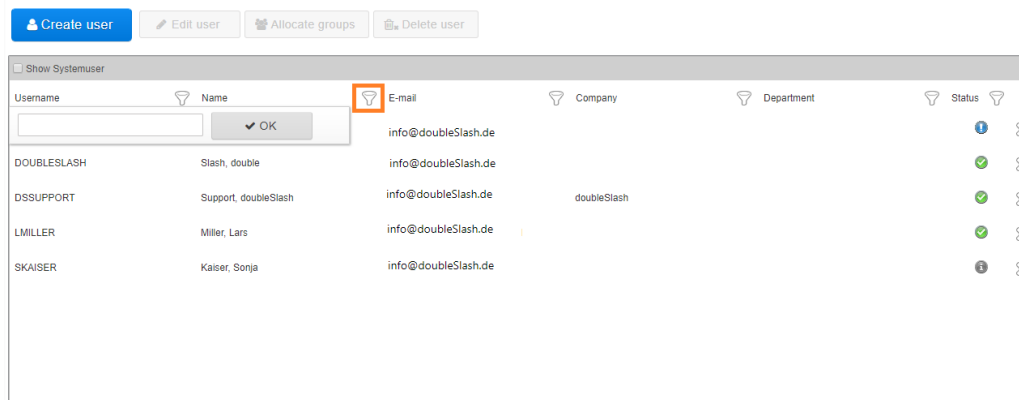


Figure 5: Filter user

For the filter status there are different categories

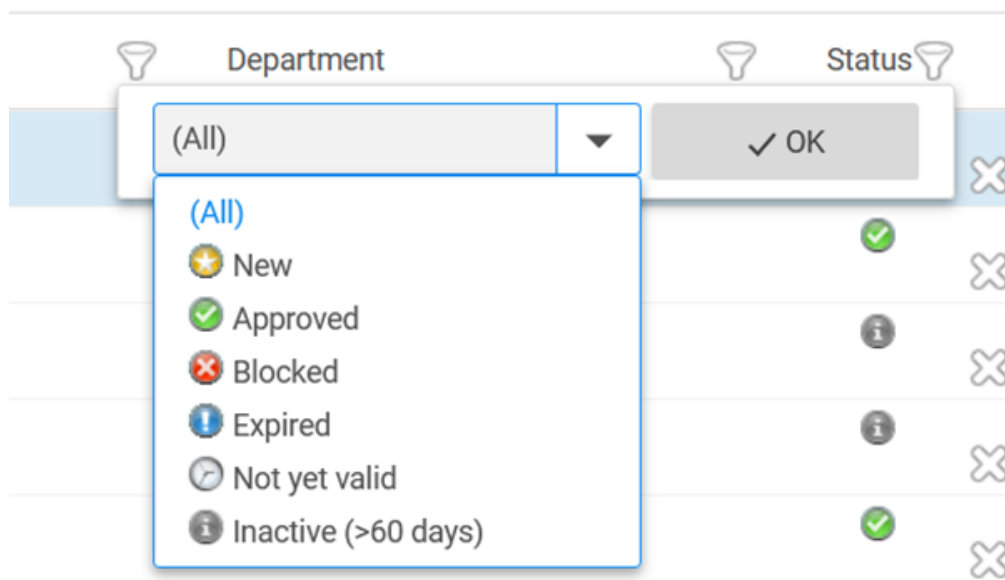


Figure 6: Filter status

The status values have the following meanings:

New	User has registered, but is not yet approved by the administrator. The user can not log in yet.
Approved	User is active.
Blocked	User has been blocked and can no longer log in (e.g. by entering the wrong password multiple times or by manual blocking by the admin).
Expired	The entered validity period has expired. The user can no longer log in.
Not yet valid	The entered validity period has expired. The user can no longer log in.
Inactive	The user has not logged in for >60 days, but can still use his account without restriction.

Table 1: Status value

1.1 Edit users

To edit a user, first select it and then click the “*Edit User*” button (Figure 7) or press the right mouse button on the corresponding entry and select “*Edit User*” (Figure 8).

To edit multiple users at once, press STRG and then select the corresponding users and choose “*Edit User*” (Figure 8).

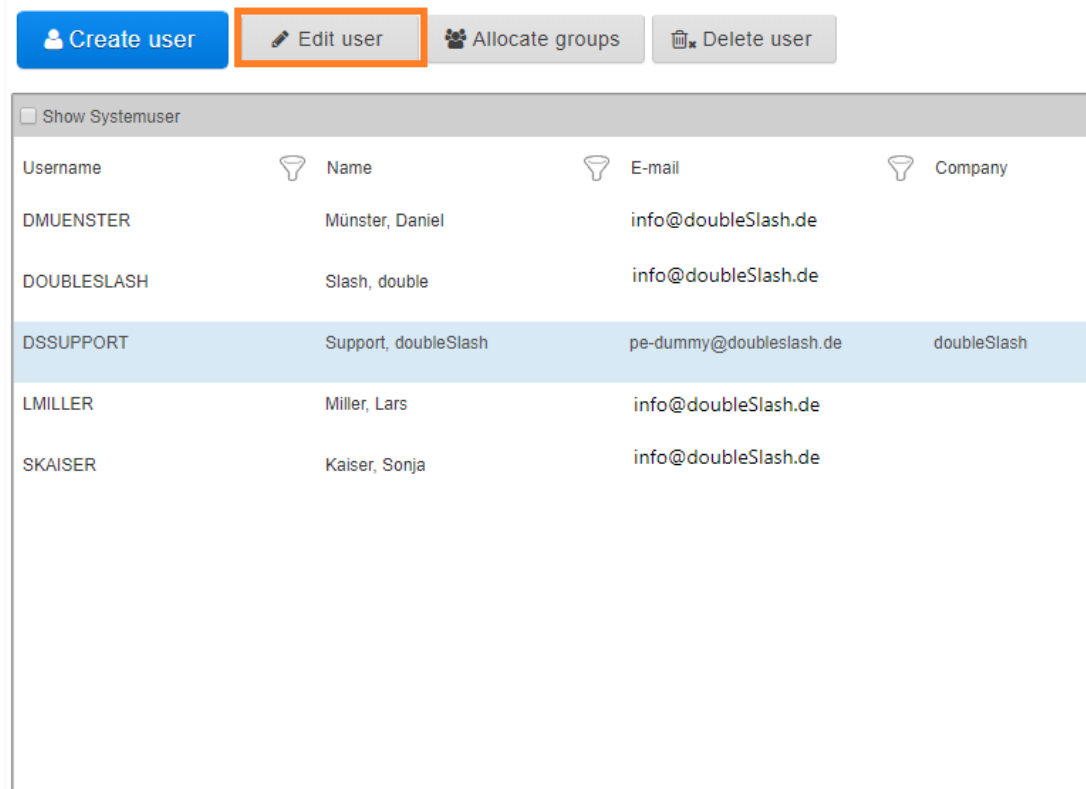


Figure 7: Edit users (1)

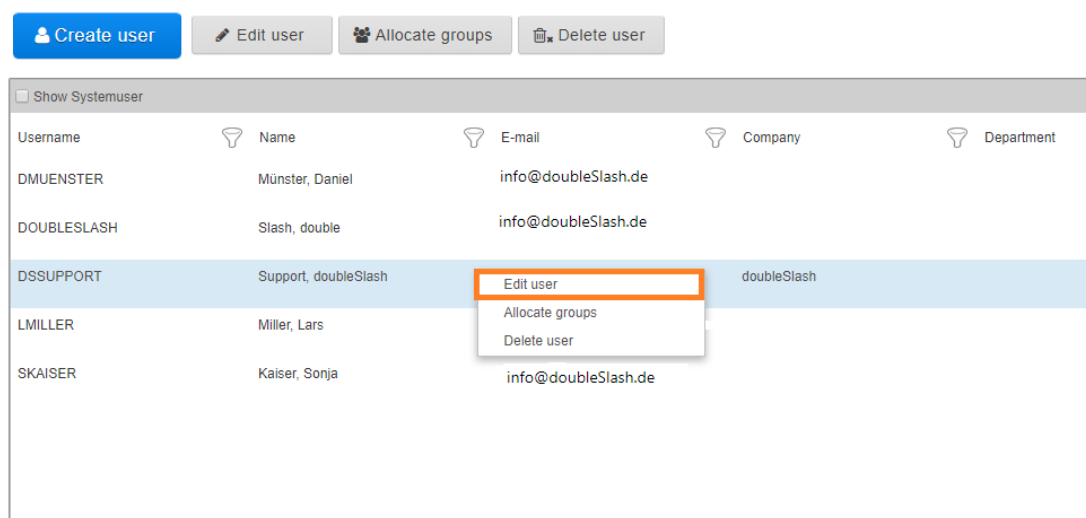


Figure 8: Edit users (2)

In the following window you now have the possibility to change the personal details (Figure 9) to block the account for a certain time, to set the validity range of the account or to authenticate via [LDAP](#) (this feature requires an LDAP connection) as well as to write a new

comment (Figure 10). To set up an LDAP connection, please contact the Business Filemanager support). The expiration date can be set individually for each user. After reaching the expiration date, the account status is set to “Expired”, so that the user cannot log in anymore.

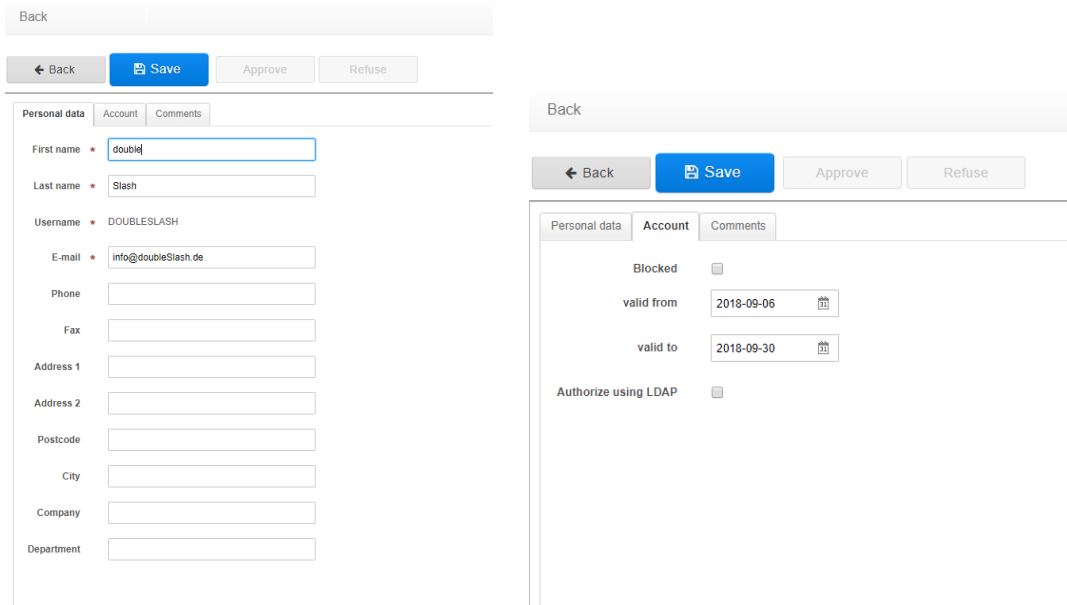


Figure 9: Personal details & Change account settings

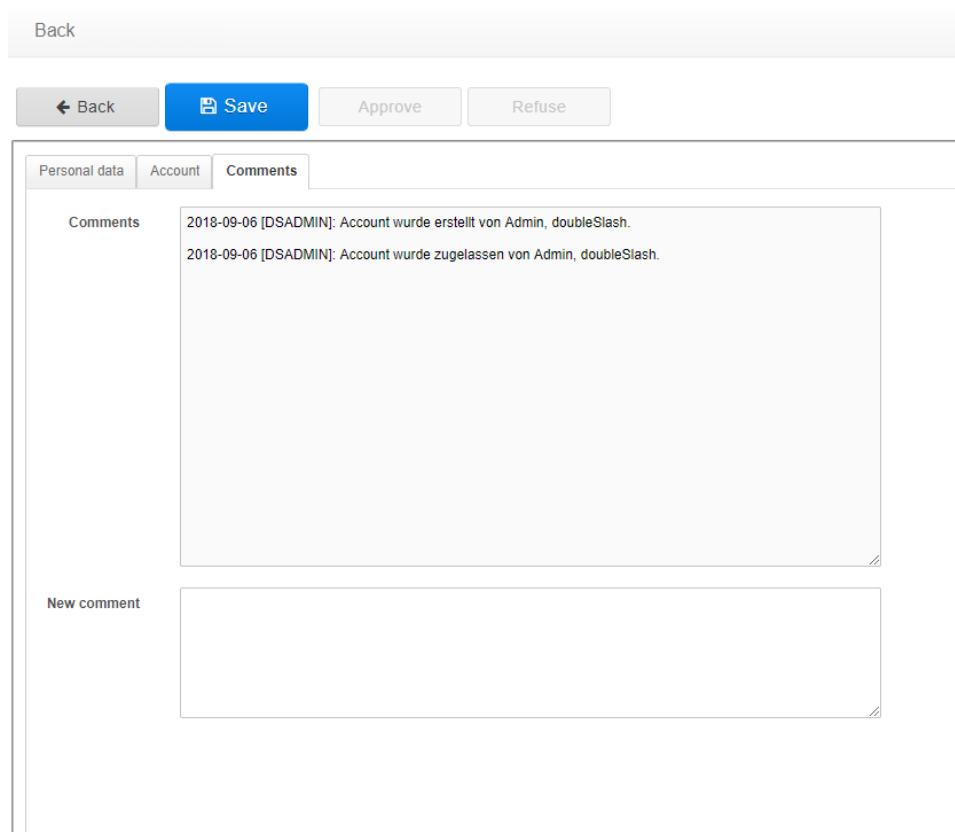


Figure 10: Write a new comment

1.2 Assign a group to users

You can assign users to one or more groups and define specific access rights for them.

A distinction is made between the three top groups Administration (users are granted administrator rights), *AllRightsGroup* (group is granted full access to files and folders) and *SystemUserGroup* (users are granted access to specific applications/rights). To create a new group, please refer to 2.1 Creating Groups.

To assign a group to users, select one or more users (hold down *CTRL* and select the corresponding users) and click the “Assign groups” button (Figure 11). Then check the respective groups and save your selection by clicking the “Apply” button (Figure 12).

Note: Groups can only be assigned by persons who have at least the Subadministrator role.

