oodrive work

User Guide

Oodrive Work

Terms of use

Distribution list

Company	Role
Oodrive Group	Oodrive Group colleagues and customers

oodrive work

Contents

1. Getting started with Oodrive Work

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

Oodrive Work 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

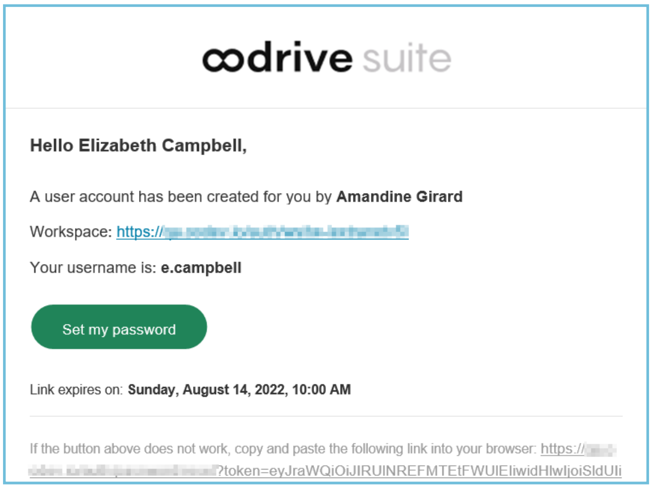
1.1. Log in to your workspace

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 

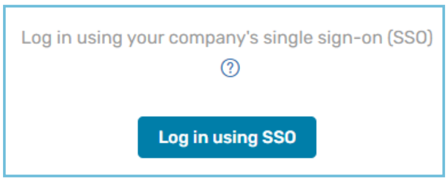
in the upper-right corner of the page, then select **Portal**.

Please note: As a security measure, you will be automatically logged out of your session after 30 minutes of inactivity (or after 4 hours if the Oodrive Work discussion feature is enabled). 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**.

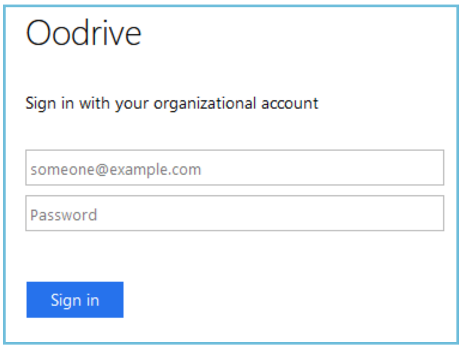
Log in with your company login credentials

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**.

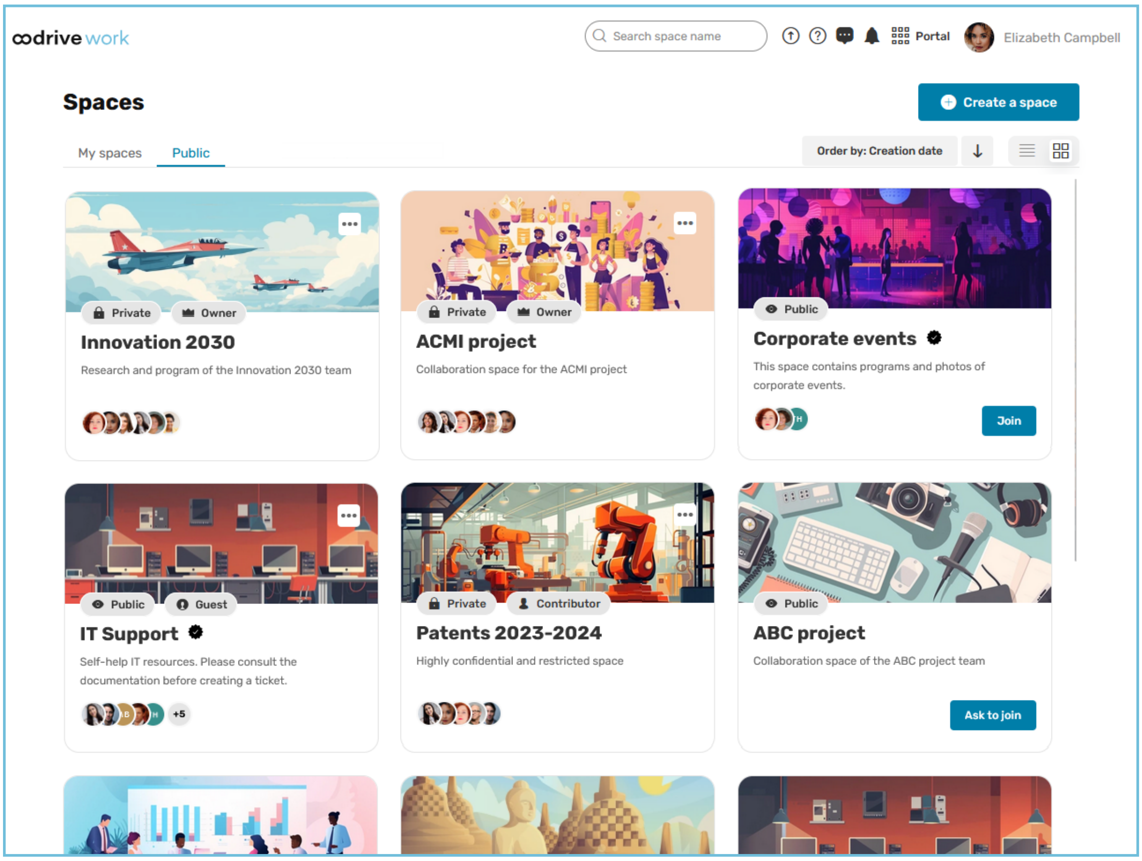
Please note: As a security measure, you will be automatically logged out of your session after 30 minutes of inactivity (or after 4 hours if the Oodrive Work discussion feature is enabled). You can extend your session by clicking **Continue to browse** when the logout warning appears on the screen.

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

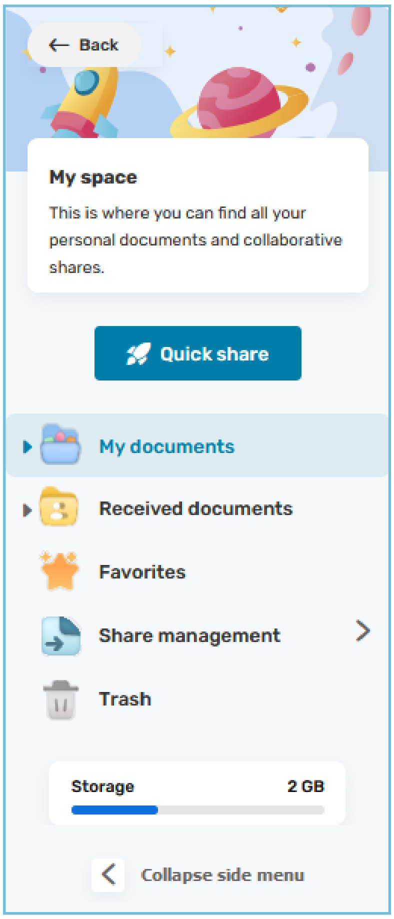
1.2. Overview of the Oodrive Work web application

Oodrive Work 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.

From the home page of your Oodrive Work application, you can access your personal space **My space** as well as the teamspaces available within your organization.



When you enter your personal space or a teamspace, the navigation panel on the left side of the page allows you to quickly access the sections of the application.


Back
My space
This is where you can find all your personal documents and collaborative shares.
Quick share
My documents
Received documents
Favorites
Share management
Trash
Storage
2 GB
Collapse side menu

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

Section	Action
Documents / My documents	Browse and manage your teamspace files and folders. In **My space**, you will find your own files and folders.
Received documents	Browse items that have been shared with you via collaborative share or email (only in **My space**).
Favorites	Find the folders and files you have added to your favorites (only in **My space**).
Manage sent shares / Share management	Access sent shares to consult and/or manage them.
Members	View and manage members (only in teamspaces)
Trash	Find the items you have deleted so that you can restore or permanently delete them.
Storage	View how much storage space is available.

1.3. Browse your files and folders

Go to the **Documents** section of a teamspace to view all the folders and files it contains. In your personal space, the **My documents** section contains your own files and folders while the **Received documents** section allows you to browse items that have been shared with you.

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

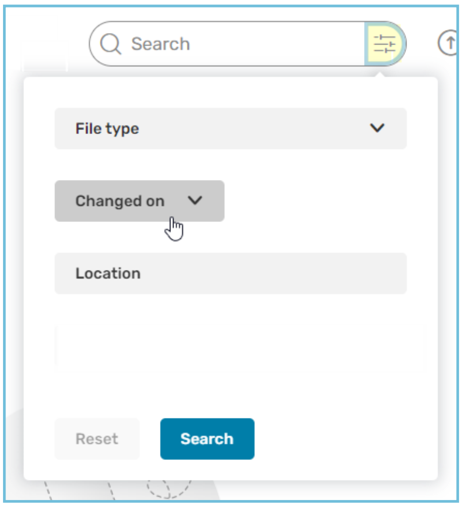
Quickly find your documents by searching for keyword or by criteria.

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



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.

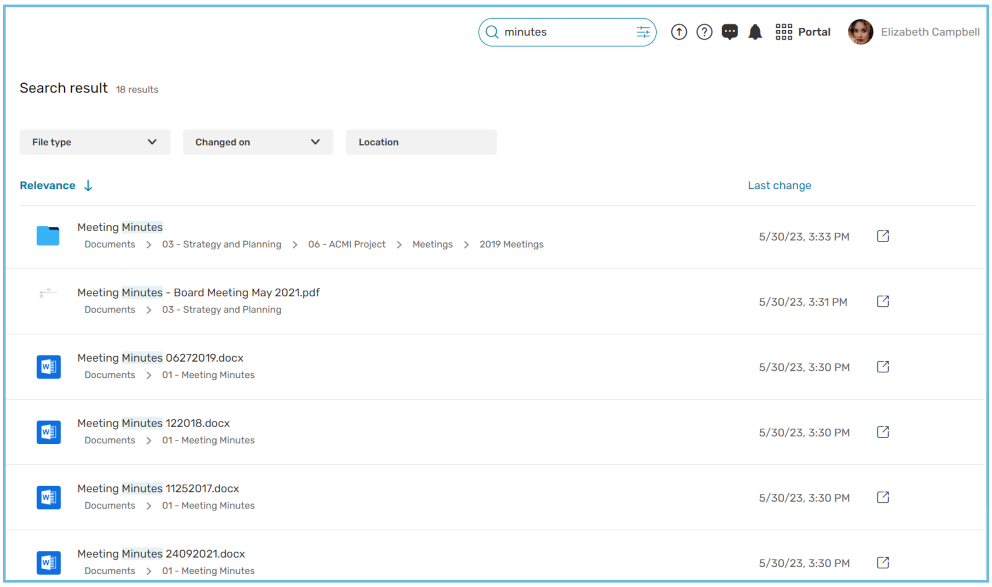
You can also access the folder where the document is located by hovering your mouse over it and clicking **Show in folder**.

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.

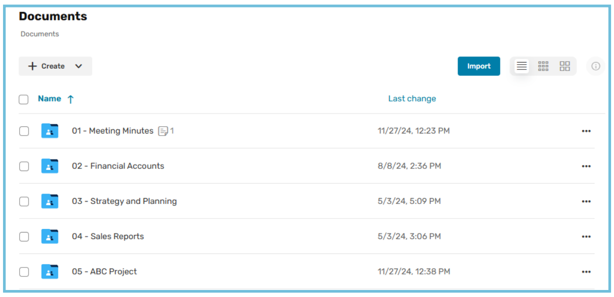
You can also access the folder where the document is located by hovering your mouse over it and clicking **Show in folder**.

Choose how your folders or files are displayed

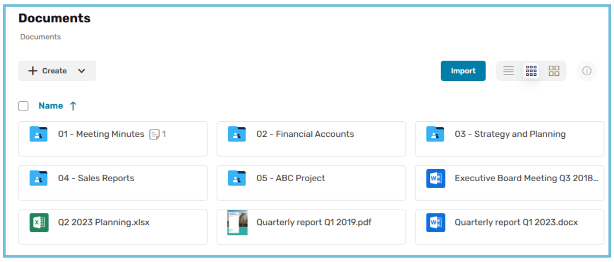
You can change the presentation of your folders and files according to your viewing preferences.

To do so, click the icon **List**, **Grid** or **Large-format grid**.

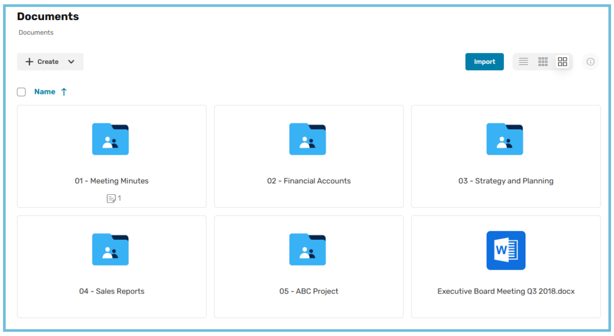
"List" view



"Grid" view



"Large-format grid" view

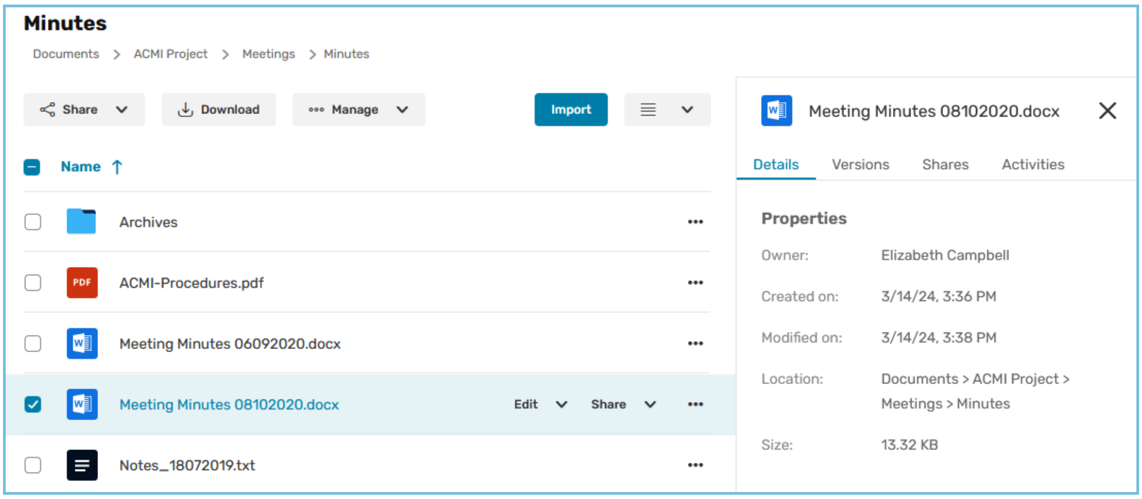


Display details for an item

To view the details for a file or folder:

1. Browse your file and folder structure and select the item for which you want to see the details.

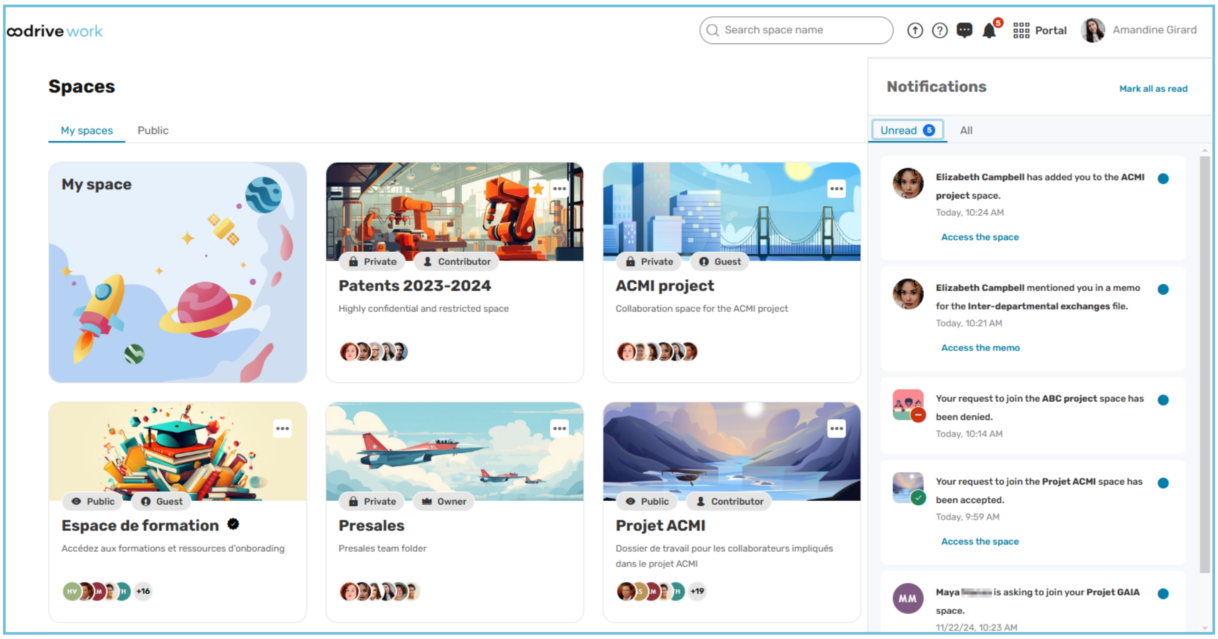
2. Click in the upper-right corner of your files list to open the information panel.



