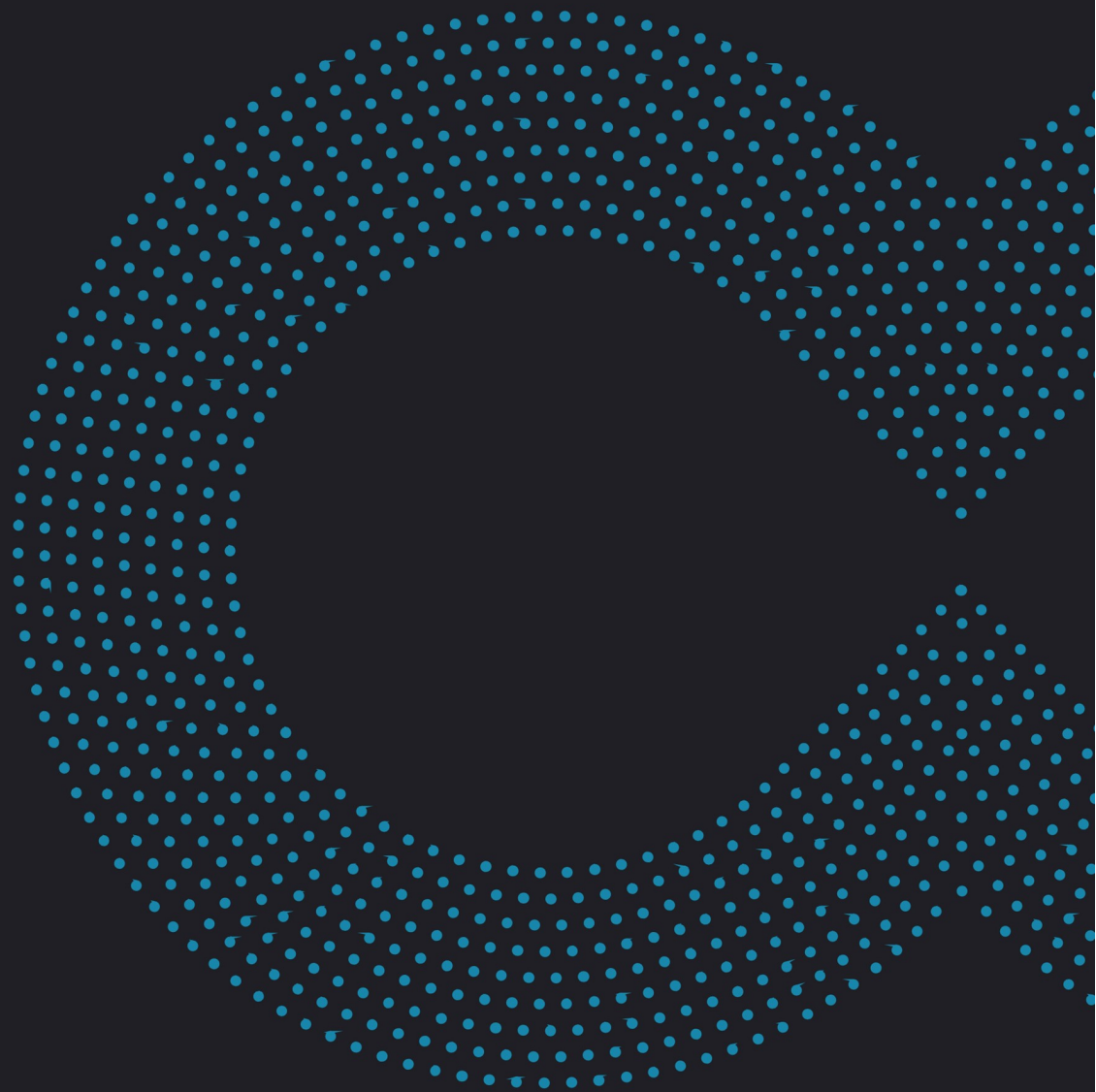


∞drive work

User Guide

Oodrive Work_share



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1. Getting started with Oodrive Work_share

Oodrive Work_share is an online collaboration tool that enables you to share your sensitive documents in a secure environment.

Oodrive Work_share lets you perform actions such as:

- Upload and manage your sensitive documents in your workspace
- Send documents securely
- Work as a team on a collaborative project
- Manage security options and access permissions for your colleagues
- Supervise your colleagues' activities on shared items

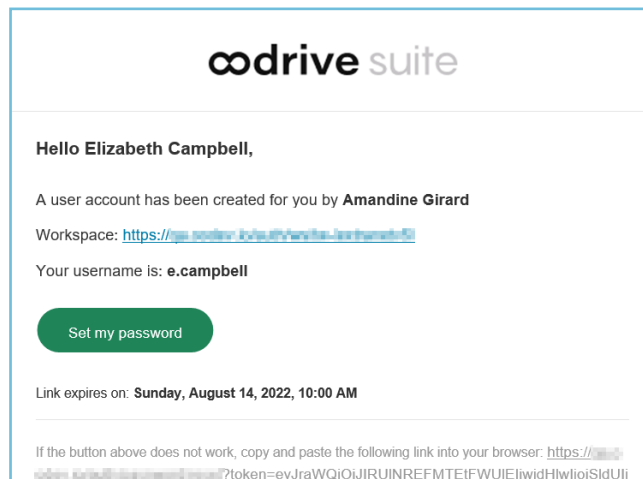
1.1. Log in to your workspace

Depending on the authentication method your organization has chosen, you can log in:

- using your Oodrive login credentials
- using your company login credentials

Log in with your Oodrive login credentials

1. Retrieve the username emailed to you when your account was created and click **Set my password**.



2. You will be redirected to a browser page asking you to set a password and confirm it before clicking **Validate**.

3. Click **Log in** to access the login page.

Please note: If the Oodrive login field is not displayed, click **Log in using your login credentials** to access it.

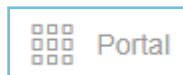
4. Enter your username and click **Next**.
5. Enter the password you have just specified, then click **Log in**.


Careful: After 5 failed login attempts, a security code will automatically be sent via email. This code will be required in addition to your password.

If you have forgotten your password, click **Forgot your password?**

If two-factor authentication has already been configured on your workspace, you will also be asked to enter the code received on your mobile device.

6. Next, you will access the Oodrive Suite portal, where you will find all the applications and configuration modules to which you have access.



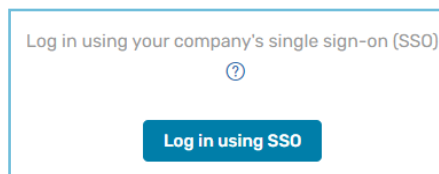
To return to the portal at any time, click on  in the upper-right corner of the page, then select **Portal**.

Please note: As a security measure, you will be automatically logged out of your session after 30 minutes of inactivity. You can extend your session by clicking **Continue to browse** when the logout warning appears on the screen.

Log out at any time by clicking on your name in the upper-right corner of the page, then on **Logout**.

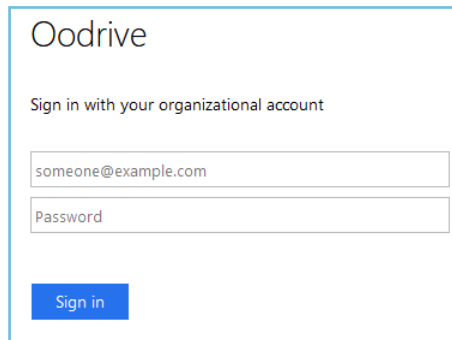
Log in with your company login credentials

1. Click the **Log in using SSO** button.



If the button is not available, click **Log in using your company's single sign-on (SSO)**

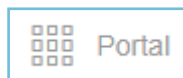
2. Enter your company login credentials and click **Log in**.




If you have forgotten the password associated with your company username, please contact your company's IT administrator.

If two-factor authentication has already been configured on your workspace, you will also be asked to enter the code received on your mobile device.

3. Next, you will access the Oodrive Suite portal where you will find all the applications and configuration modules to which you have access.



To return to the portal at any time, click on  in the upper-right corner of the page, then select **Portal**.

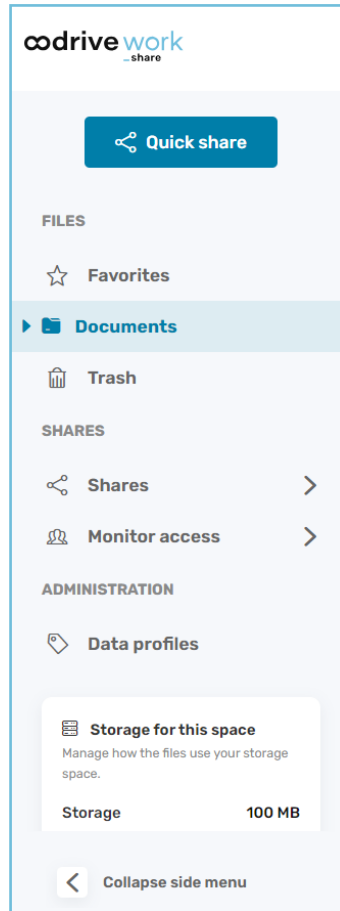
Please note: As a security measure, you will be automatically logged out of your session after 30 minutes of inactivity. You can extend your session by clicking **Continue to browse** when the logout warning appears on the screen.

Log out at any time by clicking on your name in the upper-right corner of the page, then on **Logout**.

1.2. Overview of the Oodrive Work_share web application

Oodrive Work_share allows you to collaborate on your sensitive documents in a secure environment. You can manage your documents online and share them with internal and external collaborators with a great degree of control over the security options and access permissions granted to each person.

In the navigation panel on the left side of the page, you can quickly access the sections of your Oodrive Work_share application.



The table below presents the various sections of the Oodrive Work_share application.

Section	Action
Quick share	Quickly share one or more documents with your internal or external collaborators via a link or an email.
Favorites	Find the folders and files you have added to your favorites (only in My space).
Documents	Browse and manage the folders and files available in your workspace.
Trash	Find the items you have deleted so that you can restore or permanently delete them.
Shares	Access sent and received shares to consult and/or manage them.
Monitor access	Manage access to your collaborative shares individually or in bulk (only in My space).
Data profiles	Create custom management data profiles to automate the labeling of your files and folders.
Storage	View how much storage space is available.

1.3. Browse your files and folders

Go to the **Documents** section of a space to view all the folders and files available in this space. In **My space**, this includes collaborative folders you have created or received.