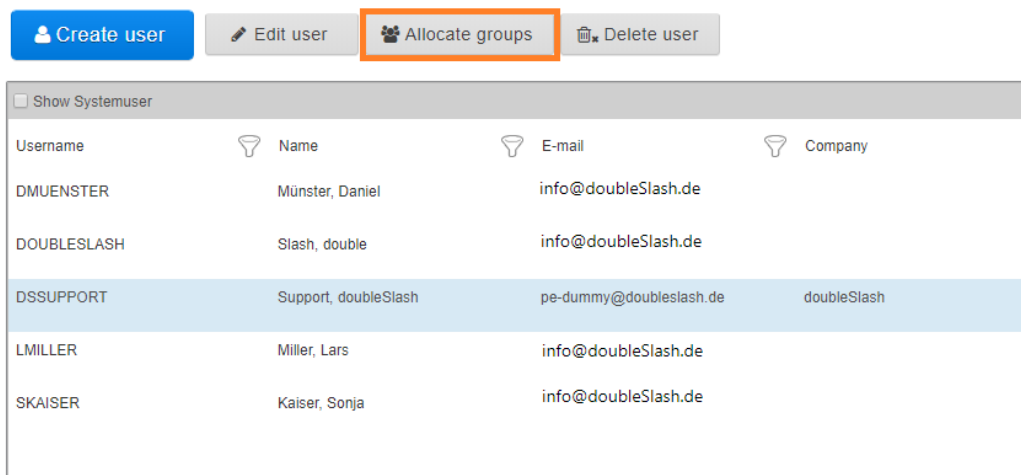


Figure 11: Assign a group to users (1)

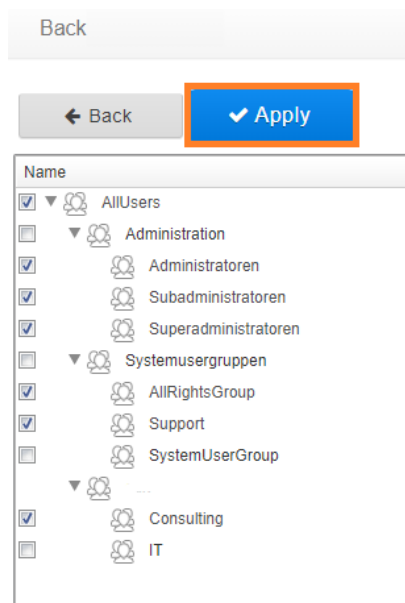


Figure 12: Assign a group to users (2)

1.3 Delete users

To delete a user, select it (hold *CTRL* to select multiple) and click the “Delete User” button (Figure 14). Alternatively, press the right mouse button and select “Delete user” (Figure 13) or click on the delete icon at the right edge of the screen for the respective user entry (Figure 15).

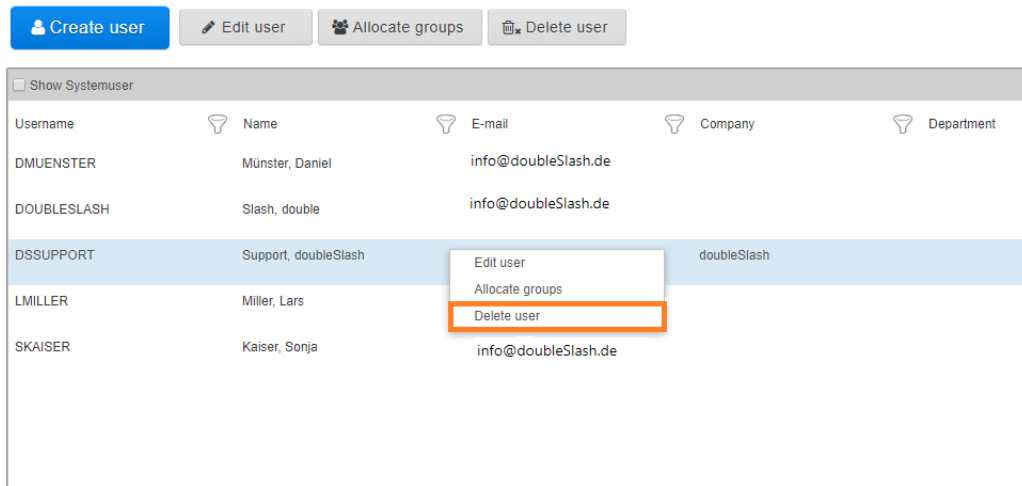


Figure 13: Delete user via right mouse button

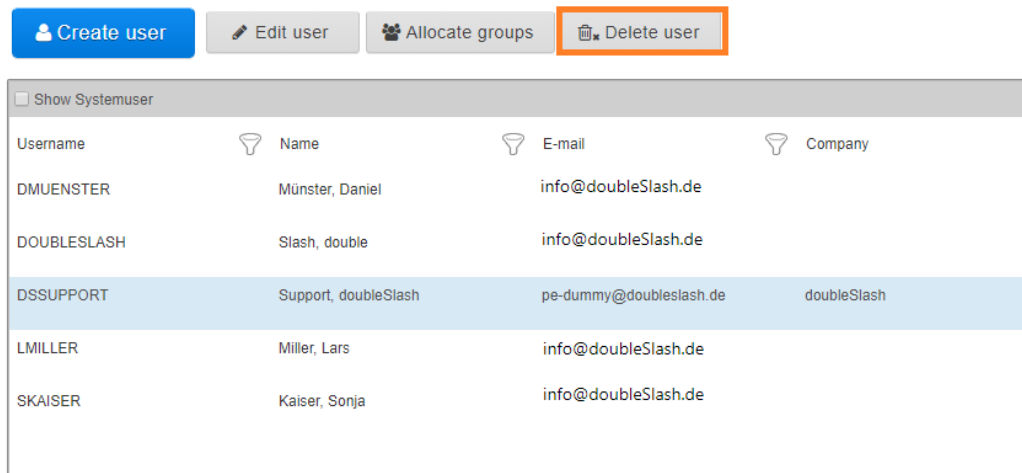


Figure 14: Delete user via button

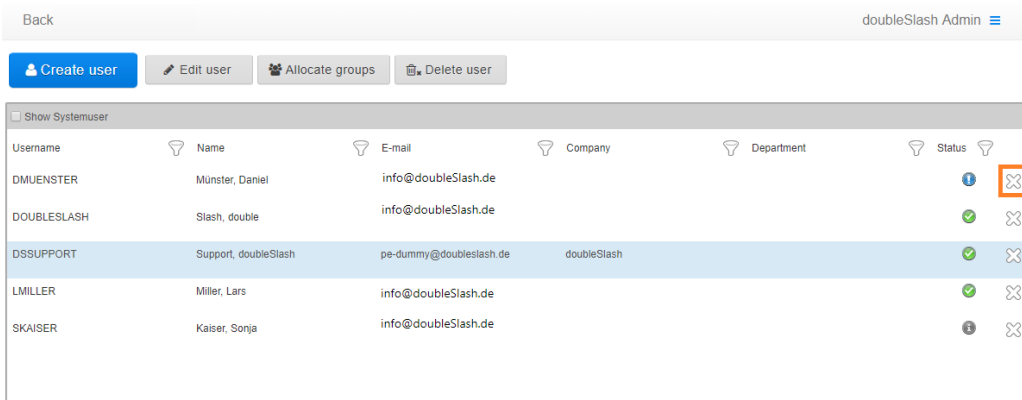


Figure 15: Delete user via delete icon

2 Manage Groups

User groups allow you to assign specific rights to multiple users at once by assigning the respective users to the appropriate group. To manage your user groups, open the menu via the user icon in the upper right area of the screen, go to “Administration” and select “Manage groups”.

All created groups are displayed in the group overview in the left area of the screen. In the delivery state, the system has an initial group structure (Figure 16). To search for specific groups, you can use the search bar provided for this purpose.

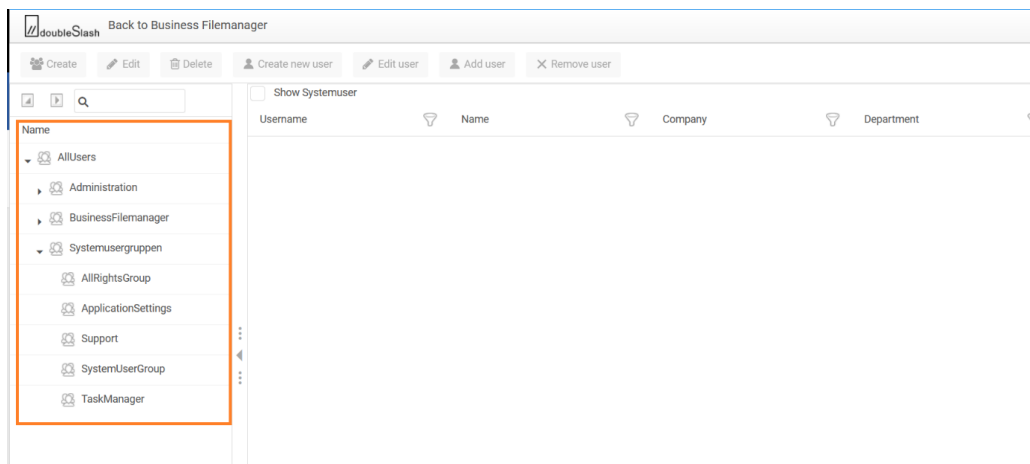


Figure 16: Overview of user groups

Note: The “Administration” group and its subgroups “Administrators”, “Subadministrators” and “Superadministrators” are fixed system groups that cannot be deleted!

The administrator groups at a glance:

- **Administrators** have access to user management, settings and maintenance mode.
- **Subadministrators** are users who are allowed to call group administration.
- **Superadministrators** have full access to the system and see the content of other users.

2.1 Creating Groups

To create a new group, first select the parent group and then click the “Create” button (Figure 17) or press the right mouse button and select “Create group” (Figure 18). We recommend that you always create new groups under the “Business Filemanager” group.

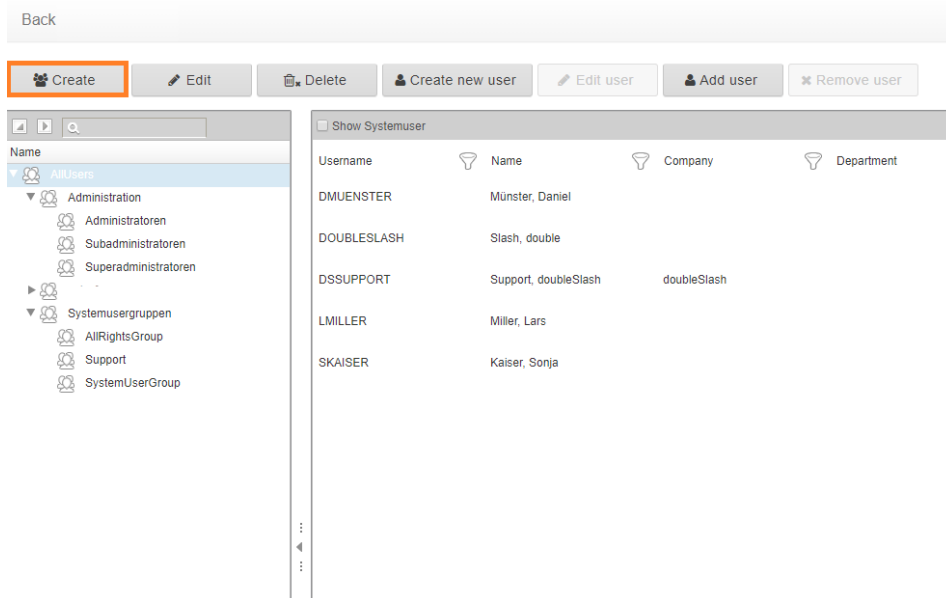


Figure 17: Create group (button)

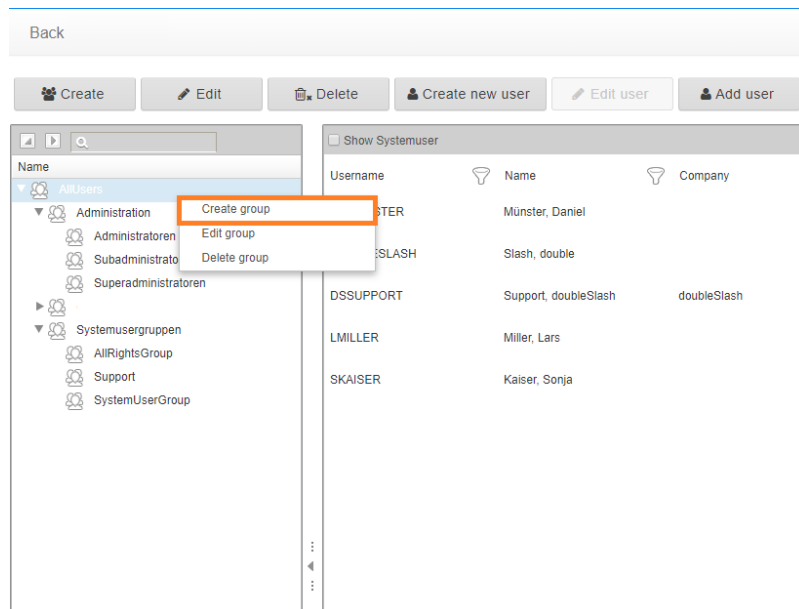


Figure 18: Create group (right mouse button)

In the following window under the “Properties” tab (Figure 19), you assign the group name and can add a description of this group, which is then displayed as a tooltip. You can also define the sub-administrators of this group. However, these will only receive group authorization once they have been added to the “Subadministrators” group below the administration groups.

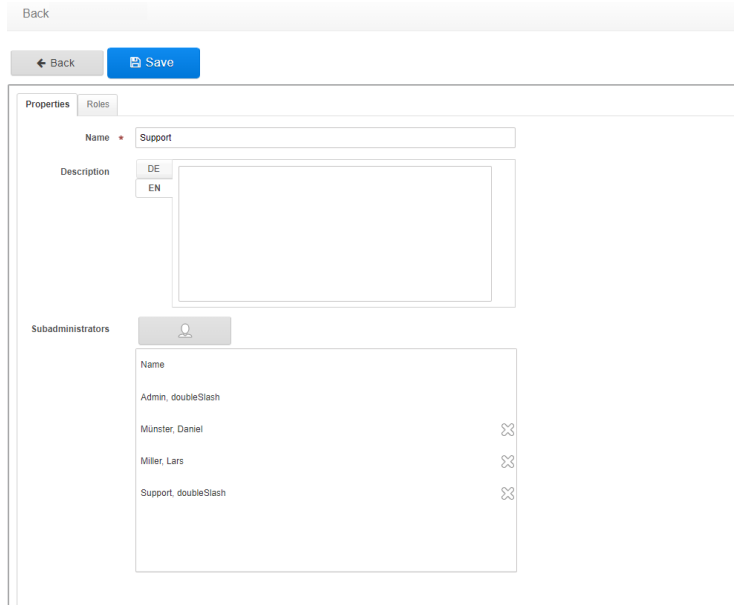


Figure 19: Define group properties

Under the “Roles” tab (Figure 20), you can assign various roles to the group and thus determine the rights of this group.

