FileCloud Online Version 23.232

End User Guide

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What do you want to do?

Use the FileCloud Web Browser (User Portal)	Web Browser (User Portal)
Share my files...	Sharing Files and Folders
Develop automated solutions for existing business processes	FileCloud Automation App

In this section

- About FileCloud for Users
- Accessing FileCloud
- User Account Types
- Web Browser (User Portal)
- Integration with MS Teams
- FileCloud Automation App
- Restrictions on Filenames and File Types in FileCloud

About FileCloud for Users

FileCloud is a software solution that provides your organization with file access, file sharing, and file synchronization, and gives you complete control of your data with unmatched security.

How Do I Use FileCloud?

FileCloud supports how you work:

Choose your operating system (Windows, Mac, Linux OS)

Choose a mobile device to access files regardless of your location (iOS, Android, Windows Phone)

Choose which browser you want to use (Google Chrome, Microsoft Edge, Mozilla Firefox, Safari)

Mount your FileCloud data as a Windows drive

Access files stored in FileCloud from your Microsoft applications

Choose the types of files you want to preview, sync and share (Adobe Illustrator, medical files, Microsoft WORD, Adobe PDF Reader, Microsoft Office PowerPoint and Excel)

Do I have any limitations on storage or usage?

Although an administrator can configure these options differently, by default, you have the following storage and activity limits in the FileCloud system:

Type	Description
Max number of files in system	No limit
Max number of folder in system	No limit
Folder depth limit	None

Type	Description
Path limit	No limit imposed by FileCloud. However, If that path is synced, then windows OS has 256 character limit. Any folder/file name with path that exceeds 255 char will not be accessible via file explorers (Though the folder contents will sync) Network shares' path cannot exceed 256 characters. Please note that folder/file names of Excel files must not be longer than 218 characters: Excel specifications and limits
Single file upload limit	No limit
Single file download limit	No limit
Folder or Multi file download	Windows: 4GB (zipped file size should not exceed 4GB)
User storage quota limit	None
Managed storage max single file size limit	None imposed by system
Folder upload limit (Drag and drop in browser)	100 files or folder will be uploaded if a folder is uploaded using drag and drop (No limit if uploading using file/folder chooser)
Real time sync limit	100000 files
Thumbnail	Not shown for image files larger than 100MB

Accessing FileCloud

Your FileCloud administrator will provide you with a FileCloud account.

- An administrator can configure FileCloud to allow you to create your own account.
- An administrator can also configure FileCloud to require admin approval before connecting
- You will notified by email when trying to connect (Admin approval pending)
- You will also be notified by email when the administrator has approved the device you are trying to connect with
- Once an user account is created, it can be assigned different access levels.

What types of accounts are there?

Upon receiving your account details, you can access FileCloud in the following ways:

Web Browser

Log into the User Portal

Install the Chrome Browser Extension so you can save to FileCloud

Install the Gmail Extension

Mobile Apps

Access your data on the go!

Apple iOS app

Android App

Desktop clients

Don't want to use the browser? No problem!

Use a desktop client for Windows, Mac, or Linux OS.

FileCloud Drive

FileCloud Sync

FileCloud Drive for Mac

Use a WebDAV client

What's the difference between FileCloud Drive and FileCloud Sync?

Inside a Microsoft Application

Working on a Microsoft document and don't want to leave?

Install the Microsoft Outlook Add-In

Install FileCloud for Office - This is an Office integration add-in for FileCloud Sync and FileCloud Drive clients. It supports automatic file-lock management, share management and version visibility for:

- Word
- Excel
- PowerPoint

User Account Types

Once an enterprise installs FileCloud, the FileCloud administrator will provide each user with an account.

Table 1. User Types Comparison

User Access Feature	Full Access	Guest Access	External Access
User Portal (Web Browser) Access	Permitted Fully functional	Permitted Not all functions available	Permitted Not all Functions Available
View shared files	Permitted	Permitted	Permitted
---	---	---	---
Authentication	Local / ActiveDirectory	Local / ActiveDirectory	Local Only
Mobile App Access	Permitted Fully functional	Permitted Not all functions available	**Not Available**
Personal storage in FileCloud	Available	**Not Available**	**Not Available**
Share files with other users	Permitted	Permitted	**Not Available**
Access storage using Cloud Drive	Permitted	Permitted	**Not Available**
Sync storage using Cloud Sync	Permitted	Permitted	**Not Available**
SSO Login	Permitted	Permitted	**Not Available**
Group Membership	Can be member of any group	Can be member of any group	Can be member of any group except Everyone.
Admin Account	Can be Admin Account	Can be Admin Account	Cannot be an Admin Account

User Access Feature	Full Access	Guest Access	External Access
Team Folders	Permitted	Permitted	**Only via shares created by users**
Automation App	Permitted	Permitted	**Not Available**
File and Folder Comments	Permitted	Permitted	**Not Available**
2FA	Permitted	Permitted	Available by license beginning in Version 20.2 for enterprise customers.

Once a user account is created, it can be assigned different access levels. There are four different access levels for a user account.

Admin Access

An account with admin access level has complete control over the FileCloud system. This account will be used to manage the FileCloud server instance. Other users can be marked as 'admins' and given limited set of permissions.

Full Access

An account with full access has its own private cloud storage space in the "My Files" area. These users can:

- store files in their own private cloud storage space
- view/download files stored in their storage space
- view/download files shared with them by other user accounts

Guest Access

An account with guest access level have restricted access to the FileCloud system. These user accounts do not have a private cloud storage. These users can:

- view/upload/download files shared to them by other user accounts
- They can re-share content if they have permissions

External Access

An account that can only be used to access the User Portal through a Web browser. External Accounts can:

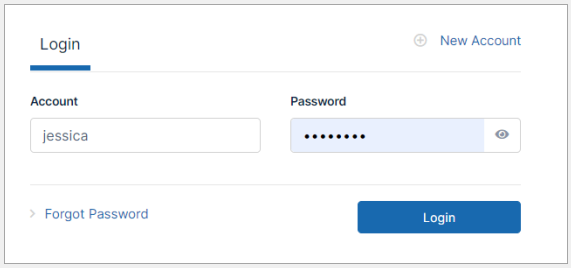
- view/upload/download to content shared with them

External Access accounts can only be local user accounts.

Web Browser (User Portal)

You can access your files stored on the FileCloud server through a web browser.

- The User Portal allows you to manage the files you want to store and save using the FileCloud Server site.
- After an administrator has installed and configured the site, you will be sent information on how to log in.
- Use the portal to securely access your enterprise data from anywhere using any device



Note: If single sign-on is enabled, a link for single sign-on also appears on the log-in screen.

As a FileCloud user, you need 3 pieces of information to access your FileCloud account.

FileCloud URL: Your Admin or Hosting Provider will provide you with the URL to your site.

Account: You can log in a few different ways:

- **Your Admin will provide you with your account name.**
- **You might have permissions to create a new account yourself for the first time.**
- **You might be able to use the same name as your organizational login.**

Password: As with account, it can be created in a few different ways:

- **Provided by your Admin when your account was created.**
- **Created by you if you created your own account.**
- **The same as your organizational login password.**

In this section:

- Logging In to the User Portal
- Places in the User Dashboard
- My Files, Team Folders, and Shared with Me
- Basic File and Folder Operations
- Advanced File and Folder Operations
- Sharing Files and Folders
- Notifications
- Workflow Automation
- Mini Admin Portal

Logging In to the User Portal

You can connect to FileCloud with your web browser by using a link or typing in the address that you have received from your administrator or service provider.

You must have the following 3 pieces of information to access FileCloud:

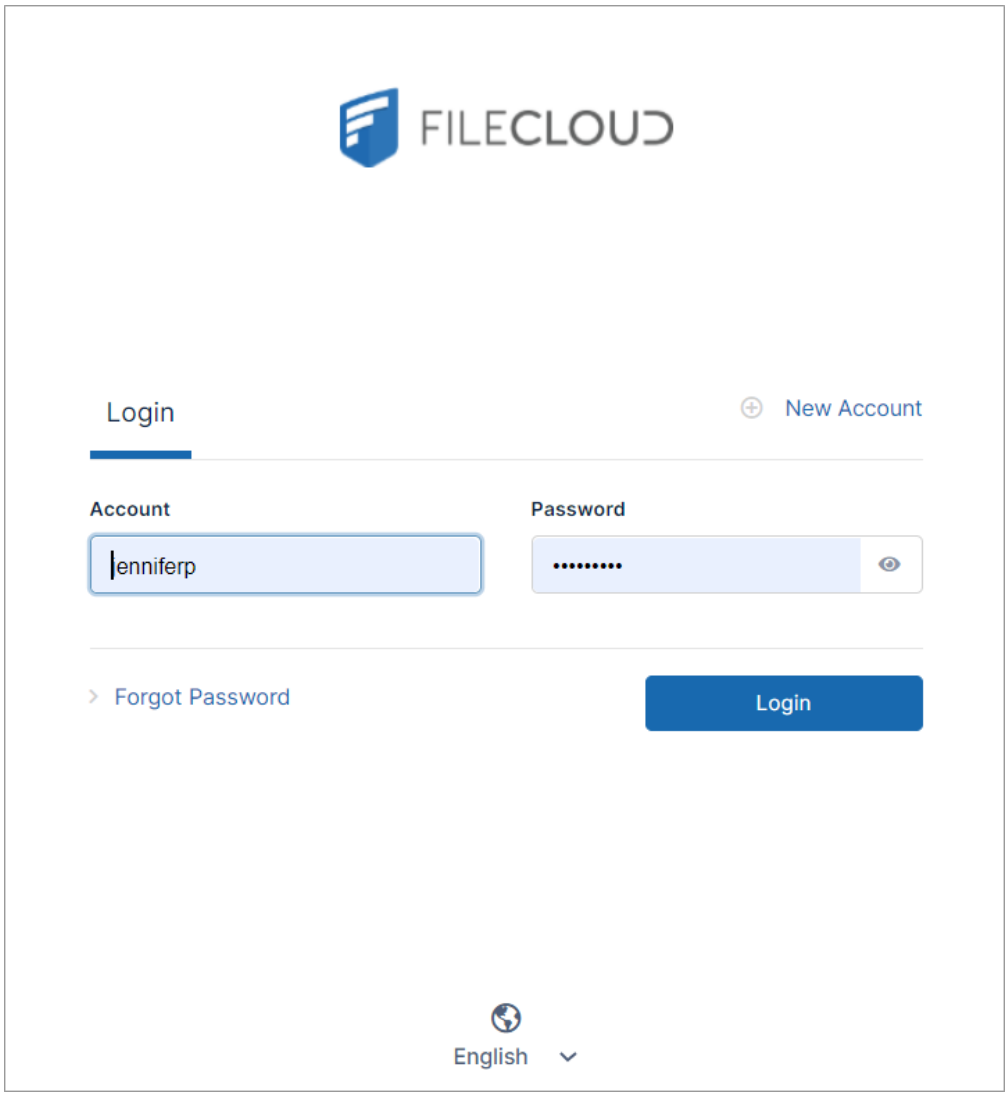
- **FileCloud URL:**
  The URL to your site. For example: https://myFileCloudTeamSite.FileCloud.com. Your administrator provides you with this URL.

- **Account:**
  Your administrator either**:**
  - provides you with this name
    or
  - gives you permission to create a new account yourself for the first time
    or
  - enables you to use the same name as in your organizational login

- **Password:**
  Either:
  - your administrator provides you with your password
    or
  - if you have created your own account, you enter a password
    or
  - your administrator enables you to use the same password as in your organizational login

This information may be in your Inbox. Check to see if you received an Invitation or Welcome message from FileCloud.

Enter the URL to access the log-in screen:



Note: If single sign-on is enabled, a single sign-on link also appears on the log-in screen.

Also see:

- Log in Using Two-Factor Authentication
- Creating A New User Account
- Reset a Forgotten Password
- What is single sign-on (SSO)?

Log in Using Two-Factor Authentication

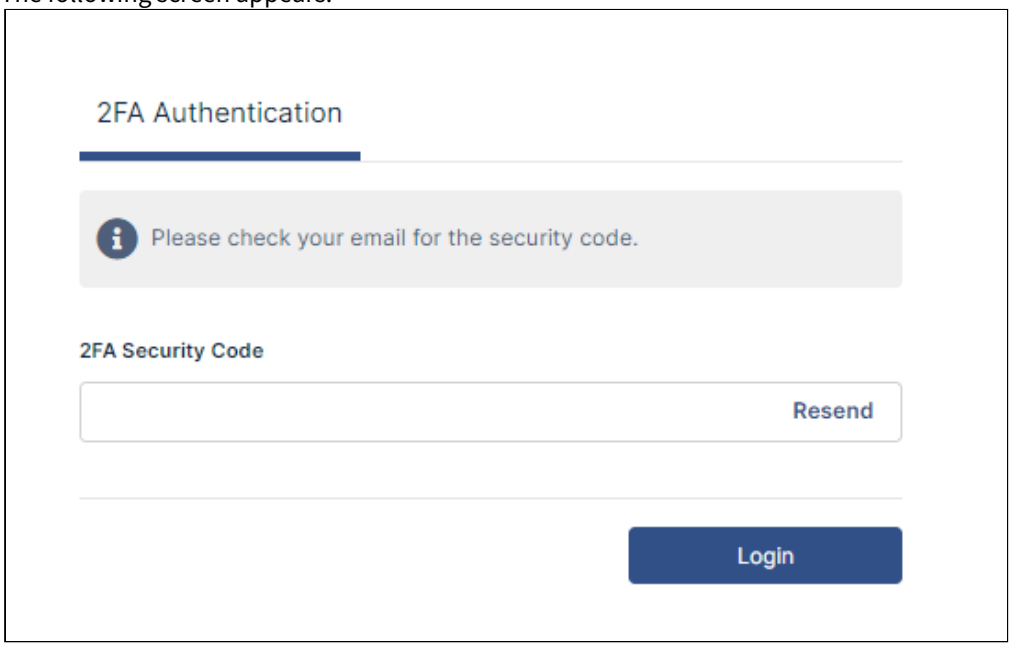
If your administrator has enabled two-factor authentication, you are required to enter an additional code in order to proceed.

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

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 FileCloud account.

1. Log in to FileCloud using your username and password.
   The following screen appears:



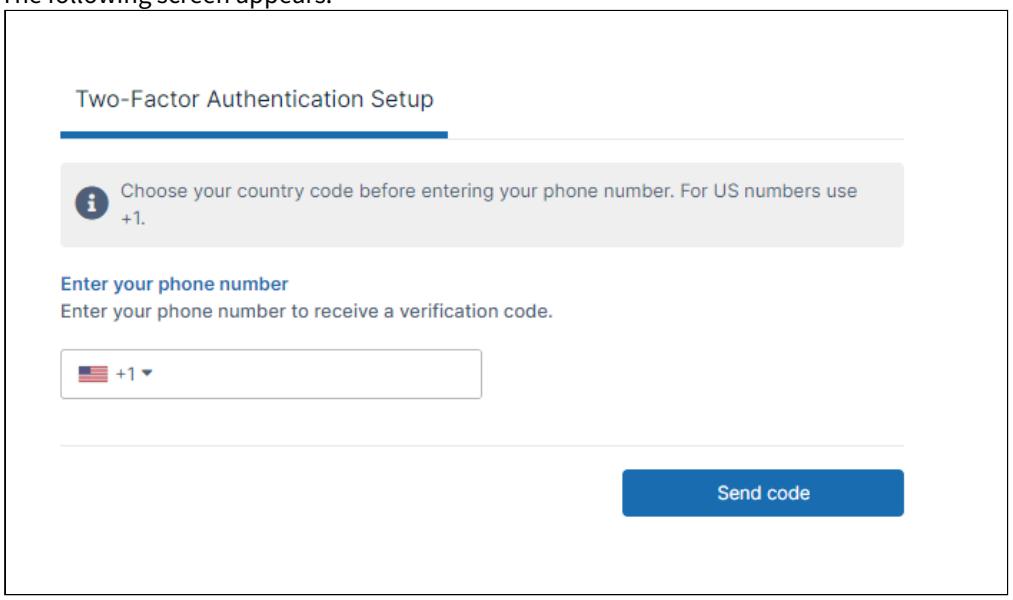
2. Check your email for the message with the code, and enter it into **2FA Security Code**.
3. Click **Login**.
   You are logged in to FileCloud.

Two-factor authentication via SMS code delivery

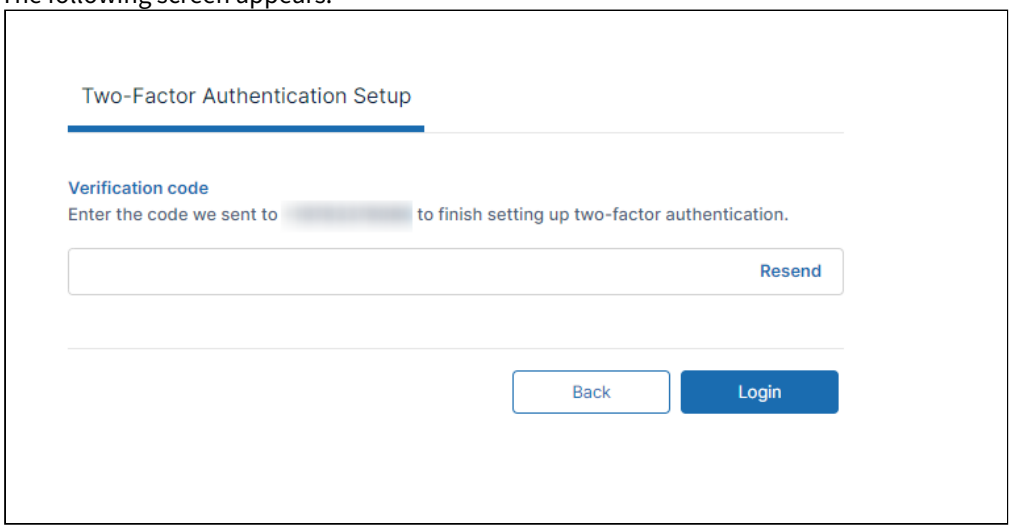
If two-factor authentication is set up to use SMS, then you will receive a code via the phone number associated with the account.

The initial time you log in using SMS

1. Log in to FileCloud using your username and password.
   The following screen appears:



2. Enter your phone number and click **Send code**.
   The following screen appears:

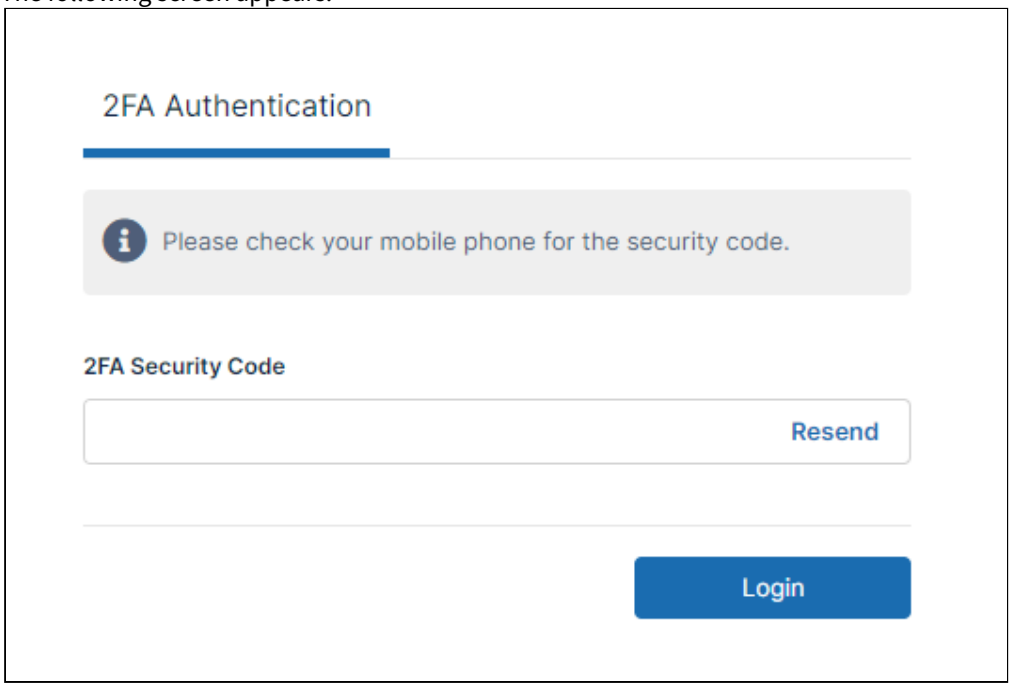


3. Check your phone for the code, and enter it into **Verification code**.
4. Click **Login**.
   You are logged in to FileCloud.

After the initial time you log in using SMS

FileCloud has saved your phone number the first time you logged in using SMS, so you do not have to enter it again.

1. Log in to FileCloud using your username and password.
   The following screen appears:



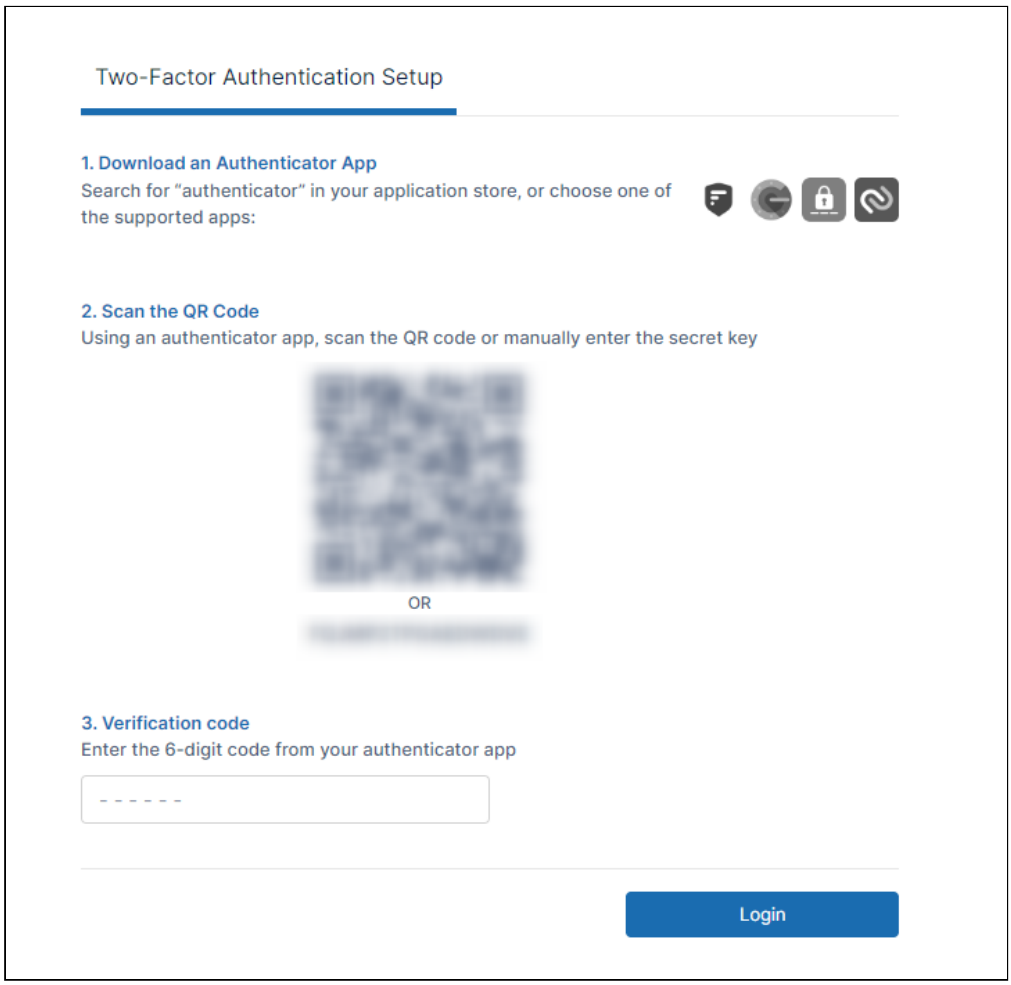
2. Check your phone for the code, and enter it into **2FA Security Code.**
3. Click **Login**.
   You are logged in to FileCloud.

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.

The initial time you log in using TOTP

1. Log in to FileCloud using your FileCloud username and password.
   The following screen appears:

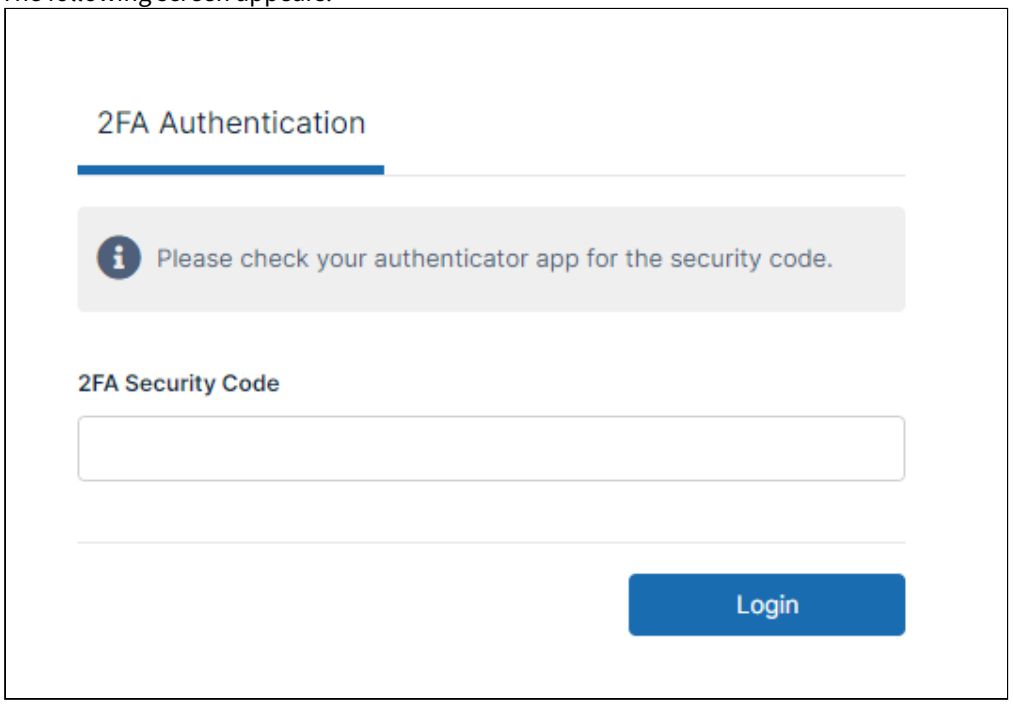


2. If an authenticator app is not yet set up, install it in your smart device; you may click one of the download icons to install it.
3. Either scan the QR code or type the text code into the authenticator app.
   The authenticator app creates the account and lists it with a code.
4. Enter the code listed on the authenticator app for your account into **Verification code**, and click **Login**.
   You are logged in to FileCloud.

After your initial login with TOTP

The authenticator app has saved your account the first time you logged in using TOTP, so you do not have to enter it again.

1. Log in to FileCloud using your FileCloud username and password.
   The following screen appears:



2. Enter the code listed on the authenticator app for your account into **2FA Security Code**, and click **Login**.
   You are logged in to FileCloud.

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.

The initial time you log in using DUO

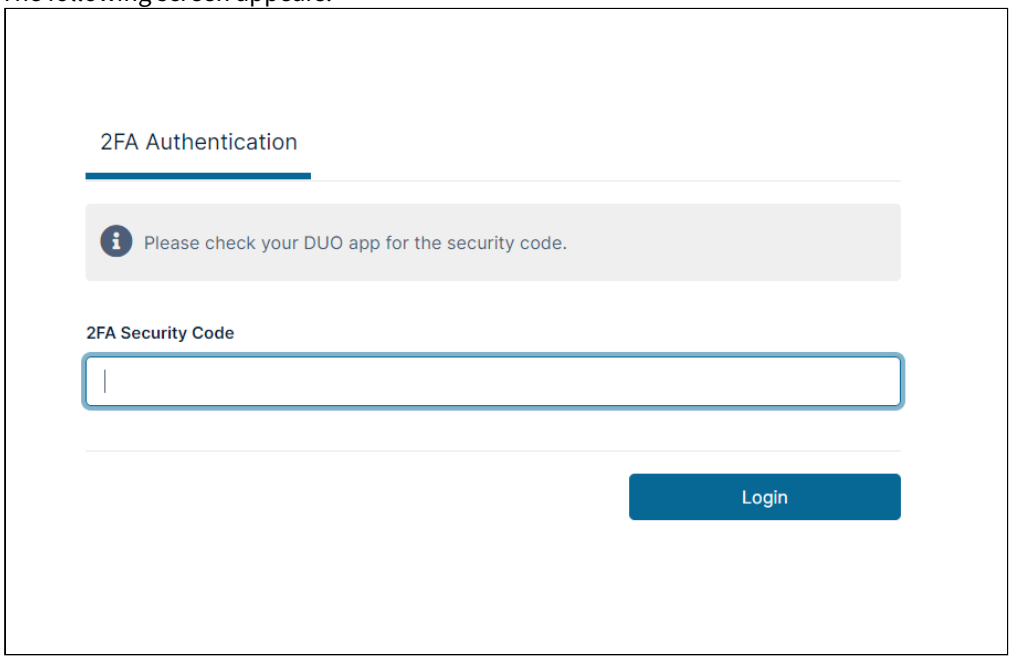
1. Log in to FileCloud using your FileCloud username and password.
   The following screen appears:

2. If the Duo mobile app is not yet set up, install it in your smart device; you may click one of the download icons to install it.
3. Scan the QR code using the Duo mobile app.
   The Duo mobile app creates the account and lists it with a verification code.
4. Enter the code listed on the Duo mobile app for your account into **Verification code**, and click **Login**.
   You are logged in to FileCloud.

After your initial login using Duo

The Duo mobile app has saved your account the first time you logged in using Duo, so you do not have to enter it again.

1. Log in to FileCloud using your FileCloud username and password.
   The following screen appears:



2. Enter the code listed on the Duo mobile app for your account into **2FA Security Code**, and click **Login**.
   You are logged in to FileCloud.

Creating A New User Account

FileCloud allows you to create your own user account.

⚠️ However, this option is configured by your administrator and may not be available depending on your company's policies.

If your account requires admin approval:

You are notified by email when:

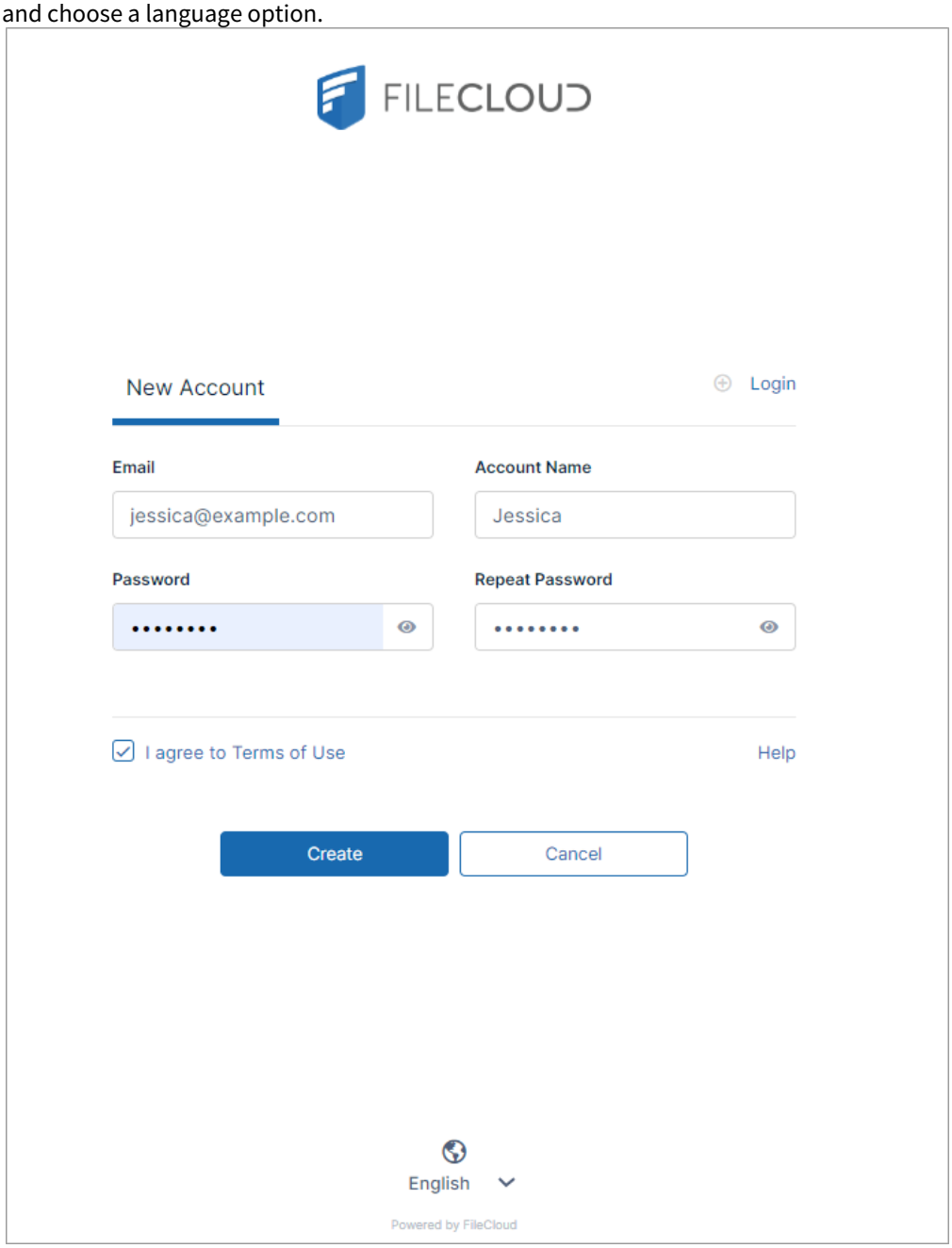
- You initially try to connect (admin approval pending)
- When the administrator has approved the device you are trying to connect with

💡 If you click the **New Account** button and get an error, please contact your administrator. Your company policies may not allow to create your own account.

To create a new user account:

1. Open a Web browser.
2. Type in the URL provided by your Administrator. For example, **https://<yourteamname>.filecloudonline.com**
3. Click the **New Account** button.
   A **New Account** window opens.
4. In **Email**, type in the address where you want to receive notifications about FileCloud issues.
5. In **Account Name**, type in a string of characters.
6. In **Password** and **Repeat Password**, type in the same string of characters.
   Check with your administrator for password requirements.
7. Click **I agree to Terms of Use**, and read the terms of use, then click the checkbox.

8. If you want your user interface to display a language other than English, click **English** at the bottom of the page, and choose a language option.



9. Click **Create**.
   The screen displays **Success** and the message **Check your email account for instructions to activate your account**.

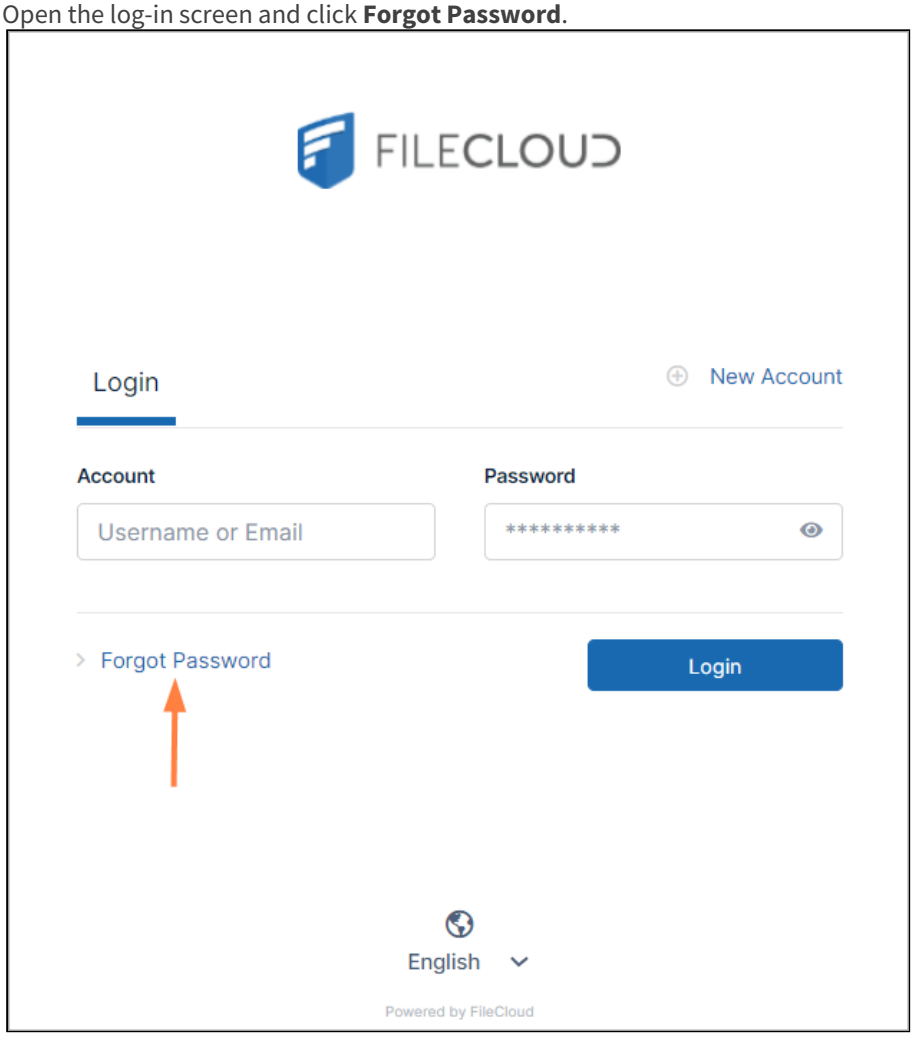
Reset a Forgotten Password

Depending on the configuration of your system, the **Forgot Password** option may not appear in your log-in screen. If it does not appear, you must contact your administrator to reset your password.

If you are an AD or LDAP user, the Forgot Password option is not functional for you. If you have forgotten your password, please contact your administrator.

If you forget your FileCloud password:

1. Open the log-in screen and click **Forgot Password**.



A new screen opens.

2. Enter your email or username and click **Reset Password**.

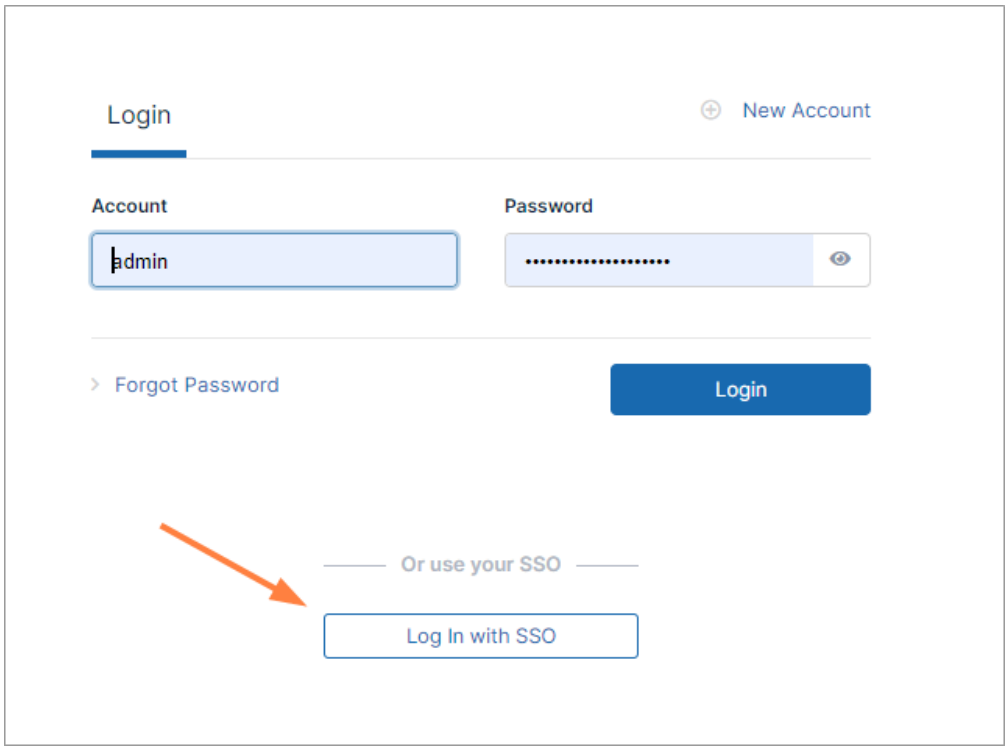
The message **Check your email account for instructions to reset your password** appears.

What is single sign-on (SSO)?

Single sign-on is a feature that enables you to enter your username and password once to log in to multiple software applications.

For example, single sign-on could enable you to log in to FileCloud and your company website at the same time so you could upload company files to FileCloud.

If single sign-on is enabled in your system, your user portal log-in screen appears as:



Click **Log In with SSO** and log in with your FileCloud username and your SSO password.

Places in the User Dashboard

> Depending on the type of user account you have in FileCloud, some of the information and options shown in the video may not be available to you.

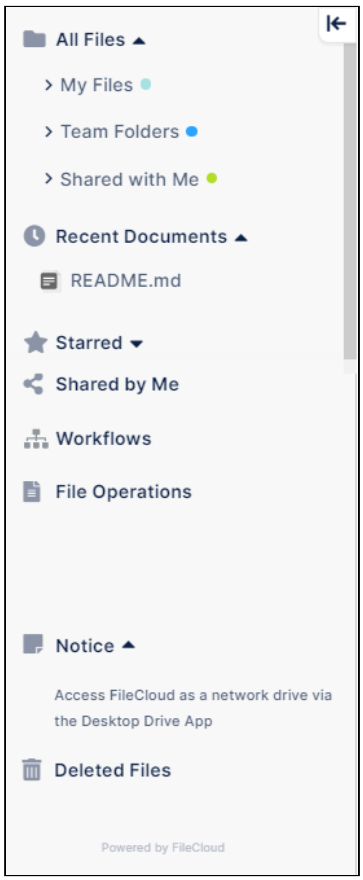
The first screen you see when you log in to FileCloud is the user dashboard. It's the place where you manage all of your files and share them with your colleagues and teams.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

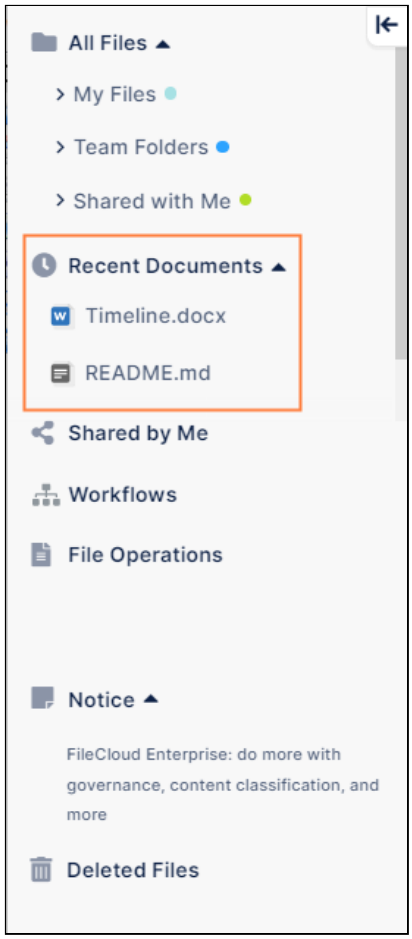
Navigation Panel

The navigation panel in the user dashboard takes you to the folders that store your FileCloud files; it also displays notices and opens a page that shows file operations. .

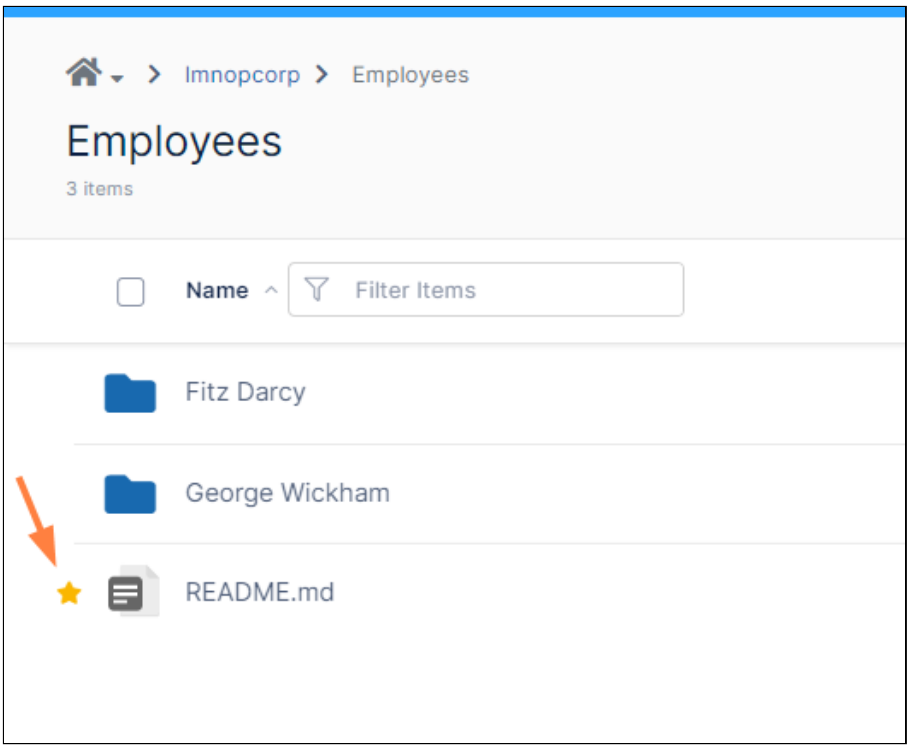


All Files - Click the folders in this section to access all of your local and remote FileCloud fies. For information about the folders, see My Files, Team Folders, and Shared with Me.