3. 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. View your notifications

A notification center is available in the Oodrive Work application.

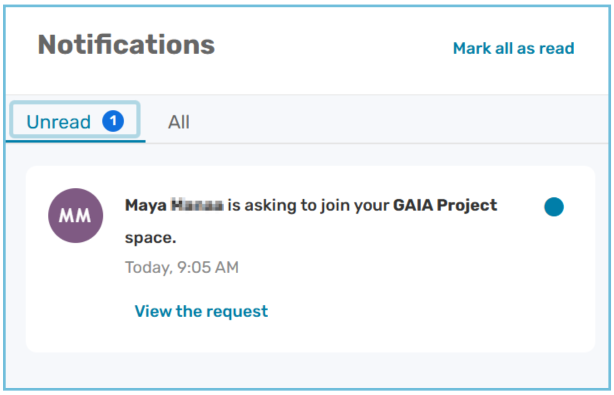


You are notified when:

- a user requests to join a space you own.
- a colleague adds you to a teamspace.
- your request for access to a teamspace has been approved or denied.
- you have been mentioned in a memo.
- you receive a share via email, a collaborative share or share via drop box.
- a share you have sent and for which you have enabled the end-of-share alert is about to expire.

To view your notifications, click on the bell-shaped icon in the upper right corner of the screen. Notifications are deleted after 6 months.

Notifications are displayed from the most recent to the oldest, and a blue dot indicates those that have not been viewed:



Some notifications include a link for direct access to the memo, teamspace or share in question.

1.5. Install the EasyTransfer desktop application

EasyTransfer is the desktop application for managing transfers to and from Oodrive Work. 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 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 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:

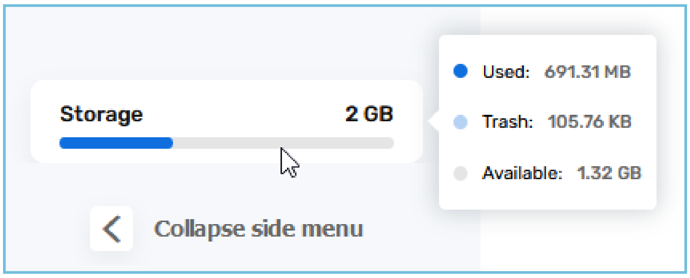
- uploading folders and files from your computer
- creating new files and folders directly in your workspace
- importing files from one teamspace into another

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 your 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

Depending of the type of teamspace as well as your access rights, you can upload files into a teamspace.

1. From the home page of your Work application, select the space to which you want to add documents.
2. If you want to add files to a specific folder, browse your folders and open the folder of your choice.
3. Import the items of your choice.

To import items from one of your spaces:

- Click **Import**, then **From my spaces**.
- Click on the space containing the items you want to import, then click **Select**.
- Select the files you want to import and click **Import**.

To upload files from your computer:

- Click **Import**, then **Import files**.
- Browse the file explorer on your computer and select one or several files by holding down the **Ctrl** key, then click **OK**.

To upload a folder from your computer:

- Click **Import**, then **Import folder**.
- Browse the file explorer on your computer and select the folder of your choice, then click **OK**.

The selected items are added to your space.

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 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. 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.
3. Click **Create** and select **Create a folder** .
4. 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. 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.
3. Click **Create** and select **Create a file**.
4. Select the type of file you want to create: **Word**, **Excel**, or **PowerPoint**
5. 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	Move a file or folder in your file manager. 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.
Copy	Create a copy of a folder or file. **Please note**: You cannot copy a folder to its original location or to one of its child folders.
Rename	Rename a file or folder.
Lock	Lock a file to protect it from changes. 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.

Action	Result
Add to favorites	[Only in **My space**] Add a folder or file to your favorites for quick access. Your favorites are marked with a star. You can remove an item from your favorites at any time by selecting it and clicking **Manage** > **Remove from favorites**.

2.3. Edit documents

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

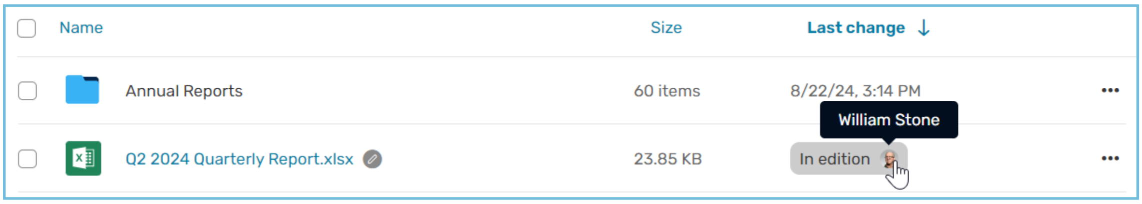
Edit a document with Microsoft Office

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.

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

When another user edits a document with Microsoft Office, it is temporarily locked.

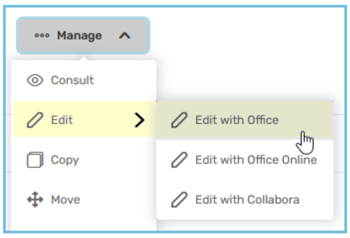
Hover your mouse over the document to view the name of the person editing it.



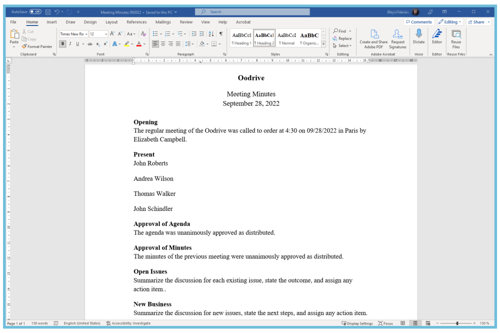
1. From the home page of your Oodrive Work application, click on the space containing the document you want to edit.

2. Browse your file manager and select the file you want to edit.

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.

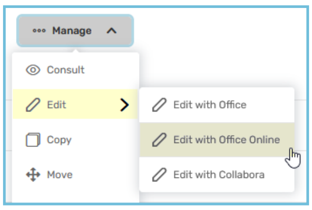
You can edit your own files as well as shared files for which you have editing rights.

1. From the home page of your Oodrive Work application, click on the space containing the document you want to edit.

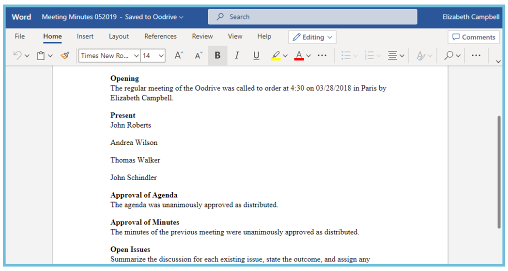
2. Browse your files and select the file you'd like to edit.

   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

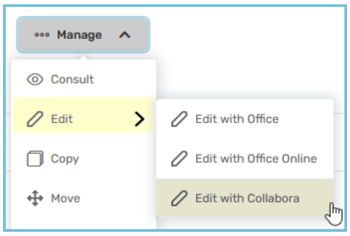
Collabora Online is a solution that allows you to edit your sensitive documents online in a secure, sovereign environment.

1. From the home page of your Oodrive Work application, click on the space containing the document you want to edit.

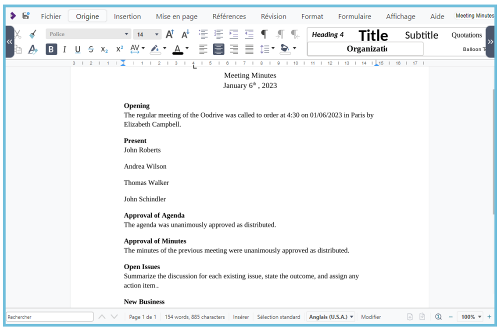
2. In the navigation panel, click the **Documents** section.

3. Browse the file manager and select the file you want to edit.

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



   The document opens in a new tab.



5. Make changes as desired.

6. 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 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.

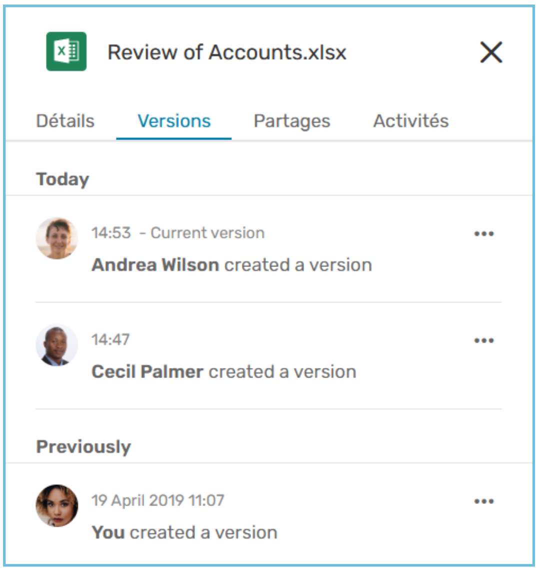
To manage versions of a document:

1. Browse your file manager and select the file for which you want to view the versions.

2. Click in the upper-right corner of the files list to open the information panel.

3. 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.



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

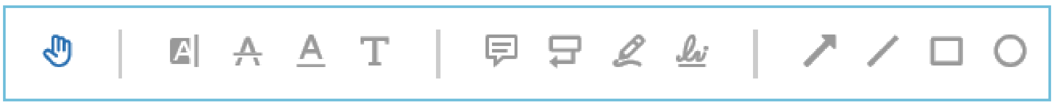
   Please note: Only the owner of the document can delete a version. If you are a recipient of the document via collaborative sharing, you can only consult and download previous versions.

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.

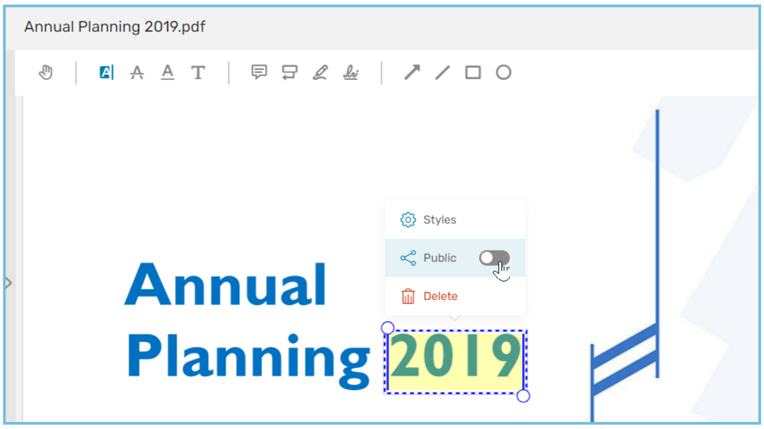
This feature is particularly useful if you want to collaborate on a document for which you do not have editing permissions.

1. Browse your file manager and select the file you want to annotate.
2. Click **Manage**, then **Consult** to open the document viewer.
3. Click the annotation icon in the upper-right corner of the viewer.
4. Use the toolbar above the document to annotate it.



Once added, annotations are saved automatically.

5. 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.

6. 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.

To access the list of viewable formats on Oodrive Work, please refer to this document: Viewable data formats (PDF).

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. Browse your file manager and select the file or folder to which you want to add a memo.

2. Click **Manage** and select **Create a memo**.

3. 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.

4. 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. 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. Browse your file manager and 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

Please note: Only Owners may permanently delete files from a teamspace's Trash.

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.

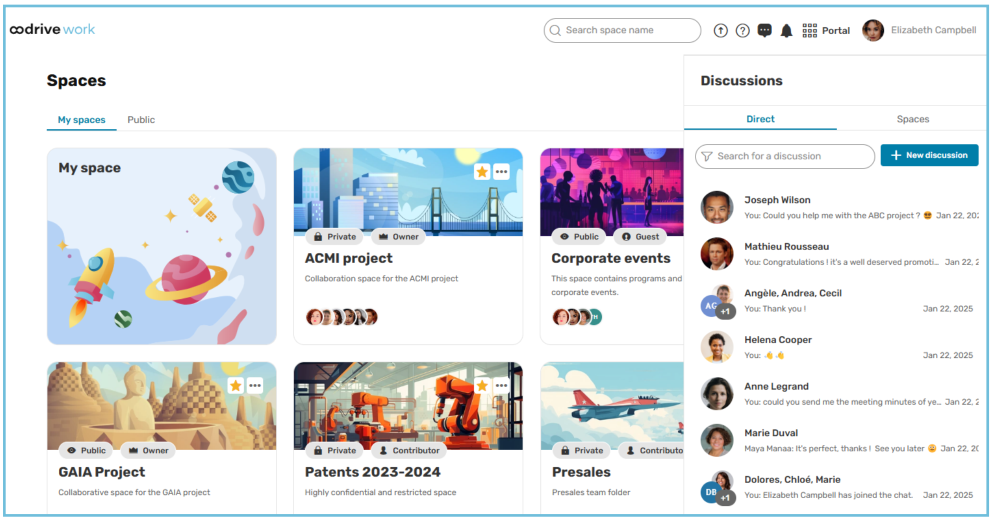
3. Chat with your colleagues

Please note: The discussion feature is not available in a SecNumCloud-qualified Private Cloud environment.

3.1. Introduction

Oodrive Work's **Discussion** feature allows you to communicate in real time with colleagues in your workspace.

You can choose between two types of **Discussion**, each designed to meet specific needs.



Discussion types

There are two types of discussion:

- **Direct conversations** allow you to chat with one or more colleagues of your choice.
- **Team discussions** gather all members of a teamspace.