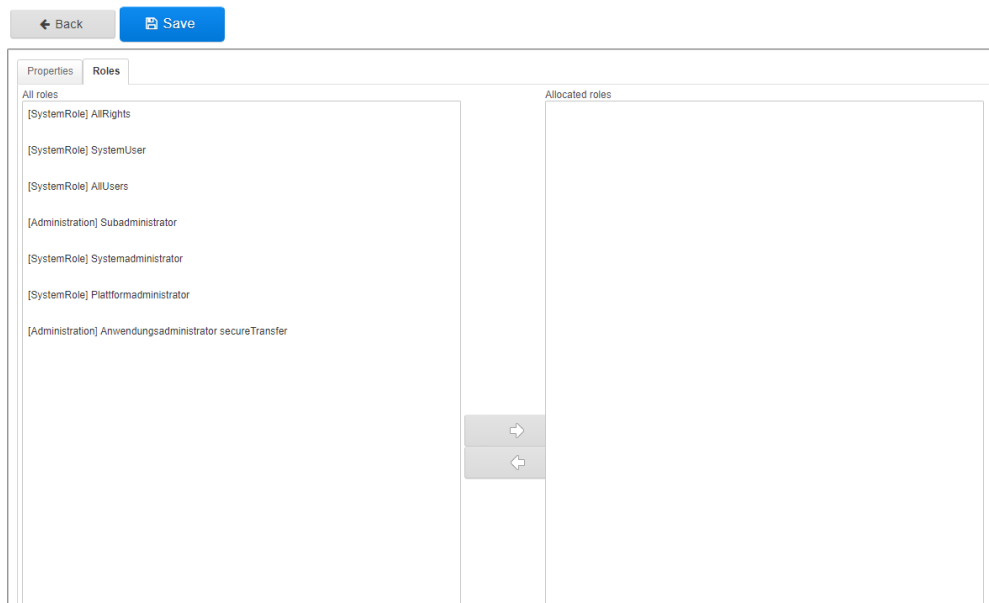


Figure 20: Assign roles to the group

Below you will find an overview of the different roles and their rights:

System administrators have all rights. They are responsible for setting up and configuring the system for operation. They are subject to the complete technical administration with sophisticated expert dialogs. A system administrator manages users, roles, rights, groups, master data and menus. He or she also has basic administration rights within the applications. System administrators may:

- manage users
- manage groups
- make settings

- Set maintenance mode
- Access and edit the complete folder structure of all users and thus also access Workspace (projects).

Note: In the case of the “SaaS” hosting method, this role is assumed by the service provider (doubleSlash).

Platform administrators assign access and enable users for various applications. They have limited access and may:

- Manage users
- Manage groups
- Make settings
- Set maintenance mode

Subadministrators of a group have restricted access and are allowed to:

- Manage the respective groups

AllRights users have full access to all functions and data and may:

- Manage users
- Manage groups
- Make settings
- Set maintenance mode

AllUsers do not have access to administrator functions. They represent the default user and are allowed to:

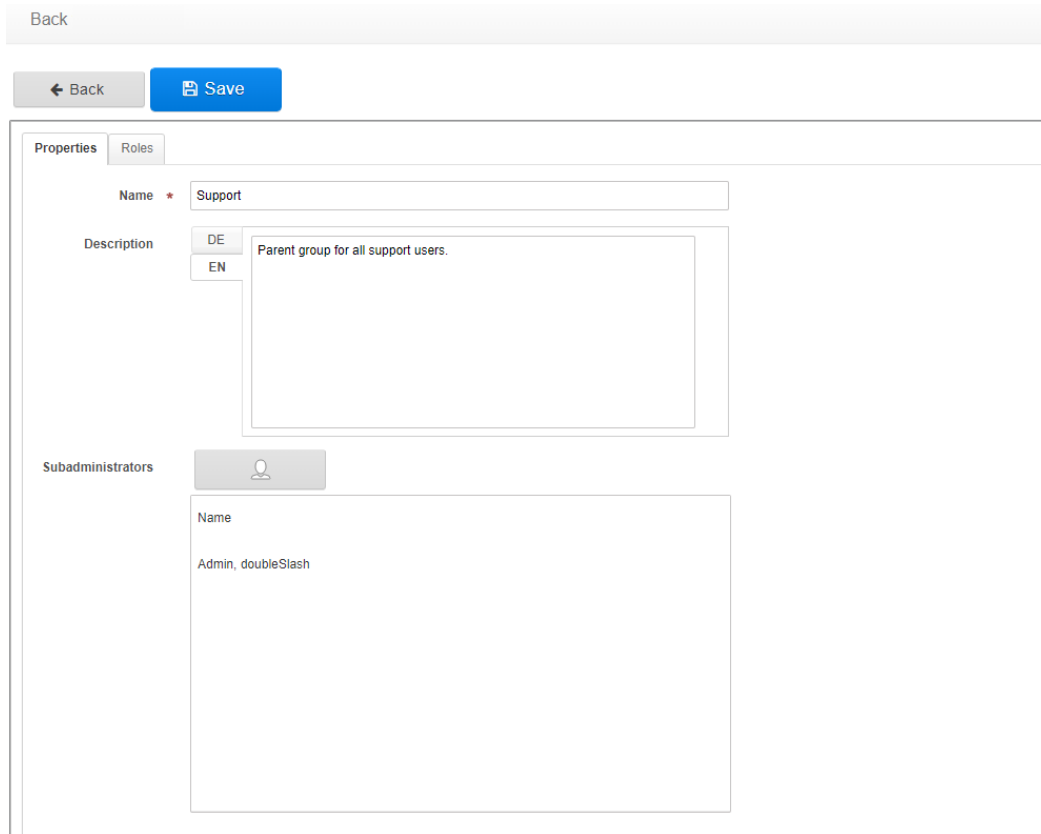
- Access and edit their own folder structure

SystemUsers have limited access and are allowed to:

- Manage groups
- make settings
- Set maintenance mode

2.2 Edit groups

Analogously to creating a group, you can also edit it. To edit a group, select the corresponding group and click the “*Edit*” button or press the right mouse button and select “*Edit group*”. The same window will open as when you create a group.



Back

Back Save

Properties Roles

Name * Support

Description

DE EN

Parent group for all support users.

Subadministrators

Name

Admin, doubleSlash

Figure 21: Edit groups

2.3 Delete groups

To delete a group, first select the corresponding group from the group overview and then click the “Delete” button (Figure 22) or press the right mouse button (Figure 23) and select “Delete group”. Confirm the deletion process in the following pop menu.

Attention: If you delete a parent group, all its subgroups will be deleted as well!

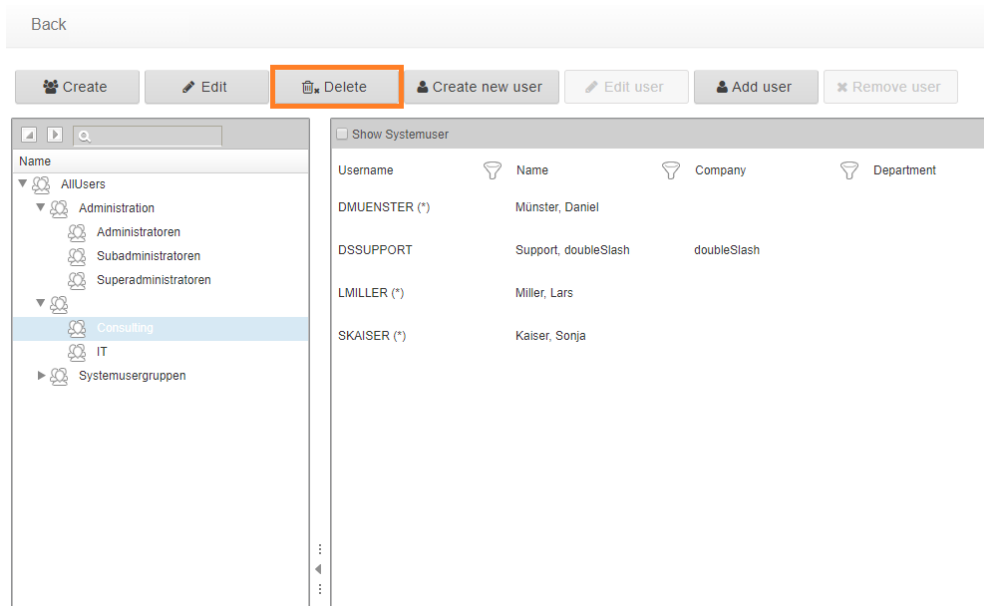


Figure 22: Delete groups (button)

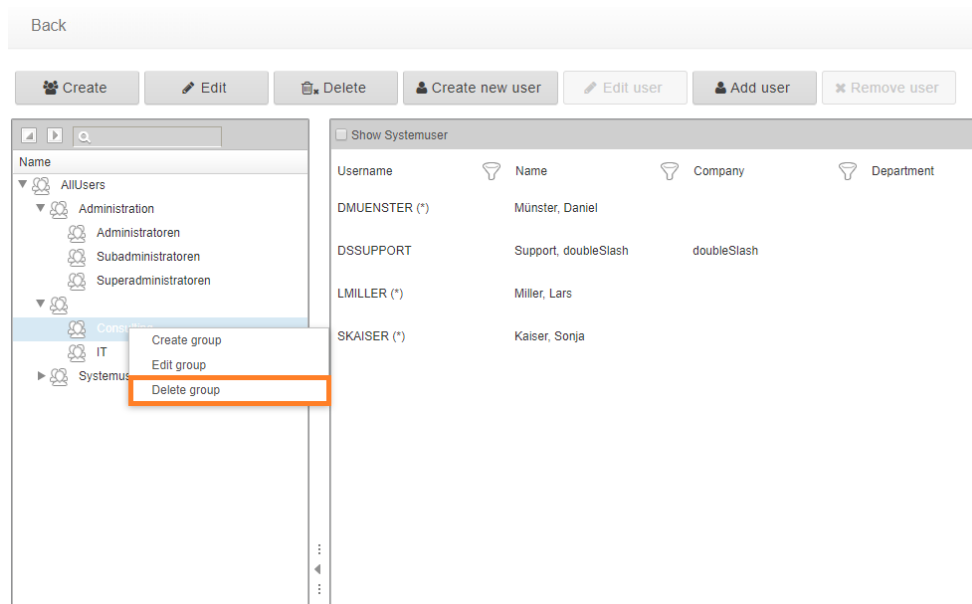


Figure 23: Delete groups (right mouse button)

2.4 Further groups functions

In addition to the group functions already described, the functions “*Create new user*”, “*Edit user*”, “*Add user*” and “*Remove user*” are also available. These functions are already described in Chapter Manage users, but can alternatively be used here.

To add a user to a group, first select the corresponding group and then click on “*Add user*” (Figure 24). Then select the respective users (hold Ctrl to select multiple) and confirm your selection with “*Save*” (Figure 25).

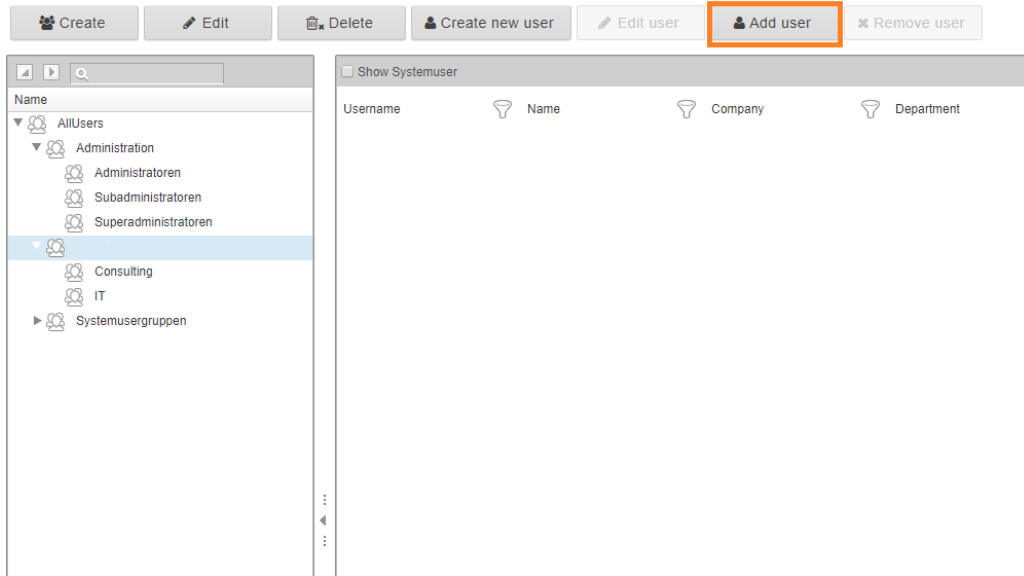


Figure 24: Add user (1)

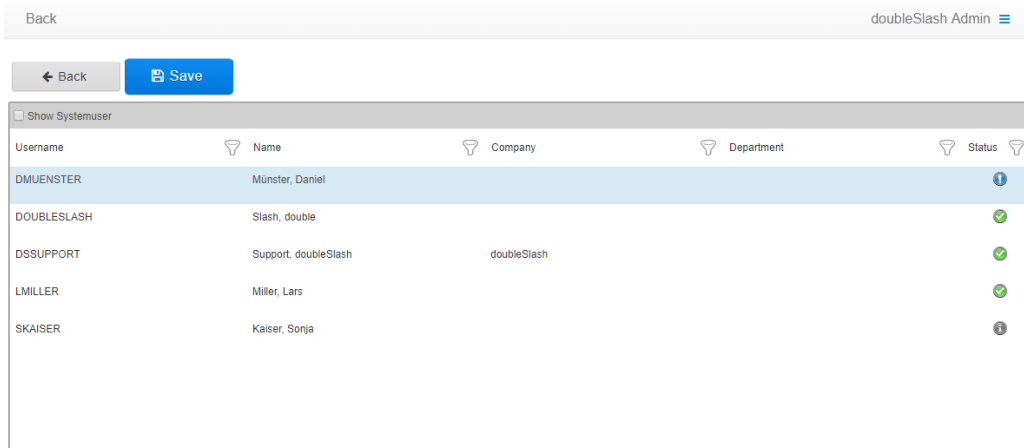


Figure 25: Add user (2)

3 Configurations

This chapter describes the administrator settings. To do this, open the menu via the user icon in the upper right area of the screen, select “Administration” and then “Settings”. Via the “Back to <your application name>” button, you can return to the main area at any time and thus discard your changes

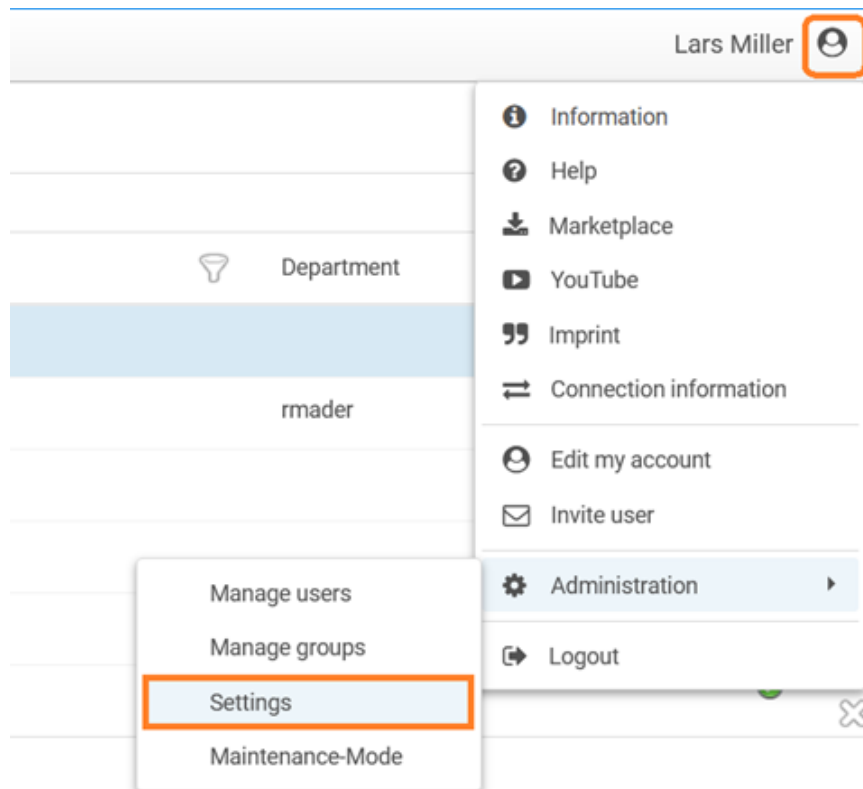


Figure 26: Call settings

3.1 General configurations

Here you can

- set the number of days after files are finally deleted from the recycle bin.
- the permissions, whether an email should be sent after new permission assignment.
- Customize the application name
- customize the logo and favicon