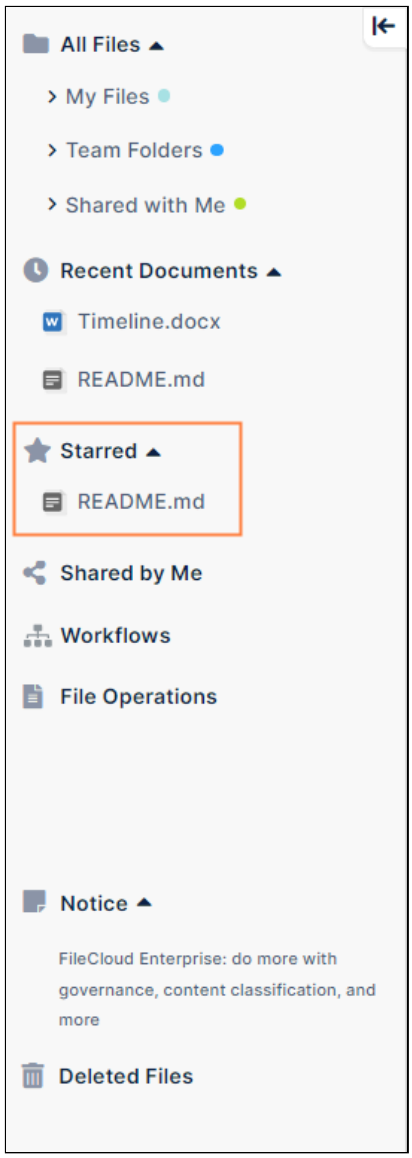
Recent Documents - Click **Recent Documents** to view a list below it of the files that you have accessed recently. Click on a file to see a preview of it.



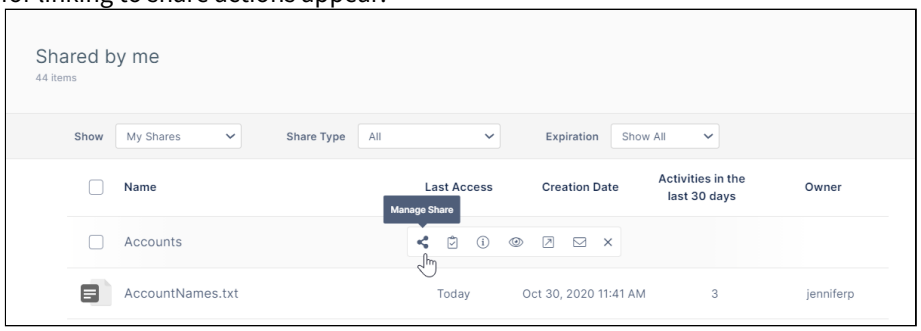
Starred- To add a file or folder to the **Starred** list, click the star next to it in the main section of the screen:



All of the files and folders that you have starred appear under **Starred** when you expand it in the navigation pane. Click on a file under **Starred** to preview it. Click on a folder under **Starred** to view its contents in the main section of the screen.

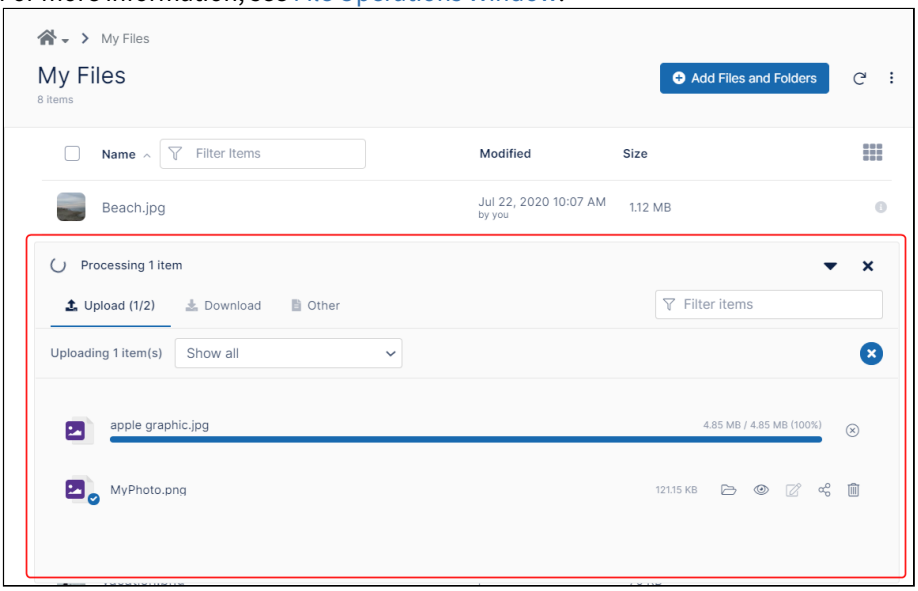


Shared by Me - Click **Shared by Me** to list all of the files and folders that you have shared in the main section of the screen. If you hover over one of the shares, icons for linking to share actions appear:



For more information about working with **Shared by Me** files, see Viewing Existing Shares.

File Operations - Click **File Operations** to view a pop-up screen that shows the progress of file operations when they occur. When the operation is complete, the file is displayed with an overlay icon indicating if the operation was successful. For more information, see File Operations Window.

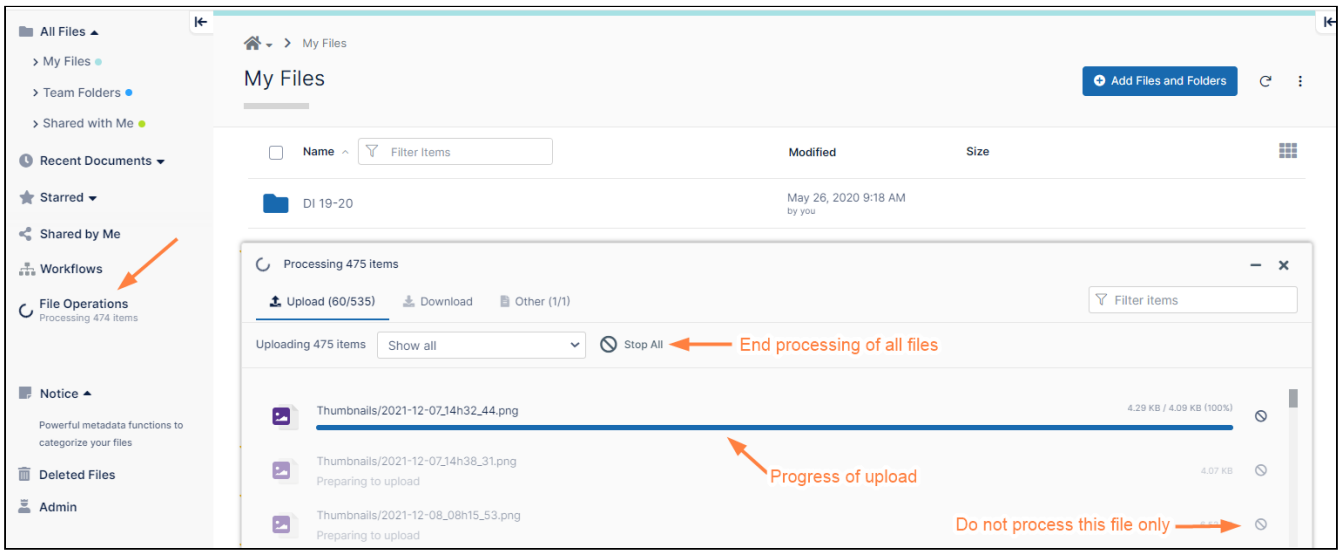


Notice - This section shows a revolving news feed of information about FileCloud or your company.

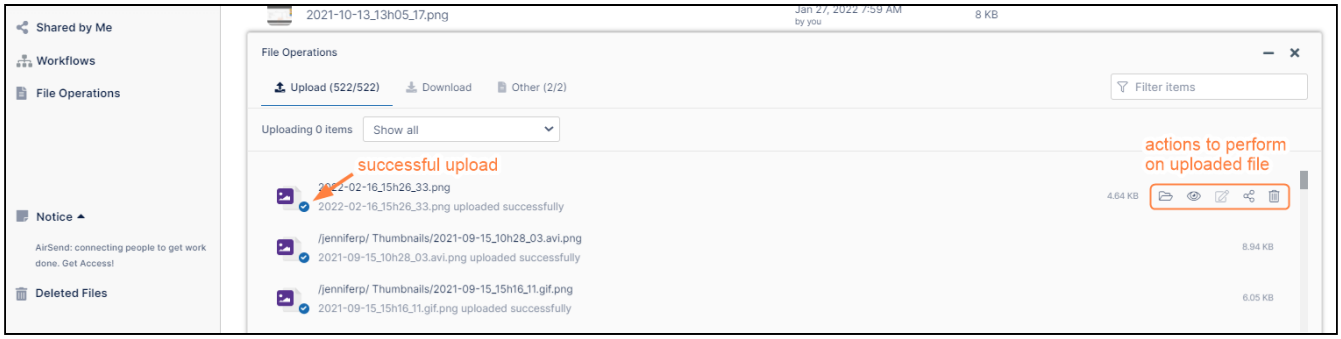
Deleted Files - Click **Deleted Files** to view files and folders that you have marked for deletion. From **Deleted Files** you can restore or permanently remove deleted items. For more information, see Delete Items and Perform Actions on Deleted Items.

File Operations Window

When you click the **File Operations** link in the navigation pane, a window opens and overlays the bottom half of the screen.
The window shows the progress of actions as they occur on files and folders in FileCloud.
Click the **Stop All** icon above the list of files being uploaded to stop all activity. Any uploads or downloads that have already been completed remain.
Click the **Stop icon** in the row for an upload to stop that file from uploading only.



Once the action is complete the window shows each file or folder overlaid with a check or x that indicates if the action succeeded or failed. For files, a list of action icons for choosing the next action on the file appears. Possible next actions are **Open in Folder**, **Preview**, **Edit**, **Share**, and **Delete**.



The window includes separate tabs for displaying **Upload**, **Download**, and **Other** actions. **Other** includes:

- Delete
- Export DRM file
- Move
- Rename
- Folder actions

Files and folders are listed in the **File Operations** window for a short amount of time after the action occurs.

To filter the items shown in the window, enter a search string in **Filter items**, or change **Show all** in the drop-down list to **Show processing** or **Show failed**.

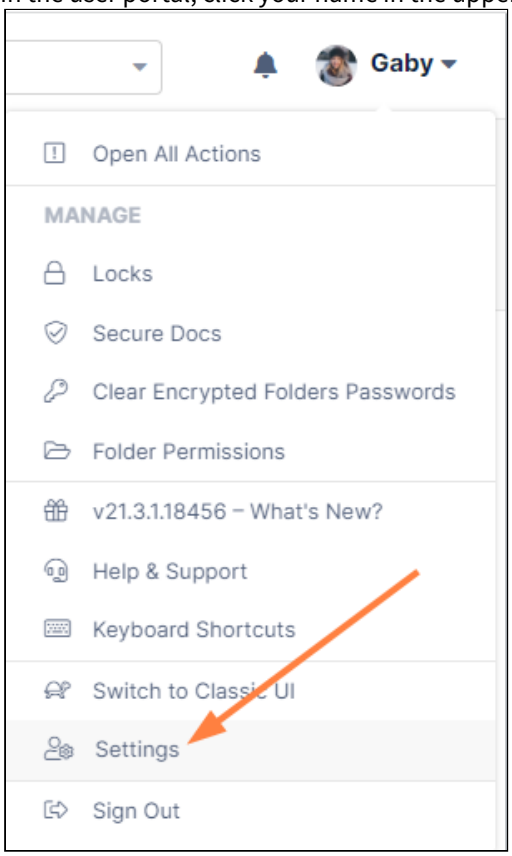
User Account Settings

You can use the FileCloud User portal to configure your user account settings.

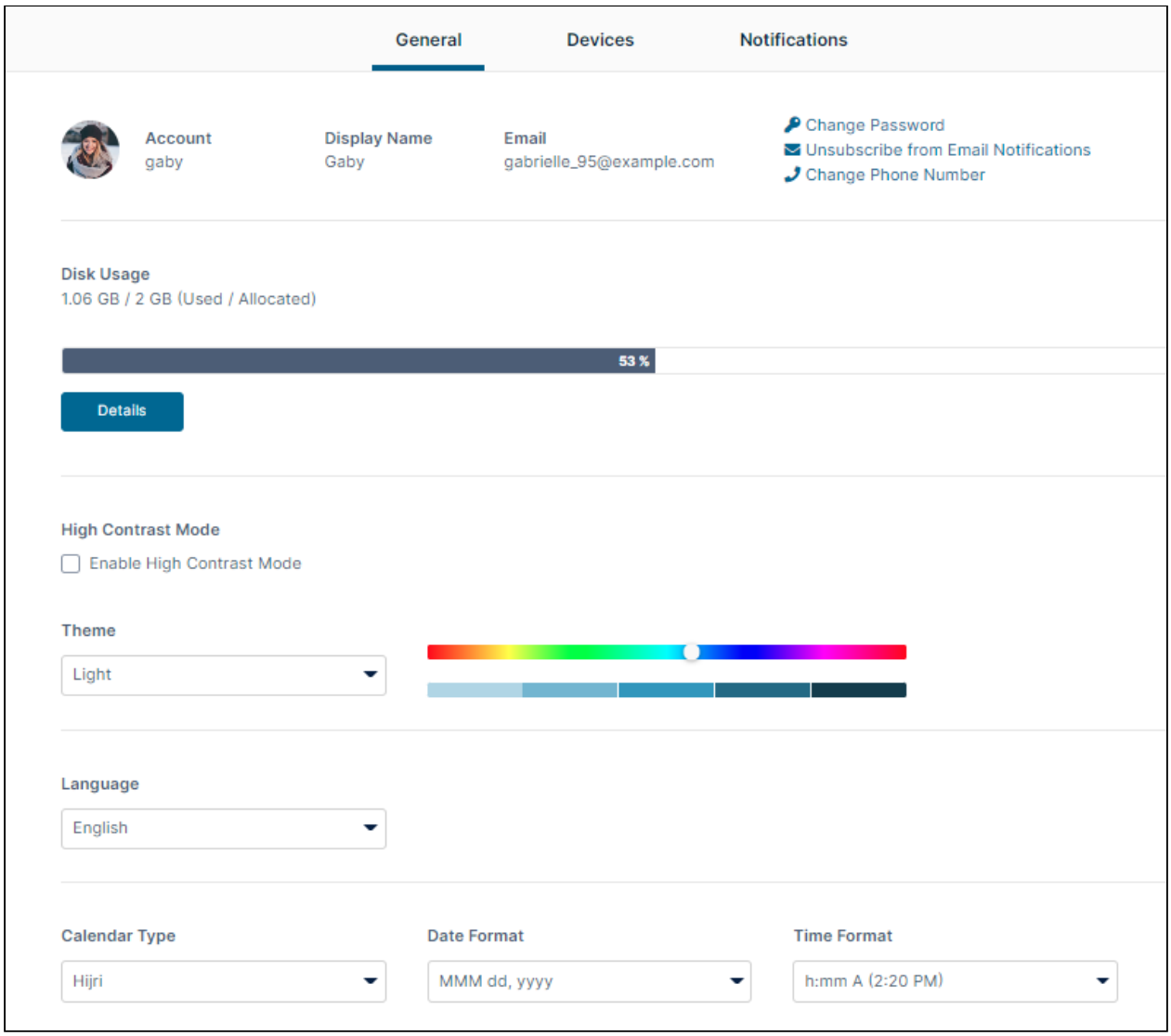
For help with notification settings, see Notifications.

To access the Settings page,

1. In the user portal, click your name in the upper-right corner of the screen and choose **Settings**.



The **Settings** page opens to the **General** tab.

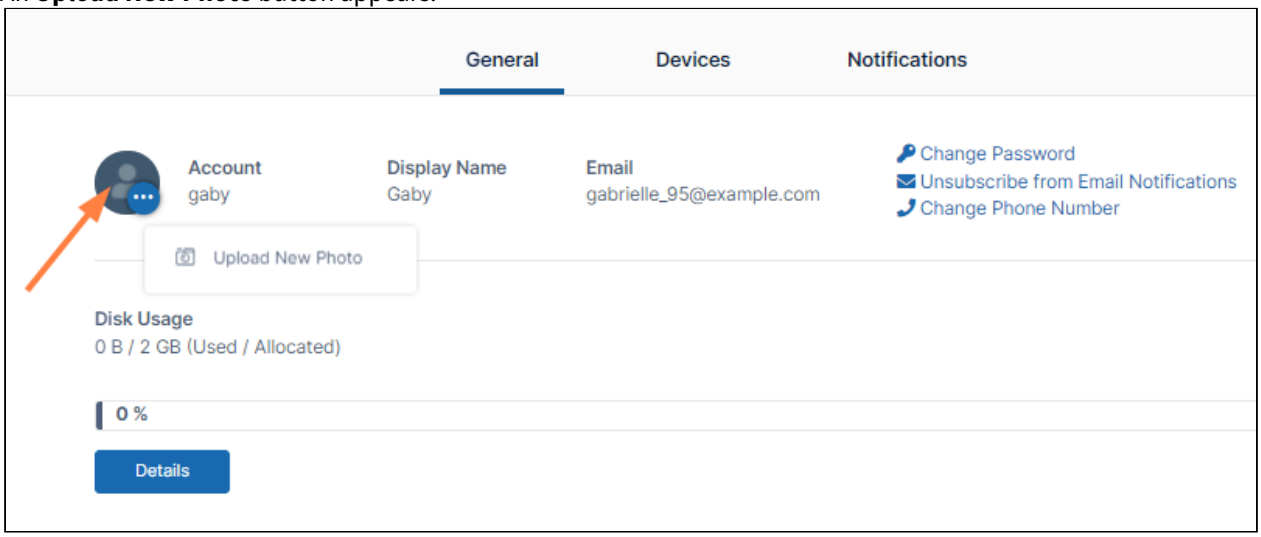


Add, Update, or Remove a Profile Image

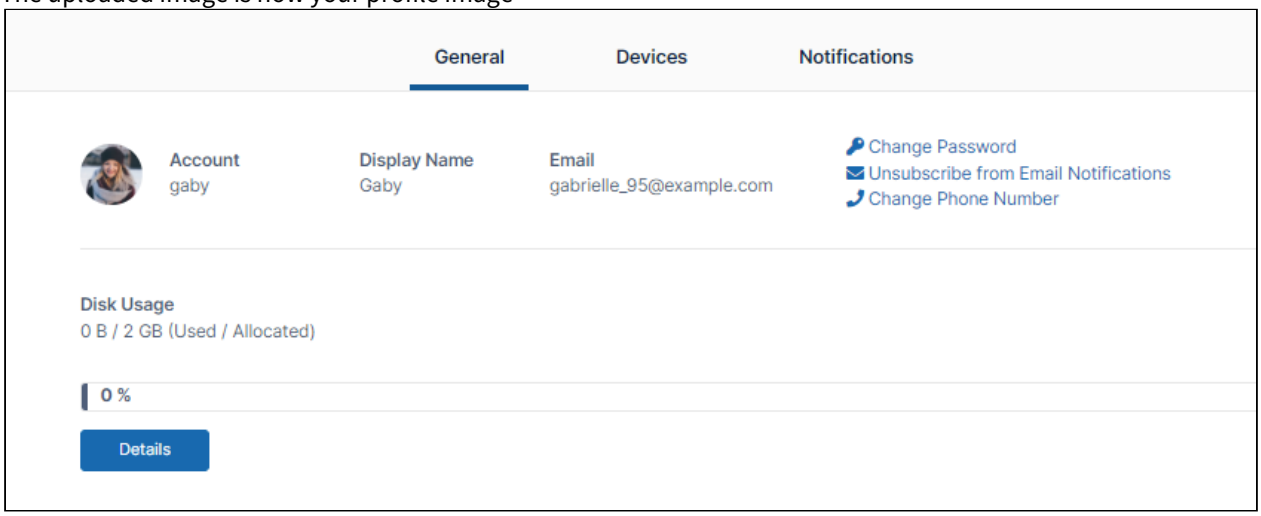
A Profile Picture is available in FileCloud Server version 15 and later.

To add or update your profile image:

1. In the **Settings** page, click the profile icon or image.
   An **Upload New Photo** button appears.



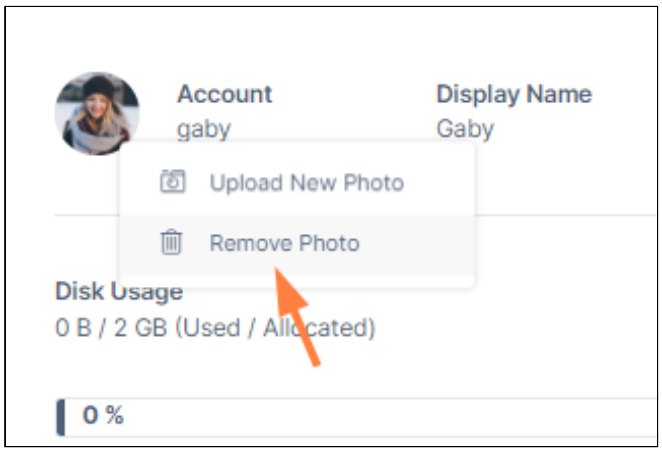
2. Click the **Upload New Photo** button.
3. Upload an image from your file system.
4. Refresh your screen.
   The uploaded image is now your profile image



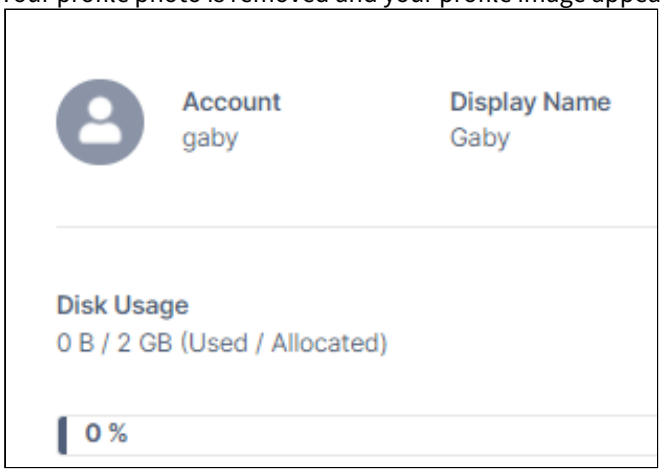
To remove your profile image:

1. In the **Settings** page, click the profile image.

2. Choose **Remove Photo**.



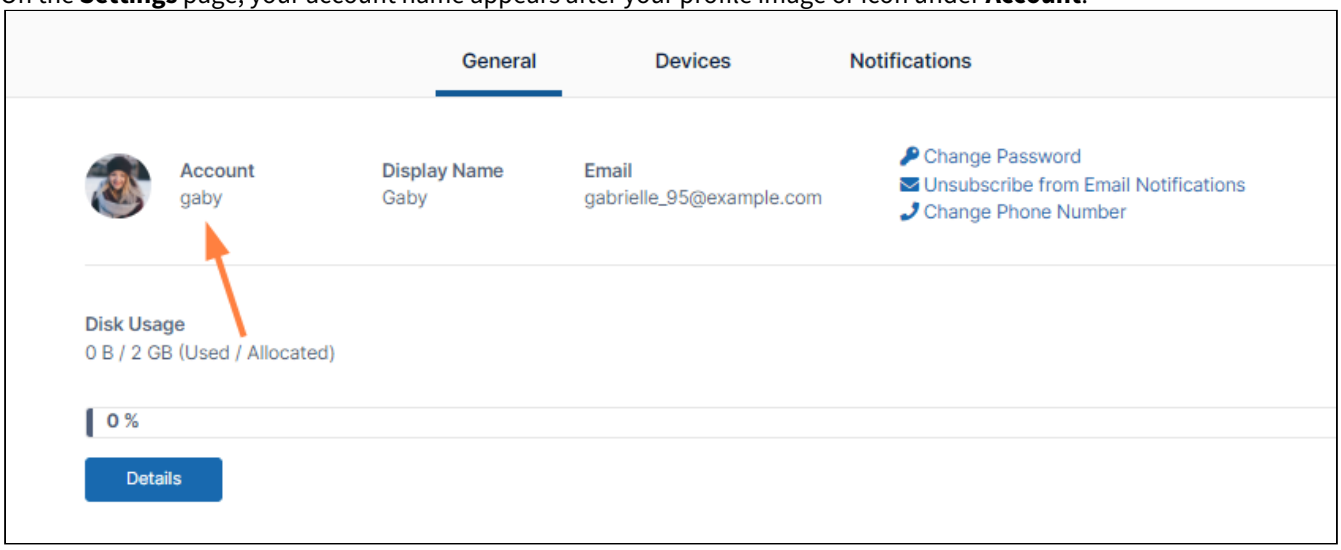
Your profile photo is removed and your profile image appears as:



View your Account Name

Your account name is the name you log in with. It may not be the same as your display name, which appears in the upper-right corner of the FileCloud screen.

On the **Settings** page, your account name appears after your profile image or icon under **Account**.

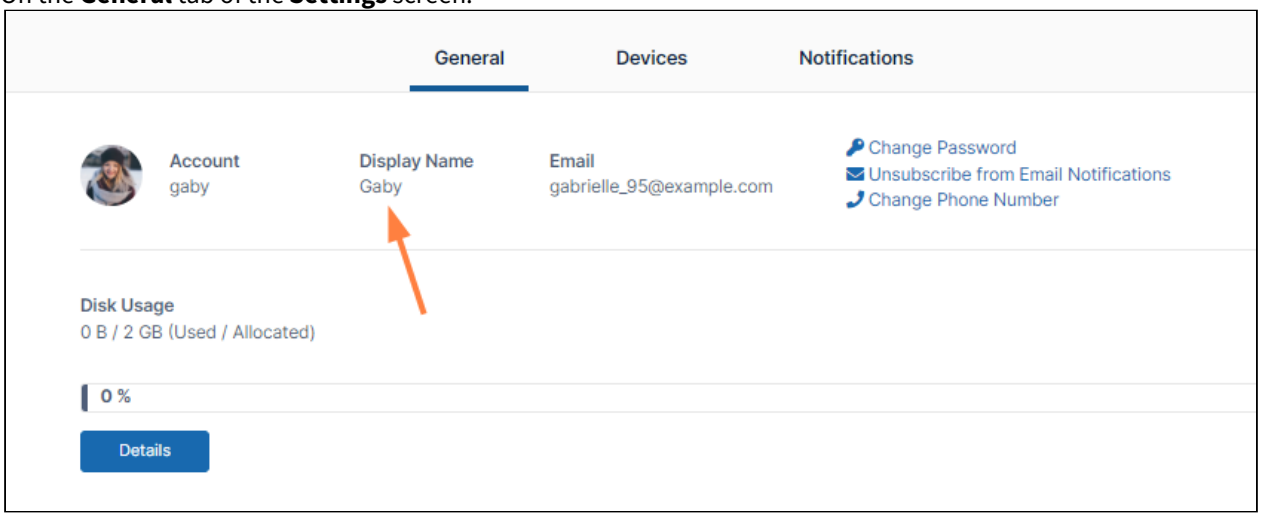


Only an Administrator can change your account name.

View Your Display Name

By default your display name is the same as your account name and appears in the following places:

- The upper-right corner of the FileCloud screen.
- On any FileCloud email notifications
- On the **General** tab of the **Settings** screen.



Only an Administrator can change your Display Name.

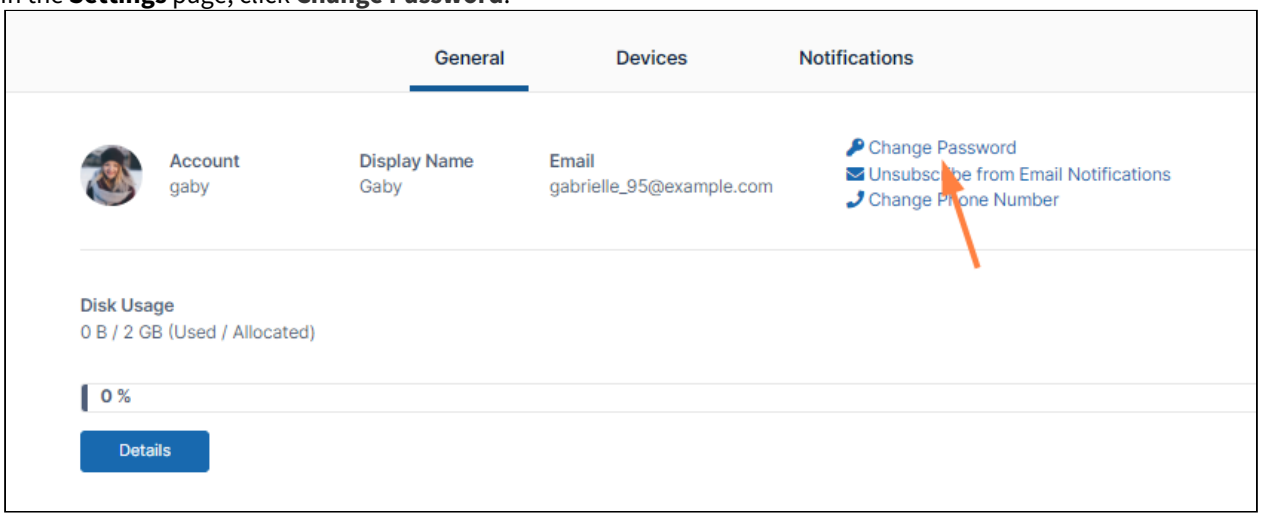
Change your Password

A good security policy includes changing your password often.

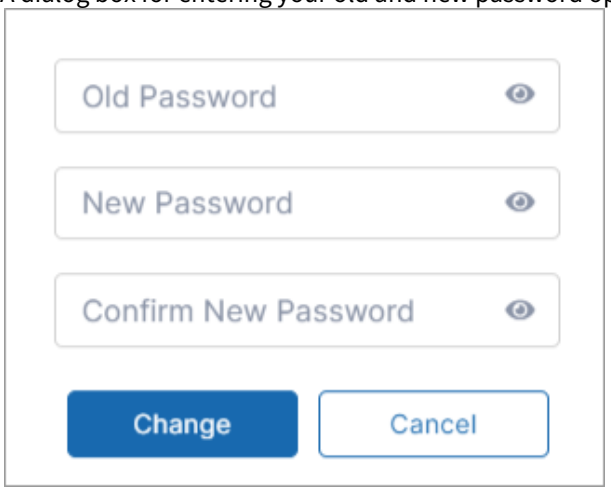
These instructions require you to know your old password.

To change your password:

1. In the **Settings** page, click **Change Password**.



A dialog box for entering your old and new password opens.



2. Type in your old password, your new password, and then retype your new password.
3. Click **Change**.

AD and LDAP users and users created via SSO cannot change their passwords. Beginning with FileCloud 20.2, the **Change Password** option does not appear for these users.

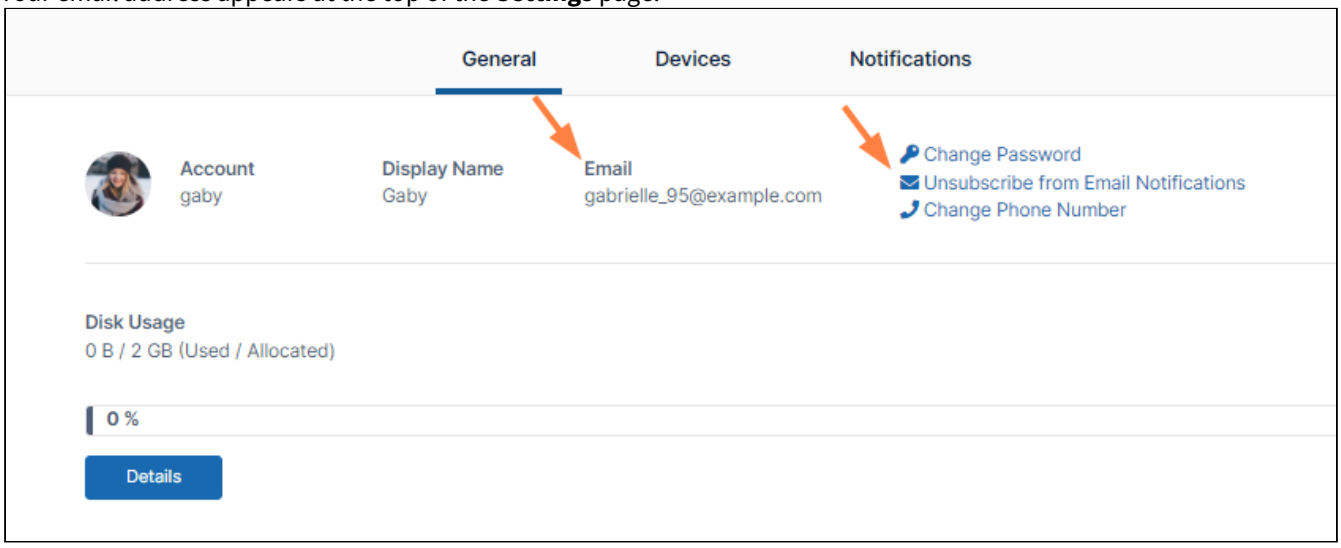
If you have forgotten your password, see Reset a Forgotten Password.

Manage Your Email Settings

In the User portal you can:

- View your email address. This is where all FileCloud notifications are sent. Only an Administrator can change this setting.
- Unsubscribe from the mailing list.

Your email address appears at the top of the **Settings** page.

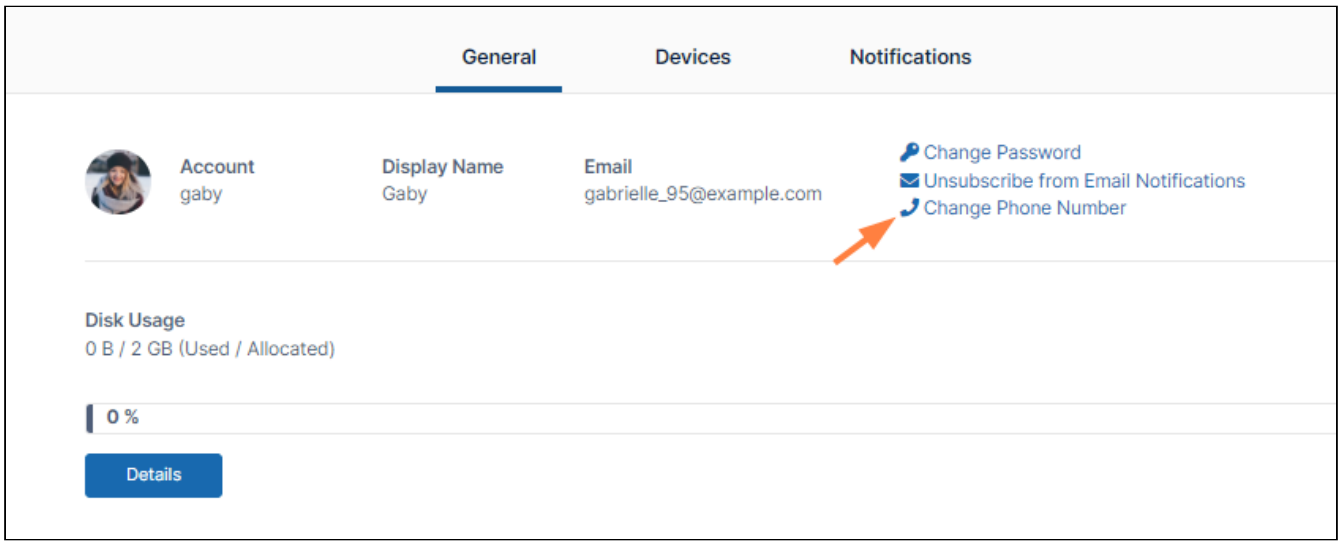


To unsubscribe from email notifications:

1. In the top row of the **Settings** page, click **Unsubscribe from Email Notifications**.
2. A dialog box prompts you to confirm.
3. Click **OK**.
   The link now appears as **Subscribe to Email Notifications**. If you want to resubscribe to notifications, click the link.

Change your Phone Number

To receive text messages from FileCloud, your phone number must be entered into the system.
If your admin has given you permission, you may add or change your phone number in the **Settings** page. Click **Change Phone Number**, and enter or modify the phone number.

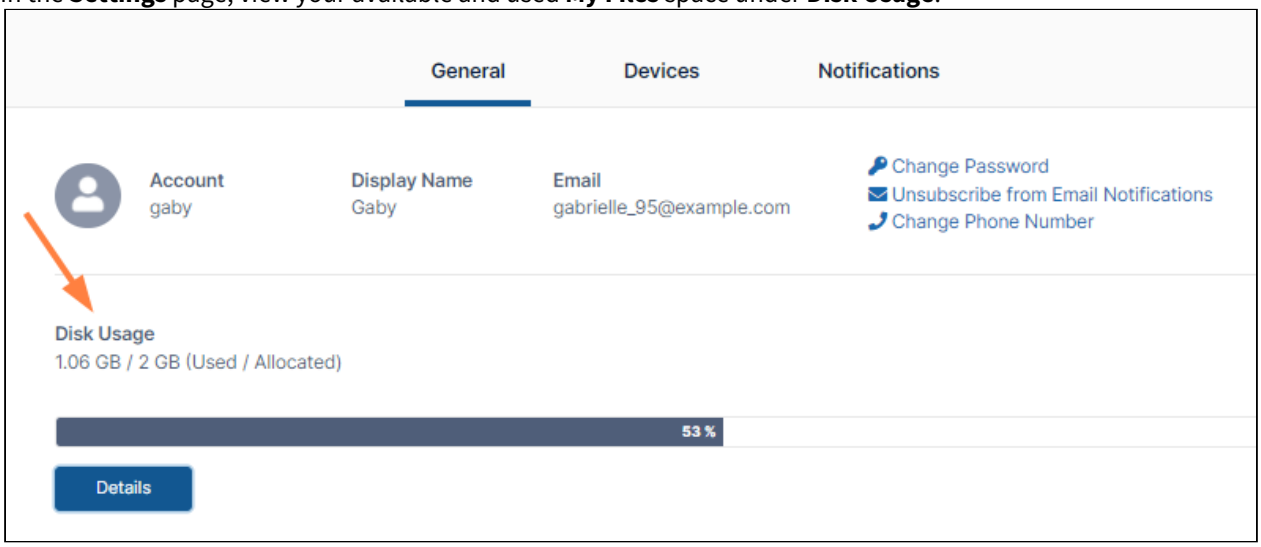


Admins: To enable users to add or change there phone numbers, see **User Settings** on the page The Misc. Tab Settings.

View How Much Space You Have Used

To view how much of your My Files space you have used:

1. In the **Settings** page, view your available and used **My Files** space under **Disk Usage**.



   The bar below your used/allocated space shows the percent of your allocated space that you have used.
2. Click the **Details** button to view details about the files and folders stored in your My Files space.

3. Click the eye icon in the **Deleted Files** row to view your deleted files.
   If you have deleted files, an x appears next to the eye icon.
4. Click the x to clear the deleted files from your disk.

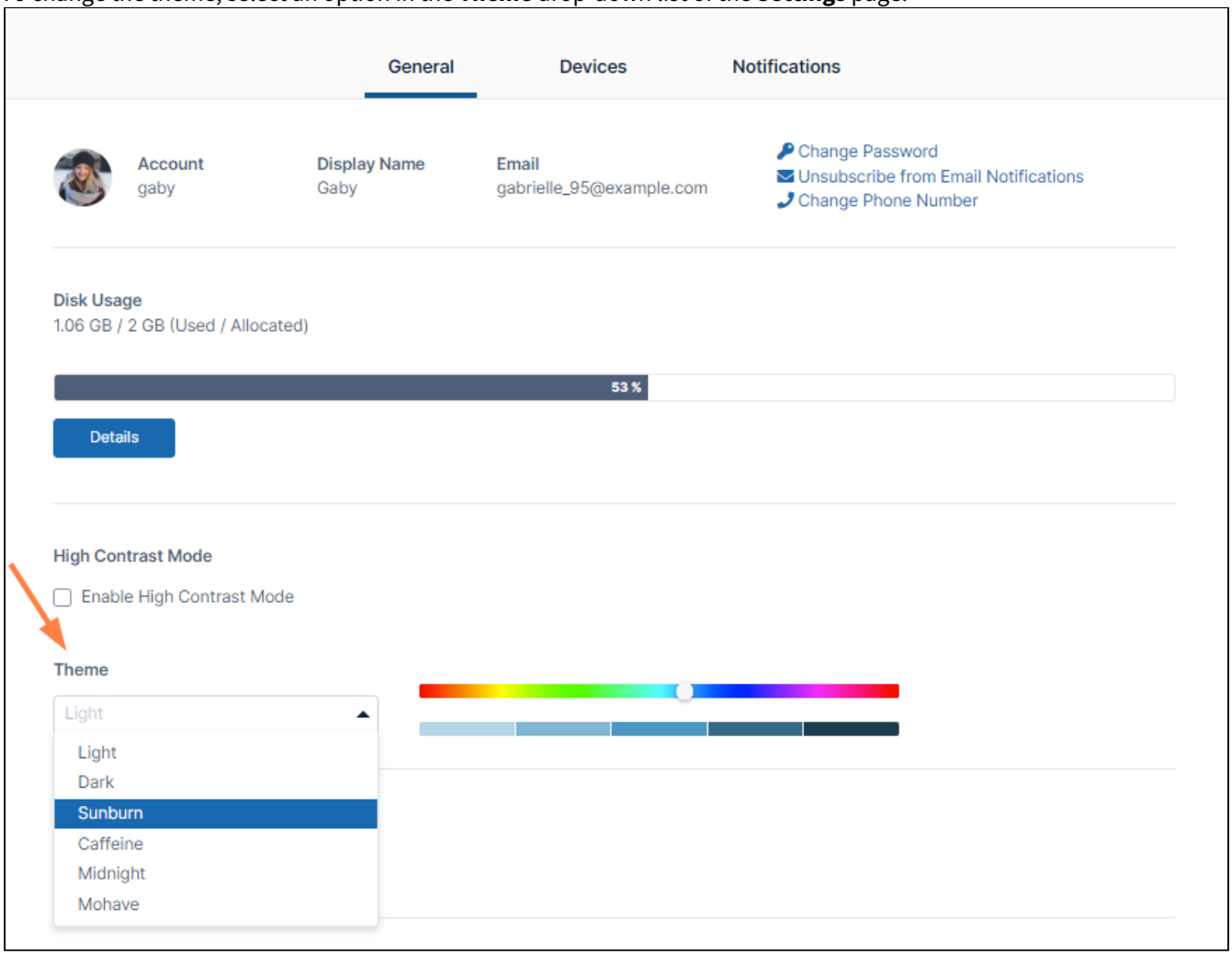
Only an Administrator can allocate disk space for you to use.