To make it easier to browse and manage the documents in your workspace, you can also:


- perform a search to find a file
- choose how to display items in your file manager
- display details for an item

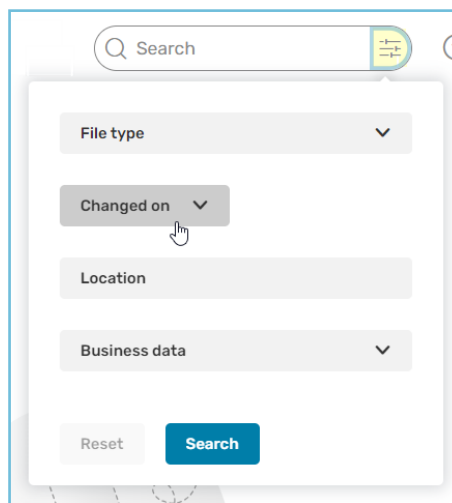
Search for a file

Quickly find your documents by searching for keyword or by criteria.

A keyword search is performed on the name and contents of files, whereas a filtered search lets you find files that match your chosen criteria.

Search by criteria

1. Click the  icon to the right of the search bar along the top of the application.
2. Use the available filters to define your search criteria. You can filter by:
 - file type (image, PDF, document, spreadsheet, etc.)
 - modification date
 - location of the document in the file manager
 - business data



3. When you have finished defining the search criteria, click **Search** to display the results.
4. Click on the title of the document matching your search to access it.

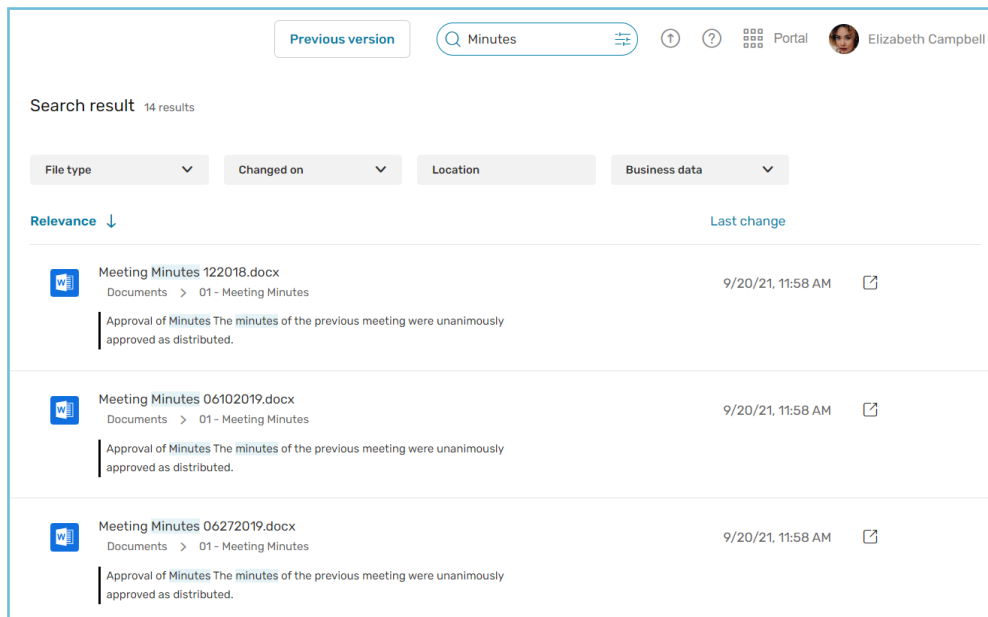


You can also access the folder where the document is located by hovering your mouse over it and clicking **Show in folder**.

Perform a keyword search

1. Click the search bar along the top of the application.
2. Enter key words or phrases that appear in your file, then press **Enter** on the keyboard.

The results of your keyword search are displayed.



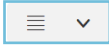
3. If you'd like, use the filters above the results to further refine your search.
4. Click on the title of the document matching your search to access it.



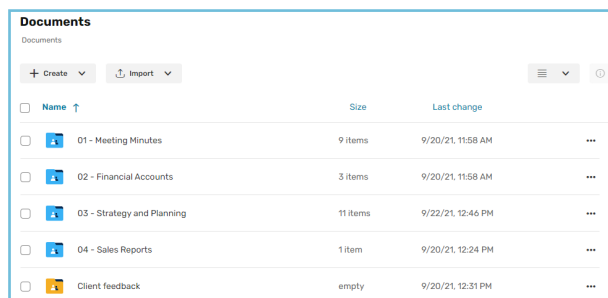
You can also access the folder where the document is located by hovering your mouse over it and clicking **Show in folder**.

Choose how your folders or files are displayed

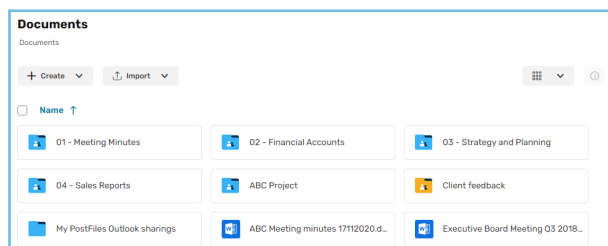
You can change the presentation of your folders and files in the **Documents** section according to your viewing preferences.

To do so, click the  icon then select your preferred display mode: **List**, **Grid** or **Large-format grid**.

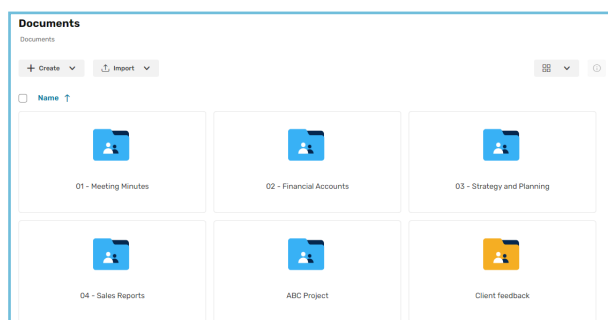
"List" view



"Grid" view




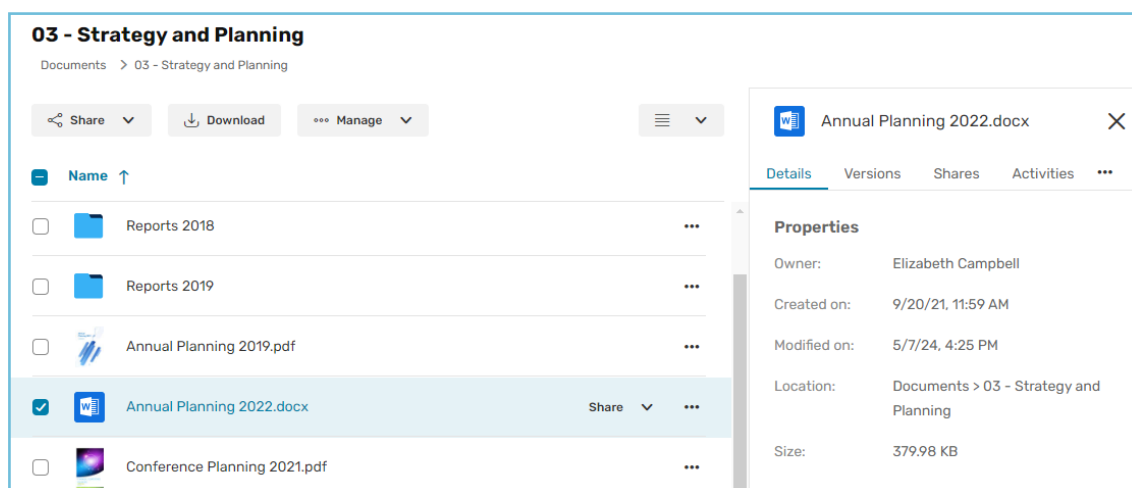
"Large-format grid" view



Display details for an item

To view the details for a file or folder:

1. In the navigation panel, click the **Documents** or **Favorites** section.
2. Select the file or folder for which you want to see the details.
3. Click  in the upper-right corner of your files list to open the information panel.



4. Browse through the panel tabs to access the information you want to view.
 - **Details:** the properties (owner, creation and modification date, size, location, etc.) and management data for the item
 - **Shares:** the list of shares to which the item belongs
 - **Activities:** the history of actions performed on the item
 - **Versions:** the history of the versions created for a document
 - **Memos:** the memos attached to the item

1.4. Install the EasyTransfer desktop application

EasyTransfer is the desktop application for managing transfers to and from Oodrive Work share. It takes over from the browser and allows users to import or download sensitive data with no size limit.

EasyTransfer also allows you to edit the documents locally in your Oodrive Work share workspace on your computer with the Microsoft Office application.

1. Go to your collaborative application.
2. Click your profile in the upper-right corner of the screen and select **Applications**.
3. Go to the **EasyTransfer** section, then download the application for Windows or Mac.
4. Go to your Downloads folder and double-click the **EasyTransfer-xxx.exe** installer.
5. Follow the steps in the installation wizard.

Link EasyTransfer to your Oodrive Work_share workspace

The EasyTransfer application must be linked to your browser and your workspace. After installation, a pairing procedure appears when you log in to your online space.

1. Go to your collaborative application.
2. Two windows are displayed, prompting you to link your browser with EasyTransfer:
 - the first, generated by your online workspace, contains an automatic pairing code
 - the second, generated by EasyTransfer, asks you to enter this code to finalize the pairing process
3. Copy and paste the pairing code into the EasyTransfer window, then click **OK**.

A confirmation message indicates that the application is linked to the platform, and the EasyTransfer application icon appears in your computer's task bar.

2. Manage your sensitive documents

2.1. Populate your workspace

You can populate your workspace by:

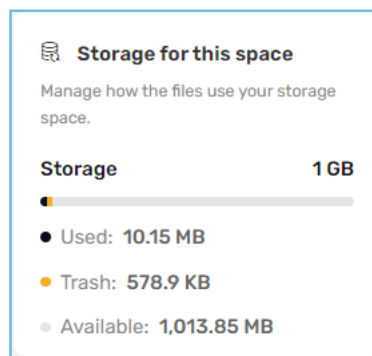
- uploading folders and files from your computer
- creating new files and folders directly in your workspace

Please note: In order to upload items into your workspace or create new ones, you must have enough storage space.

View available storage

You can view how much storage space you have available at the bottom of the navigation panel. You can see:

- your total storage space
- the storage space still remaining
- the storage space used
- the storage space used by items in the Trash



If you have reached your maximum storage capacity, contact your administrator to request more storage. You can also empty the Trash to free up space.

Upload folders and files

1. In the navigation panel, click on the **Documents** section.
2. If you want to add files to a specific folder, browse your folders and open the folder of your choice.
3. Click **Import**, then select **Import files**.

4. Browse the file explorer on your computer and select one or several files by holding down the **Ctrl** key.
5. Click **Open**.

