



Outlook Add-In

Version 3.4.0

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User Guide



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This documentation describes the following Axway software:

Axway Outlook Add-in 3.4.0

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Preface

Who should read this document

This document is intended for users of Outlook. System administrators for SecureTransport may also find useful information in this document.

Related documentation

In addition to this document, the Axway Outlook Add-in documentation set includes:

- *Axway Outlook Add-in User Guide* - delivered as online help
- *Axway Outlook Add-in Release Notes*

Get more help

Go to Axway Support at support.axway.com to get technical support, download software, documentation, and knowledgebase articles. The website requires login credentials and is for customers with active support contracts.

Training

Axway offers training across the globe, including on-site instructor-led classes and self-paced online learning.

axway.com/support-services/training

Accessibility

Axway strives to create accessible documentation for users. The following describes the accessibility feature of the documentation.

Documentation accessibility

The product documentation provides the following accessibility features:

- *Keyboard-only navigation on page 6*
- *Screen reader support on page 6*
- *Support for high contrast and accessible use of colors on page 6*

Keyboard-only navigation

- The documentation source code contains ARIA (Accessible Rich Internet Applications) to improve the natural tab order and add focus where needed.
- ARIA landmarks are used to identify the main elements of the online help windows.

Screen reader support

- The documentation structure is clear and the source code of the online help can be interpreted by JAWS.
- Alternative text is provided for images whenever necessary.
- The PDF documents are tagged to provide a logical reading order.

Support for high contrast and accessible use of colors

- The documentation can be used in high-contrast mode.
- There is sufficient contrast between the text and the background color.
- The graphics have the right level of contrast and take into account the way color-blind people perceive colors.

Manage preferences

1

You can customize the behavior of the **Axway Outlook Add-in** to meet your individual needs, or the needs of your organization.

Open the Preferences dialog

Click the **Axway** button on the **Home** ribbon tab and select **Preferences** from the drop-down menu.

Edit preferences

1. Select the **General** or **Advanced** tab.
2. Modify the values you want to change.
3. Click **Apply** or **OK**.

Click **Restore Defaults** to reset the values to the defaults set at installation time.

General settings

Upload

Server URL – The URL of the Axway server that manages attachments. The initial value of the Server URL set at the time the **Axway Outlook Add-in** is installed.

Change the Server URL

1. Click **Change**. The Axway Add-in Preferences dialog box is displayed showing a field with the current Server URL.
2. Edit or enter a new Server URL.
3. Click **OK**.

Download

Download attachments to – The location on the file system where all attachments are downloaded. If you change this location and there are pending downloads, once you save the preferences, all pending downloads are restarted and the files are placed in the new location.

Download Attachments Automatically – The check box toggles the download method (automatic or manual).

Advanced settings

Authentication

Use Basic Authentication: Use email and password for basic authentication against the Axway server configured for upload on the **General** tab of the **Preferences** dialog.

- **Remember my email and password** - If this check box is selected, the user's email address and password are remembered for the user specified on the **General** tab. If the check box is not selected, the email address and password are removed. Be aware that the email and password are associated with the value of the **Server URL** field on the **General** tab. By default, this check box is not selected.
- **Email address** and **Password** - Must be a valid email address and password. When you are done, click **Test** to verify the settings.

Use Single Sign On: Use Kerberos Single Sign-on (SSO) authentication against the SecureTransport Server without the need to input credentials.

- **Use Server URL to compose SPN** - If this option is selected, the SecureTransport server URL is used to compose the service principal name (SPN) for SSO authentication. To test the composed SPN, click **Test**.
- **Use Custom SPN** - Enter a custom SPN in the field. A SPN must consist of a service class and host. The custom SPN must be valid. To test the validity of the custom SPN, click **Test**.

You can customize the behavior of the **Axway Outlook Add-in** to meet your individual needs, or the needs of your organization.

Troubleshooting

Enable Logging: If this checkbox is selected, all Outlook Add-in changes and actions will be logged in the `Axway/Outlook Add-in/Logs` directory. To access the `/Logs` directory and the log files, click **Open Log File Directory**. The log files can be opened and reviewed with a standard text editor to troubleshoot and resolve Axway Outlook Add-in issues.

You can manage *Show Message Info* and *Show Expired Transfers* actions in the side panel *Sent* and *Received* tabs. The default setting for both actions is selected. You can also execute a *Delete All* side panel entries action in both *Sent* and *Received* tabs. The *Received* tab also includes the *Start All* and *Pause All* download actions.

Show message information

The default setting for the *Show Message Info* action is selected. To deselect *Show Message Info*:

1. Click the *Select Action* drop-down menu.
2. Deselect *Show Message Info*. Message information is *not* displayed in the side panel entries.

To enable the display of message information:

1. Click the *Select Action* drop-down menu.
2. Select *Show Message Info*. Message information is now displayed in the side panel entries.

Show expired transfers

The default setting for the *Show Expired Transfers* action is selected. If a transfer has an expiration date, the expiration date is shown in the message information of sent and received transfers. Expiration warning messages are displayed beginning three days prior to the transfer expiring.