Change your Theme

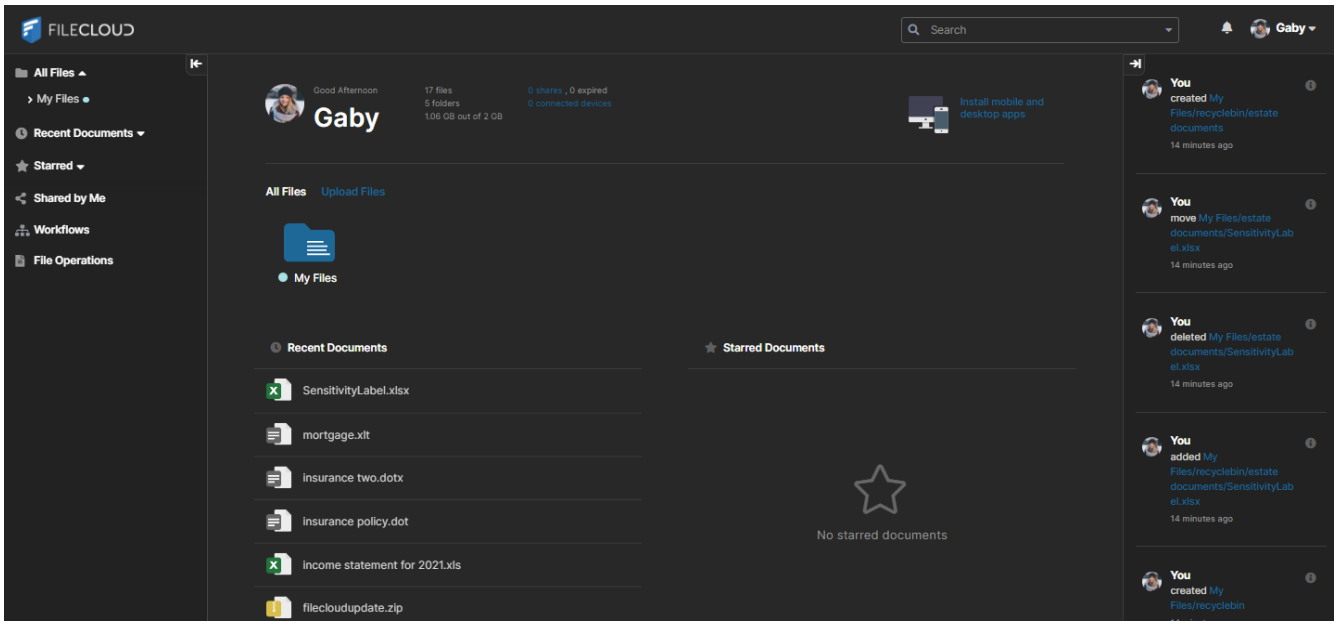
Beginning with FileCloud Version 20.2, you can choose a light or dark theme, select your own color for main features in the user interface, and view your user interface in high contrast mode.
Beginning with FileCLoud Version 20.3, you can choose one of our custom themes.

Theme

By default the user portal uses the light theme, but you can change to the dark theme or a custom theme.
You can preview all currently available themes at User Portal Themes.
To change the theme, select an option in the **Theme** drop-down list of the **Settings** page.

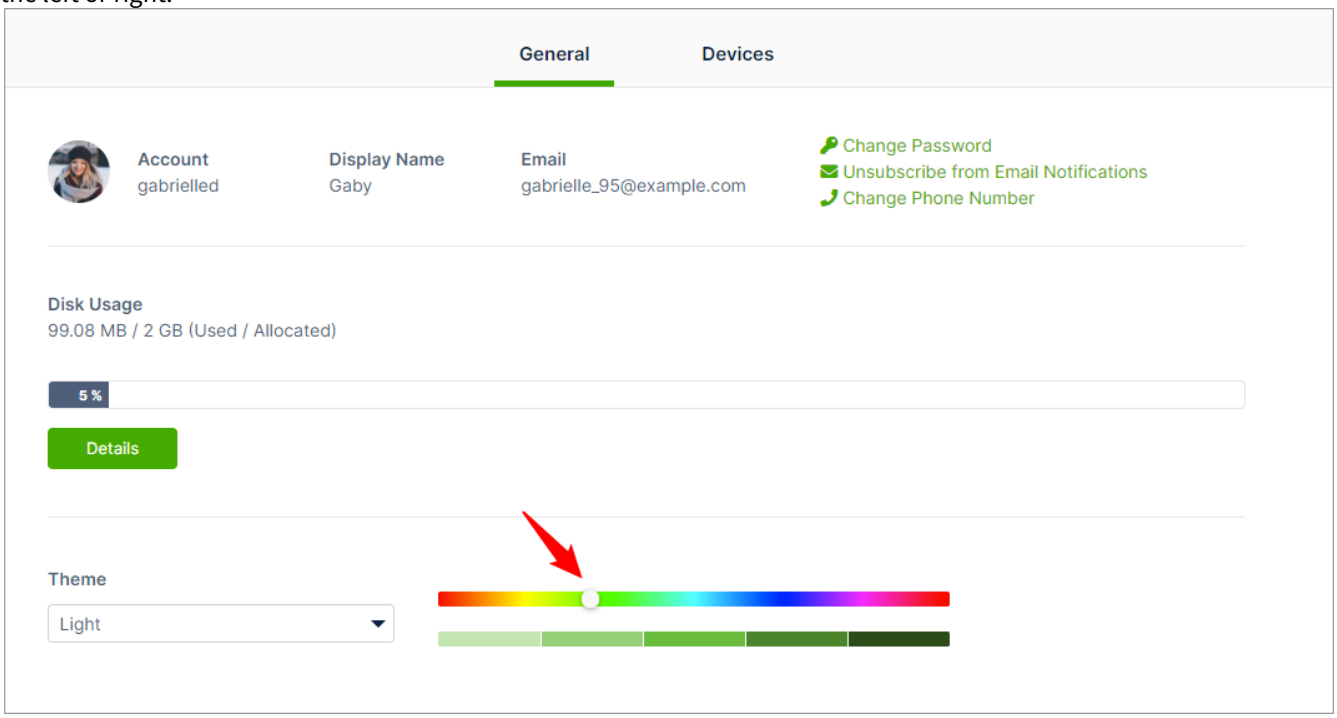


The FileCloud user portal viewed with the dark theme:

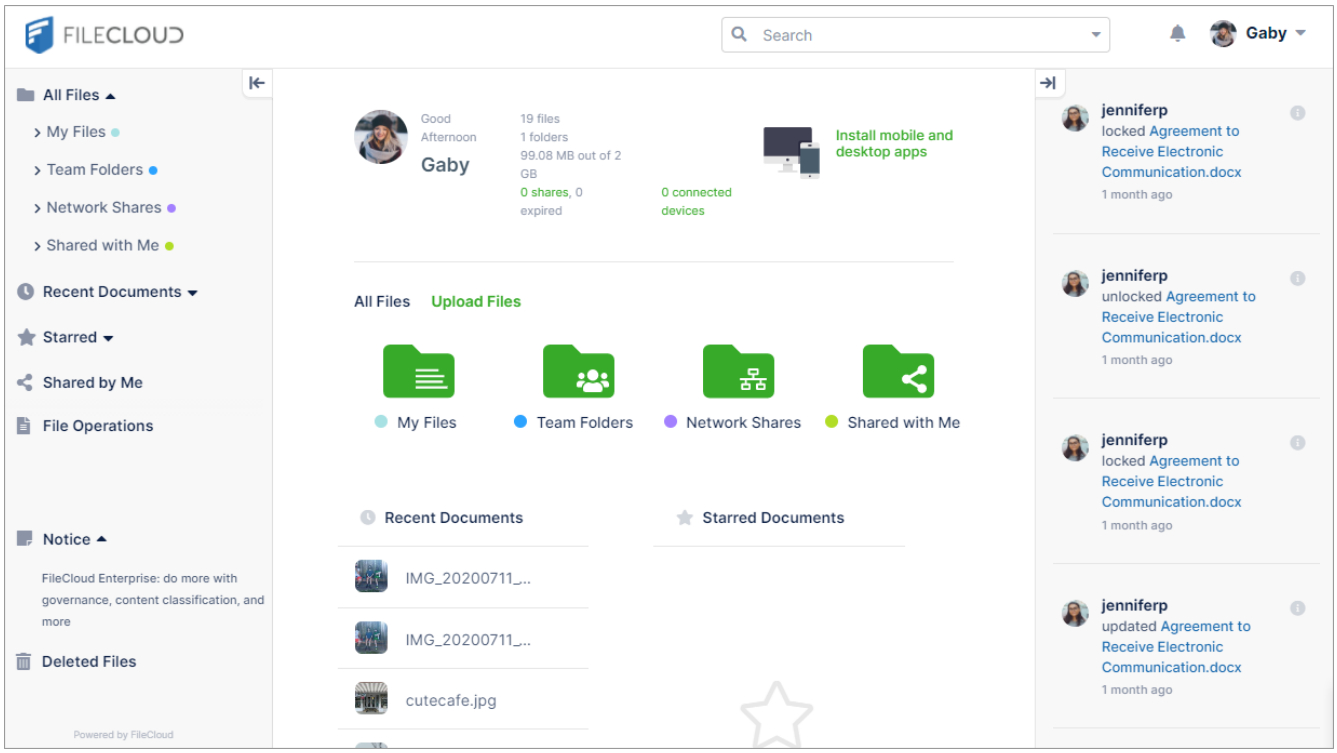


Color

By default, the main features in the user interface are a blue. To change their color, move the slider on the color bar to the left or right.

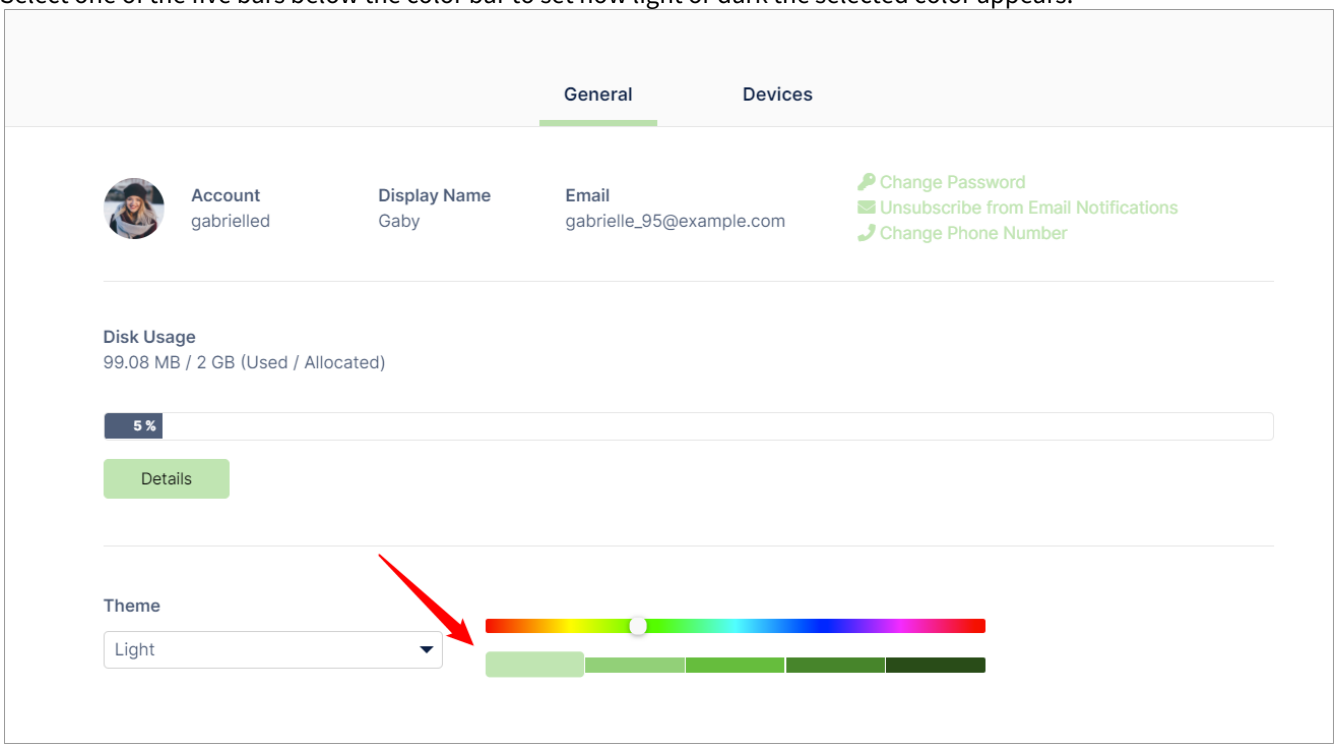


The FileCloud user portal viewed with green features:

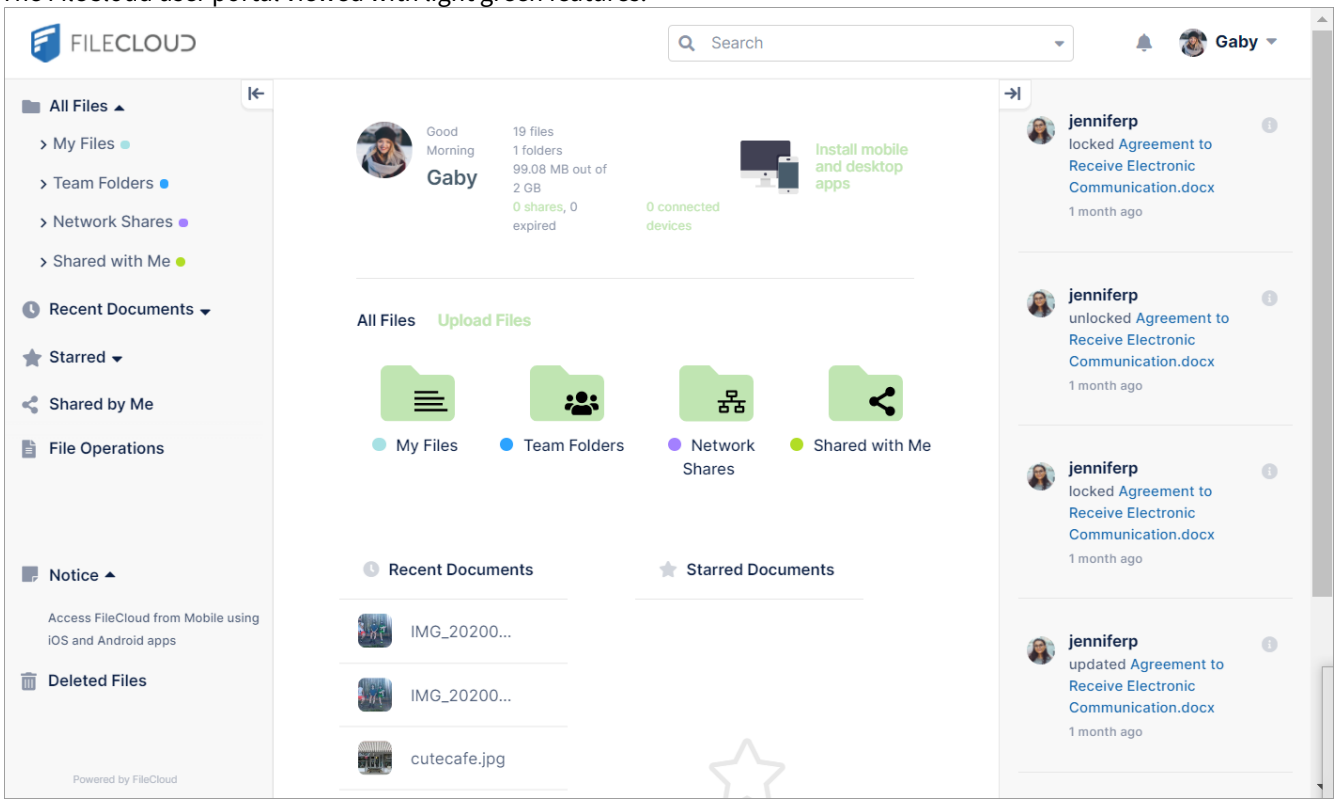


Shade of color

Select one of the five bars below the color bar to set how light or dark the selected color appears.

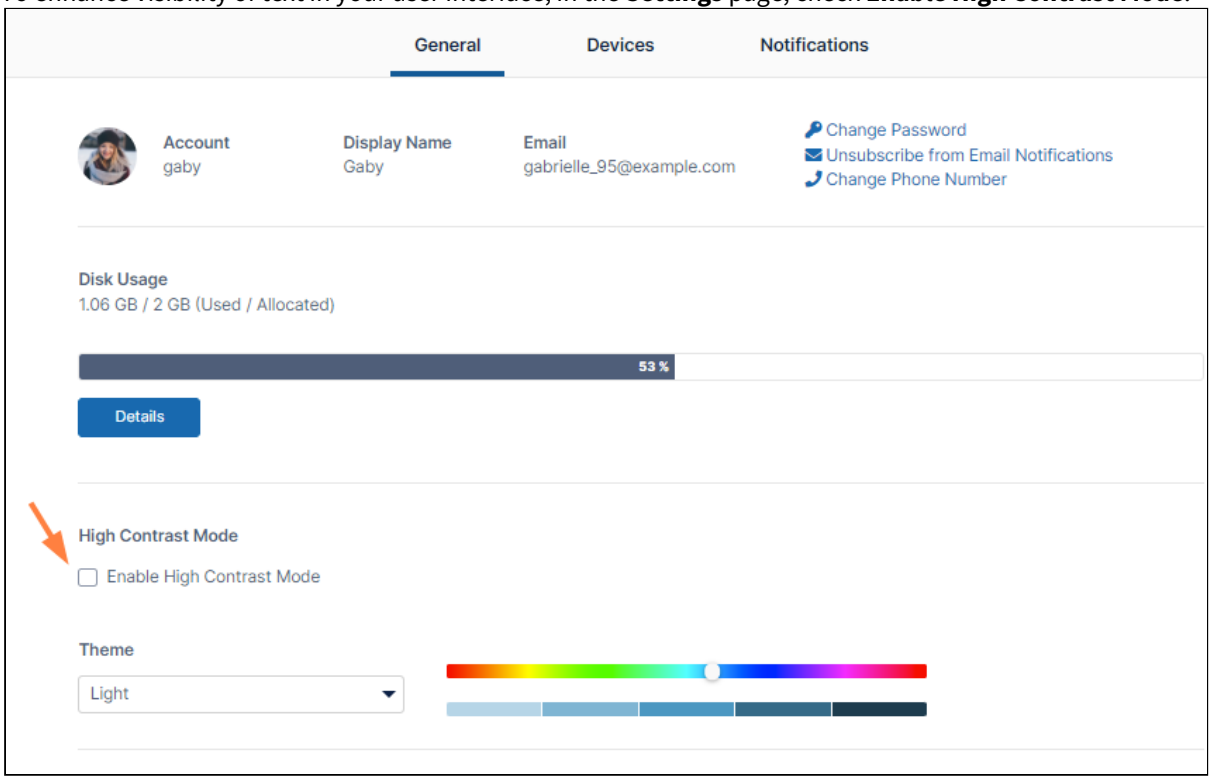


The FileCloud user portal viewed with light green features.

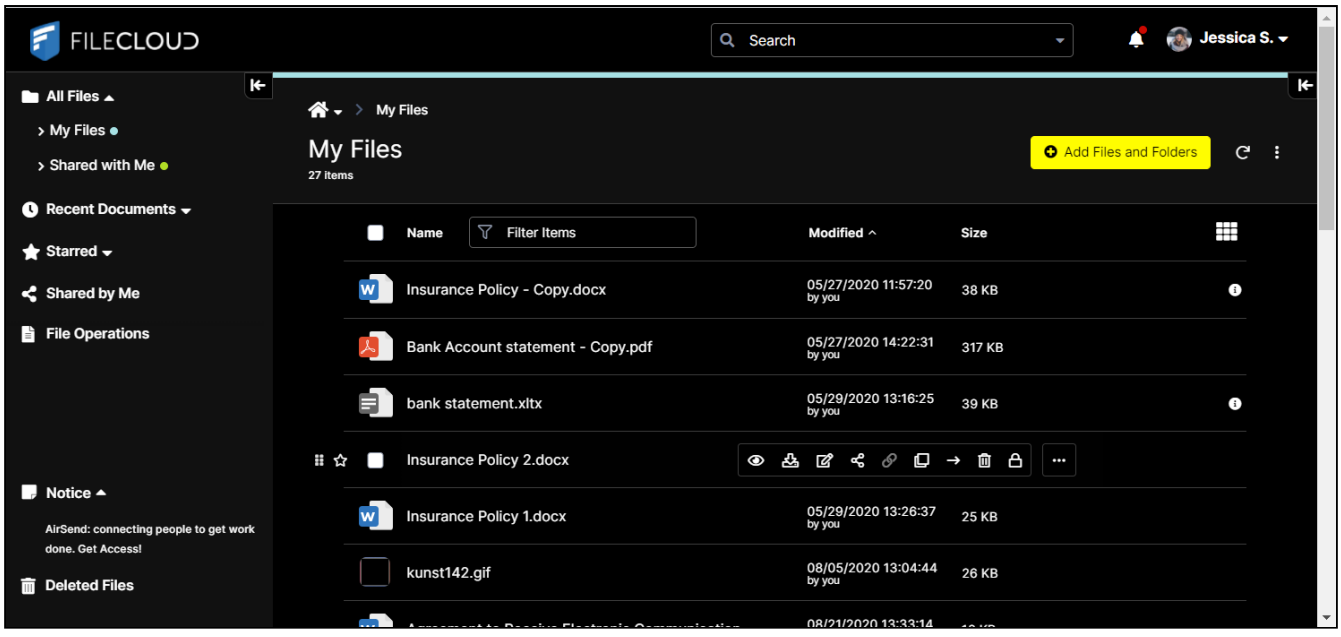


High Contrast Mode

To enhance visibility of text in your user interface, in the **Settings** page, check **Enable High Contrast Mode**.



In high contrast mode, the user interface appears with the following theme:

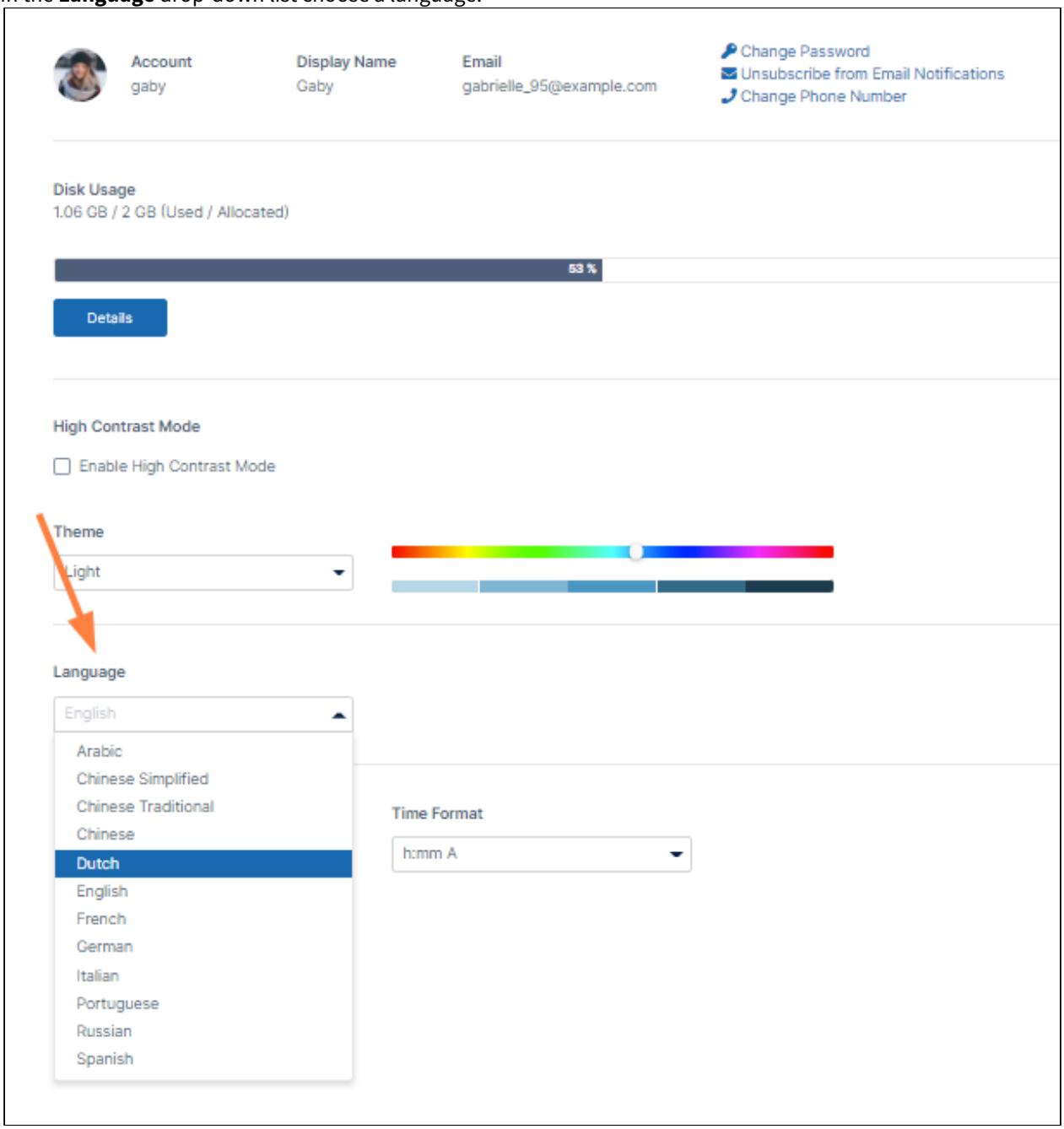


Change Your Display Language

If you change this setting, the labels on all screens in the User Portal appear in the selected language.

To change your display language:

1. In the user portal, click your name in the upper-right corner of the screen and choose **Settings**. The **Settings** page opens to the **General** tab.
2. In the **Language** drop-down list choose a language.



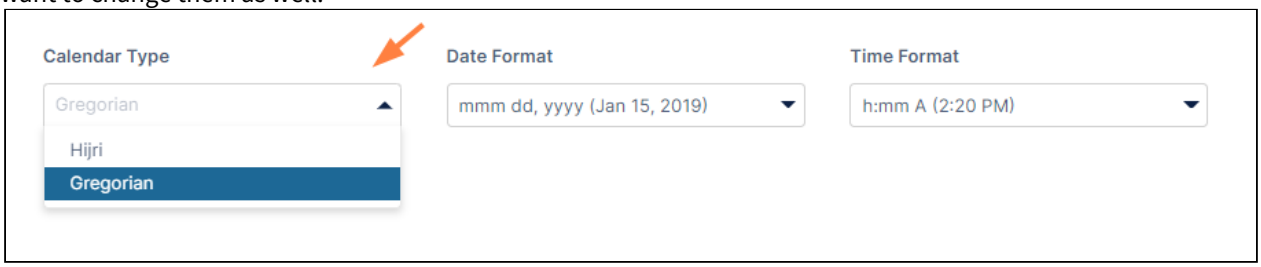
You are not asked to confirm this change. As soon as you select a language, the screen refreshes in the chosen language.

Change your Date and Time Formats

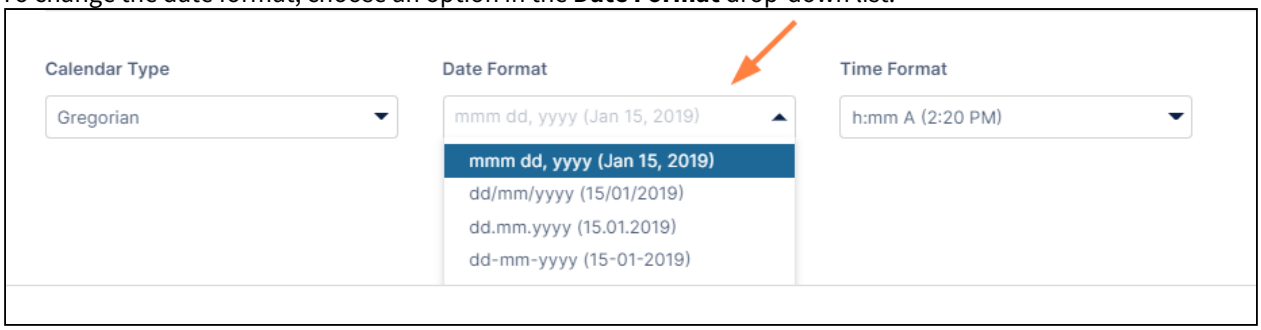
The default date and time formats you see in FileCloud are set by your administrator. However, you can change them on the **Settings** page by choosing different options in the **Calendar Type**, **Date Format** and **Time Format** drop-down lists.

Choices for **Calendar Type** are **Gregorian** (English) and **Hijri** (Islamic). The date and time formats change depending on whether you choose **Gregorian** or **Hijri.**

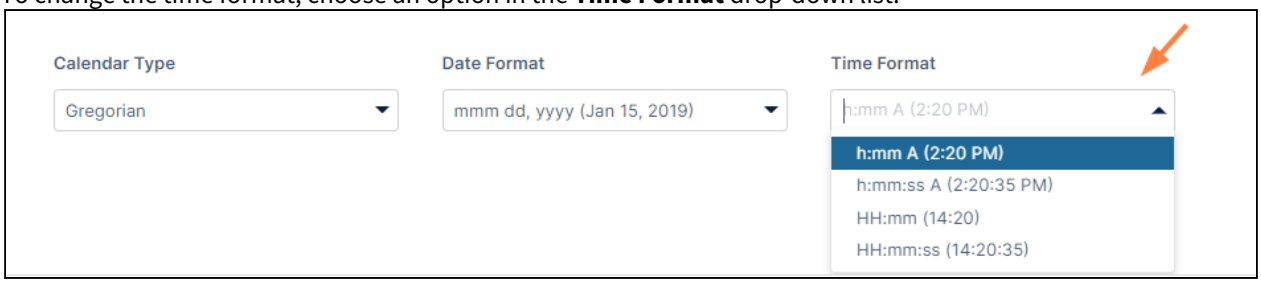
- To change the calendar type, choose an option in the **Calendar Type** drop-down list.
  The **Date Format** and **Time Format** change to the default value for your **Calendar Type** choice, so you may want to change them as well.



- To change the date format, choose an option in the **Date Format** drop-down list.



- To change the time format, choose an option in the **Time Format** drop-down list.



Manage your Devices

> This tab does not appear in the user interface for External users.

This **Devices** tab of the **Settings** page provides options for managing your connected devices and removing them if needed.

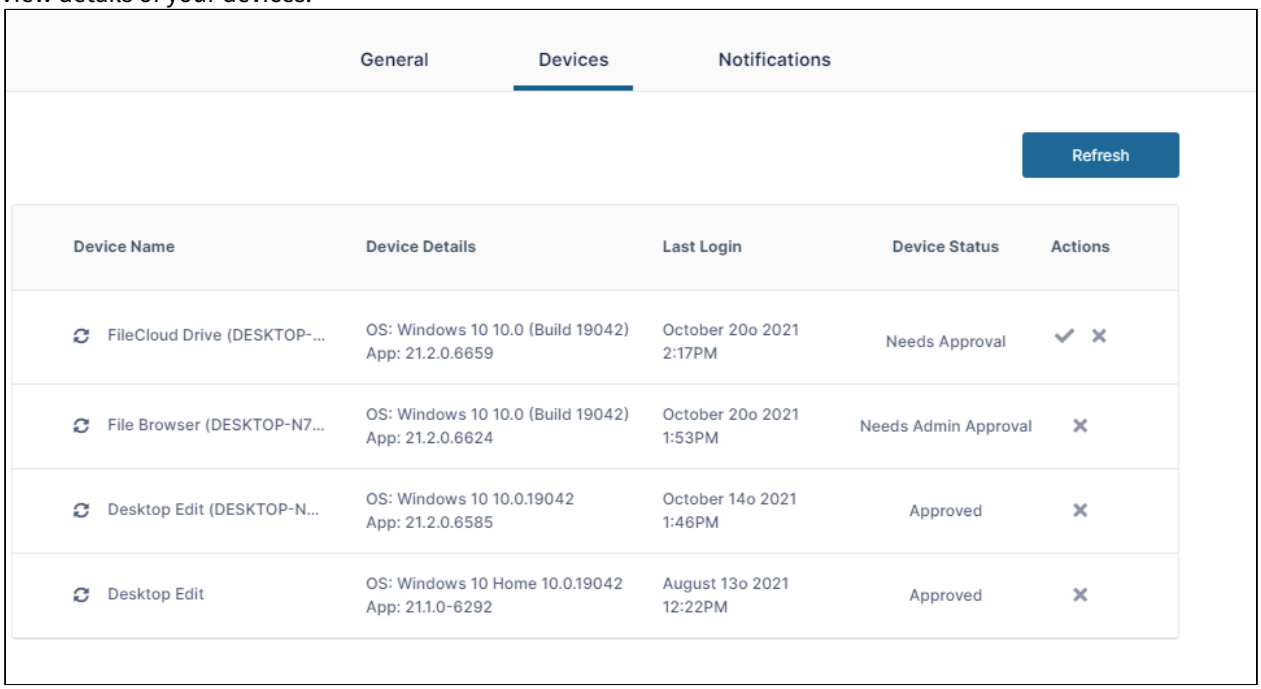
Devices can use the following clients to log in to a FileCloud Server site:

- FileCloud iOS App
- FileCloud Android App

- FileCloud Windows Store App
- FileCloud Sync
- FileCloud Drive
- FC Outlook Add-in
- FC Office Add-in
- FC Desktop Edit
- FC File Browser

To view your devices:

1. In the user portal, click your name in the upper-right corner of the screen and choose **Settings**.
   The **Settings** page opens to the **General** tab.
2. Click the **Devices** tab.
   View details of your devices.



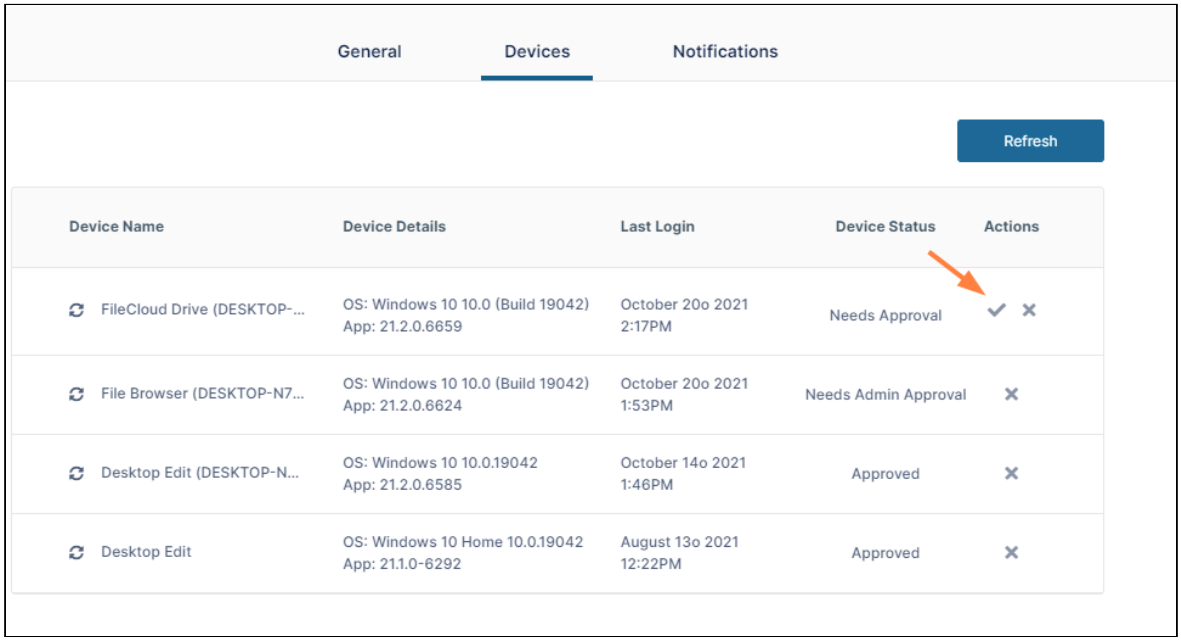
Device Status

Device Status	Description
Approved	The device is available for you to log in to and use.
Needs Admin Approval	The device is waiting for your Admin to approve it. You cannot currently log in and use it. After your Admin approves the device, its **Device Status** either changes to **Approved**, enabling you to log in and use it, or changes to **Needs Approval**, requiring you to approve it, and then enter a device authentication code before you can use it (see below).

Needs Approval	The device is waiting for you to approve it. Once you approve it, you must enter a device authentication code to log in and use the device (see below).

To get the authorization code for a device:

1. When you log in through a device, you may be required to enter an authorization code.
   To get the authorization code you must approve the device on the Devices tab.
   1. Log in and access the **Devices** tab.
   2. The **Device Status** column displays **Needs Approval** if it needs your approval.
   3. Click the check for the device under **Actions**.



   A dialog box with the authorization code opens.
   4. Enter the authorization code into **Enter Code** on your device.

For help using the Notifications tab, see Notifications.

User Alerts

> The ability to unsubscribe from alerts is available in FileCloud version 17.3 and later.

You are automatically alerted in real-time when changes occur to your files.

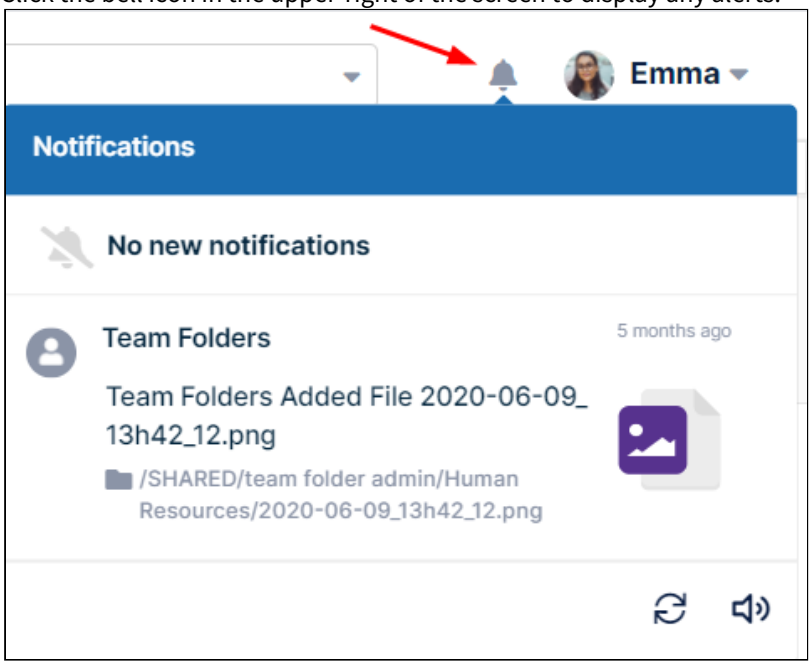
You are also notified when:

- You are identified in comments with @username
- Shared folder access changes
- A system-level alert is sent

FAQs

Where do I see the alerts?

- Click the bell icon in the upper-right of the screen to display any alerts.



- You will also receive an email message for each notification.

Can I unsubscribe from these notifications?

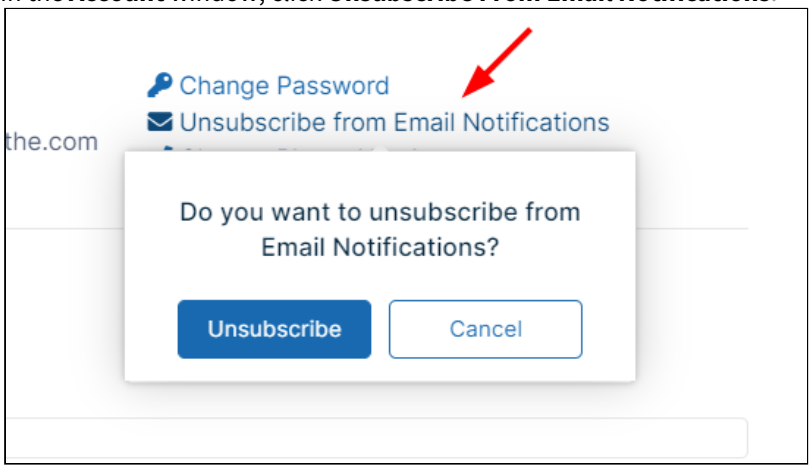
Yes, you can opt out of the email notifications.

If there are a large number of changes and you are seeing too many email notifications, you can unsubscribe from the notifications.

To unsubscribe:

1. In the user portal, click your name in the upper-right corner of the screen and choose **Settings**.
   The **Settings** page opens to the **General** tab.
2. Click the **Account** tab.

3. In the **Account** window, click **Unsubscribe From Email Notifications**.



A dialog box prompts you to confirm.

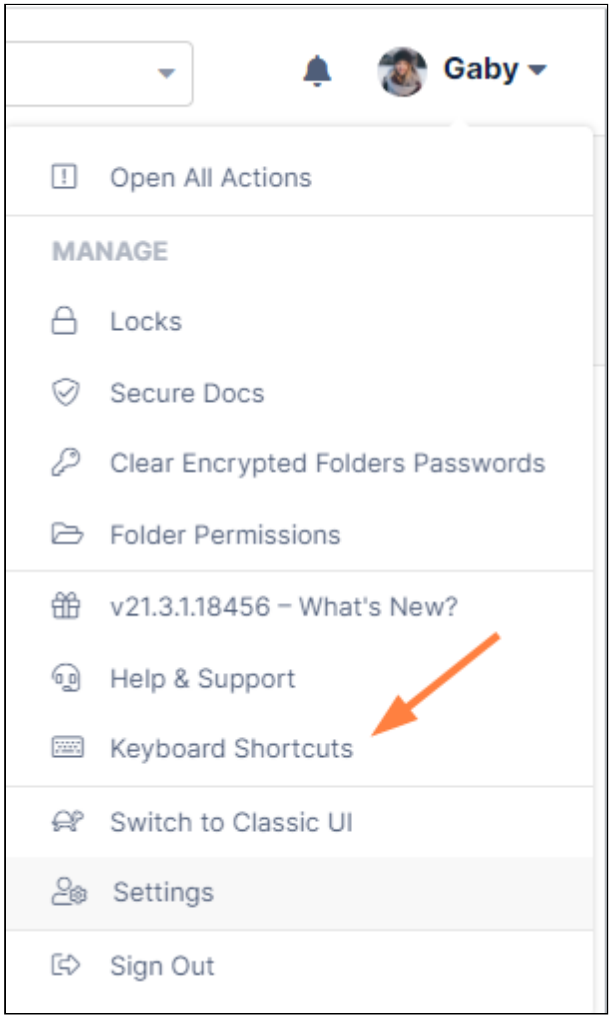
4. Click **Unsubscribe**.

Keyboard Shortcuts

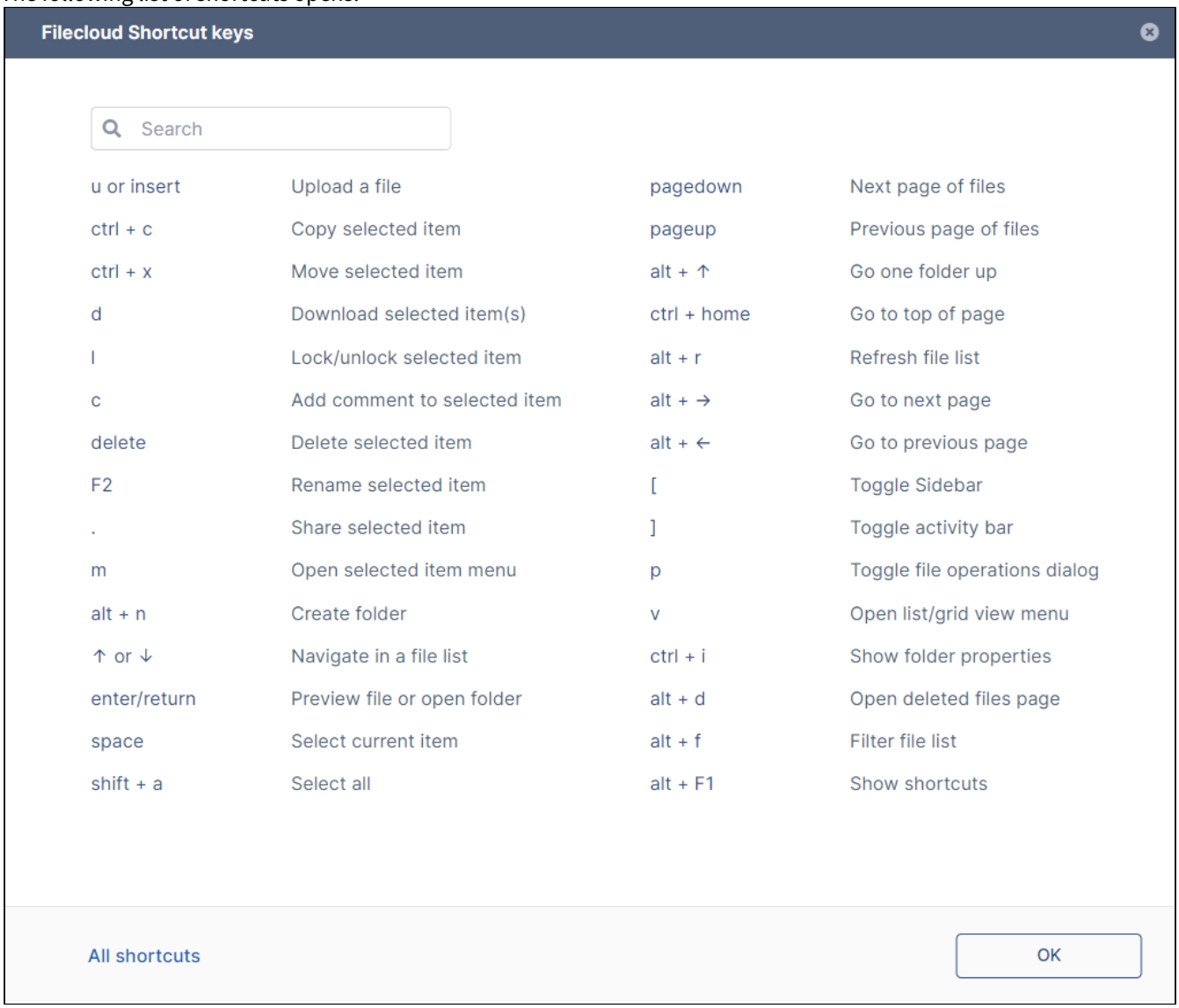
User Interface shortcuts

The FileCloud user interface includes a number of keyboard shortcuts for performing actions.

