doubleSlash
Business Filemanager

www.business-filemanager.de

DIE BUSINESS CLOUD– SIMPLE, SECURE, FLEXIBLE

Extended functions described in detail.

User Manual

WELCOME

Welcome to the user manual of doubleSlash Business Filemanager - the modern file transfer solution for businesses.

In this manual all functions of the web application are explained to you in detail. If you still have 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.

Table of contents

1 User login

To log in with a user, start your browser and call the URL of your Business Filemanager instance (usually "<customer>.business-filemanager.com/").

Then enter the access data for your Business Filemanager account in the fields provided and confirm with the "Login" button (Figure 1).

Note: If you do not have a Business Filemanager account yet, you can create one by clicking the "Register" button, as long as the IT administrator has enabled this function. Please follow the instructions.

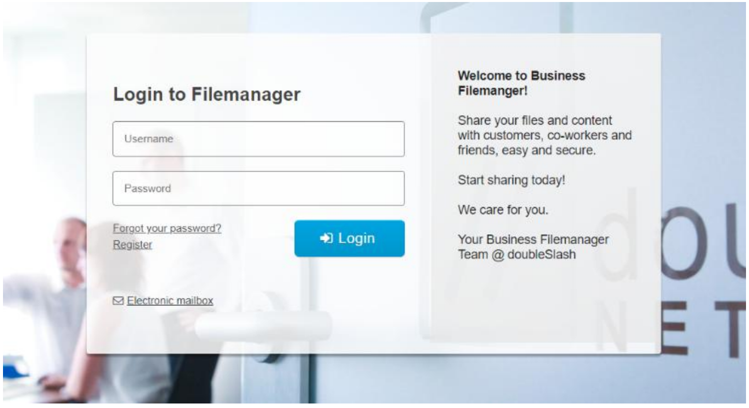


Figure 1: Login Web-App

After successfully logging in, you will be taken to your dashboard (Figure 2). On your dashboard you will find your recently visited folders as well as a quick access, files marked as favourites and your recent inbox entries. You will also see your available storage and login information.

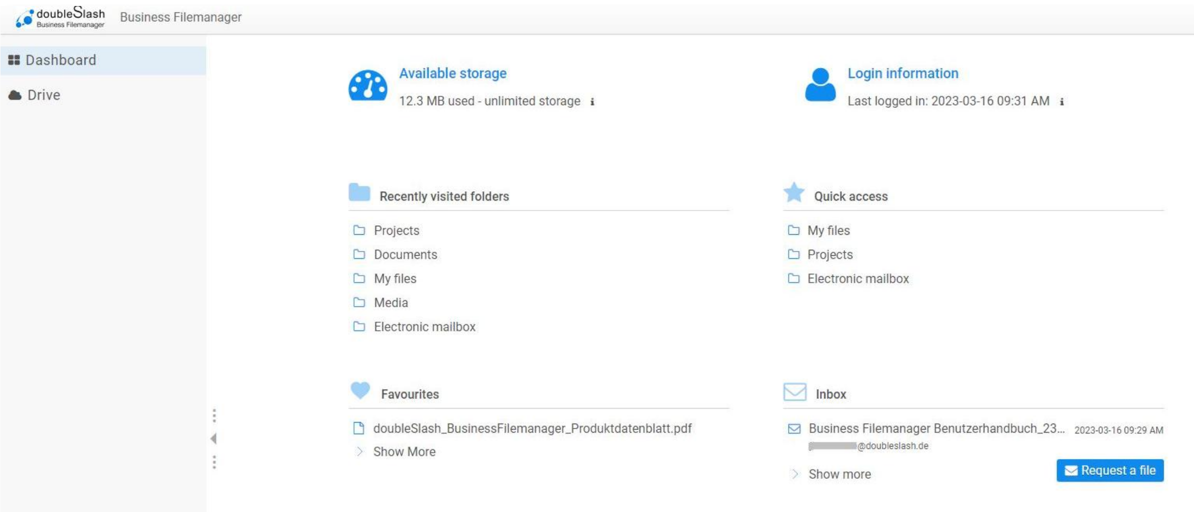


Figure 2: Dashboard

2 Upload/Download files

2.1 Upload files

Upload file(s): To upload one or more files, you have two options:

Option 1 (via button "Upload file"):

- Select a folder where the new file should be saved
  (button "Upload file" becomes visible).
- Click on "Upload file".
- Select the file you want to upload in your directory.
- (You can also select multiple files by holding down the Ctrl key while selecting them).
- Confirm by clicking "Open".
- Whether a virus scan has taken place is displayed in the status.

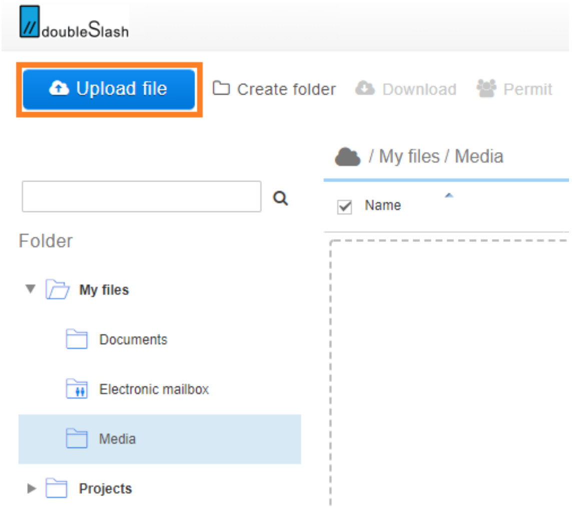


Figure 3: Upload files

Option 2 (via Drag & Drop):

- Select a file that you want to upload.
- Drag and drop the file into a folder where you want to place it.
- Whether a virus scan has taken place is displayed in the status.

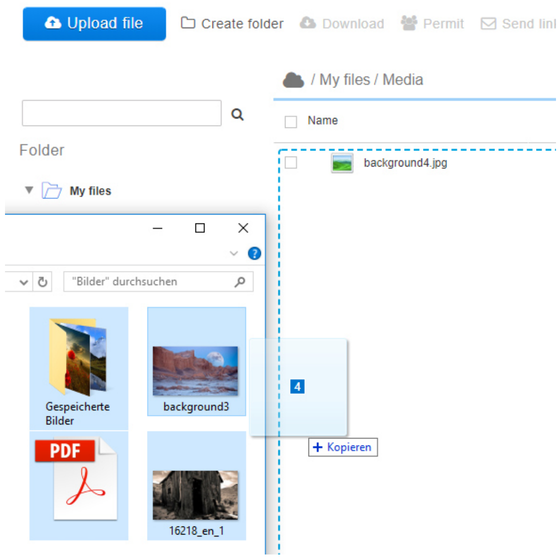


Figure 4: Drag & Drop

2.2 Download files

Download file(s): To download one or more file(s), you have two options:

Option 1 (via the "Download" button):

- Select one or more file(s) you want to download (a check mark will be placed in each).
- Click on "Download".
- Confirm with "OK".
- File(s) will be downloaded.
- Note: If there is more than one file or folder, the data will be downloaded as a .zip archive.

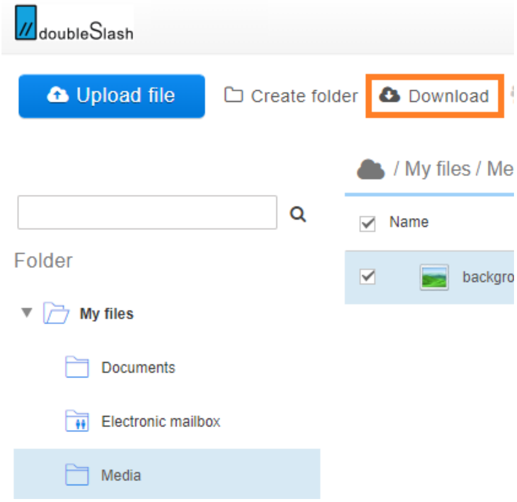


Figure 5: Download files via button

Option 2 (via right mouse button):

- Select one or more file(s) you want to download (a check mark will be placed in each).
- Click the right mouse button and select "Download".
- Confirm with "OK".
- File is downloaded.

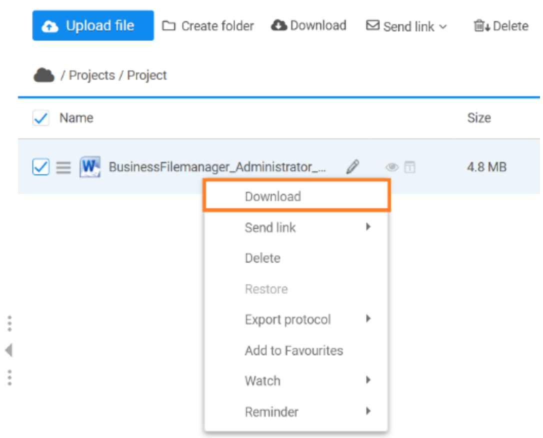


Figure 6: Download files via right click

Option 3 (via double-click):

- Select a file you want to download (a checkmark will be placed).
- Double-click on the desired file to activate the download.
- The file will be downloaded.

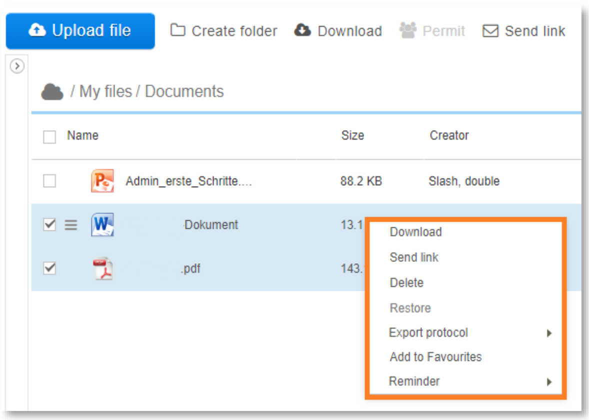


Figure 7: Download files via double click

3 Create folder

To create a new folder, first select the parent folder in the tree where you want to create the new folder (Figure 8), and then click the Create Folder button (Figure 9).

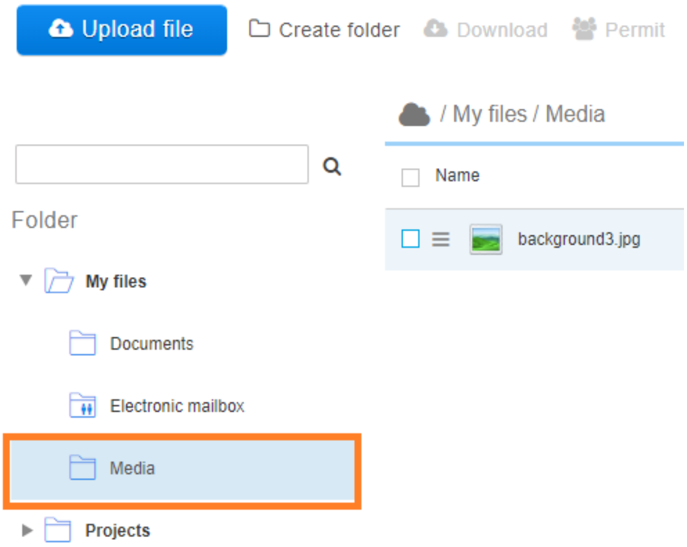


Figure 8: Select parent folder

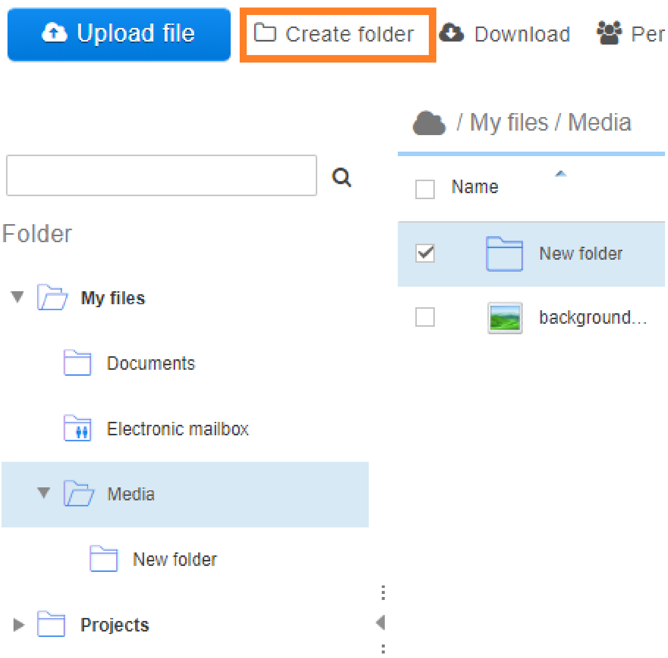


Figure 9: Create folder

3.1 Rename files / folders

To rename files or folders, first click on the pencil icon to the right of the corresponding resource (Figure 10). Then you can assign a new name via the input field and confirm it with the check mark (Figure 11).

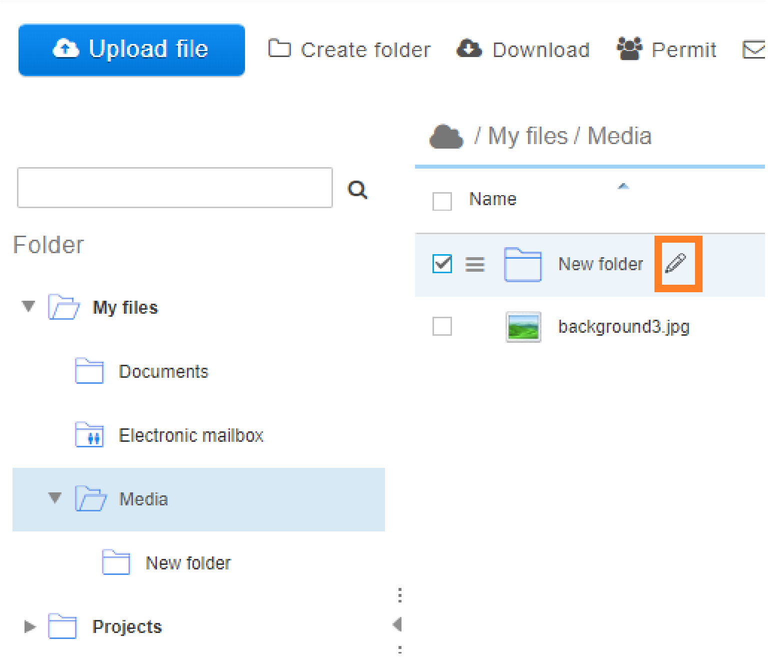


Figure 10: Rename files/folders

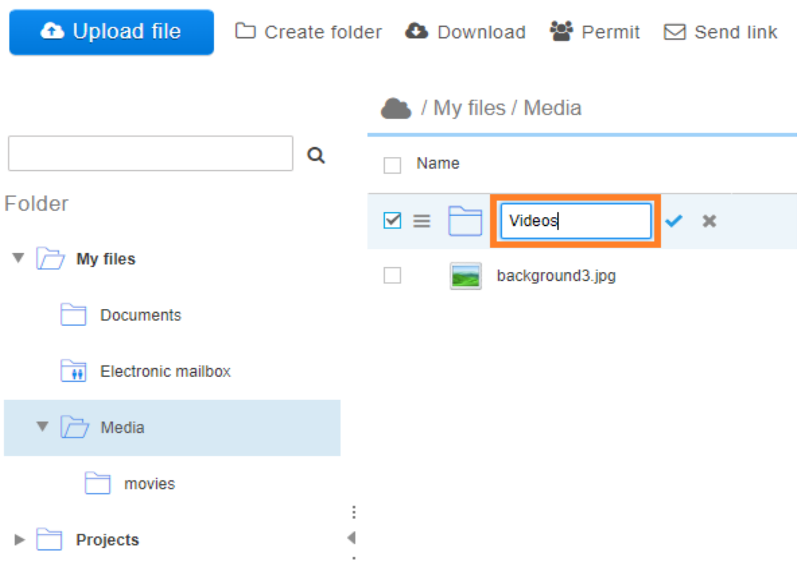


Figure 11: Enter file/folder name

3.2 Move and copy files/folders

Move files: To move files and folders, select them by placing a check mark in each and then drag and drop your selection into the folder you want to move (Figure 12)

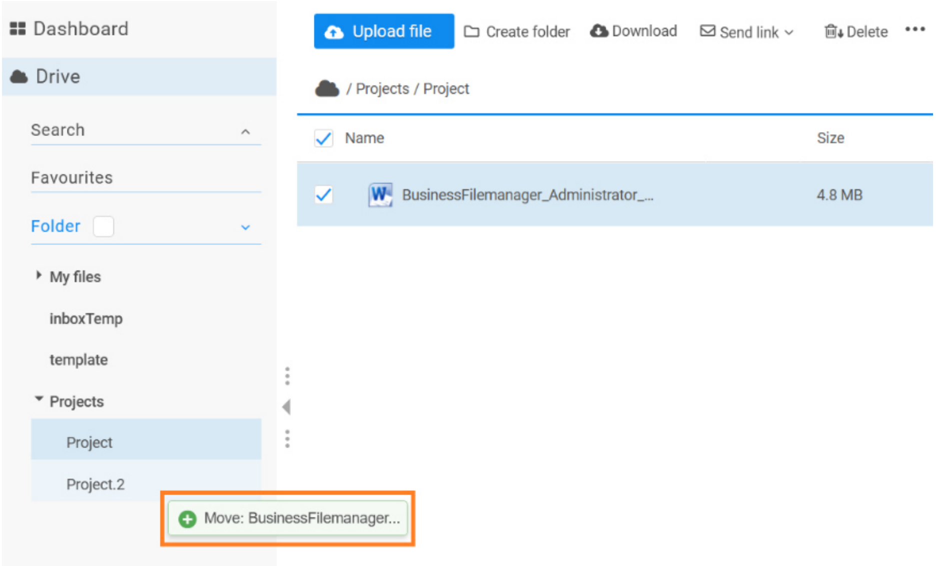


Figure 12: Move files

Copy files: To copy files or folders, proceed in the same way as for moving them by placing a check mark next to the respective resources, but while holding down the Ctrl key, drag and drop your selection into the folder to be moved (Figure 13).

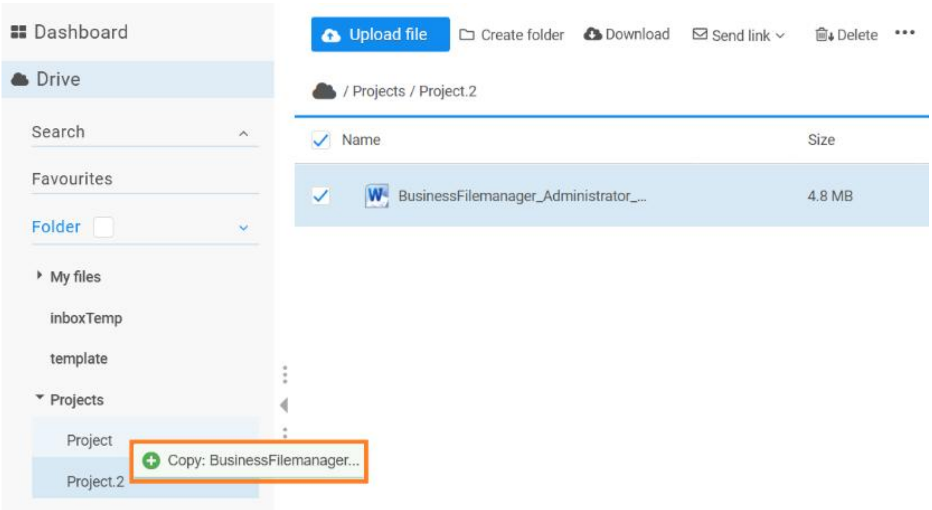


Figure 13: Copy files

4 Manage folder permissions

You have the option of granting other (already registered) users or user groups permissions for certain folders. A distinction is made between the two permissions "Download" and "Edit".