If you prefer, you can also drag and drop files from your computer's file explorer to the **Documents** section.

Tip: To import a local folder to your Oodrive Work_share workspace, download the EasyTransfer plugin from the **Applications** menu, which you can access by clicking on your profile.

Create new folders and files

Create a new folder

1. Go to the space of your choice.
2. In the navigation panel, click the **Documents** section.
3. If you want to create your folder at a specific location in your file manager, browse your workspace and go to the parent folder of your choice.
4. Click **Create** and select **Create a folder**.
5. In the window that appears, enter the name of your folder, then click **Create**.

Your new folder is now available in your workspace.

Create a new file

1. Go to the space of your choice.
2. In the navigation panel, click the **Documents** section.
3. If you want to create your file at a specific location in your file manager, browse your workspace and go to the parent folder of your choice.
4. Click **Create** and select **Create a file**.
5. Select the type of file you want to create: **Word**, **Excel**, or **PowerPoint**
6. In the window that appears, enter the name of your file, then click **Create**.

Your new file is now available in your workspace. You can edit it directly online to add content to it.

2.2. Manage and organize your files and folders

You can access your files at any time to consult, edit or reorganize them.

To do this, select an item, click **Manage** along the top of the page, then select the action to perform:

Action	Result
Consult	Display a document in the viewer to consult it. When you're done, click the cross to close the viewer.
Move	<p>Move a file or folder in your file manager.</p> <p>To do this, select its new location in your file manager, then click Move. If you wish, you can also create a new folder in your file manager to contain the moved item.</p>
Copy	<p>Create a copy of a folder or file.</p> <p>Please note: You cannot copy a folder to its original location or to one of its child folders.</p>
Rename	Rename a file or folder.
Lock	<p>Lock a file to protect it from changes.</p> <p>Locking files is useful in collaborative shares if you need to temporarily prevent your colleagues from making changes. The file will remain locked until you unlock it.</p>
Add to favorites	<p>Add a folder or file to your favorites for quick access. Your favorites are marked with a star.</p> <p>You can remove an item from your favorites at any time by selecting it and clicking Manage > Remove from favorites.</p>

2.3. Edit documents

You can edit your files (documents, spreadsheets, slideshows) directly from your Oodrive Work... share application.

You can choose to edit a file on your computer via EasyTransfer, or to modify it in your browser with Office Online or Collabora Online.

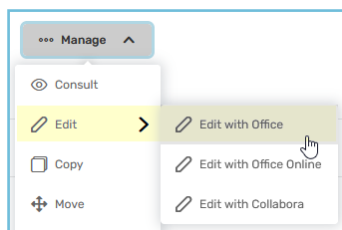
Edit a document with Microsoft Office

To edit a file from your computer with the Microsoft Office application, you need to ensure you have Easy Transfer, and that it is linked with your browser.

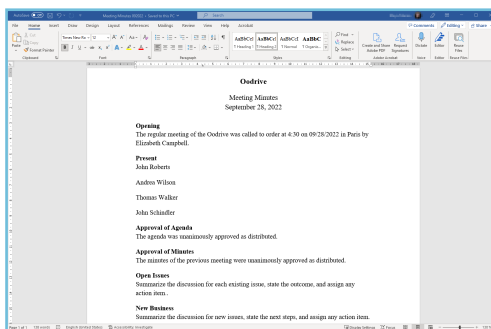
1. In the navigation panel, click the **Documents** section.
2. Browse your file manager and select the file you want to edit.

Please note: You can edit your own files as well as shared files for which you have editing rights.

3. Click **Manage** and select **Edit**, then **Edit with Office**.



The document opens in Office on your computer.



4. Make changes as desired.
5. When you have finished, click **Save** and close the file.

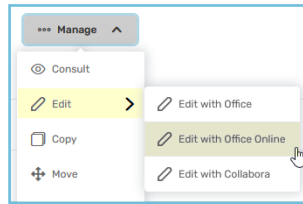
Edit a document with Office Online

Before you can edit a file with Office Online, you need to have an Office 365 account.

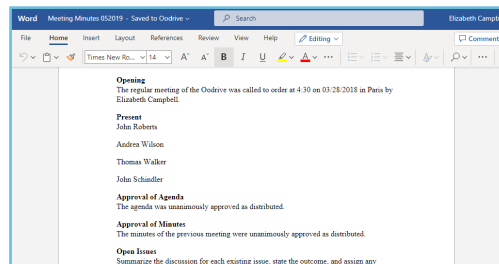
1. In the navigation panel, click on the **Documents** section.
2. Browse your files and select the file you'd like to edit.

Please note: You can edit your own files as well as shared files for which you have editing rights.

3. Click **Manage** and select **Edit**, then **Edit with Office Online**.



The document opens in a new tab.



4. Log in to your Office 365 account.

5. Make changes as desired.

Your changes are saved automatically, as you make them.

6. Once you finish, close the tab.

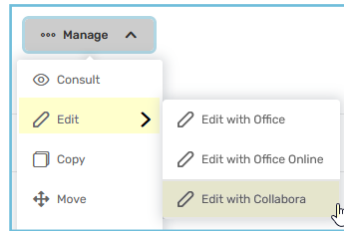
Edit a file with Collabora Online

Collabora Online is a solution that allows you to edit your sensitive documents online in a secure, sovereign environment.

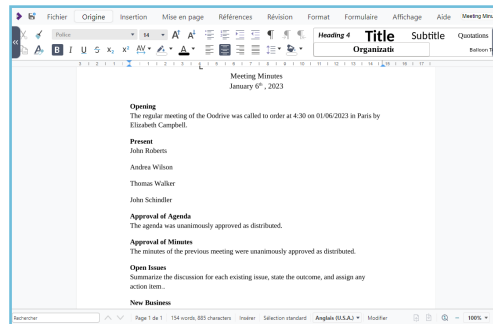
1. In the navigation panel, click the **Documents** section.
2. Browse your file manager and select the file you want to edit.

Please note: You can edit your own files as well as shared files for which you have editing rights.

3. Click **Manage** and select **Edit**, then **Edit with Collabora**.



The document opens in a new tab.




4. Make changes as desired.
5. When you have finished, click **Save** and close the file.

Manage versions of a document

When you and your colleagues collaborate on files in your workspace by editing them in Office, Office Online or Collabora Online, Oodrive Work_share keeps track of the document history by versioning it.

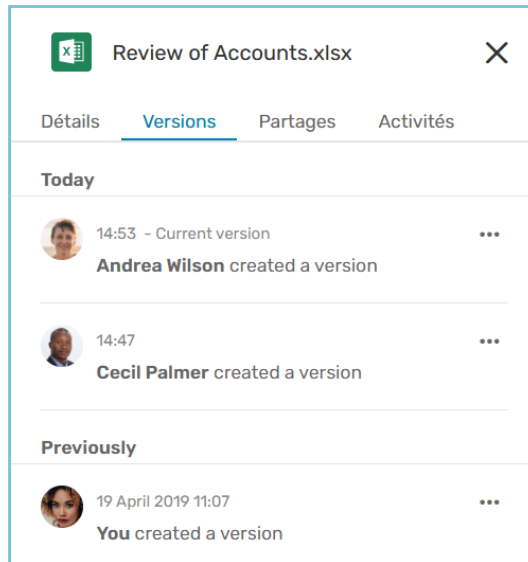
In the event of an error or unwanted changes, you can therefore recover an earlier version of your document.

To manage versions of a document:

1. In the navigation panel, click the **Documents** section.
2. Select the file for which you want to view the versions.
3. Click  in the upper-right corner of the files list to open the information panel.

4. Go to the **Versions** tab in the information panel.

You will see the history of the versions generated for your file, with the date and person responsible for the changes.




5. Click the three small dots to the right of a version to consult, download or delete it.

Please note: Only the owner of the document can delete a version. If you are a recipient of the document via collaborative sharing, you can only consult and download previous versions.

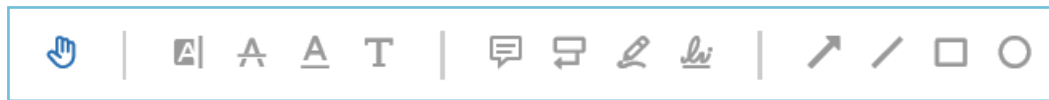
2.4. Annotate a document

By default, your annotations are visible only to you, and do not change the document itself. However, you can choose to make your annotations public so that you can share them with all collaborators who have access to the document in question.

This feature is particularly useful if you want to collaborate on a document for which you do not have editing permissions.

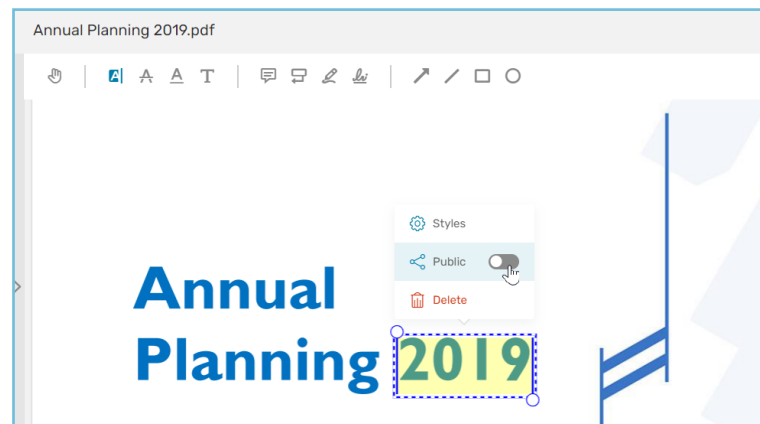
1. In the navigation panel, click the **Documents** section.
2. Select the file you want to annotate.
3. Click **Manage**, then **Consult** to open the document viewer.
4. Click the  annotation icon in the upper-right corner of the viewer.

5. Use the toolbar above the document to annotate it.



Once added, annotations are saved automatically.

6. If you want to share an annotation with your collaborators, select it and enable the **Public** option.



Once you have made it public, the annotation becomes visible to all collaborators with access to the document; however, only you can edit or delete it.

7. When you are finished, click **Finish** to close editing mode. Next, click the cross in the upper-left corner of the application to exit the document.

You can go back to the document viewer at any time to move, edit or delete an annotation, or to make it private/public.

2.5. Write a memo

If this option is enabled for your workspace, you will be able to create memos for an item that belongs to you or has been made available to you via sharing.

Memos are particularly useful for:

- Adding personal notes to your own folders and documents
- Collaborating on a remote project without marking documents with annotations
- Collaborating on a document for which you do not have editing permissions
- Taking part in a digital approval process

Please note: The owner of each file is able to delete memos added by their collaborators.