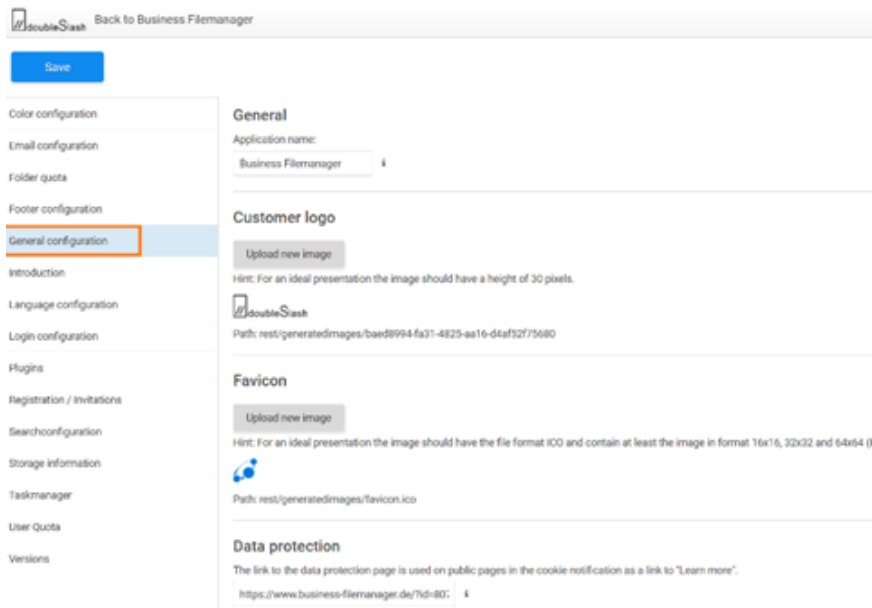
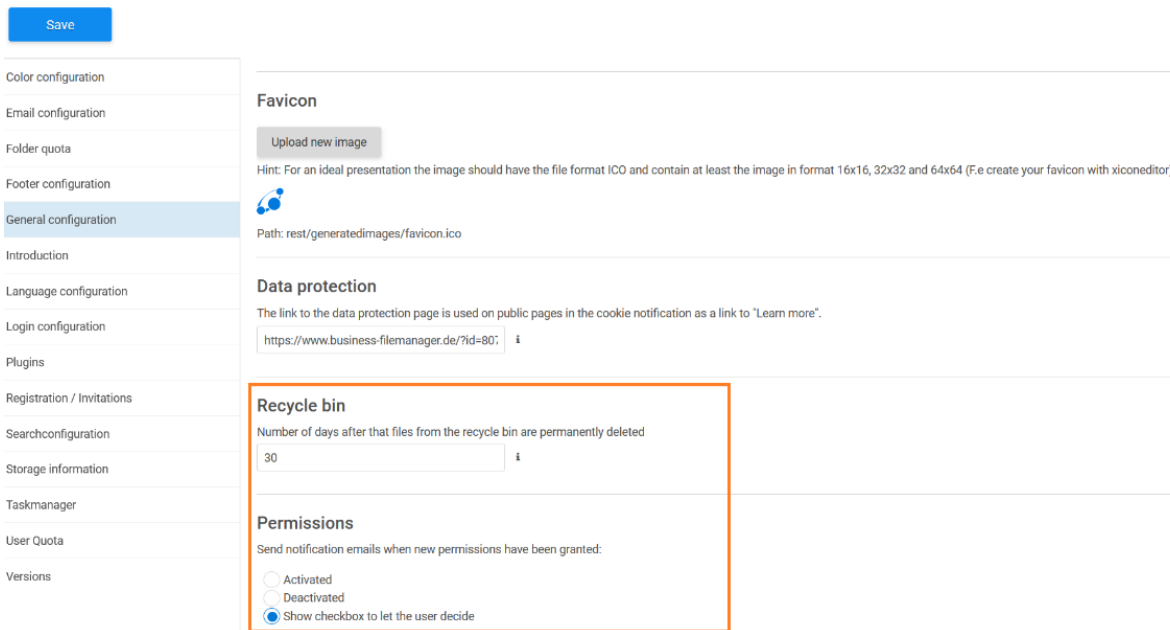


Figure 27: General configurations



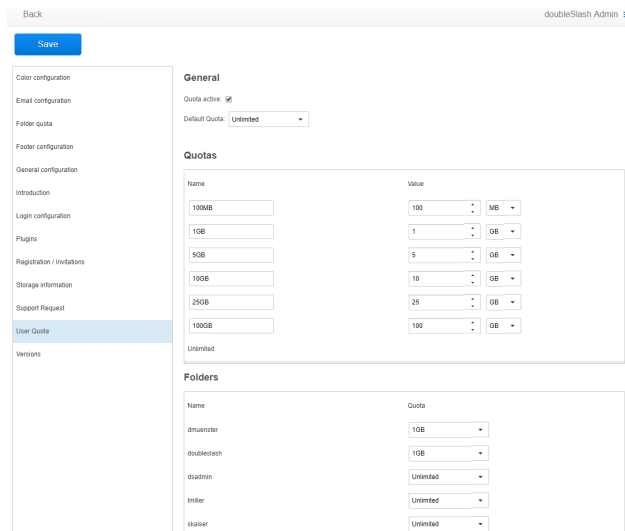
To apply your changes, click “Save”.

Note: If you do not have the Branding Plugin installed, you will only find the settings for the recycle bin and permissions in the general configuration area.

3.2 User quotas

User quotas allow you to define your own storage space, which you can make available to your users. To enable user quotas, place a check mark next to “Quota active”. *If this function is not activated, no quota will be set. The user quota allows you to assign storage locations to users in the “My Files” area.*

Note: For the allocation of storage spaces under “Projects” please use the Folder quota Plugin

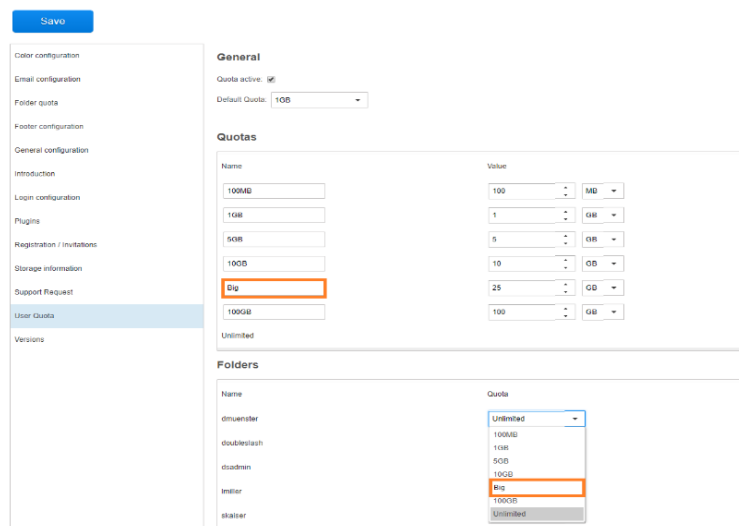


Name	Value
100MB	100 MB
1GB	1 GB
5GB	5 GB
10GB	10 GB
25GB	25 GB
100GB	100 GB
Unlimited	

Name	Quota
dmuender	1GB
doubleSlash	1GB
dadmin	Unlimited
imiler	Unlimited
staiser	Unlimited

Figure 28: User quota (1)

To define a quota, first select a name for your quota under “Quotas” and then select the storage space you want to allocate for this quota.



Name	Value
100MB	100 MB
1GB	1 GB
5GB	5 GB
10GB	10 GB
25GB	25 GB
100GB	100 GB
Unlimited	

Name	Quota
dmuender	Unlimited
doubleSlash	1GB
dadmin	1GB
imiler	1GB
staiser	1GB

Figure 29: User quota (2)

Example: You assign the name “Large” to the quota and assign it the storage value 50 GB. Then click on “Save”. If you now assign the quota “Large” to a user (you may have to exit and re-enter the “User Quotas” area beforehand in order to apply the changes), you thus assign 50 GB of storage space to this user.

You can also assign a default quota to new users via the “Quota active” checkbox.

3.3 Initial configurations

Here you can make settings for the configuration after your login:

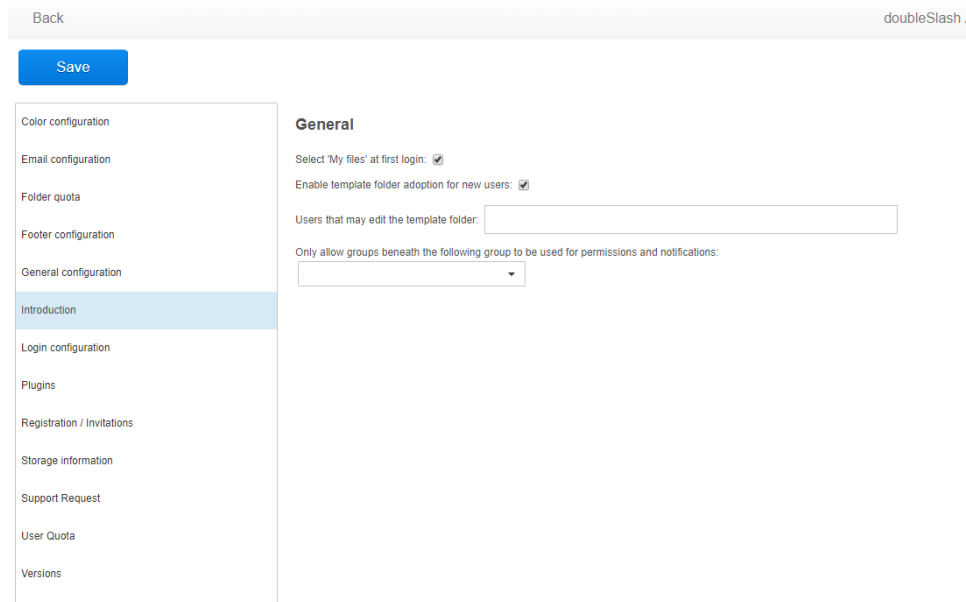


Figure 30: Introduction configuration

- If you want to store templates in “My files” for new users by default, select “Copy template folder for new users”. The users can then delete them if they do not need them. The respective users can be authorized to edit the template contents.
- You can allow only certain groups to be authorized and notified by selecting the appropriate parent group from the drop-down menu. Thus, only all of this child group permissions and notifications can be selected (Edit groups)
 - If the setting is not changed, only groups under the “BusinessFilemanager” group can be authorized to folders.

4 Individual branding

The visual and functional adaptation in the look & feel of your company creates trust and user acceptance. The Business Filemanager can be customized according to your CI requirements and thus fits perfectly into your landscape.

As part of the basic branding package, we provide you with the branding plugin as well as instruction documents for independent customization. If you have any questions, please do not hesitate to contact us. For more information about the Basic Branding plugin, please refer to 7.1.1 Individual branding.

5 Maintenance mode

From time to time the need arises to maintain the system. If this is the case, you can use the maintenance mode for this purpose. During this time, the system is inaccessible to all other users (except for authorized administrators).

To activate the maintenance mode, open the menu via the user icon in the upper right area of the screen, go to “Administration” and select “Maintenance mode”.

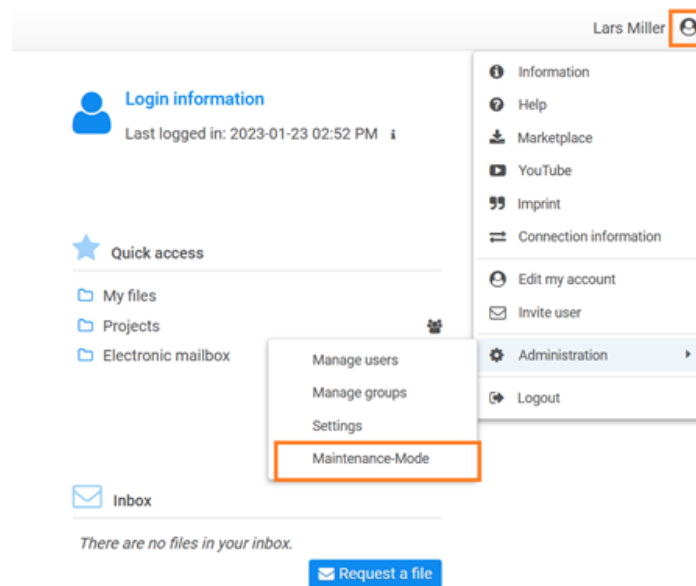


Figure 31: Maintenance mode

You can then activate maintenance mode *manually* (immediately and up to a certain time) or *automatically* (from time to time).

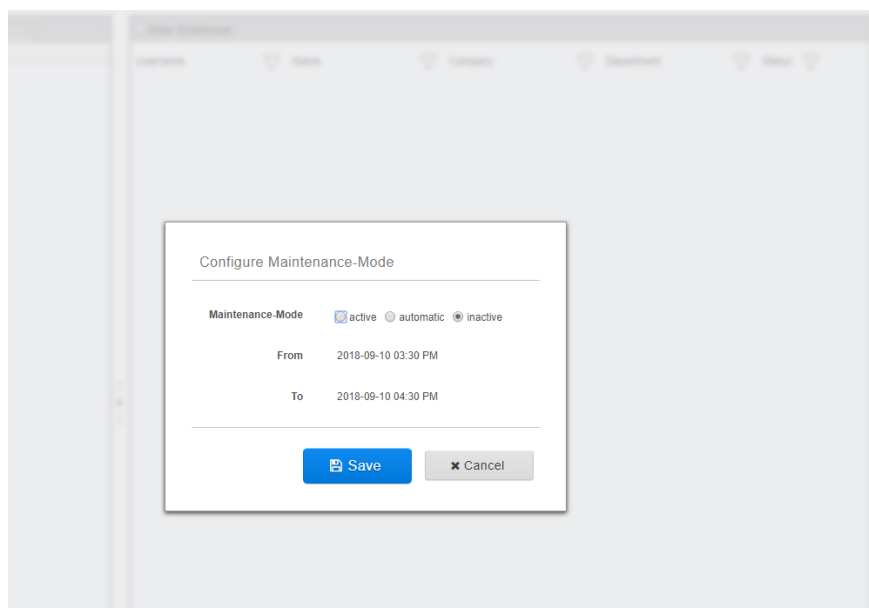


Figure 32: Activate maintenance mode

6 Create project folders and adjust permissions

Working with colleagues and business partners on a joint project is very easy in “Business Filemanager” thanks to special data spaces - so-called workspaces. This allows you, for example, to create specially marked directories for a new project, which a team or business partner can access at any time and from anywhere.