The "***Download***" permission allows only read access or download of the folder.

"***Edit***" allows both read and write access. The corresponding folder can be moved, changed, deleted and subfolders incl. contents can be created.

4.1 Authorize users/user groups

You can assign specific permissions for folders to other already registered users and thus define the usage rights.

It is important to note that only user groups that are under the "BusinessFilemanager" group can be authorized.

To authorize users/user groups proceed as follows:

- Select the folder (not several) for which you want to assign a permission and then click on "*Permit*" (Figure 14) or press the right mouse button and select "*Permit*" (Figure 15).

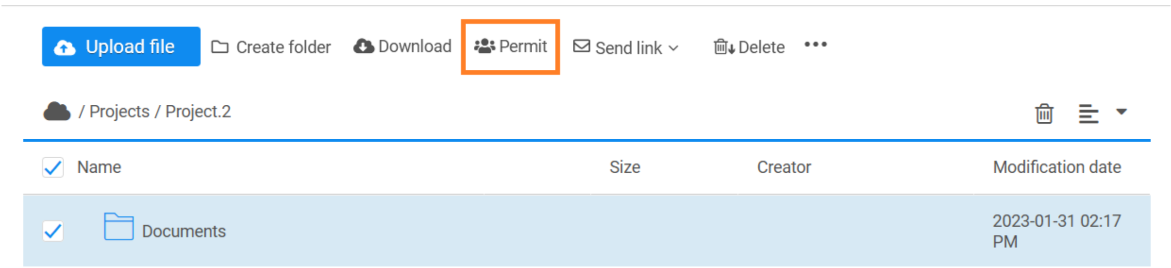


Figure 14: Authorize folder via button

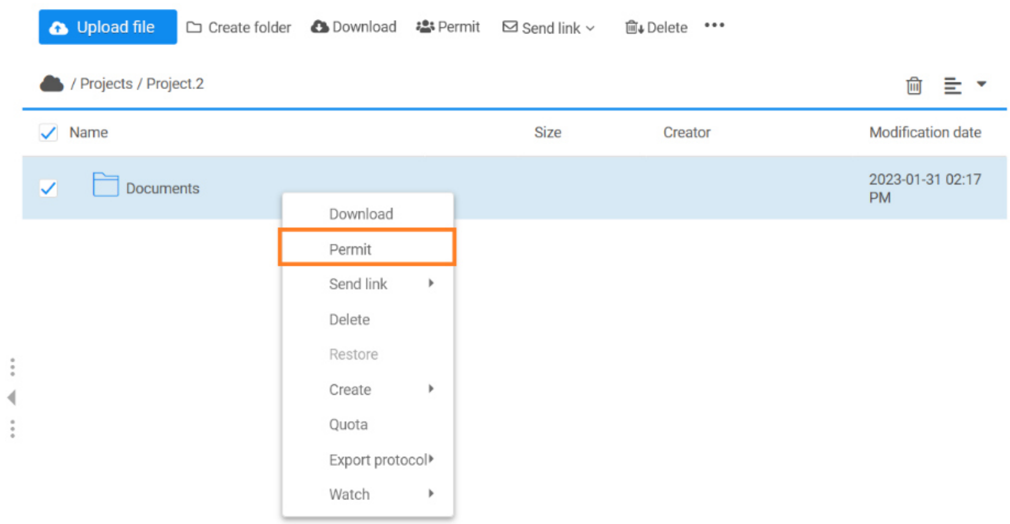


Figure 15: Authorize folder via right mouse button

- A window appears in which you first select an authorization via the drop-down menu and then enter the recipient's username or e-mail address in the text field provided. (Figure 16)

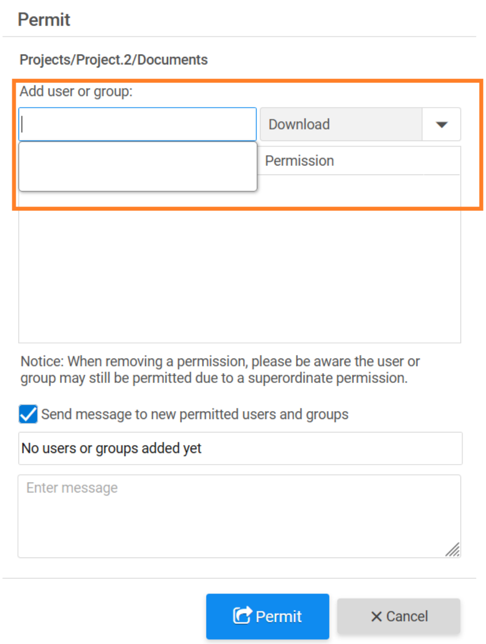


Figure 16: Assign permissions (1)

- The user or user group then appears in the list. There you can change the authorization again or delete it. If you want to add more users or user groups, repeat step 2 as often as necessary. (Figure 17)

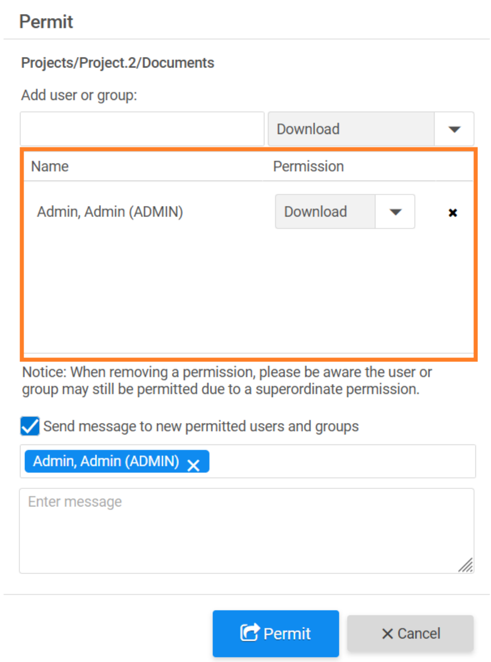


Figure 17: Assign permissions (2)

You can optionally send the recipient an individual message (Figure 18) and complete the process by clicking the "Permit" button (Figure 19). The respective users will now receive an email with the link to the corresponding folder.

Note: This may be disabled by your administrator for the system.

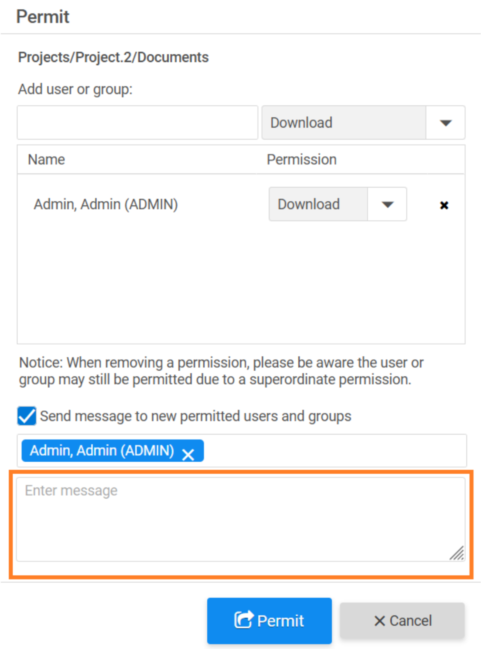


Figure 18: Assign authorization (3)

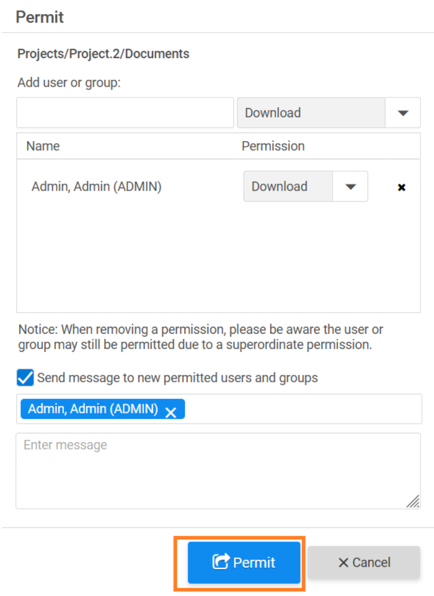


Figure 19: Assign authorization (4)

4.2 Change and delete permissions

You can change or delete the assigned permission again.

To do so, select the respective folder and click "Edit permission" in the "Permission" area under the corresponding permission (Figure 20). Alternatively, press the right mouse button with the folder selected and select "Permit" (Figure 21).

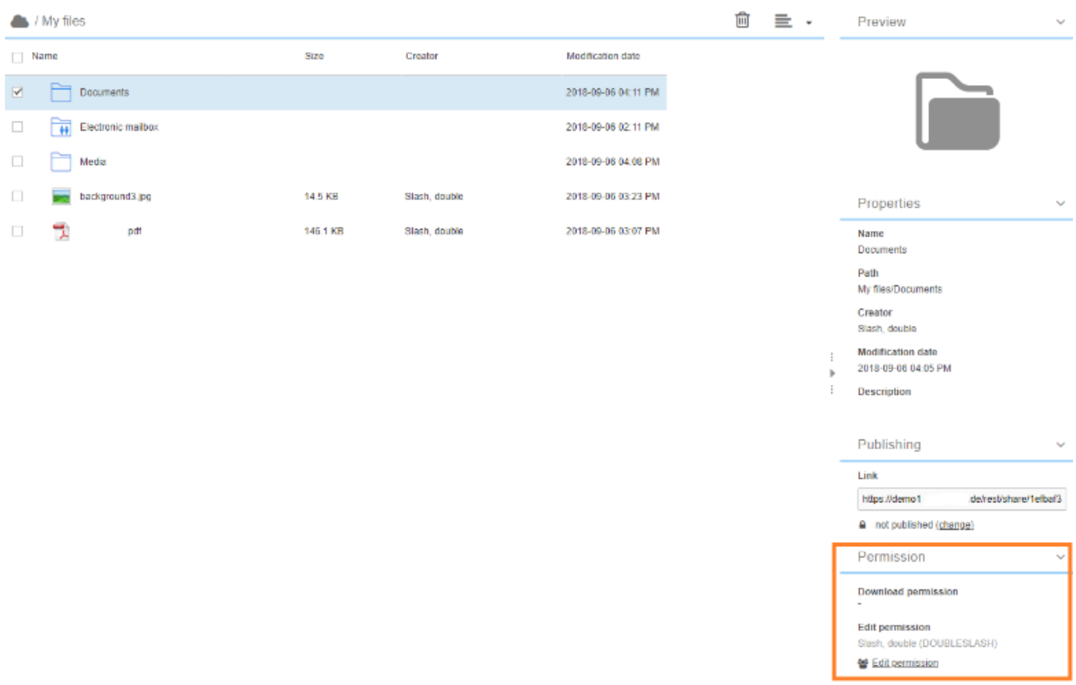


Figure 20: Change permission (1)

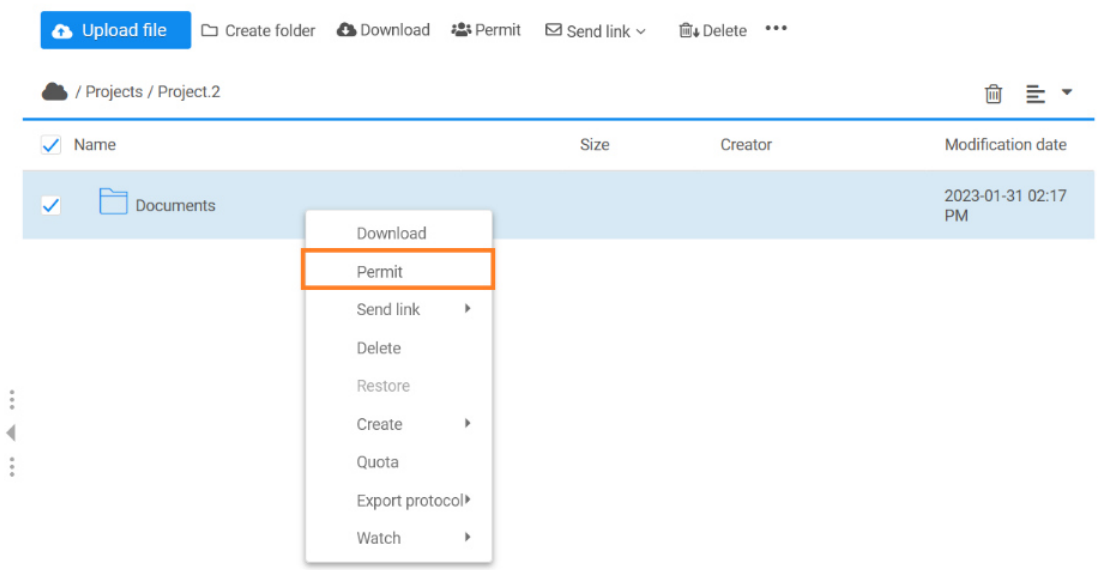


Figure 21: Change permission (2)

In the following window you can now either change or delete the authorization. Confirm the process via the "Permit" button (Figure 22).

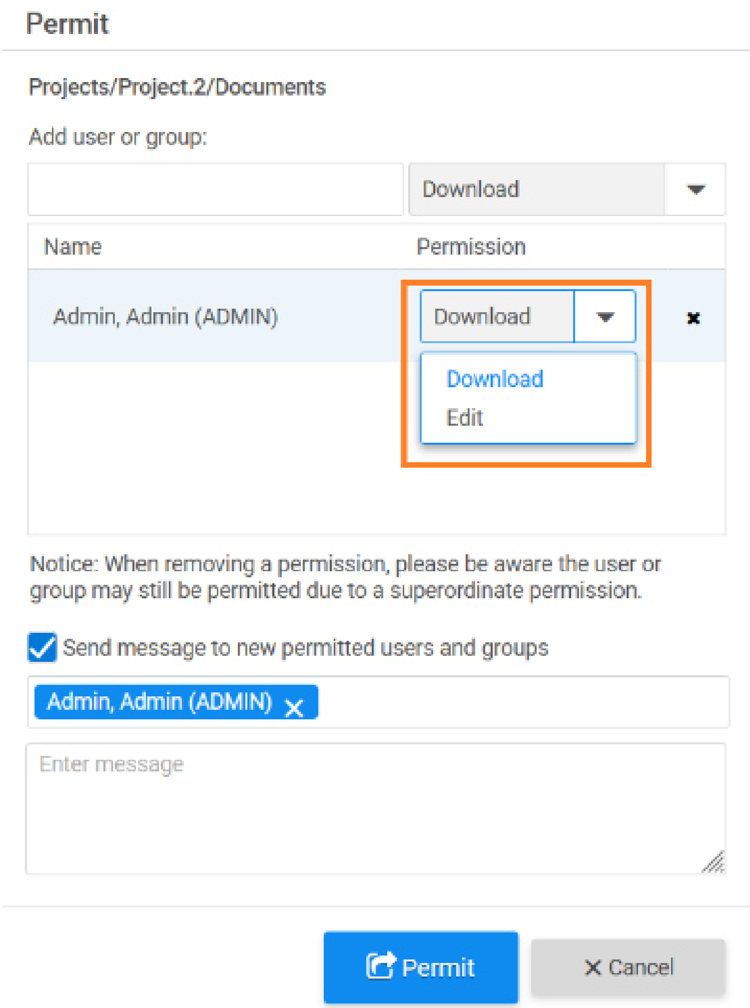


Figure 22: Change/delete authorization

5 Access to files and folders

Chapter 4 explained how to grant folder permissions to registered users with valid Business File Manager account. There is also the possibility to grant external access to files and folders. This is done via a link which is sent to the addressee. Here it should be noted how access to the respective resources is defined. A distinction is made between publicly accessible and non-publicly accessible resources. ***Publicly accessible resources*** can be accessed by anyone via the URL of the resource. Optionally, the resource can be protected with a password.

Non-publicly accessible resources can generally only be accessed by users with a valid Business File Manager account. If an external person without a user account wants to access it, the "Send link" function can be used for this purpose. To check the current status of a folder or file, select the respective resource (only one, not several) and check the currently set status in the "Publishing" area (Figure 23).

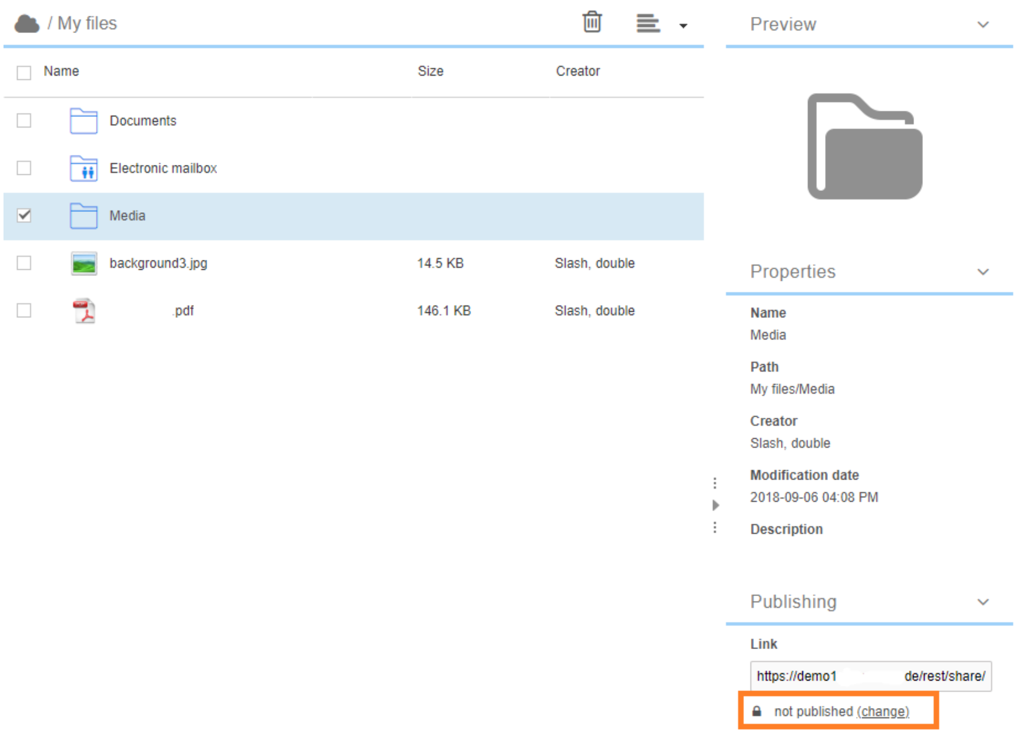


Figure 23:Check access status (1)

5.1 Change access status of files and folders

To change the access status of files or folders, proceed as follows:

Select the corresponding resource and click "*Change*" in the "*Publishing*" area under the currently set status.