While you are working in the user interface, to view the list of shortcuts, click your username, and choose **Show Shortcuts**.



The following list of shortcuts opens:



For more information about the keyboard shortcuts, see Guide to Keyboard Shortcuts.

Guide to Keyboard Shortcuts

Beginning with FileCloud 21.1, all FileCloud actions can be completed using keyboard shortcuts. This makes FileCloud fully compliant with VPAT Guideline 2.1, Keyboard Accessible. For more information, see https://www.w3.org/TR/WCAG21/#keyboard-accessible.

Open Shortcut Reference

Windows/Linux	macOS	Description
Alt + F1	Option + F1	Show shortcuts.

Select a File or Folder

Windows/Linux	macOS	Description
Shift + a	Shift + a	Select/deselect all files and folders on page.
Space	Space	(Use when navigating list with arrow keys) Select/deselect current file/folder. **Version 21.1+**

File and Folder Actions

To perform most of the following file or folder actions, you must select the file or folder first. Use one of the methods shown above under **Select a File or Folder**, or check the box next to the file or folder.

Windows/ Linux	macOS	Description
Shift + a	Shift + a	Select/deselect all files and folders on page.
Space	Space	(Use when navigating list with arrow keys) Select/deselect current file/folder. **Version 21.1+**
Enter/Return	Enter/Return	Preview selected file or open selected folder.
d	d	Download selected file/folder.
l	l	Lock/unlock selected file/folder.
c	c	Add comment to selected file/folder.
m	m	Open selected file/folder. **Version 21.1+**
Delete	Delete	Delete selected file/folder.

Windows/ Linux	macOS	Description
F2	F2	Rename selected file/folder. **Version 21.1+**
. (period)	. (period)	Share selected file/folder. **Version 21.1+**
u or Insert	u or Insert	Upload a file.
Alt + n	Option + n	Create a folder. **Version 21.1+**
Ctrl + i	Command + i	Show selected folder's properties. **Version 21.1+**
Ctrl + c	Command + c	Copy selected file/folder.
Ctrl + x	Command + x	Move selected file/folder.

Page Navigation

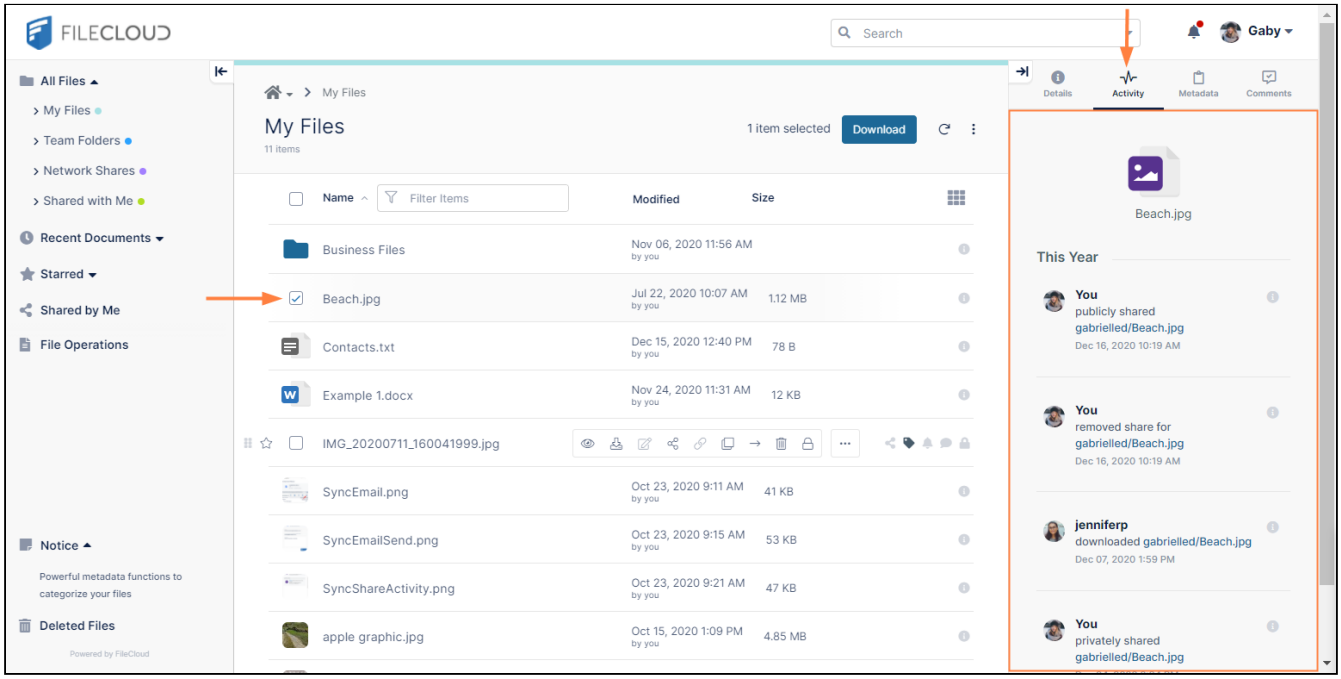
Windows/ Linux	macOS	Description
Page Down	Page Down	Move down a page in a list.
Page Up	Page Up	Move up a page in a list.
↑	↑	Scroll up items in a list. **Version 21.1+**
↓	↓	Scroll down items in a list. **Version 21.1+**
[	[	Toggle navigation bar (left sidebar).
]	]	Toggle activity bar (right sidebar).
p	p	Open/close File Operations window.
v	v	Open list view/grid view menu.
Alt + d	Option + d	Go to deleted files page. **Version 21.1+**

Windows/ Linux	macOS	Description
Alt + →	Option + →	Go to the next Web page.
Alt + ←	Option + ←	Go to the previous Web page.
Alt + ↑	Option + ↑	Move to the previous folder in the folder path.
Ctrl + Home	Command + Home	Move to the top of page.
Alt + f	Option + f	Move cursor into search box. **Version 21.1+**
Alt + r	Option + r	Refresh the list

Recent File or Folder Activities

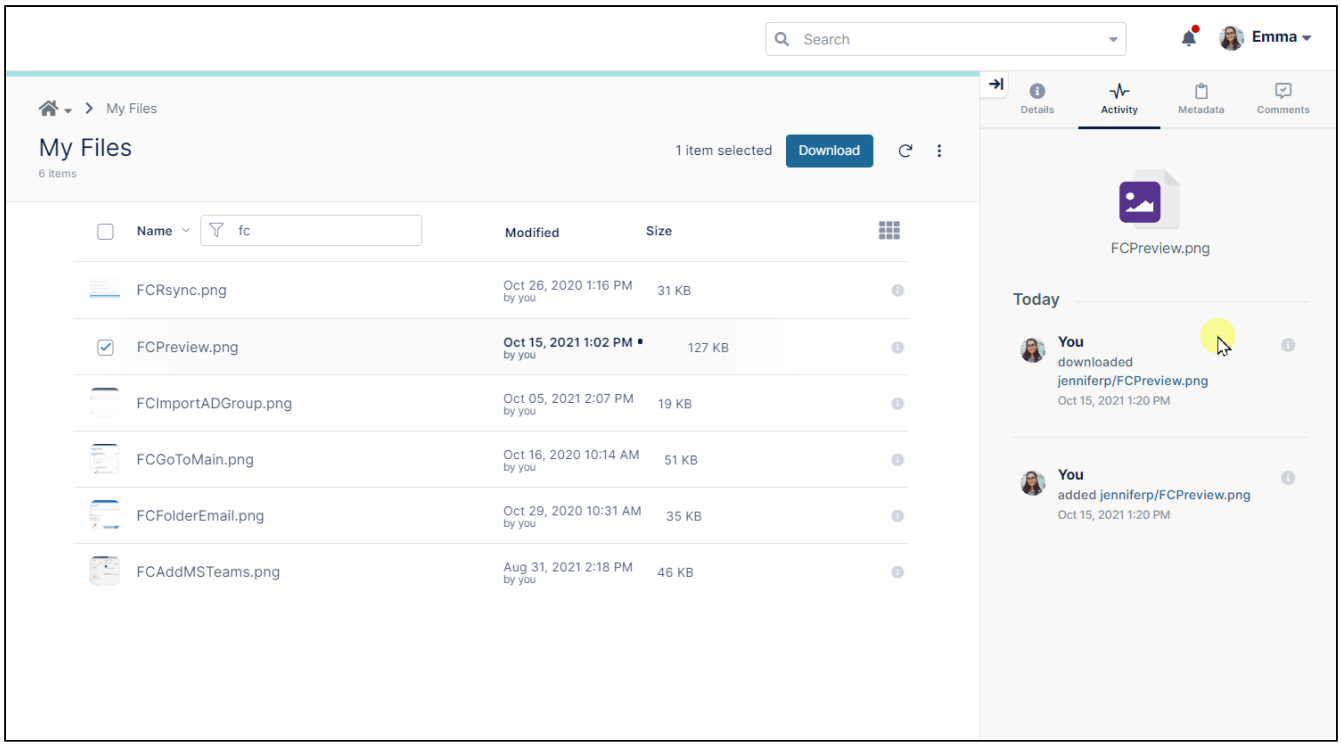
> The Activity section is available beginning with FileCloud Version 8.0
> The Activity section includes geolocation information about actions beginning with FileCloud Version 17.3.
> Admins: You can disable the **Activity** tab through a Misc. tab setting.

To view recent activities that have been performed on a file or folder, check the file or folder, and in the right panel, click the **Activity** tab.



The **Activities** section shows recent activities you or other users have performed on your files and folders and files and folders shared with you.

To view the geolocation of an action, click the Information icon for the action.

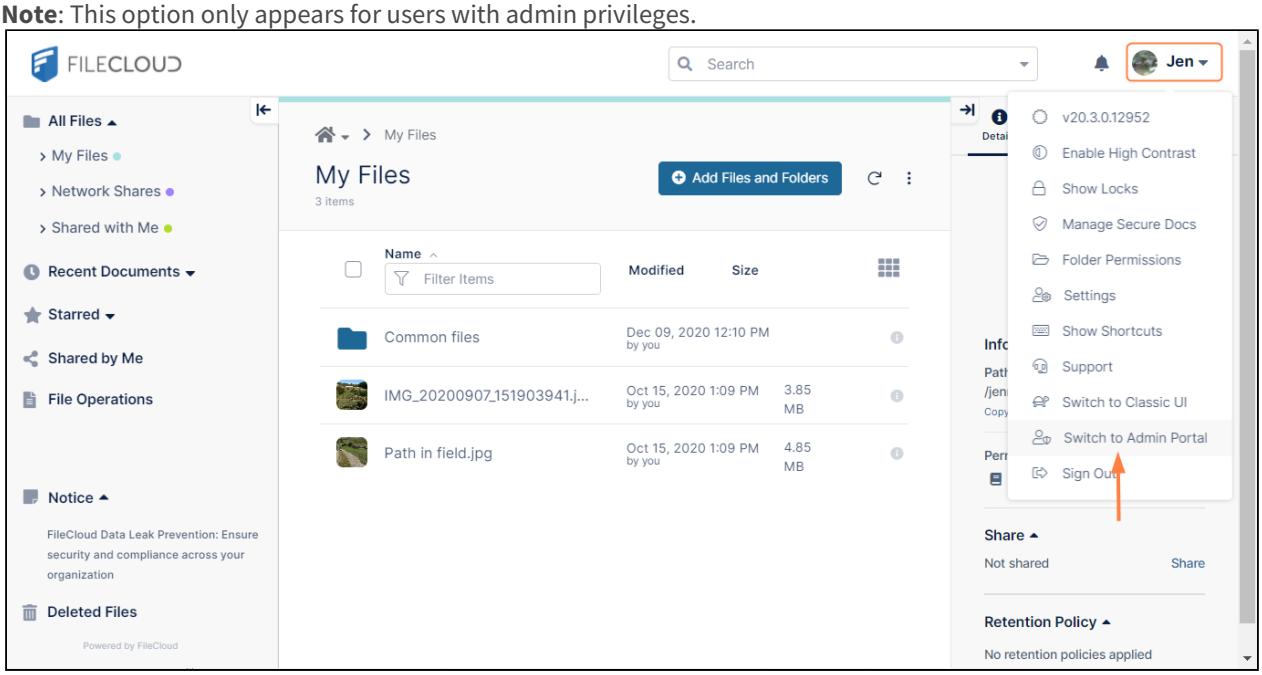


Switch to Admin Portal

Beginning with FileCloud Version 20.3, users with admin privileges can switch from the User Portal to the Admin Portal by clicking the **Switch to Admin Portal** link in the user menu.

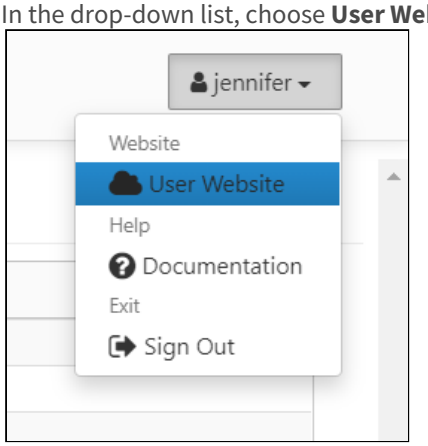
To switch from the User Portal to the Admin Portal:

1. Click your username in the upper-right corner of the screen.
2. In the drop-down list, choose **Switch to Admin Portal**.
   Note: This option only appears for users with admin privileges.



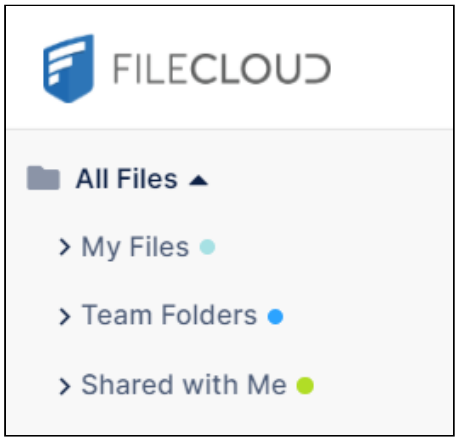
To switch from the Admin Portal back to the User Portal:

1. Click your username in the upper-right corner of the screen.
2. In the drop-down list, choose **User Website**.



My Files, Team Folders, and Shared with Me

At the top of the navigation pane of the user portal is a folder labelled **All Folders** that contains the folders that organize all of your FileCloud files.
The **My Files** folder appears for all users with **Full** user accounts. **Team Folders** appears if you have been given access to them. **Shared with Me** appears if another user has shared a file or folder with you.



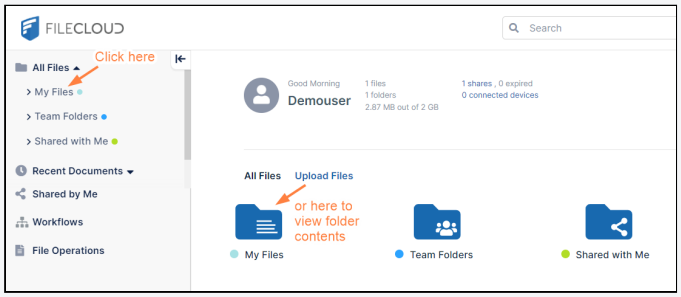
My Files stores your private files. Your administrator sets the amount of space you have to store files.

Team Folders provides a single place where teams in a company can store and organize files and folders.

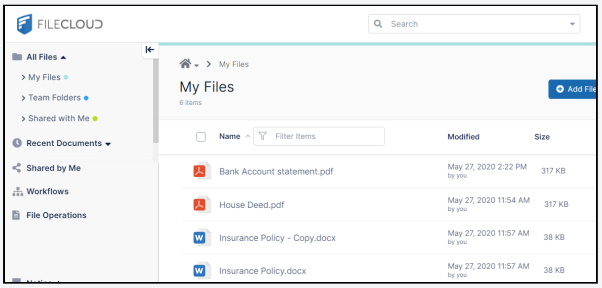
- Team folders are created and shared by your administrator
- You can invite other users to access files in the Team Folder
- Files that you upload to the Team folder do not count against your storage quota

Shared with Me contains folders named for the users who have shared files and folders with you. Each folder contains the files and folders shared with you by the user it is named for.

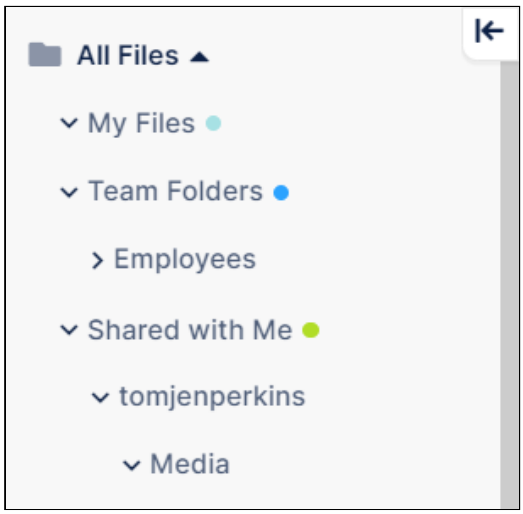
Either click the folder name in the navigation pane, or from the dashboard, click the folder icon in the main window . . .



. . . to view a list of the folder's contents.



You can also click the arrows next to folder names in the navigation pane to expand them and display their sub-folders:



Basic File and Folder Operations

- Working in Folders
- Search
- Create New Files and Folders
- Selecting items
- Preview a File
- Copy Items
- Move Items
- Rename Item
- Download Items
- Uploading Items
- Add to Starred
- Editing Files
- Working with Zip Files
- Delete Items

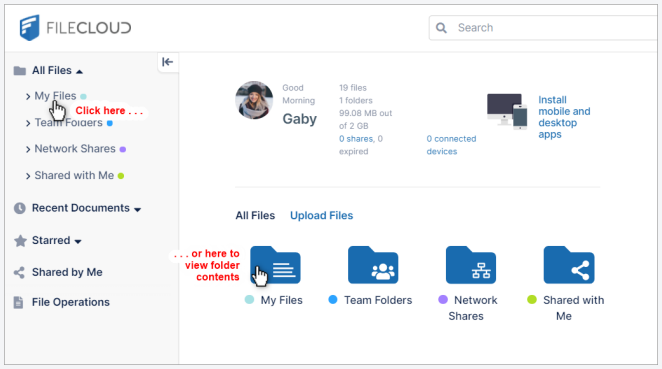
Working in Folders

- Browsing Folders
- Locating items in a folder
- Sorting items in a folder
- View Folder Properties

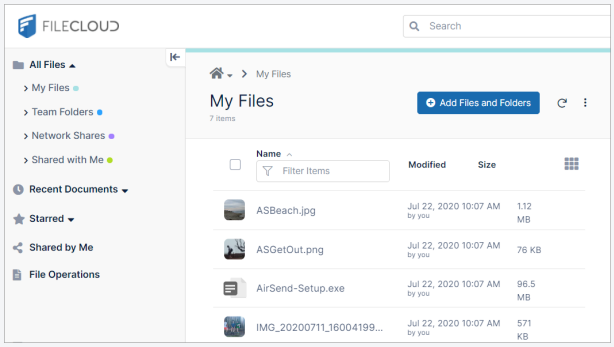
Browsing Folders

Browsing FileCloud Folders

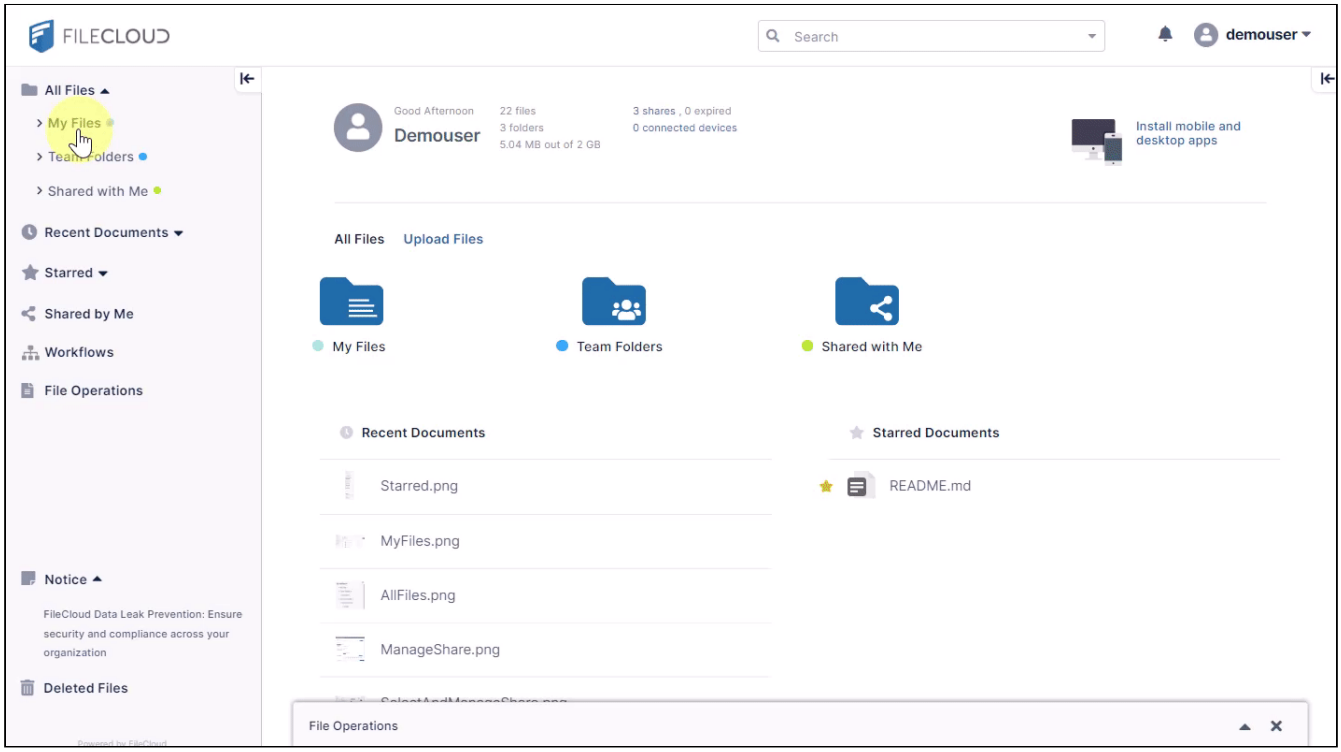
To view the contents of one of the main folders, either click the folder name in the navigation pane,
or from the dashboard, click the folder icon in the main window . . .



. . . The contents of the folder are listed in the main section of the screen.

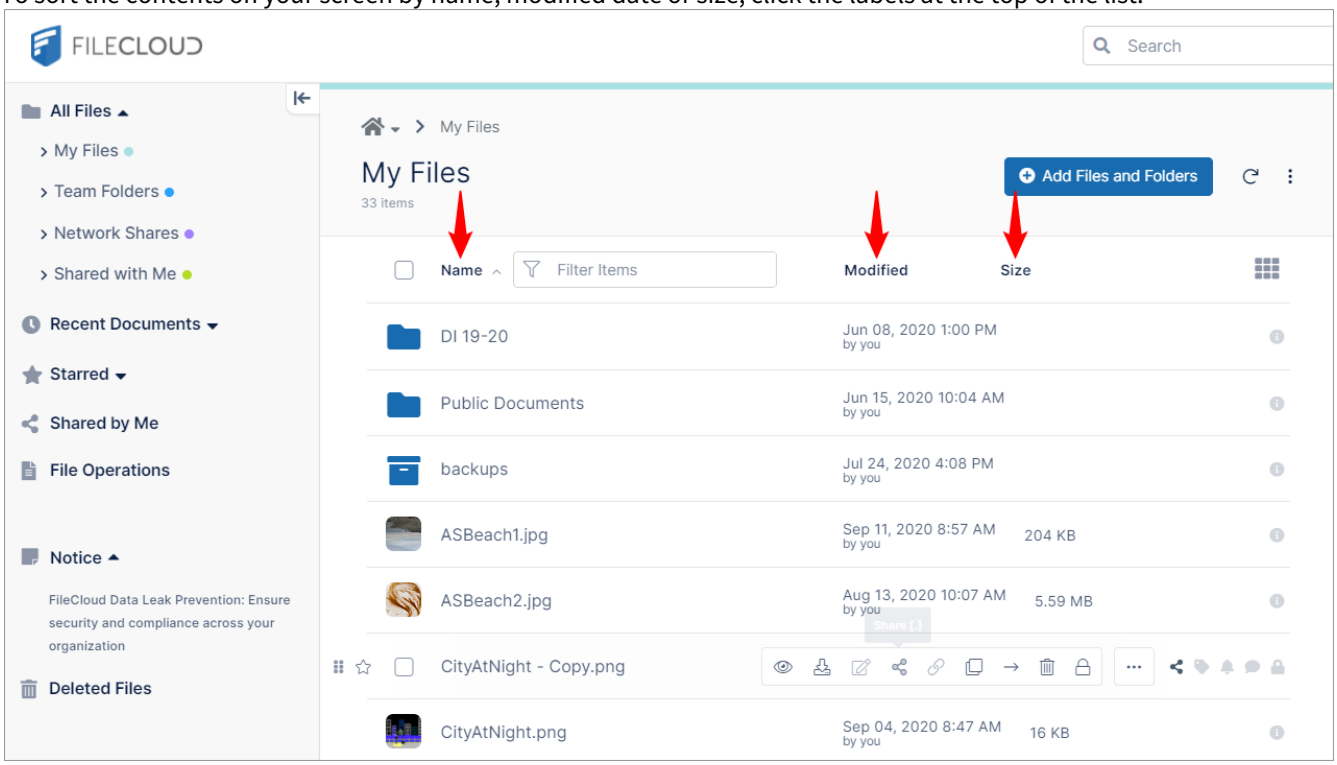


To browse folders for content click the folders in the main section of the screen or expand the folders in the navigation panel.

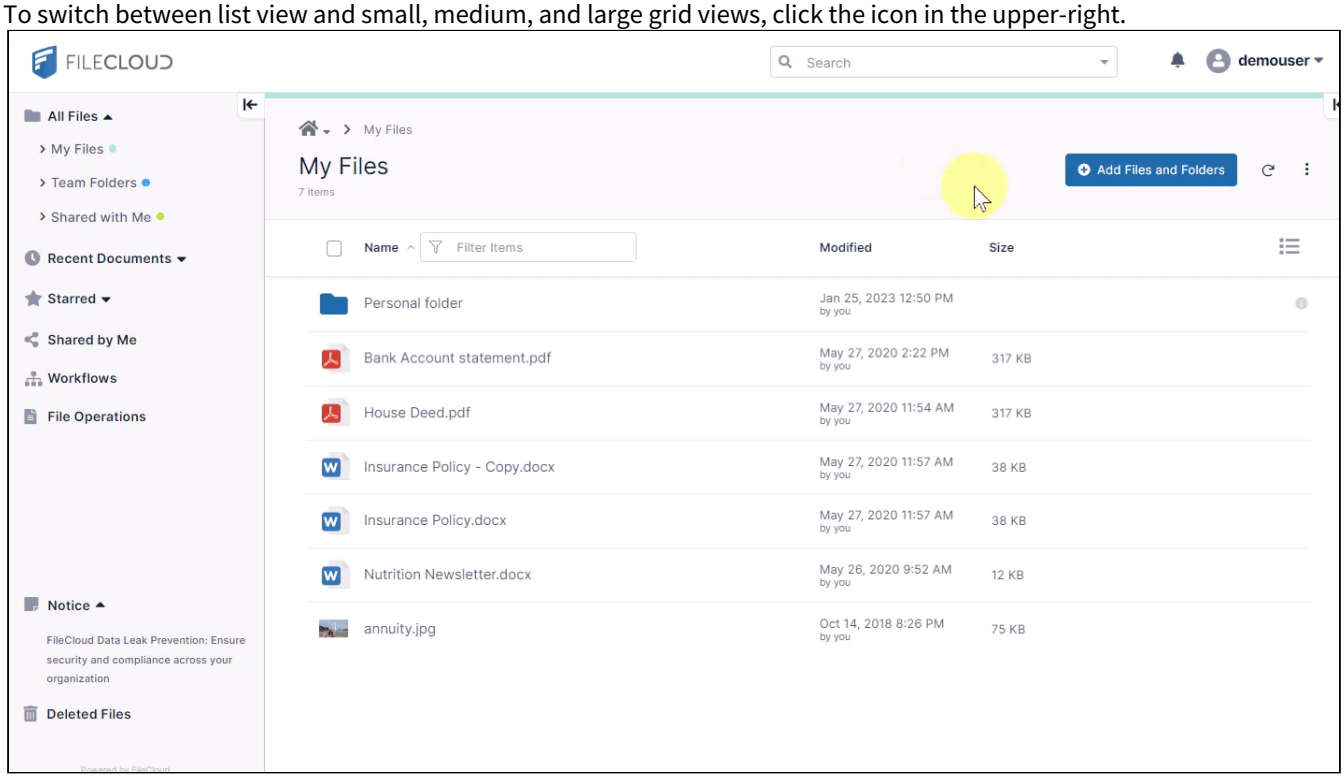


Sorting, switching views, and hiding panels

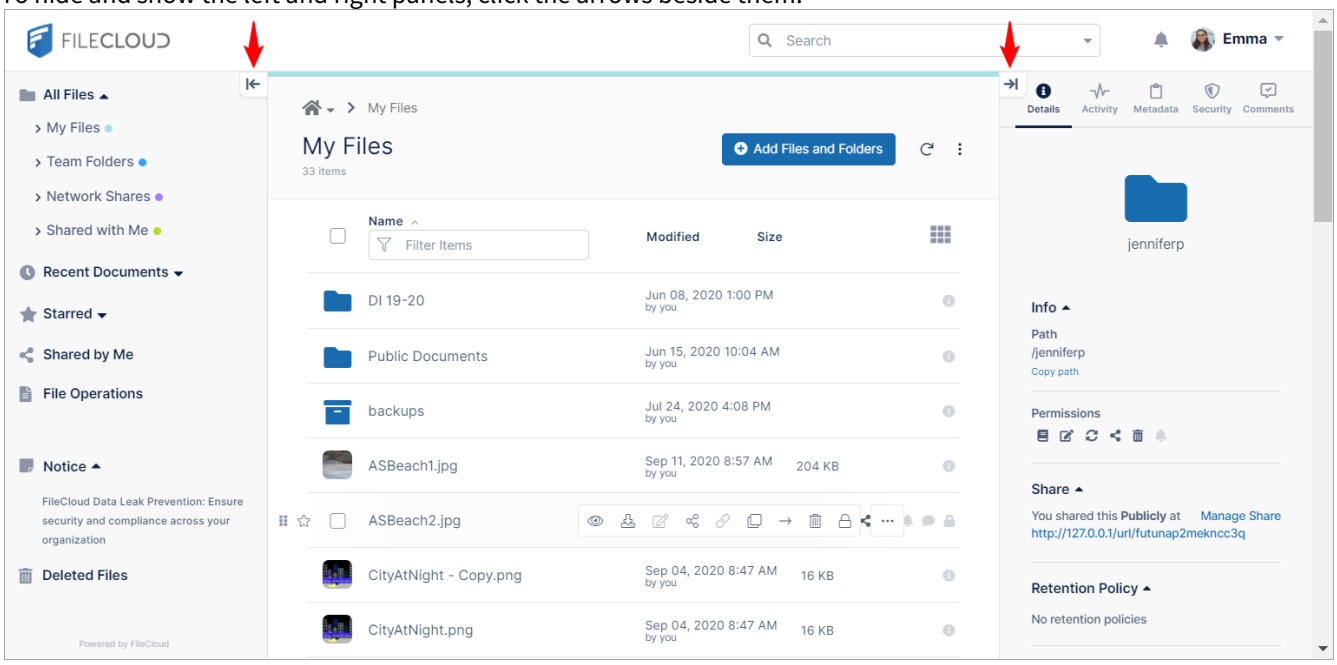
To sort the contents on your screen by name, modified date or size, click the labels at the top of the list.



To switch between list view and small, medium, and large grid views, click the icon in the upper-right.

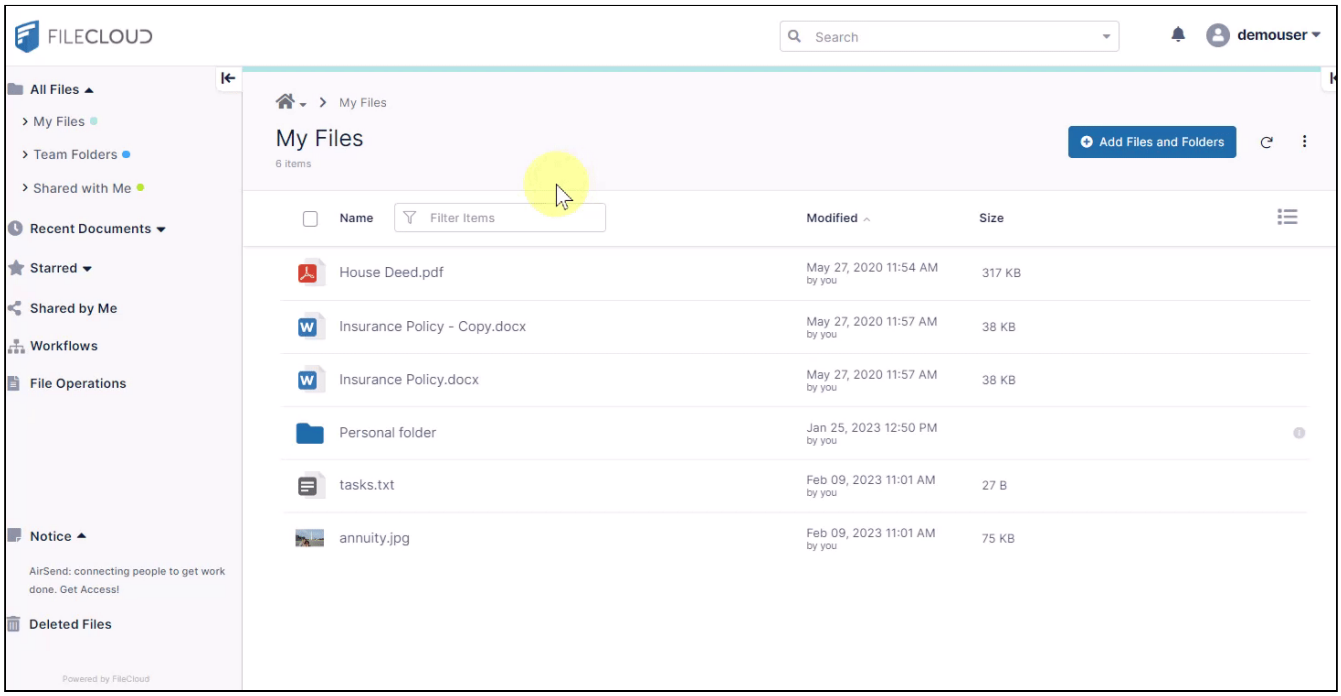


To hide and show the left and right panels, click the arrows beside them.



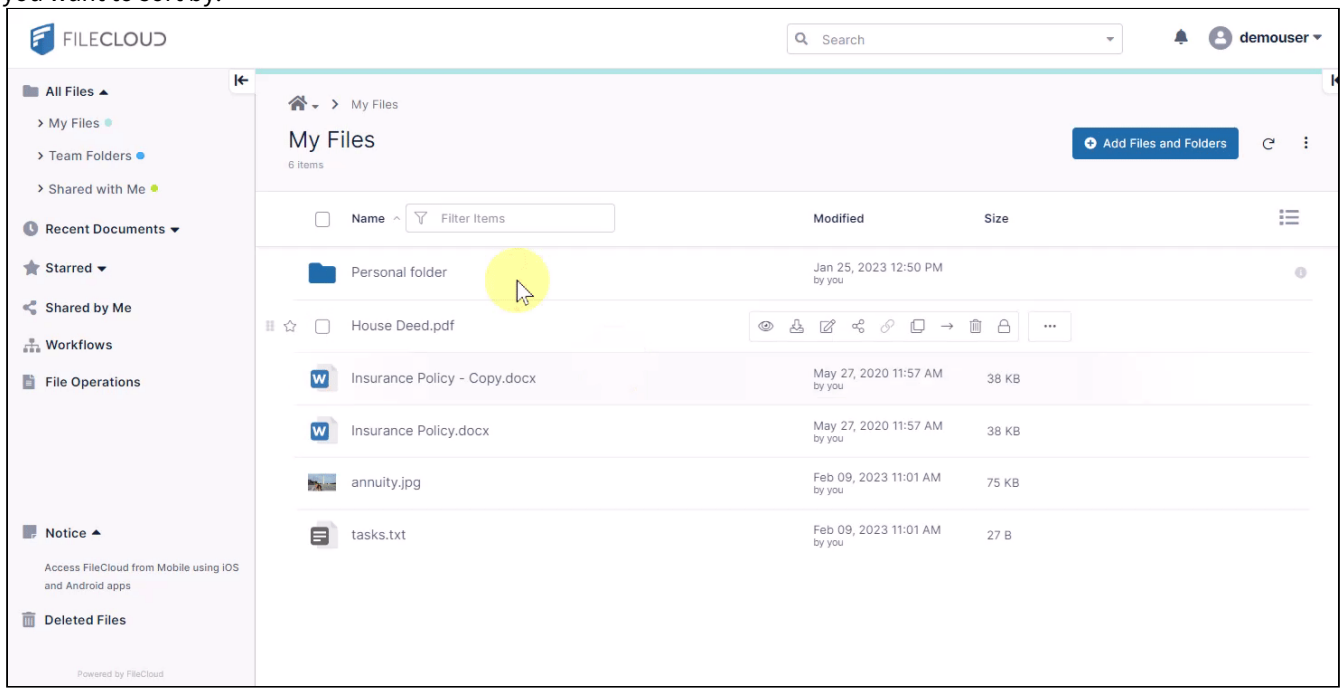
Locating items in a folder

To locate a file or folder, type its name or a portion of its name in the **Filter Items** box.



Sorting items in a folder

You can sort items in a folder by name, modified date, or size. To sort the items, open the folder and click the label that you want to sort by.

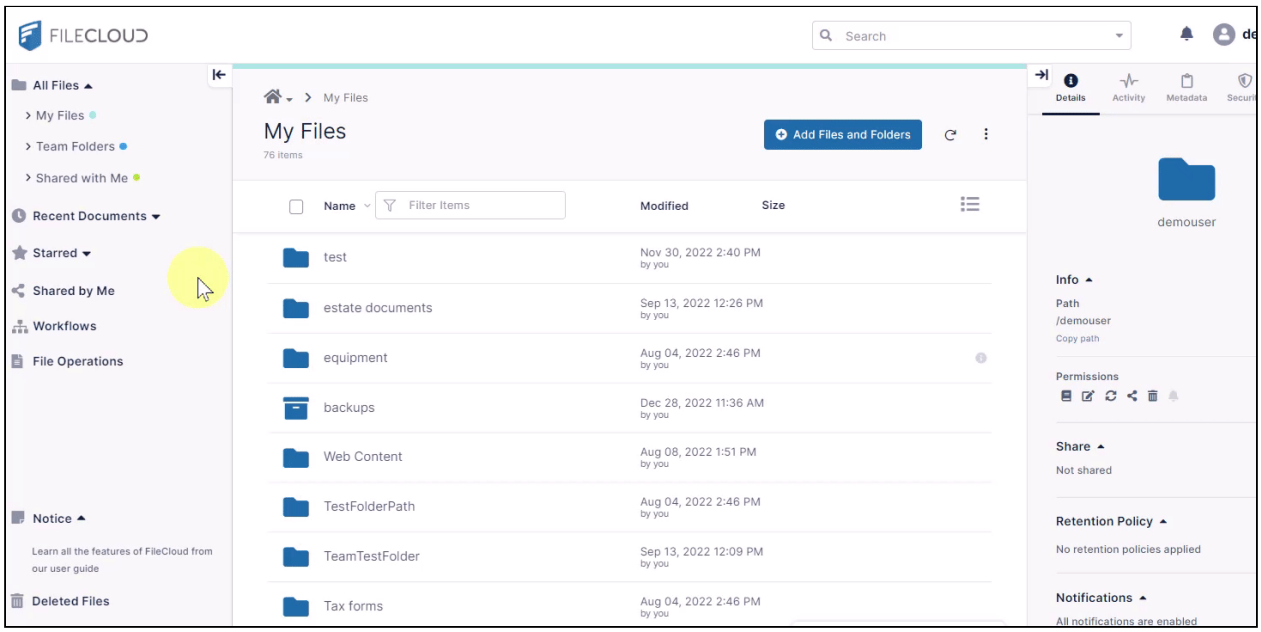


View Folder Properties

You can view a folder's properties to see how much storage space it is using and how many files it contains.

To view folder properties:

1. Leave all folders unchecked to view the combined size and count of all folders or check the box next to a folder to view only that folder's size and count.
2. Click the More icon at the top of the screen, and choose **Properties**.
   A properties box that shows you sizes and counts of files and folders in the folder opens. It enables you to delete previous versions of files.
3. To export a list of the files and folders inside the selected folder to a csv file, click **Create CSV Folder Index** at the bottom of the properties box.



Search

Beginning with FileCloud v17.3, public shares can be searched.
The search function appears for all available data sources in FileCloud including Managed , LAN based Network Shares, and S3 Based Network shares.
Beginning with FileCloud v20.3, if OCR is enabled in your system, content search returns image files and PDF files that match your search string.

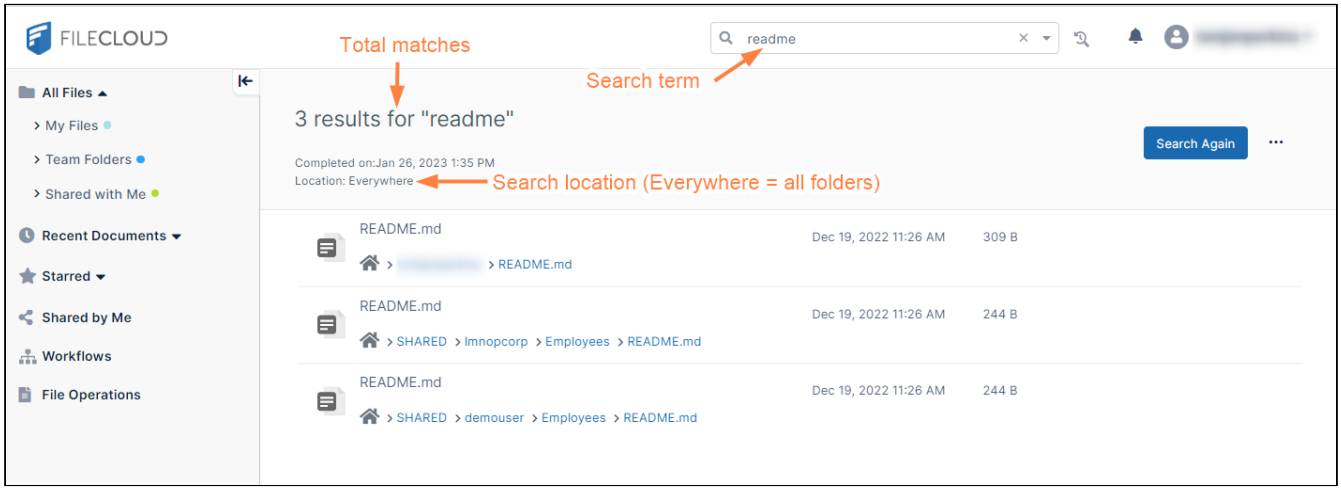
Admins: To search in the Admin Portal, see Search in the Admin Portal

Basic Search

To perform a basic search for a file or folder, enter the search term in the search box at the top of the screen and click enter.

- The search is performed on all folders.
- By default, filename is searched, but both filename and content may searched. This is set in the **Advanced Search** dialog box.
  Note: If the content search feature is not configured in your system, file contents are not searched.
- By default, search results are cached for up to 3 months to reduce the server load. This can be configured by your administrator. Search results can be refreshed by tapping the "Search Again" link.
- Searching is case-insensitve.
- Searches, by default, search all of your content in FileCloud, not just content in the path you have navigated to. However, your admin may add a setting that causes searches, by default, to search in the path you have currently navigated to. See Option to search on the current navigation path, below.

Content search hits are returned with the matching string highlighted except in the case of lengthy search results, where omitting highlighting achieves quicker response time.