Access discussions

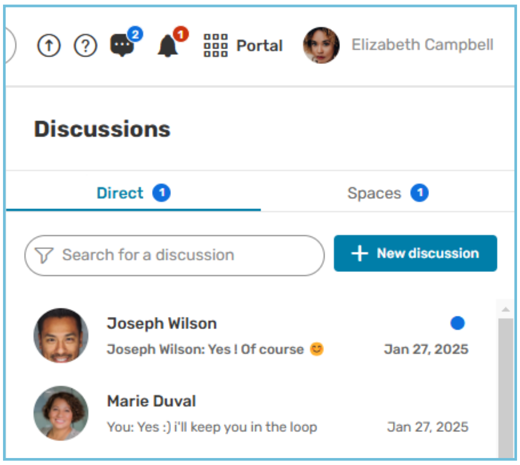
You can access your conversations from the home page by clicking the **Discussions** icon in the upper-right corner of the screen:

- **To access direct conversations:** go to the **Direct** tab.
- **To access teamspace discussions:** go to the **Spaces** tab.

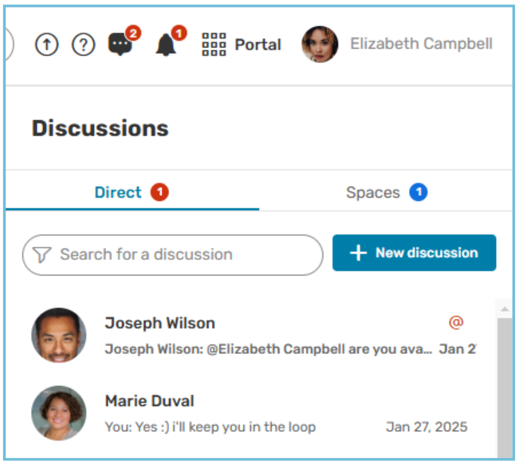
If you want to find a specific conversation, enter the name of the colleague or teamspace in the search bar.

Discussion notifications

When you receive a message, a blue dot appears on the Chat icon to notify you. When you have been tagged in a message, the dot becomes red and an **@** symbol appears on the tile of the concerned discussion:



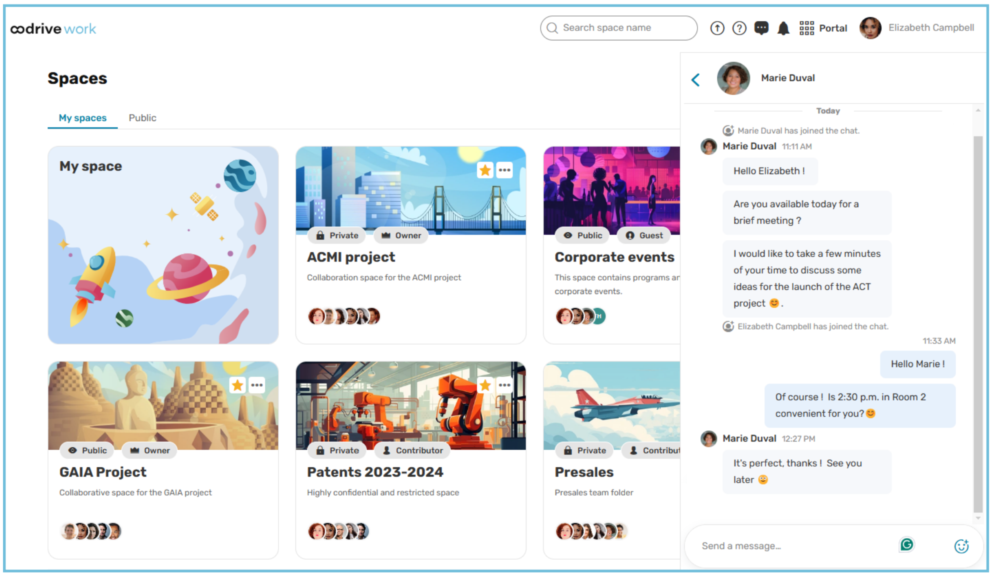
New message



New message you're tagged in

3.2. Start a direct conversation

You can start a direct conversation with one or more colleagues in your workspace from the Oodrive Work home page.



1. On the home page, click the **Discussions** icon, then the **Direct** tab.

2. To start a new conversation, click **+ New discussion**.

3. In the new discussion menu, select one or more colleagues in your address book.

4. When you have finished, click **Submit**.

A new chat room is created and you can start chatting.

Please note: If a discussion with the same members already exists, you will be redirected to this discussion instead.

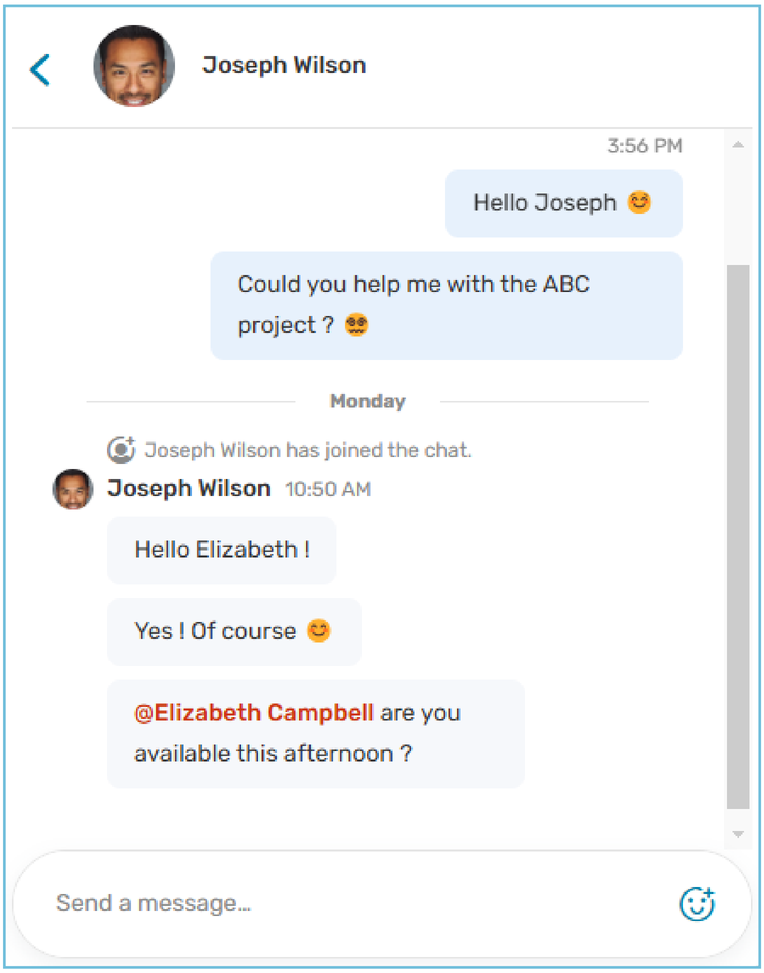
Send a message

1. Start a new discussion or access an existing one.

2. In the open discussion, enter your message.

   Insert emoticons: click the icon and select the emoticon of your choice.

   Tag a colleague: enter **@** and select a colleague in the list. You can also tag all members by selecting **@Everyone**.



3. When your message is ready, click or press the **Enter** key.

Edit a message

You can edit a message you have already sent.

1. Hover over the message and click the **Edit** icon .

2. Edit your message, then confirm by clicking the **Edit** icon .

   To discard your changes, click the **Cancel** icon × then on **Delete**.

Messages that have been edited are labelled as such.

Delete a message

If necessary, you can delete one of your sent messages.

1. Hover over the message and click the **Delete** icon.
2. Click **Delete** again to confirm.

React to a message

1. Hover over the message and click the **React** icon.
2. In the pop-up window, select an emoticon.

Reply to a message

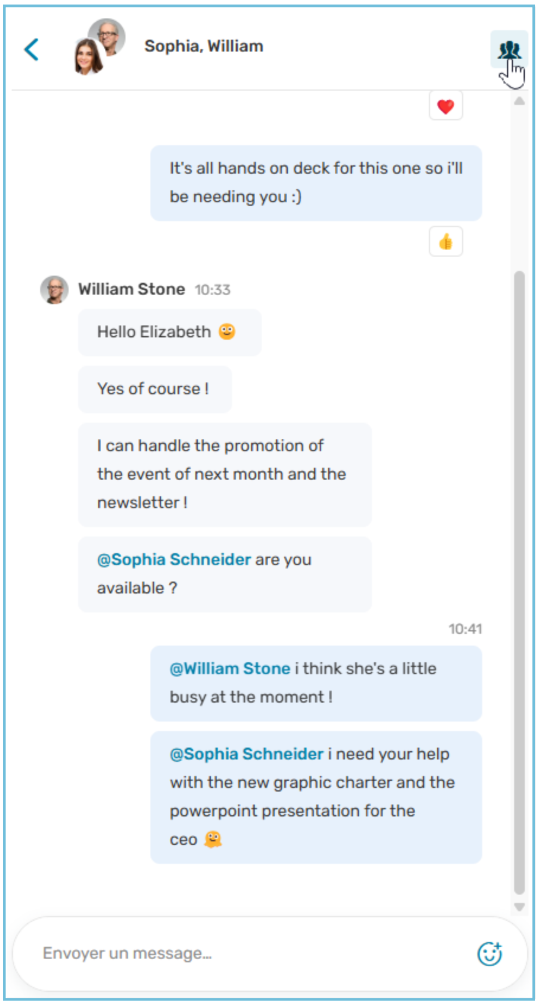
1. Hover over the message and click the **Reply** icon.
2. Enter your reply and click or press the **Enter** key.

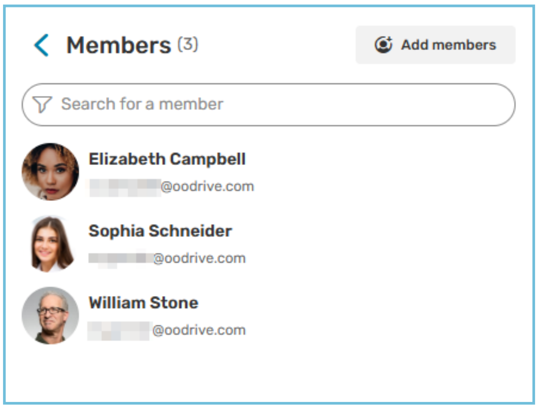
3.3. Manage members of a direct discussion

If you are a member of a group discussion, you can add or delete members at any time.

View members in a direct discussion

You can view the members in a group discussion by clicking on the **Members** icon along the top of the discussion panel.

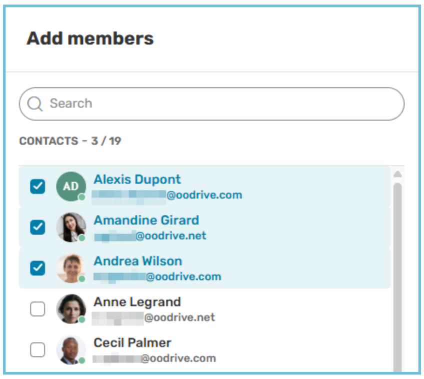




If you want to find a participant in particular, enter the collaborator's name in the search bar.

Add members

1. On the home page, click the **Discussions** icon, then the **Direct** tab.
2. Go to the group discussion for which you want to manage members.
3. Click the **Members** icon along the top of the discussion panel
4. Click **Add members**.
5. Using the address book, select the collaborators you want to add to your group discussion.



6. When you have finished, click **Add**.

Added collaborators can now take part in the discussion and view the message history.

Delete members

1. On the home page, click the **Discussions** icon, then the **Direct** tab.
2. Go to the group discussion for which you want to manage members.
3. Click the **Members** icon along the top of the discussion panel
4. Enter the name of the member you want to remove in the search bar to find it easily.
5. Hover over the member you want to remove and click the X next to their name.
6. Click **Submit**.

Please note: A deleted member can still view the conversation history up until their removal from the discussion.

3.4. Participate in a team discussion

The **Discussion** feature also allows you to chat with all the members of a teamspace.

For more information on team discussions, please refer to Participate in the team discussion.

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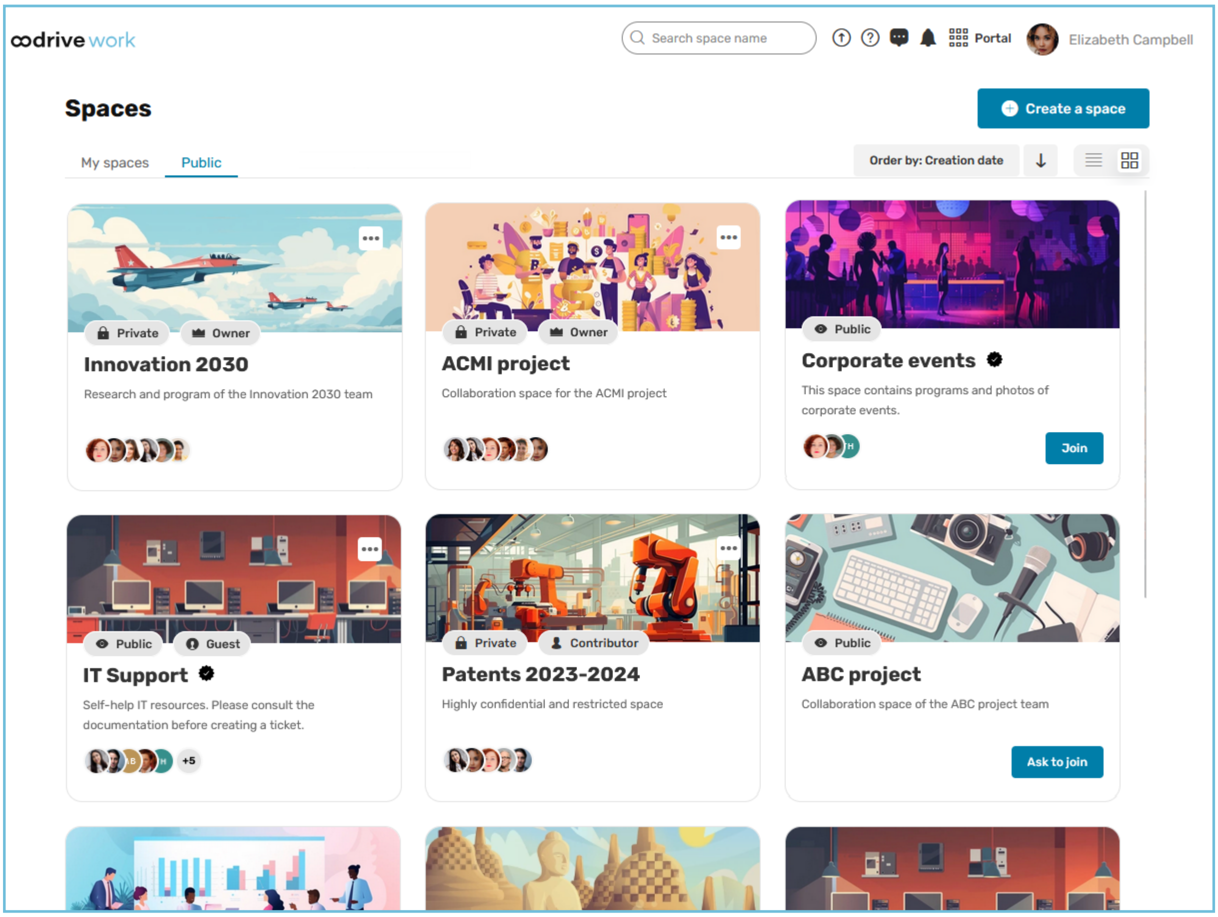
4. Collaborate with teamspaces

4.1. Introduction

Oodrive Work allows you to create collaborative spaces with multiple owners, known as team teamspaces. Teamspaces enable you to organize collaborative work around common goals and facilitate the distribution of documents to internal and external collaborators.

