



# Panzura for Outlook Add-In

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Table of Contents

**Panzura for Outlook Add-In ..... 3**

    Logging in to the Outlook add-in ..... 3

        Attaching a file from Panzura Edge to an Outlook email ..... 4

        Attaching a large file to an email ..... 8

        Uploading an Outlook attachment to Panzura Edge ..... 9

        Automating attachment upload ..... 10

**Restrictions on Filenames and File Types in Panzura Edge ..... 13**

**Troubleshooting ..... 14**

    I am not able to see the Panzura for Outlook Add-In inside Outlook. .... 14

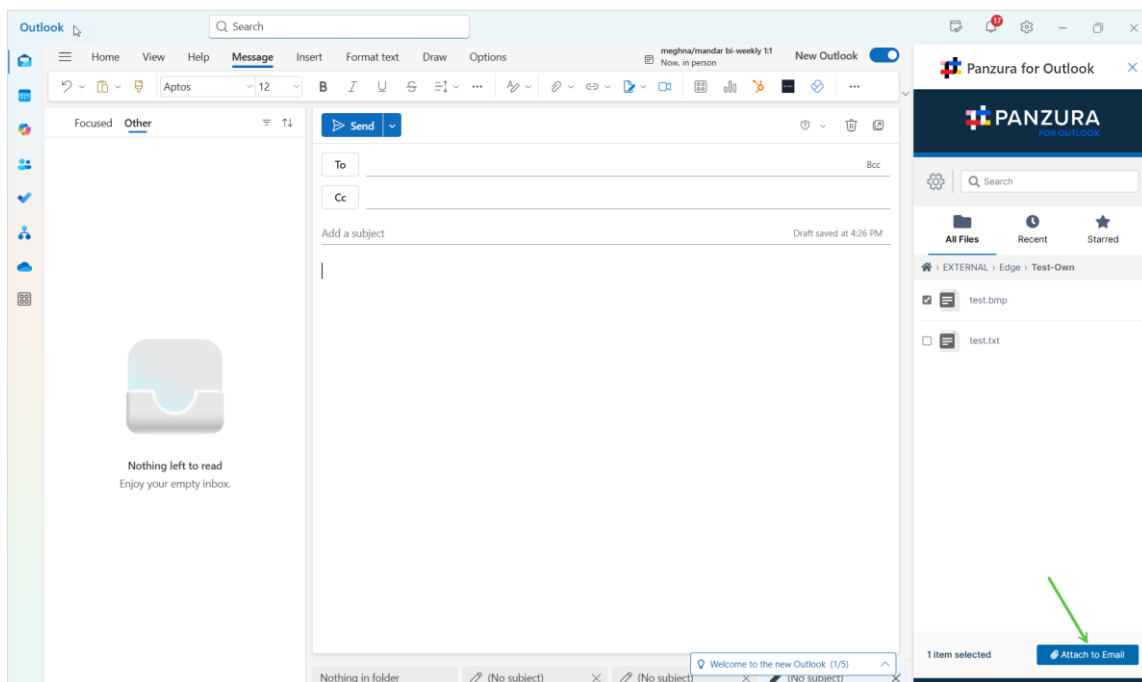
    Log in Using Two-Factor Authentication ..... 14

# Panzura for Outlook Add-In

The Panzura for Outlook Add-In enables you to save Outlook email attachments to Panzura Edge and attach Panzura Edge files to Outlook emails as attachments or share links.

The Panzura for Outlook Add-In is available in:

- Windows and macOS
- the classic and the new Outlook interfaces
- Outlook desktop and Outlook Web

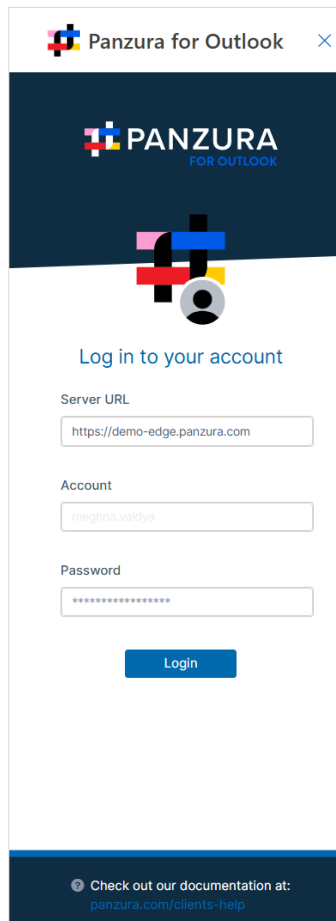


The Panzura for Outlook Add-In can only be opened from within an email, either one you are composing or one you have received. The add-in appears as a side panel to the right of the email.

## Logging in to the Outlook add-in

When you open the Panzura for Outlook Add-In, if you are not already logged in to Panzura Edge, you can log in through the add-in.