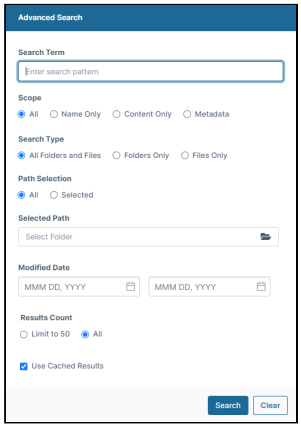


Search Options

Metadata search

Starting in FileCloud version 18.1, metadata search is available if enabled by administrator.
Starting in FileCloud version 19.3, the Use Cached Results option is available.

Click the drop-down arrow in the search bar to enter advanced search options.



1 Advanced Search box

Scope - Which parts of a file or folder are searched.

- **All** - name, content, and metadata (default)
- **Name Only** - file or folder name
- **Content Only** - file content
- **Metadata** - file or folder metadata

Search Type - Search files, folders or both.

- **All Folders and Files** (default)
- **Folders Only**
- **Files Only**

Path Selection - Search everywhere or on a specific folder path only.

- **All** (default)
- **Selected** - Search in the path selected in **Selected Path**

Modified Date - Only search items modified within the specified dates.

Results Count - Return all matches or no more than 50 matches.

- **Limit to 50**
- **All** (default)

Use Cached Results - When checked, do not clear results for searches that have been run recently; return results that are already stored. (checked by default)

To run the advanced search, click **Search** after you have entered search parameters.

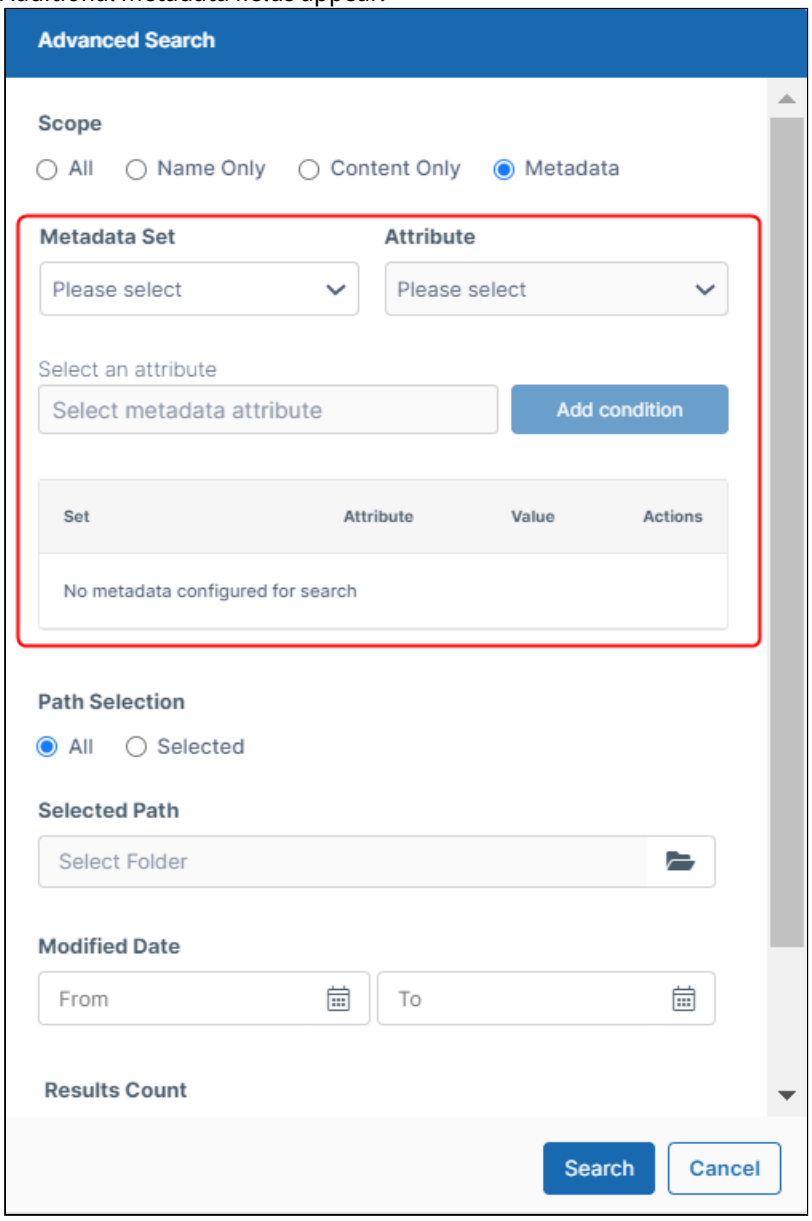
To clear the **Advanced Search** dialog box, click **Cancel** after you run a search.

Metadata Search

To perform a metadata search:

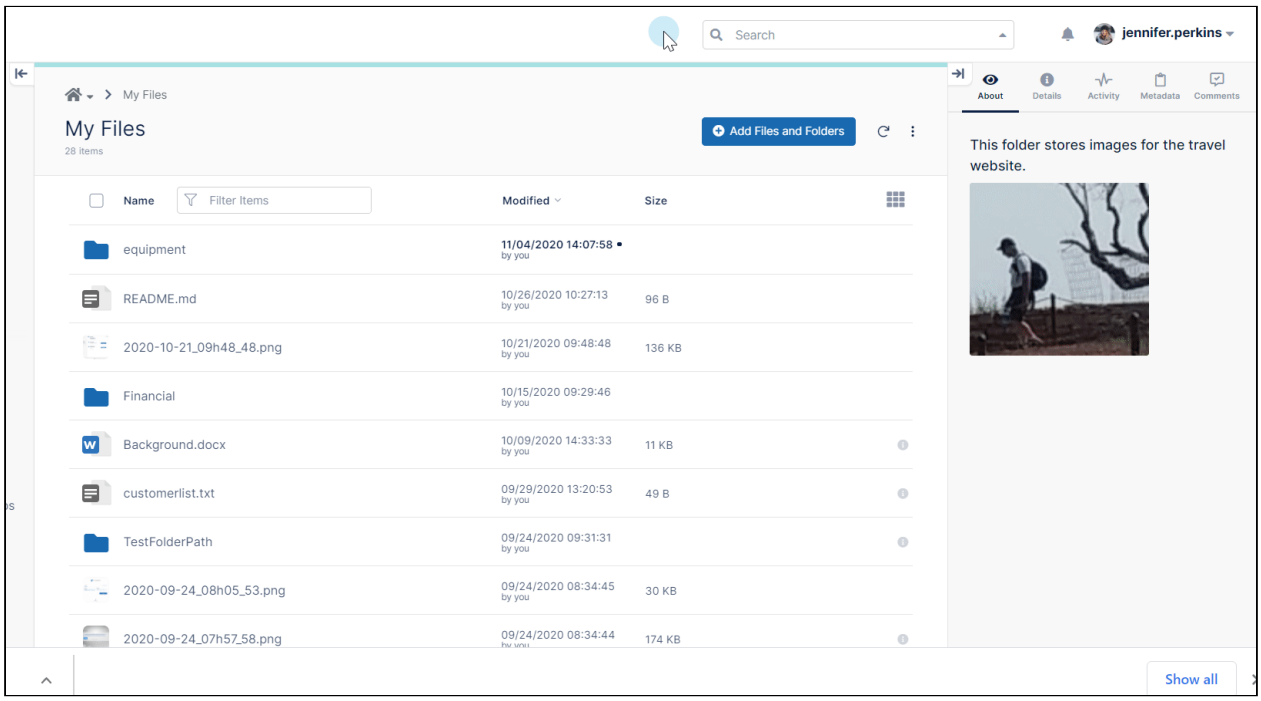
1. In the search bar, click the arrow to open the **Advanced Search** dialog box.

2. For **Scope**, select **Metadata**.
   Additional metadata fields appear.



3. Choose values for **Metadata Set** and **Attribute**. Then choose a value for the attribute.
   For help with metadata and its terminology in FileCloud, see Adding Metadata.
4. Click **Add Condition**.
   The condition appears in the table below the attribute.
5. Add any number of conditions.
6. Enter any additional search options.
7. Click **Search**.

   The search in the video below looks for files with **Image** metadata configured, and then looks to see if **Image Orientation** is equal to **Horizontal**.



Metadata Search limitations

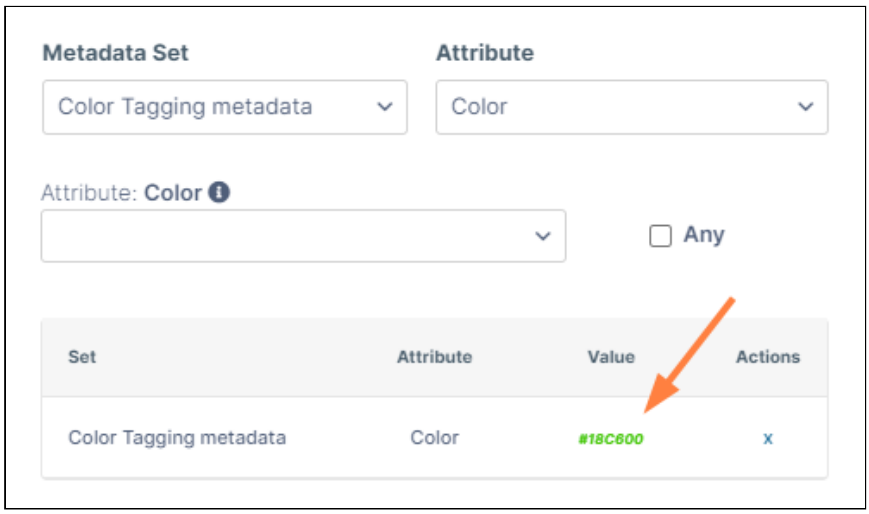
In FileCloud the metadata search is subject to the following limitations:

- Search is performed as an exact match. Specify the whole value that you are searching for. Partial matches aren't supported
- Every metadata search condition narrows the search - the result has to match all conditions at the same time (AND logical operation is performed)

Color metadata search:

When you search on a color metadata:

- The condition in **Attribute: Color** is automatically added when you select it.



- If you check **Any**, you can add multiple colors, and files tagged with any of the colors selected are returned.
- If you do not check **Any**, you can only select one color.
- The hexadecimal value of the color appears in the condition. For example, the following condition searches for files tagged green.

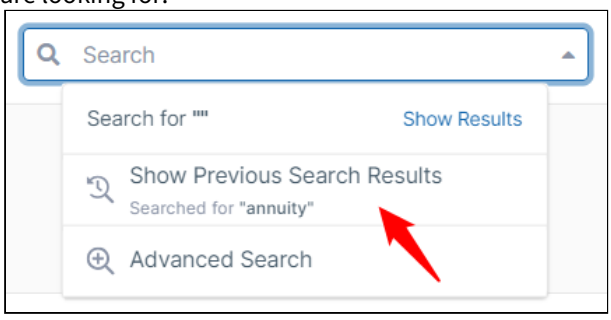
View Previous Results

To increase search speed when users rerun a previous search, FileCloud saves search results.

You can return saved results from the search bar, or configure FileCloud to return saved results for an advanced search:

To return saved results from the search bar:

1. Click in the search bar.
2. In the options that appear below, see if there is a **Show Previous Search Results** option for the search term you are looking for.



3. Click **Show Previous Search Results** and view the results again.

To use cached results for an advanced search:

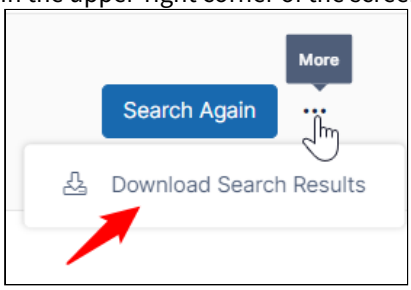
1. In the Search bar, click the down arrow.
   The **Advanced Search** dialog box opens.
2. Check the **Use Cached Results** checkbox.
3. Enter any other search options.
4. Click Search.
   If there are previous search results for the same search parameters, the results are returned.

After searching

You have various options for performing actions on search results.

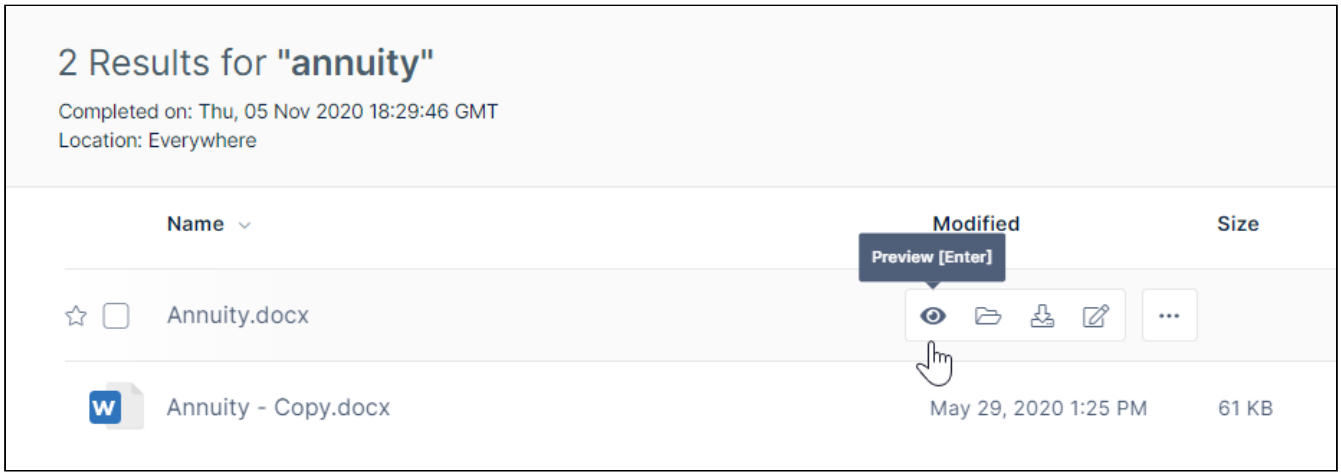
To save the results of your search:

In the upper-right corner of the screen, click the More icon and choose **Download Search Results**.

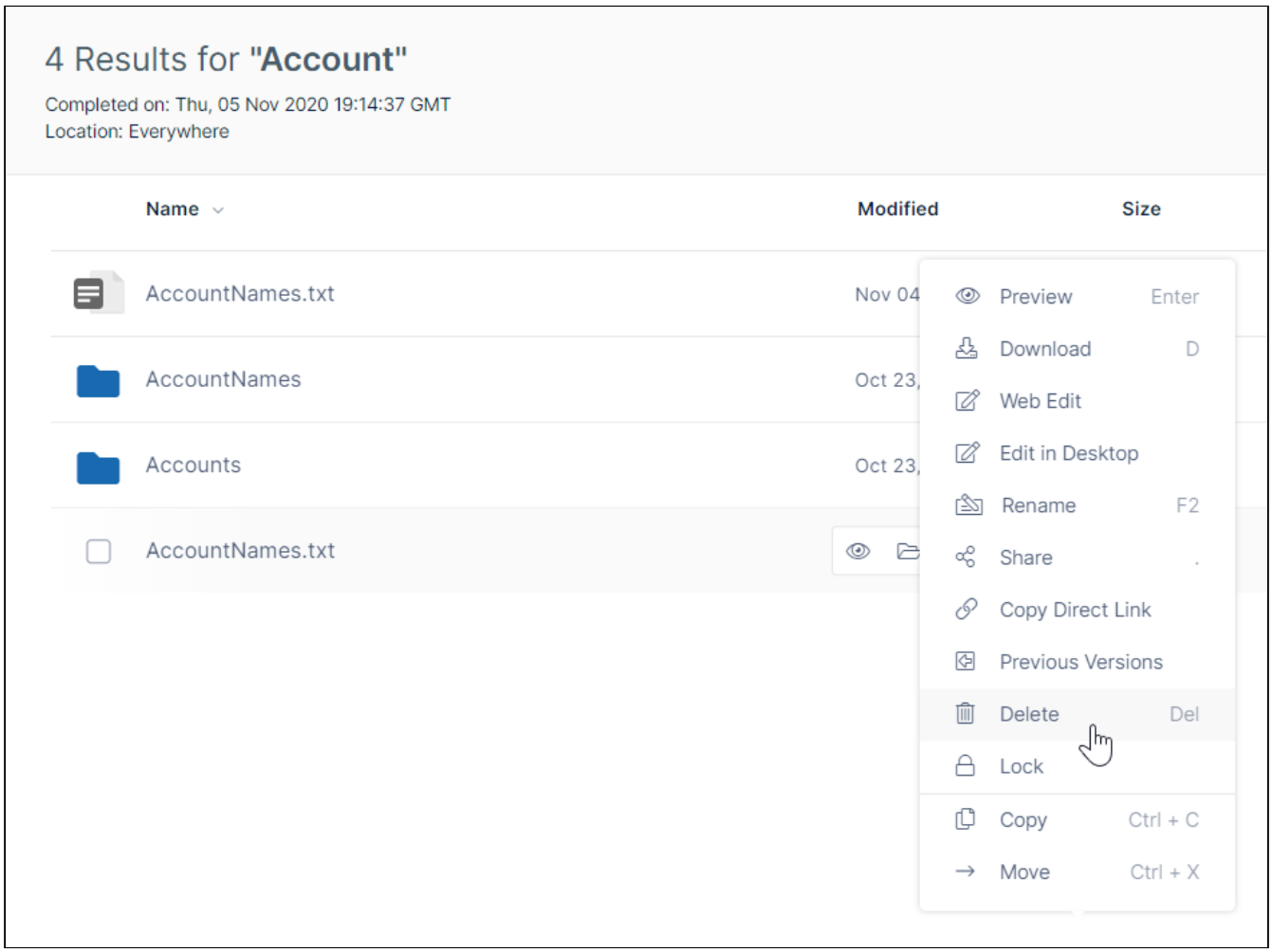


To perform other actions on a file or folder returned in a search:

Hover over the item and click one of the icons to **Preview**, **Go To**, **Download**, or **Edit Online**.

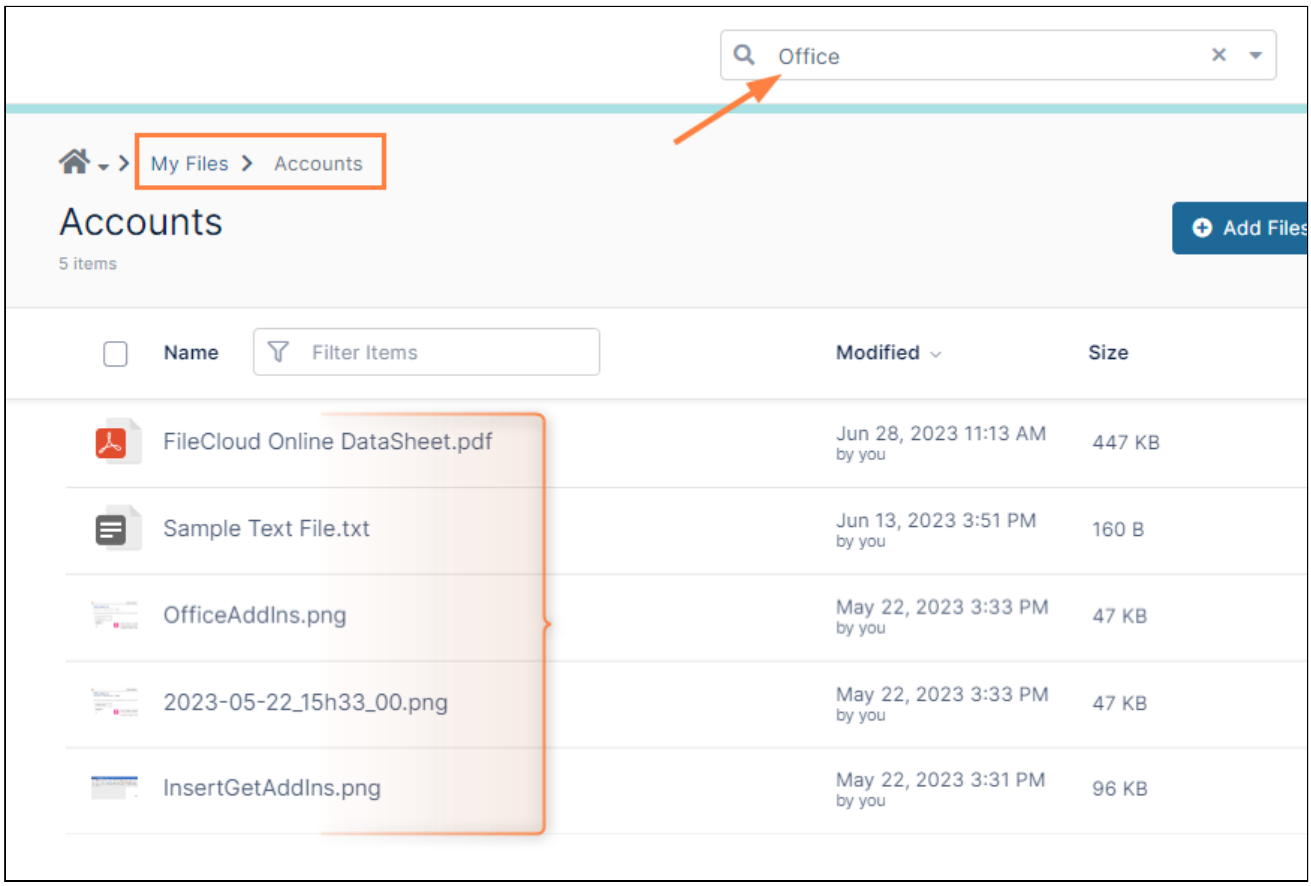


Click the More icon for additional actions to perform on the item.

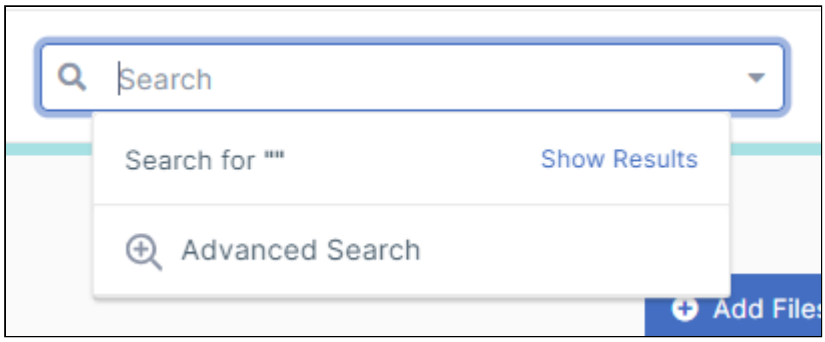


Option to search on the current navigation path

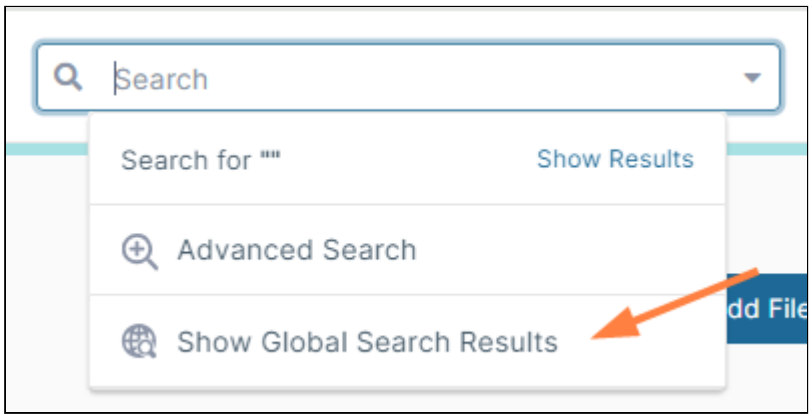
By default, the FileCloud search is global; it searches all content in FileCloud. Your admin may change the default search to only look at the contents of the path you have currently navigated to in the user portal. For example, if you have navigated to **My Files > Accounts**, as in the following screenshot, the search only looks for the term you have entered in the Search bar in the files and folders in **My Files > Accounts** (the bracketed content in the screenshot), not all content in FileCloud.



If your admin has changed from the default (global search) option, instead of seeing the following when you click in the Search bar:



You see:



Searching globally is still available to you, but you must click **Show Global Search Results**. Otherwise, your search returns results from the current path only.

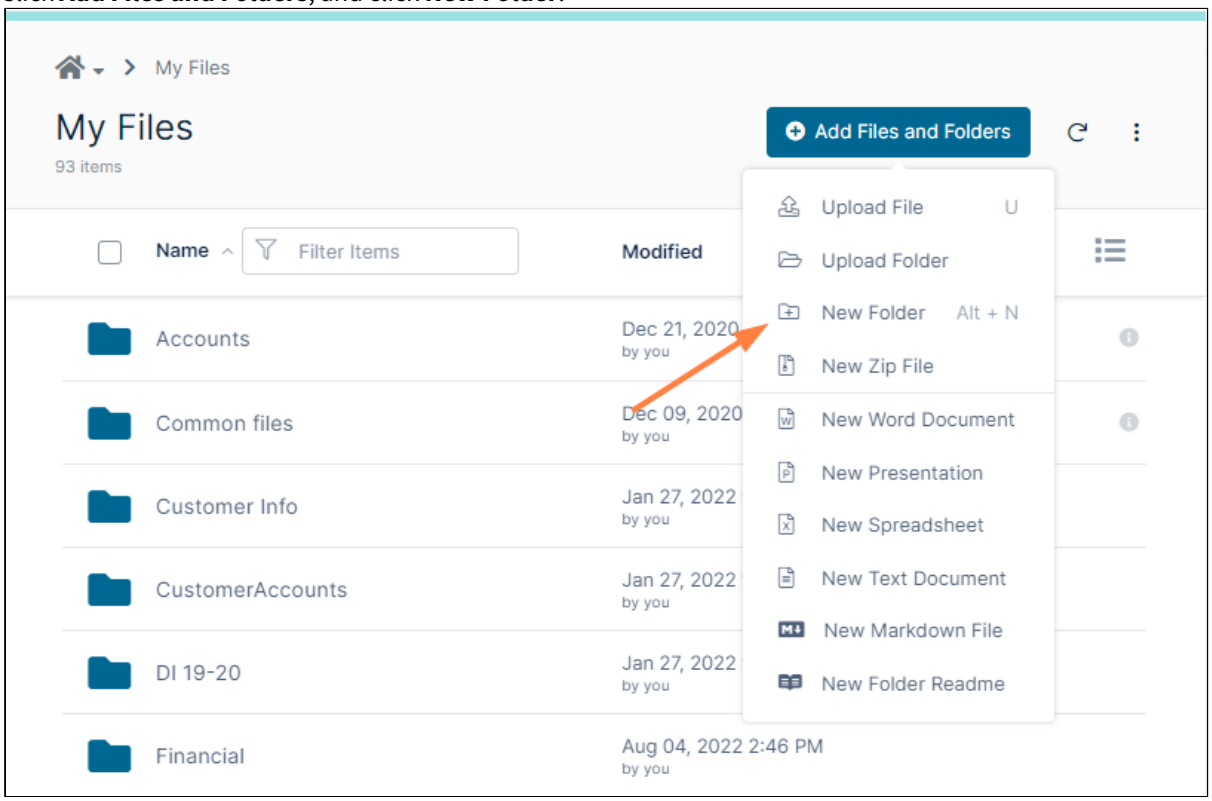
Create New Files and Folders

You can create files and folders within a folder.

To create a new folder:

1. Open a folder.

2. Click **Add Files and Folders**, and click **New Folder**.



   The new folder appears in the list.
3. Name the folder, and click **Enter**.
   The folder opens so you can add contents.

To create a new file in a folder

> The **New File** options are not visible if the option is not enabled in the system.
> Admins: See New Document Creation via Web Browser to enable this option.

If you are creating a folder readme file, see To create a folder readme, below.

1. Open a folder.
2. Click **Add Files and Folders**, and choose a file type from the options.
   The new file appears in the list.
3. Name the file, and click Enter.
   The file opens.
4. Add content.
5. Click **Save**, and click the left arrow to return to the list of files.
   The following video demonstrates the process.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

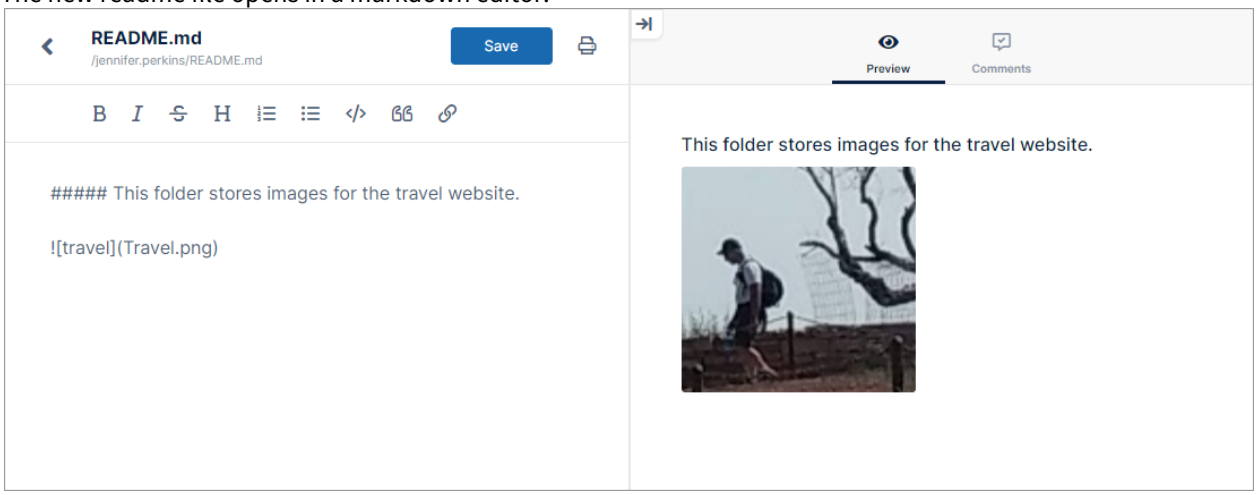
Movie URL not available.

For help editing a markdown file, see Using the Markdown Editor.
For help creating and working with zip files, see Working with Zip Files

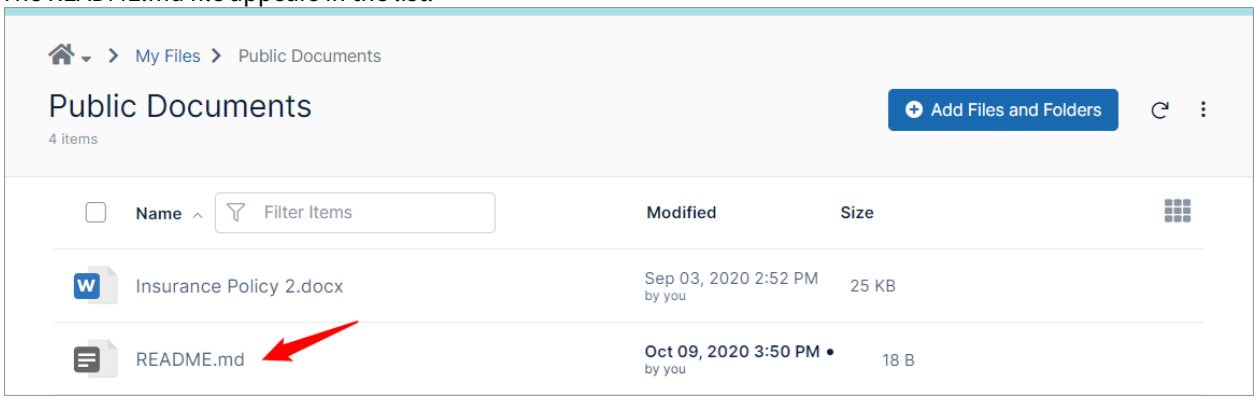
To create a folder readme

A readme file includes information about what a folder is about or what it contains, and is always named **readme.md**. Since you do not have to name it, it opens for editing as soon as you create it.

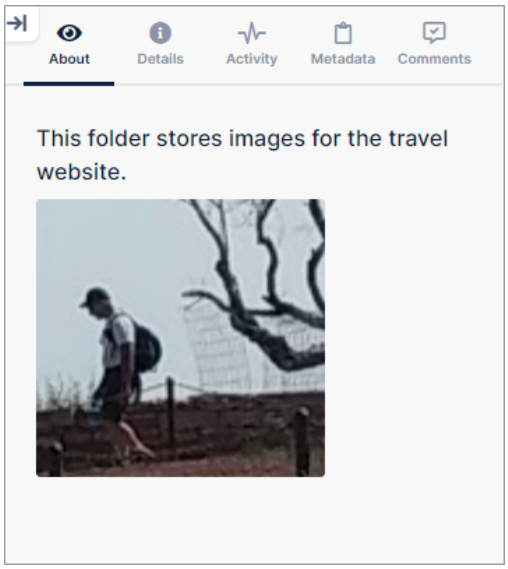
1. Open a folder.
2. Click **Add Files and Folders**, and choose **New Folder Readme**.
   The new readme file opens in a markdown editor.



   For help using the markdown editor, see Using the Markdown Editor.
3. Click **Save**, and click the arrow in the upper-left of the markdown editor to return to the list of folder contents.
   The README.md file appears in the list.



The contents of read.me appear in the About tab in the right panel:



Note: If you click **Add Files and Folders** and choose **New Folder Readme** again, the current README.md opens for editing.

Which special characters cannot be used in file names?

Folder and File names cannot end in a period (.) or a comma (,).

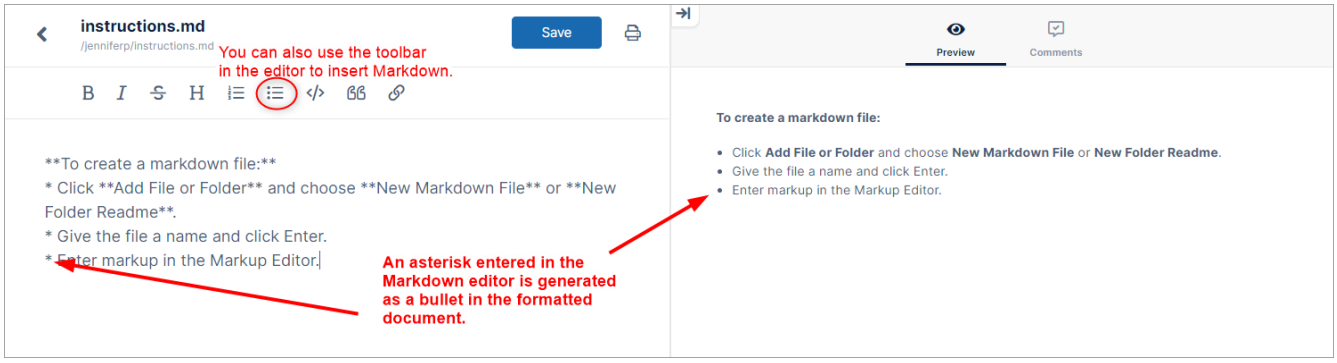
Folder and file names cannot contain the following characters:

.. \ / : ? " < > |

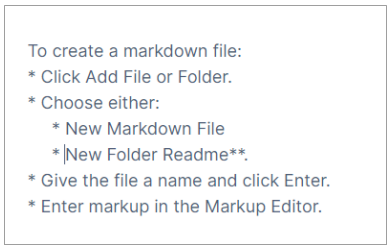
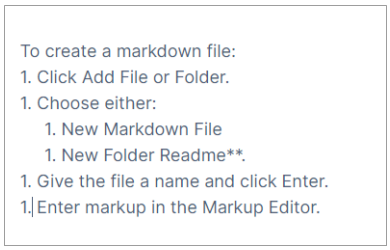
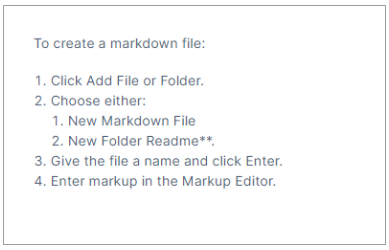
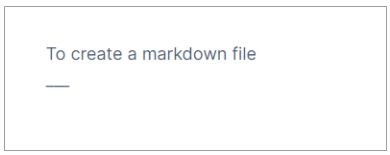
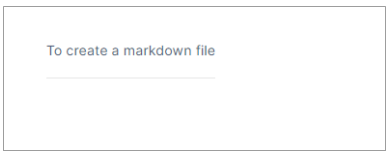
Using the Markdown Editor

When you create a new markdown file or folder readme, it opens in the markdown editor, which displays two panels. One side is for entering content with Markdown, a simple formatting language that lets you enhance plain text with styling such as italics, bold print, bullets and indents. The other side shows the formatted content.

In the following example, the Markdown editor includes a list of instructions preceded by asterisks. In the preview panel the asterisks appeared as bullets, which is how they will appear when the file is formatted. You can also use the shortcuts in the text editor's menu bar to insert Markdown.



The following table shows Markdown symbols and the effect they have when the document is formatted:

Markdown feature	In Markdown editor	Formatted content
Bullets An asterisk followed by a space in front of a line is formatted as a bullet. For each level of bullets, indent 5 spaces.		
Numbered list A number followed by a period and then a space in front of a line is formatted as a number in a list. It doesn't matter what numbers you use; Markdown displays the list with increments of 1. For each level of numbers, indent 5 spaces.		
Italics When asterisks or underscores precede and follow text without spaces, the text is formatted as italics.		
Bold When double-asterisks or double-underscores precede and follow text without spaces, the text is formatted as bold.		
Horizontal line A line of three or more asterisks or three or more dashes in a row is formatted as a line the width of the text above it.		

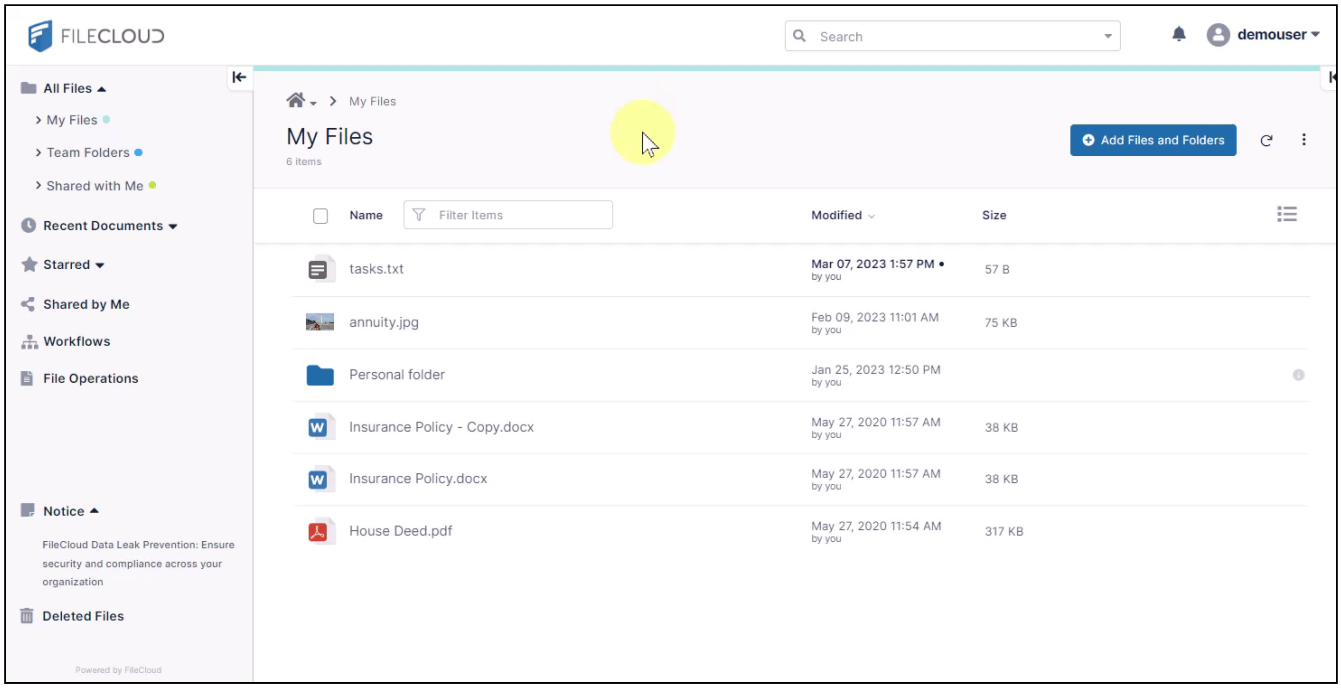
Markdown feature	In Markdown editor	Formatted content
Headers When pound signs followed by a space precede a line of text, the text is formatted as a headers. Up to 6 levels of headers are supported. The number of pound signs indicates the level of the header.	# Level 1 Header ## Level 2 Header ### Level 3 Header #### Level 4 Header ##### Level 5 Header ###### Level 6 Header	Level 1 Header Level 2 Header Level 3 Header Level 4 Header Level 5 Header Level 6 Header
Links Text in brackets followed by a link address in parentheses is formatted as a link.	getfilecloud.com	getfilecloud.com
Images An exclamation point, followed by text in brackets and the image filename in parentheses is formatted as the image. The image must be in the same folder as the markdown file.	![travel](Travel.png)	
Quote When a greater than sign precedes text, a vertical bar appears in front of the text and the text is indented to indicate that it is a quote. To break out of a quote, you must enter a blank line after the final line of the quote.	Here are a few comments from users: > Great product! Makes my life easier. > Got the job done in half the time!	Here are a few comments from users: *Great product! Makes my life easier.* *Got the job done in half the time!*
Code To enter code format (gray background with black text), skip a row and indent 4 or more spaces.	Here are the style tags: <style> p {font-size:16px;} </style>	Here are the style tags: <style> p {font-size:16px;} </style>

Selecting items

Selecting a Single File or Folder

Select a file or folder by clicking the checkbox next to it or any where in the item row.

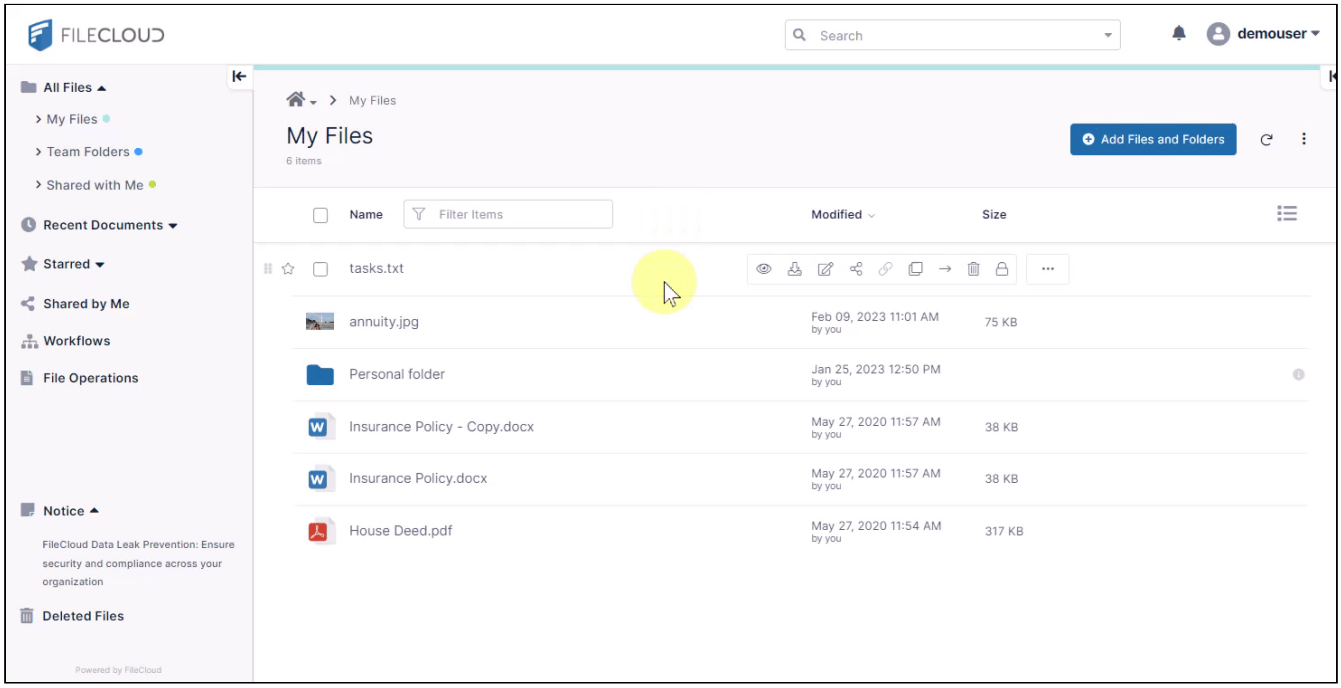
Hover over the row to access common actions, or click the More icon [...] next to the list of common actions to access all actions.



Selecting Multiple Items

Select multiple files and/or folders by clicking the checkbox next to each or by clicking anywhere on each row and holding Ctrl+Click (or Ctrl+Shift to select a range). Unselect all selected files and folders by checking and unchecking the top box.

Click the More icon [⋮] in the upper-right corner of the screen and choose **Delete**, **Copy**, **Move**, or Export Secure Docs. **Export Secure Docs** is only available if only files are selected and all of the file types can be exported securely.