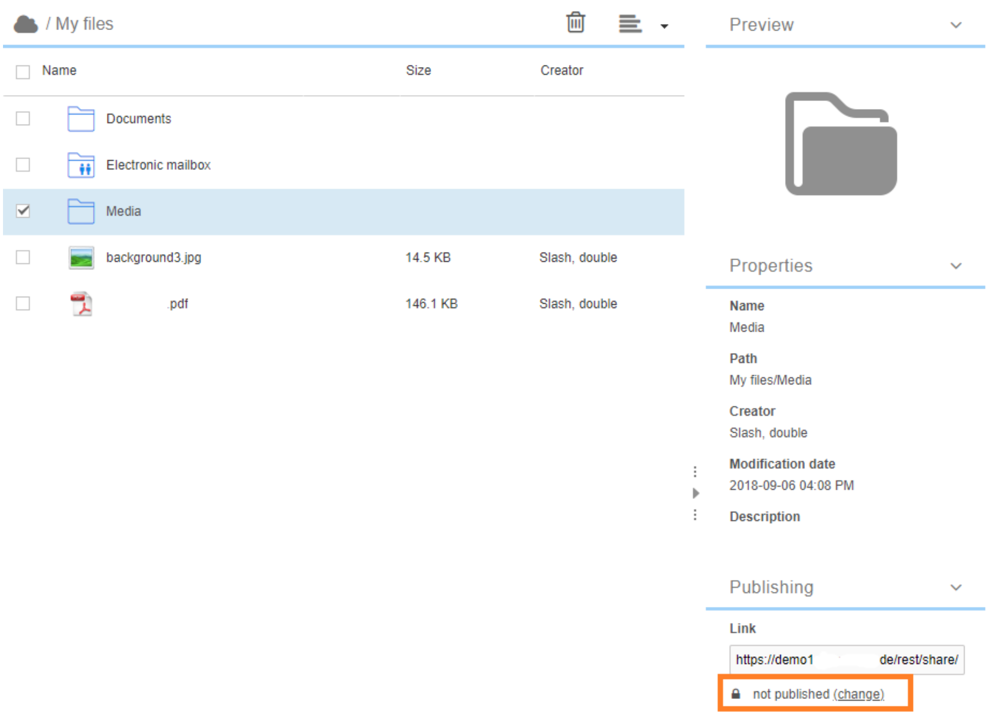


Figure 24: Change access status

In the following window you can make the resource either *publicly available* or *non-publicly available*

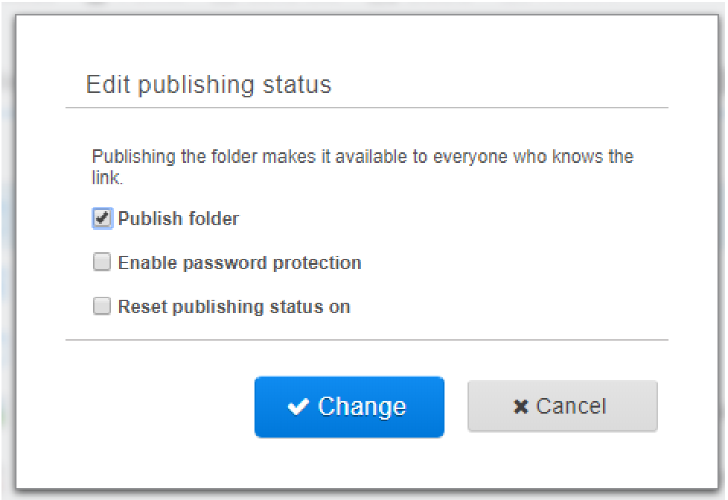


Figure 25: Change access (1)

If you have made a resource publicly accessible, you can additionally and terminally provide the associated link with a password. Confirm with "Change".

Note: If a folder is published, then all files under it are public and do not need to be published separately.

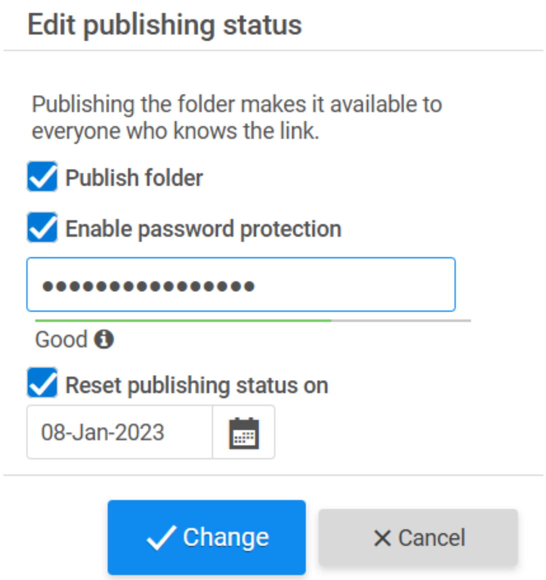


Figure 26: Change access (2)

5.2 "Send link" function

As mentioned at the beginning of the chapter, *non-publicly accessible* files and folders can basically only be accessed by registered users. You can use the "*Send Link*" function to grant access to both registered and external users.

Select the file or folder to which you want to grant access to other users and click "*Send Link*" (Figure 27).

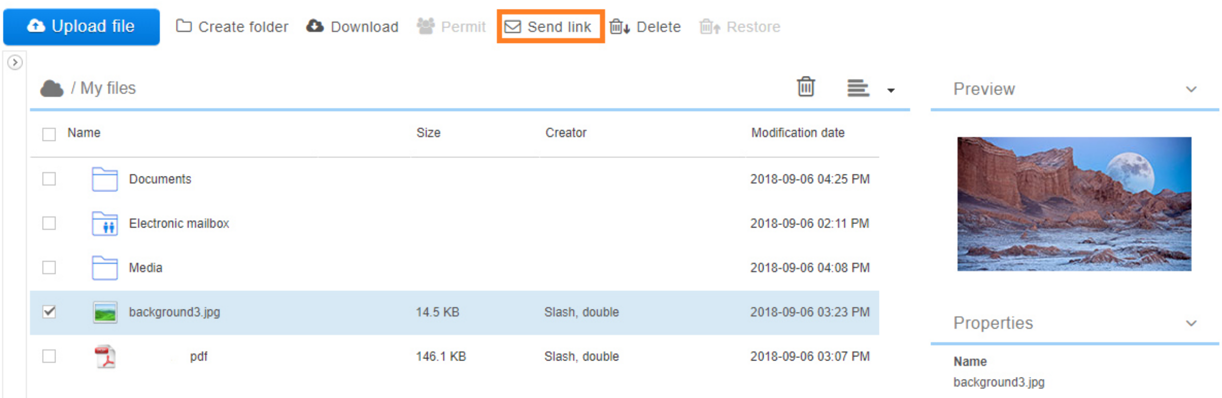


Figure 27: "Send link" (1)

Now you can specify one or more recipients and optionally compose an individual message. Click the Send Link button to continue.

If it is a public resource or a non-public resource with permissions of the recipients, the link will be sent directly. Otherwise, further steps are necessary.

In case of a non-public resource without permissions of the corresponding recipients, another window appears where you determine access. For files and folders, you have equally the possibility to grant access (optionally with password) also to users without user account.

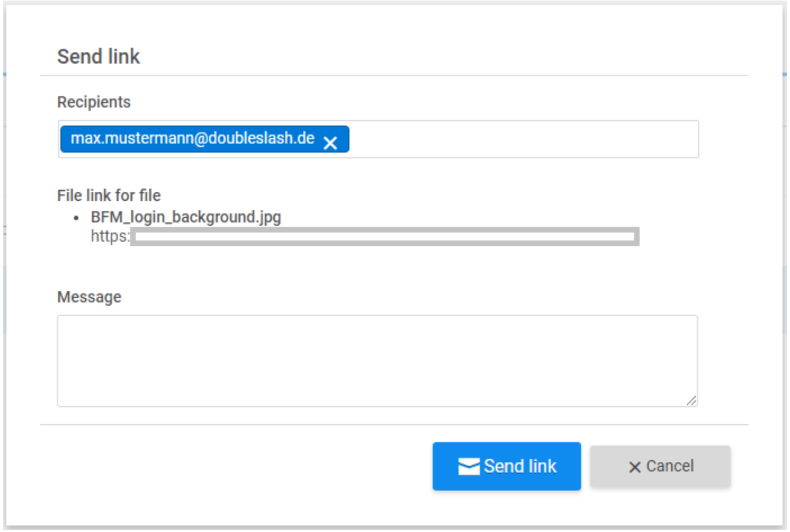


Figure 28: Send link (2)

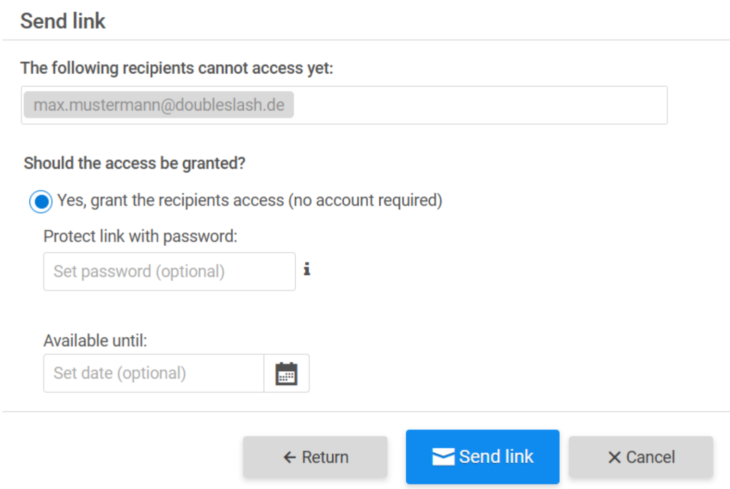


Figure 28: Send link (3)

For folders, you can additionally restrict access to registered users only. Recipients without an account will then automatically receive an invitation.

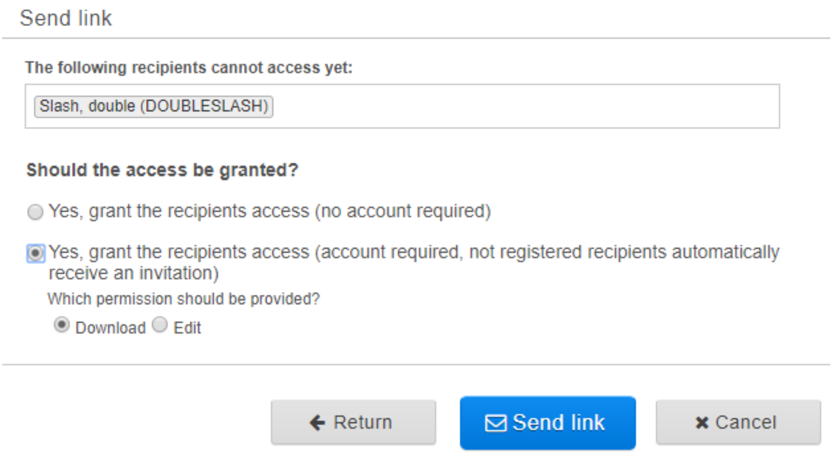


Figure 29: Send link from folders

5.3 Status

Each file uploaded to the Business Filemanager is scanned for viruses using an integrated virus scanner (usually Clam AV). The virus check is also performed cyclically across the entire system. If viruses are detected during the check, the file is replaced by a readme file, otherwise the status is displayed with the check date and a green tick.

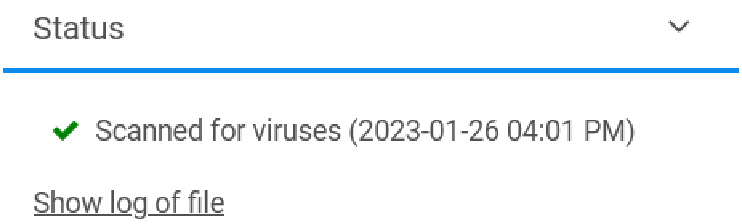


Figure 30: Virus scan

5.4 Delete files and folders

Delete files and folders: To delete files or folders, mark the corresponding resources by placing a check mark in each of them and then click the "*Delete*" button.

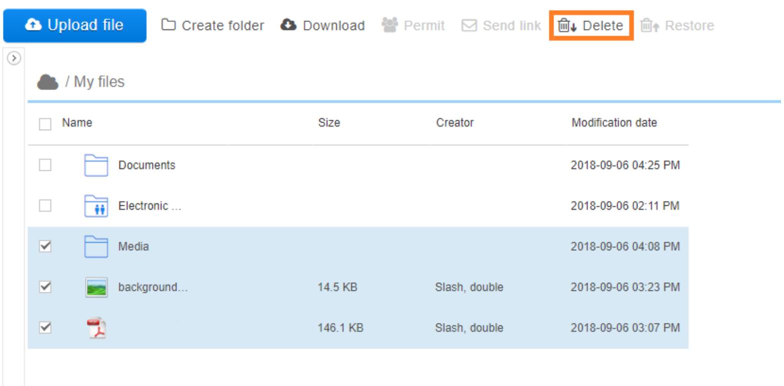


Figure 31: Delete files / folders

Confirm with "OK" in the following pop-up window.

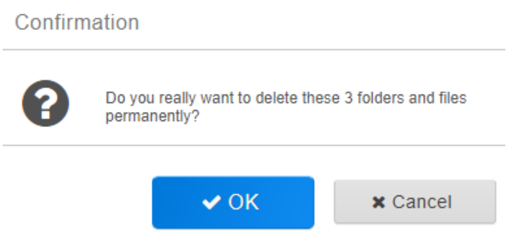


Figure 32: Agree deleting

Note: The files or folders are initially only moved to a recycle bin. If you want to remove the resources from your cloud permanently, first click on the trash can icon in the respective folder to display deleted files or folders.

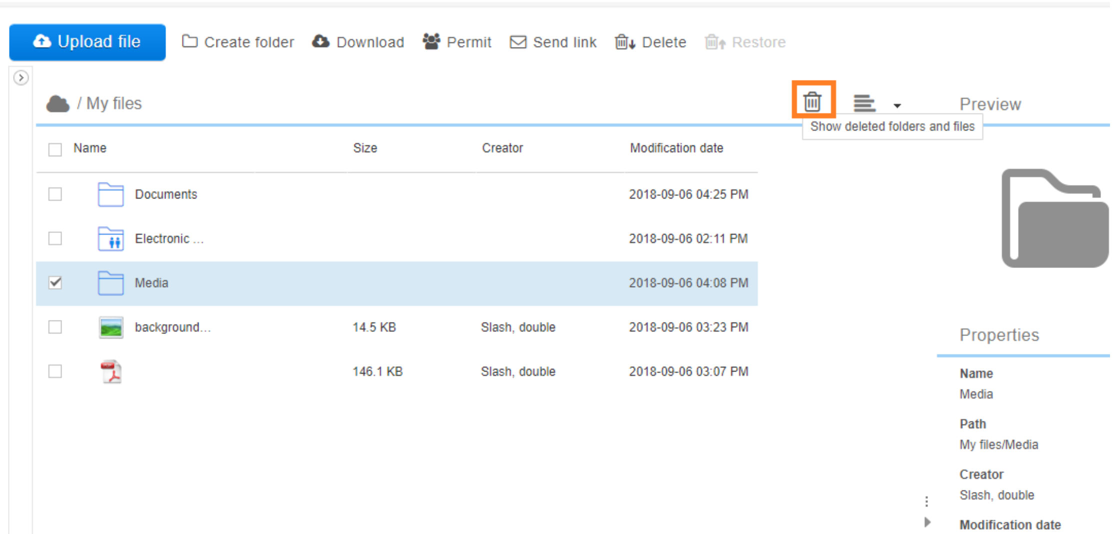


Figure 33: Show deleted folders and files

Now select the deleted resources (grayed out entries) and then click on "*Delete permanently*".

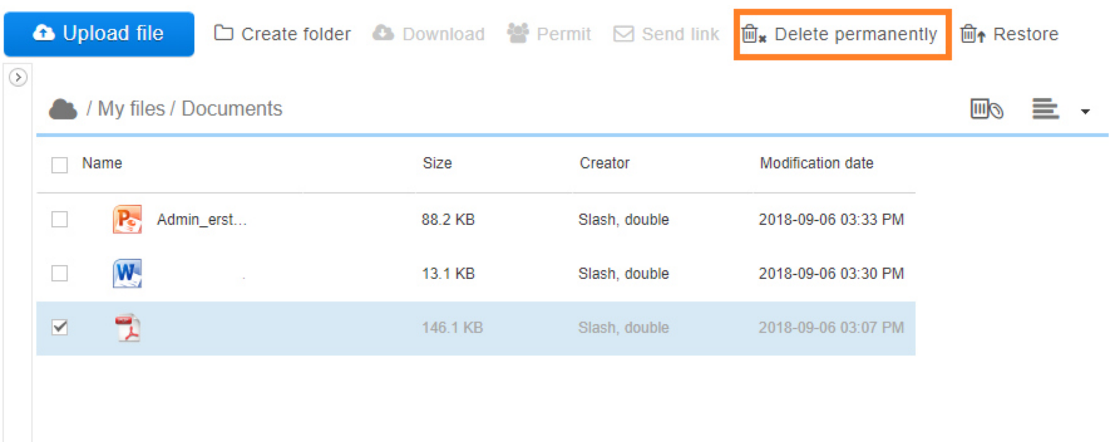


Figure 34: Delete ressources permanently

5.5 Restore files and folders

Restore files and folders: To restore deleted files or folders, proceed in the same way as for final deletion: First click on the trash can icon in the respective folder (Figure 33), select the corresponding entries and then click on "Restore" (Figure 35, Figure 36)

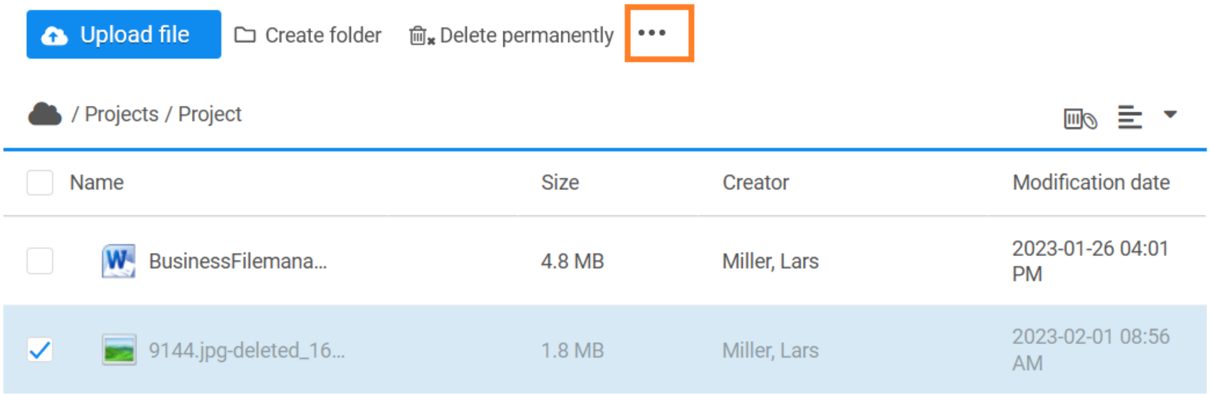


Figure 35: Restore (1)

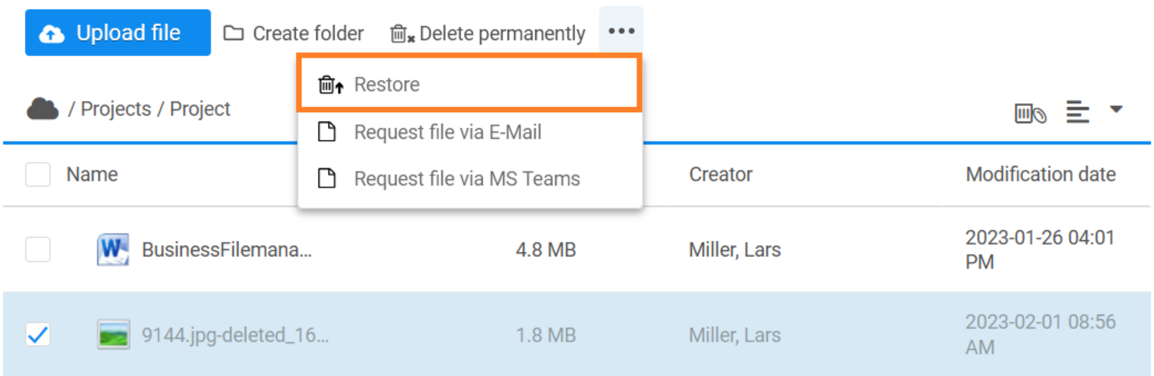


Figure 36:Restore (2)

6 Project folder

In addition to the purely personal "My Files" area, which contains a user's personal files and folders, there is also the "Projects" area.