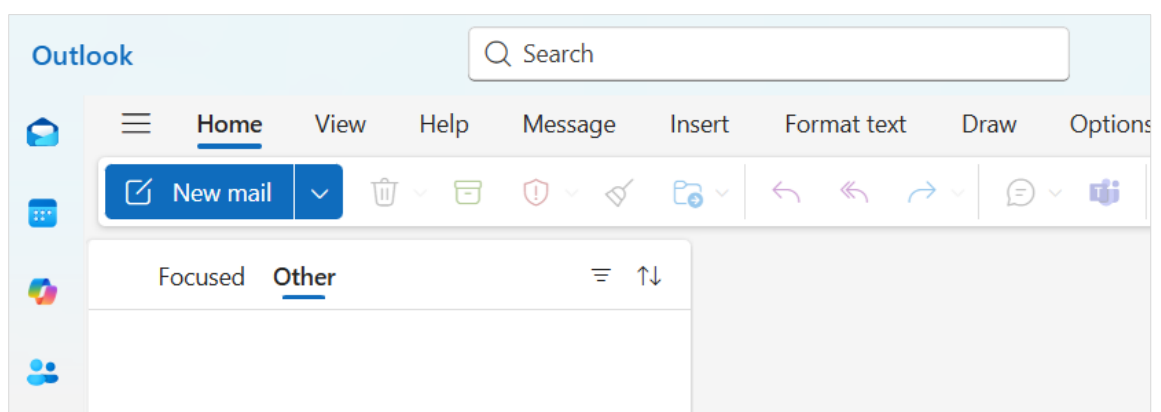
You can log in by entering your Panzura Edge server address, username, and password. If 2FA is enabled, you are prompted to [log in using 2FA](#).



**Note:** SSO login is not yet supported in the Panzura for Outlook Add-In.

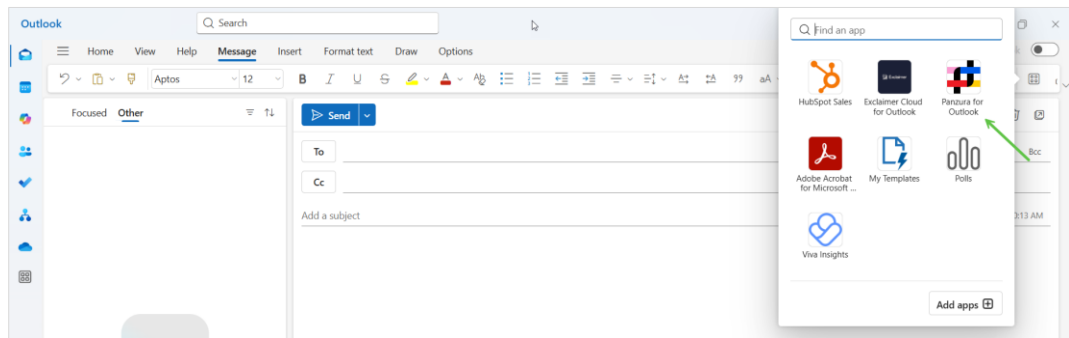
## Attaching a file from Panzura Edge to an Outlook email

1. Open Outlook.
2. Click Home in the menu bar, and then click **New mail**.



An empty email opens.

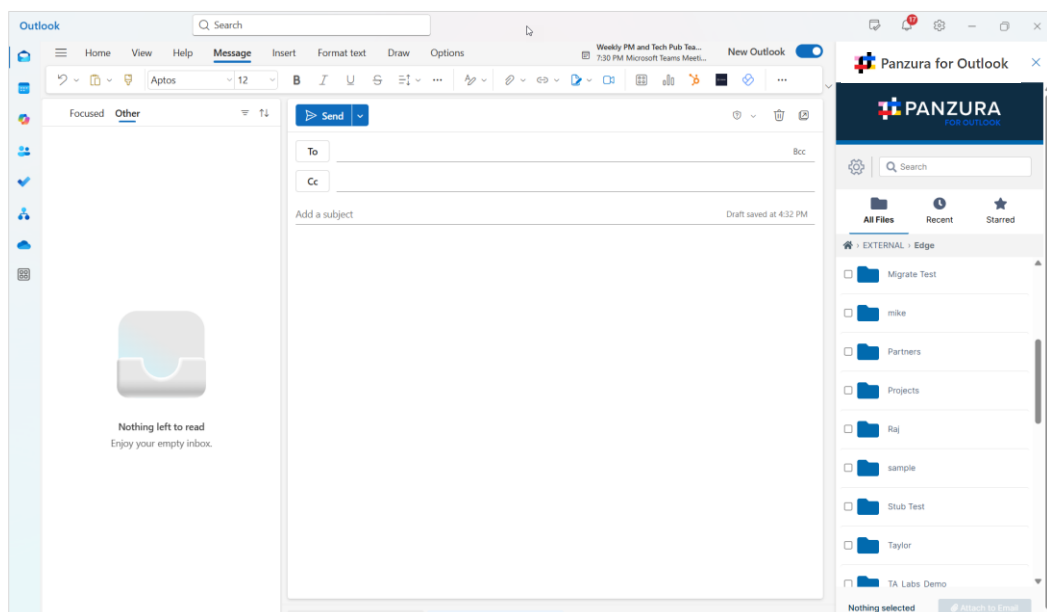
3. Click the Apps icon (grid of squares), which appears when **Message** is selected in the menu bar and choose **Panzura for Outlook**.