Each teamspace has its own storage and trash. Its members can intervene on the files it contains according to the permissions granted by their role.



Teamspace types

There are two types of teamspaces:

- **Public teamspaces**

  A public teamspace can be viewed by all the Users authenticated to the service. The Owners of the public teamspace upload documents and other content for wide circulation.

A public teamspace can be **Open to everyone** or only accessible **On request**, after validation by an Owner.

- **Private teamspaces**

  A private teamspace is a collaboration space whose existence is known only to its owners and the colleagues they have invited.

Member permissions

Each member of a teamspace is assigned a role that defines their scope of action in the teamspace. These roles are as follows: **Owner**, **Contributor** and **Guest**.

The table below details the permissions associated with each role:

<table>
<tr><th colspan="5">Permissions according to member role</th></tr>
<tr><th></th><th>Guest</th><th>Contributor</th><th>Owner</th><th>Custom*</th></tr>
<tr><td colspan="4">COLLABORATION ON FILES</td><td rowspan="10">*Has custom access permissions to folders and subfolders, set by the Owner, allowing or restricting specific actions</td></tr>
<tr><td>View a document</td><td>•</td><td>•</td><td>•</td></tr>
<tr><td>Download a document</td><td>•</td><td>•</td><td>•</td></tr>
<tr><td>Upload a document</td><td></td><td>•</td><td>•</td></tr>
<tr><td>Edit a document locally</td><td></td><td>•</td><td>•</td></tr>
<tr><td>Edit a document online</td><td></td><td>•</td><td>•</td></tr>
<tr><td>Delete a document</td><td></td><td>•</td><td>•</td></tr>
<tr><td colspan="4">SHARING</td></tr>
<tr><td>Secure shares via link or email</td><td></td><td>•</td><td>•</td></tr>
</table>

Permissions according to member role			
Manage shares		•	•
STORAGE MANAGEMENT			
Modify allocated storage			•
Restore from trash		•	•
Delete from trash			•
ACCESS MANAGEMENT			
Add a member			•
Delete a member			•
Manage member roles			•
Manage joining requests			•

Please note that some of these actions are not available on the mobile version of Oodrive Work.

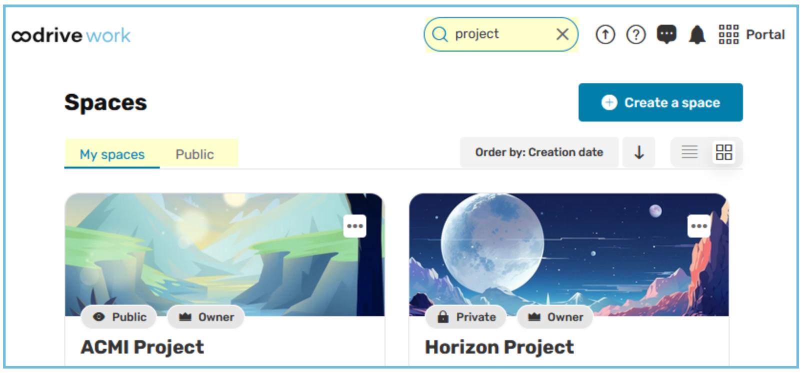
4.2. Browse teamspaces

Search for a space

From the home page of your Oodrive Work application, you can view all available teamspaces.

1. Search for a teamspace using the search bar or filter the teamspace list using the tabs along the top of the page:

    - **My spaces**: includes your personal space and all the spaces you have joined.
    - **Public**: displays all public teamspaces.



You can also sort the list of spaces by the criteria of your choice, using the **Order by** button:

- **Favorites**
- **Highlighted** (displays your organization's official teamspaces first)
- **Number of members**
- **Creation date**
- **Alphabetical order**

2. View the tile of a teamspace to see its status (public or private) as well as the role you have been granted by the Owner(s).

   As a reminder, the roles are as follows:

   - **Owner**: you have full rights to manage and contribute to a teamspace.
   - **Contributor**: you can upload to the teamspace and edit, share or download the items it contains.
   - **Guest**: you will only have consultation rights on items in the teamspace.
   - **Custom**: You will have custom access permissions for each folder, set by the Owner.

     For more information on roles, consult this summary table. For custom roles, please refer to the "Customize member access permissions" on page 50 section.

3. To access a teamspace, click on its tile. You access the teamspace and all the files it contains.

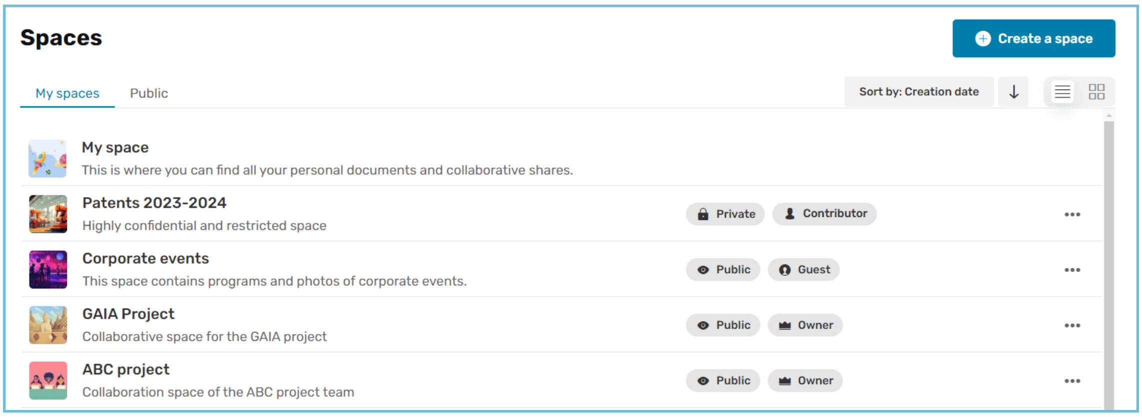
To leave a teamspace and return to the home page, go to the side menu on the left and click on **Back**.

Choose how your spaces are displayed

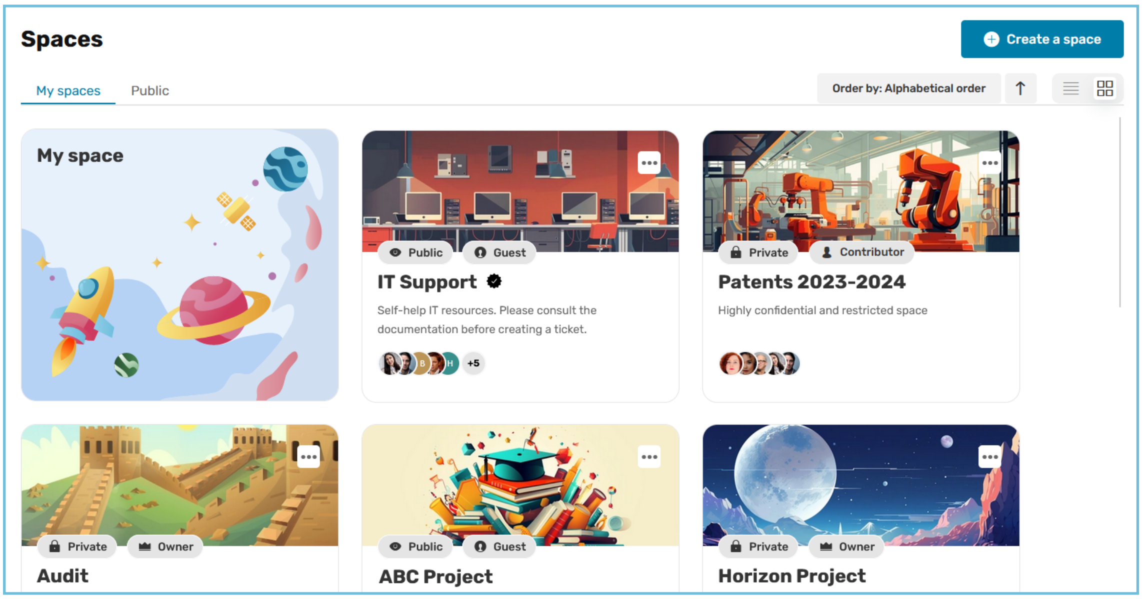
You can change the presentation of your spaces according to your viewing preferences.

To do so, click the icon **List with lines** or **List with tiles** .

List with lines



List with tiles



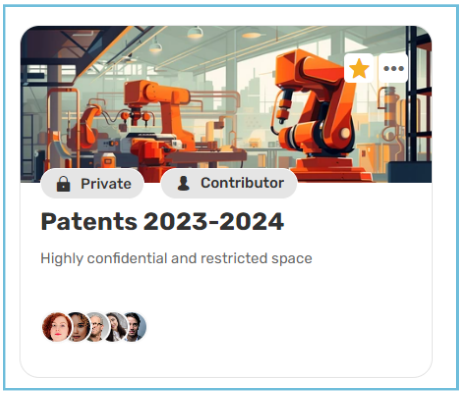
Add a teamspace to your favorites

You can add teamspaces to your favorites for quick access. Favorite teamspaces display a star on their tile.

1. From the home page of your Oodrive Work application, you can view all available teamspaces.

2. Use the search bar, filters or, sorting function to find the Teamspace you want to add to your favorites.

3. Hover over the teamspace tile and select the star to add it to your favorites.



You can remove a teamspace from your favorites at any time by deselecting the star.

Please note: If you leave a teamspace saved as a favorite, it will automatically be removed from your favorites list.

4.3. Create and manage teamspaces

Depending on the configuration made by your administrator, you may be able to create and manage new teamspaces. If you are appointed as Owner of a teamspace, you will also be able to undertake management activities.

Create a teamspace

1. From the home page of your Oodrive Work application, click **Create a space**.

2. Enter a name and a description for your teamspace, then select its visibility.

   As a reminder, the visibility options are as follows:

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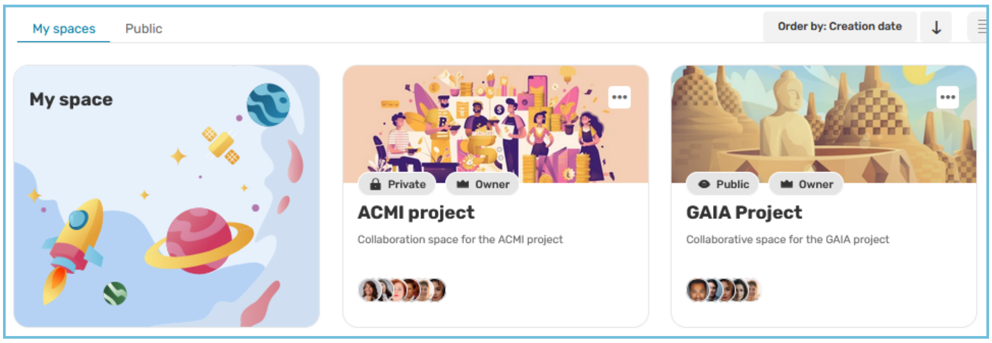
- **Public - Open to everyone** : teamspace freely accessible to Oodrive Work users, enabling content to be centralized and shared widely.
- **Public - On request** : teamspace whose access is subject to the Owners' approval. You must invite your colleagues or validate their access requests.
- **Private** : teamspace whose existence is known only to its owners and the colleagues they have invited.

If needed, you can change the visibility status of your space at a later date.

3. Click **Create space**.

Your new teamspace has been created. You can find it in the list of your teamspaces:



Activate/deactivate the team discussion

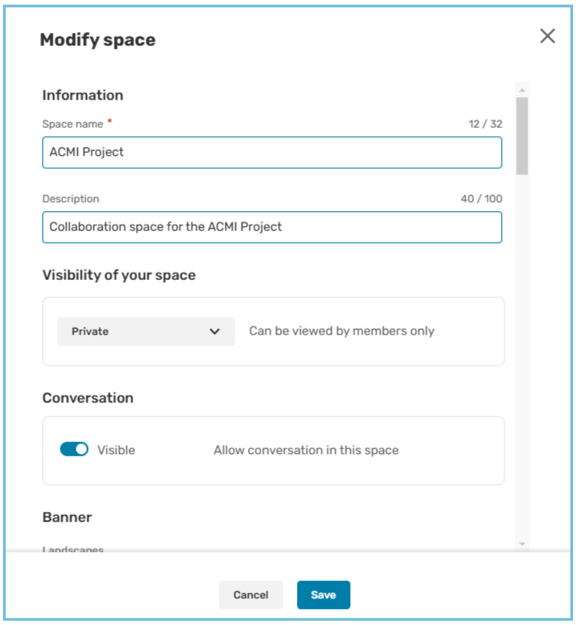
As the Owner of a teamspace, you can activate or deactivate the team discussion in your teamspace.

When activated, the team discussion is open to all teamspace members, regardless of their role. New members also have access to the conversation history.

1. From the home page of your Oodrive Work application, click on the teamspace for which you want to activate or deactivate discussion.

2. In the menu on the left, go to the teamspace tile and click on the icon **Modify space** ⚙.

3. To activate or deactivate the **Discussion** feature, click on the **Visible** toggle switch.



4. Click **Save**.

You can return to this section at any time to deactivate or reactivate the team discussion.

Please note: If you deactivate the **Discussion** feature and reactivate it at a later date, the message history will still be available.

Modify the storage allocated to a teamspace

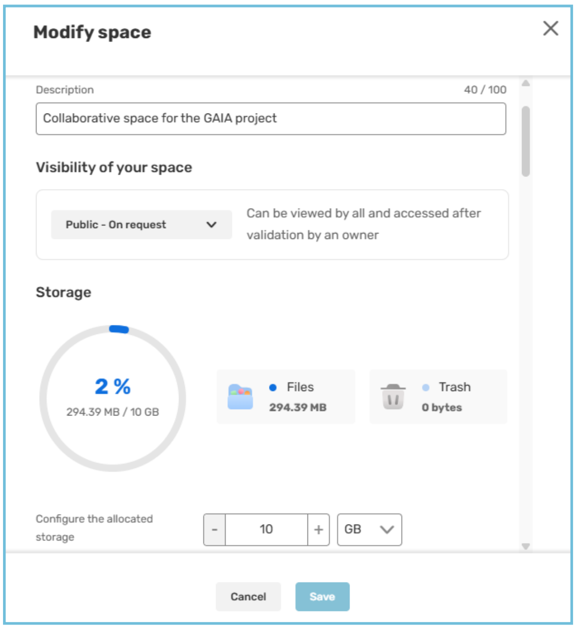
As the Owner of a teamspace, you can adjust the storage volume allocated to your teamspace, within the limits set by your administrator.

1. From the home page of your Oodrive Work application, click on the teamspace for which you want to manage storage.

2. In the menu on the left, go to the teamspace tile and click on the icon **Modify space** ⚙.

3. In the **Configure the allocated storage** field, enter a value, then click on the drop-down menu to select the size unit:

    - Megabyte (MB)
    - Gigabyte (GB)
    - Terabyte (TB)



4. Click **Save**.

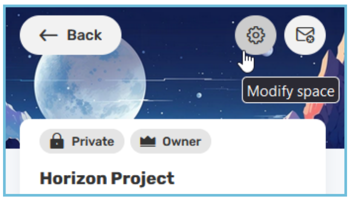
You can return to this section at any time to modify your teamspace storage according to your needs.