1. In the navigation panel, click the **Documents** section.
2. Browse your file manager and select the file or folder to which you want to add a memo.
3. Click **Manage** and select **Create a memo**.
4. Fill in the title of your memo, then its content.

If you wish, you can tag a collaborator to draw their attention to your memo. To do so, click **Tag a user** and select a collaborator.

5. Once you have finished, click **Submit**.

If you have tagged a collaborator in your memo, they will receive an email notification to let them know.

2.6. Add metadata to your files

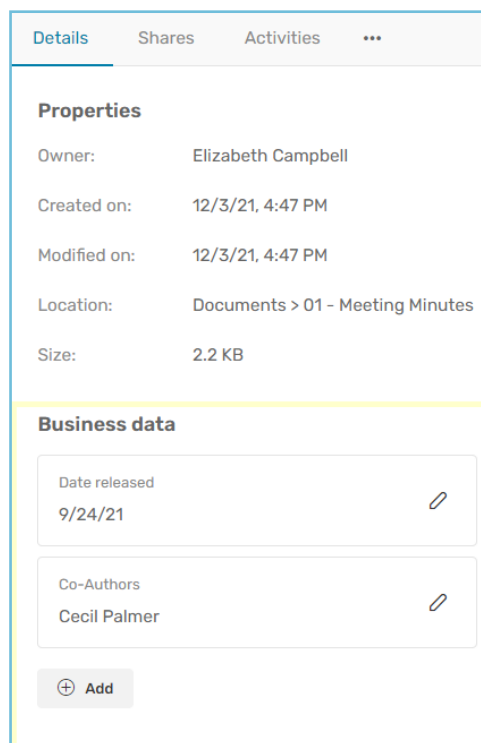
Some metadata for a file, such as owner, location, size, and creation date, is generated automatically by Oodrive Work_share, and appears in the information panel of the file.

However, your administrator may also provide a list of additional metadata, known as **business data**, that you may add to the files of your choice and fill in as needed, in order to:

- Classify files to improve filtering and find them more easily when making searches
- Provide more context on the content of a document (subject, description, status, level of confidentiality...)

In addition, you have the option of creating **business data profiles**, which allow you to group the metadata fields you use most often, so they are displayed by default for all files in a folder.

You can view the business data added to a file in the information panel:



You can manage the business data of any file that belongs to you or that has been made available to you via a collaborative share, independently of the permissions assigned to you.

Manage your business data profiles

A business data profile is a set of metadata fields that are frequently used together and are intended to be displayed by default for the files in a folder.

You can create and manage your custom business data profiles in the **Data profiles** section of the collaboration module.

By using a business data profile, you can:


- clearly show your colleagues which metadata must be filled in for a file,
- enter the relevant metadata, without having to add each field manually.

Step 1: Create a business data profile

1. Log in to your workspace and access your collaborative application.
2. In the navigation panel on the left, select the **Data profiles** section.
3. Click **Create profile**, then enter the **Profile name**.
4. Click **Add data item** and select a metadata field from the drop-down list.

The available options are fields configured in advance by the administrator of your solution.

5. Repeat the previous step to add as many metadata items as necessary to your data profile.

To remove a data item added in error, click the delete icon  to the right of the item.

6. To set the display order of the fields, click the six small dots to the left of a metadata item, then drag and drop the item to move it.

7. When you have finished, click **Submit** to save your data profile.

You can go back to the **Data profiles** section to modify or delete a business data profile at any time. To do so, click the profile of your choice, then click **Edit** or **Delete** in the panel on the right-hand side of the screen.

Step 2: Apply a data profile to a folder


You can apply only one data profile to each folder. Similarly, only one data profile is displayed for each file.

If you have a folder structure in which each folder is associated with a different data profile, the profile of the direct parent will apply to the files.

1. In the navigation panel on the left, select the **Documents** or **Favorites** section.
2. Browse your folders and identify the folder to which you want to apply a business data profile.
3. Right-click the folder and select **Business data**.

4. In the **Details** tab, go to the **Business data profile** section and click **Apply a profile to the folder**.
5. Use the drop-down list to select a business data profile from the ones you have created, then click **Submit**.

If you want to modify the profile associated with a folder, you must first delete the current profile, then apply the new one.

To delete a profile, go to the folder information panel and select the **Details** tab. Next, click the delete icon  to the right of the profile. Data already added for this profile will be kept as independent metadata items.

Use business data

Add business data to a file

Add business data

1. From the **Documents** or **Favorites** section, browse your workspace and select the file to which you want to add business data.
2. Right-click the file and select **Business data**.
3. In the **Details** tab of the information panel, go into the **Business data** section and click **Add**.
4. From the **Select data** drop-down list, choose the data type you want to fill in, then click **Submit**.

The available options are fields configured in advance by the administrator of your solution.

Note: Each field may have a unique value. If you select an existing business data item, the previous value will be replaced by the one you are entering.

5. Enter the value of your choice for the selected business data item.
6. Click **Save**.

Enter data related to a profile

When a business data profile is applied to a folder, the fields defined for this profile are displayed automatically for each file in the folder. All you need to do is fill them in.


1. From the **Documents** or **Favorites** section, browse your files and folders and identify the file to which you want to add business data.
2. Right-click the file and select **Business data**.
3. In the **Details** tab, go into the **Business data** section and click on the pencil icon to the right of the profile.
4. Enter the value of your choice for each data item in the profile.

Please note: Once you have entered a value for a field from a data profile, it can be modified, but not deleted.

5. Click **Save**.

Modify or delete data

You can modify or delete business data from a file at any time by going to the information panel of the file.

1. From the **Documents** or **Favorites** section, browse your workspace and select the file for which you want to modify business data.
2. Click  to go to the information panel.
3. In the **Details** tab, go into the **Business data** section.
4. Click the pencil icon to the right of the data item or profile you want to modify.
5. Perform one of the following actions:
 - **To modify data:** make your changes, then click **Save**.
 - **To delete data:** click **Delete**.

Please note: You cannot delete data belonging to a business data profile.

Your modifications take effect immediately.

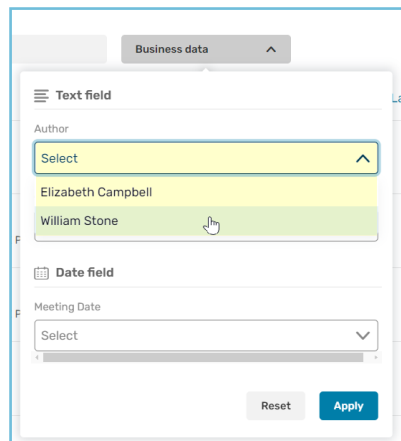
Filter searches by business data

You can use business data as a filter to refine a search made on workspace files.

1. Use the search bar along the top of the page to search for a keyword on your workspace.
2. From the search results page, click **Business data**.

A menu displays the metadata fields available for the search documents.

3. Use the drop-down list associated with a field to select the value of your choice.



4. Fill in as many fields as you want to refine your search.
5. Once you have finished, click **Apply**.

The results are filtered and only files with the selected metadata are displayed.

2.7. Delete files and folders

The files and folders you delete from your file explorer are automatically moved to your Trash. Without any action on your part, they will be kept in the Trash for a period defined by your administrator (between 1 day and 3 years), and will be permanently deleted at the end of this period.

You can choose at any time to take action on the items in the Trash, such as restoring them or permanently deleting them.

Delete a file or folder

1. In the navigation panel, click the **Documents** section, then select the file or folder you want to delete
2. Click the **Manage** button in the bar along the top of the page and select **Delete**.
3. In the window that appears, click **Delete** to confirm the deletion of the item.

Your file or folder is now in your Trash.

Manage the Trash

Go to the Trash to restore or permanently delete an item.

To quickly find the item you are looking for, you can click the column headings to sort the contents of the Trash by the following attributes:

- Name
- Size
- Deletion date
- Person who deleted the item

Restore an item from the Trash

1. In the navigation panel, click the **Trash** section, then select the item(s) you want to restore.
2. Click **Restore** to restore the selected item(s).

You can now find the restored items in their last location before they were deleted.

Tip: You can click **Restore all** to restore all items in your Trash.

Permanently delete files from the Trash

1. In the navigation panel, click the **Trash** section, then select the item(s) you want to permanently delete.
2. Click **Permanently delete** to permanently delete the selected item(s).

The selected item(s) are now permanently deleted.

Tip: You can click **Empty trash** to permanently delete all items in your Trash.

3. Have a PDF document signed

The Oodrive Work_share application allows you to have documents electronically signed by internal and external collaborators.

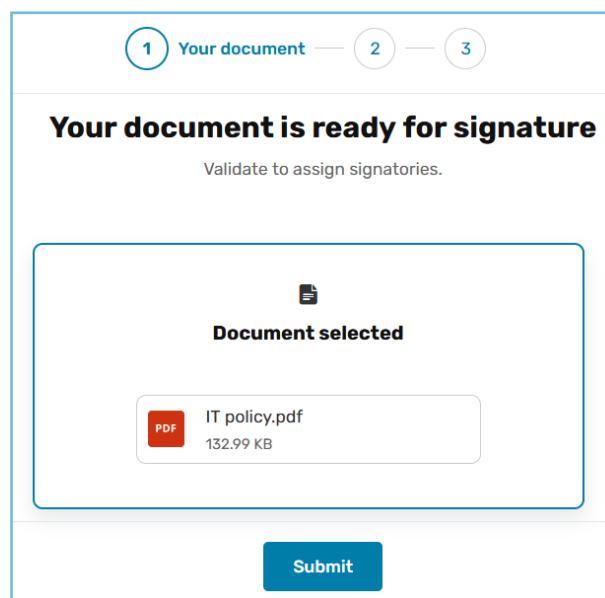
This will enable you to set up a document validation workflow, speed up internal authorization processes or have agreements signed with external parties.

3.1. Send a PDF document for signature

Step 1 : Select the document to be signed

1. Go to one of your teamspaces or **My space**.
2. Browse through your folders and select the PDF document(s) requiring signature.
3. Click **Manage** and select **Get signature**.