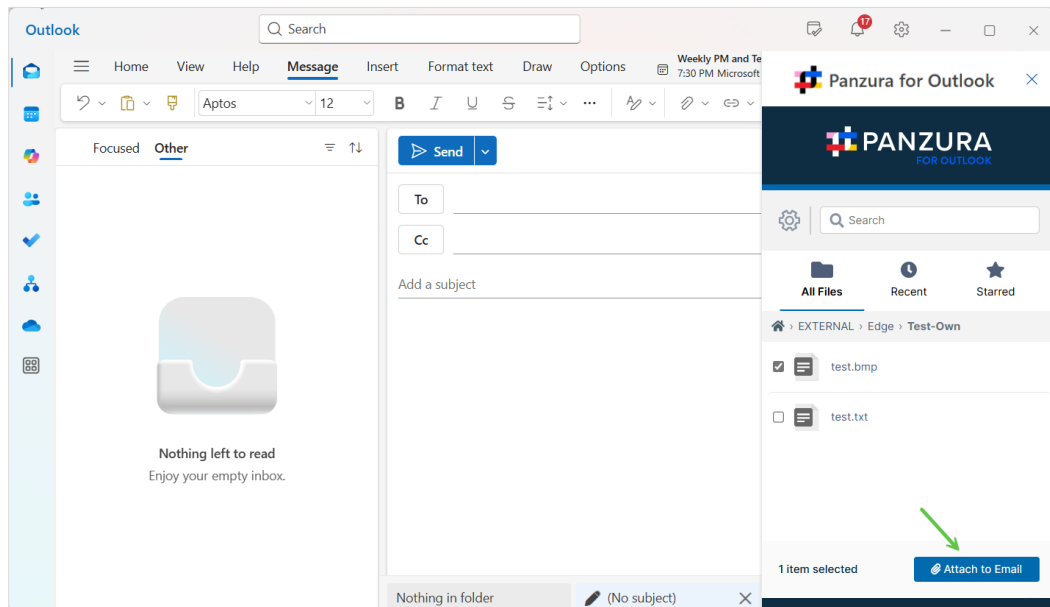
The Panzura for Outlook Add-In opens as a panel to the right of the screen.

4. If you are not already logged in to Panzura Edge, log in.

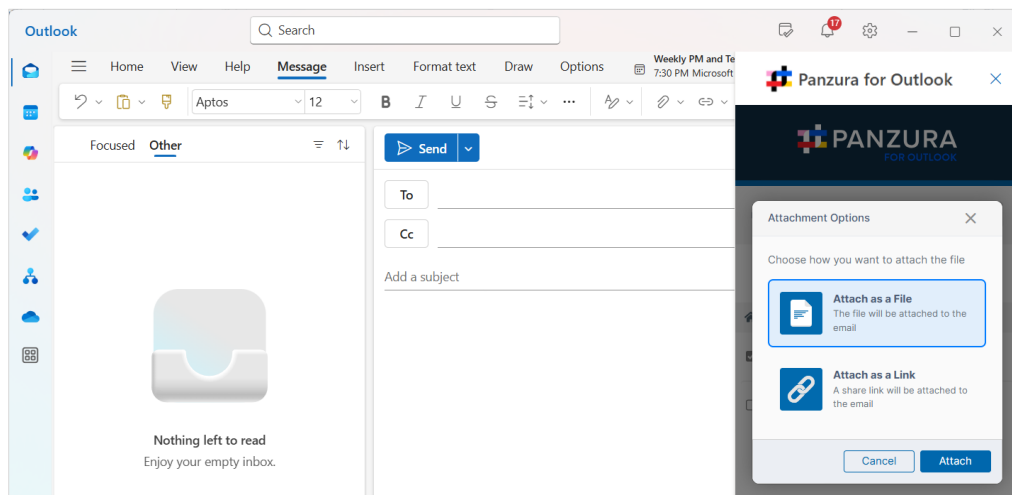
All of your Panzura Edge folders appear in the Outlook add-in.



5. Navigate to the file that you want to add to the email and select it.
  - Click Attach to Email.



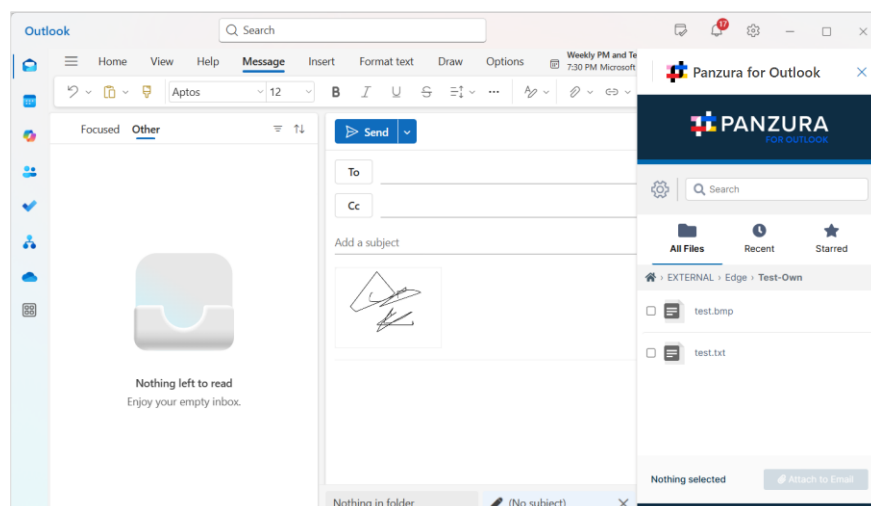
An Attachment Options dialog box opens.



Choose Attach as a File or Attach as a Link and click Attach.

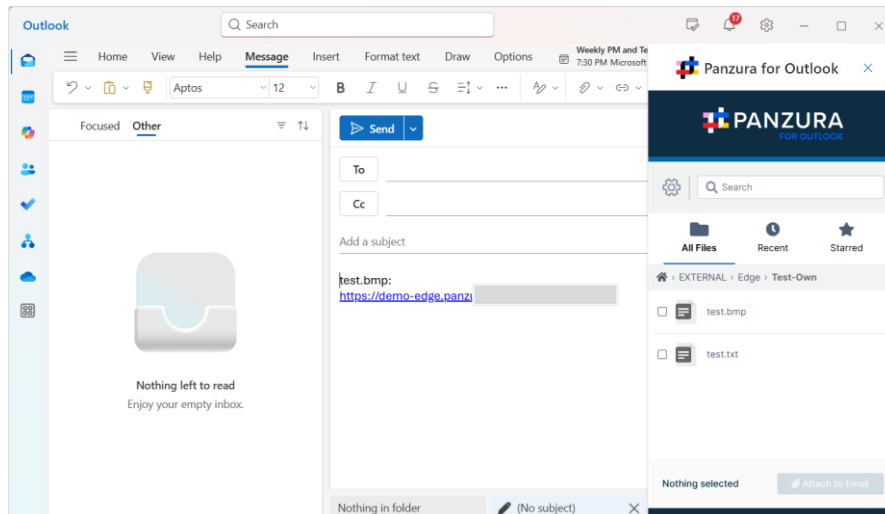
- If you attach as a file:

The file appears as an attachment in the email:



- If you attach as a link:

A share link appears in the email:

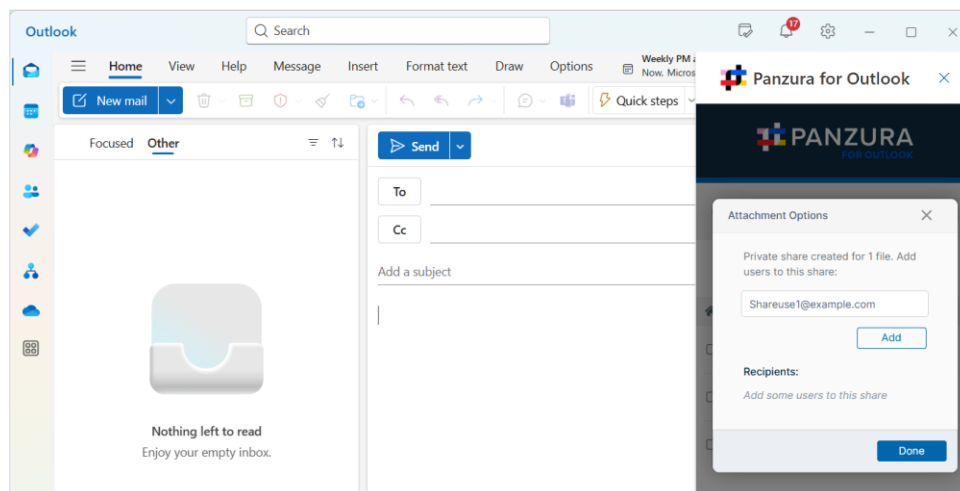


The type of share link created is the default share type in your Panzura Edge system.

**Note:** Once you insert the share link, the share is created in Panzura Edge, even if you do not send the email or if you delete the link.

6. If the default share type in your system is private, you are prompted to choose users to share with.

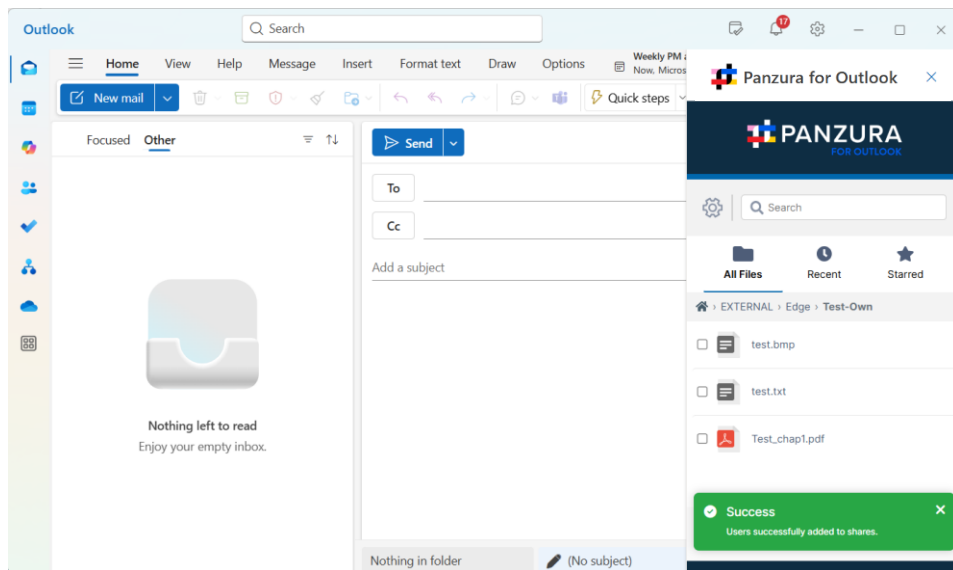
The email recipient is not automatically added to the share; if you want to add them, add them now.



Add any number of users to the share and click **Done**.

A confirmation that the users have been added to the share appears.