Modify a teamspace

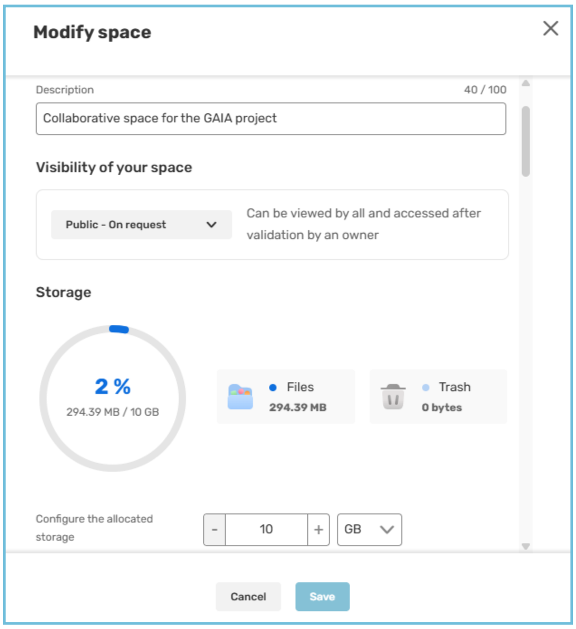
You can modify and reconfigure a teamspace for which you are an Owner.

1. From the home page of your Work application, click the teamspace you want to modify.

2. In the menu on the left, go to the teamspace tile and click on the icon **Modify space** ⚙.



3. Rename the teamspace and/or modify its description.



4. Change the way users can join your space by selecting a new visibility status: **Public - Open to everyone**, **Public - On request**, **Private**.

5. Enable **Conversation** by activating the **Visible** toggle switch.

6. Modify the storage allocated to your teamspace by entering a value and selecting the size unit:

   - Megabyte (MB)
   - Gigabyte (GB)
   - Terabyte (TB)

7. If you want to change the teamspace illustration, select an image in the list of available options.

8. When you have finished, click **Save**.

Manage teamspace members

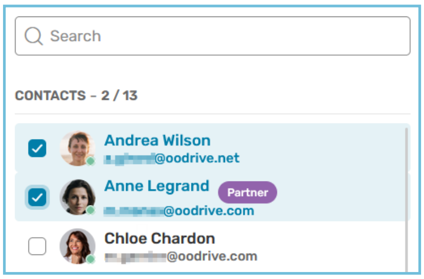
Add members and define their permissions

1. From the home page of your Oodrive Work application, click on the teamspace for which you want to manage members.

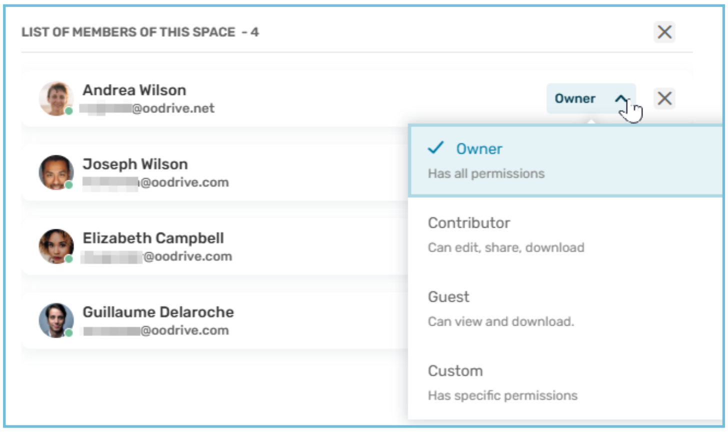
2. In the navigation panel, click **Members**.

3. Click on **Add members**.

4. Using the address book, select the internal and external collaborators you want to add to your teamspace.



5. In the list of teamspace members, select the role you want to assign to each individual.



As a reminder, the available roles are as follows:

- An **Owner** has full rights to manage and contribute to the teamspace.
- A **Contributor** can upload to the teamspace and edit, share or download the items it contains.
- A **Guest** can only view and download.
- A **Custom** role has custom access permissions for each folder, set by the Owner.

For more information on roles, consult this summary table. For custom roles, please refer to the "Customize member access permissions" on page 50 section.

Please note: collaborators known as Partners (account without a license) may not become Owners.

6. When you have finished, click **Invite**.

Approve or reject joining requests

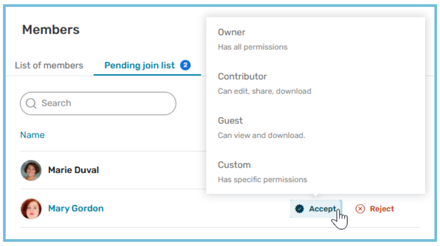
If you are the Owner of a public teamspace with on-request access, you will need to approve or reject joining requests made by your colleagues.

1. From the home page of your Oodrive Work application, click on the teamspace for which you want to manage members.

2. In the navigation panel, click **Members**.

3. Go to the **Pending join list** tab and do either of the following:

   - **To reject a joining request**, click **Reject**.
   - **To approve the joining request of a colleague**, click **Accept** and select the role you want to assign to them.



You can use the search bar along the top of the tab to find a specific access request.

Modify members role

1. From the home page of your Oodrive Work application, click on the teamspace for which you want to manage members.

2. In the navigation panel, click **Members** then the **List of members** tab.

3. Browse the list of teamspace members and select the member whose role you wish to change.

You can also search for a specific member using the search bar, or sort the list of members by **Name**, **Email**, or **Role** by clicking on the column headings.

4. Select the new role you wish to assign to the collaborator.

   As a reminder, the available roles are as follows:

   - An **Owner** have full rights to manage and contribute to the teamspace.
   - A **Contributor** can upload to the teamspace and edit, share or download the items it contains.
   - A **Guest** can only view and download.
   - A **Custom** role has custom access permissions for each folder, set by the Owner.

     For more information on roles, consult this summary table. For custom roles, please refer to the "Customize member access permissions" on page 50 section.

   Please note:

   - Collaborators known as Partners (account without a license) may not become Owners.
   - You cannot modify the role of an Owner nor remove them from the teamspace.

Customize member access permissions

As the teamspace Owner, you can create a Custom role to tailor your members' access permissions to the content in your teamspace. This Custom role allows you to define a more granular level of control by assigning specific permissions to each folder or subfolder. Depending on the permissions assigned, members may or may not be able to perform specific actions on the content.

You can create a Custom role at different stages of a member's lifecycle in the teamspace:

- When adding a member
- When approving a request to add a member
- When modifying the role of an existing member

Regardless of the path, the Custom role configuration window is the same.

Set access permissions for a Custom role

1. From the drop-down menu, select the **Custom** role.

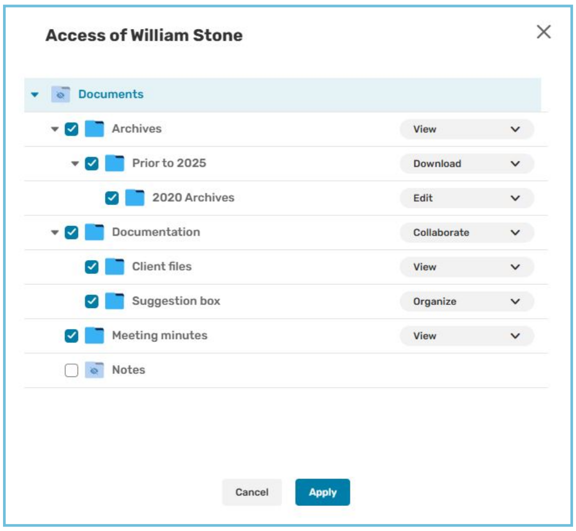
2. The file manager of your teamspace is displayed.

   Only the folders and subfolders within the teamspace are visible. Files located at the root of the teamspace are not displayed in this window.

   Please note: Files located at the root of the teamspace are not visible to members with a Custom role.

3. Select the folder(s) and subfolder(s) the member should have access to.

4. For each selected folder, assign the appropriate access permission according to your needs.



As a reminder, the available access permissions are as follows:

Access permissions	Available actions for the Custom role
View	view only.
Download	view and download.
Edit	view, download, upload and edit.
Organize	view, download, upload, edit and delete.
Collaborate	view, download, upload, edit, delete and share.

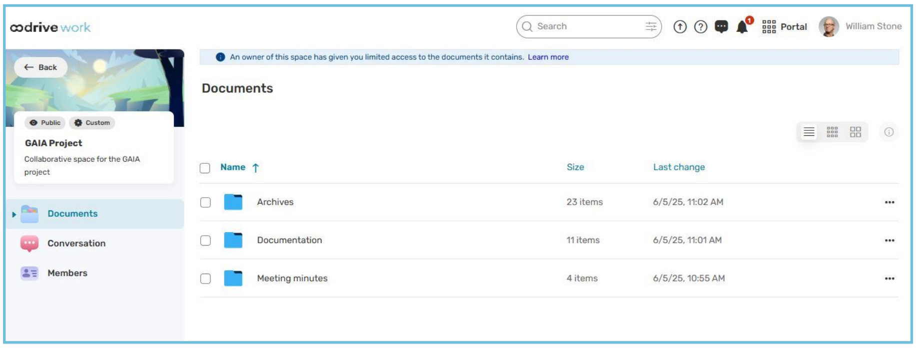
Please note: If you select a parent folder, its subfolders will automatically be visible with the default **View** permission applied. Any change to the parent folder's access permissions will automatically be applied to its subfolders. However, specific access permissions can still be defined for each subfolder individually if needed.

5. Folders that are not selected will not be visible to members with the Custom role. Hidden folders are marked with a crossed-out eye icon.

View for a member with a Custom role

- A member with a Custom role has a tailored view of teamspace content based on the access permissions granted to them.

  They do not have access to the activity summary, sent shares, or the trash, to ensure they cannot view content for which they do not have the necessary permissions.
- If an item is shared in a team discussion but the Custom role member cannot access it, it means they do not have the required access permissions to view that content.
- An information banner is displayed in the member's space, indicating that the teamspace Owner has restricted their access to content.



  The member must contact the Owner if they wish to request additional access.
- The folders selected by the Owner are displayed side by side at the root level, even if they are located at different depths in the actual structure.

  However, if a parent folder has been selected, the full structure within that folder is preserved.
- A member with a Custom role cannot create or import files or folders at the root of the teamspace. However, if they have the appropriate access permissions, they can perform these actions within the folders shared with them.

Export member access permissions

As the teamspace Owner, you can export the access permissions of your teamspace members as an XLSX or CSV file. This provides a clear overview of who can view, edit, or manage content.

This file helps you better manage member access permissions, avoid mistakes (such as unintentionally granting overly broad access), and maintain control over the shared information.

Below is a description of the columns included in the access permissions file:

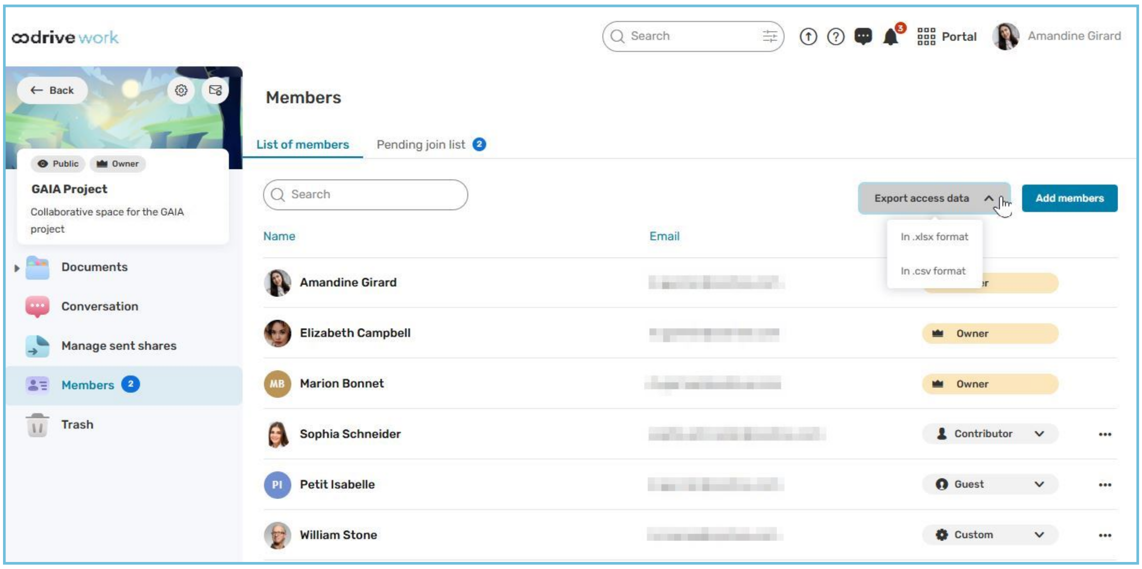
Column title	Description
MemberUUID	Member's unique identifier
Lastname	Member's last name
Firstname	Member's first name
Email	Member's email address
Role	Member's role within the teamspace
Access	Path to a folder in the teamspace the member has access to: • The symbol **/** indicates that the member has access to the entire content of the teamspace. • A full path (e.g., /Documents/Projects/2025) means the member only has access to that specific folder and its contents.
view	The member can only view the folder contents if the box is selected.
download	The member can view and download the folder contents if the box is selected.
edit	The member can view, download, upload, and edit the folder contents if the box is selected.
organize	The member can view, download, upload, edit, and delete the folder contents if the box is selected.
collaborate	The member can view, download, upload, edit, delete, and share the folder contents if the box is selected.

Please note: A member with a Custom role may appear multiple times in the access permissions table: one row is displayed for each folder they have access to, along with the specific access permission granted for that folder.

1. From the home page of your Oodrive Work application, click on the teamspace for which you want to manage members.

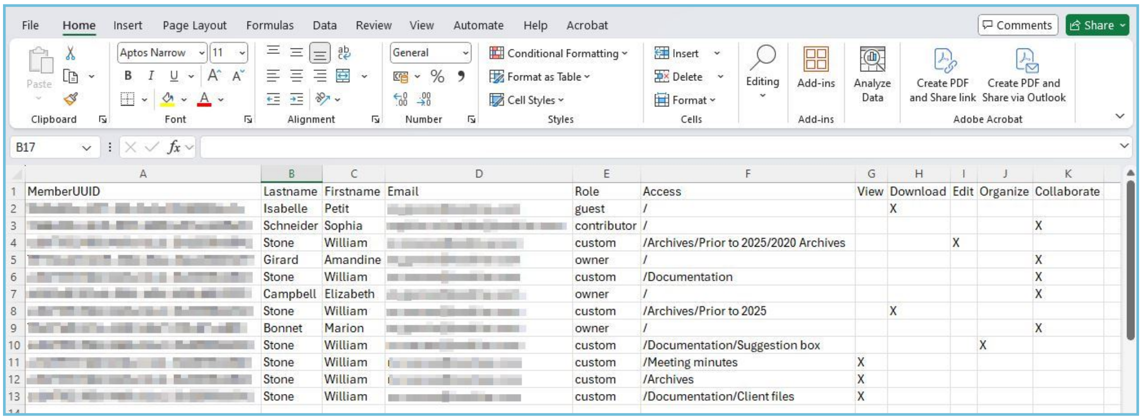
2. In the navigation panel, click **Members**.

3. Click **Export access data** and 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.



Delete members

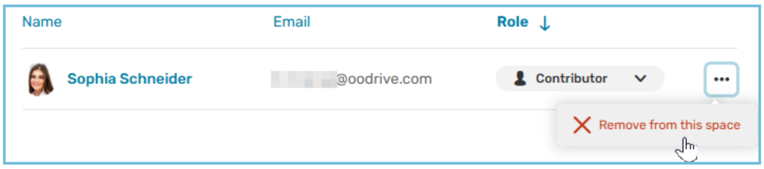
1. From the home page of your Oodrive Work application, click on the teamspace for which you want to manage members.

2. In the navigation panel, click **Members** then the **List of members** tab.

3. Browse the list of teamspace members and select the member you wish to remove from the space.

   You can also search for a specific member using the search bar, or sort the list of members by **Name**, **Email**, or **Role** by clicking on the column headings.

