

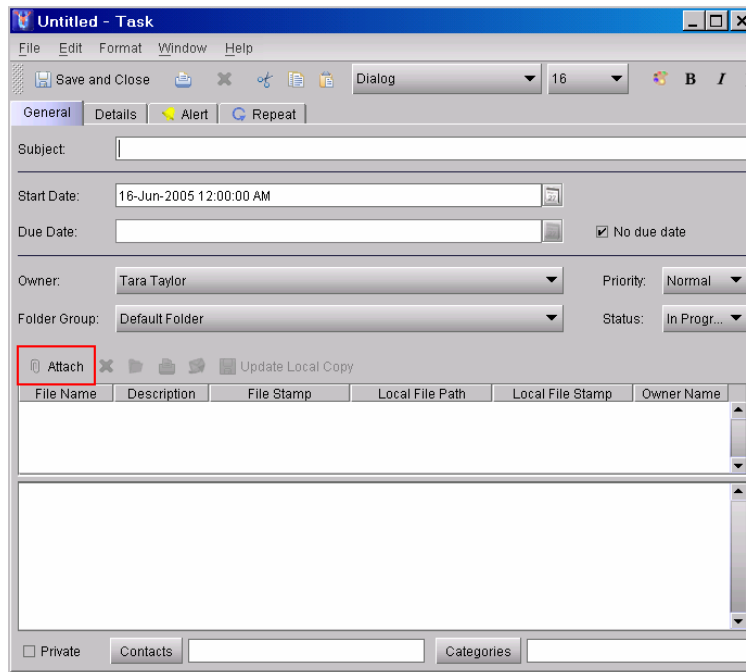
## File Sharing Module

You are able to attach files to Address Book contacts, Appointments, Tasks, Notes and Project Tasks. These files will be visible to all contacts that have access to your various items. In order to be able to access files that other users have attached, the user that attached the file must be online until you make a local copy. Once a local copy is available, you will no longer need to download the file from the other user. The system automatically keeps track of whether you have that file available locally or not. UVC will also detect if the owner of the file has made changes to it and will notify you that changes have been made in order for you to make a new local copy.

### To Attach a File to an Item

To attach a file to an item use the following steps:

1. Find the item that you would like to attach a file to.
2. Double click on it.
3. Click on the **Attach** button in the middle of the screen.



4. Find and select the file you would like to attach.
5. Click on **Open**.

Your file should now be listed in the white area indicating that it is attached.

### To Remove a File Attachment from an Item

To remove a file attachment from an item use the following steps:

1. Find the item that you would like to remove the attachment from.
2. Double click on it.
3. Select the file you wish to remove.
4. Click on the Remove button, indicated by an X, above the attachment list.

Your file will now be removed.

## **To Open a File Attachment**

To open a file attachment use the following steps:

1. Find the item that you would like to open the file attachment from.
2. Double click on it.
3. Double click on the file you wish to open.

Your file will now open in it's default program.

## **To Make a Local Copy of a File Attachment**

If another user has attached a file to an item you are able to make a local copy of the file on your hard drive so that you can view the file whenever the need arises without the other user needing to be online. To make a local copy of a file attachment use the following steps:

1. Find the item that contains the file that you would like to make a local copy of.
2. Double click on it.
3. Select the file you wish to make a local copy of.
4. Click on the **Update Local Copy** button located above the attached file list.
5. Select the directory where you wish to save the file.
6. Click on **Save**.

A status bar will appear indicating it is saving the file. Once it is completed the **Local File Path** and **Local File Stamp** information in the file list will be filled in.

## **Making Changes to a File if you are not the Owner and Re-Attaching it**

If you make a local copy of a file of which you are not the owner and then make changes to the file, other users will not be able to see the changes you have made because you are not the owner. You need to re-attach the file so that other users can see the changes. When you do this it is a good idea to give the file a new description to indicate that this is an update.

## **If a File Attachment Appears Red**

UVC will track if the original owner of a file has made changes to the file. If this happens and you have made a local copy of the older file, UVC will notify you by making the file attachment appear as red in the file attachment list. If you see a file appear as red it means that there has been changes made to it since you made your local copy and you need to make a new local copy.

## **Issues With File Attachments and Firewalls**

If you are behind a firewall you may have difficulties sharing your files with other users. There are 2 ways to resolve this. The first is to make modifications to your router/firewall to open and forward port 6891 to your computer. The way to do this is dependant on each router/firewall manufacturer so please check with your router/firewall documentation on how to do this. If this is not an option you can also download our P2P plugin which is designed to try and automatically transfer files even when you are behind a firewall. Both users have to have the plugin installed in order for this to work. Please keep in mind that when you do use the P2P plugin you may end up relying on other peers on the internet to act as gateways in order to facilitate file transfer. All file communication is encrypted for security as long as you have the Gold edition.

### *Downloading the P2P Plugin*

To download the P2P plugin use the following steps:

1. Go to the **File** menu on the top menu bar.
2. Select **Options and Preferences**.
3. Click on **Plugins** under the **General** tab.
4. A list of available plugins will be listed in the bottom right area of the screen, find the P2P File Transfer Plugin.
5. Click on **Download**.
6. You will get a message asking if you want to restart UVC, click on **Yes**.

Your plugin will now be installed.