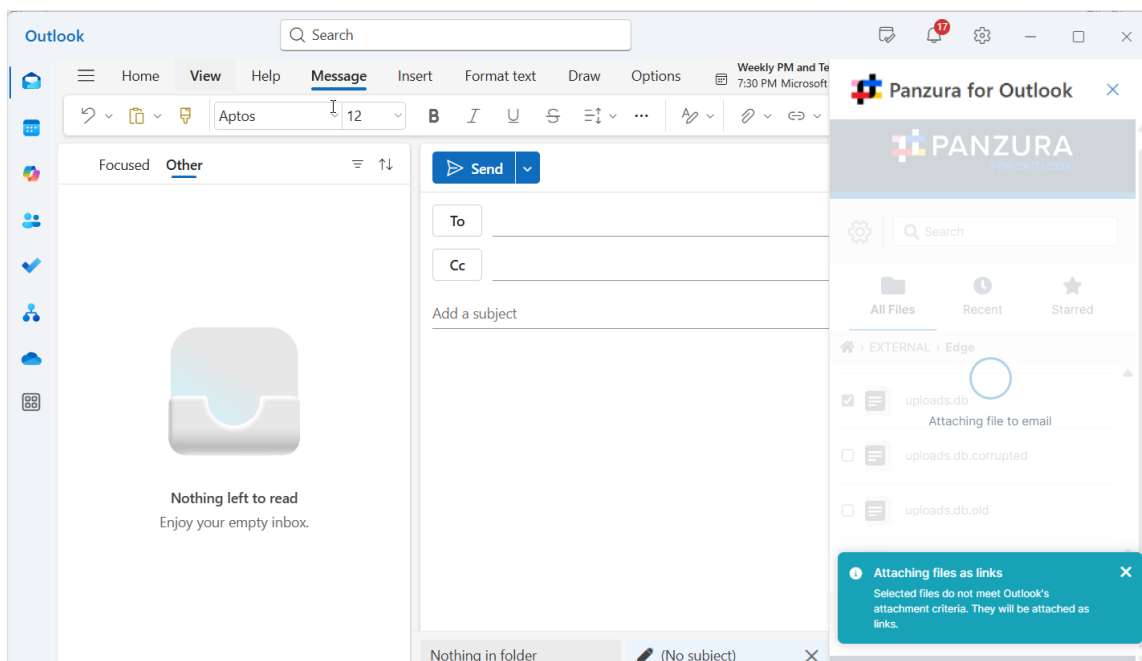
The share gives the user view and download permissions and sets the other share options to the defaults for your system. Later, you can open the Panzura Edge user portal and change the share options.



If the default share type in your system is Public, the link is added directly to the email, and you are not prompted to do anything else.

## Attaching a large file to an email

The limit on the size of an email in Outlook is 20 MB. If including an attachment would cause the email to be greater than 20 MB, the Panzura for Outlook Add-In attaches it as a share link instead, and it is added as a share in Panzura Edge.



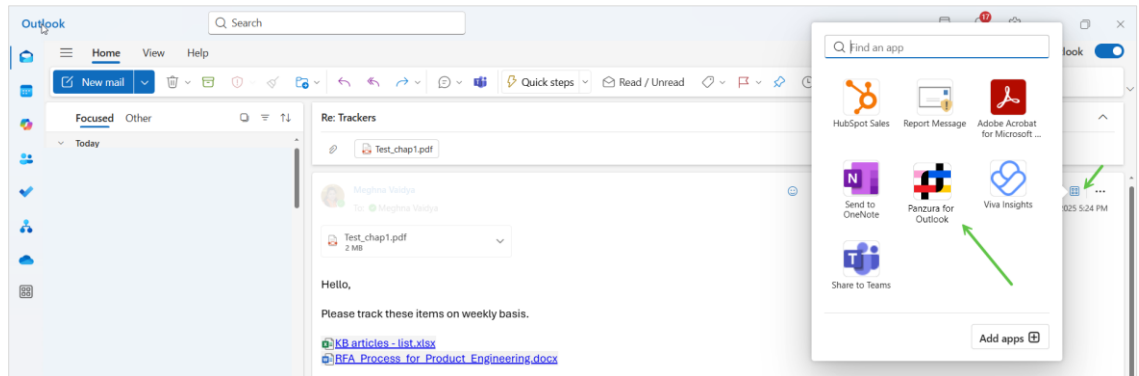
As with other shares added to emails, the share is the default type in your system. If the default share type is private, you are prompted to add recipients.



## Uploading an Outlook attachment to Panzura Edge

1. In the navigation panel click Inbox or Sent Items and then open an email.
2. In the upper-right corner of the email, click the Apps icon, and choose Panzura for Outlook.

(Click More if the Apps icon is not listed).

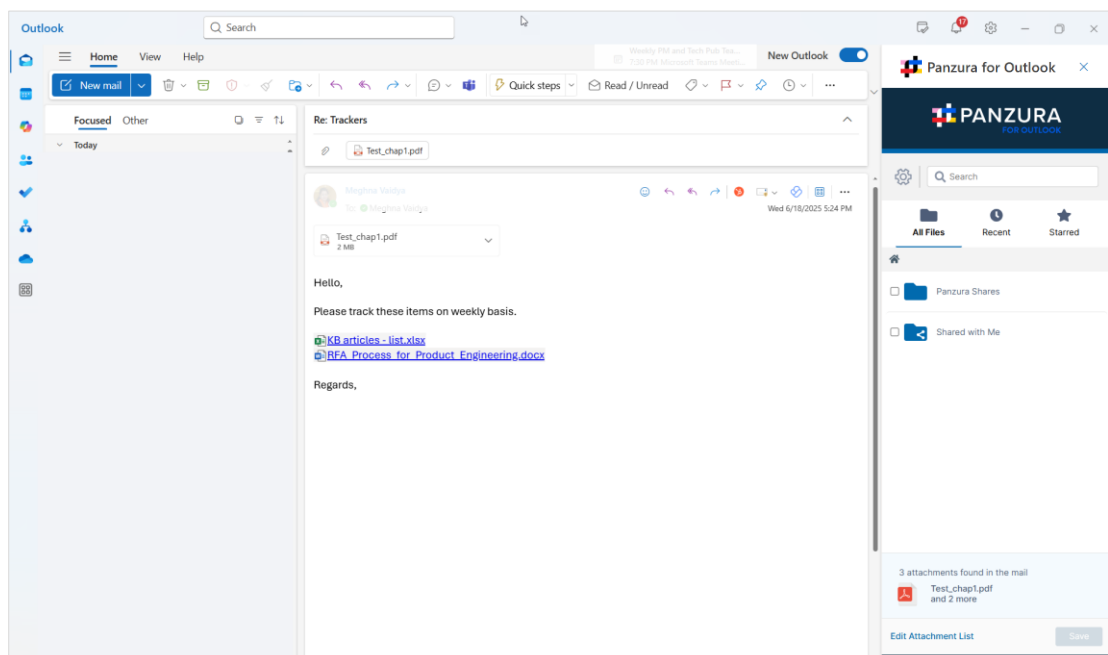


The Panzura for Outlook Add-In opens as a panel to the right of the email.