4. Click on the three dots next to the collaborator's name you want to delete, then click **Remove from this space**.



Please note: You cannot change an Owner's role or remove them from the space. If you wish an Owner to leave the space, they must do so themselves. You can also request it from your administrator.

4.4. Deactivate or delete a teamspace

Only an Administrator can deactivate or delete a teamspace.

For reasons of security and data confidentiality, an Administrator cannot view the name or content of teamspaces created on Oodrive Work.

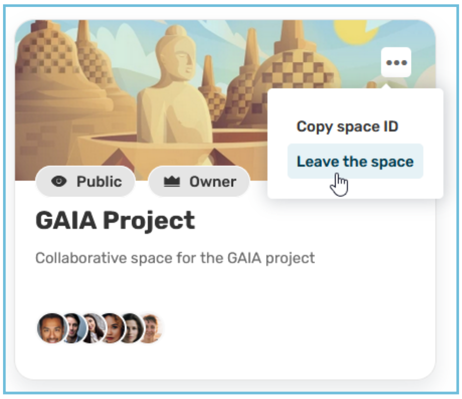
Therefore, if you wish to deactivate or delete a teamspace you own, you will need to provide the Administrator with your teamspace's unique identifier.

To retrieve your teamspace's unique identifier :

1. Go to the home page of your Oodrive Work application.

2. Click on the three small dots on the tile of the teamspace you want to archive or delete.

3. Click **Copy space ID**.



4. Provide the ID to your Administrator so that they may deactivate or delete the teamspace.

4.5. Join a teamspace

Depending on the configuration made by your administrator, you may view and join teamspaces you are not yet a member of.

Join a teamspace that is open to everyone

Some public teamspaces can be accessed freely.

1. From the home page of your Oodrive Work application, click **Public** to display all public teamspaces.

2. Identify the teamspace you want to join and click **Ask to join**.

You automatically join the teamspace with the Guest role. If necessary, a teamspace Owner can attribute another role to you.

Join a teamspace on request

Some public teamspaces are accessible only with the permission of the Owners. You must make a request to join them.

1. From the home page of your Oodrive Work application, click **Public** to display all public teamspaces.

2. Identify the teamspace you want to join and click **Ask to join**.

You must now wait for an Owner to accept your request. Once your request has been approved, you will be able to access the teamspace with the permissions defined for you by the Owner.

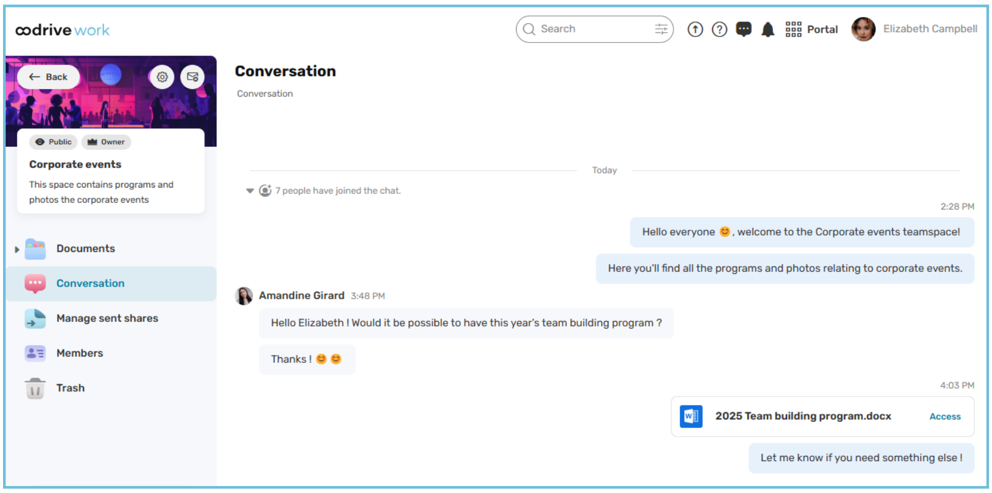
Join a private teamspace

The existence of a private teamspace is known only to its Owners and the individuals they have invited. You can only join a private teamspace if one of the Owners has chosen to invite you.

4.6. Participate in the team discussion

Please note: The discussion feature is not available in a SecNumCloud-qualified Private Cloud environment.

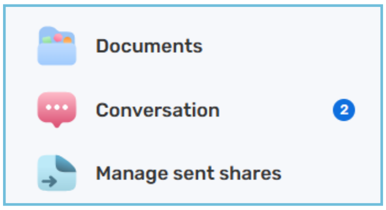
You can chat with members of your teamspace using the **Discussion** feature.



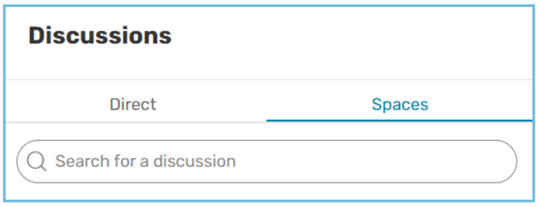
Access a team discussion

You can access a team discussion:

- **From a teamspace**, by clicking the **Conversation** menu.



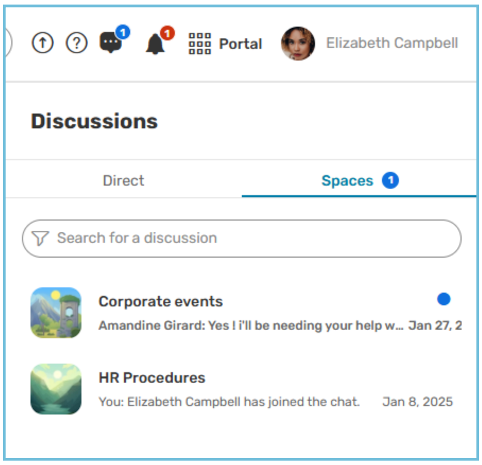
- **From the home page**, by clicking the **Discussions** icon, then the **Spaces** tab.



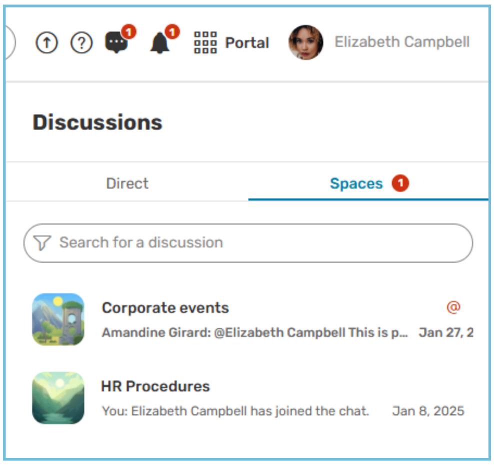
If you want to find a specific discussion, enter the teamspace name in the search bar.

Discussion notifications

When you receive a message, a blue dot appears on the Chat icon to notify you. When you have been tagged in a message, the dot becomes red and an **@** symbol appears on the tile of the concerned discussion:



New message



New message you're tagged in

Chat in a teamspace

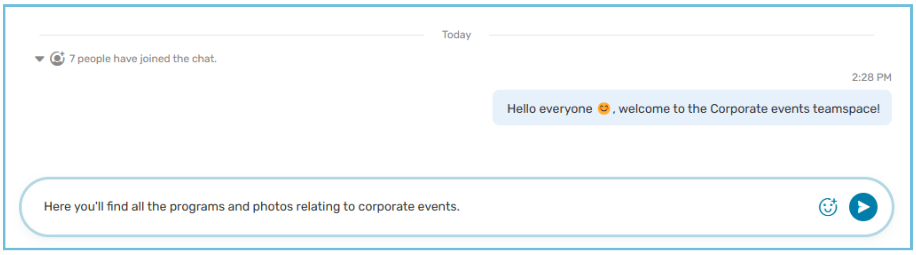
When enabled for a teamspace, the **Discussion** feature allows you to chat with all teamspace members. Over the course of your discussions, you may:

- Insert emoticons in your messages
- Delete a message
- Tag other members
- Reply to a specific message
- React to a message
- Edit a message
- Share documents in the team discussion

Send a message

1. From the home page of your Oodrive Work application, click the teamspace in which you want to chat.
2. In the navigation panel, click **Discussion**.
3. Enter your message.

Insert emoticons: click the icon and select the emoticon of your choice.



Tag a colleague: enter **@** and select a colleague in the list. You can also tag all members by selecting **@Everyone**.

4. When your message is ready, click or press the **Enter** key.

Edit a message

You can edit a message you have already sent.

1. Hover over the message and click the **Edit** icon .
2. Edit your message, then confirm by clicking the **Edit** icon .

   To discard your changes, click the **Cancel** icon ✕ then on **Delete**.

Messages that have been edited are labelled as such.

Delete a message

Any member may delete their own messages. If you are the Owner of the teamspace, you can also moderate the conversation by deleting messages of other members if necessary.

1. Hover over the message and click the **Delete** icon .
2. Click **Delete** again to confirm.

React to a message

1. Hover over the message and click the **React** icon .
2. In the pop-up window, select an emoticon.

Reply to a message

1. Hover over the message and click the **Reply** icon ↰ .
2. Enter your reply and click ▶ or press the **Enter** key.

Share a file in the team discussion

1. From your teamspace file manager, select the document(s) you want to share.
2. Click the **Share** button along the top of the page and select **In the discussion**.
3. If you want to, you can also add a message to your share.
4. When you have finished, click **Send**.

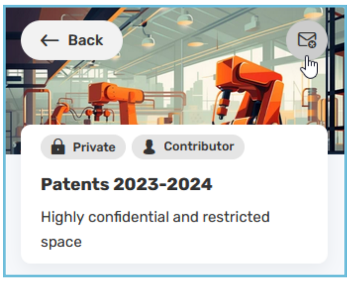
The document is added to the team discussion. Your colleagues will be able to access the file location by clicking **Access** or directly open the document by double-clicking its name.

4.7. Set up an activity summary

You can subscribe to an activity summary for each teamspace you are a part of, regardless of whether you are a Guest, Member or Owner.

This allows you to track activities in real time and keep up to date with the latest actions of your collaborators, improving transparency in your project management.

1. From the home page of your Oodrive Work application, click on the teamspace for which you want to receive an activity summary.
2. In the menu on the left, go to the teamspace tile and click on the icon **Manage my activity summary** .



3. Activate the feature, then use the drop-down menu to select the sending frequency:
   - **Immediately**
   - **Every hour**
   - **Every day**
   - **Every week**
   - **Every month**
4. When you have finished, click **Save**.

The activity summary will be sent to you by e-mail at the frequency you have chosen.

You can return at any time to the **Manage my activity summary** menu to deactivate the summary or change its frequency.

4.8. Manage documents in a teamspace

Each member of a teamspace can intervene on the files it contains according to the rights granted by their profile (Owner, Member or Guest).

As an **Owner** or **Member** of a teamspace, you can interact with its documents as you would in **My space**. As a **Guest**, you only have permission to view and download documents.

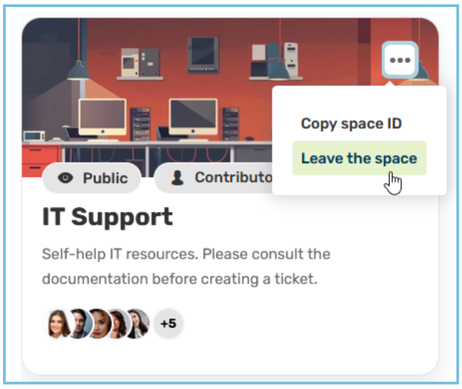
For further information, please consult the following resources:

- Document management: Managing your sensitive documents.
- Rights granted by profile within a teamspace: Permissions summary.

4.9. Leave a teamspace

You can leave a teamspace at any time.

From the home page of your Oodrive Work application, click on the three dots on the tile of the teamspace you want to leave and select **Leave the space**.



Attention: If you are the last Owner of a teamspace, you must first designate a new Owner before being able to leave.

5. Have a PDF document signed

The Oodrive Work 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.

5.1. Send a PDF document for signature

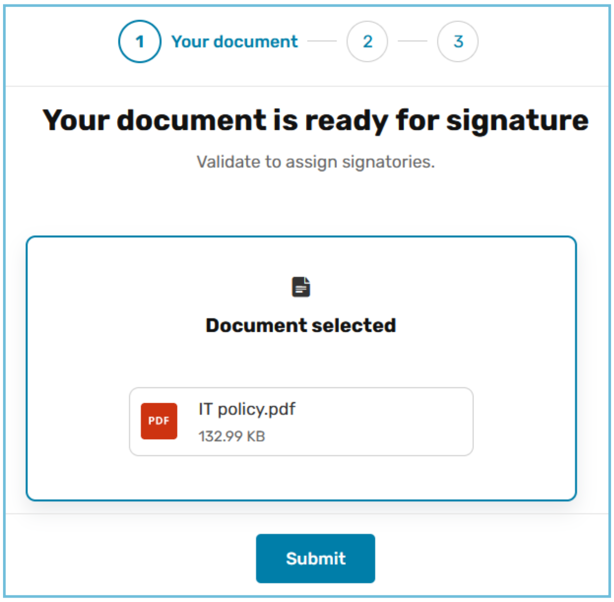
Step 1 : Select the document to be signed

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.



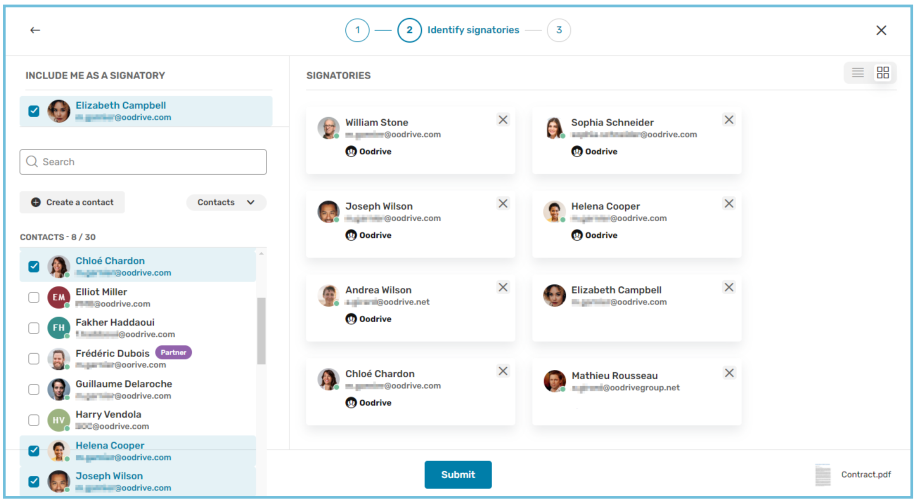
4. If you have selected several documents for signature, you will be asked if you wish to merge them. Choose an option.
   - **Keep documents separate**: each document is signed independently of the others.
   - **Merge documents**: the documents you have selected are merged into a single document requiring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

   You can also add yourself as a signatory by checking your name in the **Include me as a signatory** section.