To assign different permissions for the “*Projects*” folder, you must be logged in as an administrator with the *Super Administrator* role. You can access the “*Customize Permission*” icon in the dashboard at access (Figure 33). For more information on the permissions process, please refer to the User Guide in Chapter 4.1 “Permitting Users/User Groups”.

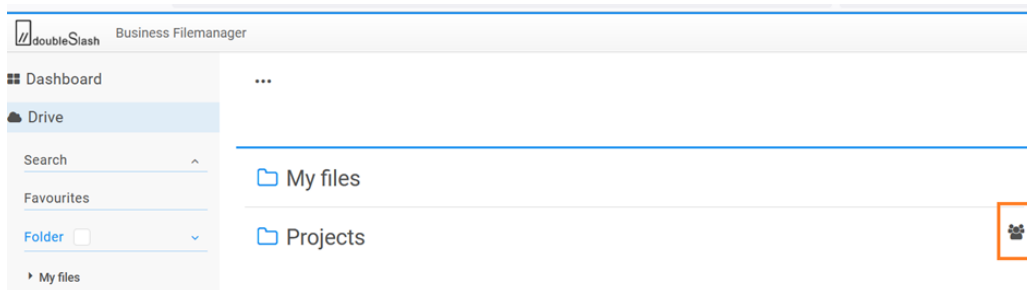


Figure 33: Customize permissions

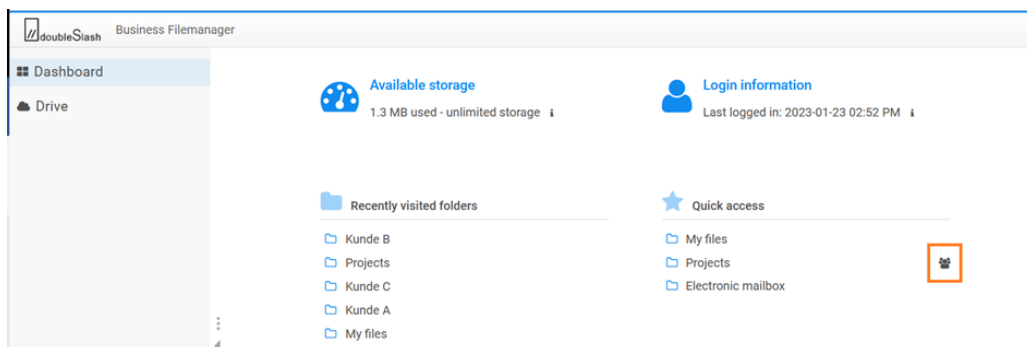


Figure 34: Customize permissions via dashboard

To create a new project folder as an administrator, you must have previously been given the “*Edit*” permission by a **super administrator**. For the project folders for which he is authorized (“*Edit*”), he can create subfolders, but not new project folders.

In the Drive view, first click on the “*Projects*” folder (this must first be enabled by a *super administrator*) and then click on “*Create folder*”. You can now grant the new folder access for other users as usual via the “*Authorize*” button ().

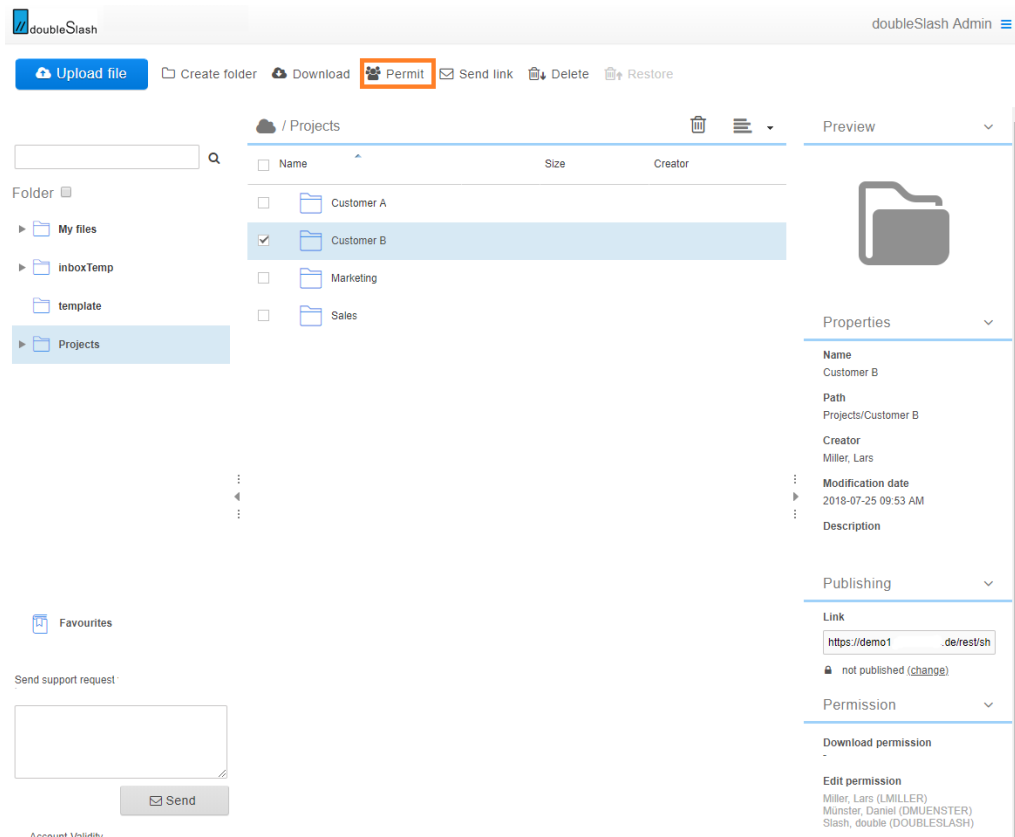


Figure 35: Release a project folder

7 Plugins

The plugin system allows you to extend the functionality of your Business Filemanager application with different plugins. All currently available plugins can be found at

<https://www.business-filemanager.de/marketplace/>

and make inquiries.

7.1 Plugin Installation

To manage your plugins, open the “*Plugins*” item in the settings area. There you will now see all installed or activated plugins.

If you want to add a plugin, select “*Install plugin*” (Figure 36) and open the corresponding plugin (.zip file) (Figure 37). After installing a plugin, it will initially appear under the “*Installed*” item. To activate it, select “*Activate*”. (Figure 38)

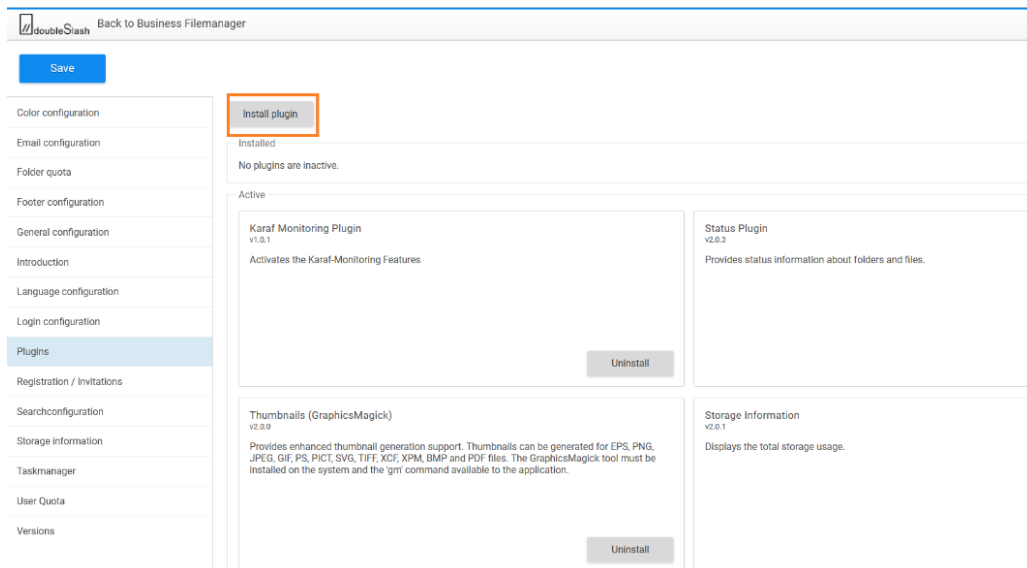


Figure 36: Install plugin (1)

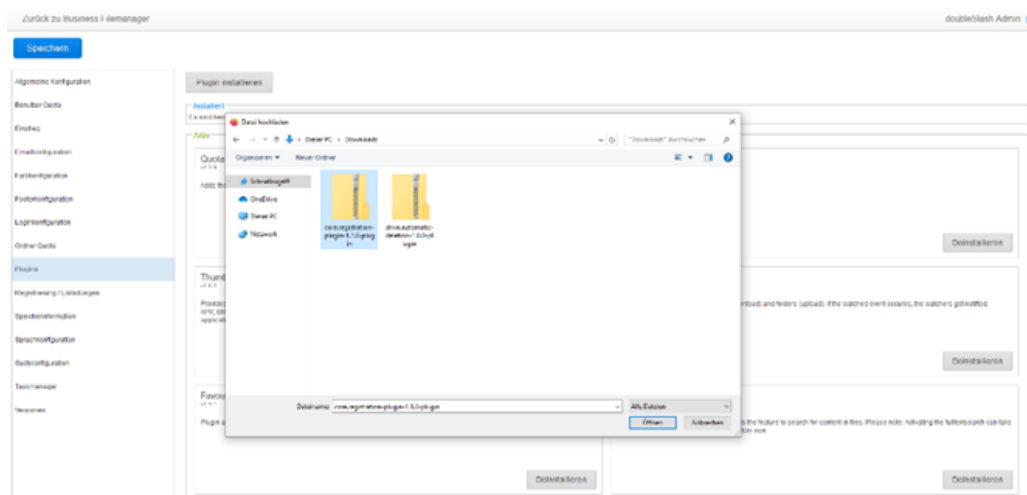


Figure 37: Install plugin (2)

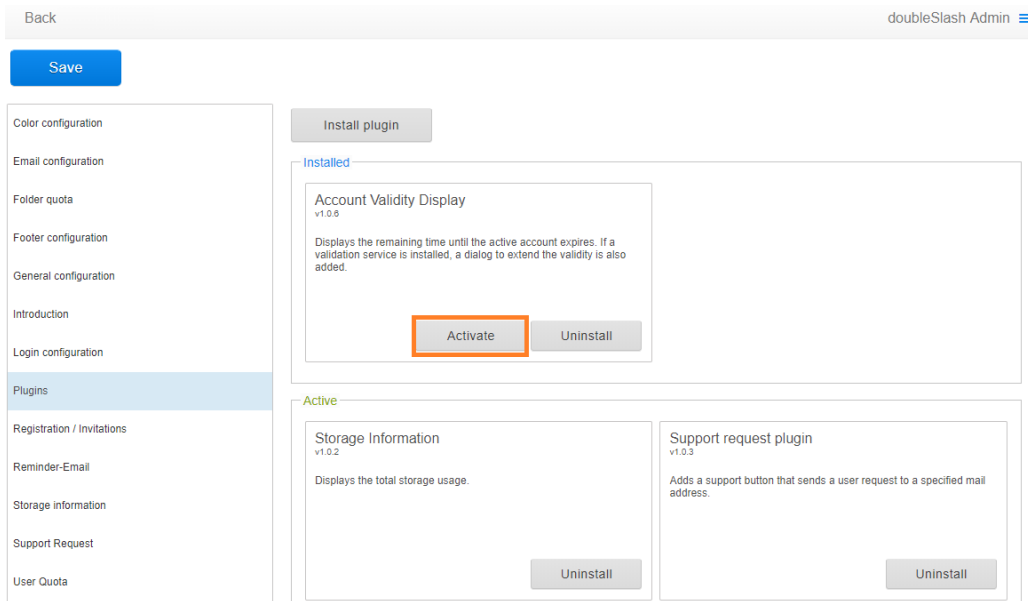


Figure 38: Install plugins (3)

To remove a plugin, click on “Uninstall” for the respective plugin

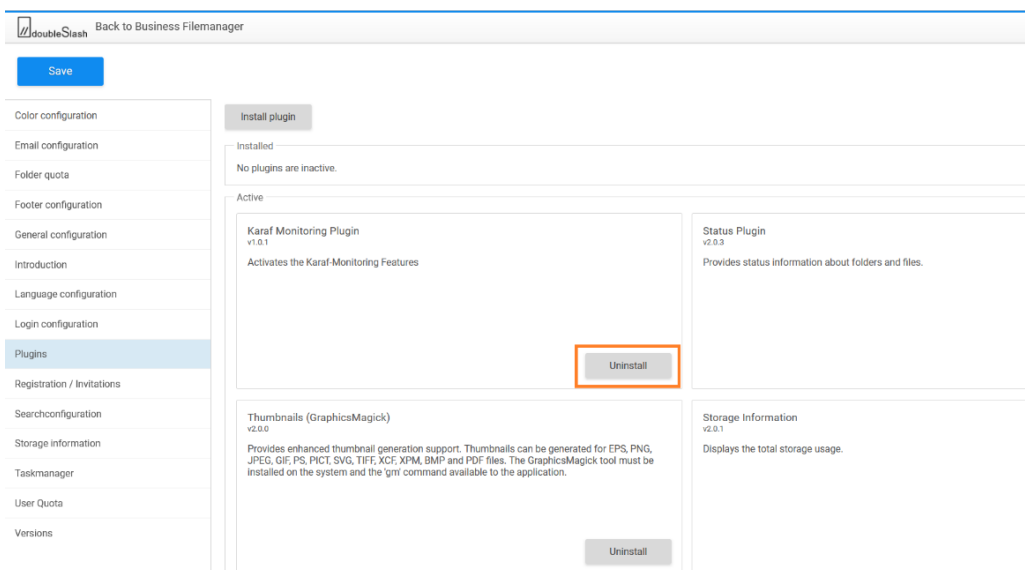
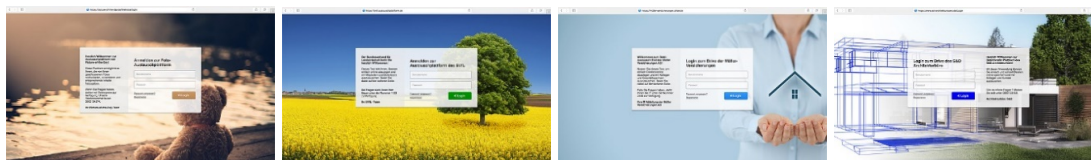


Figure 39: Uninstall plugins

7.1.1 Individual branding

Within technical constraints, the following customizations and changes can be made as part of the Basic Branding Package:

- Change of application name from Business Filemanager to one chosen by you.
- Change of complete colour scheme, headers, fonts, buttons, selections, etc.
- customization of greeting texts, login messages
- Changing the background image on the login page
- Exchange of the logo
- Exchange of the fav icon
- Customize footer menu in public area



Extended branding or customizing on a larger scale is also possible. This includes e.g. advanced theme customizations, whitelabeling of apps & clients, email texts and functional extensions and customizations.