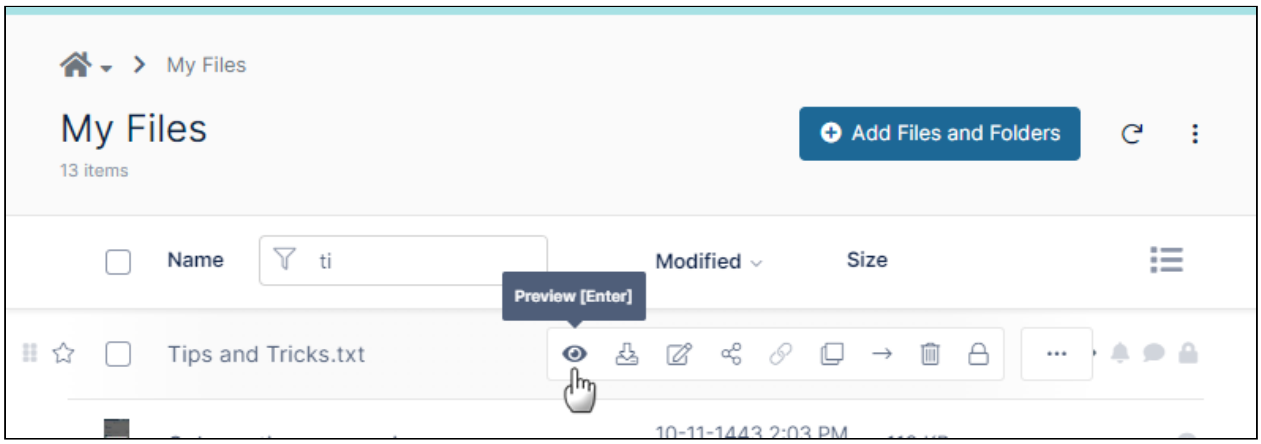
Preview a File

You can preview a file in the user portal without opening it for editing.

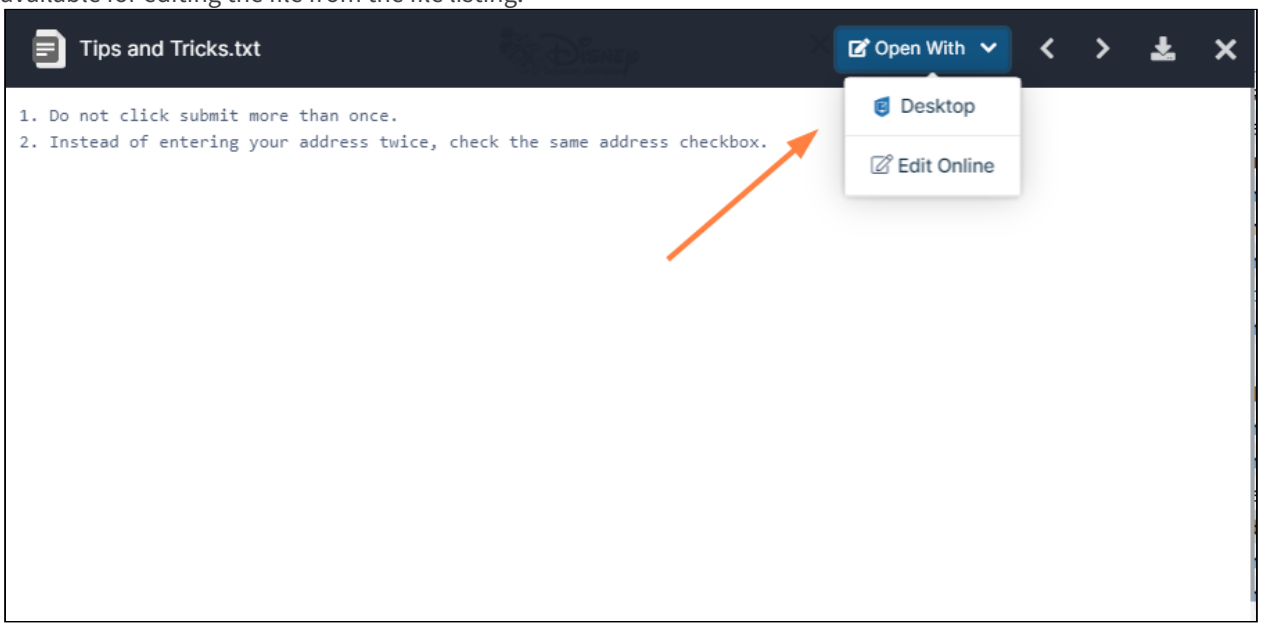
If you do not see the **Preview** button when you hover over a file, contact your administrator.
If you are an administrator, enable Document Preview.

To preview a file:

1. Hover over a file in the User Portal.
   A row of icons appears.
   The **Preview** icon is the first icon, which looks like an eye.



2. Click the **Preview** icon.
   (You can also click the name of the file to open it for preview).
   A window that shows the content of the file opens.
   The preview can be edited with the same Web edit/Office Online and Edit in Desktop applications that are available for editing the file from the file listing.



Which types of files can I preview?

Preview is available for audio, video, image, pdf, txt , md and Office file types, as well as the file types indicated in the table below.

Unable to render include or excerpt-include. Could not retrieve page.

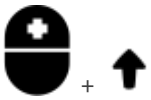
For file types that cannot be previewed, such as exe, FileCloud displays a download option in the preview window.

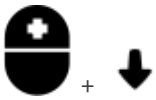
How can I use the DICOM images in preview?

You can store, view and share medical files such as X-rays, CT scans, Ultrasounds and MRIs securely in FileCloud Server.

- You can upload a medical file with a file extension of .DICOM.
- In the dashboard, you can select a file with the .DICOM extension, and then click the **Preview** button.
- In Preview mode, the medical file is rendered as an image with special viewing options that are exclusive to viewing .DICOM files.

When you open the preview, you have the following options:

	Option	Keys	Description
	Drag	hold down the left mouse button	moves the image around in the preview window
	Zoom In	scroll the mouse wheel forward OR hold down the right mouse button and drag forward	enlarges the image in the preview window
	Zoom Out	scroll the mouse wheel backwards OR hold down the right mouse button and drag backwards	reduces the image in the preview window
	Lighten the Image	 hold down the mouse wheel and drag forward	increases the contrast to lighten the image

	Option	Keys	Description
	Darken the Image	 hold down the mouse wheel and drag backwards	decreases the contrast to darken the image

These options are only available for .DICOM image types.

Copy Items

Copy a single item

To copy a single item, hover over it and click the copy icon, then navigate to the new location and click **Copy**.
The following video walks you through the procedure.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Copy multiple items

To copy multiple items, check the boxes next to the items, and click the more icon in the upper-right corner of the screen. Choose **Copy**, and then navigate to the new location and click **Copy**.
The following video walks you through the procedure.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Move Items

Move a single file or folder by dragging and dropping

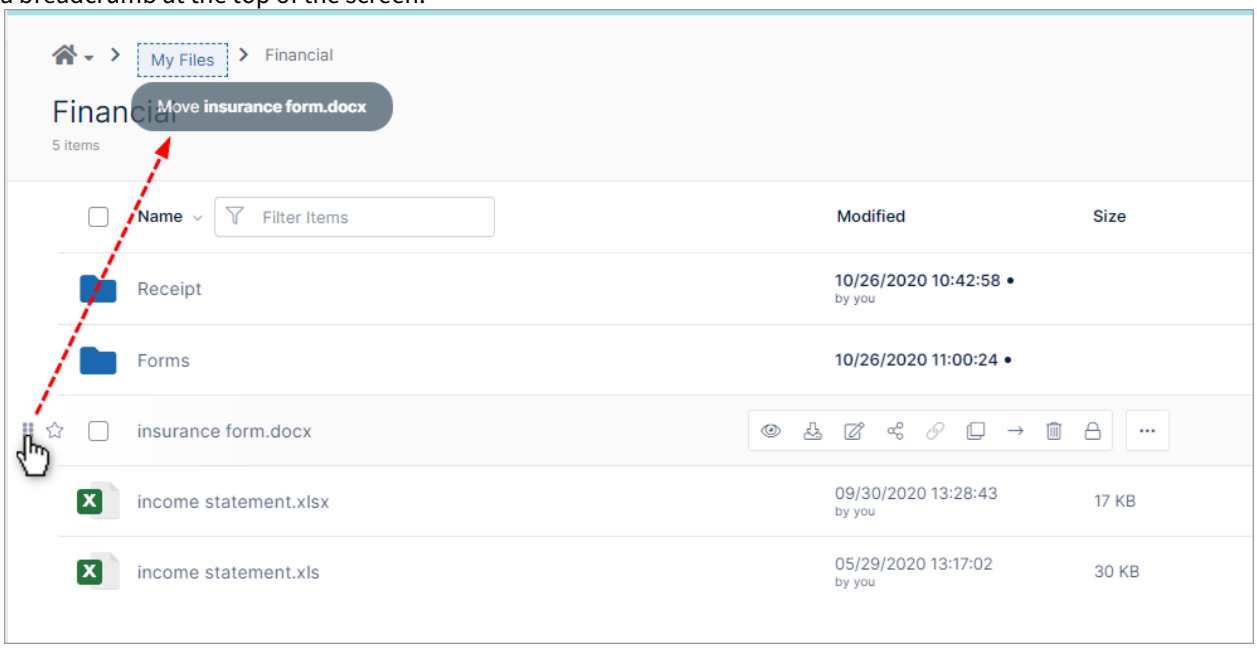
From a folder opened in the main section of the screen, you can drag a file or folder by the grab bars to its left and drop it into:

- another folder in the main section of the screen.

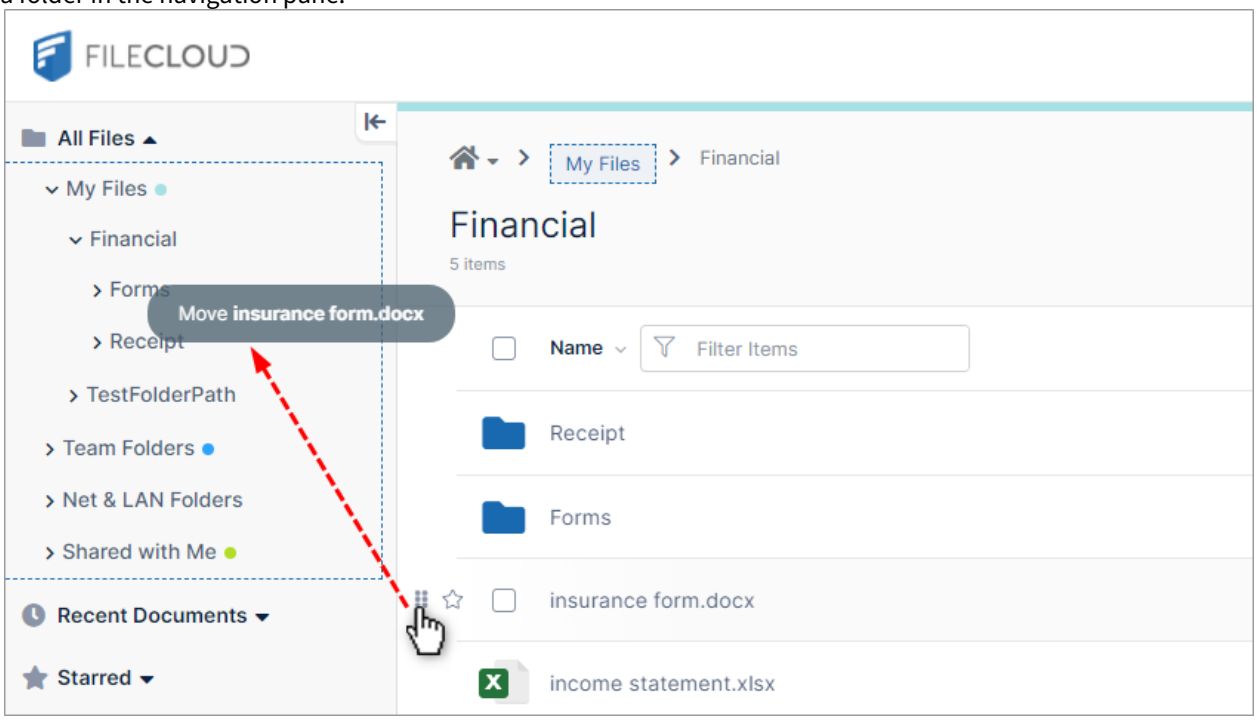
Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

- a breadcrumb at the top of the screen.



- a folder in the navigation pane.



Move multiple files and folders by dragging and dropping

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Move a single file or folder using the Move action

To move a single file or folder, you can also use the **Move** action in the file or folder's row.
The following video shows you the procedure.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Move multiple files and folders using the Move action

To move multiple files or folders, use the **Move** action in the **More** drop-down list.
The following video shows you the procedure.

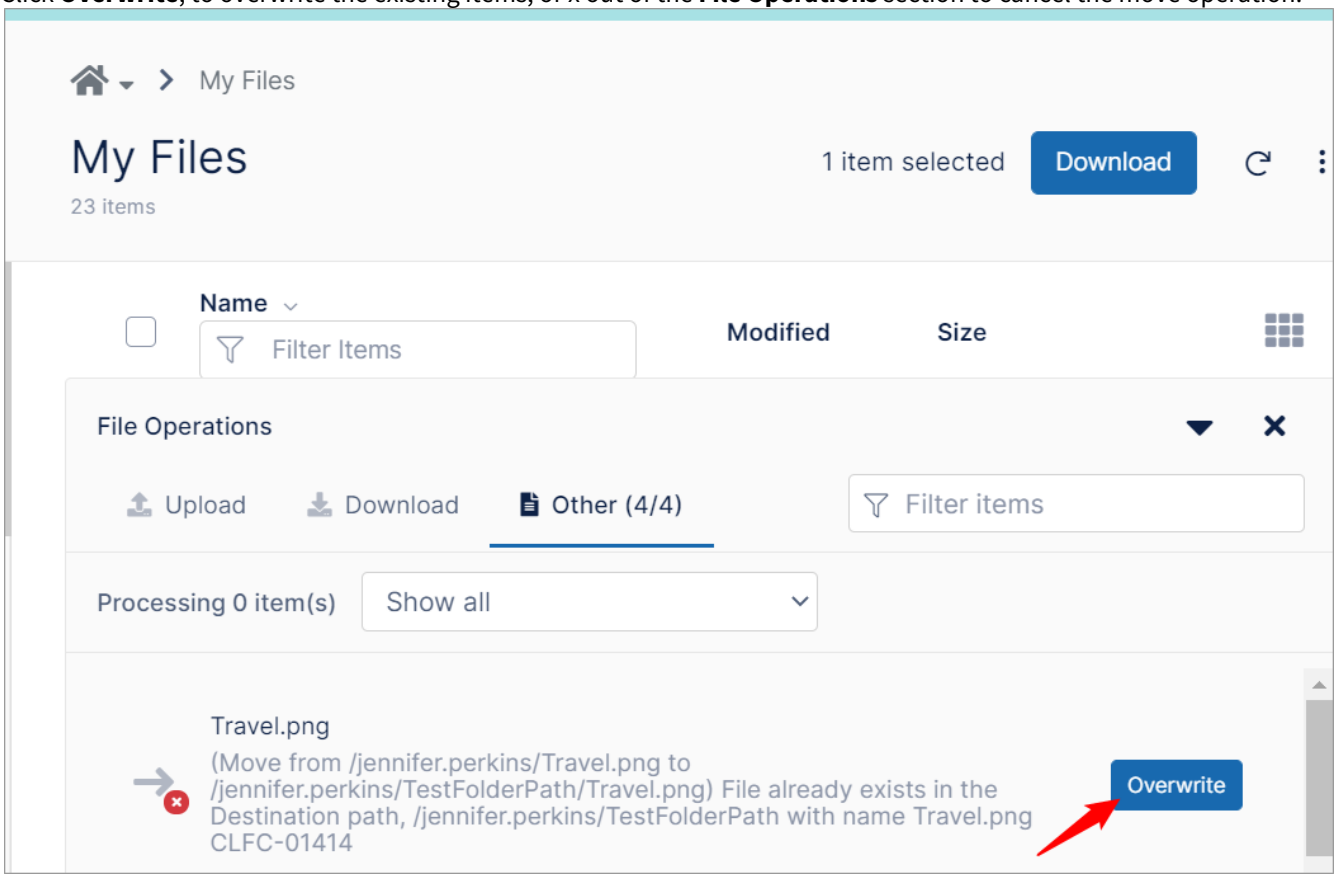
Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Overwriting Items

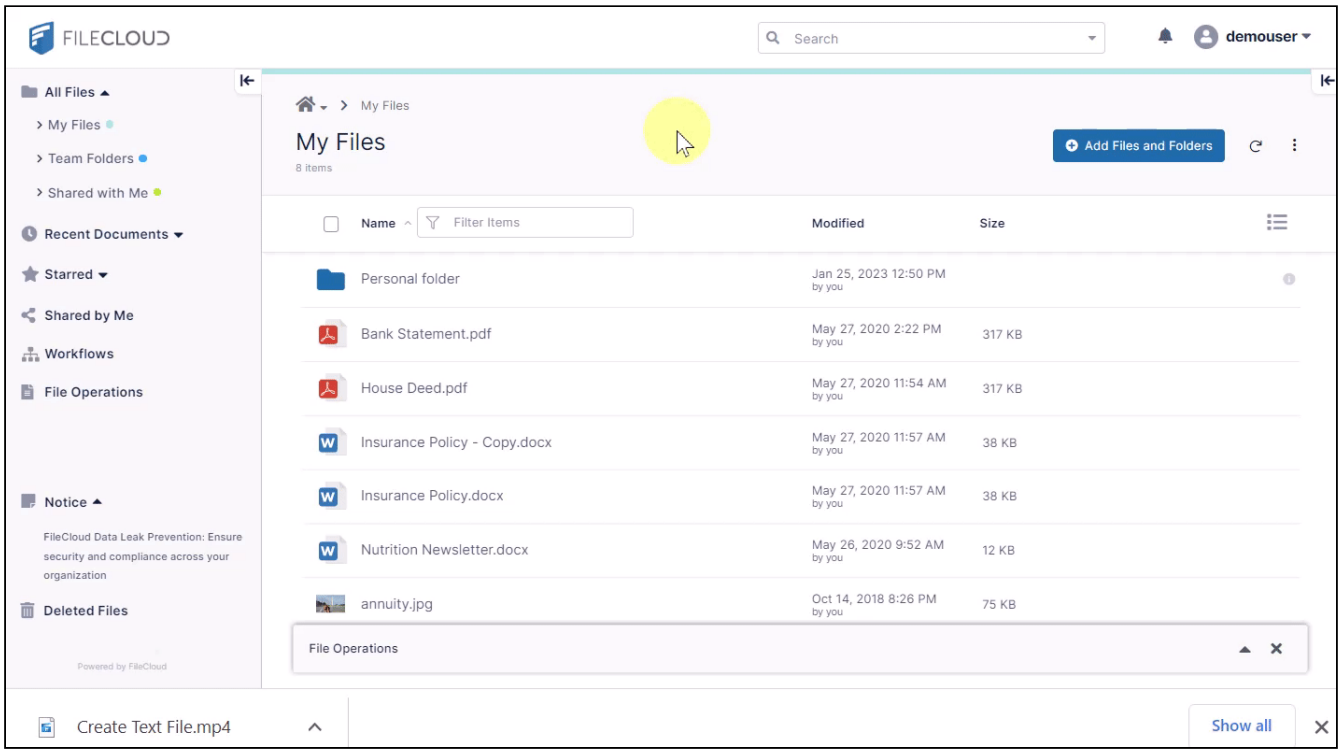
If there are items in the destination with the same name as the items you are moving, the **Files Operations** section opens and asks you to confirm overwriting the existing items.

Click **Overwrite**, to overwrite the existing items, or x out of the **File Operations** section to cancel the move operation.



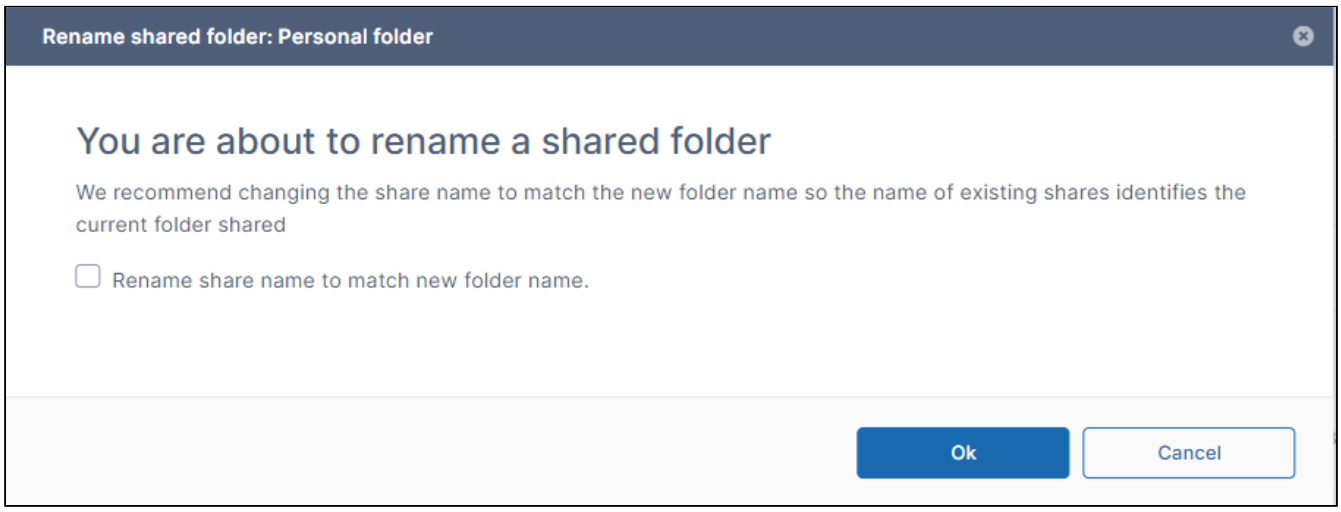
Rename Item

To rename a file or folder, hover over its row and click the **More** button, and select **Rename**. Enter the new name and click Enter.



Renaming a shared folder

If you rename a shared folder, the share name still refers to the original folder name, which may be confusing to users. For this reason, when you rename a shared folder, the following message appears:



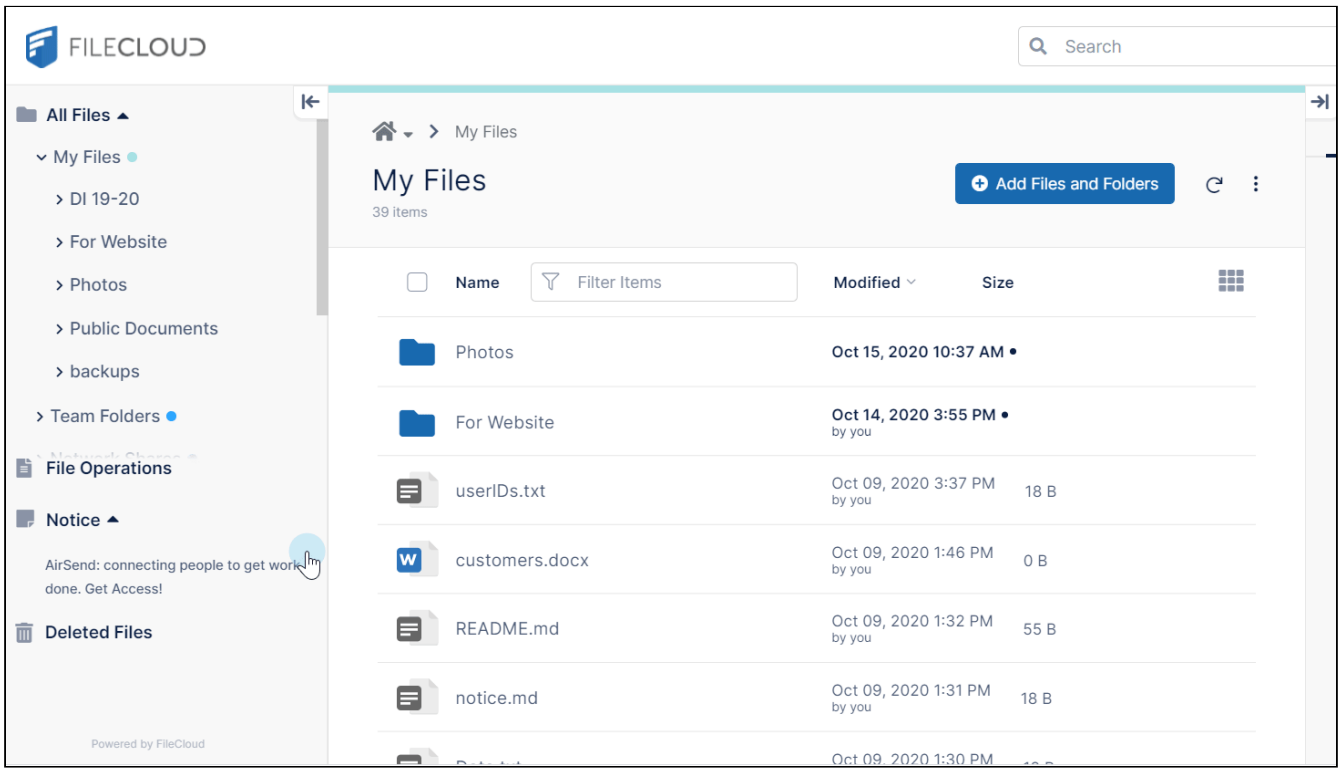
Check the box to rename the share so that it has the same name as the renamed folder.

Download Items

> ⚠ Beginning with FileCloud 23.1, Office files, OpenOffice files, and several other file types can be downloaded as PDFs.

Download a Single Item

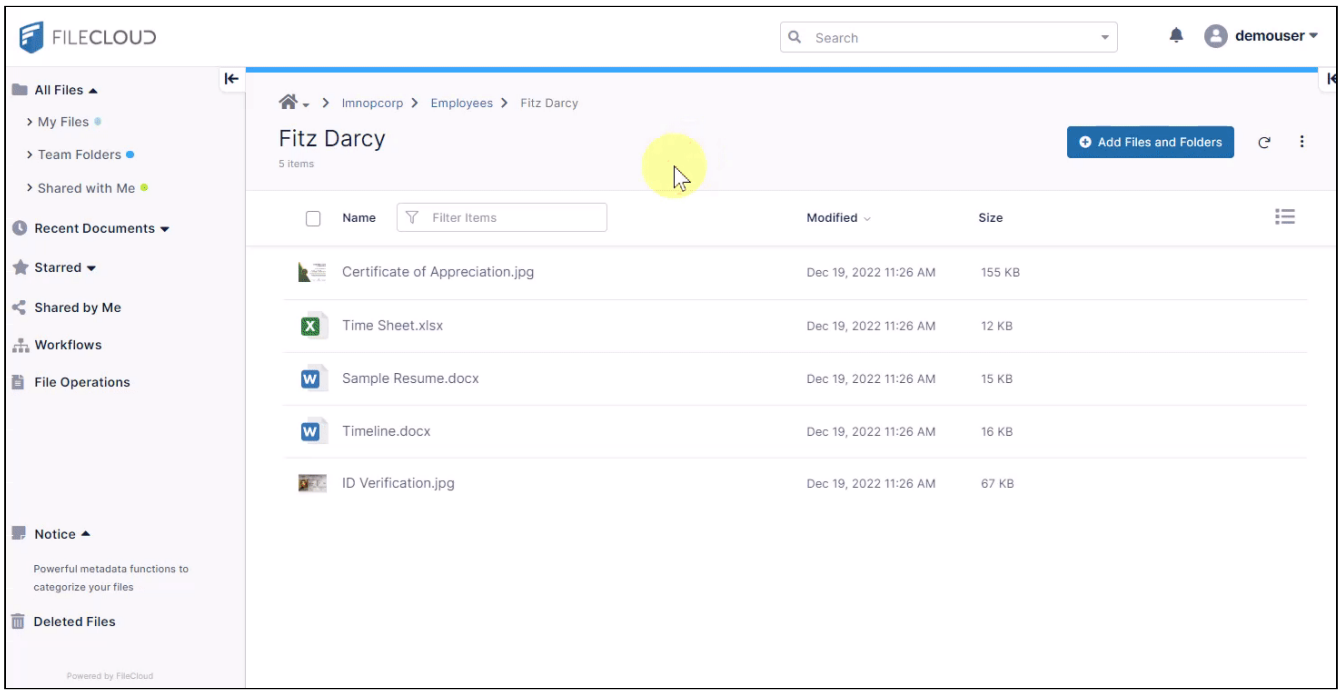
To download a single file or folder, hover over it and click the Download icon. Folders are downloaded as zip files.



Download Multiple Items

To download multiple files or folders, check each item and click **Download** at the top of the screen. The files are downloaded together in a zip file named in the format **<Service Name>-selected-<datestamp>.zip**, where **Service Name** is the name of your FileCloud server.

> You cannot download multiple top level folders in **Shared with Me**.

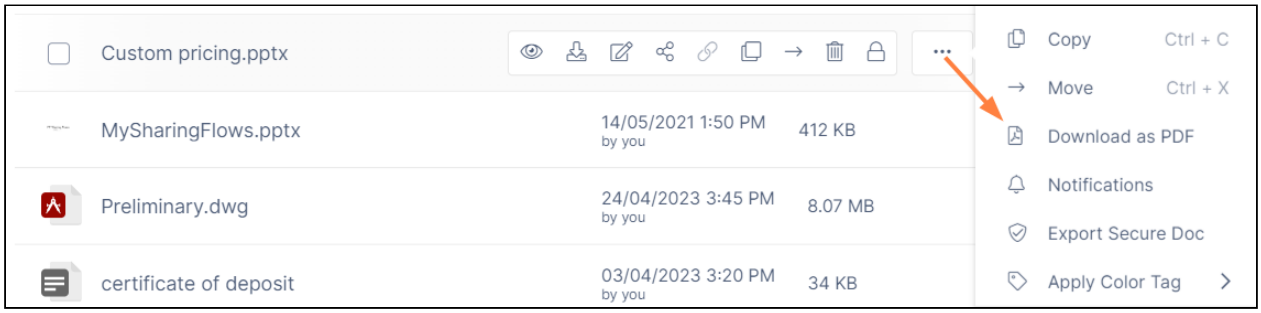


Download as PDF

Office files, OpenOffice files, and several other file types can be downloaded as PDFs. See the list below>

To download and Office file or a text file as a PDF:

1. Hover over the file and click the More icon.
2. Choose **Download as PDF**.



3. The file is downloaded as a PDF.

File types that can be downloaded as PDFs

The following file types can be downloaded as PDFs in FileCloud:

- ai
- pdf
- txt
- doc
- docx
- pdf

- ppt
- pptx
- xls
- xlsx
- xlsm
- odt
- ods
- odg
- odp

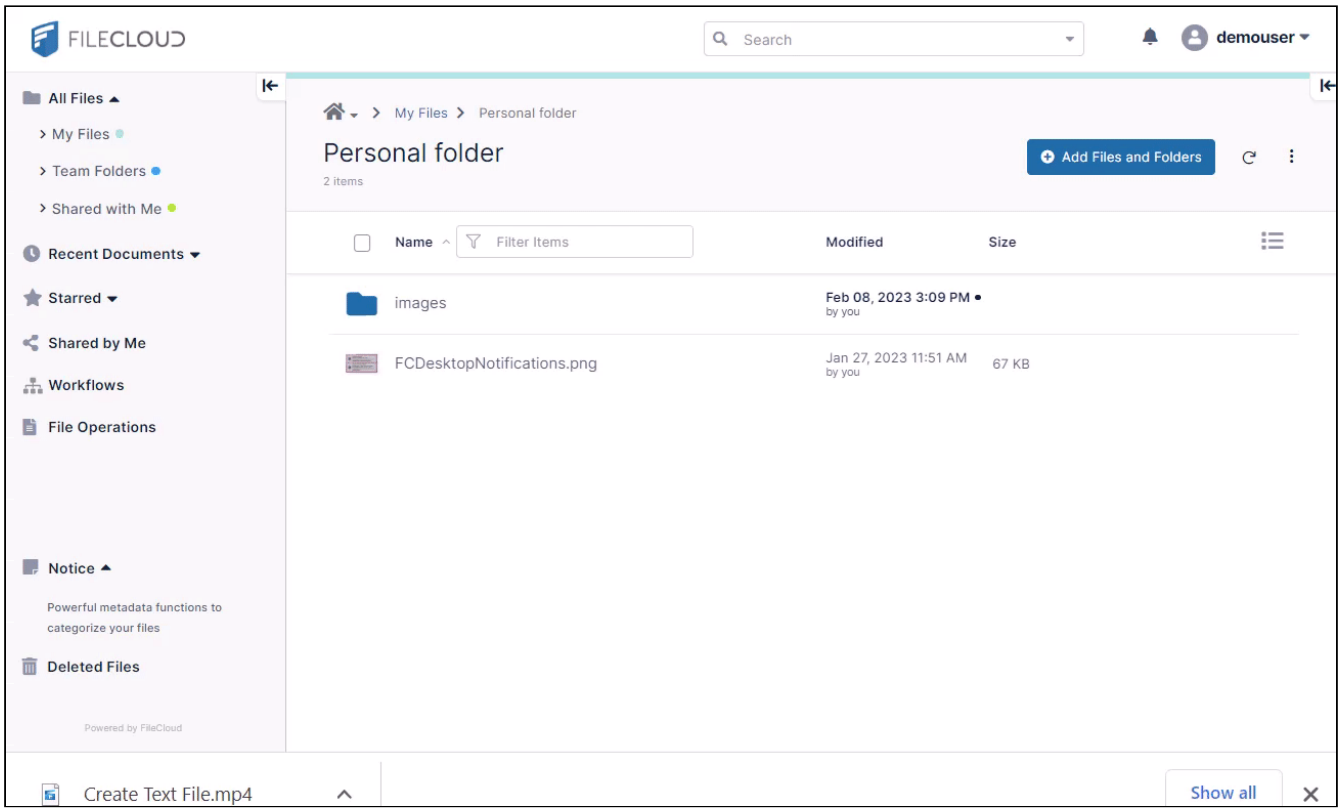
Uploading Items

You can upload a file or folder to FileCloud the following ways:

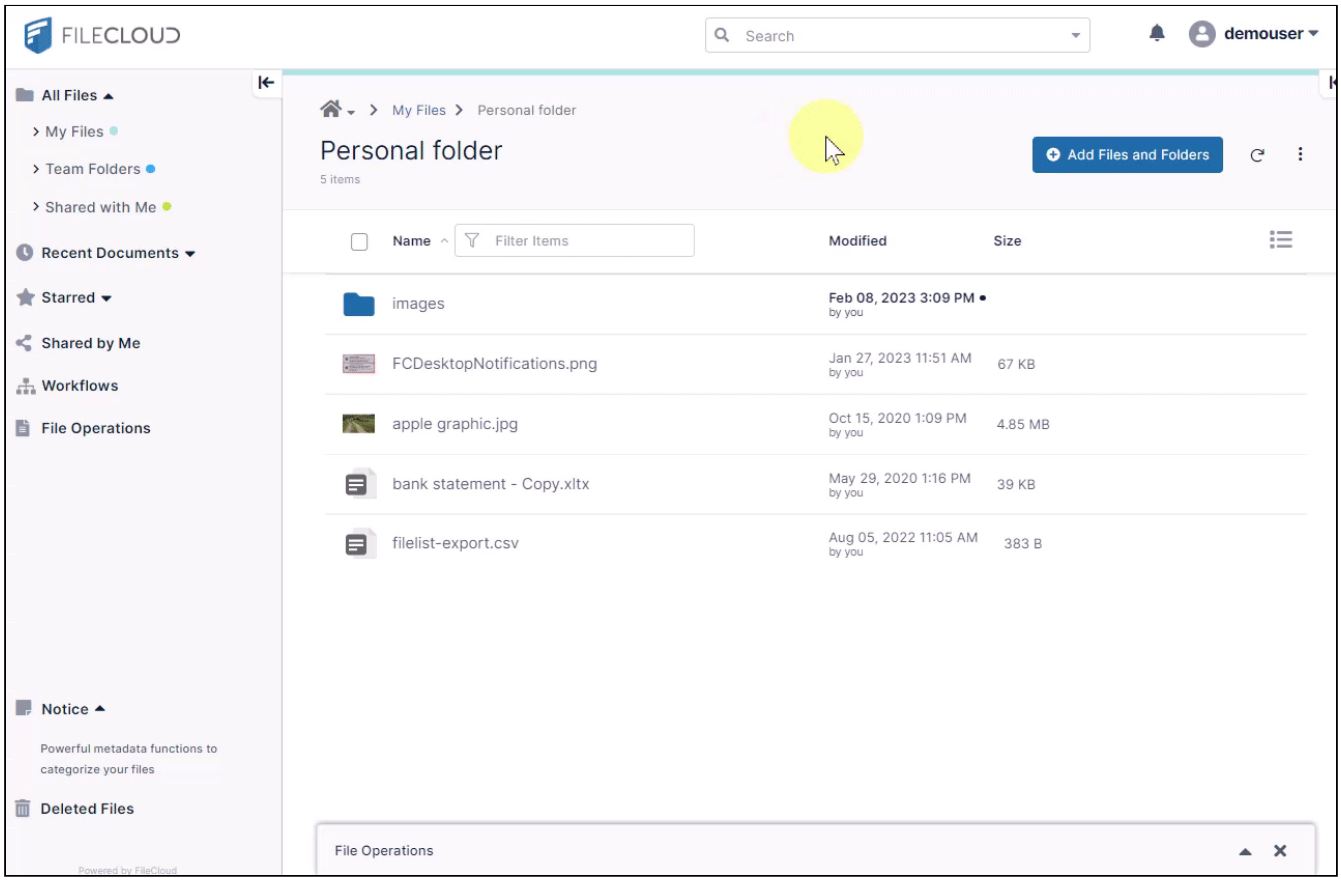
- By dragging and dropping the file or folder onto the FileCloud browser window.
- By opening a folder and clicking **Add Files and Folders** > **Upload File** or **Upload Folder**, then choosing a file or folder.
- By clicking the upload button in the dashboard.

You can view the progress and success of an upload in the File Operations window.

Dragging and Dropping



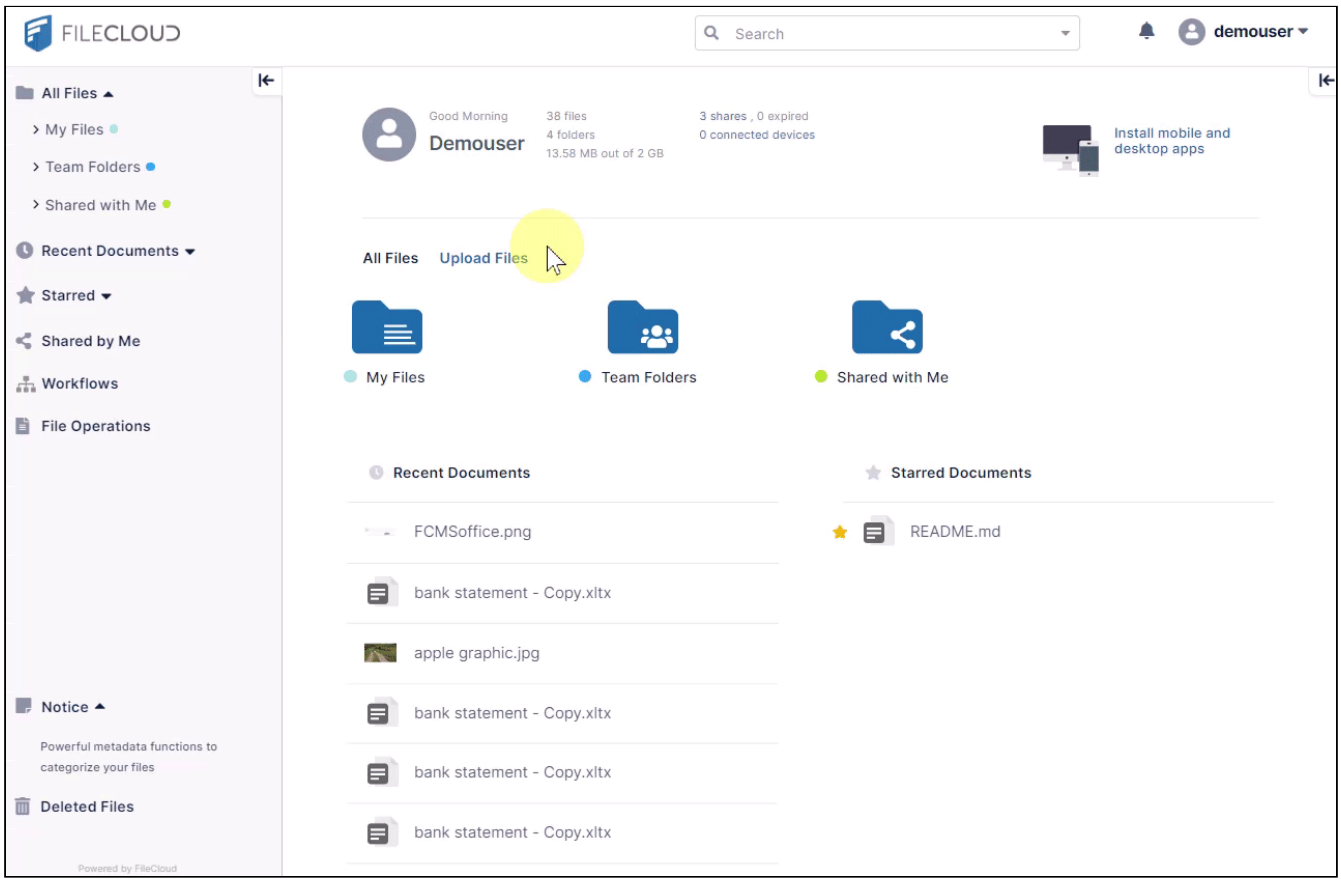
Using Add Files and Folders



Note: You must use drag and drop to upload empty directories since a browser limitation prevents them from being uploaded successfully with **Add Files and Folders**.

Uploading from the Dashboard

The dashboard is the first page you see when you open FileCloud. You can return to the dashboard at any time by clicking All Files in the navigation pane.



Restrictions on Filenames and File Extensions

Please note the following restrictions when uploading files to FileCloud:

- 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.
- FileCloud cannot upload files with leading spaces in the filename.
- By default, files with the extensions **php**, **php5**, **phar**, and **phtml** cannot be uploaded into FileCloud.

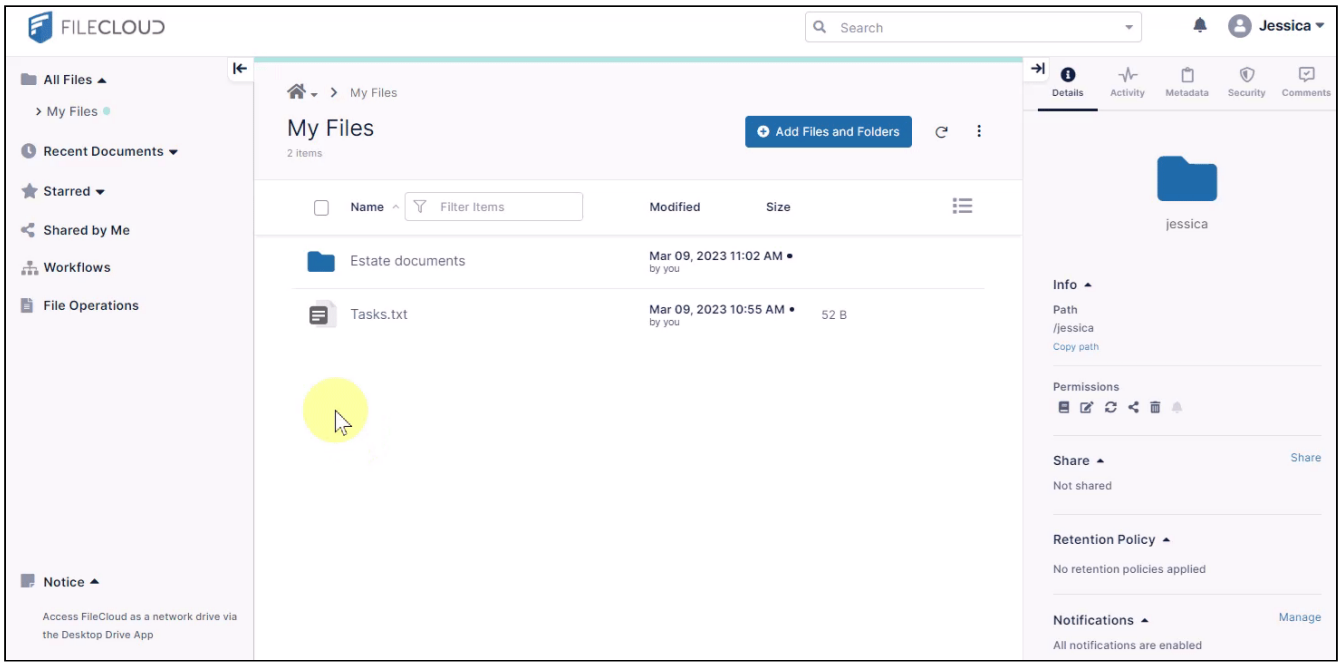
For Admins

- To specify which file extensions may be uploaded into FileCloud, see Managing File Extensions and Restricting File Extensions.
- To restrict certain filenames from being uploaded into FileCloud, see Restricting File Names.