In companies, it often happens that employees need to access shared (project) files. The subfolders and files located in the "Projects" folder are created by an authorized person and shared with specific user groups (e.g. sales, marketing, development, etc.). They are user-independent, i.e. they are not lost if the creator is deleted from the system, as is the case with "My Files". This makes the "Projects" folder an integral part of your cloud domain (comparable to a shared file server in the company).

The functionalities described in chapters 2 to 5 also apply to the "Projects" area.

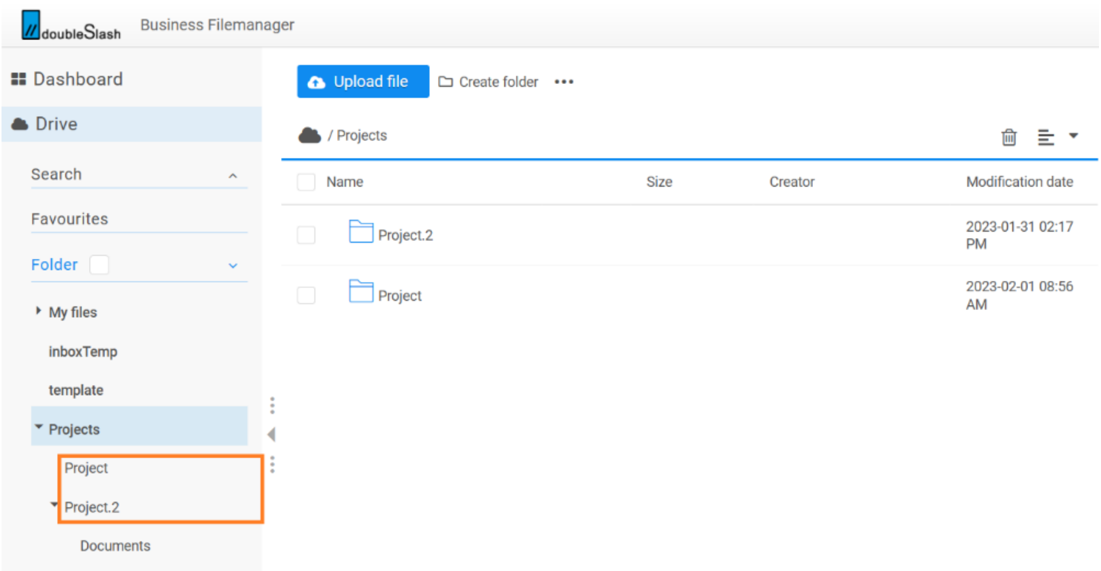


Figure 37: Project folder

If a user is not yet authorized for a project folder, the projects folder will not appear. For more details, please refer to the Administrator's Manual.

6.1 History log for files and folders

You can view a history log for the files and folders in your cloud to see what actions have taken place on each resource.

To do this, select a file or folder and click "*Show Log*" in the Log section in the lower right area of the screen.

The log contains the timestamp, user and action. Thus, any event can be traced.

The entries in the log are kept for 180 days. Entries older than 180 days are no longer displayed in the log. Individual time periods can be agreed upon.

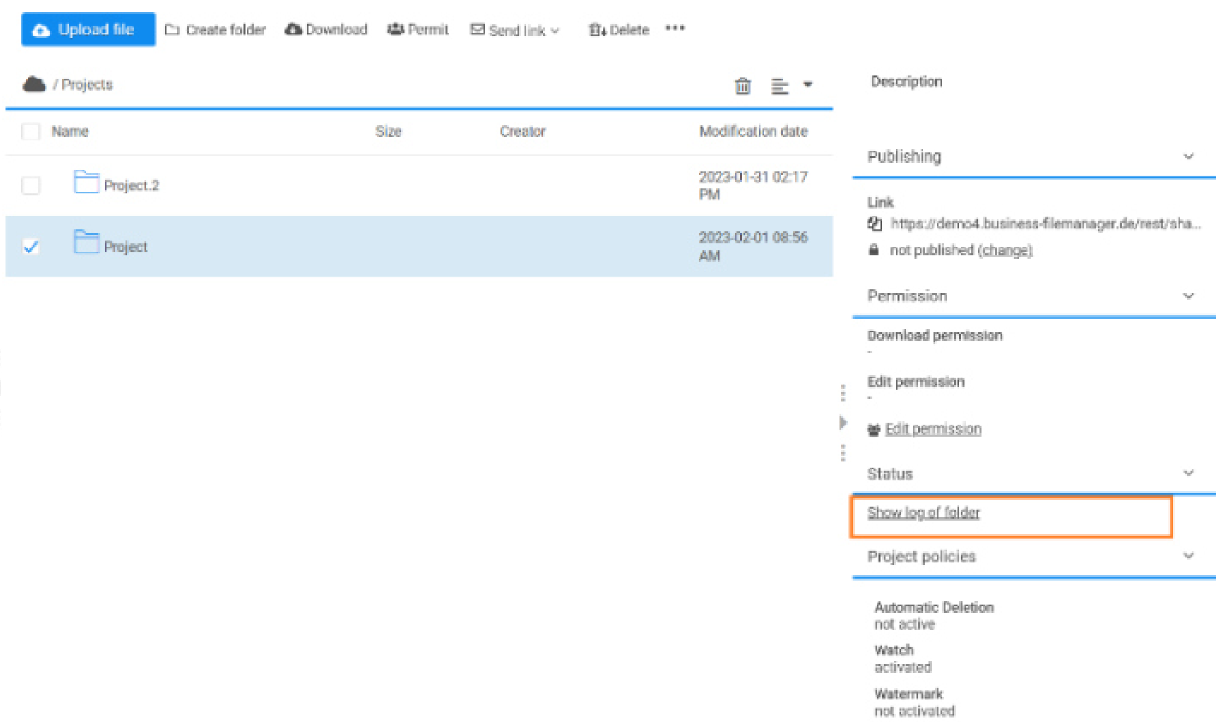


Figure 38: History log (1)

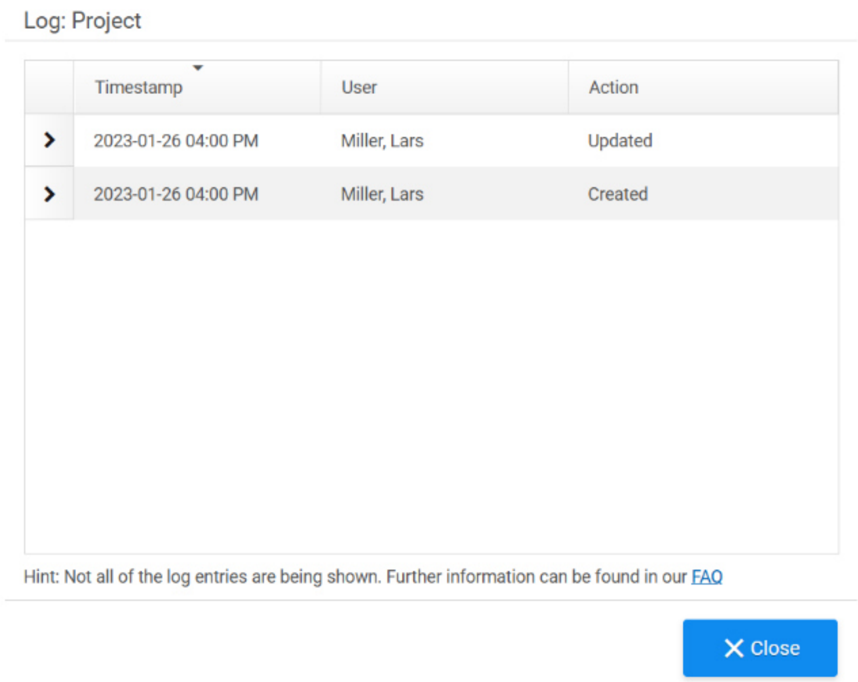


Figure 39: History log (2)

7 Menu functionalities and other clients

Via the menu (user symbol) in the upper right area of the screen, you can access the other functions.

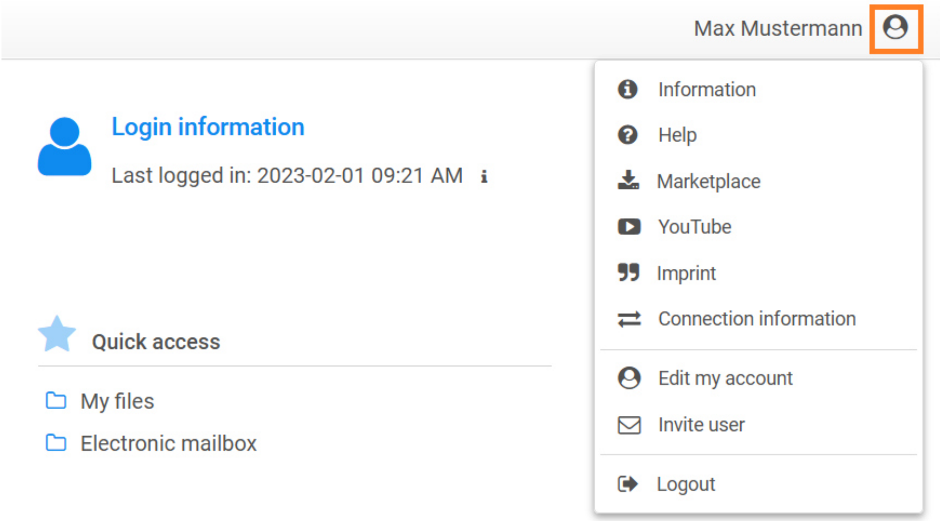


Figure 40: Open menu

An overview of the functions:

- **Information:** This takes you to the general information.
- **Help:** Opens the Business Filemanager Help Center.
- **Marketplace**: Takes you to the download area for Business Filemanager tools and documents.
- **YouTube**: Opens the Business Filemanager YouTube channel, where you can find some tutorials about its use.
- **Imprint**: Opens the imprint.
- **Connection information**: Shows the connection information for connections with the WebDAV interface (see Chapter 7.2) or other Business Filemanager apps.
- **Edit my account**: Edits the user account (see Chapter 7.1).
- **Logout**: Logs the current user off the system.

Note: The menu may differ depending on your admin's settings.

7.1 Edit user account

To change your user-specific data, open the menu in the upper right area of the screen and select "Edit my account" (Figure 41).

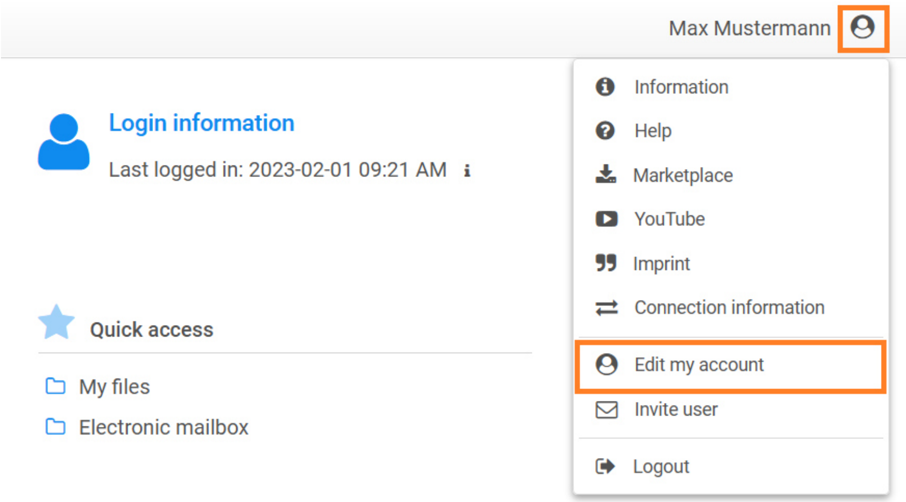


Figure 41: Edit my account

In the following window (Figure 42), you can now use the individual tabs to change your personal details, your password or the settings for the language and time zone.

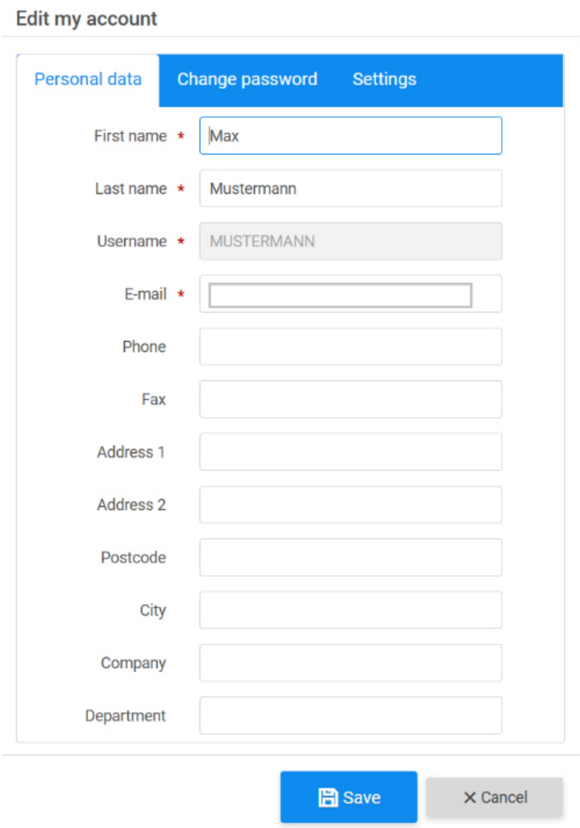


Figure 42: Edit user account

7.2 Connecting your cloud via WebDAV (Windows)

You can mount Business Filemanager as a network folder in Windows using the WebDAV interface.

There are several ways you can mount your Business Filemanager account. You have free choice and can do this according to your personal taste.

Open the Windows Explorer (Windows key + E) and right-click on Computer (This PC)

Option 1: Connect network drive

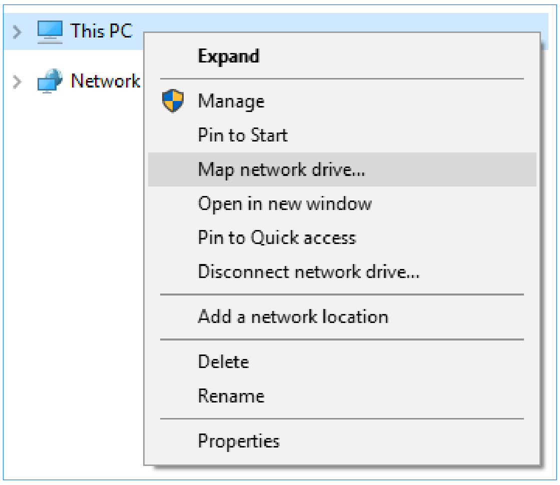


Figure 43: WebDAV connection (1)

A command prompt opens. Choose a free drive letter and please enter the path to the Business Filemanager server.

Option 2: Add network address

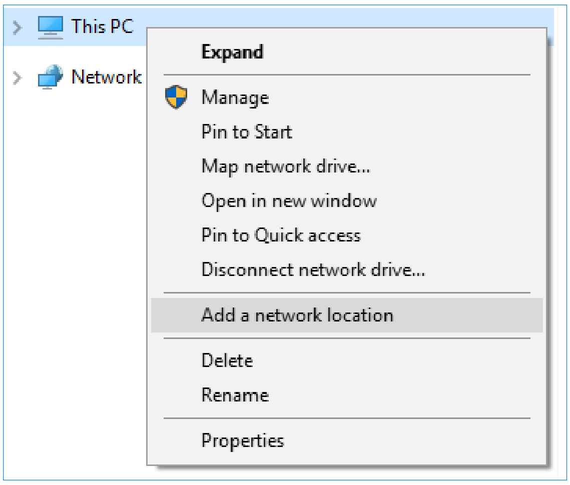


Figure 44: WebDAV connection (2)

Confirm the first pages of the following dialog and enter the path to the Business Filemanager server as the network address.

Server path: This information can be found in the Business Filemanager WebApp in the right pane under the "Connection information" item.

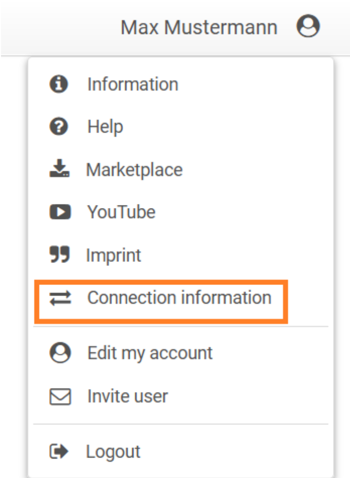


Figure 45: WebDAV connection (3)

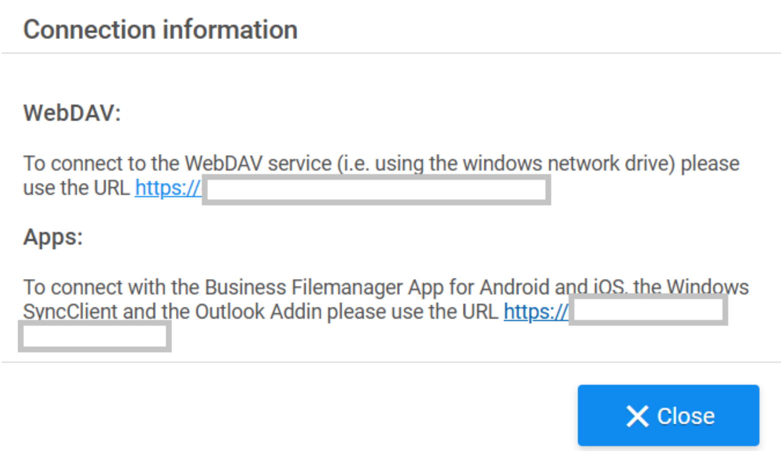


Figure 46: WebDAV connection (4)

You will be prompted to enter the Business Filemanager account name and the Business Filemanager password you assigned. Finally, enter a name for the connection or accept the name suggested by Windows (the name is used for display in Windows Explorer). Finish the wizard.

The Business Filemanager account is now mounted in Windows Explorer and can be used like an ordinary hard disk.

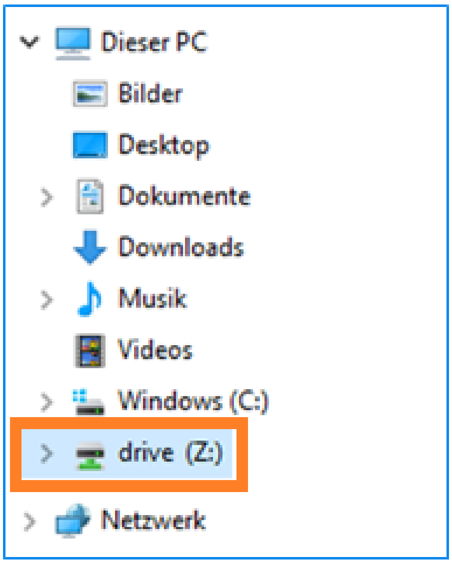


Figure 47: WebDAV connection (5)

7.3 Install Windows SyncClient

With Business Filemanager SyncClient you can easily make files available and work with them offline - even if there is no network connection at the moment.

Files in the local Business Filemanager directory are automatically synchronized with the Business Filemanager server and backed up. This allows the files to be made available to other devices or people as needed.

Note: Does not serve to synchronize all available files from the cloud.

In Business Filemanager, click the user icon in the upper right corner and select "Marketplace" (Figure 48).