Expired transfers are shown as grayed out in the side panel.

To deselect *Show Expired Transfers*:

1. Click the *Select Action* drop-down menu.
2. Deselect *Show Expired Transfers*.

Expired transfers will not be displayed.

To enable the display of expired transfers:

1. Click the *Select Action* drop-down menu.
2. Select *Show Expired Transfers*.

Expired transfers will be displayed.

Delete all side panel entries

To delete all side panel entries on the current page in the selected tab:

1. Click the *Select Action* drop-down menu.
2. Select *Delete All*.
3. When prompted, confirm the deletion of the side panel entries on the current page.

Start all downloads

The *Start All* downloads action is only available on the *Received* tab and only affects the entries on the selected page. To start the download of all side panel entry attachments on the selected page:

1. Click the *Select Action* drop-down menu.
2. Select *Start All*.

The download of the side panel entry attachments on the current page is started.

Pause all downloads

The *Pause All* downloads action is only available on the *Received* tab and only affects the currently downloading items on the selected page. To pause the attachment downloads on the selected page:

1. Click the *Select Action* drop-down menu.
2. Select *Pause All*.

The download of the side panel entry attachments on the current page is paused.

Send files using the Axway Outlook Add-in

3

Using the Axway Outlook Add-in, you can transfer files of any size without overloading your email server. The minimum and maximum attachment file size is configured on the SecureTransport server. Whether the attached files fall into these boundaries or not, is calculated based on the cumulative size of all attached files. Files can be uploaded from the local file system, from network drives, and from external storage devices.

1. Start Outlook.
2. Compose an email.
3. Attach files using either method:

Outlook's built-in attachment mechanism - When you attach files using Outlook's attachment mechanism you are not able to attach files which are above the Outlook Exchange Server maximum file size limit. If you attempt to attach a file above the configured maximum limit using Outlook's built-in attachment mechanism, you will receive the following Outlook error message:

The Attachment size exceeds the allowable limit.

If you receive the error message, you can use **Attach Large File** to attach the file.

If the total size of all attachments is smaller than the minimum size configured on the Axway server, they are sent as a normal attachments. If the total size of all attachments is larger than the maximum size configured on the Axway server, an error message is displayed and the files that exceed the limit are not attached. For example, if you have already attached files totaling 150 MB in size and the server limit is 170 MB and you attempt to add 5 more files of 10 MB each, only the first two files will be attached. An error message will be displayed and the other 3 files will not be attached.

Attach Large File - Compose a message and click **Attach Large File** on the ribbon of the Message or Insert tab. Select files to attach in the normal way. If the total size of all attachments is larger than the maximum size configured on the Axway server, an error message is displayed and the files that exceed the limit are not attached. For example, if you have already attached files totaling 150 MB in size and the server limit is 170 MB and you attempt to add 5 more files of 10 MB each, only the first two files will be attached. An error message will be displayed and the other 3 files will not be attached.

The minimum size configured on the Axway server is not applicable when you use the **Attach Large File** button.

4. Choose a expiration date. For additional information, refer to [Send files with an expiration date on page 12](#)
5. Click **Send**.

At this point, the Axway Add-in intercepts your message and starts uploading the attachments on the Axway server.

Once the message has been intercepted, you can open the Axway Outlook Add-in side panel to monitor the current progress, pause, resume, or cancel a transfer. Any errors that occur during upload are also displayed in the side panel.

6. When the upload of the attachments is complete:

The email message appears in the Outbox folder and is delivered by Outlook.

Note Any outgoing message rules that you set up in Outlook are not applied to messages sent using Axway Outlook Add-in.

Send files with an expiration date

Axway Outlook Add-in allows you to specify expiration times for outgoing files. This can limit access to sensitive files for a set period of time. The expiration date can be set as follows:

- 1 Day
- 7 Days
- 30 Days
- 60 Days
- Never

When the expiration date is selected, the *Info Bar* text is updated to clearly state the expiration date.

Download files using the Axway Outlook Add-in

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Every incoming message is evaluated to determine if there are attachments that must be handled by the **Axway Outlook Add-in**. Attachments are downloaded either automatically or manually based on the setting in the **Preferences** dialog.

You may be prompted to authenticate before receiving downloads.

Automatic download

The automatic download is triggered only if the host name represented in the download link (URL) from which the attachments are downloaded is the same as the host specified in the **Server URL** field in the **Preferences** dialog.

After the attachments are successfully downloaded, they are displayed in the **Received** tab of the **Axway Add-in Side Panel**. Click the file name to directly open the file, or use right click to:

- Open the file
- Open containing folder
- Copy download link

By default, attachments are saved to the folder `My Axway Add-in Downloads` under `My Documents`. You can change this location in the **Preferences** dialog.

Manual download

When you use manual download, you open the **Received** tab of the **Axway Add-in Side Panel** to display the attachments, and then click **Control** to download each attachment individually.

To pause or stop a download in progress, click **Pause** or **Stop**.

- Any data already downloaded when you stop a download is deleted.
- You can resume a paused or restart a stopped download. When you resume a paused download, the file begins downloading again from the point at which you paused it. When you restart a stopped download, download restarts from the beginning.