Add to Starred

Your starred items are favorite or frequently visited files and folders that you can access quickly by clicking the **Starred** link in the navigation panel.

To add a file or folder to the **Starred** list, click the star next to it in the main section of the screen. It now appears under **Starred** when you expand it in the navigation panel. Click on a file under **Starred** to preview it. Click on a folder under **Starred** to view its contents in the main section of the screen.



Editing Files

- Web Edit/Open in . . .
- Edit in Desktop
- Edit in Google Apps

Web Edit/Open in . . .

Beginning in FileCloud 22.1, Office extensions .doc, .xls, and .ppt are no longer editable in Web Edit. In Desktop Edit, users may still edit .doc, .xls, and .ppt files.

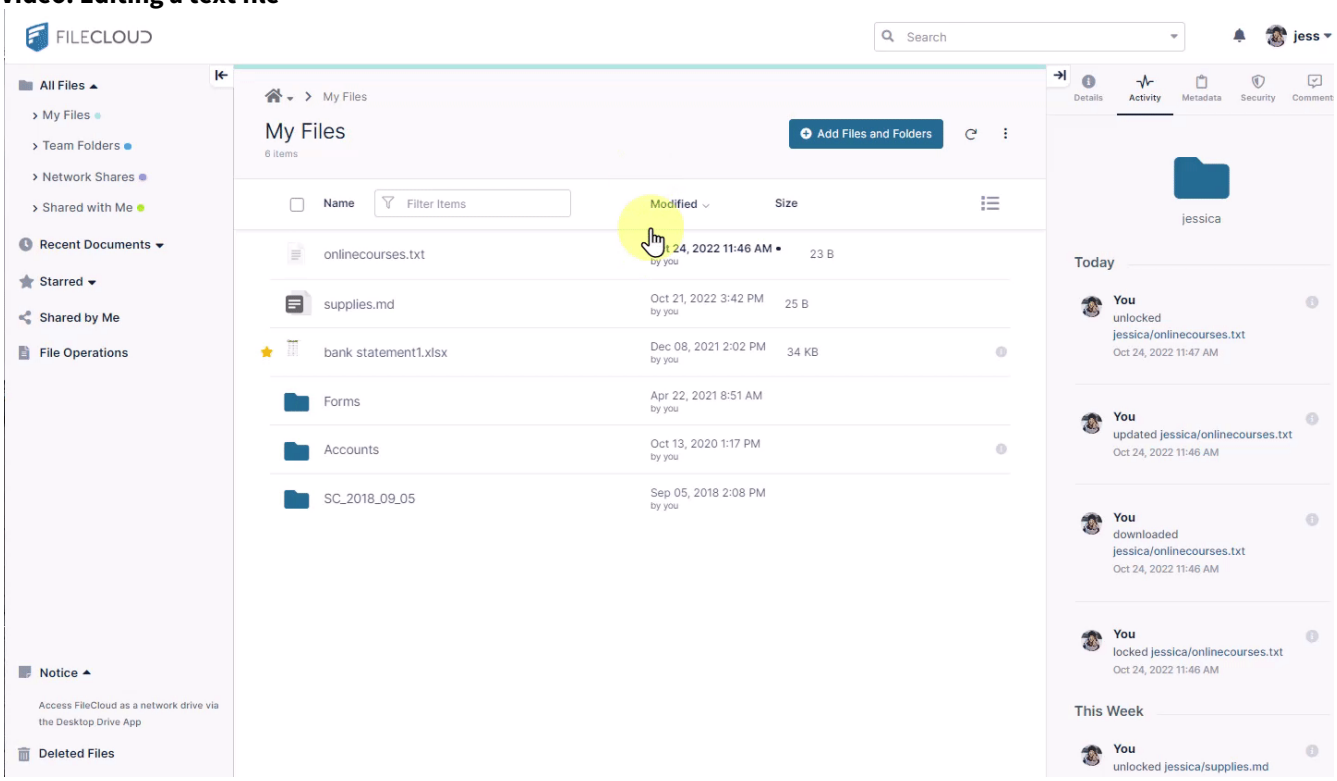
You can edit Office files, text files, markdown files (.md), HTML files, and log files without downloading them from FileCloud. Office file types open in Office Online, and the other file types open in FileCloud's built-in editors.

To perform a Web Edit, hover over the file and click the icon.
For an Office file type, the icon or menu option reflects the external editor available for the file with Web Edit. For non-Office file types, the icon or menu option appears as **Edit Online**. Clicking opens the file in FileCloud's built-in editor.

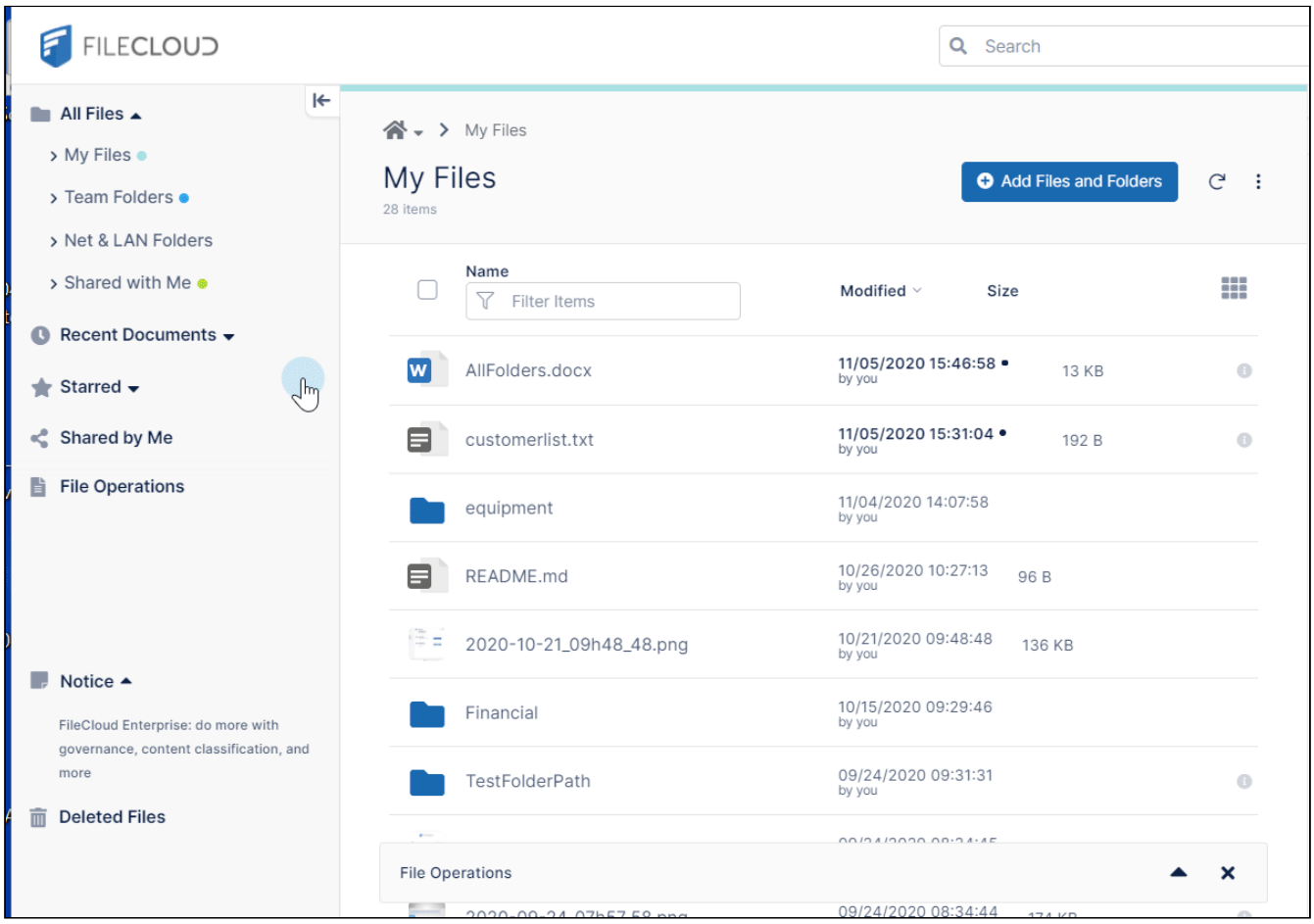
(For both Office and non-Office files, if the Edit in Desktop feature is enabled, you also see the **Open in Desktop** option, which downloads the file and opens it in its native application, then automatically uploads it to FileCloud when you save it.)

If Web edit or Desktop edit is not available for a file type, the icon appears disabled.

Video: Editing a text file



Video: Editing in Office Online



Edit in Desktop

The Edit in Desktop feature enables you to download a file and edit it in its native application. Then it automatically updates the file in FileCloud so that the change is immediately visible.

> In order to use Edit in Desktop, you must have the **Desktop Edit** application (or **FileCloud Sync**) installed and running.

> When you edit files by clicking **Edit Online/Open in [app]** they open in Office Online or another editor associated with them in FileCloud; when you edit them by clicking **Open in Desktop** they open in your desktop application that is associated with them.
> Desktop Edit and FileCloud Sync cannot be open at the same time.

Edit in the Desktop with Desktop Edit vs. Sync

FileCloud Sync also supports the Edit in Desktop feature. However, there are differences in what each application offers.

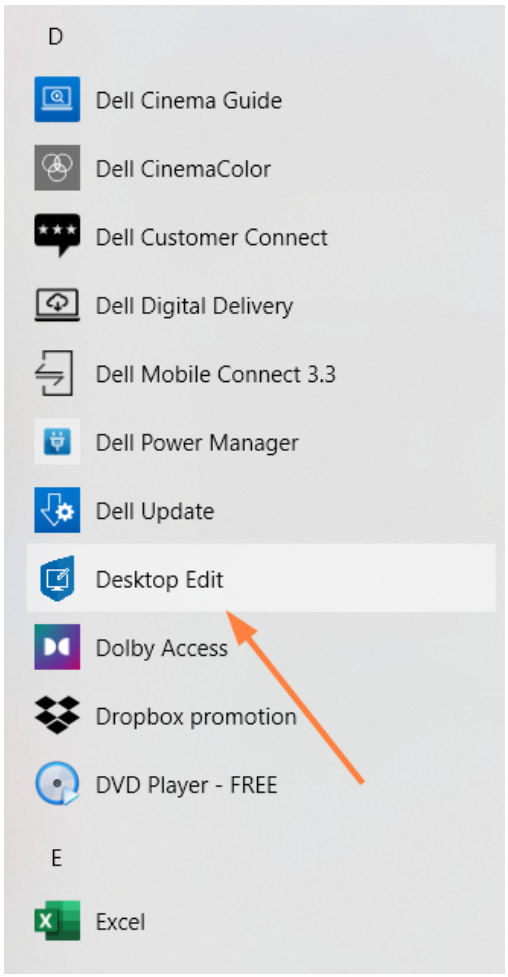
Desktop Edit	Sync
• Provides an interactive dashboard for Edit in Desktop files.	• All support is provided in the background. No interactive dashboard for Edit in Desktop files.
• A simple application whose main function is to support the Edit in Desktop feature.	• A more complex application which provides much more functionality than the Edit in Desktop feature. See FileCloud Sync

Note that both **Sync** and **Desktop Edit** cannot be run at the same time.

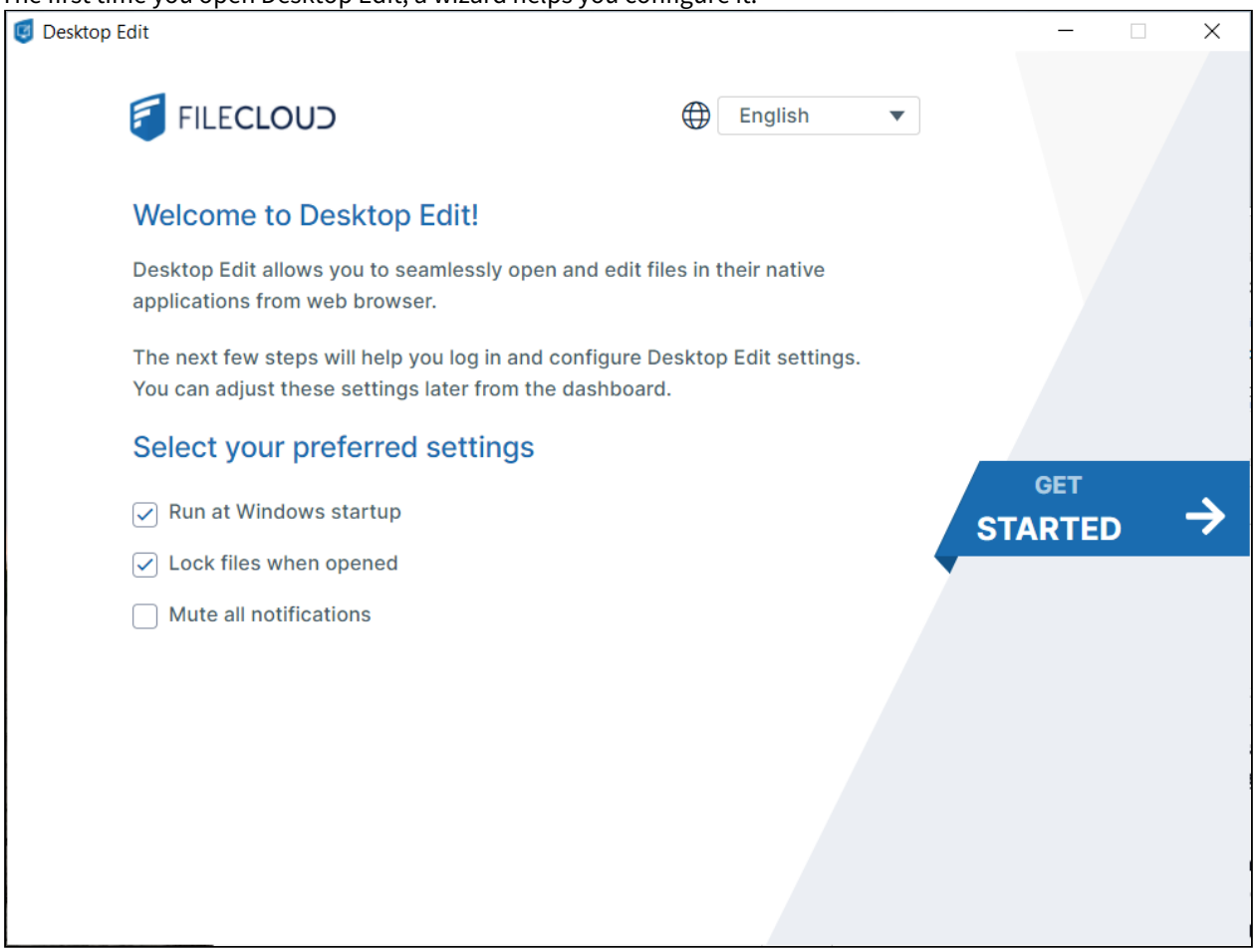
Working with Desktop Edit

Installing and configuring Desktop Edit

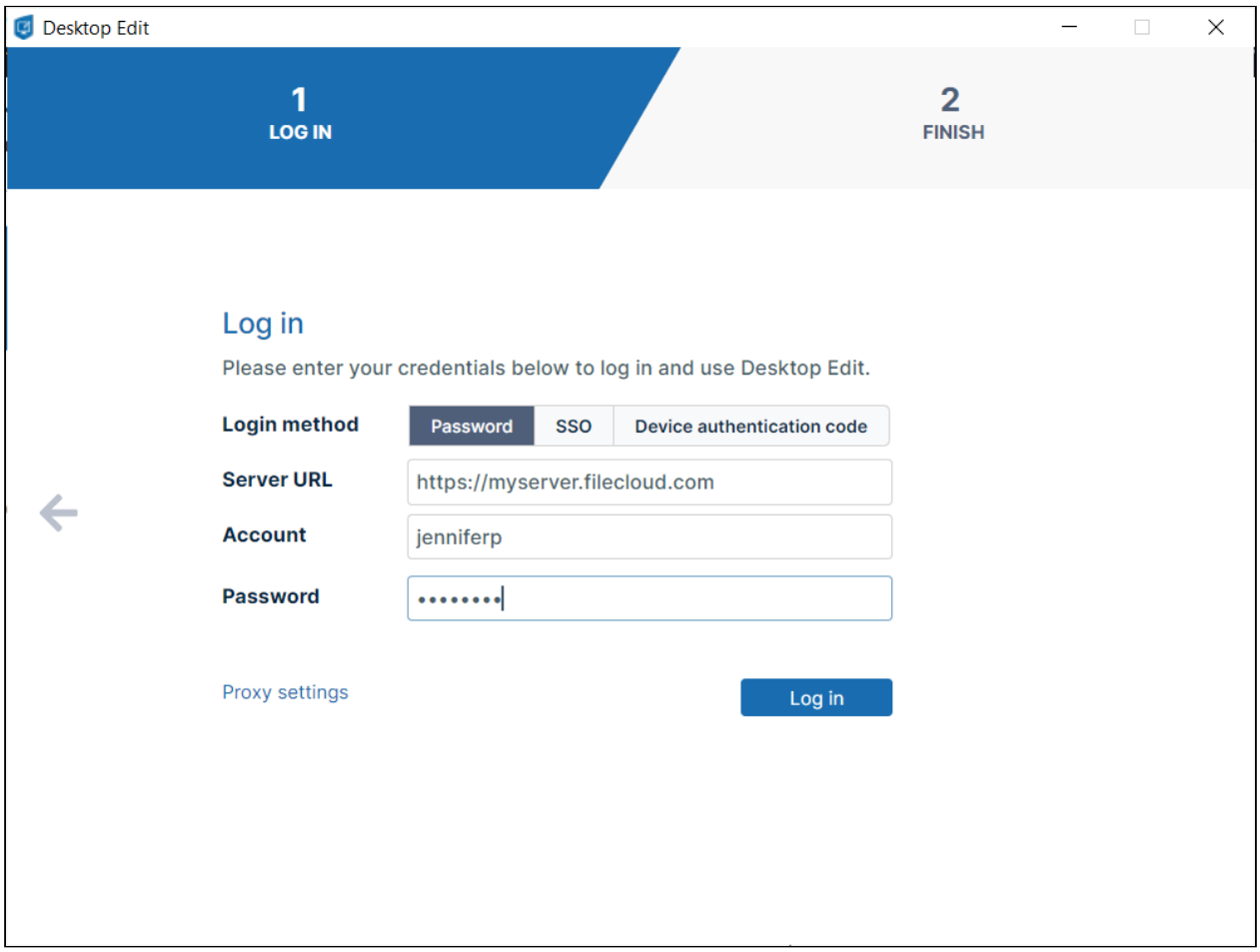
1. Click one of the following links to download the Desktop Edit installation file:
   FileCloudDesktopEditSetup.exe
   FileCloudDesktopEditInstaller.pkg
2. Install Desktop Edit.
3. When the installation is complete, open Desktop Edit.
   If you don't open Desktop Edit from the installation wizard, you can open it by going to the Start menu and clicking the Desktop Edit icon:


D
Dell Cinema Guide
Dell CinemaColor
Dell Customer Connect
Dell Digital Delivery
Dell Mobile Connect 3.3
Dell Power Manager
Dell Update
Desktop Edit
Dolby Access
Dropbox promotion
DVD Player - FREE
E
Excel

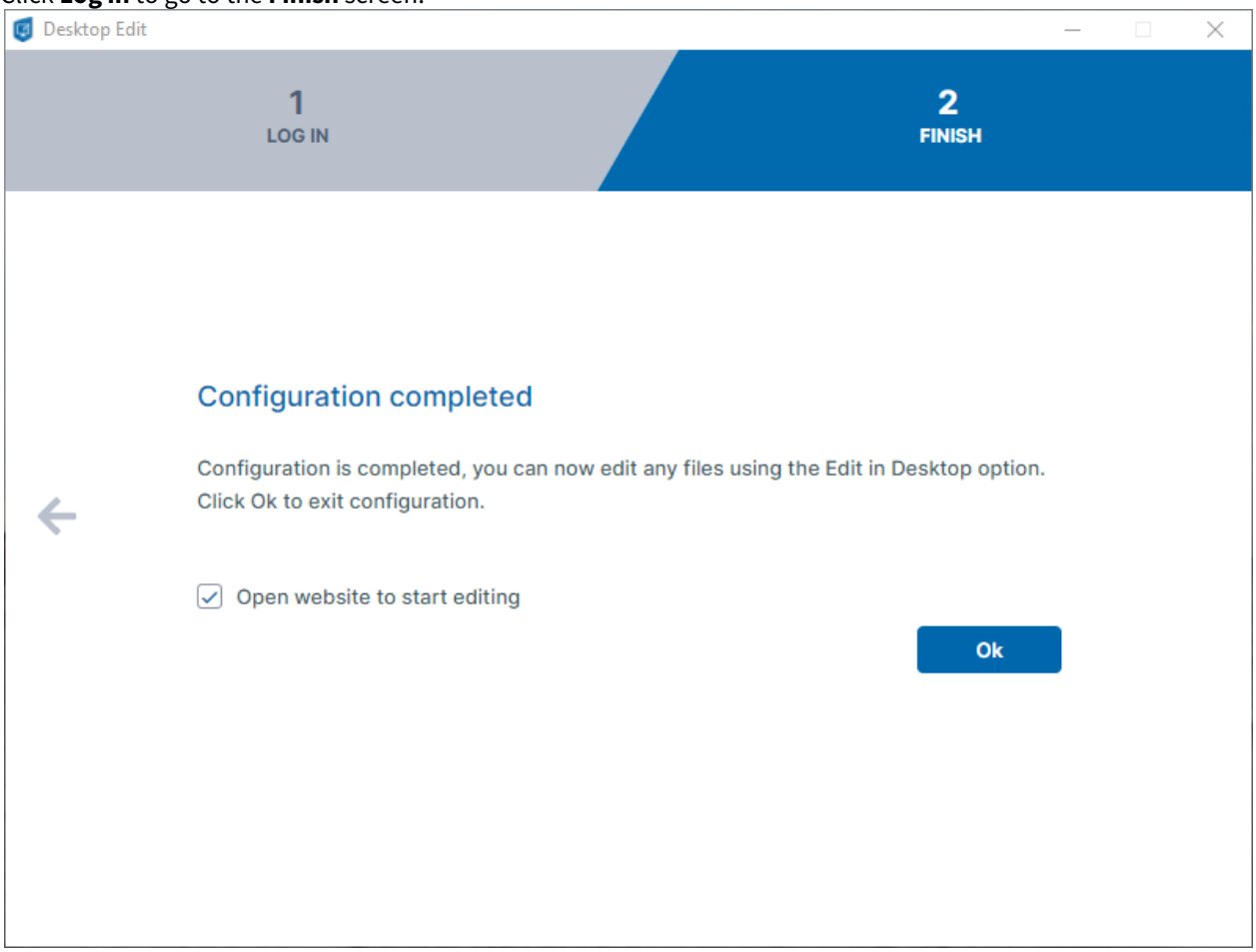
The first time you open Desktop Edit, a wizard helps you configure it.



4. In the initial wizard screen, you may change your language and enable or disable the following options:
   - **Run at Windows startup** - Automatically run Desktop Edit when you log in to your computer. Enabled by default.
   - **Lock files when opened** - Block other users from opening FileCloud files when you have opened them. Enabled by default.
   - **Mute all notifications** – Do not receive messages about file changes and other actions that occur in Desktop Edit. Disabled by default.
5. Click **Get Started** to go to the **Log In** screen.
6. Choose a **Login Method** and enter your credentials.
   See Help with login methods, below, for help using each login method.

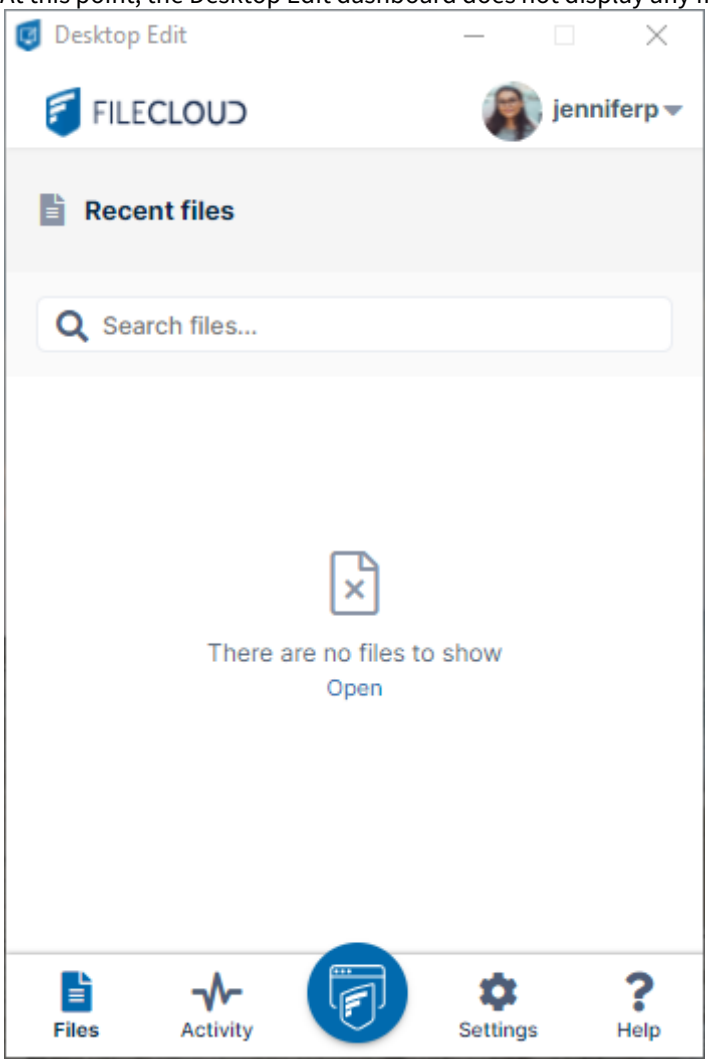

Desktop Edit
1
LOG IN
2
FINISH
Log in
Please enter your credentials below to log in and use Desktop Edit.
Login method
Password
SSO
Device authentication code
Server URL
https://myserver.filecloud.com
Account
jenniferp
Password
Proxy settings
Log in

7. Click **Log in** to go to the **Finish** screen.



8. Leave **Open website to start editing** checked to open the FileCloud user portal and the Desktop Edit dashboard now, and click **Ok**.

At this point, the Desktop Edit dashboard does not display any files:

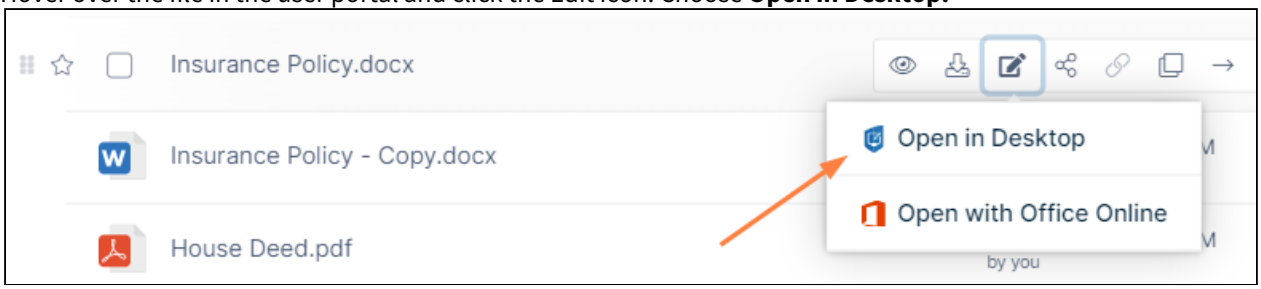


Using Edit in Desktop in the FileCloud User Portal

The Edit in Desktop option in the user portal appears as **Open in [application name]**, from the edit icon or in the context menu for the file. If there is no associated application in your desktop, it appears as **Edit in Desktop**.

To edit a file in the desktop:

1. Open the Desktop Edit dashboard and the FileCloud user portal.
2. Hover over the file in the user portal and click the Edit icon. Choose **Open in Desktop.**

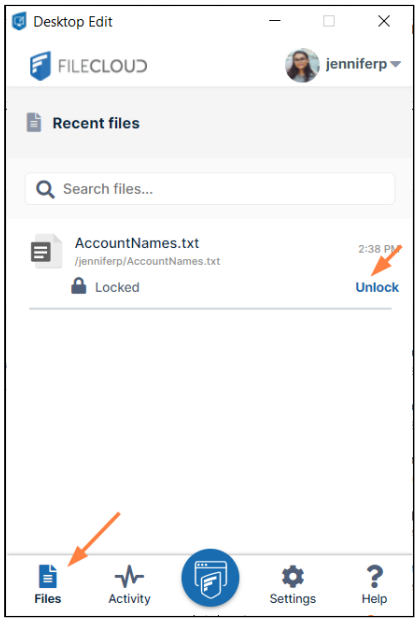
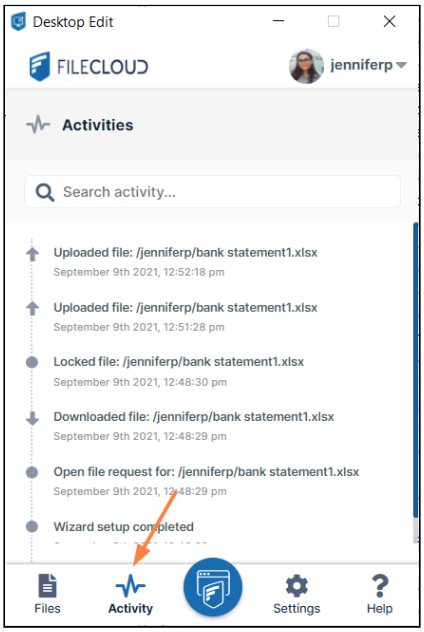
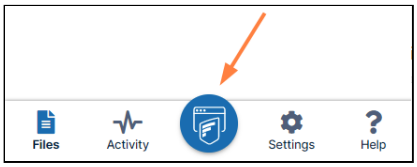


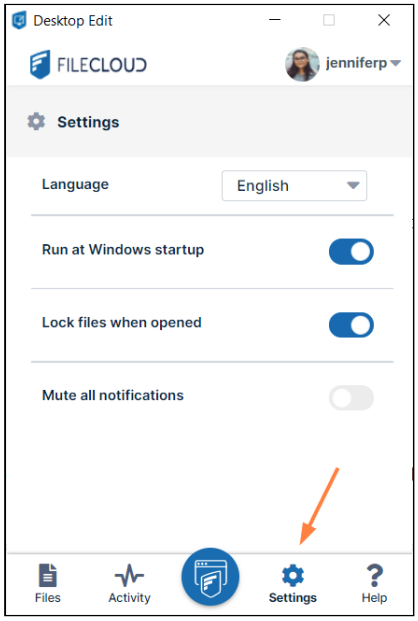
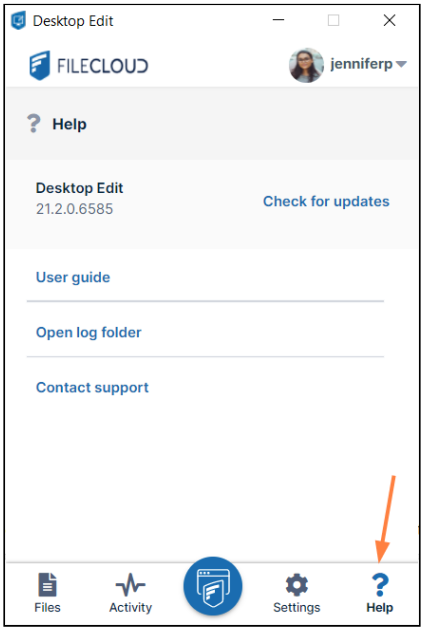
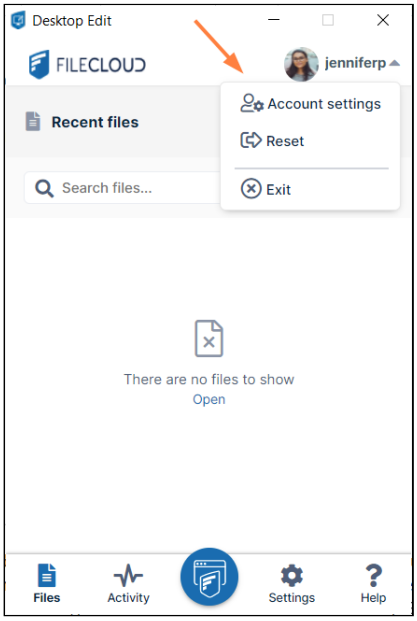
The file opens in the application you have associated it with in your desktop, or prompts you to choose an application to open it with.

3. Make edits to the file and save it.
   Desktop edit automatically updates the file in the user portal with the edits you have made.
   Auto-unlock is not supported in Desktop Edit; the file must be unlocked from the Desktop Edit dashboard. See **Using the Desktop Edit Dashboard**, below.

Using the Desktop Edit dashboard

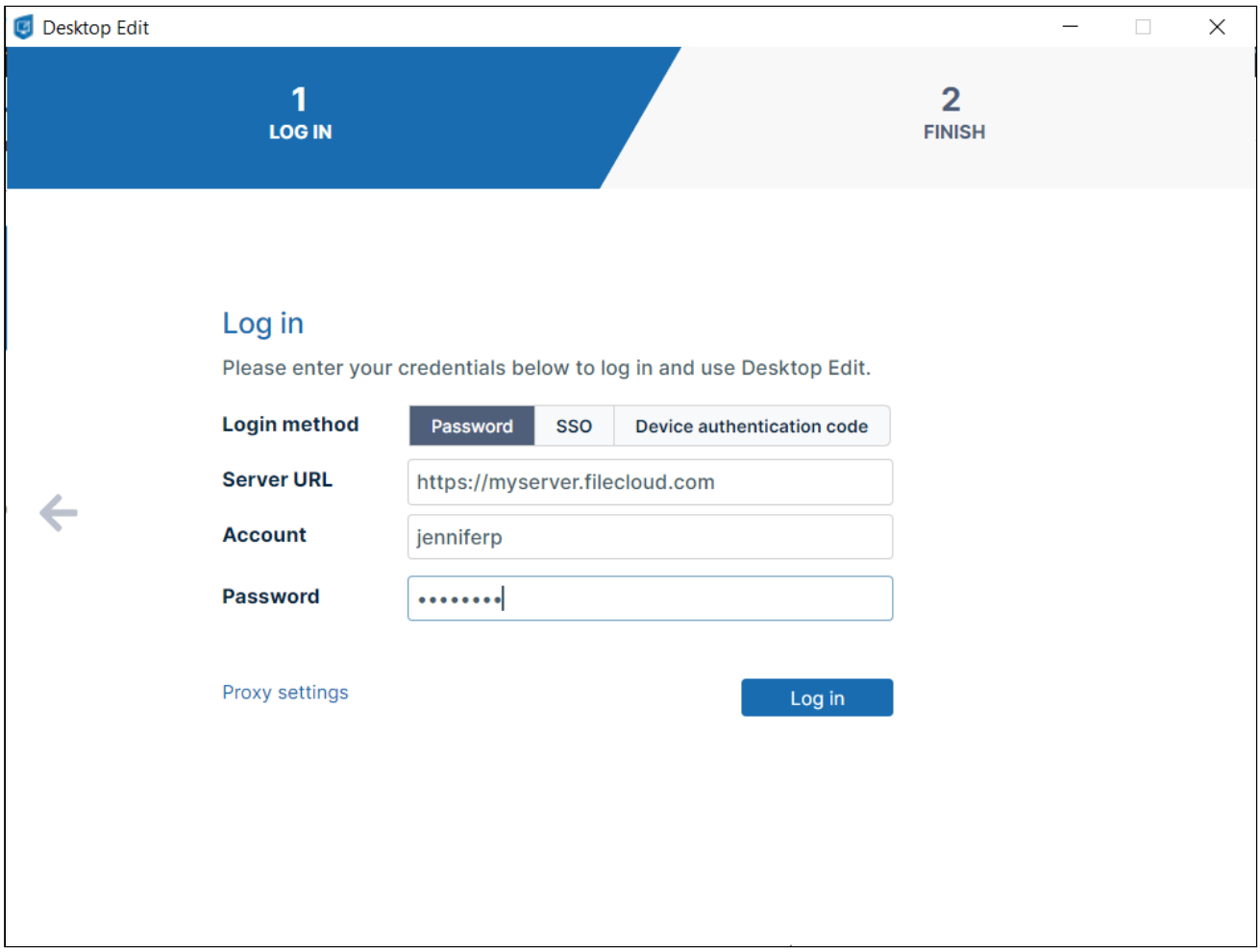
You can monitor and view the history of your Desktop Edit actions as well as change Desktop Edit settings, get help, and open files directly from the Desktop Edit dashboard.

To view and open recently opened files:	**To see Desktop Edit activities:**	**To open the user portal:**
You can see which files you have recently opened by clicking the Files icon at the bottom of the Desktop Edit dashboard. Click the name of a file to open it in its editor again. The user portal does not have to be open. Auto-unlock is not supported for files in Desktop Edit. (Desktop Edit unlocks files when you exit the application.) Use the **Unlock** link in the Desktop Edit dashboard to unlock a file after it's been opened.	You can see a record of your activities in Desktop Edit by clicking the Activity icon at the bottom of the Desktop Edit dashboard.	If the user portal is closed, you can open it from Desktop Edit by clicking the Open Website icon at the bottom of the Desktop Edit dashboard.
		

To change settings: You can change your Desktop Edit settings by clicking the Settings icon at the bottom of the Desktop Edit dashboard. For help with the settings, see Installing and configuring Desktop Edit, above.	**Getting help and updating Desktop Edit:** To access help documentation or contact support, review log files, or check for Desktop Edit updates, click the Help icon at the bottom of the Desktop Edit dashboard.	**To change credentials or exit Desktop Edit:** To modify your login credentials, reset Desktop Edit, or exit the application, choose the option in the user drop-down menu. If you reset, you must configure your login and settings in the Setup Wizard again.
		

Help with login methods

Use the following instructions to help you choose your login method and enter your credentials when you are setting up Desktop Edit for the first time in the following screen, as explained above in Installing and configuring Desktop Edit.

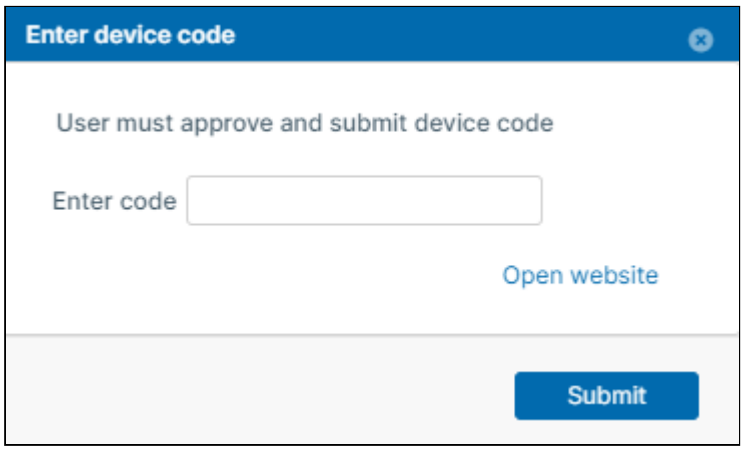


For **Login Method**, leave the default of **Password**, or choose SSO or **Device Authentication Code**.

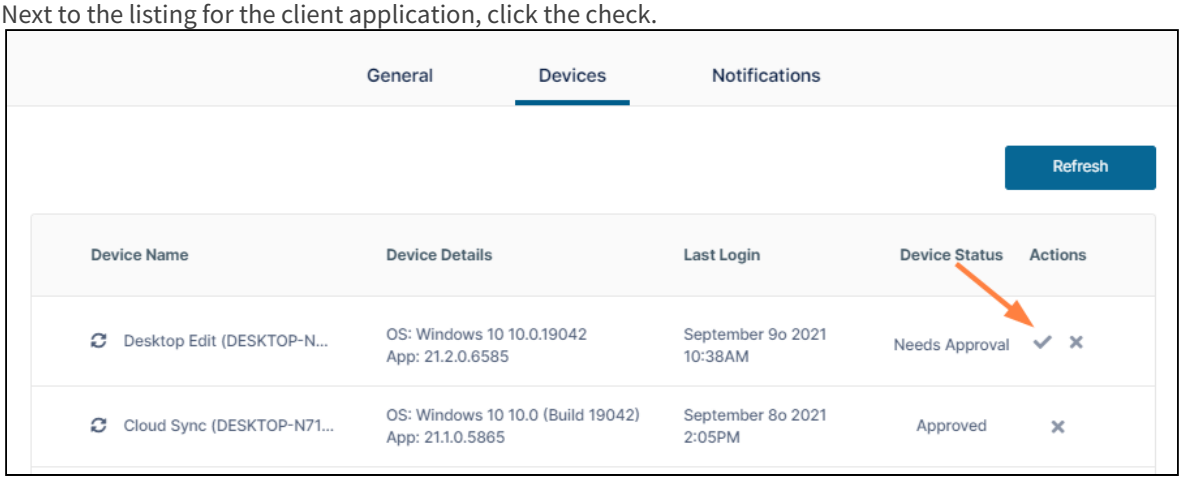
- If you use **Password:**
  a. In **Server URL**, type the address of your FileCloud server.
  b. In **Account** and **Password**, type in the credentials that were sent to you when your FileCloud account was created.
  c. Click **Log in**.

- If you choose **SSO** (single sign-on)**,** type the address of your FileCloud server.
  You are redirected to the **SSO Login** page, where you can enter your username and SSO password to log in.

- If you choose **Device Authentication code**,
  a. In **Server URL**, type the address of your FileCloud server.
  b. In **Account**, type in the username that was sent to you when your FileCloud account was created.
  c. Click **Log in**.
  An **Enter Device Code** dialog box opens.



d. Click **Open Website**.
   The login screen of the user portal opens.
e. Log in to the user portal.
f. In the upper-right corner of the screen, click your username and choose **Settings**.
g. In the **Settings** screen, click **Devices**.
h. Next to the listing for the client application, click the check.



   A dialog box with the device authentication code opens.
i. Enter the authentication code into the **Enter Device Code** dialog box, and click **Submit**.

- Or enter Proxy settings.

Edit in Google Apps

Beginning with FileCloud 21.3, you may also have the option of web editing Office files in Google Apps applications. If editing in Google Apps is set up in your FileCloud system, you can edit docx, xlsx, and pptx files in the corresponding Google Docs, Google Sheets, or Google Slides application.

In FileCloud's mobile apps, files can be viewed but not edited in Google Apps.

- Editing of some large files is not supported in Google Apps. See Files you can store in Google Drive for specific size limitations.

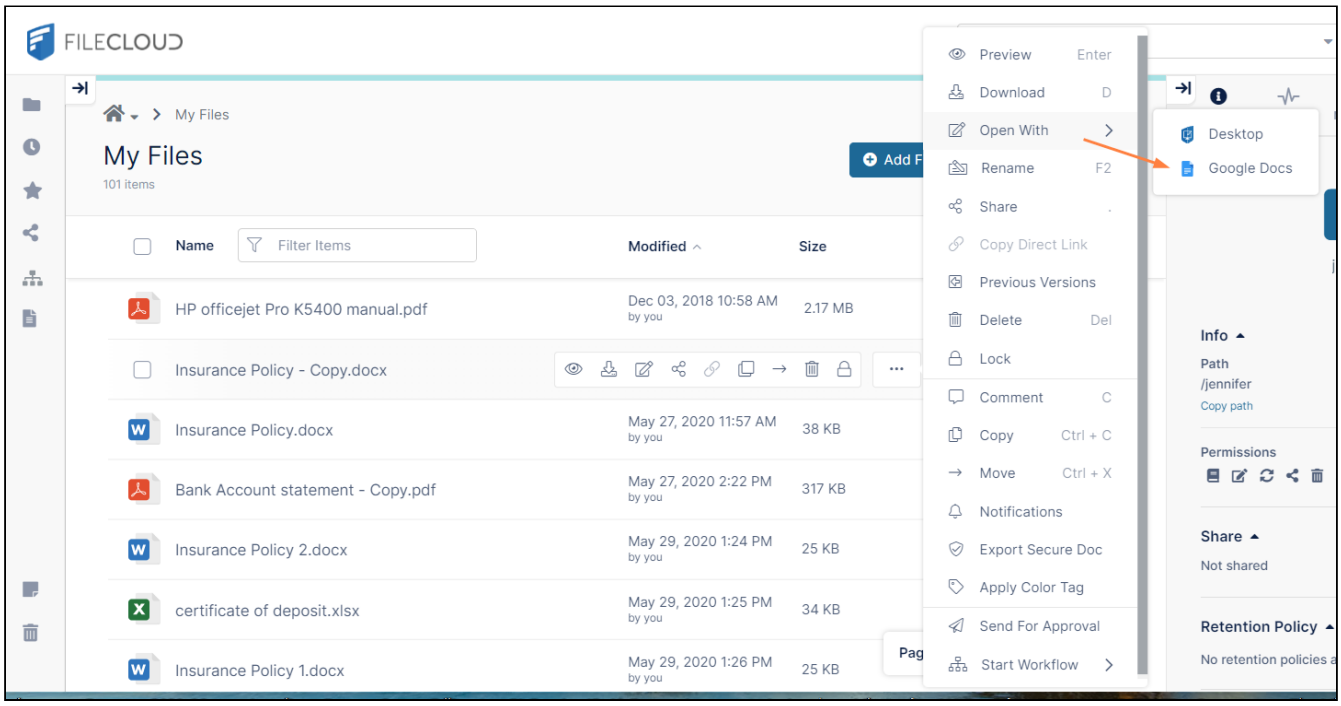
- To open a Google Apps editor in incognito windows, you may first have to grant Google Docs the correct permissions or unblock third party cookies.