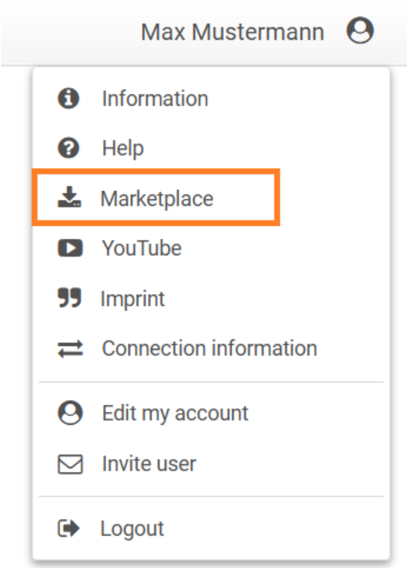


Figure 48: Installation (1)

You will be automatically redirected to the Business Filemanager homepage where you can download the SyncClient installation file.

Go to Windows Explorer and open the folder where you saved the file. Open the file with a double click. Once you launch the downloaded installation file, you will be accompanied by our installation assistant. (Figure 49: Installation)

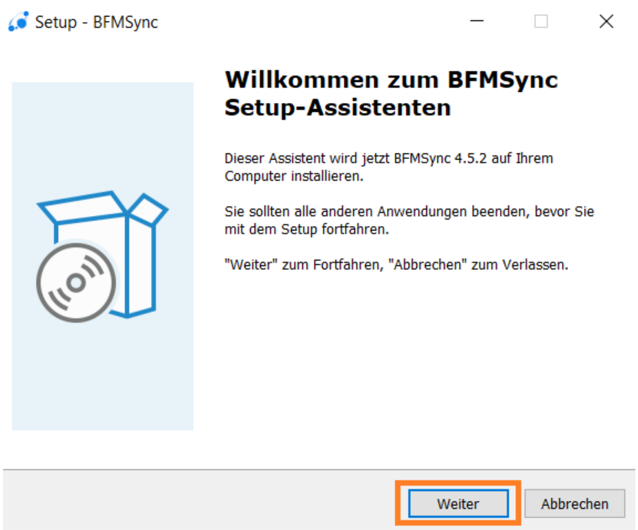


Figure 49: Installation

7.4 Install Outlook-Add-In

With the Outlook-Add-In, you can easily and securely send large files (up to 10 GB) via e-mail, encrypt the files with a password and be notified as soon as the sent file has been downloaded. You don't even have to leave the familiar e-mail user interface.

To use it, you just need to be a Business Filemanager customer, have Microsoft Outlook installed, and download and activate the appropriate plug-in.

To install the add-in, click on the menu in the upper right corner of Business Filemanager and select "Marketplace" (Figure 50: Installation (1)).

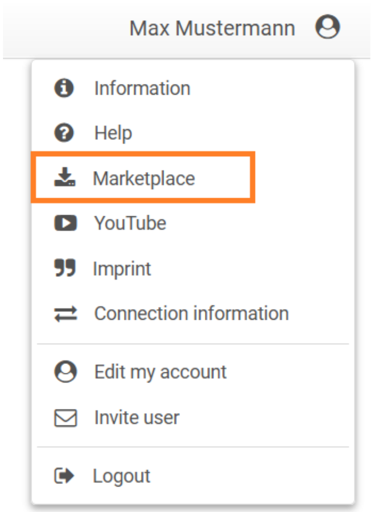


Figure 50: Installation (1)

You will be automatically redirected to the Business Filemanager homepage. Select the Outlook-Add-In here and download the installation file. The installation procedure is identical to that for SnycClient.

Before installation, make sure that your Outlook application is closed. Go to Windows Explorer and open the folder where you saved the file. Open the file with a double click. Once you launch the downloaded installation file, you will be accompanied by our installation assistant.

During the installation you will also be asked to install "VSTO Runtime", which is mandatory. The "VSTO Runtime" is needed to make the Outlook-Add-In executable for Outlook.

After successful installation Outlook can be opened again. When opening it, a message appears which you confirm with "Install". A tutorial is displayed, which guides you through the first steps. Under "File" > "Business Filemanager" >"Configure Server Connection" the connection to the Business Filemanager can be set up.

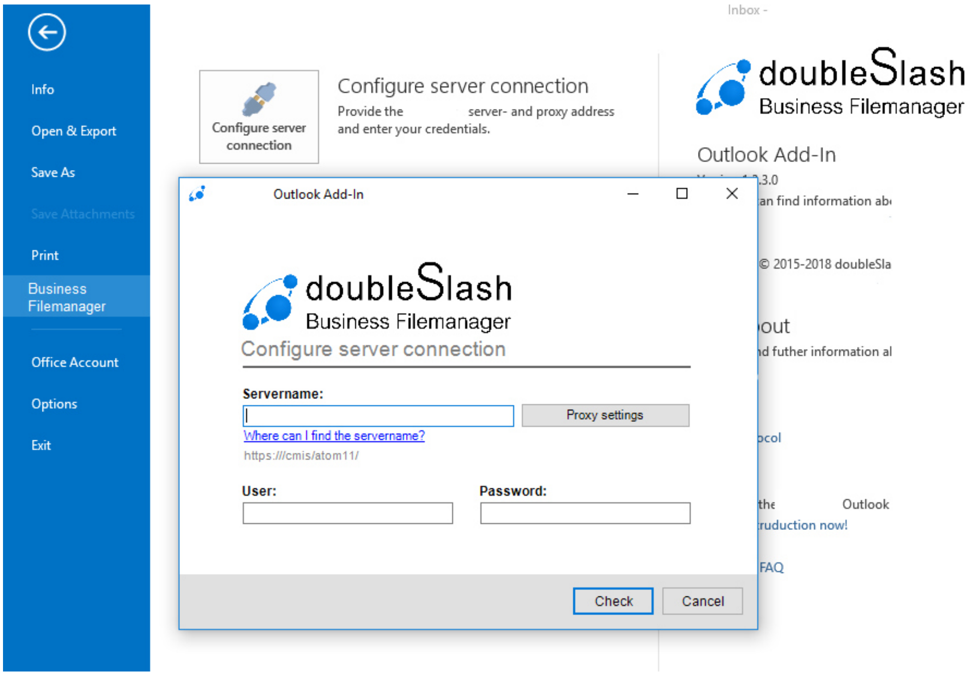


Figure 51: Enter server configuration

After your server connection is configured, you can select your options. Just click on "Options" and a window should open. Now you can select the location in the Business Filemanager where your attachments should be stored. You can also enter the expiration date of the storage.

8 Business Filemanager plugins / advanced functionalities

The Business Filemanager web app has an internal plugin system that allows you to extend the functionality of your cloud with plugins. As an administrator, you can add or remove plugins as you see fit. Please refer to the administrator's manual for more information.

Note: The following functions are only visible if the corresponding plugins have been installed and activated by the administrator.

8.1 Watch: Watch files and folders

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

To monitor a file or folder for the respective event, select the corresponding resource and press the right mouse button.

Now select "Watch" and then the respective event ("Download" for files, "Upload" for folders).

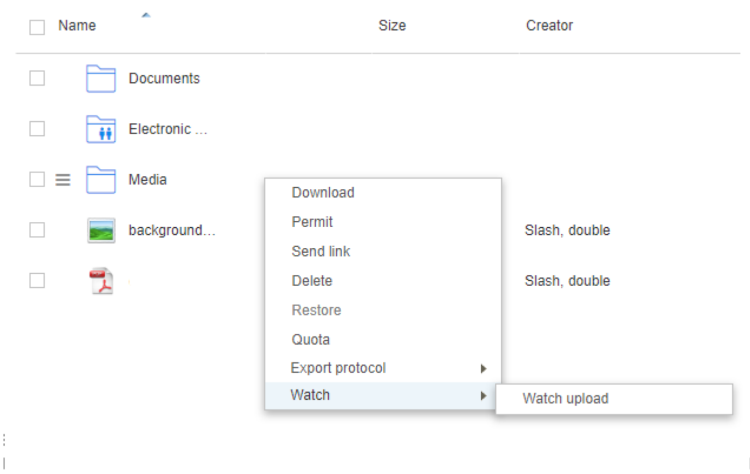


Figure 52: Watch folder (1)

Alternatively, click the Watch icon that appears as soon as you select a resource

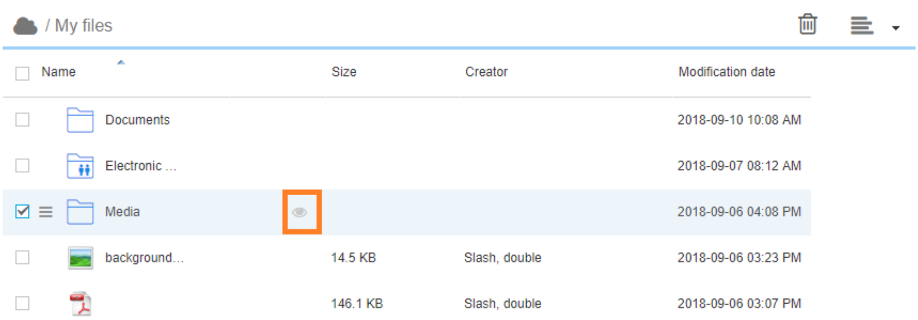
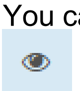


Figure 53: Watch folder (2)

Note: You can recognize a resource marked for observation by the activated observation icon. 

8.2 Inbox: The electronic mailbox

This plug-in function allows to send external (not registered) persons, files and folders to registered Business Filemanager users. These are then stored in the recipient's "Electronic mailbox" folder, which you can find in the parent "My files" folder.

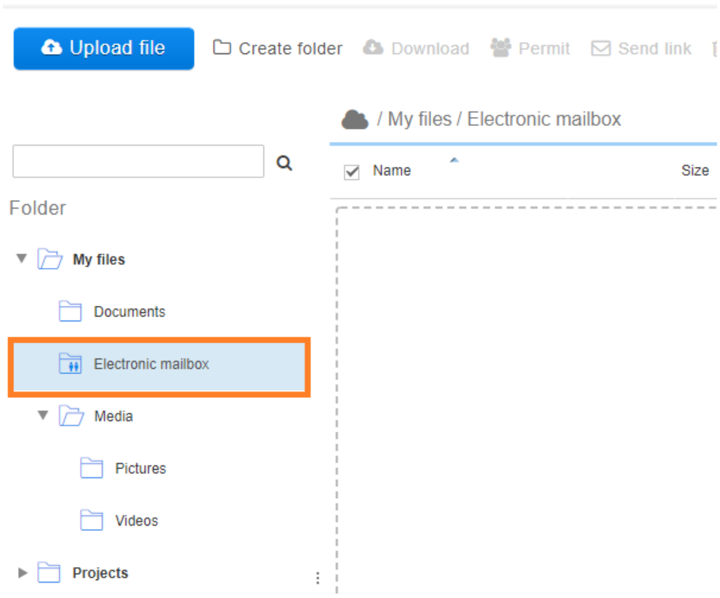


Figure 54: The electronic mailbox

To send files or folders to a registered user as an external user, proceed as follows:

Alternative 1:

- Open your browser and call up the URL of your web application. Then click the "Go to electronic mailbox" button (Figure 55: Inbox (2)).

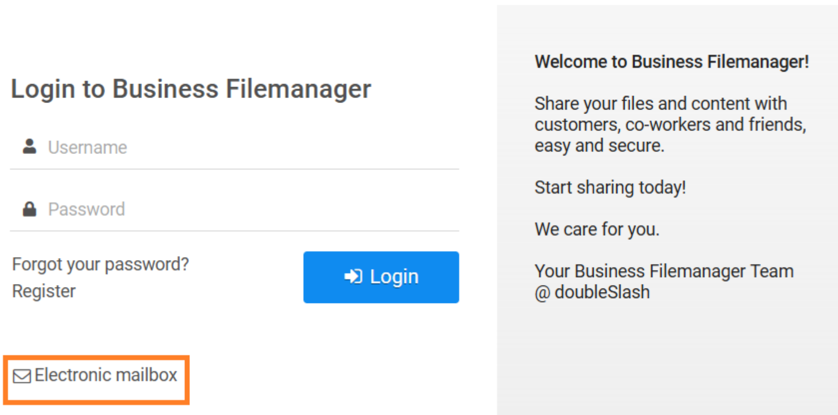


Figure 55: Inbox (2)

Or: Open https://<your drive URL>/inbox.zul. This will take you directly to step 2.

- Enter your e-mail address and that of the recipient and confirm by clicking "Check" (Figure 56).

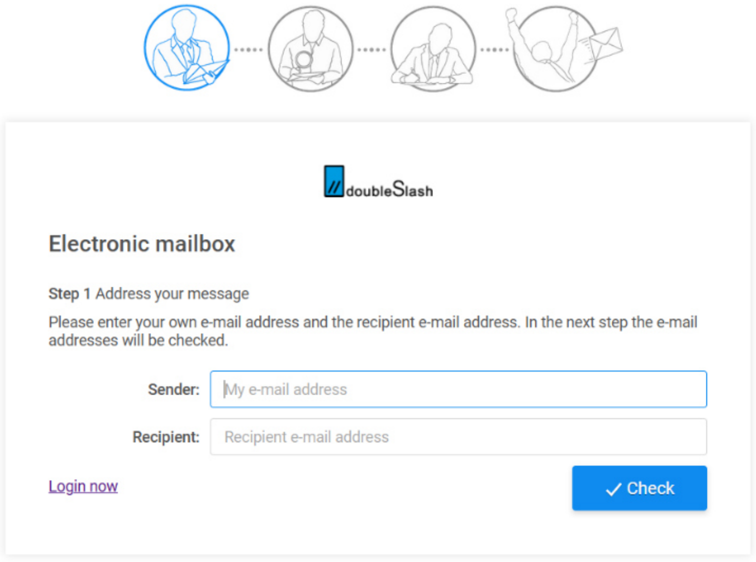


Figure 56: Inbox (3)

Alternative 2:

With this function you can create a link to the inbox where the recipient field is already entered and can no longer be changed. This allows you to create parameterized Inbox URLs where the user only has to fill in the sender field.

For this it is necessary to extend the Inbox URL with "?recipientMail=value". The question mark is necessary so that the parameter "recipientMail" is recognized and as value an e-mail address must be specified, which should be in the recipient field.

It is important that e-mail is valid because the user cannot edit the recipient field.

You can do this as follows: you need the URL to your business file manager access, example to **https://my.calvadrive.de**. The inbox URL in this case would be: https://my.calvadrive.de/**Inbox.zul**. And by expanding it with the parameter and an email you get: https://my.business-filemanager.de/Inbox.zul**?recipientMail=kontakt@business-filemanager.de**.

Enter your e-mail address and confirm by clicking "Check".

Alternative 3:

This function allows a BFM user to request a file from a person. This particular person will then receive an email with a link where files can be uploaded. The uploaded files can be saved by the user who requested them. To do this, log in with your BFM user and select "Request File" from the menu area.

The recipient's email address must be entered for the file request. This link is limited to 2 weeks after sending the request, so files must be uploaded by the requested person, within this period. Optionally, a message can be sent (Figure 57 and Figure 58).

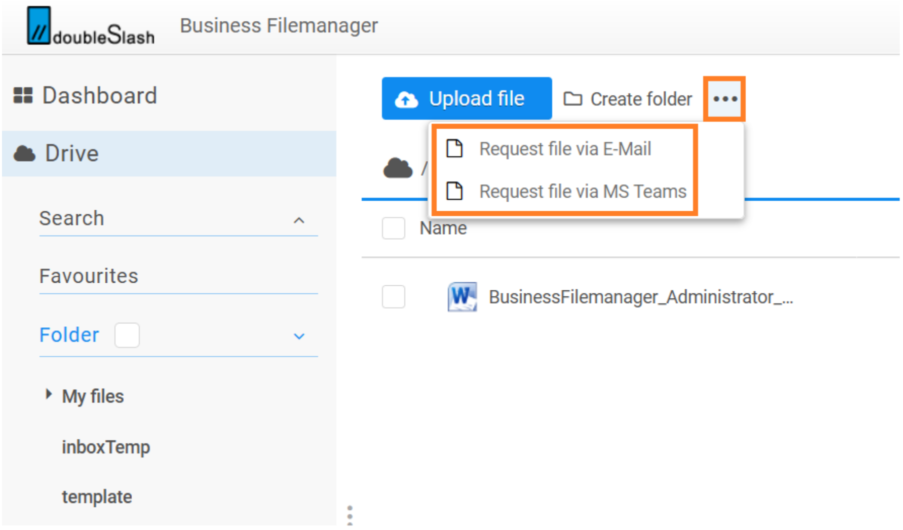


Figure 57: Request file (1)

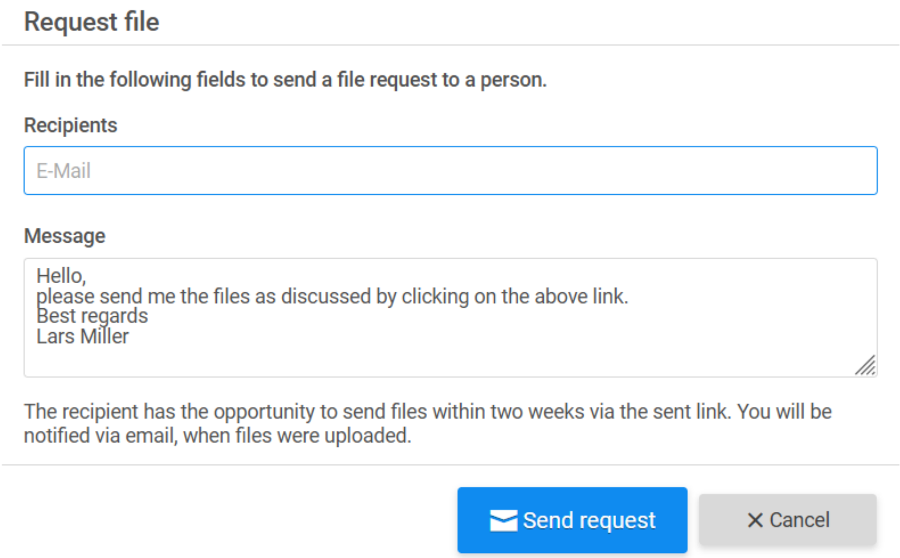
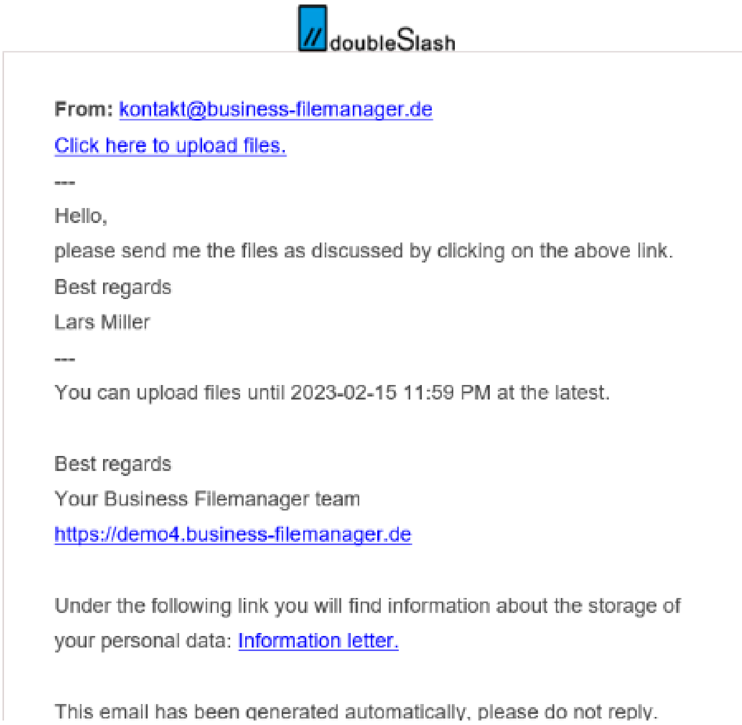


Figure 58: Request files (2)

Subsequently, the person without a business file manager account receives a verification e-mail with a link for the next step. This verification is performed only once, provided that the same browser is used the next time the electronic mailbox is used and the cookies have not been deleted (Figure 59).