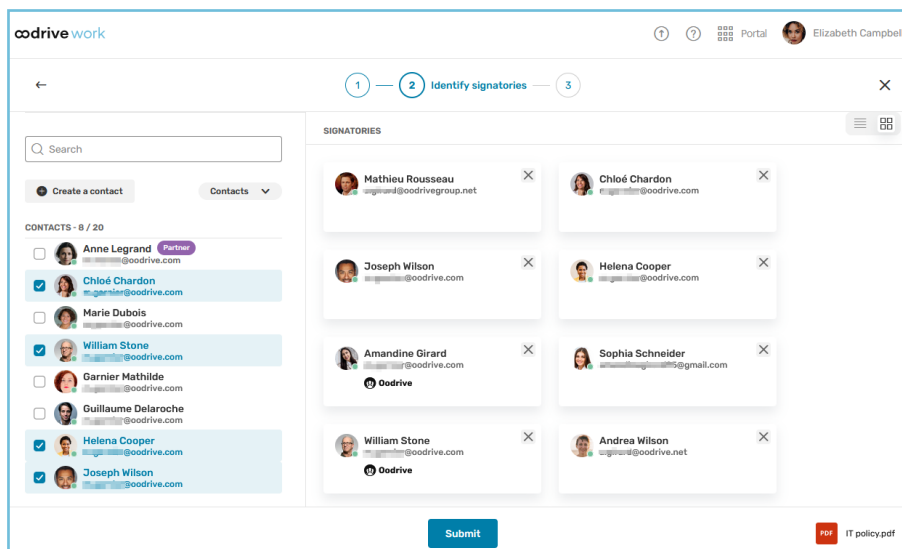
You start the process of requesting a signature.



4. If you have selected several documents for signature, you will be asked if you wish to merge them. Choose an option.
 - **Keep documents separate:** each document is signed independently of the others.
 - **Merge documents:** the documents you have selected are merged into a single document requiring a single signature.
5. Click **Submit** to go to the next step and add signatories.

Step 2: Add signatories

1. In the panel on the left, select the signatories from your address book.

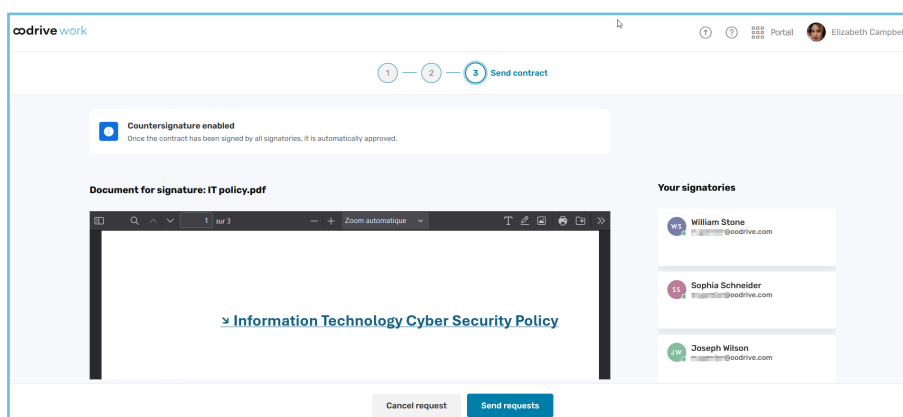


Tip: You can create a contact on the fly using the **Create a contact** button. Enter your contact's surname, first name and e-mail address and click **Create**. The contact in question will be added to your address book and automatically selected as the document's signatory.




2. When you have finished, click **Submit** to go to the next step.

Step 3: Send the document for signature

Check the summary of your signature request, then click **Send requests**.



A copy of the original document is created for the signature process:

<input type="checkbox"/>	 IT policy - Contract - 2024-04-15 - 16-06-02.pdf	 In progress	4/15/24, 4:13 PM	...
<input type="checkbox"/>	 IT policy.pdf		4/15/24, 4:04 PM	...





You can view the progress of the signing process and follow-up with signatories from the information panel, under the **Signature** tab.

3.2. Manage signature requests

You can monitor the progress of your signature requests, cancel them, or follow-up with signatories.


Monitor the signature process

Once your document has been sent to the signatories, a label appears on your document to indicate the status of the signature:

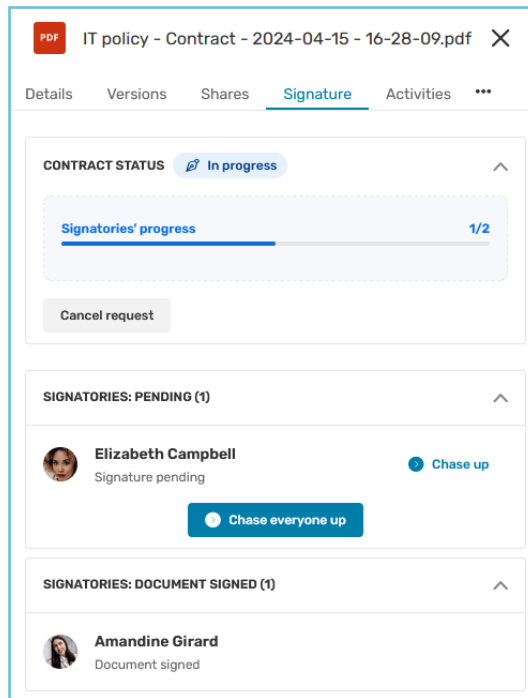
 Draft	Document awaiting sending
 In progress	Signature in progress
 Canceled	Signature canceled
 Signed	Signature validated

You can also monitor the signing process in real time from the **Signature** tab in the information panel.

1. Go to one of your teamspaces or **My space**.
2. Browse through your folders and select the document for which you wish to monitor the signature process.


3. Click on the  button on the right above your files to open the information panel, then click on the **Signature** tab.

You access information about the document signature:



Chase up your signatories


You can send a reminder to your signatories at any time.

1. Go to one of your teamspaces or **My space**.
2. Browse through your folders and select a document with a signature in progress.
3. Click on the  button on the right above your files to open the information panel, then click on the **Signature** tab.
4. In the **Signatories: pending** section, identify the signatory you want to remind and click on the **Chase up** button next to their name.

Tip: You can also remind all signatories who have not yet signed by clicking on the **Chase everyone up** button.

Cancel a signature request

You can cancel a signature request if the need arises.

1. Go to one of your teamspaces or **My space**.
2. Browse through your folders and select a document with a signature in progress.
3. Click on the  button on the right above your files to open the information panel, then click on the **Signature** tab.
4. In the **Contract status** section, click **Cancel request** and confirm.

Your signature request is canceled.


Download the proof file

Once the document has been signed and validated, a proof file is available to guarantee the integrity of the process.

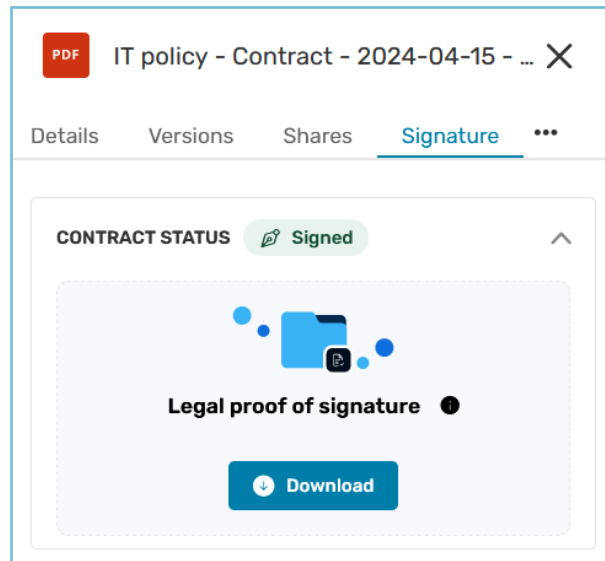
Le dossier de preuve comprend différents éléments :

- Le document signé au format PDF
- Les fichiers de preuves au format JSON et XML
- Le fichier de preuves au format PDF, qui est une représentation visuelle de la preuve XML contenue dans le dossier.

To download the proof file:

1. Go to one of your teamspaces or **My space**.
2. Browse through your folders and select a signed document.
3. Click on the  button on the right above your files to open the information panel, then click on the **Signature** tab.

4. In the **Contract status** section, click **Download**.



4. Create a new share

4.1. Introduction to share types

Oodrive Work_share allows you to share your sensitive documents and folders securely with your internal and external collaborators.

There are two categories of shares:

- **Unauthenticated shares:**

This category includes **shares via email** and **shares via link**. Shares via link enable you to transfer your files to your collaborators via a hypertext link or an email without requiring them to log in to the workspace.

- **Authenticated shares:**

This category relates to **collaborative shares**, which involve making a file available to your collaborators so that you can work together on a joint project. This type of share precisely manages the permissions granted to each individual, and therefore requires recipients to log in to the workspace.

The types of shares you will have access to depend on the configuration settings applied by your workspace administrator.

4.2. Create a share via link

Share your files using a hyperlink

1. In the navigation panel, click the **Documents** section.
2. Select the item(s) you want to share.
3. Click the **Share** button along the top of the page and select **Create link**.
4. Fill in the title of the share if desired, then change the sharing options according to your preferences:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Share end date | <input checked="" type="checkbox"/> Send me an activity summary |
| <input checked="" type="checkbox"/> End-of-share alert | <input checked="" type="checkbox"/> Apply watermark |
| <input checked="" type="checkbox"/> Password | |

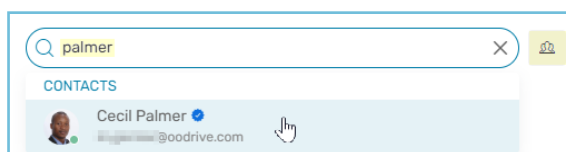
5. Once you have finished, click **Create link**.
6. Click **Copy link**, then forward the sharing link to your recipients via your chosen method.

Once they have this link, your recipients will be able to access the share, and will have the option of viewing and downloading the items it contains.

4.3. Create a share via email

Share your files via a hyperlink embedded in an email.

1. In the navigation panel, click the **Documents** section.
2. Select the item(s) you want to share.
3. Click the **Share** button along the top of the page and select **Via email**.
4. In the share creation menu, add one or more recipients by searching for a contact or entering a new email address.



Tip: Click  to select recipients directly from your address book.

5. Select the share permissions you want to assign to your recipients, then click **Next**.
6. If desired, fill in the email subject and message.
7. Edit the sharing options according to your preferences:

- | | |
|--|--|
| <input checked="" type="checkbox"/> Share end date | <input checked="" type="checkbox"/> End-of-share alert |
| <input checked="" type="checkbox"/> Delete files when share ends | <input checked="" type="checkbox"/> Max download limit |
| <input checked="" type="checkbox"/> Password | <input checked="" type="checkbox"/> Send me an activity summary |
| <input checked="" type="checkbox"/> Apply watermark | <input checked="" type="checkbox"/> Make recipients visible to one another |

Please note: The security options that are available, and the options available for changing them, are dependent on the settings configured by the administrator for your workspace.

8. Once you have finished, click **Share**.

Your recipients will receive an email giving them access to the share. Depending on the permissions you have chosen to grant them, they can either download or simply view the shared items.

