

# Panzura for Outlook Add-In

July 2025

## 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 Ou	ıtlook. 14
Log in Using Two-Factor Authentication	

## 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 <u>log in</u> <u>using 2FA</u>.

📫 Panzura for Outlook 🛛 🗡
Log in to your account
Server URL
https://demo-edge.panzura.com
Account
Password
**********
Login
Check out our documentation at: panzura.com/clients-heip

**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 🕮, which appears when **Message** is selected in the menu bar and choose **Panzura for Outlook**.

Out	ook Q Search		ß	Q. Find an app	o ×
	E Home View Help Message	Insert Format text Draw Options			
	"> " □ ~ ♥ Aptos ~ 12	- B I U S ∠ - Ab I	<u>∃</u> <u>→</u> → → → → → → → → → → → → → → → → →	aA · D	
•	Focused Other =	▷ Send		HubSpot Sales Exclaimer Cl for Outlo	oud Panzura for ok Outlook J D
#		То			
~		Cc		Adobe Acrobat My Temple for Microsoft	tes Polls
*		Add a subject			2:13 AM
•				Viva Insinhts	
60					
					Add apps 🕀

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.

Outl	ook Q Search	4	🖓 🖓 🕸 – o 🛛
	Home View Help Message Ins	ert Format text Draw Options Weekly PM and Tech Pub Tea New Outlook	📫 Panzura for Outlook 🛛 🗵
	∽ 🖓 × 🕅 × 🗟 Aptos – 12 –		
•	Focused Other	▷ Send v           ♥ Send v         ♥ v         ♥ 2	
*		To	C Search
*		Cc	
*		Add a subject Draft saved at 4:32 PM	All Files Recent Starred
•			☆ EXTERNAL > Edge
00			Migrate Test
			mike
			Partners
			Projects
	Nothing left to read Enjoy your empty inbox.		🗆 💼 Raj
			sample
			Stub Test
			Taylor
			TA Labs Demo
			Nothing selected
		N AL 1711 MALE 11 A S7	

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

Outle	Q Search		🗟 🥵 – 🗆 x
	Home View Help Message In	sert Format text Draw Options Weekly PM and Te	📫 Panzura for Outlook 🛛 🗵
•	Focused Other = 14	B 1 Q 5 =₄ ∨ 12 ∨ 0 ∨ 0 0 0	
*		To           Cc	Q Search
*		Add a subject	All Files Recent Starred
•			A > EXTERNAL > Edge > Test-Own
88			test.bmp
			🗆 🚍 test.txt
	Nothing left to read Enjoy your empty inbox.		
			1 item selected
		Nothing in folder / (No subject) ×	

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.

Outle	ook Q Search		🗟 🕻 🎯 🖓 – 🗆 X
	E Home View Help Message In:	sert Format text Draw Options 🕞 Now, Micr	n <sup>25</sup> <b>1</b> Panzura for Outlook ×
	🖸 New mail 🗸 🗑 🗸 🗟 🗘	$\circ$	· ·
•	Focused Other	▷ Send   ~	
#		То	
		Cc	र्छे Q Search
*		Add a subject	All Files Recent Starred
			A > EXTERNAL > Edge > Test-Own
000			🗆 🚍 test.bmp
			test.txt
	Nothing left to read		
	Enjoy your empty inbox.		L A rescalapi.pdf
			Success ×
			Users successfully added to shares.
		Nothing in folder / (No subject)	

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.

Outle	Q Search		🗟 🕼 🎲 – 🗆 X
	Home View Help Message	sert Format text Draw Options E 7,30 PM Microsof	茸 Panzura for Outlook 🛛 🗵
	$\checkmark$ $\checkmark$ $\bigcirc$	B I U S ≕ · · · ·   10 × G ×	
*	_	То	
•		Cc	
*		Add a subject	All Files Recent Starred
			uploads.db
			Attaching file to email
	Nothing left to read Enjoy your empty inbox.		uploads.db.old
			• Attaching files as links X Selected files do not meet Outlook's attachment criteria. They will be attached as links.
		Nothing in folder / (No subject) ×	

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.

$\stackrel{\scriptstyle >}{=}$ Panzura for Outlook $\times$			
🐼 🛛 Q Search			
All Files Recent Starred			
Settings			
Upload			
Select Default Folder Files will be automatically sent to the chosen default folder. Select Default Folder			
Auto-Upload Attachments will be automatically uploaded			
+J Log out			

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.

Outl	ook Q Search		🗟 🖓 🎲 – 🗆 X
	Home     View     Help       ☑ New mail     ✓     ☑ ✓     ☑     ✓	Weekly PM □ 730 PM Mic • ← ← ← 2 ⊂ € ~ € ∲ Quick steps ~	📫 Panzura for Outlook 🛛 ×
9	Focused     Other     □     □       ∨     Today     ^	Re: Trackers	
~	I	Meghna Valdya 🕲 G	<ul> <li>Q Search</li> <li>Q Search</li> </ul>
<u>^</u>		Est_chap1.pdf	All Files Recent Starred
000		Please track these items on weekly basis.	Test
		ternor and the second	3 attachments found in the mail
			Test_chap1.p Save File to Test- df Own and 2 more Own
	V. 101 (101 (101 (101 (101 (101 (101 (101		Edit Attachment List Save

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 you 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.