From: kontakt@business-filemanager.de
Click here to upload files.

Hello,
please send me the files as discussed by clicking on the above link.
Best regards
Lars Miller

You can upload files until 2023-02-15 11:59 PM at the latest.

Best regards
Your Business Filemanager team
https://demo4.business-filemanager.de

Under the following link you will find information about the storage of your personal data: Information letter.

This email has been generated automatically, please do not reply.

Figure 59: Verfication E-Mail

As soon as one of the files is downloaded by the recipient, you will receive a notification. (Figure 60: Sending files to the electronic inbox).

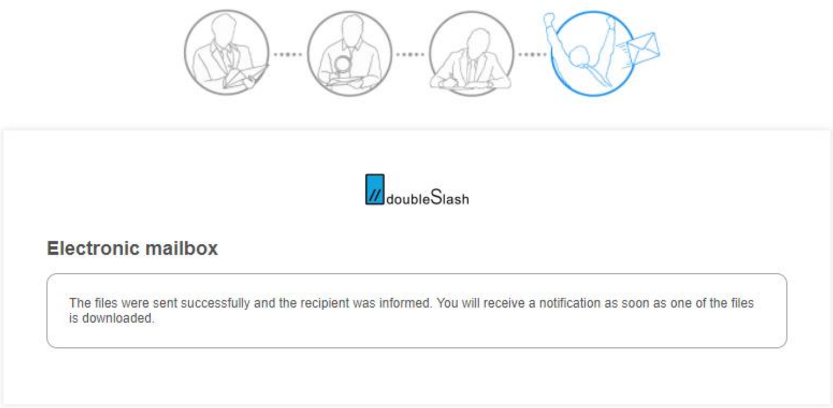


Figure 60: Sending files to the electronic inbox

8.3 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.

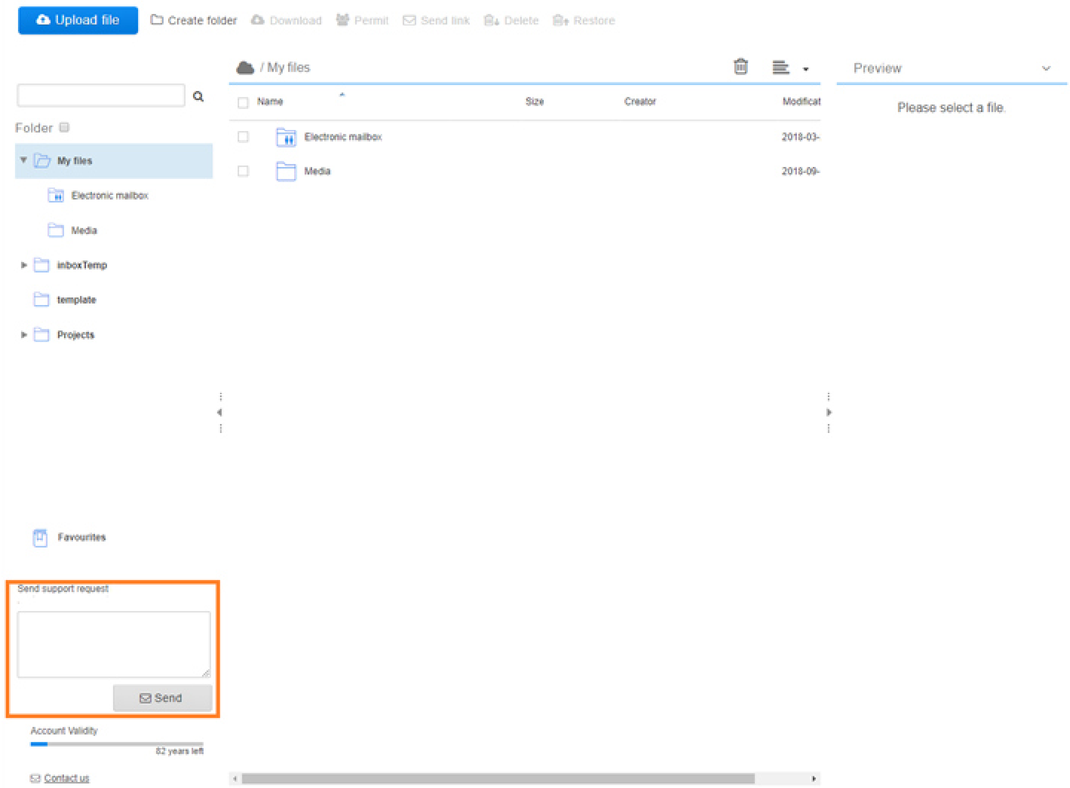


Figure 61: Support plugin

8.4 User Relation Repository Plugin

If the User Relation plugin has been activated by the administrator, only groups in which you are a member or subadmin are suggested to you. Suggestions of other users after entering the email address or username only appear after communicating with the respective user for the first time in any context (file sharing, sharing granted, etc.). This has the advantage that users of a system cannot see each other unless a connection (share file, send link) has already taken place.

Example: Send link (the user has been 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. (Figure 62).

If no connection has yet been established and the user is not in the same group, the email address entered will not be suggested as a recipient.

If the plugin is not activated, all users of the system can appear in the suggestion list (Figure 63).

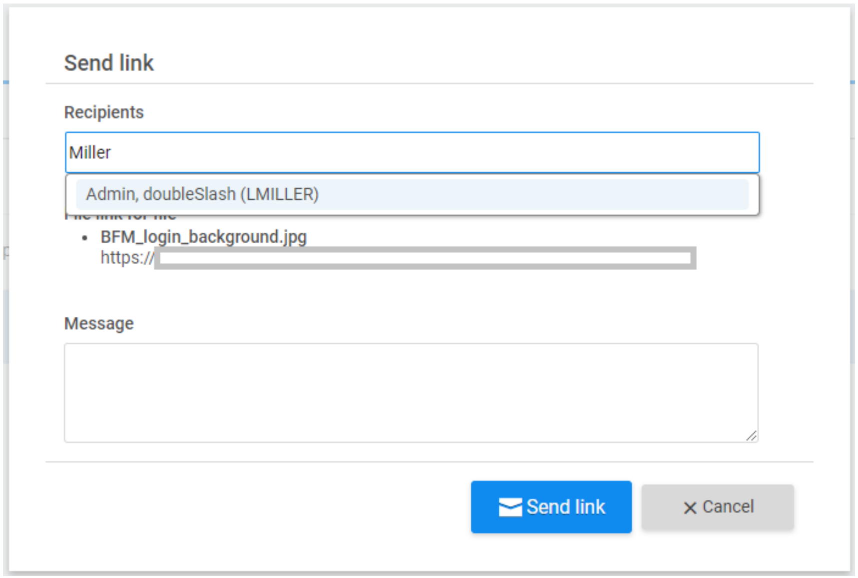


Figure 62: Connection was established

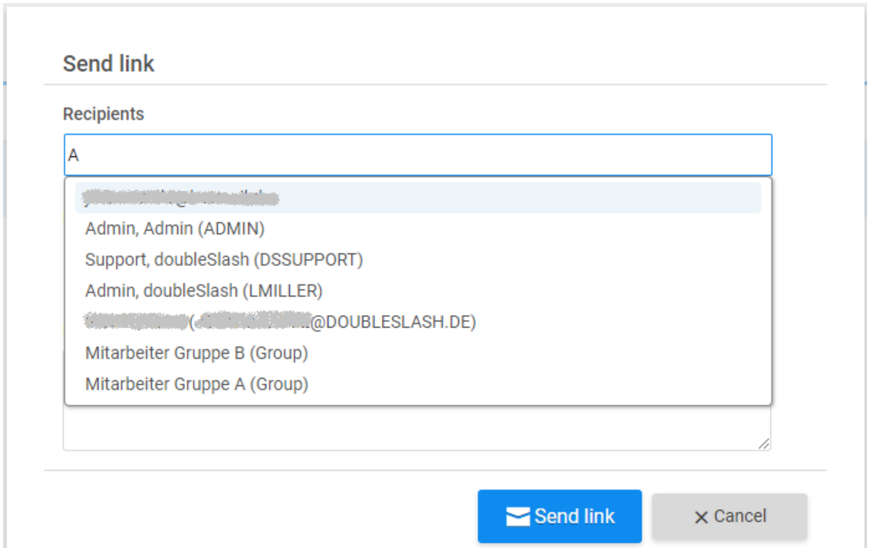


Figure 63 :Plugin not active

8.5 Registration Plugin: invite other users

With this function you have the opportunity to invite other users to use Business Filemanager. To do this, open the advanced functions via the user icon in the upper right area of the screen and select "Invite user".

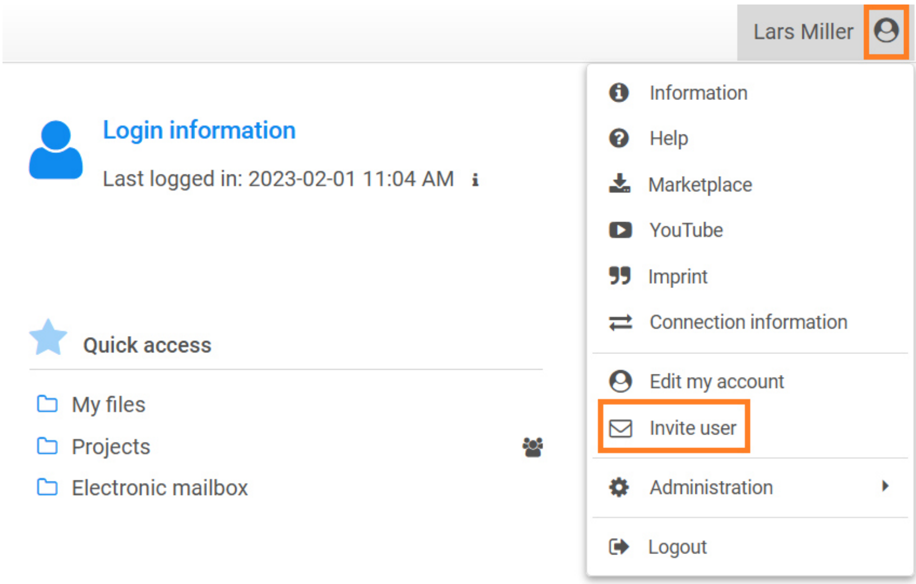


Figure 64: Invite user

You then specify the respective recipient and confirm by clicking on the "Invite" button. An account with access data for the recipient is automatically created and sent to the recipient by e-mail.

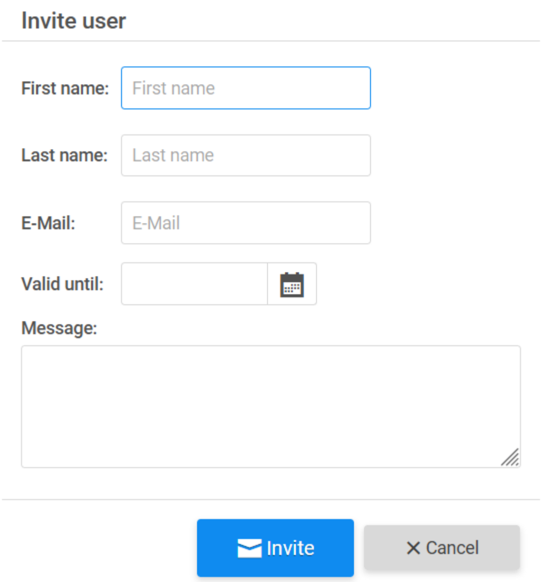


Figure 65: Fill in user information

8.6 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 useful to be informed about your appointments and deadlines in time.

How it works:

To set a reminder, select the desired file and click right to open the menu. Navigate to "Reminder." Another sub-menu will open. Here, choose whether you want to "set a reminder" or "delete a reminder".

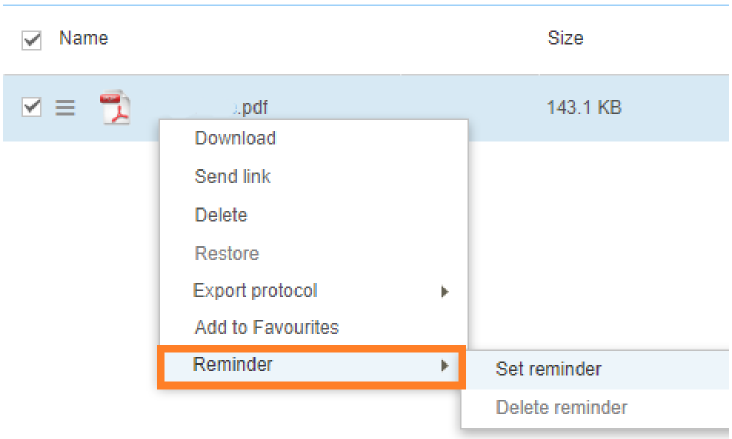


Figure 66: Set / delete a reminder

If you have selected "Set reminder", you can choose a reminder time in the following step:

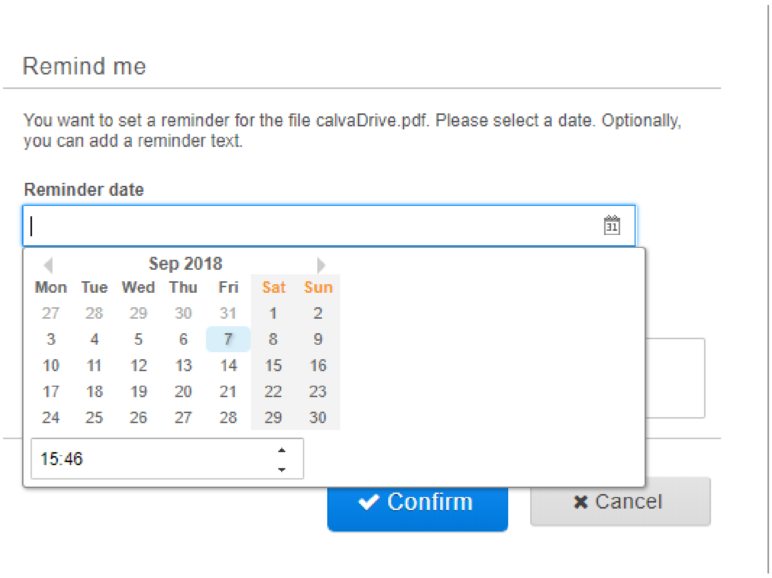


Figure 67: Reminder date

The information you enter under "Message" will be sent to you by e-mail as soon as the reminder time is reached.

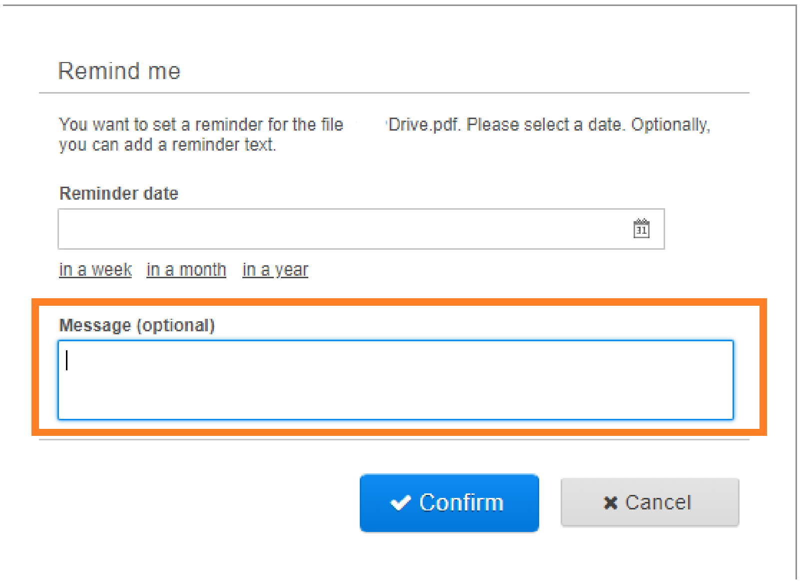


Figure 68: Reminder message

8.7 Versioning Plugin

The Version Plugin allows you 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 state without oversaving the current version, you can simply download the older version. This will not overwrite the current version with the older version.

How it works:

In order for versions to be created, the files must be synchronized with the SyncClient or updated via the web interface.

The Business Filemanager automatically creates a version of this file. If you select the desired file, a "Versions" information field appears in the right-hand column. All saved versions are displayed here.

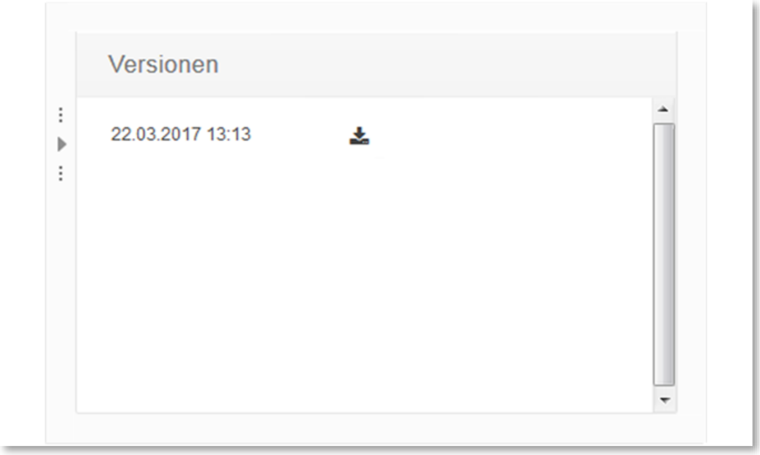


Figure 69: Viewing the versions

If a file is changed and the file is subsequently overwritten, a new version of this file appears after successful synchronization.

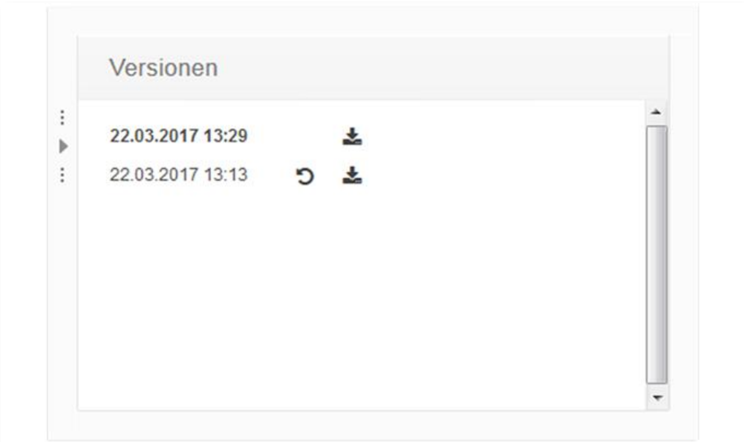


Figure 70: Viewing the versions (2)

If you want to overwrite the current version with an older version, click on the corresponding "Restore version" button.

Would you like to call up an older version without overwriting the current version? Click on the corresponding "Download version" button.

8.8 History exporter 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.

How it works:

To download the log for a file, select the desired file and right-click to open the submenu. Here, select "Export log" and then "For this file".

If you want to download the log for a folder, right-click on the desired folder. The submenu opens. Select "Export protocol" here and then "For this folder" or "All subfolders and files". Select "All subfolders and files" if you want to export the log for every file/folder located in the folder.