Ask us about the possibilities.

7.1.2 Registration plugin

Registration plugin simplifies collaboration among employees and with customers or partners. It offers users the possibility to invite external people to use Business Filemanager.

The plugin enables additional ways to create user accounts:

- **Invite** (See user manual)
- **Authorize to a folder:** If someone without a user account is authorized to a folder, the system can automatically send an invitation to this user. If the invitation is accepted, the recipient has a valid account with permission to the shared folder.

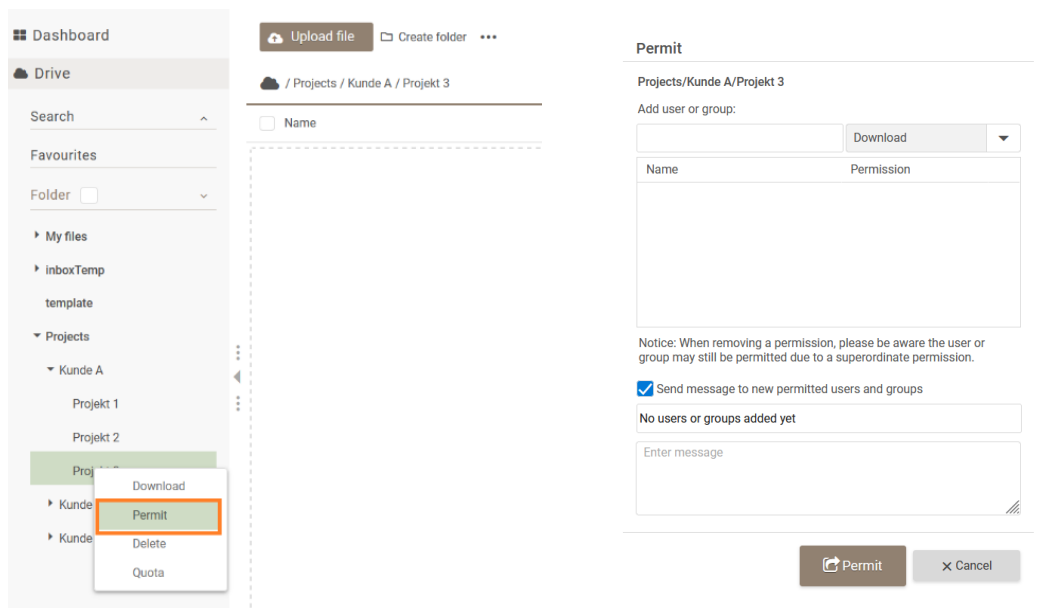


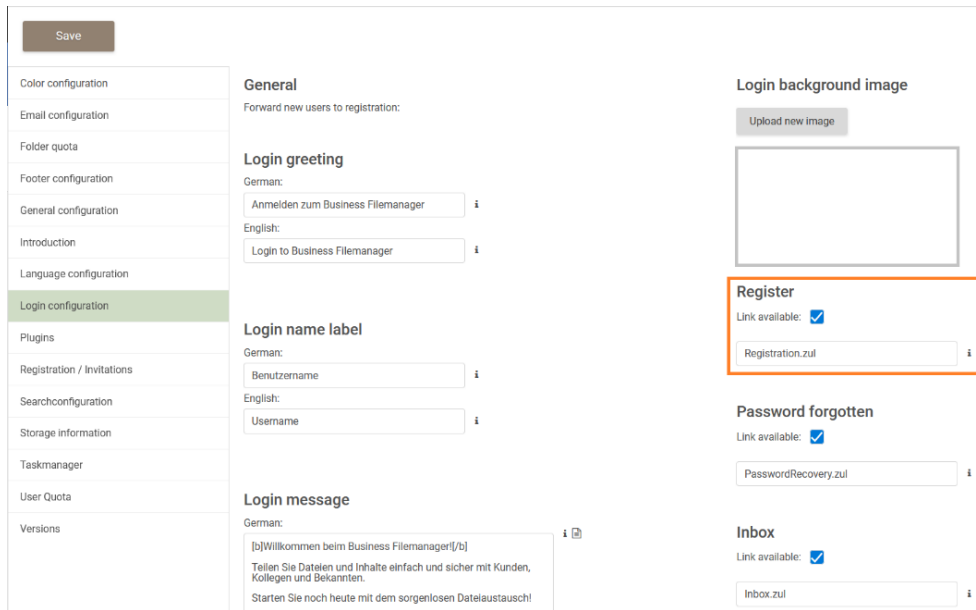
Figure 40: Permissions on a folder

The settings for the Registration plugin are located in the settings under “Registration / Settings”. This setting item is only available if the Registration Plugin is installed. Here you can configure the functions for registering and inviting users.

You can make the following changes to the registration functions:

- Enable or disable registrations. (Figure 41)
- Use the email address as the login name.
- Determine the validity period of the registration.
- Automatically approve newly registered users.
 - Enabled: User registers and can log in immediately, without activation by the administrator.
 - Deactivated: User registers, administrator receives an email to unlock the user. Until activation by the administrator, the user cannot log in yet.
- Change the process display during the registration process.
- Change the button name to complete registration.
- Specify users to be notified about registration.

- Assign users to specific groups after registration.



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General
Forward new users to registration:

Login greeting
German: Anmelden zum Business Filemanager
English: Login to Business Filemanager

Login name label
German: Benutzername
English: Username

Login message
German: [b]Willkommen beim Business Filemanager![/b]
Teilen Sie Dateien und Inhalte einfach und sicher mit Kunden, Kollegen und Bekannten.
Starten Sie noch heute mit dem sorgenlosen Dateiaustausch!

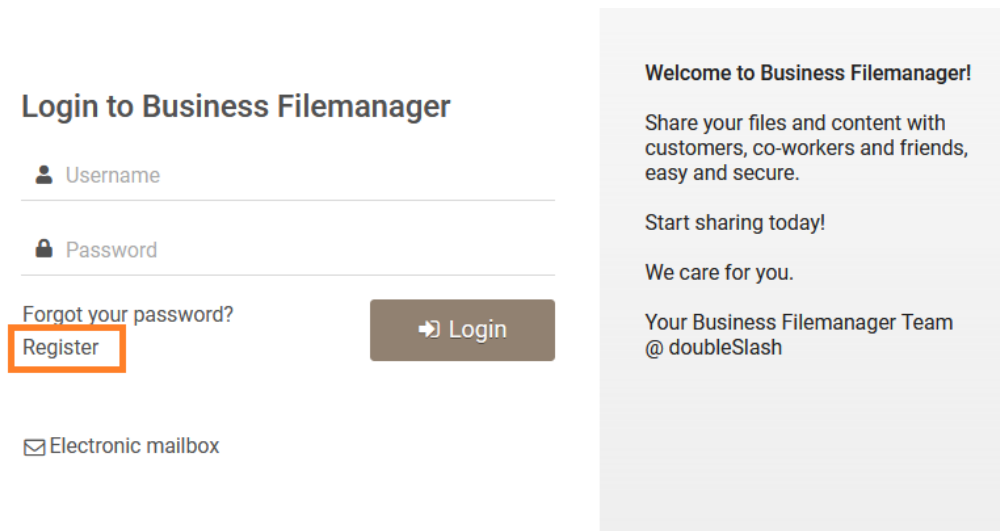
Login background image
Upload new image

Register
Link available: ☒
Registration.zul

Password forgotten
Link available: ☒
PasswordRecovery.zul

Inbox
Link available: ☒
Inbox.zul

Figure 41: Activate registration



Login to Business Filemanager

Username

Password

Forgot your password?

Register

Login

Electronic mailbox

Welcome to Business Filemanager!

Share your files and content with customers, co-workers and friends, easy and secure.

Start sharing today!

We care for you.

Your Business Filemanager Team
@ doubleSlash

Figure 42: Registration process

Registration

1. Enter userdata _____ 2. Start

First name: *

Last name: *

Login: *

E-Mail: *

Mandatory fields *

☐ I have read and accepted the terms of usage *

You are already registered?
Login now

➔ Start

Figure 43: Entering the personal data

Create user Edit user Allocate groups Delete user							
Show Systemuser							
Username	Name	E-mail	Company	Department	Status		
ADMIN	Admin, Admin	pe-dummy@doubleSlash.de			!		
DSSUPPORT	Support, doubleSlash	pe-dummy@doubleSlash.de	doubleSlash		!		
LMILLER	Miller, Lars	kontakt@business-filemanager.de			✓		
MAX.MUSTERMANN@DOUBLESASH.DE	Mustermann, Max	max.mustermann@doubleSlash.de			✓		

Figure 44: New registered users

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Registration

Registration enabled: ☒

Use mail as login: ☐

Validity period for new users (in days, -1 = unlimited):

Automatically release new registered users: ☐

Workflow:

de
en

```

[ color=grey]
[ table]
[tr]
[td] Benutzerdaten eingeben
[td]
[tr]
[td]
[td] Starten
[tr]
[td]
[td]
[/tr]
[/table]

```

Text for accepting the terms of use:

de
en

Ich habe die Url-<https://www.business-filemanager.de/76e-237/Nutzungsbedingungen/ur/> gelesen und akzeptiert

Button name:

de
en

Starten

Users to inform about a registration:

Invitations

Limit invitation to specific groups: ☐

Only users from the following groups may invite new users:

Maximum validity interval for new invited users in days:

365

Additional JavaScript

active additional JavaScript: ☐

HTML:

active additional HTML: ☐

HTML:

CSS:

Figure 45: Register Configure

You can make the following changes to the invitation function:

- Limit invitations to specific groups.
- Only legitimize users from certain groups to invite new users.
- Set the maximum invitation validity period (in days).

- You can also include additional JavaScript source code to include tracking features for all completed registrations.
- If you enable additional HTML, you can insert HTML source code here for a structurally and stylistically custom registration process. For more information about this, please contact Business Filemanager support.

7.1.3 Storage information plugin

The Storage Information plugin is only available in the administrator area and shows you the current storage consumption of your cloud.

To do this, select the “Storage Information” item within the settings menu.

7.1.4 Watch plugin

With this plugin function you can check if a file has been downloaded or files have been uploaded within a folder. If the corresponding event occurs, you will be notified by e-mail.

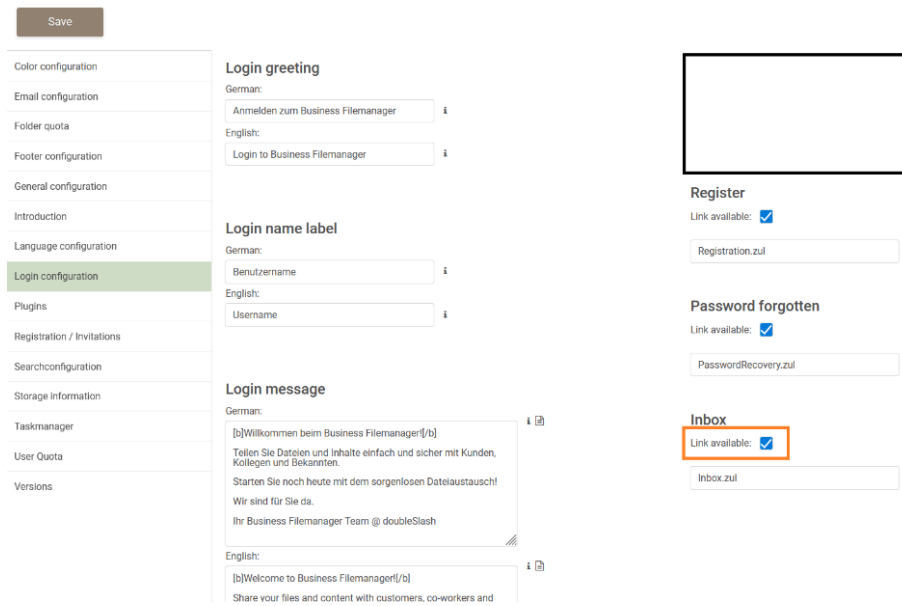
More detailed information can be found in the user manual.

7.1.5 Inbox plugin / Electronic mailbox

This plugin function allows unregistered persons to send files and folders to registered Business Filemanager users. These are then saved in the recipient’s *“Electronic mailbox” folder, which you can find in the parent folder “My files”*.

More detailed information can be found in the user manual.

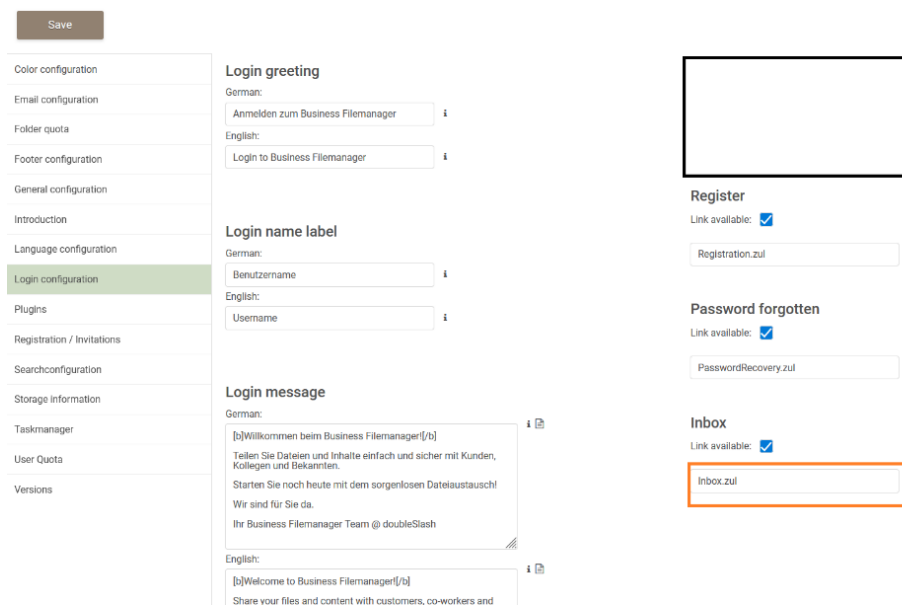
Installing the Inbox plugin adds more settings to the *“Login configuration”*. To make changes, navigate to *“Administration” > “Settings”* via the *“User Icon”*. In the *“Login configuration”* you will find a new section Inbox. If the *“Link available”* is checked, a direct link *“To electronic mailbox”* will appear in the login screen. If this function is deactivated, the direct link also disappears. However, deactivating it does not deactivate the electronic mailbox. Manually entering the URL under which the electronic mailbox can be reached will still lead to the electronic mailbox.



The screenshot shows the 'Login configuration' settings page. The 'Inbox' section is highlighted with a red box. It contains a 'Link available' checkbox which is checked, and a text field containing 'Inbox.zul'. Other sections visible include 'Login greeting', 'Login name label', 'Login message', 'Register', 'Password forgotten', and 'Inbox' (the one highlighted).

Figure 46: Inbox settings

The URL is set to *https://<your drive URL>/Inbox.zul* by default. You can change the URL at any time.