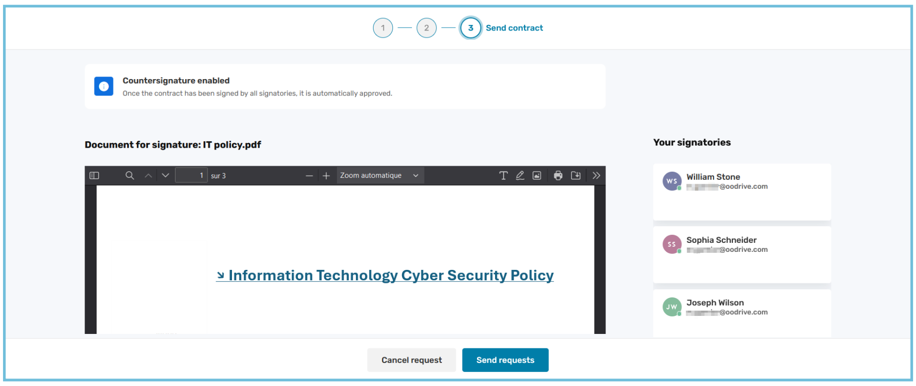


   Tip: Depending on the configuration made by your administrator, you may be able to create a contact on the fly using the **Create a contact** button. Enter your contact's surname, first name and e-mail address and click **Create**. The contact in question will be added to your address book and automatically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

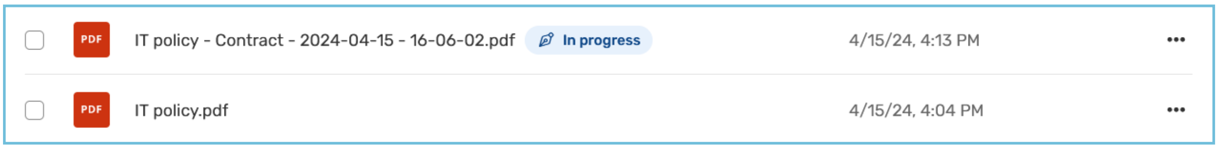
2. When you have finished, click **Submit** to go to the next step.

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:



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

5.2. Manage signature requests

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

Monitor the signature process

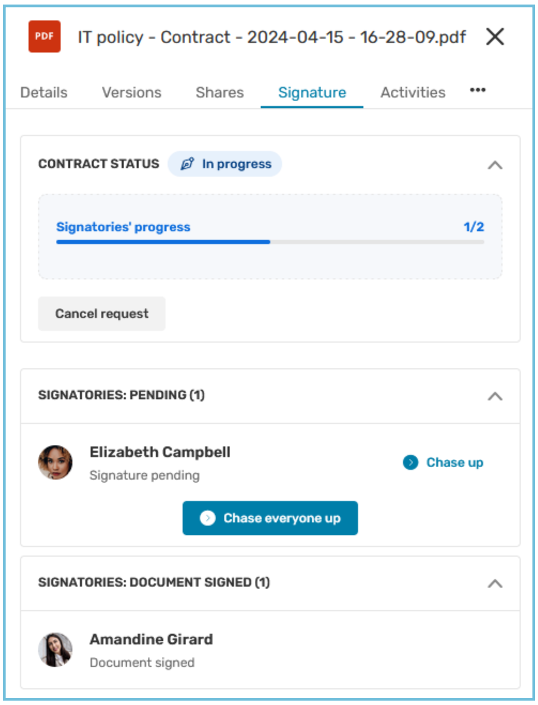
Once your document has been sent to the signatories, a label appears on your document to indicate the status of the signature:

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.

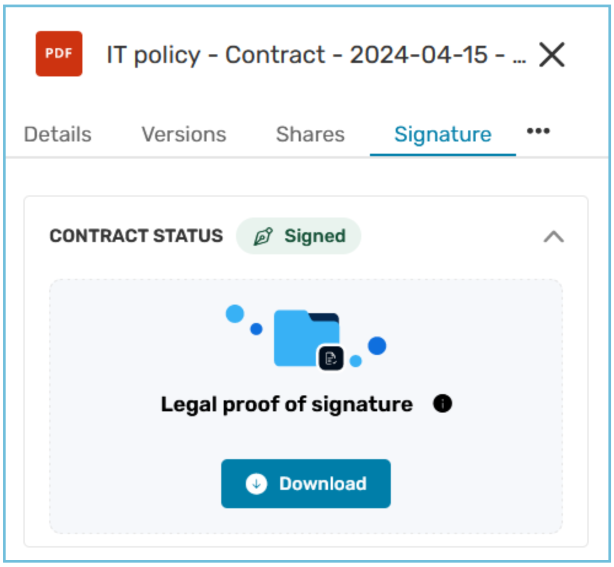
To download the proof file:

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**.



6. Create a new share

6.1. Introduction to share types

Oodrive Work 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**, **drop boxes** and **shares via link**. These types of shares enable you to transfer or collect files without your collaborators needing 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.

Only unauthenticated shares are available within teamspaces.

Please note: When performing unauthenticated shares (via email or drop box), creating a contact on the fly depends on the settings configured by the administrator of your workspace.

6.2. Create a share via link

Share your files using a hyperlink

1. Browse the file manager and select the item(s) you want to share.

2. Click the **Share** button along the top of the page and select **Create link**.

3. Fill in the title of the share if desired, then change the sharing options according to your preferences:

   ☑ Share end date
   ☑ End-of-share alert
   ☑ Password
   ☑ Send me an activity summary
   ☑ Apply watermark

4. Once you have finished, click **Create link**.

5. 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.

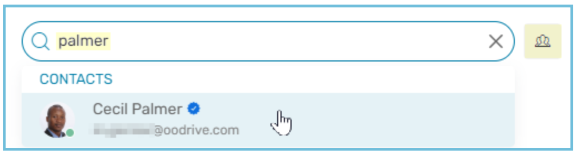
6.3. Create a share via email

Share your files via a hyperlink embedded in an email.

1. Browse the file manager and select the item(s) you want to share.

2. Click the **Share** button along the top of the page and select **Via email**.

3. 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.

4. Select the share permissions you want to assign to your recipients, then click **Next**.

5. If desired, fill in the email subject and message.

6. Edit the sharing options according to your preferences:

- ☑ Share end date
- ☑ Delete files when share ends
- ☑ Password
- ☑ Apply watermark
- ☑ End-of-share alert
- ☑ Max download limit
- ☑ Send me an activity summary
- ☑ 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.

7. 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.

6.4. Create a collaborative share

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

1. Create a new folder by clicking **Create**, then **Create a folder**.

2. Add all the items you'd like to share to the new folder.

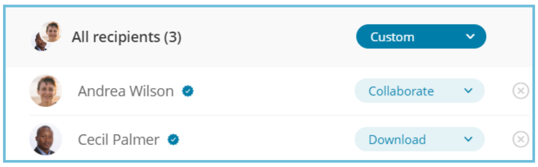
3. Select the folder.

4. Click **Share**, then select **Create a collaborative share**.

5. 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.

6. 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.

7. If needed, fill in the subject line and content of the email that will alert recipients to the new collaborative share.

8. 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

9. When you are finished, click **Share**.

6.5. Create a drop box

A drop box is a type of share that allows recipients to upload files to your workspace.

By default, recipients of a drop box can:

- Upload documents
- Download and view documents they have uploaded themselves as well as those uploaded by the owner of the drop box

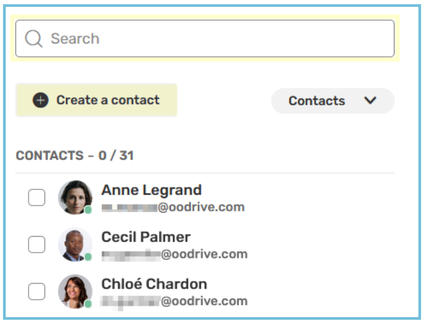
A recipient cannot see what other recipients have uploaded unless the owner of the drop box chooses to make files visible between recipients.

Create a new drop box

1. Create a new drop folder by clicking **Create**, then **Create drop box**.

2. Enter the name of your drop box and click **Next**.

3. Select one or more recipients from the address book and click **Add**.



   Tip: You can also create a new contact by clicking **Create a contact** and filling out the form.

4. If needed, fill in the subject line and content of the email that will inform recipients about the availability of a new drop box.

5. Modify the sharing options according to your preferences.

   ☑ Share end date
   ☑ Password and/or OTP
   ☑ Send me an activity summary
   ☑ Make recipients visible to one another
   ☑ Make files visible between recipients

Please note: the sharing options available and the possibility of modifying them may depend on the configuration made by your administrator.

6. When you have finished, click **Submit**.

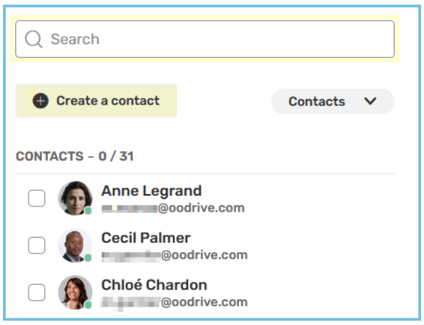
Your recipients will receive an e-mail with a link to the drop box.

Convert a folder into a drop box

1. Browse the file manager and select the folder you want to convert into a drop box.

2. Click **Share** along the top of the page and select **Convert to drop box**.

3. In the creation menu, add one or more recipients from the address book and click **Add**.



Tip: You can also create a new contact by clicking **Create a contact** and filling out the form.

4. If needed, fill in the subject line and content of the email that will inform recipients about the availability of a new drop box.

5. Modify the sharing options according to your preferences.

☑ Share end date
☑ Password and/or OTP
☑ Send me an activity summary
☑ Make recipients visible to one another
☑ Make files visible between recipients

Please note: the sharing options available and the possibility of modifying them may depend on the configuration made by your administrator.

6. When you have finished, click **Submit**.

Your recipients will receive an e-mail with a link to the drop box.

6.6. 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. Go to the **My Space** section of your Oodrive Work application.

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

3. 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.

4. Select **Share via link** and change the sharing options as desired.

5. Click **Share via link**.

6. Click **Copy link**, then forward the sharing link to your recipients via your chosen method.

Quick share via email

1. Go to the **My space** section of your Oodrive Work application.

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

3. 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.

4. Select **Share via email**.

5. 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.

6. If needed, enter the contents of the email message.

7. Modify the sharing options according to your preferences:

- ☑ Share end date
- ☑ Delete files when share ends
- ☑ Password
- ☑ Apply watermark
- ☑ End-of-share alert
- ☑ Max download limit
- ☑ Send me an activity summary
- ☑ Make recipients visible to one another

8. 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.

7. 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

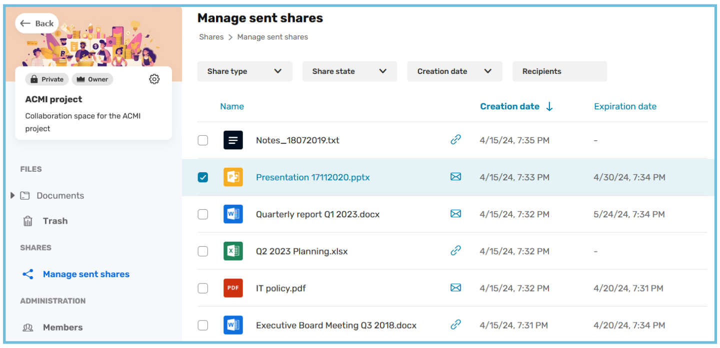
Please note: The available actions when modifying a share may depend on the type of share (via link, via email or collaborative).

7.1. Modify your shares

Modify shares individually

Modify recipients and sharing options

1. From the navigation panel, access sent shares:
   - **From My space:** click **Share management > Shares sent**.
   - **From a teamspace:** click **Manage sent shares**.



   You view all the shares created in your teampsace or personal space. In **My space**, this includes 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-enbled and made available to your colleagues once again at a later date.

1. From the navigation panel, access sent shares:
   - **From My space:** click **Share management > Shares sent**.
   - **From a teamspace:** click **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

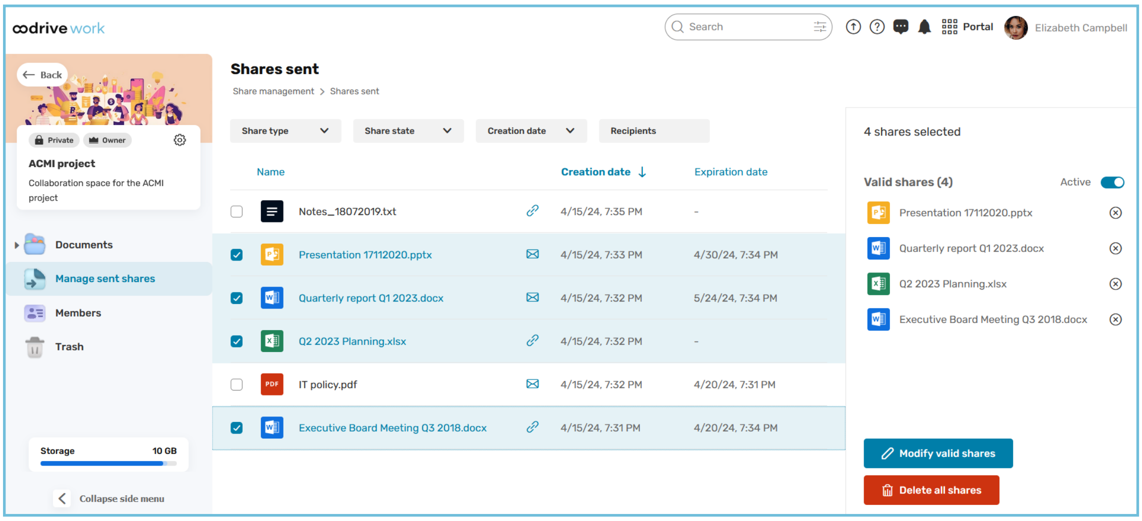
When the toggle switch is blue, the share is active

Modify shares in bulk

You can perform bulk actions on your shares.

The following actions can be carried out 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. From the navigation panel, access sent shares:
   - **From My space:** click **Share management > Shares sent**.
   - **From a teamspace:** click **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 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**.

7.2. Manage access to your collaborative shares

Manage your collaborative shares from the **Share management > Collaborative access** section. You can:

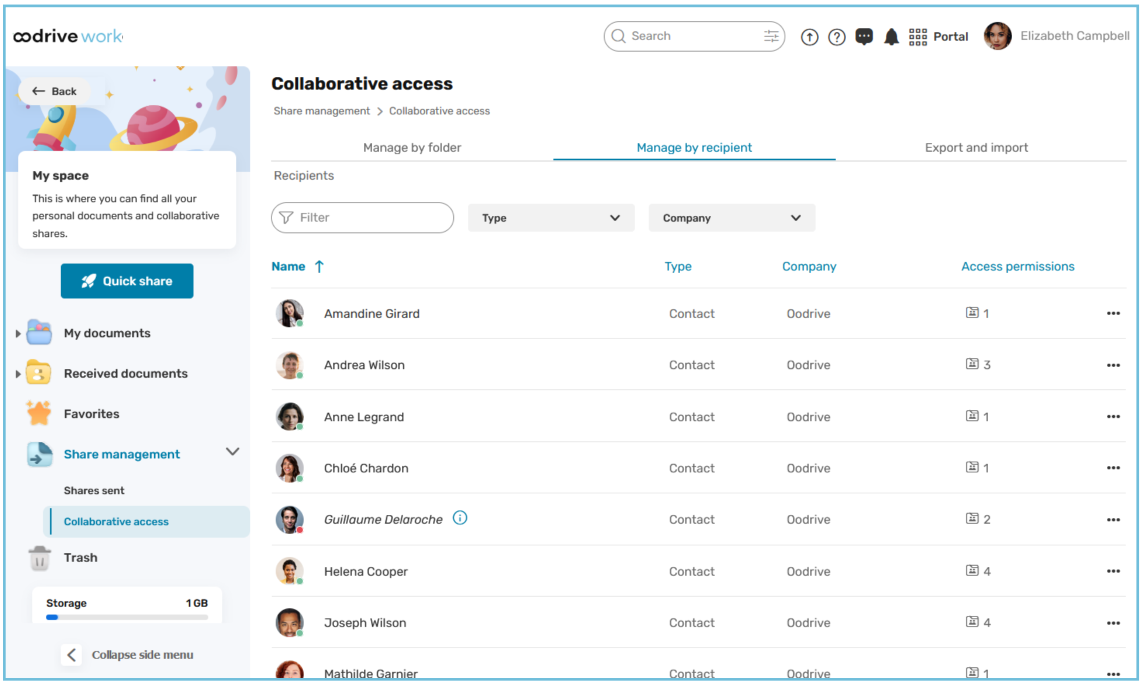
- Consult an overview of your collaborative shares arranged either by recipients or by collaborative folders.
- Make individual changes to recipient access permissions.
- Make batch changes to recipient access permissions via an XLSX or CSV file.