After the attachment is downloaded, you can directly click the file name in the **Axway Add-in Side Panel** to open the file, or use right click to:

- Open the file
- Open containing folder

- Copy download link

1. If the **AxwayOutlook Add-in Side Panel** is not currently displayed, click the **Axway** button on the home ribbon tab and select **Show My Transfers**.
2. Open the **Sent** tab.
3. Click **View Download History** for the message whose history you want to view.

You may be prompted to authenticate.

The **Download History** window is displayed and contains the following information:

- Subject of the message and time sent
- File name and size of the attachment
- Date and time the file was downloaded
- Name and email address of the recipient who downloaded the file. If the Axway server cannot identify the recipient, the value "anonymous" is displayed.

Note In some cases, depending on the server configuration, the download history may not be received for expired transfers.

Navigate side panel pages

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All sent and received items can be accessed in the side panel. The side panel automatically paginates when the maximum number of items per page is exceeded. The default maximum number of items per page is 20. The side panel is also split between sent and received items:

- To view the sent items, click the *Sent* tab.
- To view the received items, click the *Received* tab.

The tab headers contain information about the currently visible items and provide page details when more than one page is available. When more than one page is available, the number of items from the total number of items is displayed. For example, if there are 65 items available and the maximum number of items per page is 20, the first page header will display 1 - 20 from 65, the second page header will display 21 - 40 from 65, and so forth for each additional page with the last page displayed 61 - 65 from 65.

You can navigate between the pages using the *Previous* and *Next* navigation arrows or you can enter the desired page number in the *Page* field and press **Enter** to navigate to the desired page. The current page number and the total number of pages is displayed in the tab header. For example, if the total number of pages available is four, the page number for the first page will be 1 / 4, for the second page it will be 2 / 4, and so forth.

Related topic

[Search side panel entries on page 17](#)

Search side panel entries

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There are three ways to search the side panel entries:

- [Basic searches](#)
- [Date and attachment searches](#)
- [Enhanced searches](#)

Each of these search methodologies are described in the following sections.

Basic searches

Basic searches are executed on the From, To, and Subject fields of the side panel entries. For example, if you enter a name in the *Search transfers* field and click **Enter** or **Search**, all items with entered name as sender (From) or receiver (To) will be displayed in the side panel. Also, any side panel items with the name as part of the subject will be displayed. Additionally, if you enter text in the *Search transfers* field and click **Enter** or **Search**, all side panel items with the entered text as part of the subject will be displayed.

Basic search examples:

- By From or To - John Doe
 - Only the items sent from or to John Doe are displayed unless the name John Doe is also part of message subject
- By Subject - Accounts Receivable Summary
 - Only the items with Accounts Receivable Summary as part of the subject will be displayed

Date and attachment searches

Date and attachment searches are performed using keywords. Date searches are performed using the keywords sent:*date* and received:*date*. The following date formats can be used:

- xx/xx/xxxx - Date entered in the local date format (Same format as in the side panel)
- xx/xxxx - Month/Year
- xxxx - Year

Attachment searches are performed using the keyword attachments. For example:

- attachments:*attachmentName*

Date search examples:

- By year - "**sent:2015**", "**received:2015**"
 - Only the side panel entries sent or received in the specified year are displayed.
- By month and year - "**sent:01/2015**", "**received:01/2015**"
 - Only the side panel entries sent or received in the specified month and year are displayed.
- By date - "**sent:03/27/2015**", "**received:03/27/2015**"
 - Only the side panel entries sent or received on the specified date are displayed.

Attachment search examples:

- By attachment name - "**attachments:doc**"
 - All side panel entries with attachments containing *doc* are displayed. For example, *.**doc**, **Document**
- By attachment name - "**attachments:pdf**"
 - All side panel entries with attachments containing pdf are displayed. For example, *Installation_Guide.pdf*, *User_Guide.pdf*

Enhanced searches

Enhanced searches are performed by combining basic searches and keyword searches with the AND operator. Enhanced searches are currently limited to **three keywords and two AND operators**. If more than three keywords and two AND operators are entered in the *Search Transfers* field, the search results will be limited to the first three keywords.

Example 1:

- Display side panel entries with *John* and *report* in the Sent To, From, and Subject fields.
 - "John **AND** report"

Example 2:

- Display side panel entries with *John* and *report* in the Sent To, From, and Subject fields and received in January 2015.
 - "John **AND** report **AND** received:01/2015"

Example 3:

Note This example shows the maximum number of keywords linked by AND operators that will be searched.

- Display side panel entries with *John* and *report* in the Sent To, From, and Subject fields and with attachment names that contain *annual*.
 - "John **AND** report **AND** attachments:annual"

Uninstall the Axway Outlook Add-in

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Note Depending on how the add-in was installed, you may need administrative privileges for your computer to uninstall it. Contact your administrator.

1. If Outlook is open, close it before you start uninstalling.
2. Open the Control Panel and select the option to uninstall a program.
3. Select Axway Outlook Add-in from the list.
4. Click the button to uninstall, and then confirm the removal.