This screenshot is identical to Figure 46, showing the 'Login configuration' settings page. The 'Inbox' section is highlighted with a red box, showing the 'Link available' checkbox checked and the 'Inbox.zul' text field.

Figure 47: Inbox.zul

7.1.6 Support plugin

This function has been implemented for 1st level support in your company. You can store a contact person with a corresponding e-mail address for the users on the system. For this purpose, you will find a text box in the lower left area of the screen, in which you can formulate your request and send it directly to the contact person in the company via the “Send” button. To set the e-mail address of the contact person, open the menu via the user icon in the upper right area of the screen, select “Administration” and then “Settings” > “Support request”.

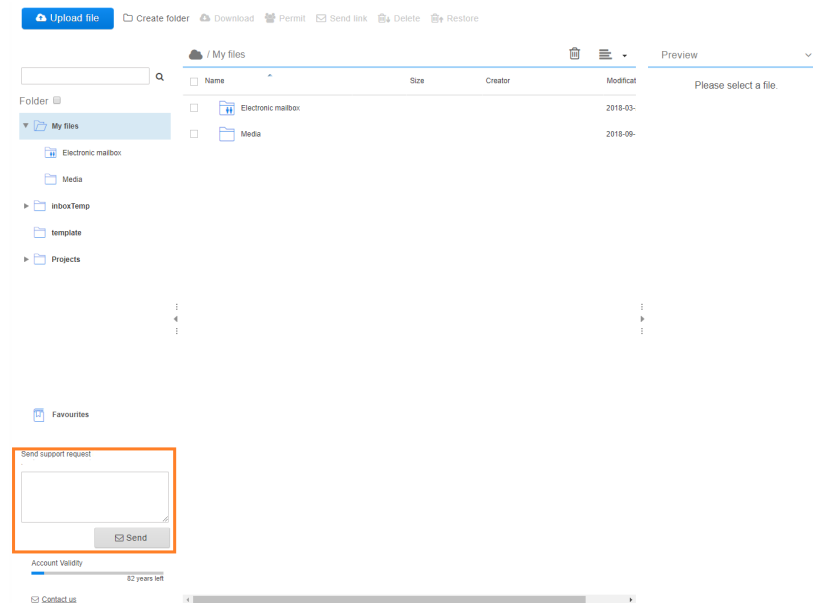


Figure 48: Support field

7.1.7 User relation repository plugin

This plugin ensures that users and groups cannot see each other on the system. Only after communicating with the respective user or group in any context (file exchange, approval granted, etc.), he appears as a suggestion in the search. This has the advantage that users of a system cannot see each other unless a connection has already taken place.

If you activate the option “Users in the same group are allowed to see each other” in the “UserRelations” tab, suggestions for groups or users from the same group and groups in which you are a member or subadmin are displayed.

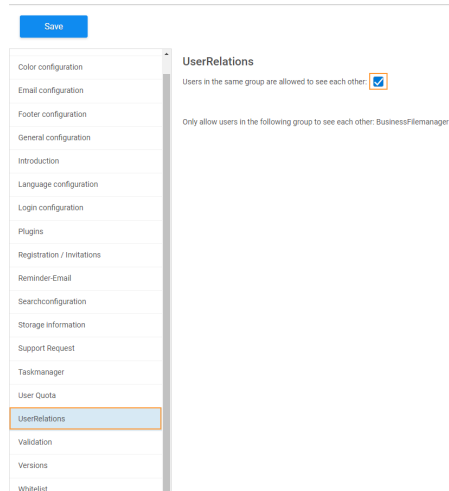


Figure 49: activate user relations

Example: Send link (the user was previously communicated with at least once via the Business Filemanager). If the plugin is activated, when the logged-in user enters the recipient's name/email address, this is also suggested to the user. (Figure 50)

Send link

Recipients

Mustermann, Max (MAX.MUSTERMANN@DOUBLESASH.DE)

- Business Filemanager.docx
<https://demo3.business-filemanager.de/rest/share/75eeff78-1344-4496-9636-03831912cf6f>

Message

Send link

Cancel

Figure 50: Connection was established

If no connection has been established yet, the entered e-mail address will not be suggested as recipient. (Figure 51)

Send link

Recipients

- Business Filemanager.docx
<https://demo3.business-filemanager.de/rest/share/75eeff78-1344-4496-9636-03831912cf6f>

Message

Send link

Cancel

Figure 51: Connection was not established

If the plugin is not activated, all users of the system can appear in the suggestion list (Figure 52)

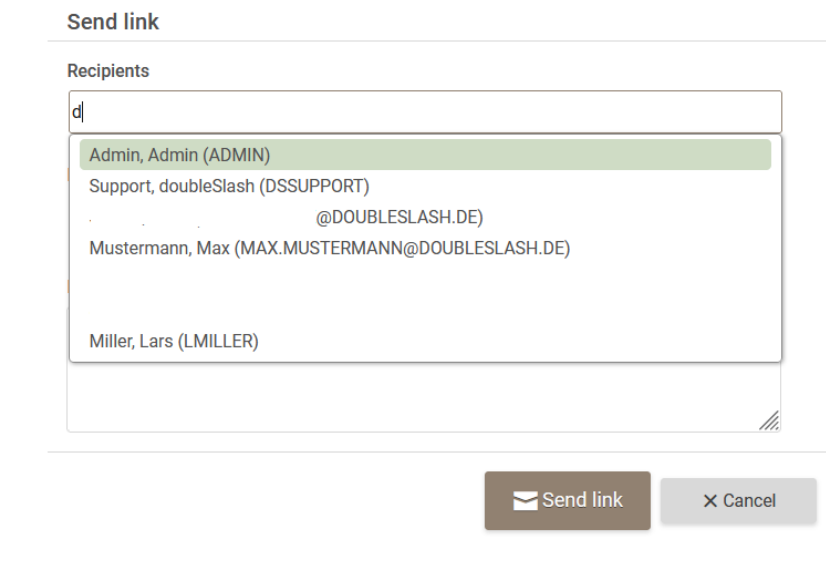


Figure 52: Plugin not active

7.1.8 Reminder plugin

With the Reminder Plugin an individual reminder can be set for each file. For each reminder you can choose a reminder time (date and time) and write a message. If the time occurs, you will receive an email notification containing your individual message. This plugin is especially helpful to be informed about your appointments and deadlines in time.

You can find more detailed information in the user manual.

7.1.9 Thumbnails graphic magic plugin

The plugin generates thumbnails for supported file formats. The plugin can display thumbnails for EPS, PNG, JPEG, GIF, PS, PSD, PICT, SVG, TIFF, XCF, XPM, BMP and PDF.

7.1.10 Versioning plugins

The Version Plugin allows to restore the original editing status of a document or a file. If a document is synchronized with the Business Filemanager via SyncClient, a version of this document is created automatically, if the Version Plugin is installed. If the synchronized document is changed again and saved over, the Business Filemanager creates a new version of this file.

All versions can be viewed in the Business Filemanager WebApp. Alternatively, if you want to call up an older editing status without over saving the current version, you can simply download the older version. This will not overwrite the current version with the older version.

More detailed information can be found in the user manual.

To activate the plugin, you must also click the “Activate” button under Settings “Versions”.

Please also take into account that the versioning plugin requires additional memory. We recommend to limit the number of versions per document to max. 5 versions.

Note: After activating the plugin, a system restart is required.

7.1.11 History export plugin

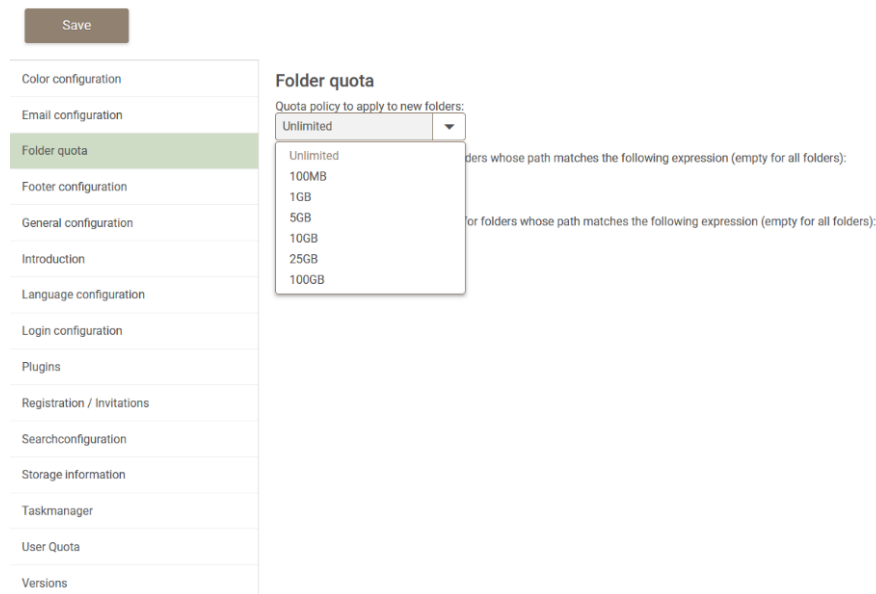
Conveniently export log data of folders and files as an Excel file and always have an overview of who, when and how the resource was accessed. The Excel file provides information about the timestamp, file or folder path, type, user, action, and other details.

More detailed information can be found in the user manual.

7.1.12 Folder quota plugin

The Folder Quota plugin allows you to set upload limits for specific project folders and thus control the storage of individual folders or the entire system.

You have the option to limit the storage capacity across all newly created project folders (see Figure 53). Or you can set the folder quota for specific paths (Figure 54).



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Quota policy to apply to new folders:

Unlimited

Unlimited

100MB

1GB

5GB

10GB

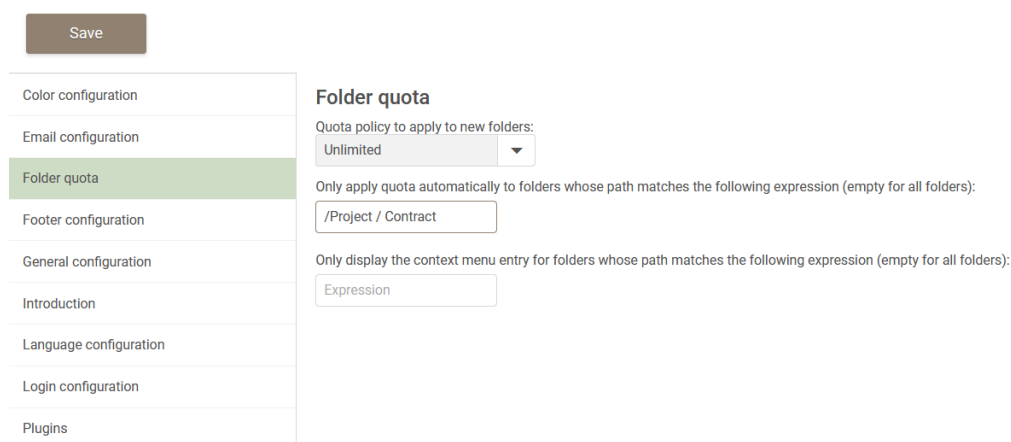
25GB

100GB

Only apply quota automatically to folders whose path matches the following expression (empty for all folders):

Only display the context menu entry for folders whose path matches the following expression (empty for all folders):

Figure 53: Set quota for all new folders



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Quota policy to apply to new folders:

Unlimited

Only apply quota automatically to folders whose path matches the following expression (empty for all folders):

/Project / Contract

Only display the context menu entry for folders whose path matches the following expression (empty for all folders):

Expression

Figure 54: Set quota for paths

7.1.13 Office 365 plugin

With the Office 365 plugin, Office files can be opened directly, without prior download, from the Business Filemanager web interface. The file can then be edited and presented online. Changes are immediately saved in the Business Filemanager, can be viewed at any time and can be restored via the version list.

Please note: to use this plugin, you need Microsoft Office365 licenses.

7.1.14 Full text search plugin

With the search plugin you can shorten workflows and thus work faster and more efficiently. It also increases usability. The search is available both on the web and in the apps.

To activate the plugin, click on “Search configuration” under Settings and then on the “Activate full-text search” button.

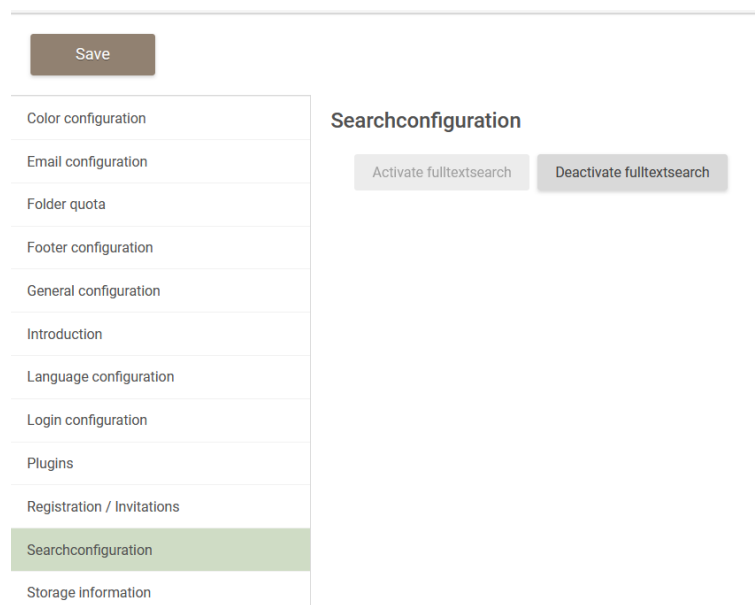


Figure 55: Activate full text search

Note: we recommend activating the plugin outside the usual use of the Business File Manager (e.g. overnight). Indexing the system may take a few hours depending on the amount of data.

7.1.15 Favorites plugin

With the Favorites plugin you can mark your most relevant and most used documents as favorites to have them quickly at hand. You can set the favorites in the web version as well as in the apps.

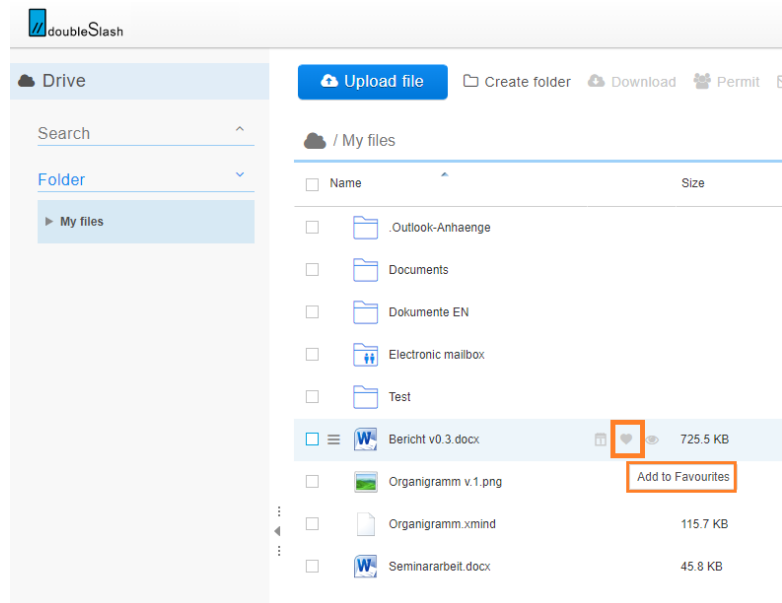


Figure 56: Add file to favorites

7.1.16 Automatic delete

With the automatic deletion plugin you can prevent the “Projects” section from becoming a data dump. In addition, it can help to keep order and reduce storage requirements. If the data is subject to deletion periods (e.g. due to data protection), these deadlines can be easily ensured by automatic final deletion. If you have particularly sensitive data in a data room, the hold time can be limited to minimize unnecessary risks.