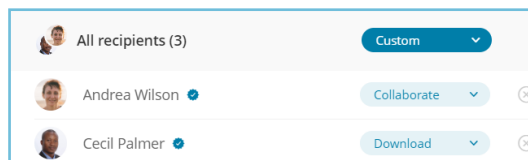
4.4. Create a collaborative share

Share files and folders with workspace colleagues and assign access permissions to each of them.

1. In the navigation panel, click on the **Documents** section.
2. Create a new folder by clicking **New**, then **Create a folder**.
3. Add all the items you'd like to share to the new folder.
4. Select the folder.
5. Click **Share**, then select **Create a collaborative share**.
6. In the sharing form, use the address book to add one or more recipients.

Note: To make things easier, a blue check mark indicates which colleagues you can add to a collaborative share.

7. Select the share permissions you want to grant your recipients.



When you create a collaborative folder, you can configure the access rights for all recipients at once or individually.

8. If needed, fill in the subject line and content of the email that will alert recipients to the new collaborative share.
9. Click **Next**, then modify the sharing options according to your preferences:
 - Share end date
 - Add a watermark
 - Make recipients visible to one another
 - End-of-share alert
 - Send me an activity summary
 - Send recipients an activity summary
10. When you are finished, click **Share**.

4.5. Make a quick share

Quick sharing allows you to quickly share items available on your computer, without having previously uploaded them onto your workspace.

This feature is only available in **My space**.

Quick share via link

1. In the navigation panel, click **Quick share**.



2. From your computer's file explorer, select the files and folders to share, then drag and drop to the quick share window.

Tip: Click **Add from the app** to select files from your workspace.

3. Select **Share via link** and change the sharing options as desired.
4. Click **Share via link**.
5. Click **Copy link**, then forward the sharing link to your recipients via your chosen method.

Quick share via email

1. In the navigation panel, click **Quick share**.

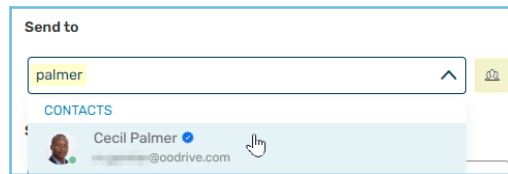



2. From the file explorer on your computer, select the files and folders you'd like to share, then drag-and-drop the selected items into the quick share window.

Tip: Click **Add from the app** to select items from your workspace.

3. Select **Share via email**.

4. In the **Send to** section, browse for contacts or enter a new email address to add one or more recipients.



Tip: Click  to select the recipients directly from your address book or to create a contact quickly via the **Create a contact** button.

5. If needed, enter the contents of the email message.
6. Modify the sharing options according to your preferences:

- | | |
|--|--|
| <input checked="" type="checkbox"/> Share end date | <input checked="" type="checkbox"/> End-of-share alert |
| <input checked="" type="checkbox"/> Delete files when share ends | <input checked="" type="checkbox"/> Max download limit |
| <input checked="" type="checkbox"/> Password | <input checked="" type="checkbox"/> Send me an activity summary |
| <input checked="" type="checkbox"/> Apply watermark | <input checked="" type="checkbox"/> Make recipients visible to one another |

7. When you are finished, click **Share via email**.

The recipients will receive an email containing a link allowing them to access and download the shared items.

5. Manage existing shares

You can modify or delete a share at any time. Below is the list of actions you can perform to manage your existing shares:

- Disable/re-enable a share
- Change recipients and their sharing permissions
- Change sharing options (end date, security options, email message, etc.)
- Automatically forward the access link to a share
- Delete a share

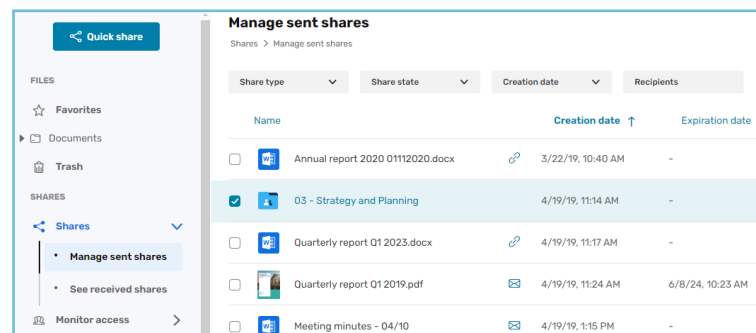
Please note: The available actions when modifying a share may depend on the type of share (via link, via email or collaborative).

5.1. Modify your shares

Modify shares individually

Modify recipients and sharing options

1. In the navigation panel, click **Shares > Manage sent shares**.



You view all your shares, as well as items that have been re-shared by your colleagues.

2. Use the filters along the top of the page to locate a specific share.



3. Click on the share you'd like to modify to view its details.
4. Click **Modify**.

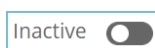
5. To update your changes, click **Validate**.

Please note: If your share has been re-shared by a colleague, you won't be able to modify the new share, but you will be able to disable or delete it.

Disable or re-enable share

A share that has been disabled can no longer be accessed by recipients, but may be re-enabled and made available to your colleagues once again at a later date.

1. In the navigation panel, click **Shares > Manage sent shares**.
2. In the share item you'd like to modify, click on the toggle switch.



When the toggle switch is grayed out, the share is inactive



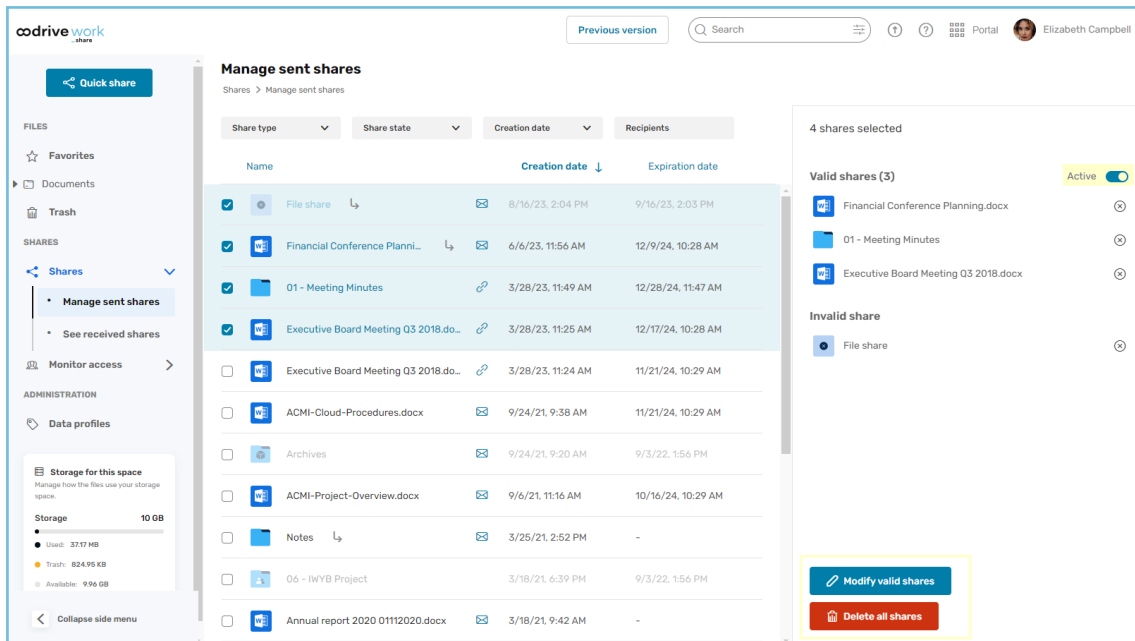
When the toggle switch is blue, the share is active

Modify shares in bulk

You can perform bulk actions on your shares from the **Manage sent shares** section of your application.

You can perform the following actions simultaneously on multiple shares:

- Modify the share end date
- Deactivate or reactivate the share
- Delete the share



Please note: Some shares do not meet the requirements for bulk editing and can only be deleted. Known as "invalid" shares, they will need to be modified individually because they contain an error to be fixed.

A share can be considered invalid for the following reasons:

- It was sent to a recipient who no longer exists (deleted)
- It contains a shared item that no longer exists (deleted)
- It has been configured with permissions that have later been restricted by the workspace administrator

If your selection contains both valid and invalid shares, changes to the share end date and/or status will only apply to valid shares, while deleting will apply to the entire selection.

1. Log in to your workspace and access your collaboration app.
2. In the navigation panel on the left, click **Shares**, then **Manage sent shares**.
3. Select the shares you want to modify.

4. Modify the selected shares.

- **To modify the share end date:** In the panel on the right, click **Modify valid shares**, enter the new share end date, then click **Edit**.
- **To enable/disable shares:** In the panel on the right, use the toggle switch next to **Valid shares** to change the status of your shares.
 - To disable a selection of active shares, click on the toggle switch and then on **Disable**.
 - To reactivate a selection of inactive shares, click on the toggle switch and enter a new share end date before clicking **Change and re-enable**.
 - To change the active/inactive status of a mixed selection, click the **Several Statuses** toggle switch. Then, select the action to perform on all shares and confirm your choice.
- **To delete shares:** In the panel on the right, click **Delete all shares** and then **Delete**.

5.2. Manage access to your collaborative shares

Manage your collaborative shares from the **Monitor access** section. You can:

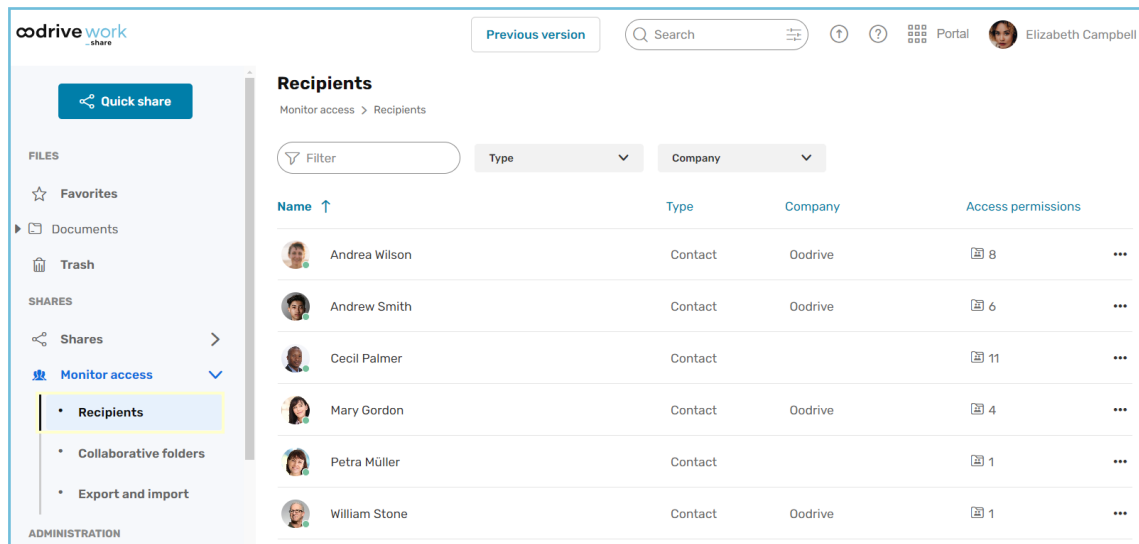
- Consult an overview of your collaborative shares arranged either by recipients or by collaborative folders.
- Make individual changes to recipient access permissions.
- Make batch changes to recipient access permissions via an XLSX or CSV file.