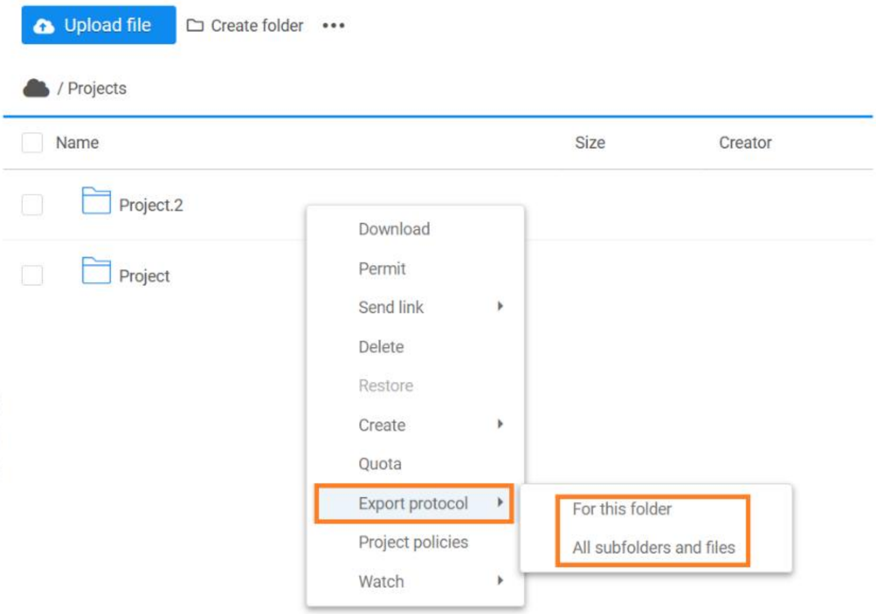


Figure 71: Export log

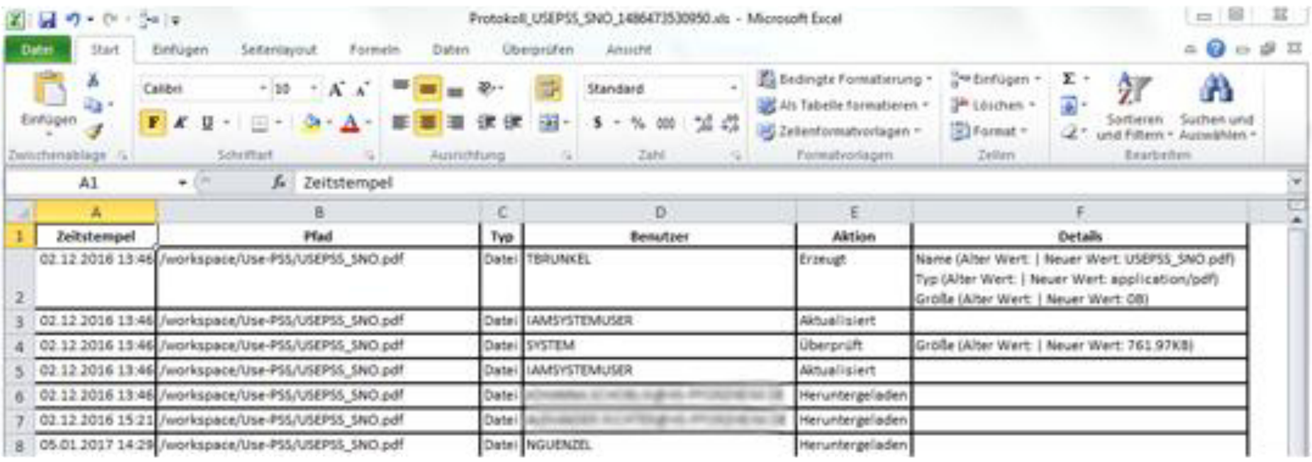


Figure 72: Protocol in Excel

8.9 Folder Quota Plugin

The Folder Quota plugin lets you set storage limits for specific folders, allowing you to control the storage of individual folders or the entire system.

Adjust quota:

If you want to specifically adjust the default quota for individual folders, you can right-click on the folder to open the context menu and use "Quota" to change the storage limit (Figure).

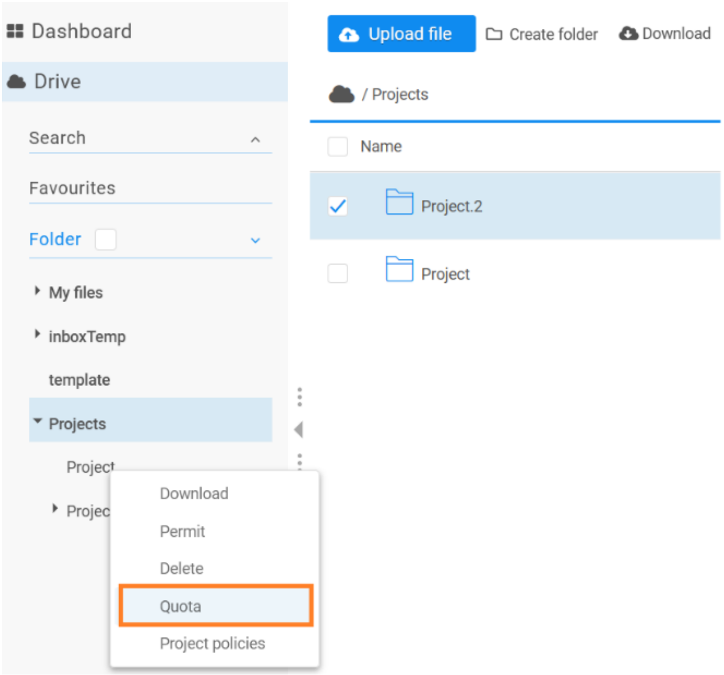


Figure 73: Adjust quota

Here you can also view the used space of a folder and customize quotas with just one click (Figure).

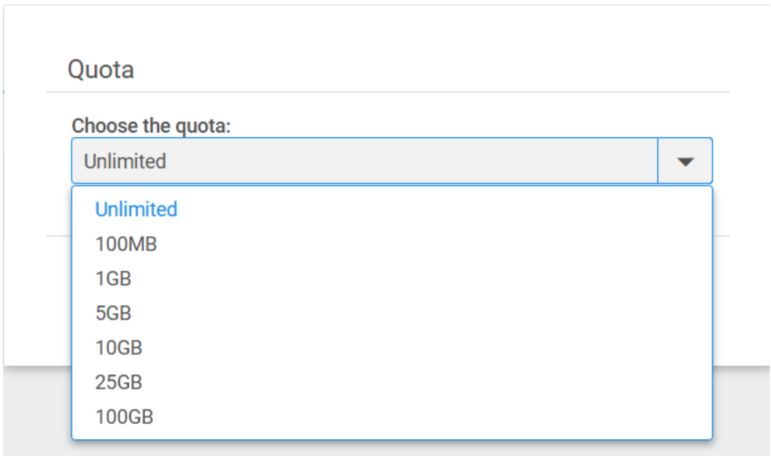


Figure 74: Show memory consumption

8.10 Search Plugin

With the search plugin you can shorten workflows and thus work faster and more efficiently. In addition, the usability is increased. Search is available both on the web and in the apps.

You can search your cloud for files, which is especially beneficial if you have a complex folder structure and many individual files.

Furthermore, you can use the full-text search to find file contents again.

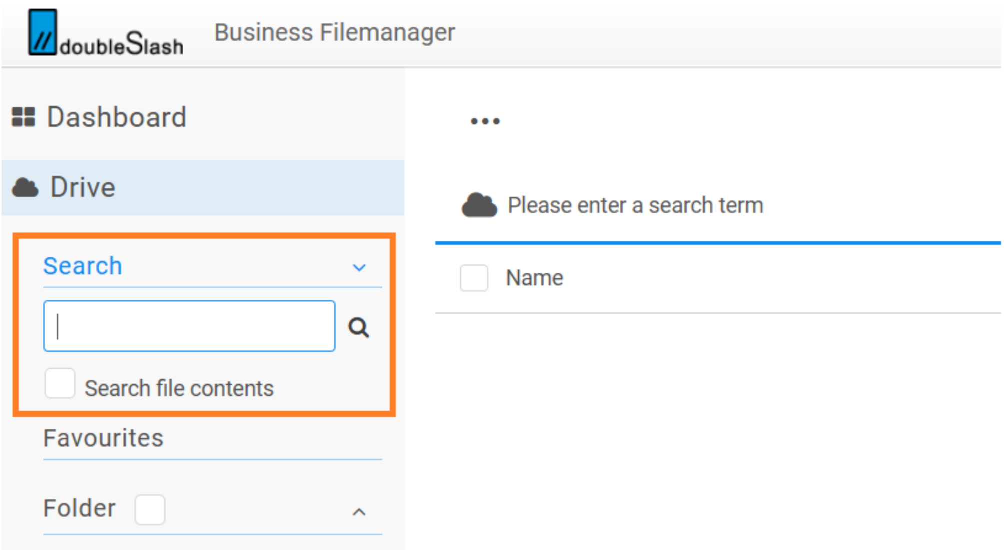


Figure 75: Search plugin

8.11 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 WebApp as well as in the Apps and thus have the files available offline.

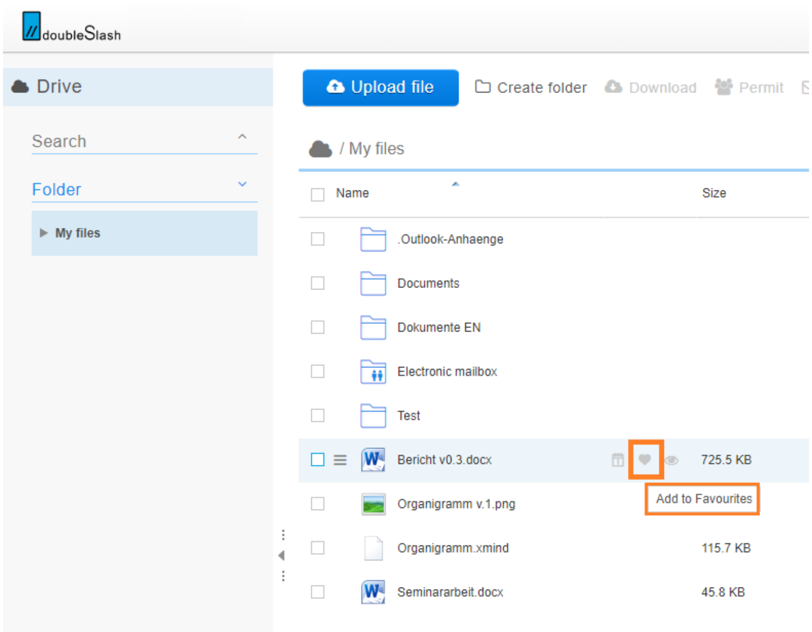


Figure 76: Add file to favorites

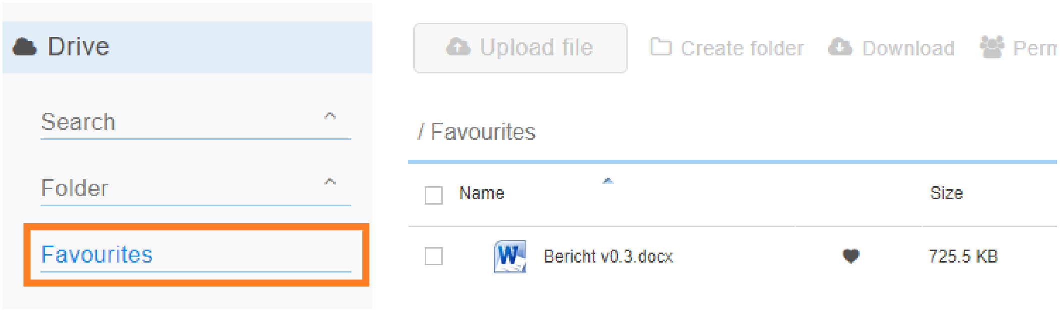


Figure 71: Favorites

8.12 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.

Select a document that you want to edit/present online. The button "Open file" will appear in the upper area. Alternatively, you can right-click on a file and then select "Open file" (Figure 72)

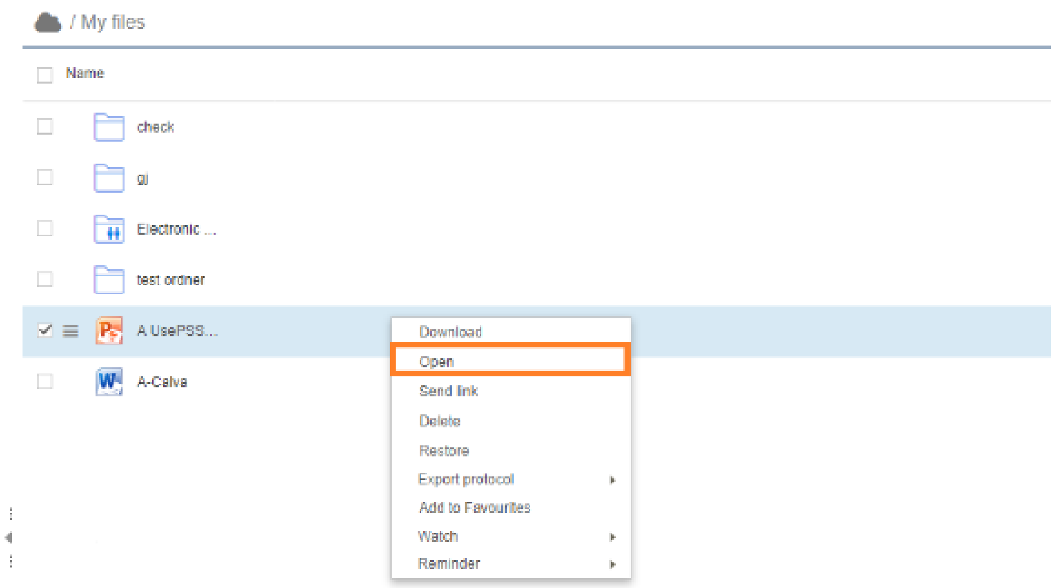


Figure 72: Open files via right mouse click

Now the file can be edited/presented online. The system automatically saves the latest version. (Figure 73: Latest version saved automatically)

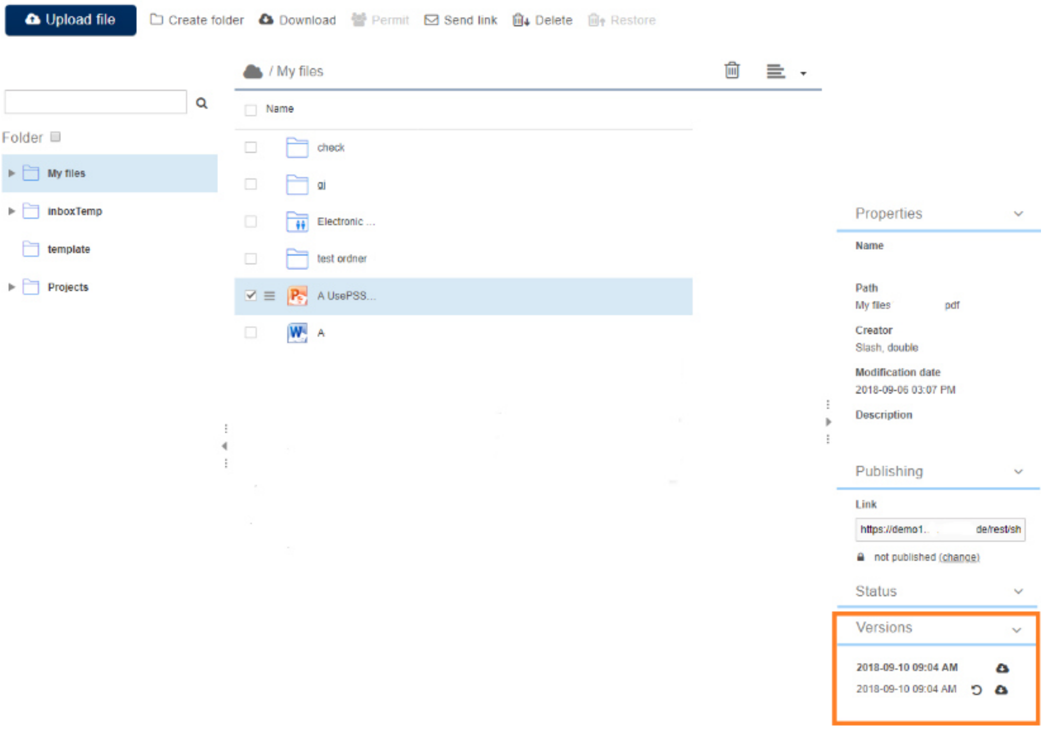


Figure 73: Latest version saved automatically

8.13 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 by 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.

To create a file online, click on the "Create" button. Now you can select which type of file you want to create and then edit online.

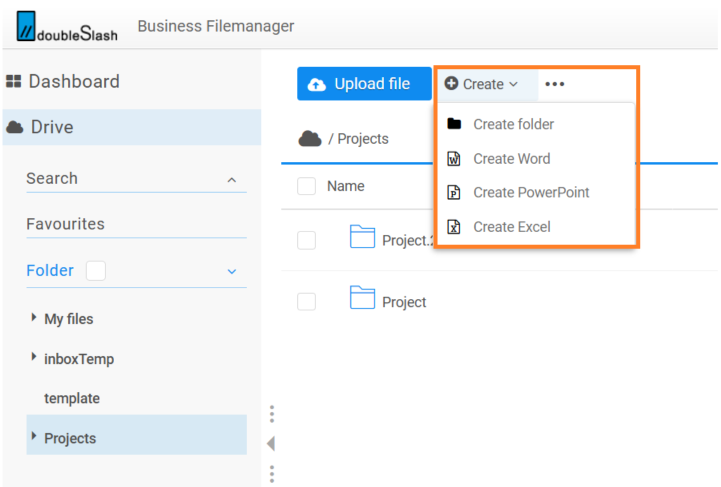


Figure 74: Create file

The system automatically saves the latest version if the versioning plugin (see chapter 8.7) is installed

8.14 SFTP - Plugin (for on-premises customers)

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.

A client such as WinSCP or FileZilla can be used to connect to the SFTP interface. The following data is required for the connection:

Hostname:

The domain of the system (e.g. my.business-filemanager.com).

Port:

The default port is 10022 - If necessary, this must be requested from the admin.

Username and password:

The same login data are used as for the login in the web interface.

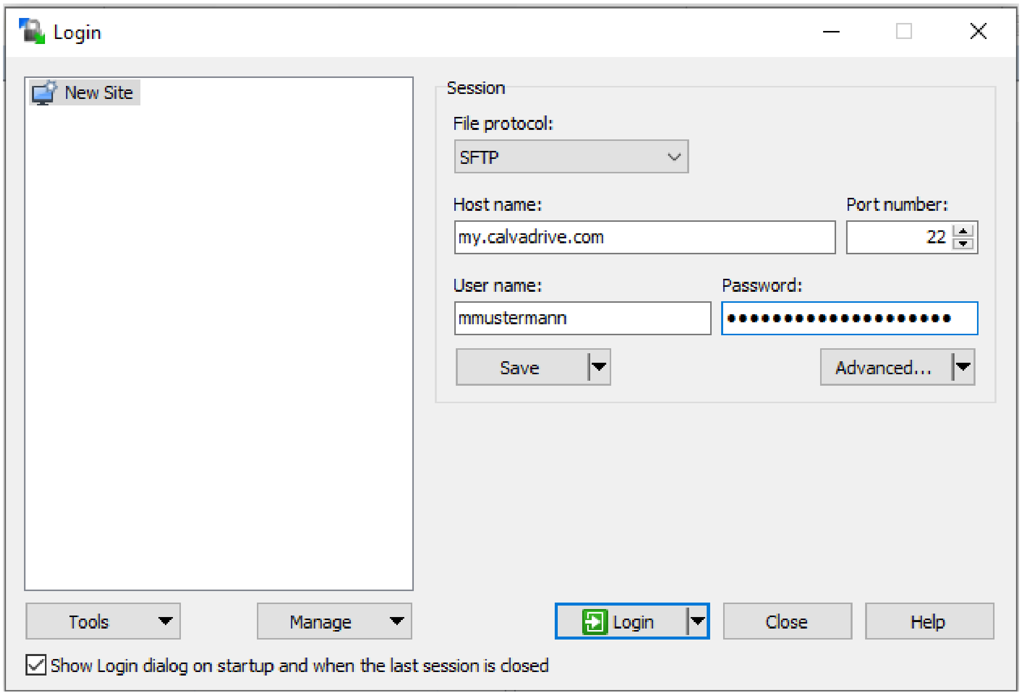


Figure 75: SFTP-connection with WinSCP

8.15 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 with 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.