Note: The project policy “automatic deletion” can only be set up by the super administrator or project administrators.

You can configure the project policies by right-clicking on the respective project folder. (Figure 57)

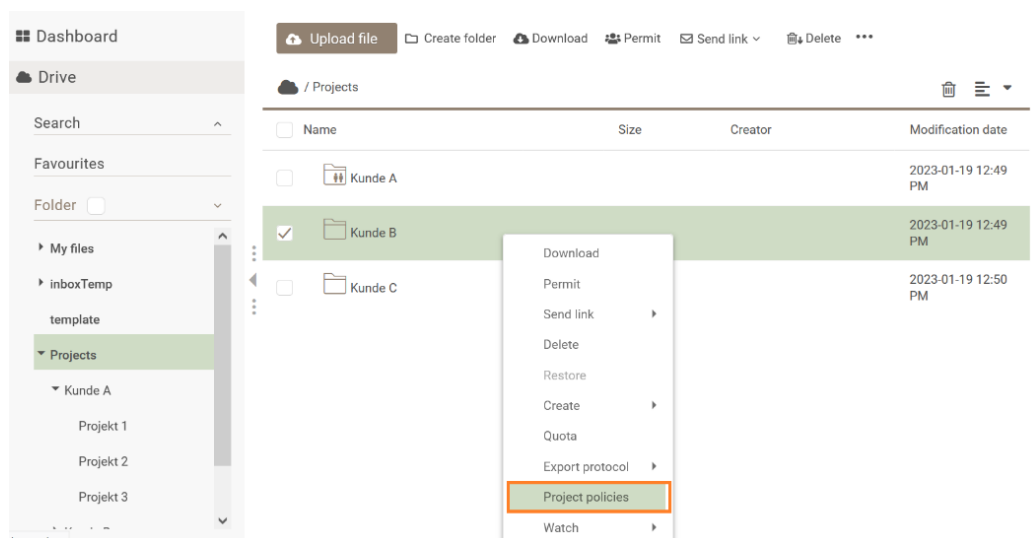
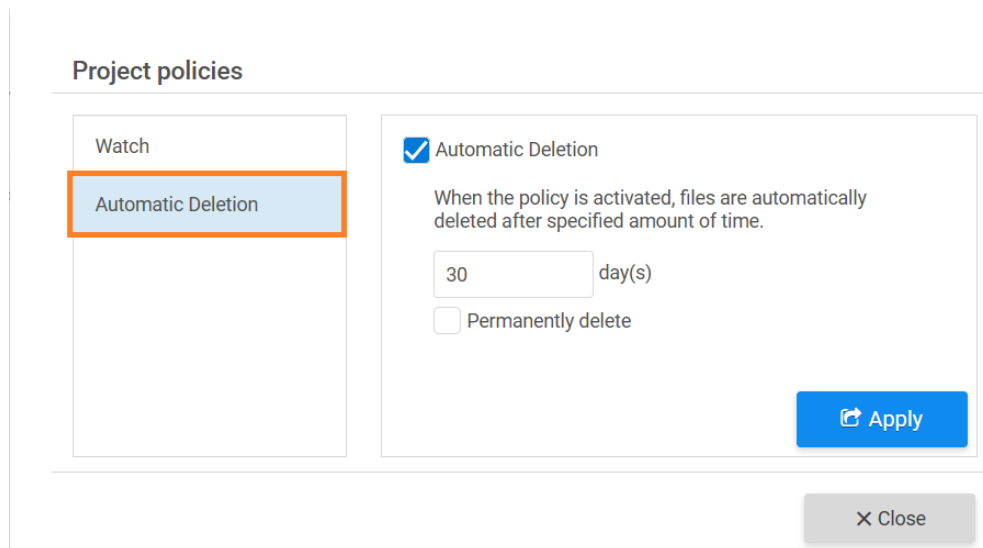


Figure 57: Set project guideline

After that you can set the automatic deletion. You have the option to set the days after the files are deleted in the project folder and to activate the final deletion. If this is not activated, the files will end up in the recycle bin for the time being and can be restored.

You can make the central recycle bin delete settings as described in Chapter 19 General configurations.



Project policies

Watch

Automatic Deletion

☒ Automatic Deletion

When the policy is activated, files are automatically deleted after specified amount of time.

30 day(s)

☐ Permanently delete

Apply

Close

Figure 58: Automatic deletion

7.1.17 SFTP-Plugin

The Secure File Transfer Protocol provides secure file transfer over a confidential data stream. It is the default file transfer protocol for use with the SSH2 protocol.

Furthermore, the SFTP protocol is used for general access to the FTP server's file system. The SFTP protocol runs over a secure channel, so no passwords or file information is transmitted in clear text.

The SFTP plugin is currently only available for our OnPremise customers. To set it up, please contact support. Configuration entries for the plugin are included in the Operations Manual.

7.1.18 Only-Office plugin

With the Only-Office plugin, Office files can be opened directly, without prior download, from the Business Filemanager web interface. The file can be edited and presented online directly. Changes are immediately saved in the file manager. Changes are visible at any time and can be restored via the version list.

Please note: to use this plugin you need Only Office licenses.

7.1.19 Microsoft Teams plugin

With MS Teams integration, you protect your data from unauthorized access and avoid storing data on a server outside Germany or Europe. You can request files via MS Teams and manage them in your Business Filemanager. Likewise, you can use the MS Teams plugin to securely send files from the Business Filemanager externally. This allows you to send data without changing tools while maintaining data security policies.

7.1.20 User verification plugin

With the User Verification plugin, the users you allow must verify themselves at regular intervals with a link to their corresponding email address. Until successful verification, these users will be blocked by the system. This way, you can ensure that external users, such as customers and suppliers, have to verify themselves regularly and no longer have access to the data when they leave the company. After activating the plugin, you can define a period between verifications in the “User verification” tab and exclude users with the e-mail of a specific domain part.

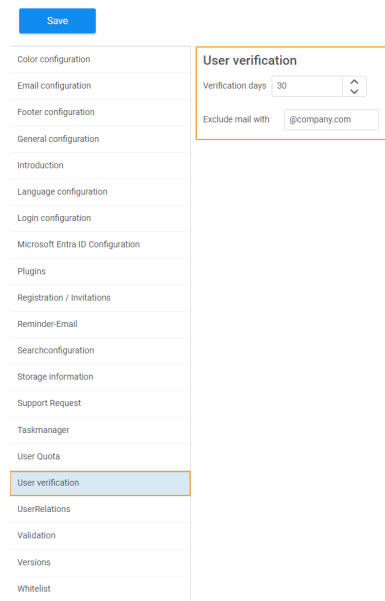


Figure 59: Settings User Verification Plugin

7.1.21 Data room policy - encryption

Data rooms and the data they contain can be encrypted using end-to-end encryption. Only authorized users with whom the key has been shared can decrypt the data.

To define data room policies for encrypting files, you need to install and activate the plugin.

Administrators of a data room can then define, change and deactivate policies for each data room.

Further detailed information can be found in the user manual.

7.1.22 Whitelist plugin

The Whitelist plugin offers you the possibility to determine which types of documents may be uploaded to your system. This significantly minimizes the risk of malware infections and unknown content.

In the “Whitelist” tab, you can add or remove the permitted MIME types of file formats.

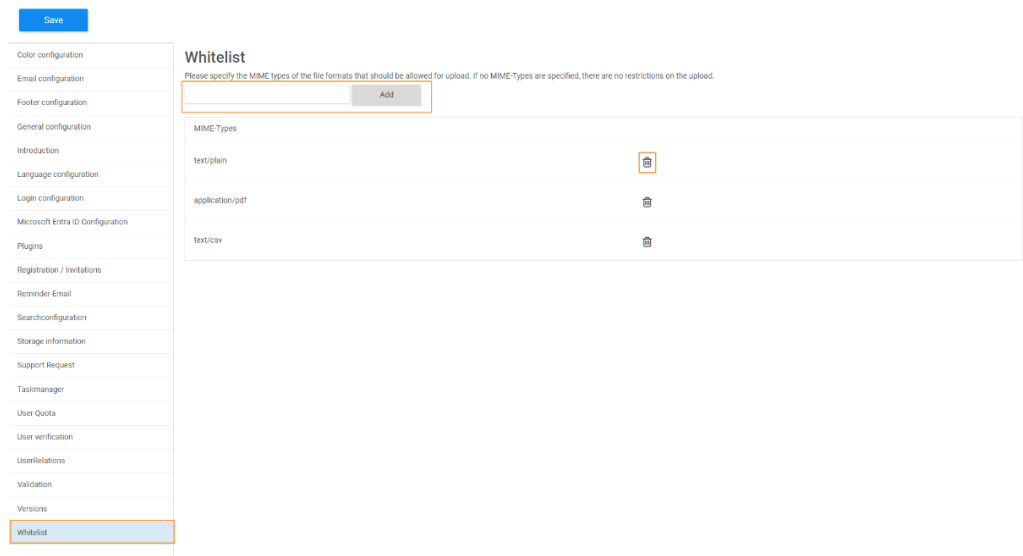


Figure 61: Addition of permitted MIME types

An error message is displayed if an attempt is made to upload unauthorized documents.

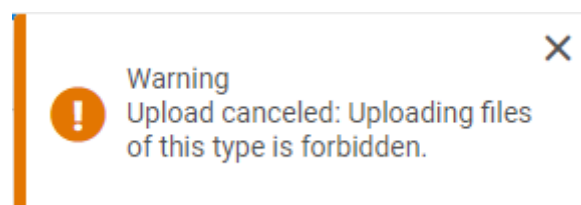


Figure 62: Whitelist error message

7.1.23 Microsoft Entra ID (formerly Azure AD) plugin

Please note: SFTP and Webdav are excluded here

The Microsoft Entra ID plugin (formerly Azure AD) enables safe login with the same Microsoft Entra ID login data, as well as 2-factor authentication, provided this has been set in the administration settings of Microsoft Entra ID. This protects data and resources without compromising the user experience.

In the "Microsoft Entra ID Configuration" tab, it is possible to activate or deactivate login via Microsoft Entra ID. The necessary parameters for the configuration can also be defined there:

Client ID: Directory (tenant) ID, can be viewed in the overview in your Microsoft Entra ID account

Authority URL: Application ID URI, can be viewed in the overview in your Microsoft Entra ID account

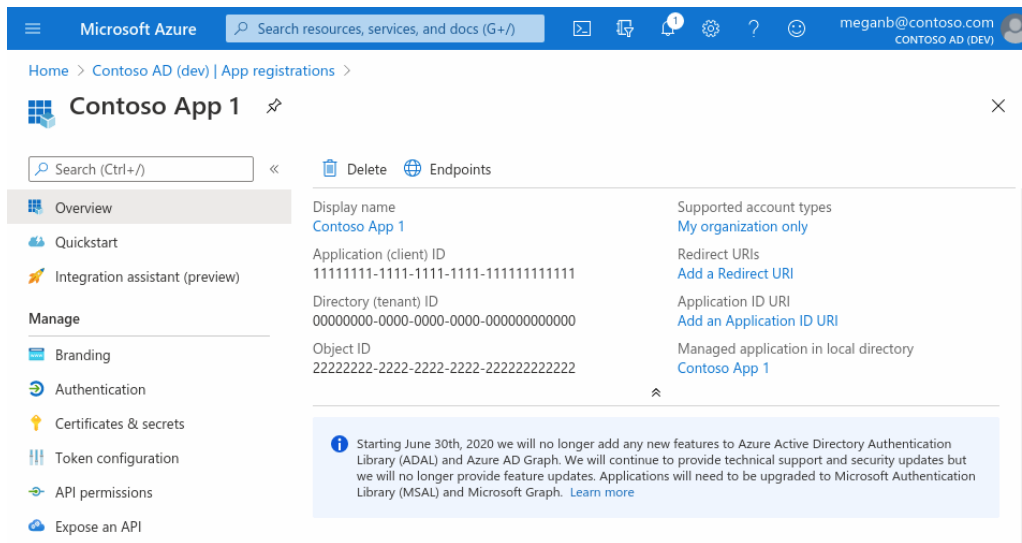


Figure 63: Parameter Client ID and Authority URL

Source: <https://learn.microsoft.com/de-de/entra/identity-platform/quickstart-register-app>

Secret: The value of the client secret, which can be viewed in the 'Certificates & secrets' tab in your Microsoft Entra ID account.

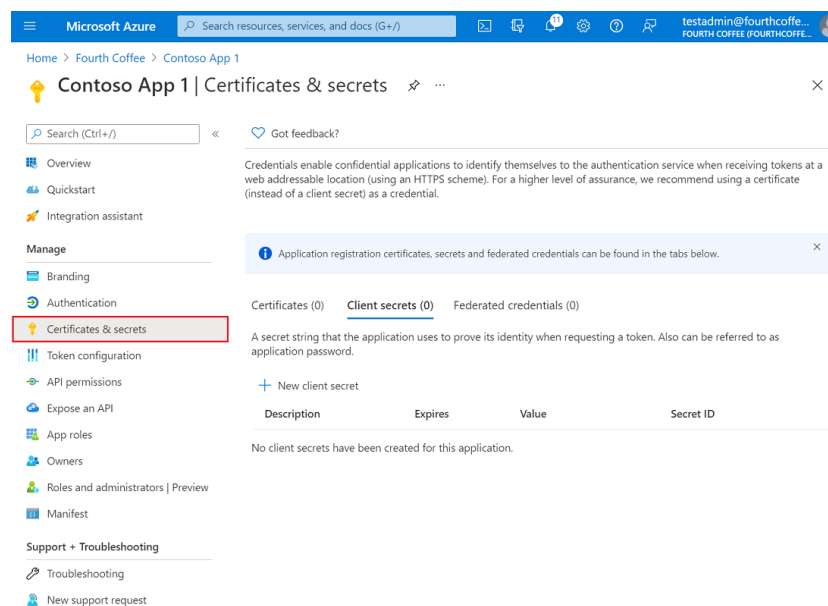


Figure 64: Parameter secret

Source: <https://learn.microsoft.com/de-de/entra/identity-platform/quickstart-register-app>

Please note: As soon as you have created the client secret, it must be saved, as it can no longer be viewed afterwards.

You can find more information on the parameters at: <https://learn.microsoft.com/de-de/entra/identity-platform/quickstart-register-app>

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Information: Microsoft Entra ID must be registered with microsoft to use these settings.
Instructions for registering your application with Microsoft Identity Platform can be found here: <https://learn.microsoft.com/en/identity-platform/quickstart-register-app>

Microsoft Entra ID active: ☒

Client ID:

Authority URL:

Secret:

Figure 65: Activation of Microsoft Entra ID plugin