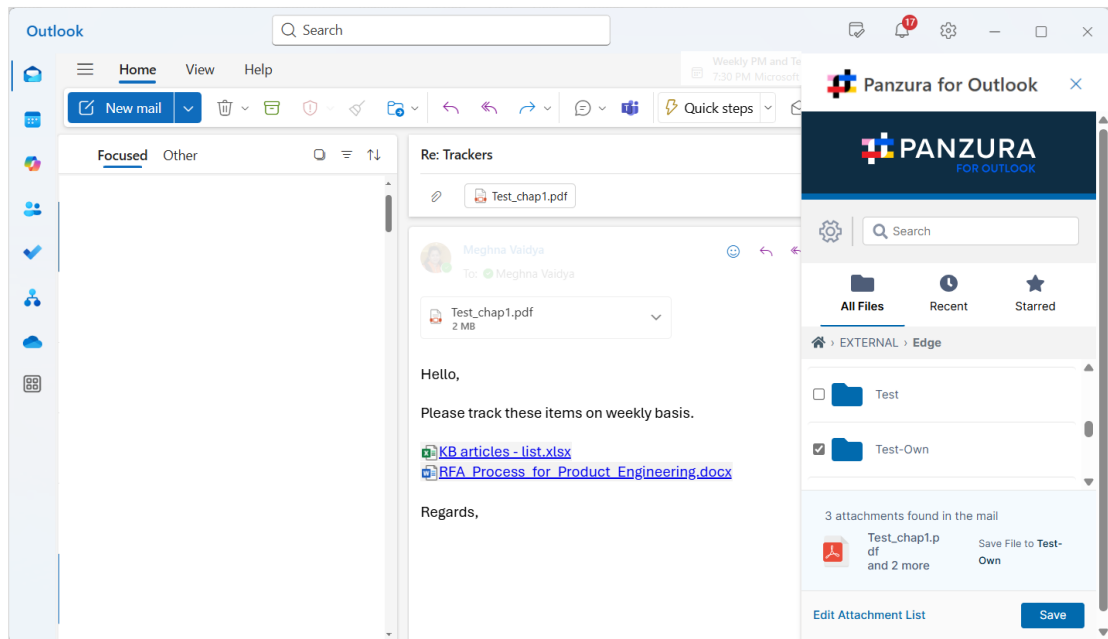
3. If you are not already logged in to Panzura Edge, log in.

By default, the email's attachments are listed at the bottom of the screen, and the Save button is not yet available.

(You can also configure custom upload settings. See Automatically uploading an email attachment to Panzura Edge, below.)



4. Navigate to and check the Panzura Edge folder you want to store the file in.



5. Click **Save**.

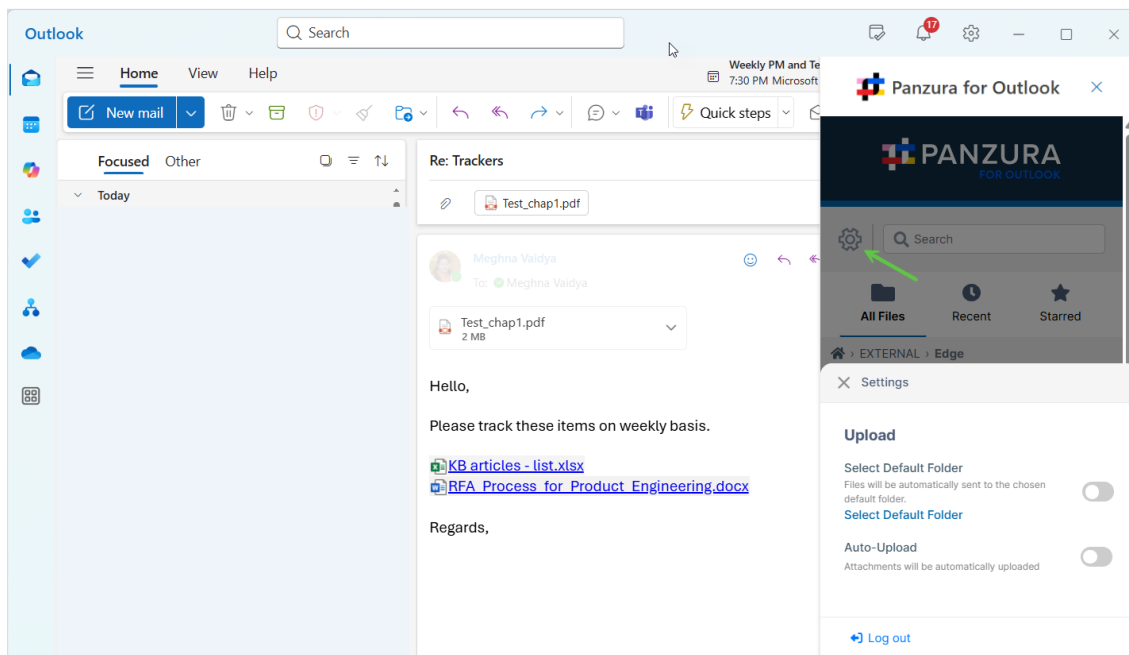
The file is now stored in Panzura Edge.

## Automating attachment upload

You can specify a default Panzura Edge folder where Outlook attachments are saved.

You can also automatically save attachments to that folder.