Update user access permissions individually

Manage your collaborative shares by recipient

The **Manage by recipient** tab 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. Go to **My space**.
3. In the navigation panel on the left, select the **Share management > Collaborative access** section, then go to the **Manage by recipient** tab.



4. In the **Manage by recipient** tab, 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.

5. Click the recipient whose access permissions you want to modify.

6. 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.

7. 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**.

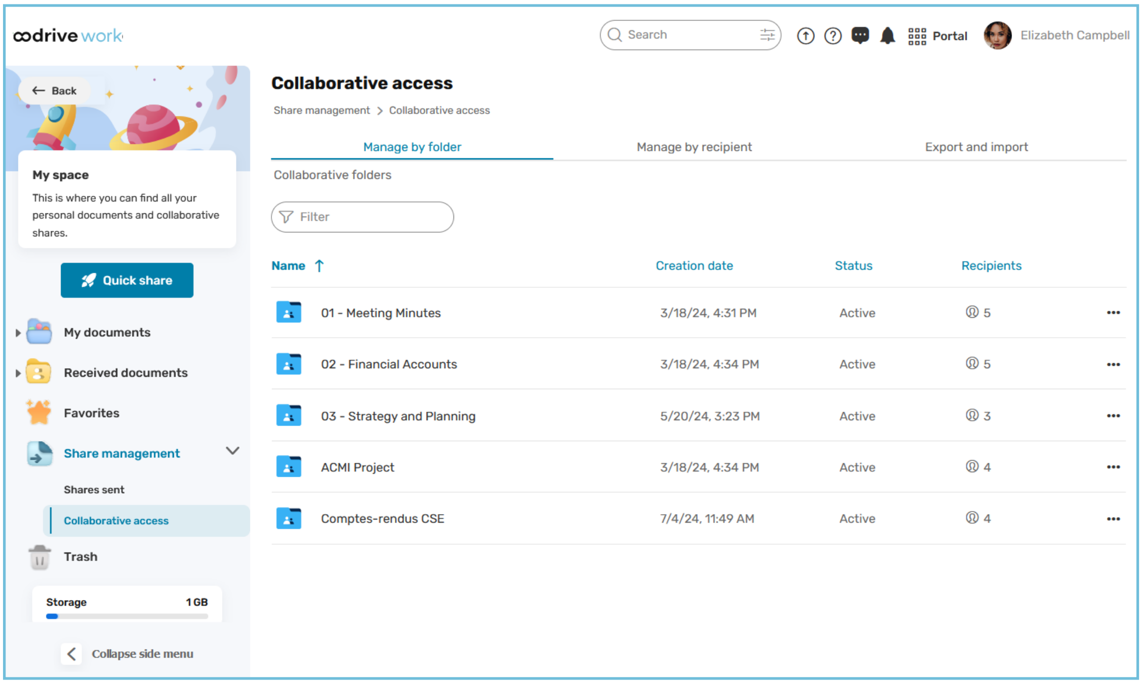
Manage your collaborative shares by collaborative folder

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

1. Log in to your workspace and access your collaborative application.

2. Go to **My space**.

3. In the navigation panel, select the **Share management > Collaborative access** section, then go to the **Manage by folder** tab.



4. In the **Manage by folder** tab, 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.

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

6. 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.

7. 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 **Share management > Collaborative 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.

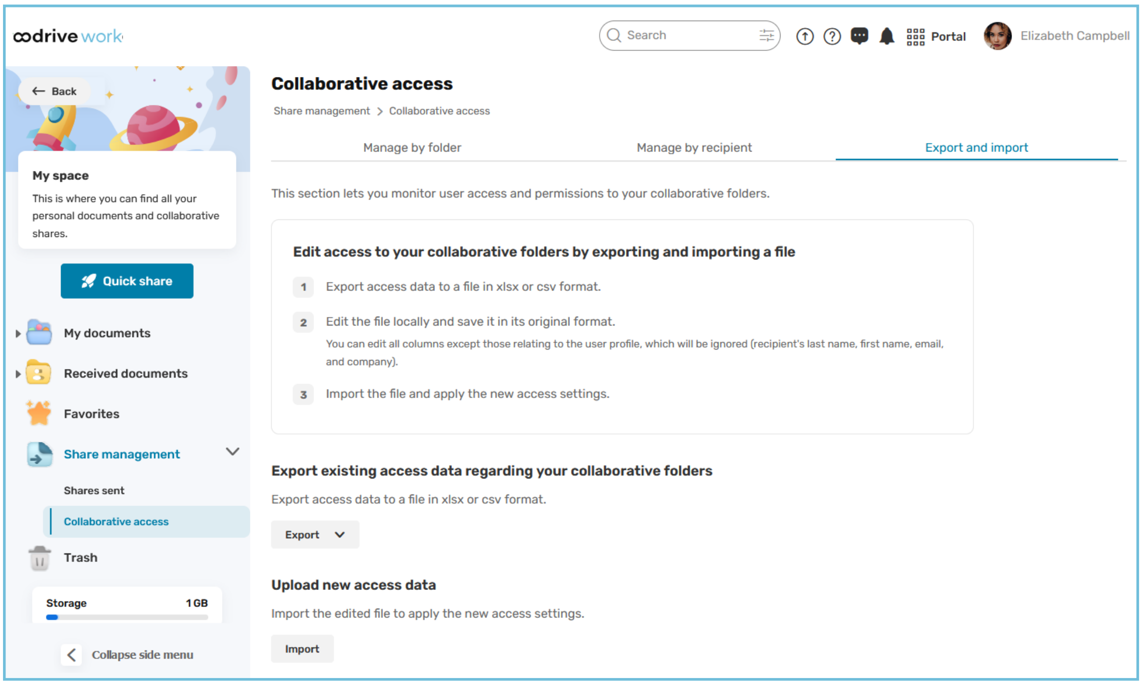
Below, you will find a description of the columns in the access permissions file:

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. Go to **My space**.
3. In the navigation panel on the left, select the **Share management > Collaborative access** section then go to the **Export and import** tab.

4. In the **Export existing access data regarding your collaborative folders** section, click **Export** and select a file format to download (XLSX or CSV).



The download will start automatically in your browser.

5. 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.

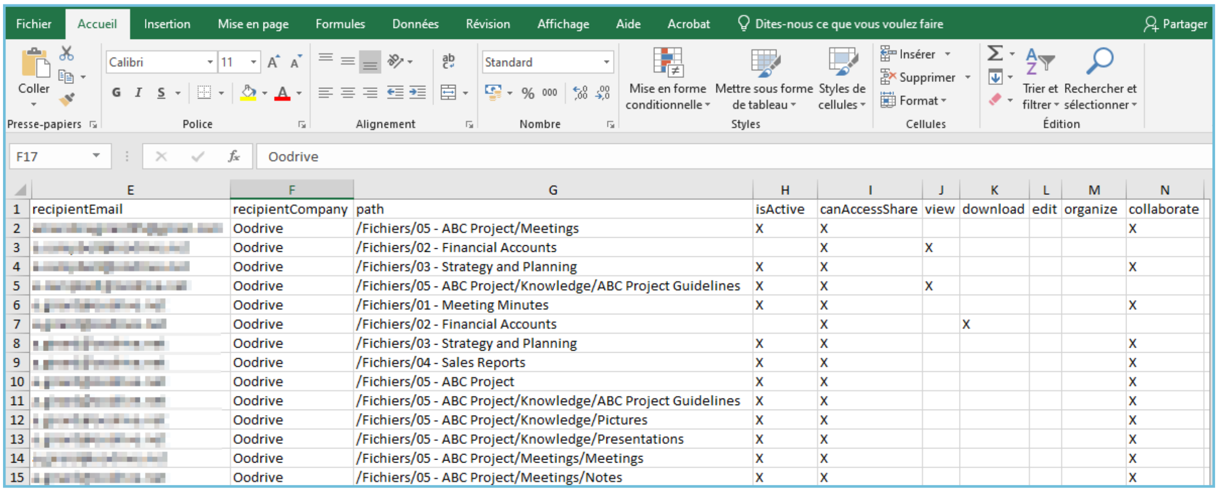
    - **To modify a user's permissions:** move "**X**" to the column which corresponds to the permission set that you want to assign:
        - **view** to view
        - **download** to view and download
        - **edit** to view, download, upload, and edit

   - **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.

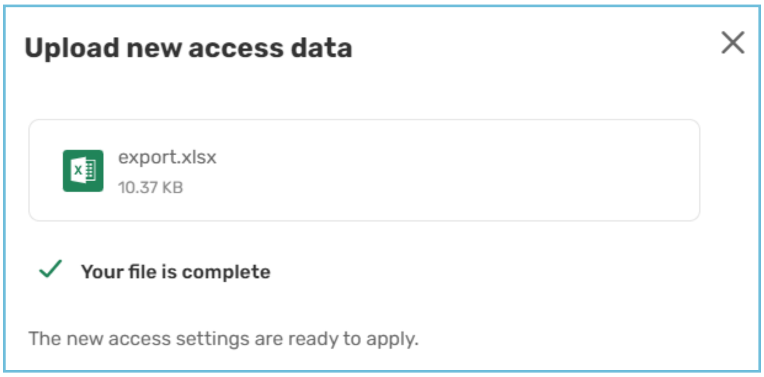


	E	F	G	H	I	J	K	L	M	N
1	recipientEmail	recipientCompany	path	isActive	canAccessShare	view	download	edit	organize	collaborate
2	[illegible]	Oodrive	/Fichiers/05 - ABC Project/Meetings	X	X					X
3	[illegible]	Oodrive	/Fichiers/02 - Financial Accounts		X	X				
4	[illegible]	Oodrive	/Fichiers/03 - Strategy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

7.3. 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. From the navigation panel, access sent shares:
   - **From My space:** click **Share management > Shares sent**.
   - **From a teamspace:** click **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.

7.4. 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. From the navigation panel, access sent shares:
    - **From My space:** click **Share management > Shares sent**.
    - **From a teamspace:** click **Manage sent shares**.
2. Identify the share you'd like to delete.
3. From the **Details** tab on the right, click **Delete**.
4. To permanently delete the share, click **Delete**.

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

8. Track your shares

To help you maintain control over what you share, Oodrive Work 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.

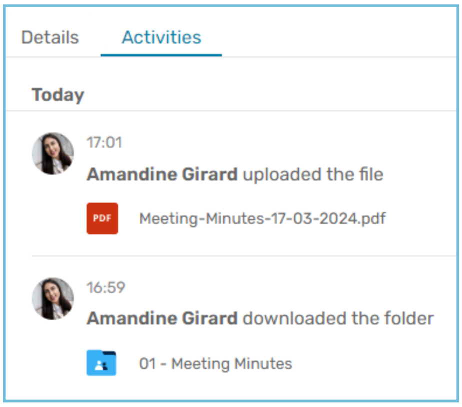
8.1. Track activity for a share

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. From the navigation panel, access sent shares:
   - **From My space:** click **Share management > Shares sent**.
   - **From a teamspace:** click **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.

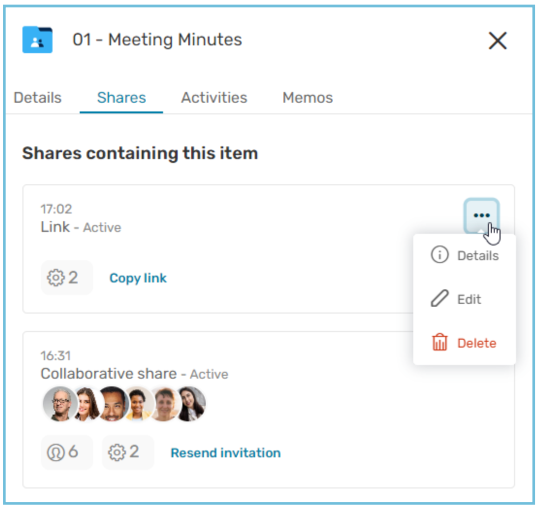


Please note: You can also track activity for a specific file in the **Documents / My documents** section. To do so, select an item, open the information panel and go to the **Activities** tab.

8.2. 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 / My 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).



8.3. 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

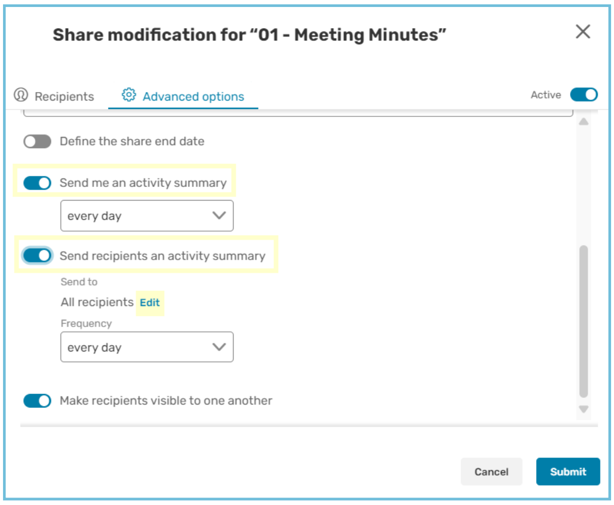
Activities such as downloading and viewing an item are not featured in the activity summary, but you can view them in the **Activities** tab of each individual item.

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 **My space**.
3. Go to the **Share management > Shares sent** section and select the collaborative share you want to modify.
4. Click **Edit**.
5. In the new window, click the **Advanced options** tab.
6. 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
7. To manage recipient notifications, enable the **Send recipients an activity summary** toggle switch and select recipients as well as the sending frequency.
8. 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.

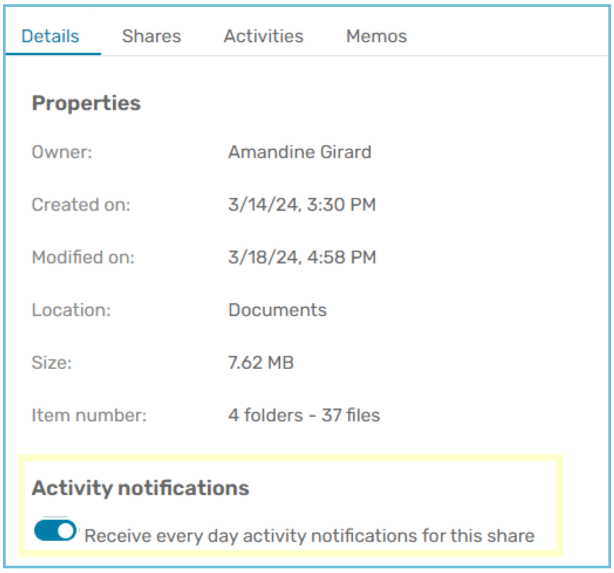
As the recipient of a collaborative share

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. Go to **My space**.
3. Select the collaborative share you want to manage in the **Received documents** section. If the share details are not displayed, click to open the information panel.
4. 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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