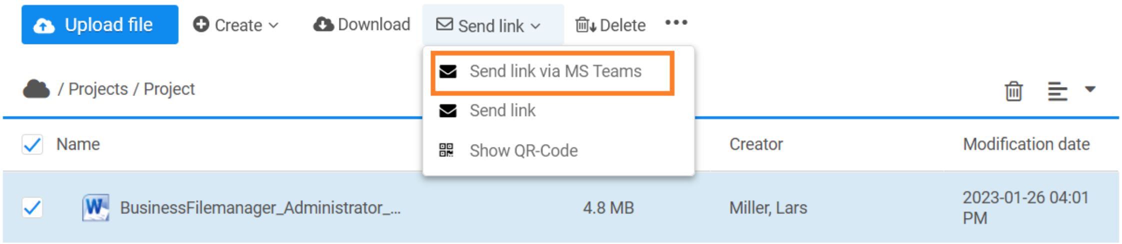


Figure 76: Send link

8.16 Whitelist Plugin

If the whitelist plugin has been activated by the administrator, you can only upload certain file formats.

An attempt to upload an unauthorized document triggers a corresponding error message.

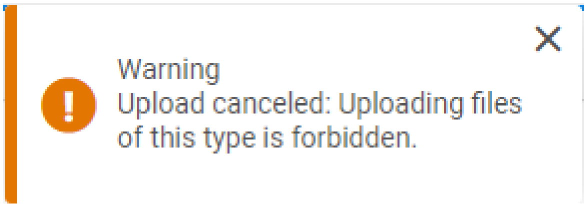


Figure 77: Whitelist error message

8.17 EntraID (formerly Azure AD) Plugin

If the EntraID (formerly Azure AD) plugin has been activated by the administrator, you are able to log in conveniently via EntraID. Two-factor authentication may be required.

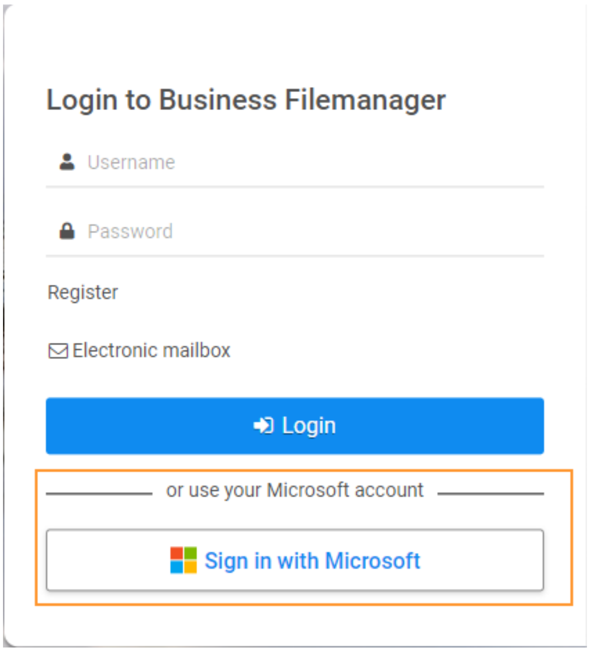


Figure 78: Login via EntraID

8.18 Data room policy – automatic deletion

This plugin deletes files in project folders after certain periods of time if this has been set actively by the administrator.

Note: Only super administrators or project administrators with edit permission can use this plugin.

Now select the desired folder with a right click and click on "Project Policies" (Figure 79: Enable automatic deletion).

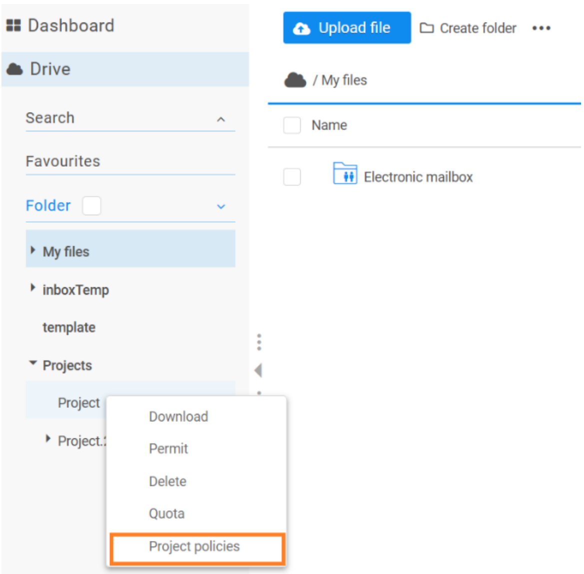


Figure 79: Enable automatic deletion

Here you can now choose whether you want to activate the policy for this folder. If you have activated the function, you can set the time of deletion and whether the selected file should be deleted permanently or not.

Note: If you select "Delete permanently", the selected file will be deleted permanently and not moved to the recycle bin.

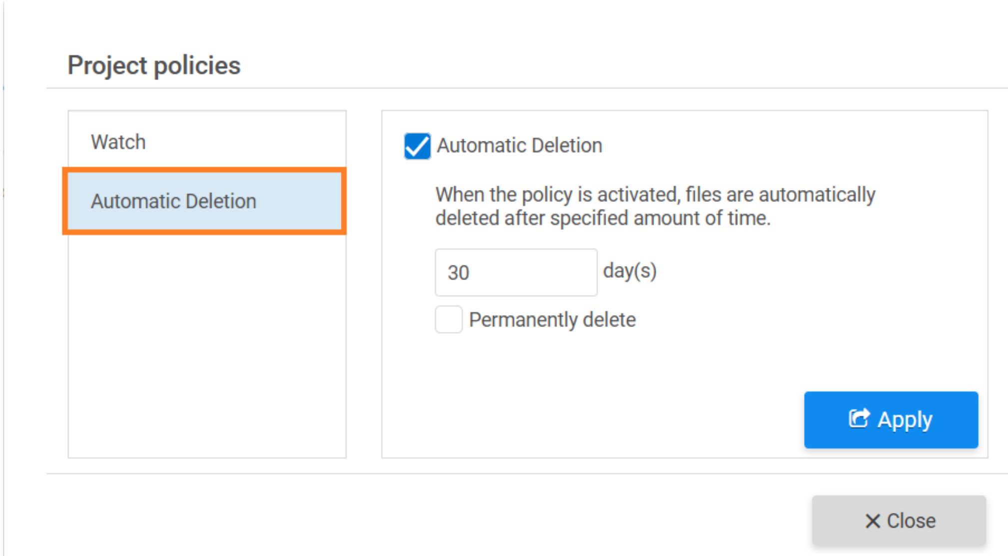


Figure 80: Automatic deletion

8.19 Data room policy – encryption

End-to-end encryption allows you to protect a data room and the data it contains. Only authorized users with whom the key has been shared can access the data.

Note: Only data room administrators can set up a policy per data room.

To activate encryption for a data room, it must be empty. To do this, do a right-click on the data room, open the project policies and activate encryption. You can then define a key for the data room.

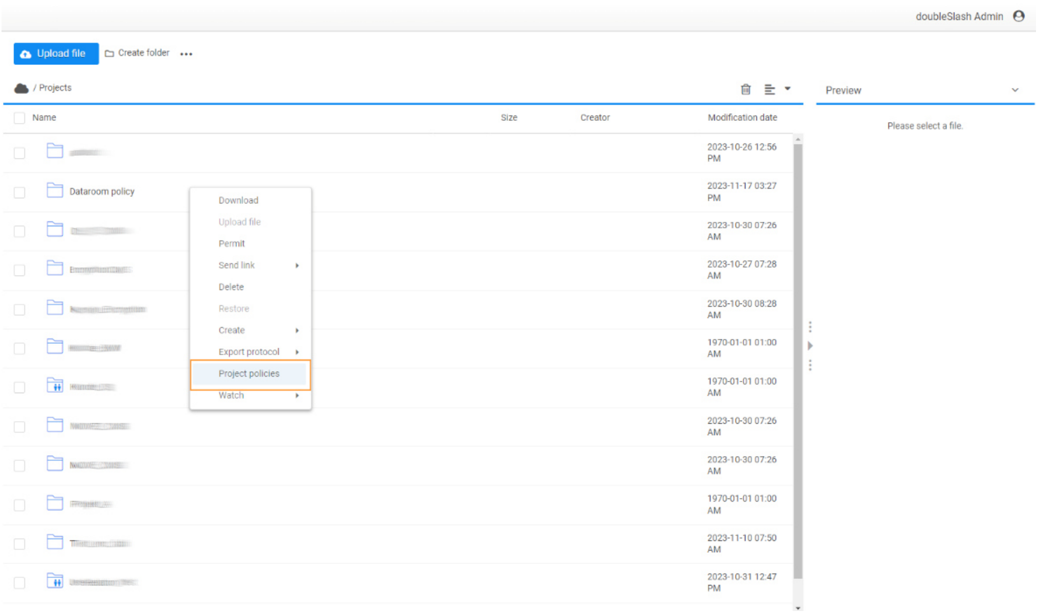


Figure 81: Project policies

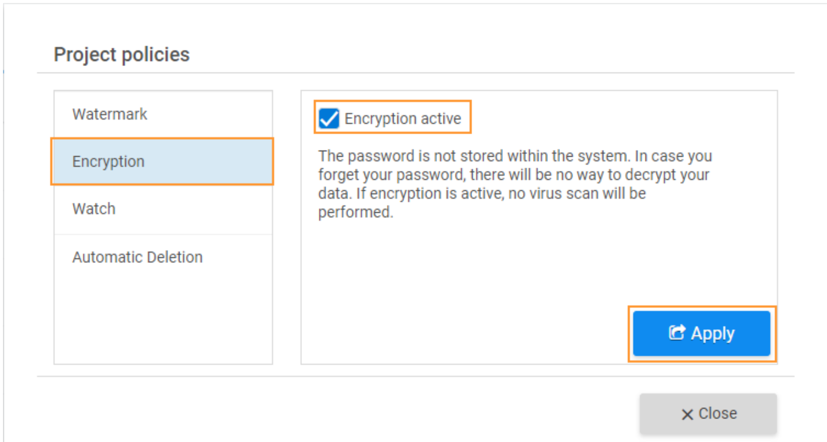


Figure 82: Activate encryption

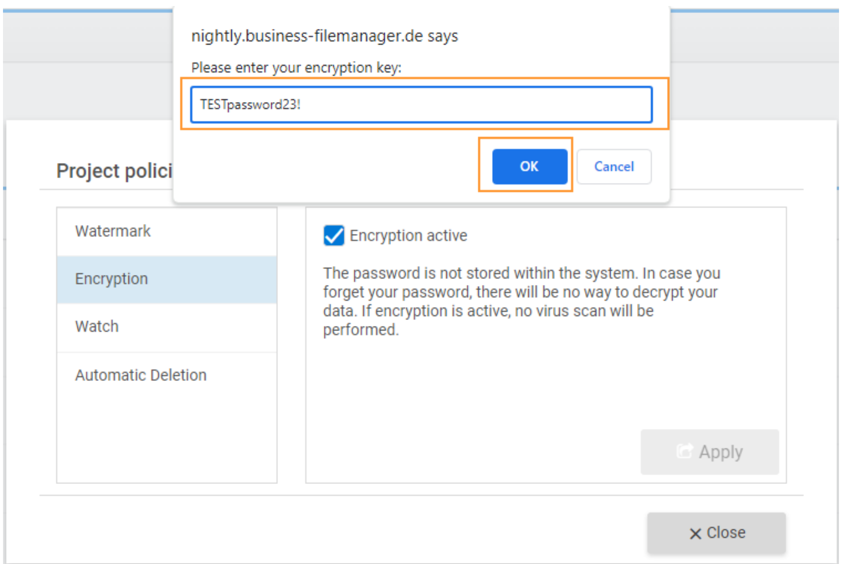


Figure 83: Setting the password for encryption

Note: The password needs to be between 16 and 32 characters long. It is important to keep the key safe, as access to the documents is no longer possible if it is lost.

If you want to deactivate the policy, you can do this here as well.

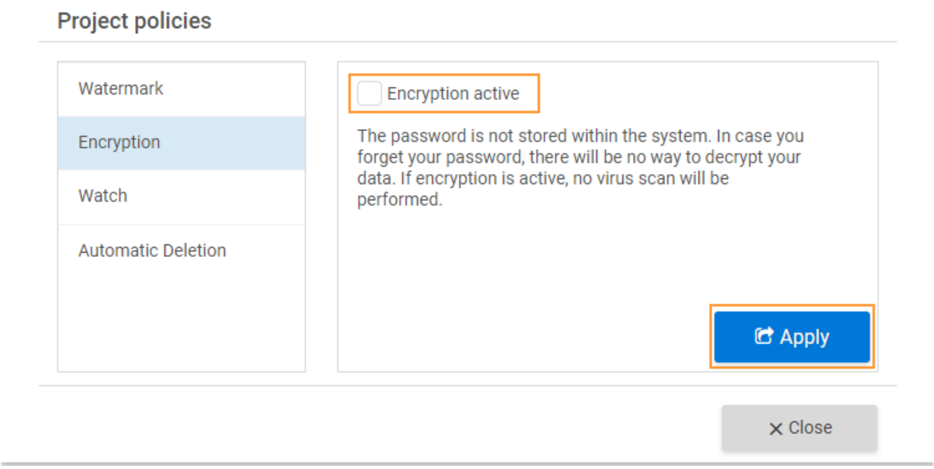


Figure 84: Deactivate encryption policy

Note: The policy can only be deactivated if the data room is empty.

In the 'Project policies' section on the right-hand side, you can quickly and easily determine whether an encryption policy is stored.

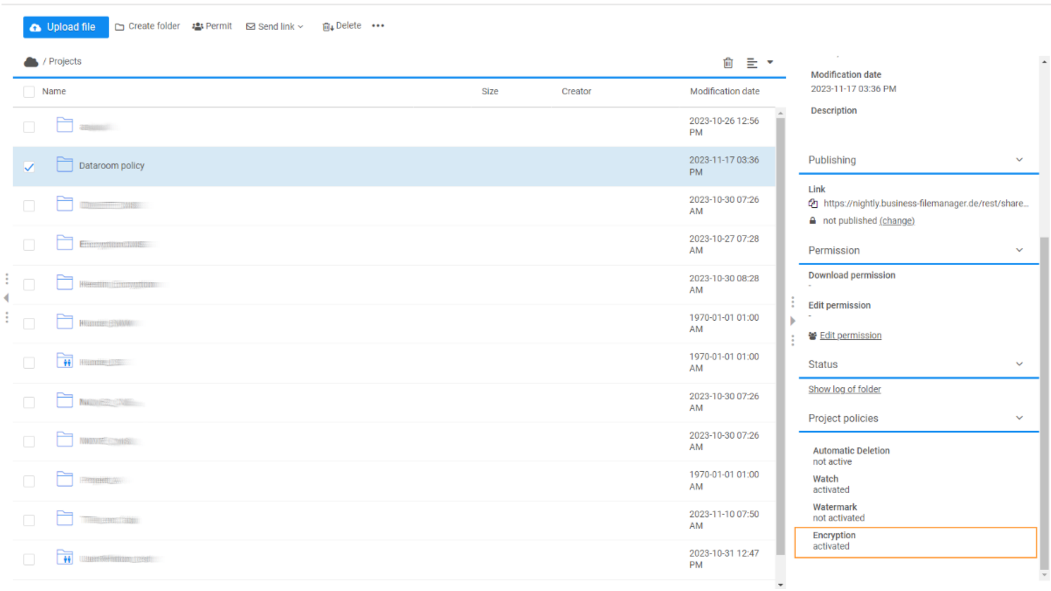


Figure 85: Check encryption policy

8.20 Data room policy – watermark

This policy adds an individually definable watermark to the PDF files of a data room.

Note: Only data room administrators can set up a policy per data room.
Now right-click on the desired folder and click on "Project guidelines".

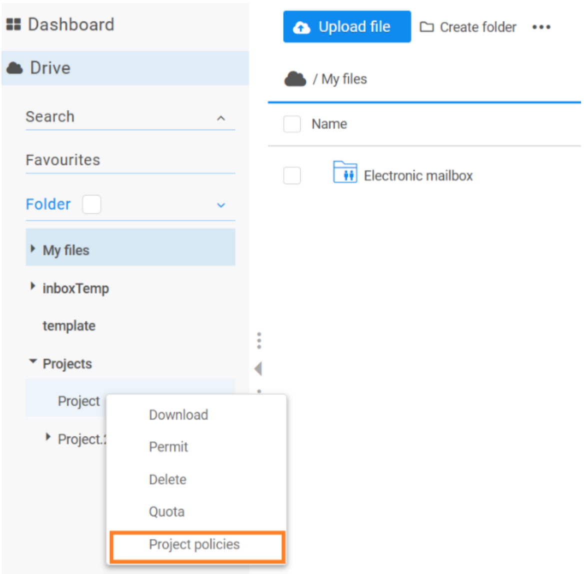


Figure 87: Project Policies

The "Watermark" policy can be selected, configured and activated via the dialog for managing data room policies. Here you can set which watermark (both in German an

English) should appear when downloading the PDF file.

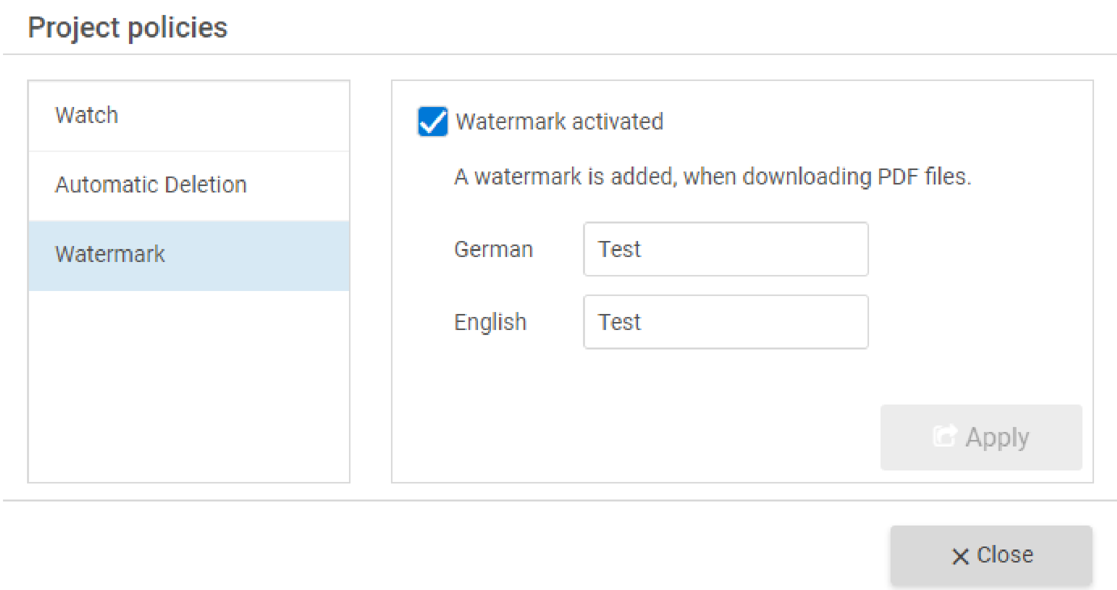


Figure 88: Set watermark

The user can see briefly whether a watermark guideline has been stored, and which settings have been made in the right-hand area under "Project guidelines".