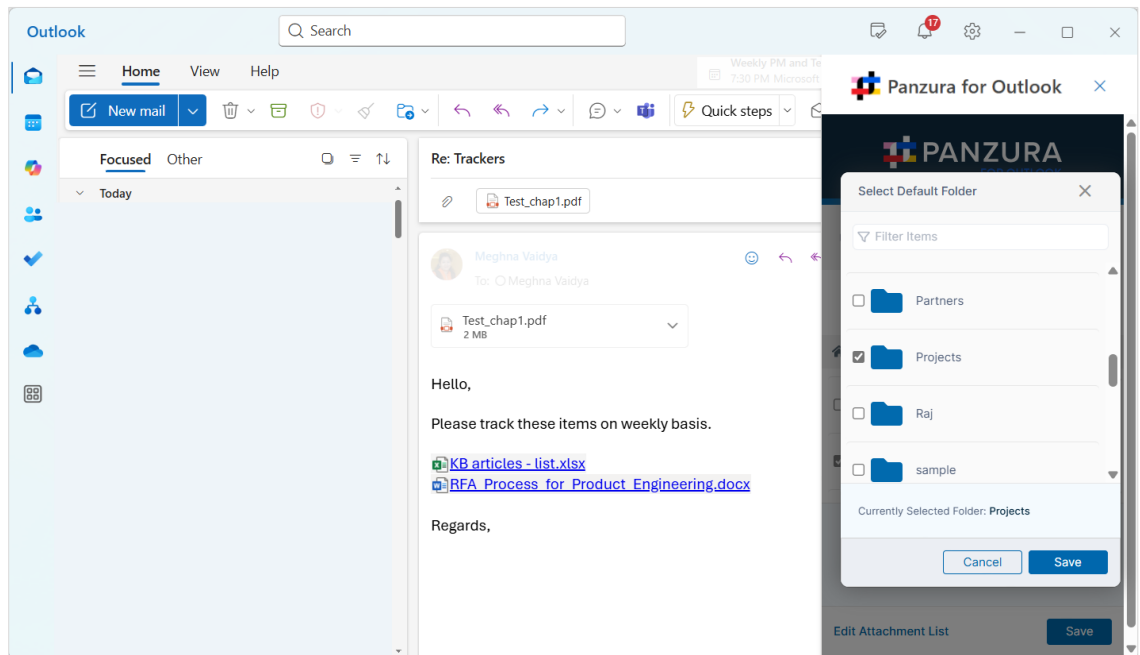
To enter upload settings, after you open the Panzura for Outlook Add-In in an email, click the cog icon next to the search bar.



Upload settings appear.

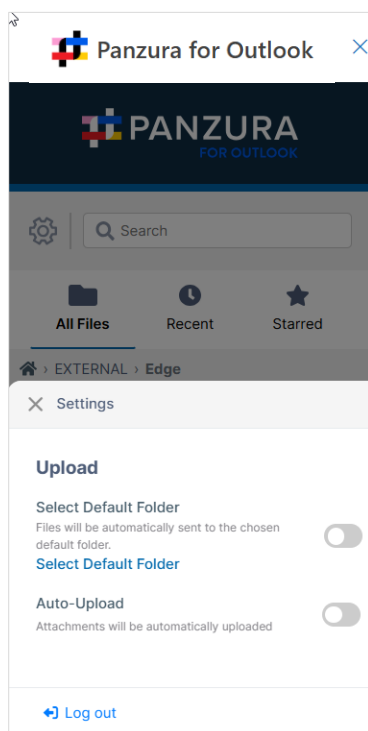
To set up a default upload folder:

1. Click **Select Default Folder**.  
Your Panzura Edge folders appear.
2. Navigate to a folder and select it.

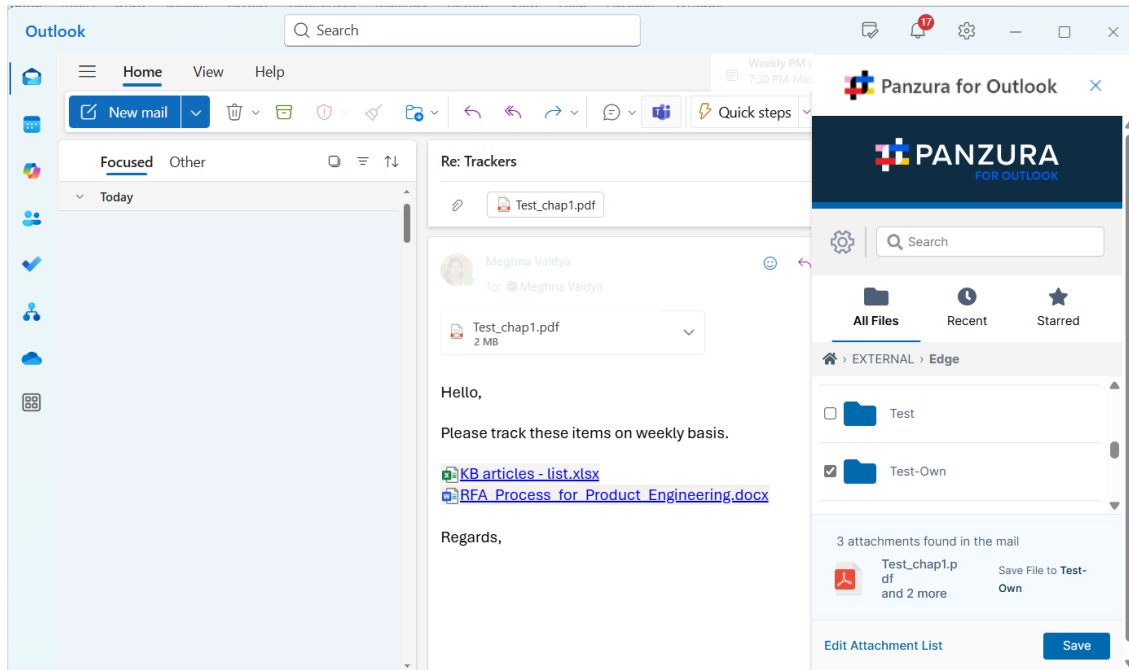


3. Click **Save**.
4. If you want email attachments to be automatically saved to your default folder when you open an email, enable Auto-Upload.