Update user access permissions individually

Manage your collaborative shares by recipient

The **Recipients** section provides you with a quick overview of all recipients of your collaborative shares. You can use the supplied filters to find a particular recipient. From this section, you can also modify recipients' access permissions to one or more of your shares.

1. Log in to your workspace and access your collaborative application.
2. In the navigation panel on the left, select the **Monitor access** section, then **Recipients**.




3. In the **Recipients** section, sort the display order of your recipients by clicking the column titles:


- Name
- Type of recipient (contact or group)
- Company
- Access permissions (number of folders collaboratively shared with the recipient)

Use the search bar and filters to search for a specific recipient.

4. Click the recipient whose access permissions you want to modify.
5. Modify the permissions assigned to the recipient for one or more collaborative shares.
 - To modify the permissions assigned to the recipient for a specific share, click on the permission in the right-hand column, then select the access permission you want to assign to the recipient for this specific share.
 - To modify the permissions assigned to the recipient for all collaborative folders you have shared with that recipient, go to the first line with the title **All collaborative folders** and select the permission you want to assign to the recipient for all collaborative folders to which that recipient has access.

Note: In the event of an error, you can click  to the right of the modified access permission to cancel your changes.

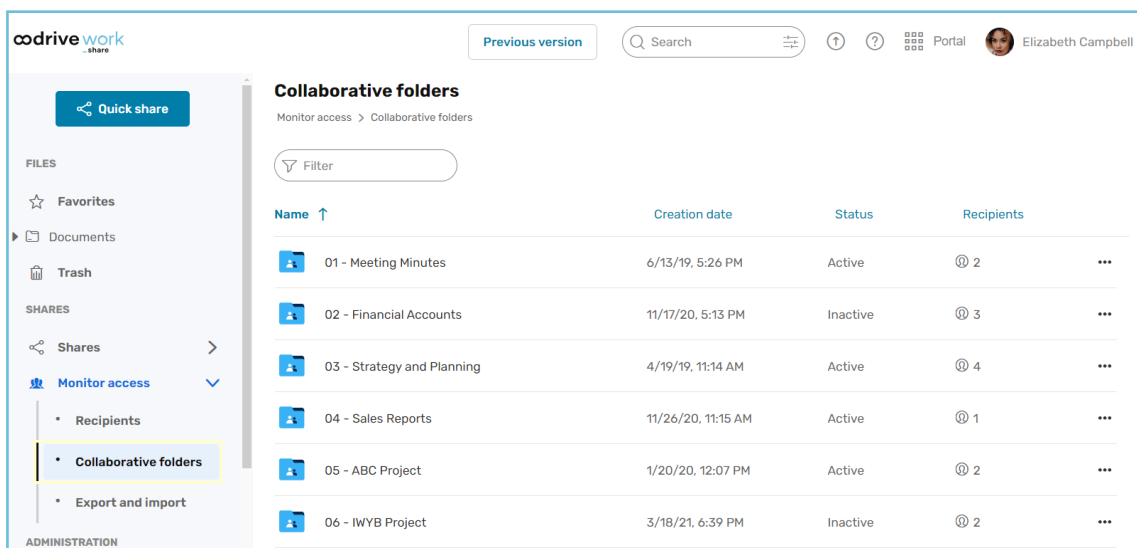
6. Once you have finished, click **Save** at the bottom of the page, then click **Confirm**.

Note: To remove the recipient's access to all the collaborative shares in which they are included, click the  button or right-click the recipient in question, then click **Remove all access permissions**.

Manage your collaborative shares by collaborative folder

You can quickly browse all of your collaborative shares, arranged by folder, and manage recipients' access permissions to these folders via the **Collaborative folders** section.

1. Log in to your workspace and access your collaborative application.
2. In the navigation panel on the left, select the **Monitor access** section, then **Collaborative folders**.




3. In the **Collaborative folders** section, sort the display order for your collaborative shares by clicking the column titles:
 - Name
 - Date created
 - Share status (active or inactive)
 - Recipients (number of recipients for the collaborative share)

Use the search bar to search for a specific collaborative folder.


4. Select the collaborative folder for which you want to modify access permissions for one or more recipients.

5. Modify the permissions assigned to one or more recipients for a given collaborative share.
 - To modify the permissions assigned to a specific recipient of this share, click the drop-down menu in the **Access permissions** column, then select the level of access you want to assign to the recipient for this specific share.
 - To modify the permissions assigned to all recipients of this share, go to the first line with the title **All recipients** and select the level of access you want to assign to all recipients of the share.

Note: In the event of an error, you can click  to cancel your changes.

6. Once you have finished, click **Save** at the bottom of the page, then click **Confirm**.

Note:

- To delete a collaborative share, right-click the collaborative share in question, then click Delete the share.
- For quick access to the content of a collaborative share in the file manager, click  or right-click the collaborative share in question, then click Go to the folder.

Update user access permissions in bulk

You can manage access permissions to your collaborative shares in the **Monitor access > Export & import** section of your application.

To manage access permissions in bulk, you need to export an Excel or CSV file. This file lets you retrieve and update the access permissions of recipients associated with your collaborative folders in bulk. Once the changes have been made, import the updated file to your workspace to update your collaborative shares.

Note: You cannot use the export file to edit user information or the share status (active versus inactive). Sender and recipient unique identifiers (**senderUUID** and **recipientUUID**) automatically determine this information.

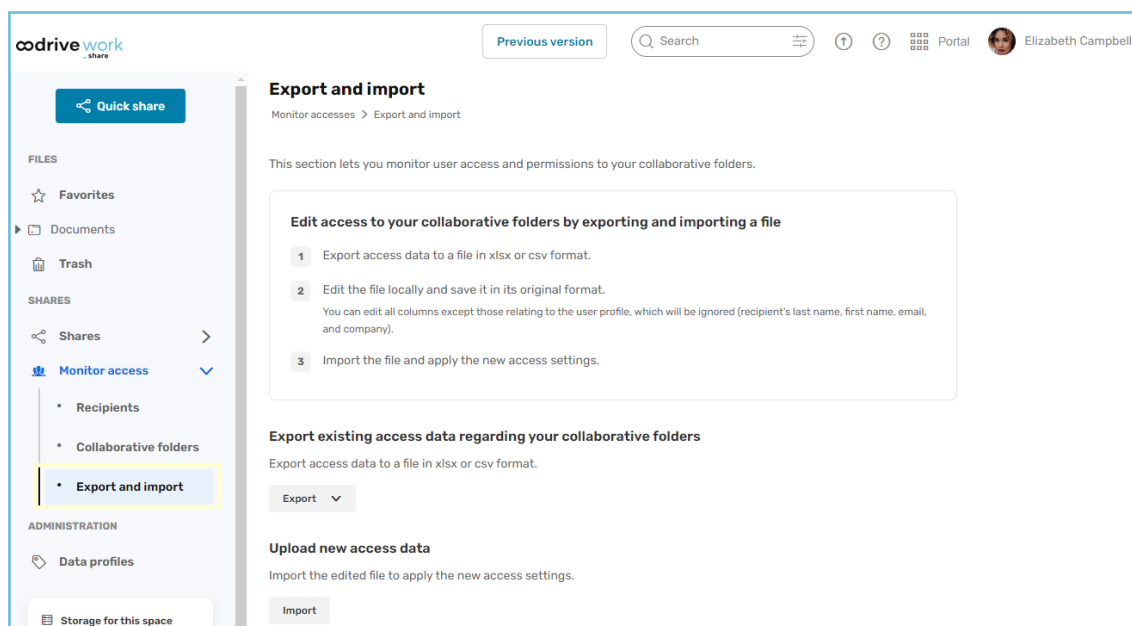
Below, you will find a description of the columns in the access permissions file:

Column title	Description
senderUUID	Sender's unique identifier
recipientUUID	Recipient's unique identifier
sender	Sender's name
recipient	Recipient's name
recipientEmail	Recipient's email address
recipientCompany	Recipient's company
path	Collaborative folder path shared by the sender
isActive	The share is active if the box is selected.
canAccessShare	The recipient is included in the share if the box is selected.
view	The recipient can access the share in view-only mode if the box is selected.
download	The recipient can view and download the share content if the box is selected..
edit	The recipient can view, download, upload, and edit the share content if the box is selected.
organize	The recipient can view, download, upload, edit, and delete the share content if the box is selected.
collaborate	The recipient can view, download, upload, edit, delete, and share the share content if the box is selected.

Step 1: Export the access permissions file

1. Log in to your workspace and access your collaborative application.
2. In the navigation panel on the left, select the **Monitor access** section then **Export and import**.

3. In the **Monitor access** section, click **Export** along the bottom of the page, then select a file format to download (XLSX or CSV).



The download will start automatically in your browser.

4. Once the download is complete, open the file and save it to your computer.

Step 2: Edit access permissions

1. Open the downloaded export file on your computer.
2. Browse the file and find the collaborative share recipient whose access permissions you want to edit by looking in the **recipient** column.
3. Once you have found the relevant recipient, find the target collaborative share by looking in the **path** column.

4. Edit user access permissions.

- **To modify a user's permissions:** move “**X**” to the column which corresponds to the permission set that you want to assign:
 - **view** to view
 - **download** to view and download
 - **edit** to view, download, upload, and edit
 - **organize** to view, download, upload, edit, and delete
 - **collaborate** to view, download, upload, edit, delete, and share.

You must select only one box with “**X**” among the available permission sets, because these are sorted in ascending order of the granted permissions. The further you move “**X**” to the right, the more permissions the user will have and vice versa.

- **To remove a user from a collaborative share:** only remove “**X**” from the **canAccessShare** column.
- **To add a user to a collaborative share:** the user must already be part of an existing collaborative share. If this is the case, you can retrieve the user's **recipientUUID** as well as the information required to add and complete a line in the file.