**Note:** The file is automatically saved only when the email is open and the Outlook add-in is opened beside it.

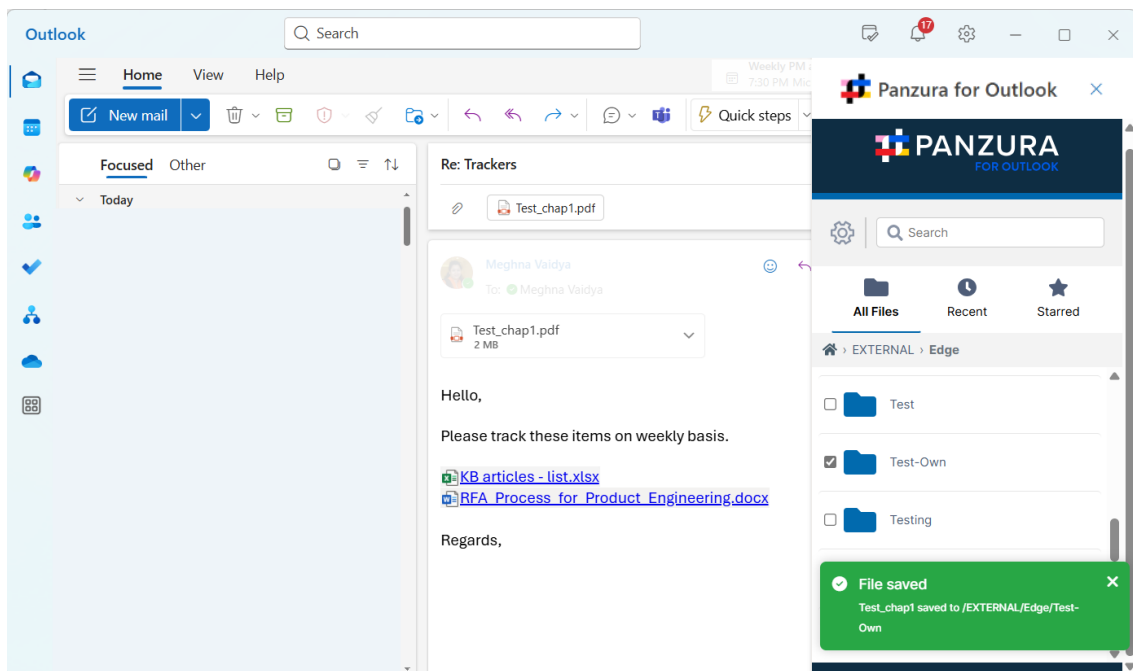


When the Panzura for Outlook Add-In is opened, if you have set up a default folder, but you have not set up auto-upload, the Panzura for Outlook dashboard gives you the option of saving to the default folder without requiring you to navigate to it.



You can click **Save** to save to the default folder or navigate to another folder and select it, and then click **Save**.

When the Panzura for Outlook Add-In is opened, if you have set up auto-upload, the Panzura for Outlook uploads the email attachment to Panzura Edge when you open it.



# Restrictions on Filenames and File Types in Panzura Edge

Please note the following restrictions when uploading files to Panzura Edge:

- Files with the same name:
  - If you upload a file with the same name and the same case as another file in the same folder, it overwrites the file.
  - If you upload a file with the same name but a different case than another file in the same folder, you cannot upload the file, and the File Operations window displays a file name conflict message.
  - If you upload files with the same name but different file extensions, like **myfile.doc** and **myfile.docx**, they are treated as different files.
- Panzura Edge cannot upload files with leading spaces in the filename.
- By default, files with the extensions php, php5, phar, and phtml cannot be uploaded into Panzura Edge.

# Troubleshooting

## I am not able to see the Panzura for Outlook Add-In inside Outlook

At times, MS Outlook may disable an add-in if there is a 0.234 second delay in starting Outlook for any reason. In Outlook, go to **File > Options > Add-Ins**. Find the Panzura for Outlook Add-In from the disabled add-ins list and enable the add-in. You can set Outlook to always enable Panzura for Outlook Add-In so that it does not get disabled.

## Log in Using Two-Factor Authentication

If your administrator has enabled two-factor authentication, you are required to enter an additional code to proceed.

2FA validation codes remain valid for 5 minutes by default. After 5 minutes, you must click Resend to get a new code.

If you are a promoted admin the login method set up for your user portal login is used for your admin portal login. However, if 2FA is set up for your admin portal login, your admin may require you to use that method for logging in to the admin portal.

### Two-factor authentication via email code delivery

If two-factor authentication is set up to use your email id, then the 2FA security code is sent to the email address associated with your Panzura Edge account.

### Two-factor authentication via SMS code delivery

If two-factor authentication is set up to use SMS, then you will receive a code via the phone number associated with the account.

### Two Factor Authentication with TOTP

If your admin sets up 2FA with TOTP, the dialog box prompting you for your security code will direct you to check your authenticator app for the code.

### Two Factor Authentication with DUO

If your admin sets up 2FA with DUO, the dialog box prompting you for your verification code will direct you to check your DUO mobile app for the code.