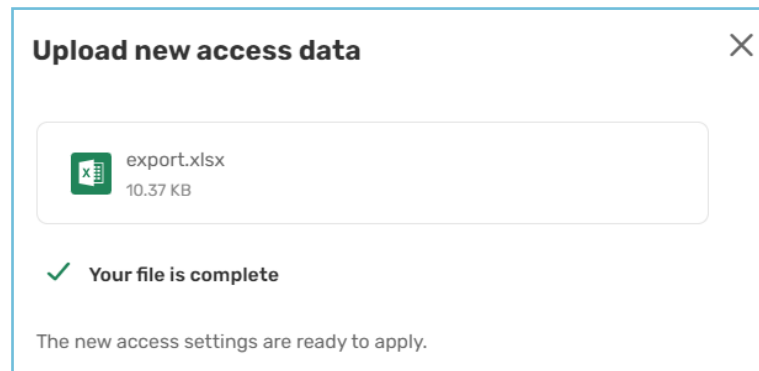
5. Repeat steps 2, 3 and 4 until you have finished.

	E	F	G	H	I	J	K	L	M	N
1	recipientEmail	recipientCompany	path	isActive	canAccessShare	view	download	edit	organize	collaborate
2		Oodrive	/Fichiers/05 - ABC Project/Meetings	X	X					X
3		Oodrive	/Fichiers/02 - Financial Accounts		X	X				
4		Oodrive	/Fichiers/03 - Strategy and Planning	X	X					X
5		Oodrive	/Fichiers/05 - ABC Project/Knowledge/ABC Project Guidelines	X	X	X				
6		Oodrive	/Fichiers/01 - Meeting Minutes	X	X					X
7		Oodrive	/Fichiers/02 - Financial Accounts		X		X			
8		Oodrive	/Fichiers/03 - Strategy and Planning	X	X					X
9		Oodrive	/Fichiers/04 - Sales Reports	X	X					X
10		Oodrive	/Fichiers/05 - ABC Project	X	X					X
11		Oodrive	/Fichiers/05 - ABC Project/Knowledge/ABC Project Guidelines	X	X					X
12		Oodrive	/Fichiers/05 - ABC Project/Knowledge/Pictures	X	X					X
13		Oodrive	/Fichiers/05 - ABC Project/Knowledge/Presentations	X	X					X
14		Oodrive	/Fichiers/05 - ABC Project/Meetings/Meetings	X	X					X
15		Oodrive	/Fichiers/05 - ABC Project/Meetings/Notes	X	X					X

6. Once you have made your changes, save the file to your computer.

Step 3: Import the access permissions file

1. In the **Monitor access > Export and import** section, click **Import** along the bottom of the page.
2. In the window that appears, click on **Browse my files** to select the edited access permissions file saved on your computer.



3. Click on **Confirm and apply** to update your collaborative shares.

Note: An error message may appear during import, for instance if your file contains access permissions that have been removed from the workspace by your administrator.

No changes will be taken into account if your file contains errors during import, and a message will tell you the position and character of the errors to help you complete your import successfully.

5.3. Resend an access link

If one or more of your collaborators has lost their access link to a share – for example, by deleting the email that contained it – you can resend it without having to create a new share.

1. In the navigation panel, click **Shares > Manage sent shares**.
2. Select the share for which the access link has been lost.
3. If it is a collaborative or email share, click **Resend invitation** in the right-hand panel. The sharing email will be resent to all recipients.
4. If it is a share via link, click **Copy link** and send it to your recipient via the method of your choice.

5.4. Delete a share

If you want to temporarily block access to a share, you could choose to disable it instead.

To delete a share:

1. In the **Manage sent shares** section, identify the share you'd like to delete.
2. From the **Details** tab on the right, click **Delete**.
3. To permanently delete the share, click **Delete**.

Please note: Deleting a share does not delete the original files from your documents.

6. Track your shares

To help you maintain control over what you share, Oodrive Work_share allows you to track activity for your shares. You can also manage the activity notifications you receive for a collaborative share, regardless of whether you are the sender or the recipient.

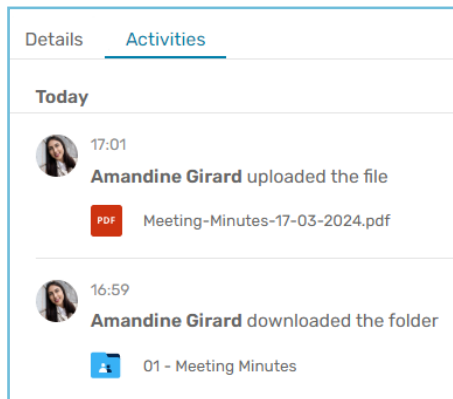
6.1. Track activity for a share

The information panel for a share shows the activity history of shared items. This allows you to see which actions you and your collaborators have performed, on which shared item and on what date.

Actions listed in the information panel include:

- View a file
- Download a file/folder
- Drop, create, delete a file/folder
- Edit, move and copy a file/folder
- Create and delete a memo

1. In the navigation panel, click **Shares > Manage sent shares**.
2. Select a share to display its details, then click on the **Activities** tab.
3. You view the actions of your recipients on the share.

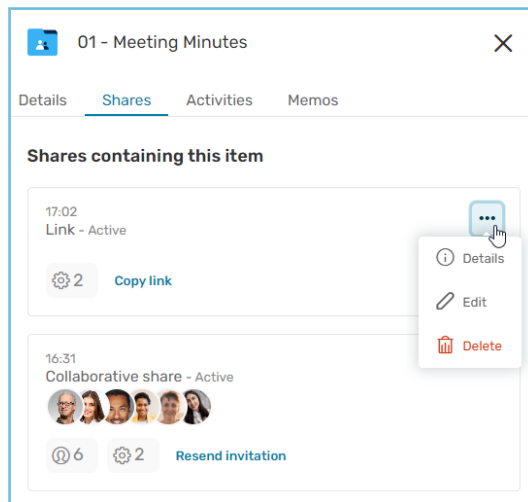


Please note: You can also track activity for a specific file in the **Documents** section. To do so, select an item, open the information panel and go to the **Activities** tab.

6.2. View shares that contain a specific file or folder

From the file manager of a space, you can view a list of the shares that contain a specific file or folder by consulting the **Shares** tab in the information panel.

1. In the navigation panel, click **Documents**.
2. Select a file or folder to view its details, then click the **Shares** tab.
3. This shows you all the shares containing your file or folder.
4. If you want to perform an action on one of these shares, click the three small dots to its right and select the action to perform (see details of the share, modify it or delete it).



6.3. Manage notifications for collaborative shares

Activity notifications are sent via email in the form of an activity summary listing the actions performed on a collaborative share (either sent or received).

Please note: The activities which prompt the sending of activity summary emails are the following:

- Dropping, creating or deleting a file/folder
- Modifying, moving or duplicating a file/folder
- Creating or deleting a memo

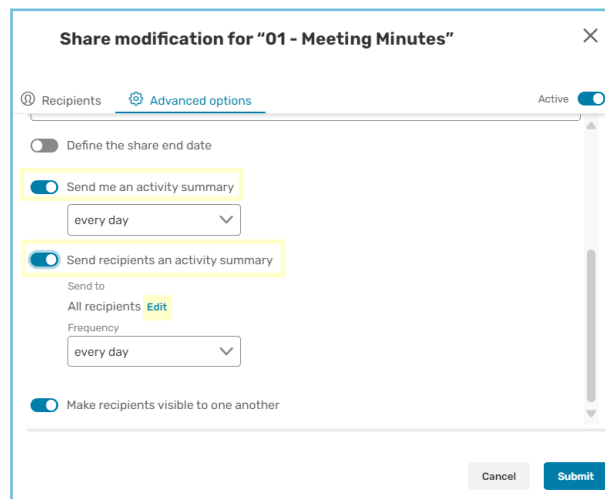
Activities such as downloading and viewing an item are not featured in the activity summary, but you can view them in the **Activities** tab of each individual item.

As the sender of a collaborative share

If you create a collaborative share, you can choose before sending to enable activity notifications for yourself as well as for recipients, and to select the frequency at which these notifications are sent.

If you have not enabled notifications before sending a collaborative share, you can modify that share at a later date to enable notifications or modify their sending frequency.

1. Log in to your workspace and access your collaboration app.
2. Go to the **Shares > Manage sent shares** section and select the collaborative share you want to modify.
3. Click **Edit**.
4. In the new window, click the **Advanced options** tab.
5. To receive notifications, enable the **Send me an activity summary** toggle switch and select a notification sending frequency:
 - at once
 - every hour
 - every day
 - every week
 - every month
6. To manage recipient notifications, enable the **Send recipients an activity summary** toggle switch and select recipients as well as the sending frequency.
7. Once you have made your changes to the sharing options, click **Submit**.



Modify the share again at any time to disable notifications or modify the sending frequency.

Please note: As the sender of a collaborative share, you can also manage activity notifications from the Oodrive Work mobile app.

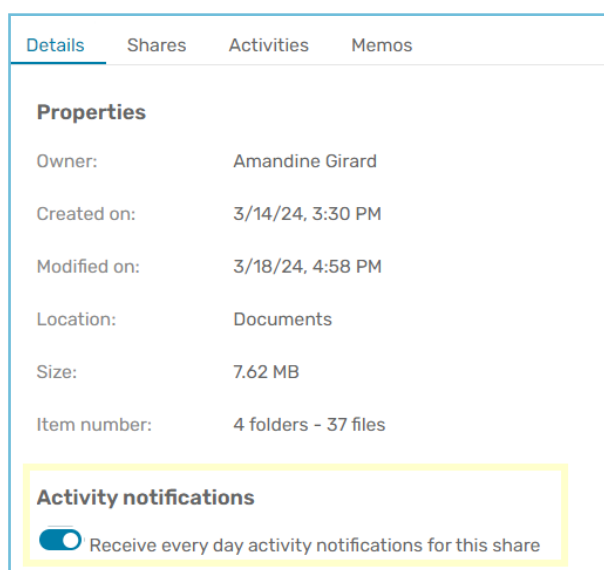
As the recipient of a collaborative share

If you the sender of a collaborative share has enabled recipient notifications for you, you will be able to manage your activity notifications for that share.

To enable or disable activity notifications for a received share:

1. Log in to your workspace and access your collaboration app.
2. Select the collaborative share you want to manage in the **Documents** section. If the share details are not displayed, click ⓘ to open the information panel.
3. In the **Details** tab, click the toggle switch located in the **Activity notifications** section in order to enable or disable notifications.

The sending frequency of these notifications is set by the creator of the collaborative share. You cannot modify it.



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