If Google Apps are enabled for web edit, when you click the edit icon in the row for one of these file types you are given the **Edit in Google [app]** option (as well as any other available edit option):

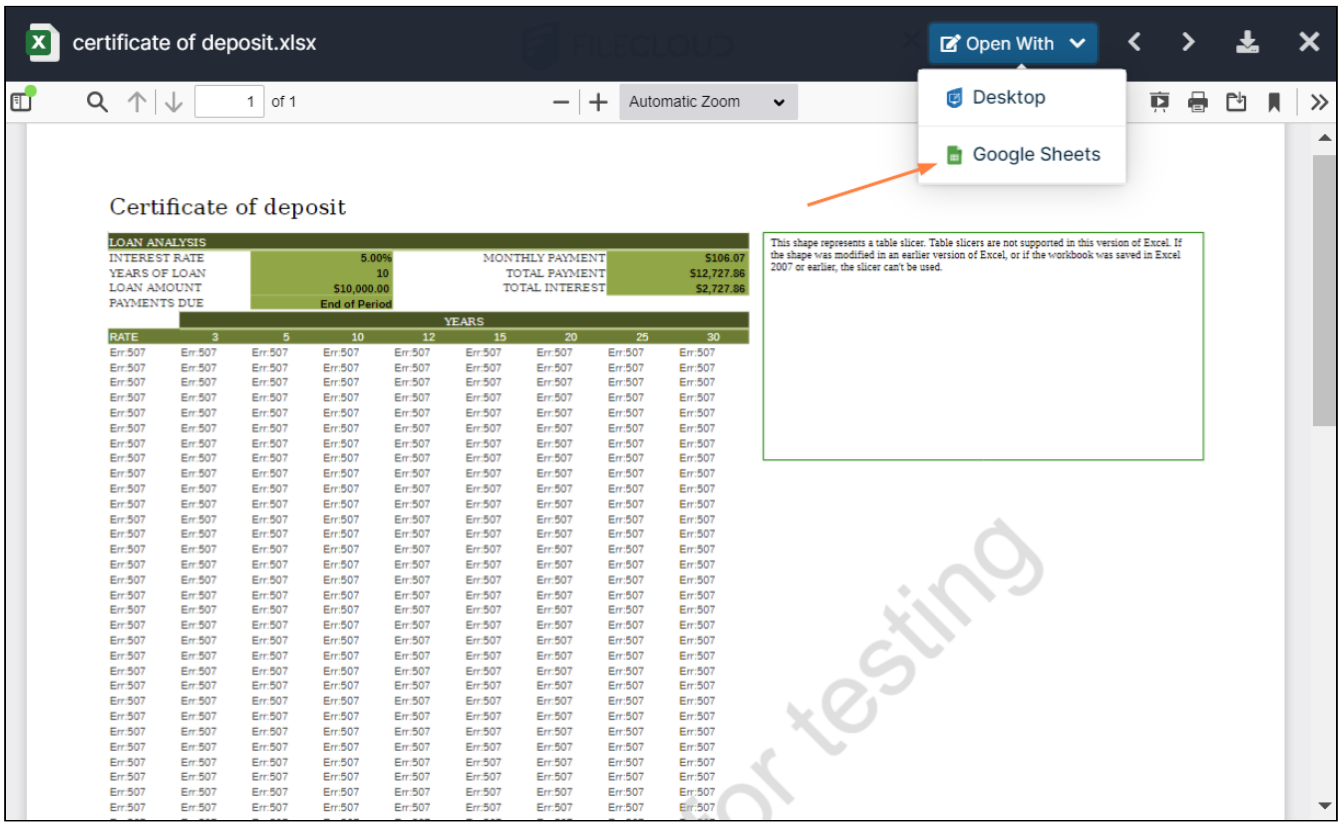
Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

For these file types, the **Open with Google** options also appear in context menus and as editing choices in previews:



Google App option in context menu



Google App option in file preview

Working with Zip Files

Creating zip files and working with zip file content is available beginning in FileCloud Version 22.1.

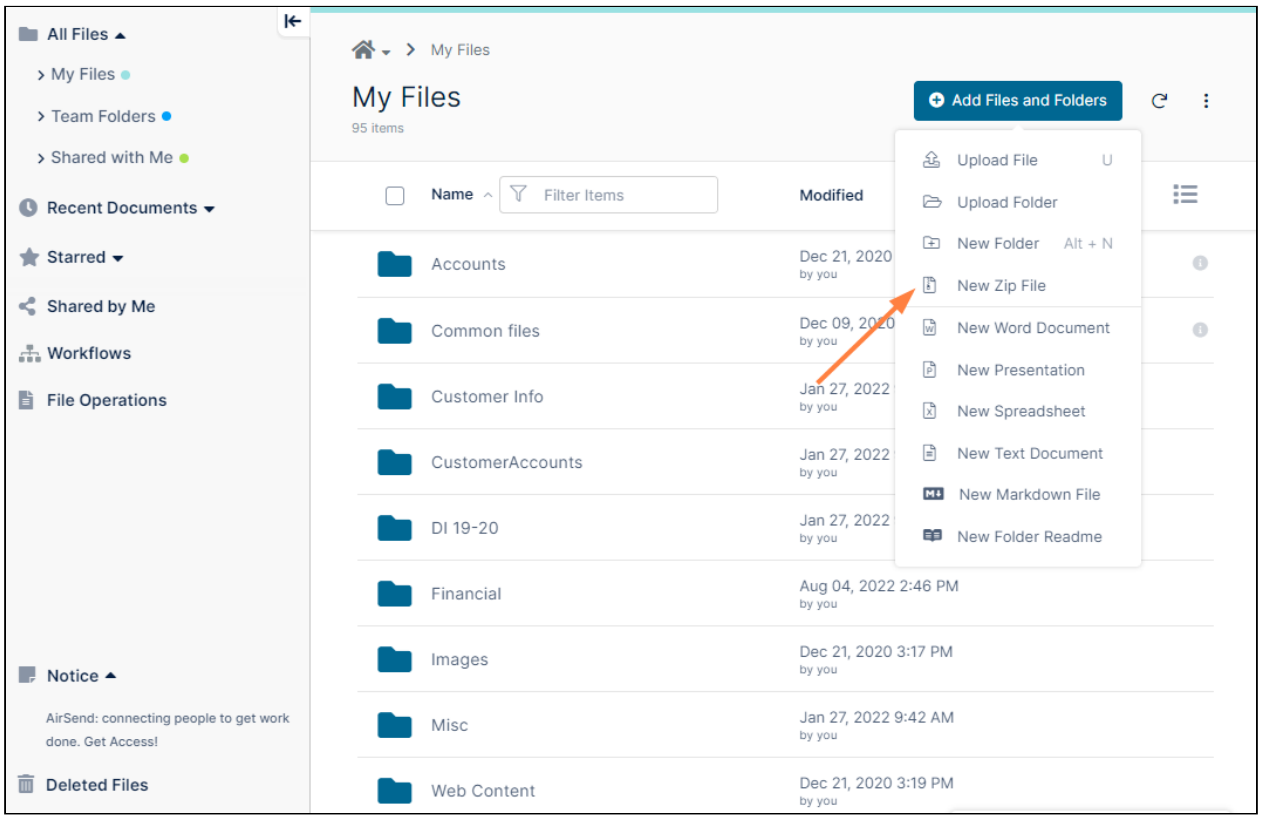
You can create and upload zip files into your My Files folder.

You can preview, download, add, and delete contents of a zip file that you add or upload. Note that you cannot upload zip files of more than 4 GB into FileCloud, and zip files that you create in FileCloud must be less than 100 MB.

To create zip files in FileCloud as Zero Trust, you can add a password that must be entered by you or anyone you share the zip file with to access it. By default, after the password is entered the first time during a log-in session, it does not have to be entered again during that session. However, your administrator may disable this option.

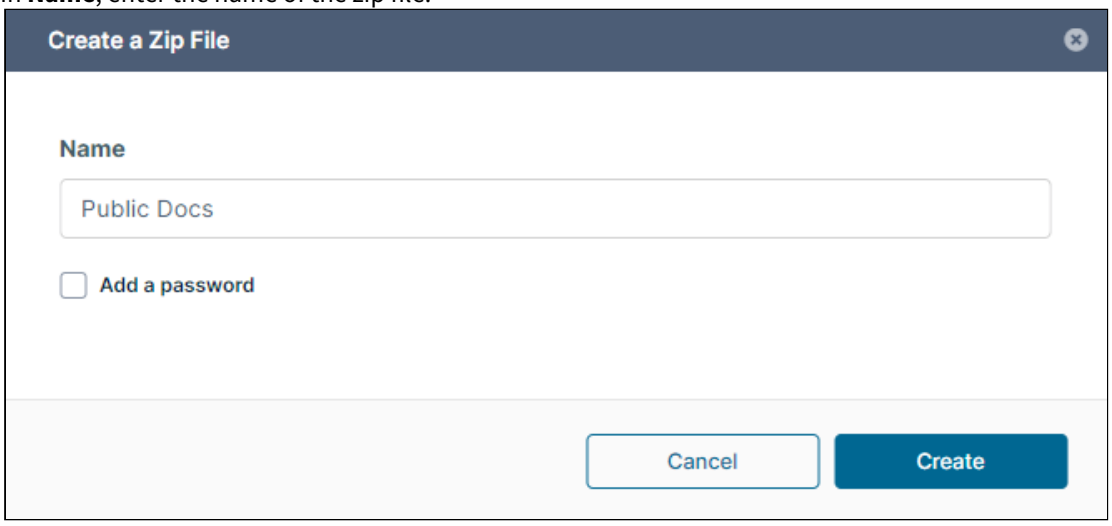
To create a zip file

1. Log into the user portal and select My Files in the navigation panel.
2. Click **Add Files and Folders**, and choose **New Zip File**.



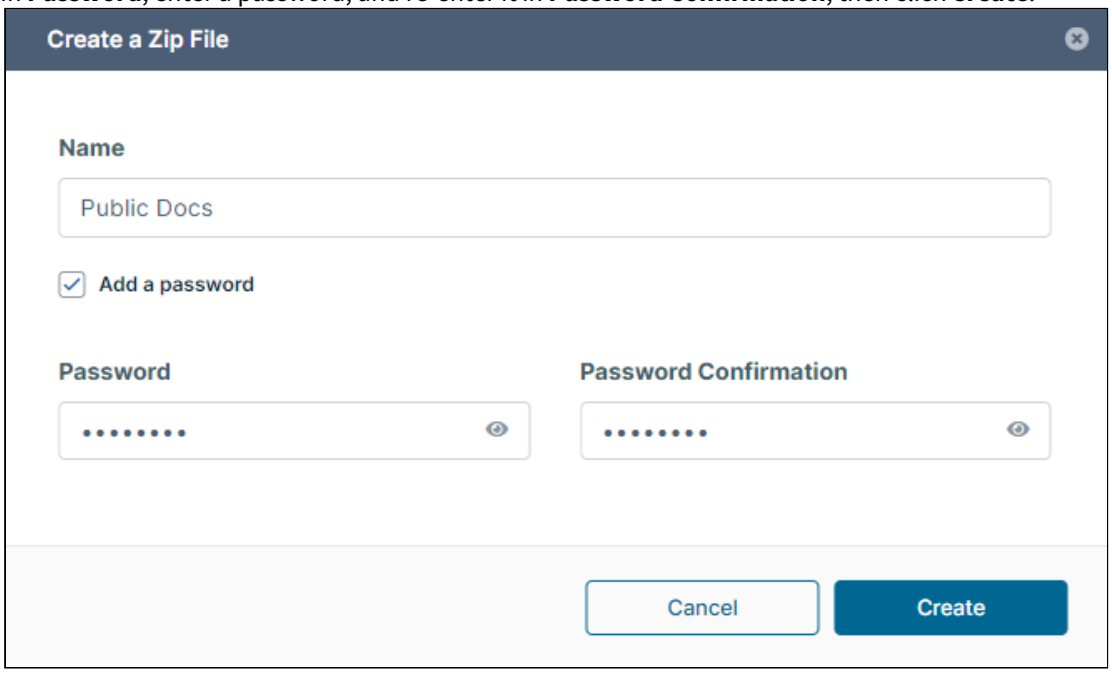
A **Create a Zip File** dialog box opens.

3. In **Name**, enter the name of the zip file.

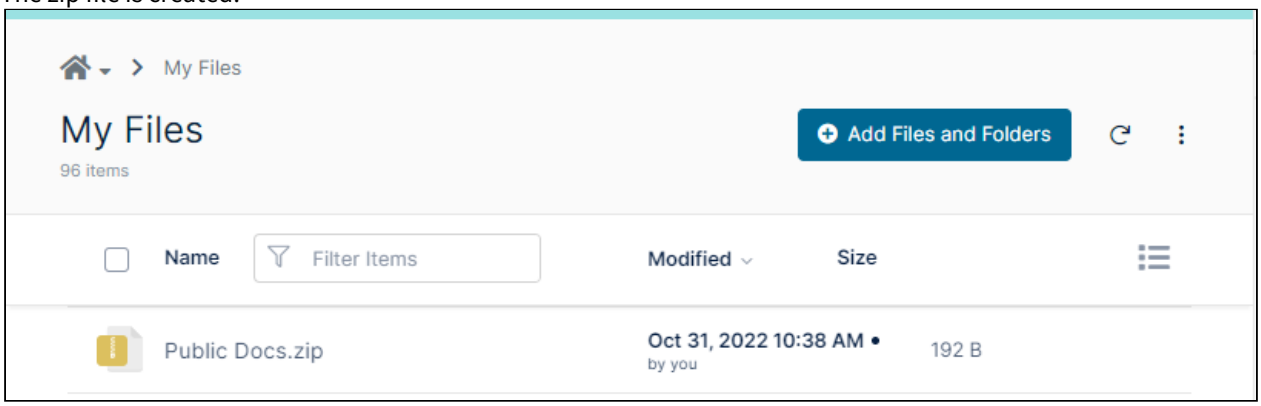


4. Check **Add a Password** to require users to enter a password before opening the zip file.

5. In **Password**, enter a password, and re-enter it in **Password Confirmation**, then click **Create**.



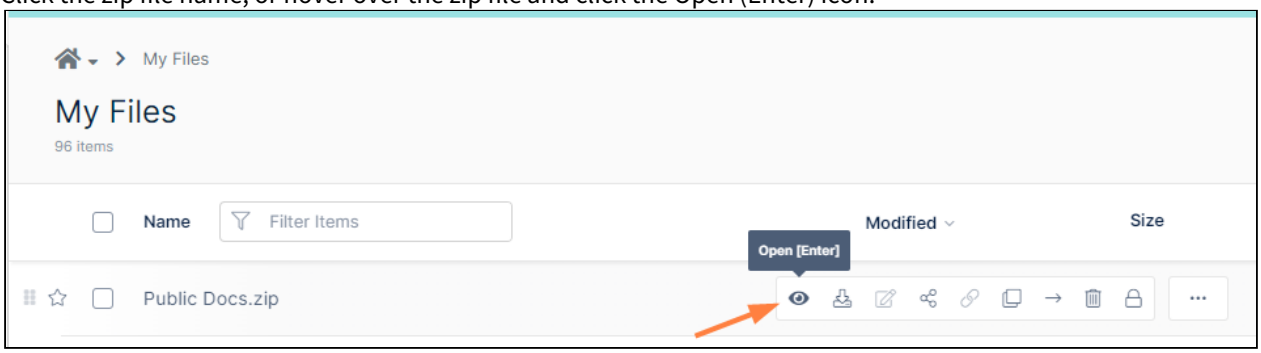
The zip file is created:



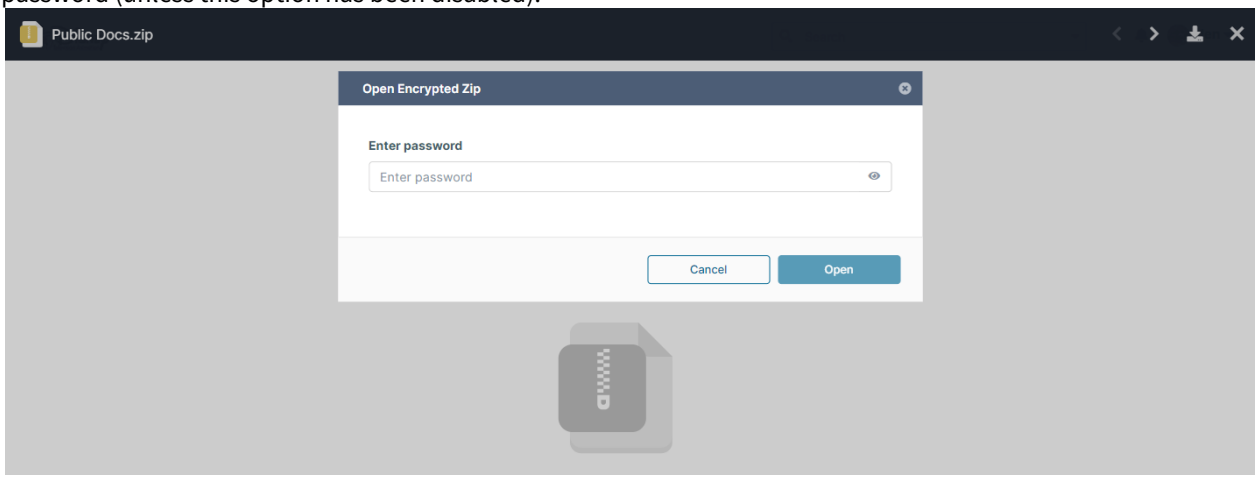
To add content to a zip file

You can add content to a zip file if you have created or uploaded it, or if it has been shared with you and you have upload permission. A zip file can only be opened in FileCloud if it is under 100 MB; therefore, you cannot add more than 100 MB of content to a zip file from within FileCloud.

1. Click the zip file name, or hover over the zip file and click the Open (Enter) icon.

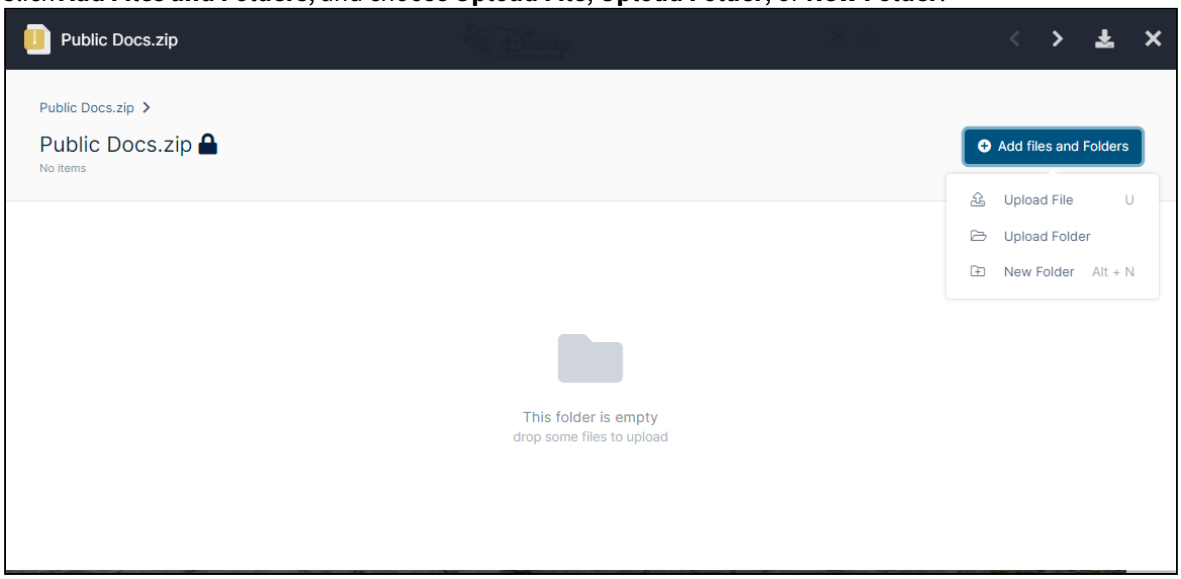


If the zip file is password-protected and you have not accessed it yet during this login session, you are prompted to enter the password. When you access it again during this session, you will not be prompted to enter your password (unless this option has been disabled).



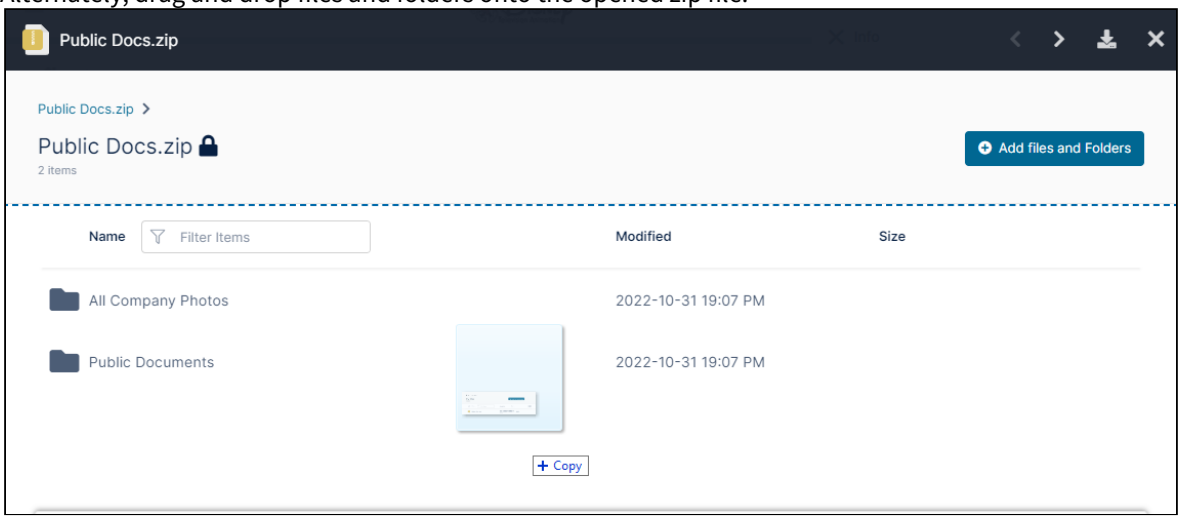
2. Enter the password and click **Open**.
   The zip file opens. The following screenshot shows an empty zip file that was just created.
3. Add files and folders to the zip file.

- Click **Add Files and Folders**, and choose **Upload File**, **Upload Folder**, or **New Folder**.



Then, upload files and folders or create new folders and add files to them.

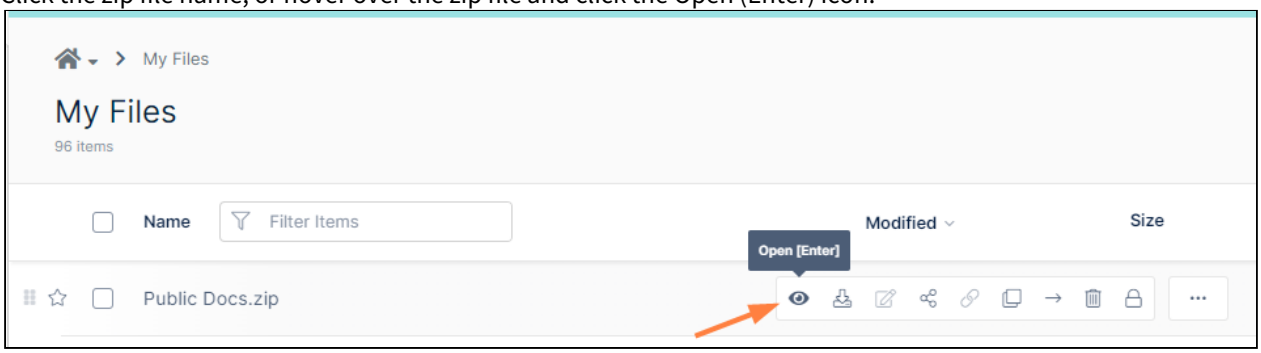
- Alternately, drag and drop files and folders onto the opened zip file:



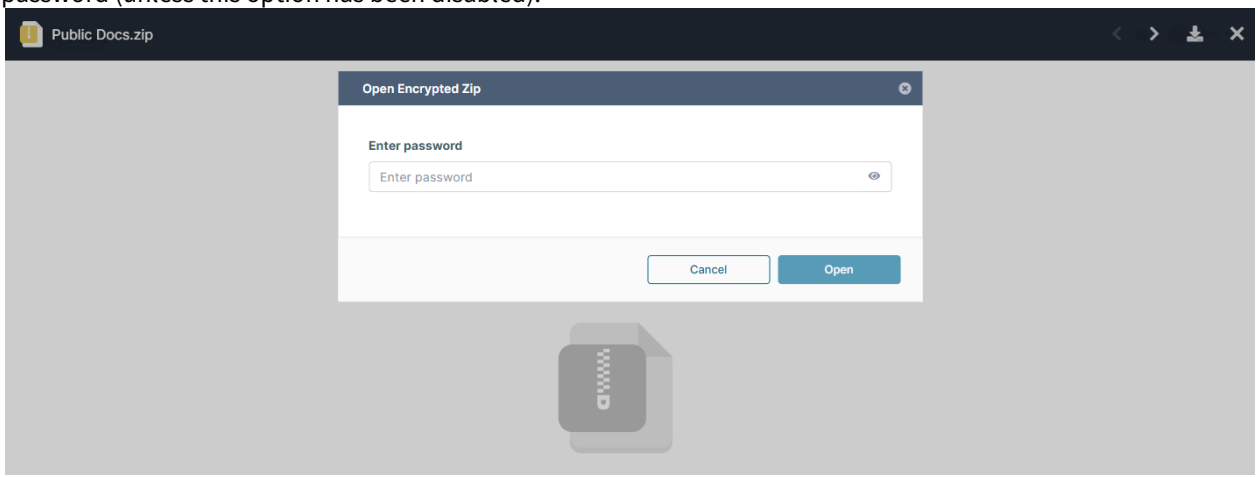
4. When you are finished, close the screen to return to your file/folder listing.
   Later you can add more contents or delete contents from the zip file.

To work with the contents of a zip file

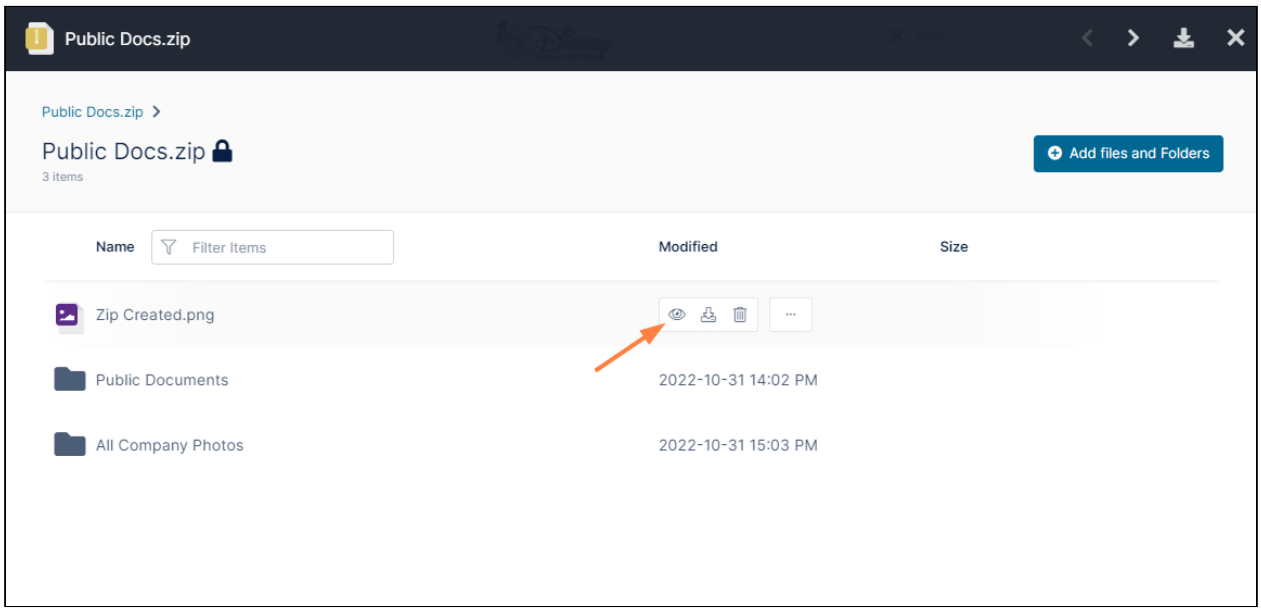
1. Click the zip file name, or hover over the zip file and click the Open (Enter) icon.



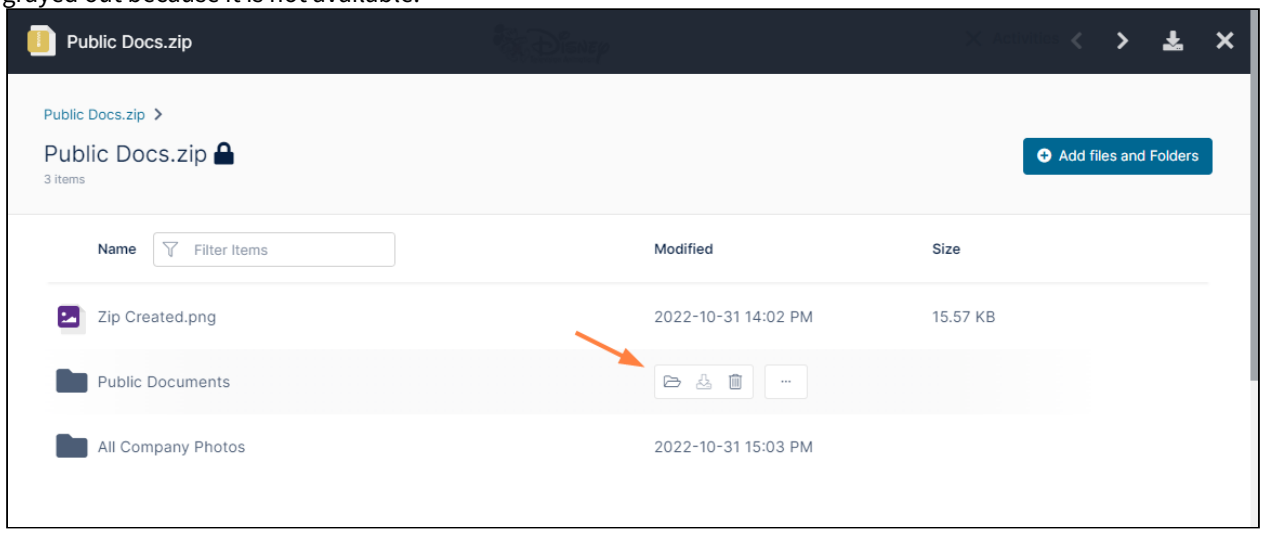
2. If the zip file is password-protected and you have not accessed it yet during this login session, you are prompted to enter the password. When you access it again during this session, you will not be prompted to enter your password (unless this option has been disabled).



3. Enter the password and click **Open**.
   The zip file opens.
4. Hover over a file or folder.
   If you hover over a file, you see icons for preview, download, and delete. If you do not have permission for an action, it is grayed out.
   Note that you can preview .jpg, .png, .pdf, .txt, .docx, .pptx, and .xlsx files from within the zip file. Other file types will prompt you to download them first.



If you hover over a folder, you see icons for open and if you have permission, delete. The download option is grayed out because it is not available.



5. Click an icon, and perform the operation.
   Note: You can only download files contained in zip files to your file system, you cannot download them to another folder within FileCloud.

Permissions in shared zip files

When a zip file is shared publicly, share users can view the contents of the zip file and download them. When a zip file is shared privately, the operations that share users can perform on its contents depends on their share permissions.

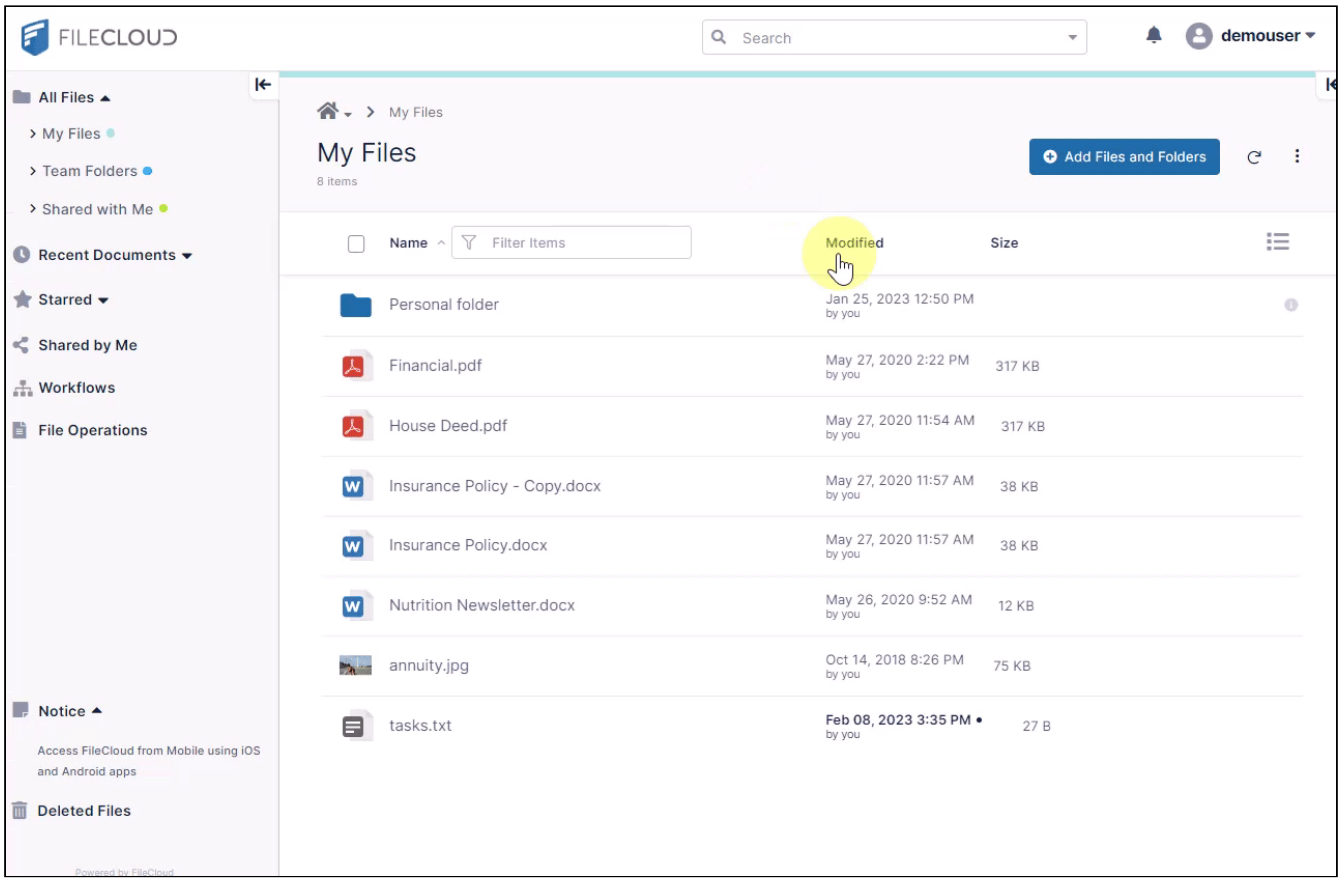
The following table shows what each share permission allows share users to do with the contents of a zip file

Permission	Description
View	Preview files and open folders in the zip file.
Download	Download files in the zip file and save them. Downloading folders in the zip file is not permitted.
Upload	Upload files into the zip file and delete files in the zip file.
Share	Share the zip file. Sharing of files and folders inside the zip file is not permitted.

Delete Items

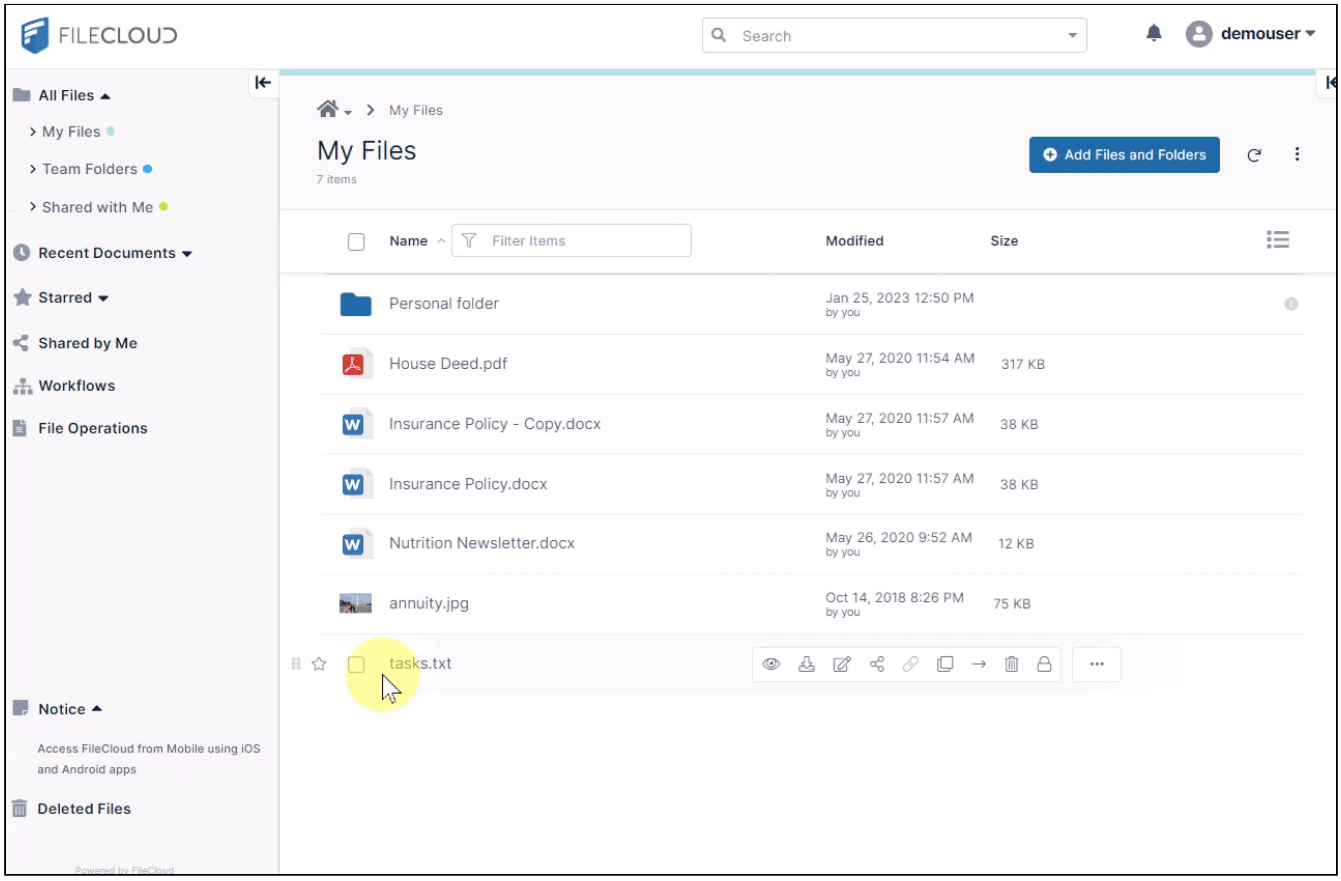
Delete a single item

To delete a single item, hover over it and click the delete icon.



Delete multiple items

To delete multiple items, check the boxes next to the items, then click the **More** icon in the upper-right corner of the screen, and choose **Delete.**



> You can also delete all items in a folder from the **Folder Properties** box. See View Folder Properties.

Perform Actions on Deleted Items

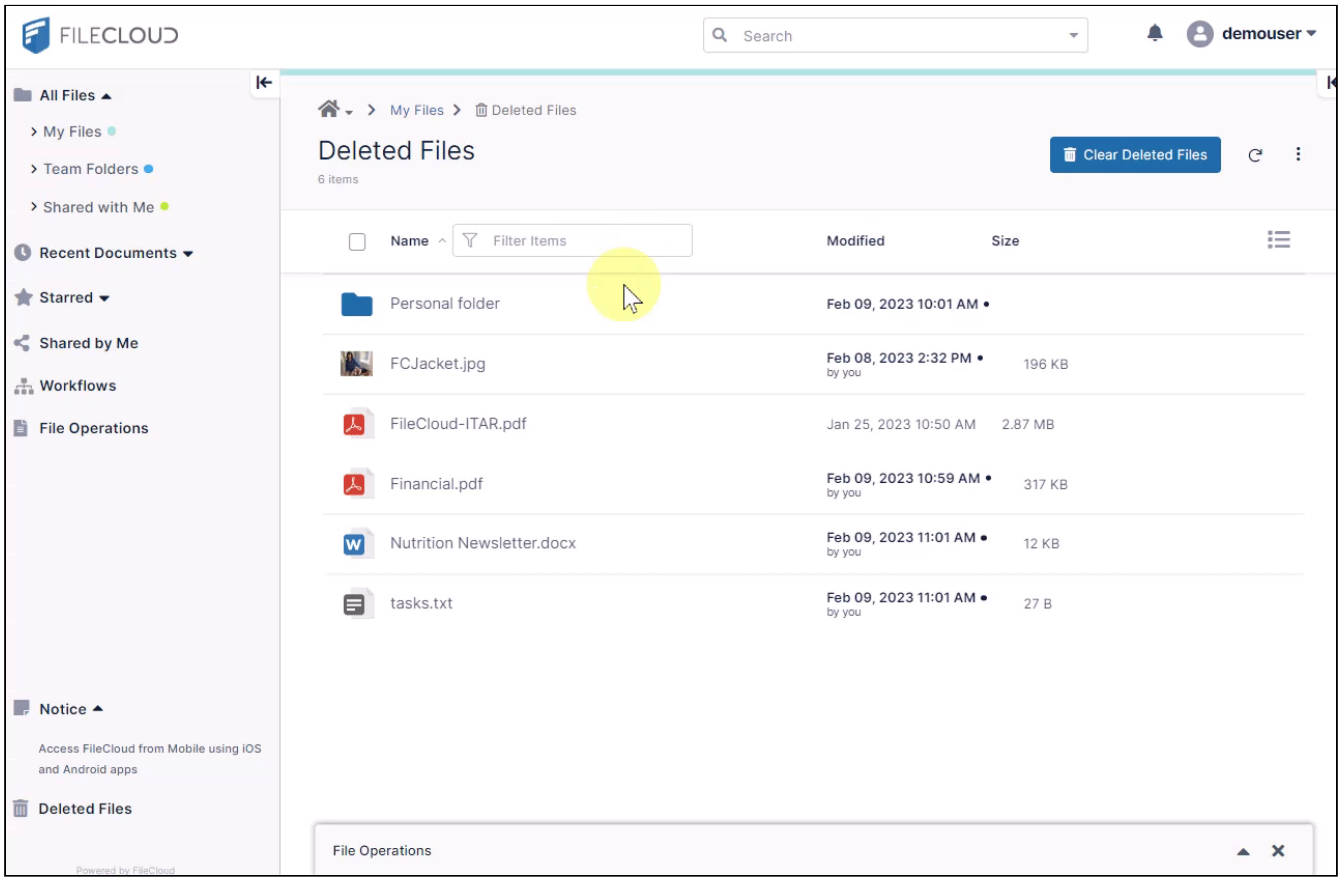
If you accidentally delete a file or folder, you can restore it from the **Deleted Files** folder. If this feature is not enabled in your system, deleted files and folders are permanently deleted and cannot be restored.

> **Deleted Files** only displays files and folders you have deleted from **My Files** .

Restore Deleted Files

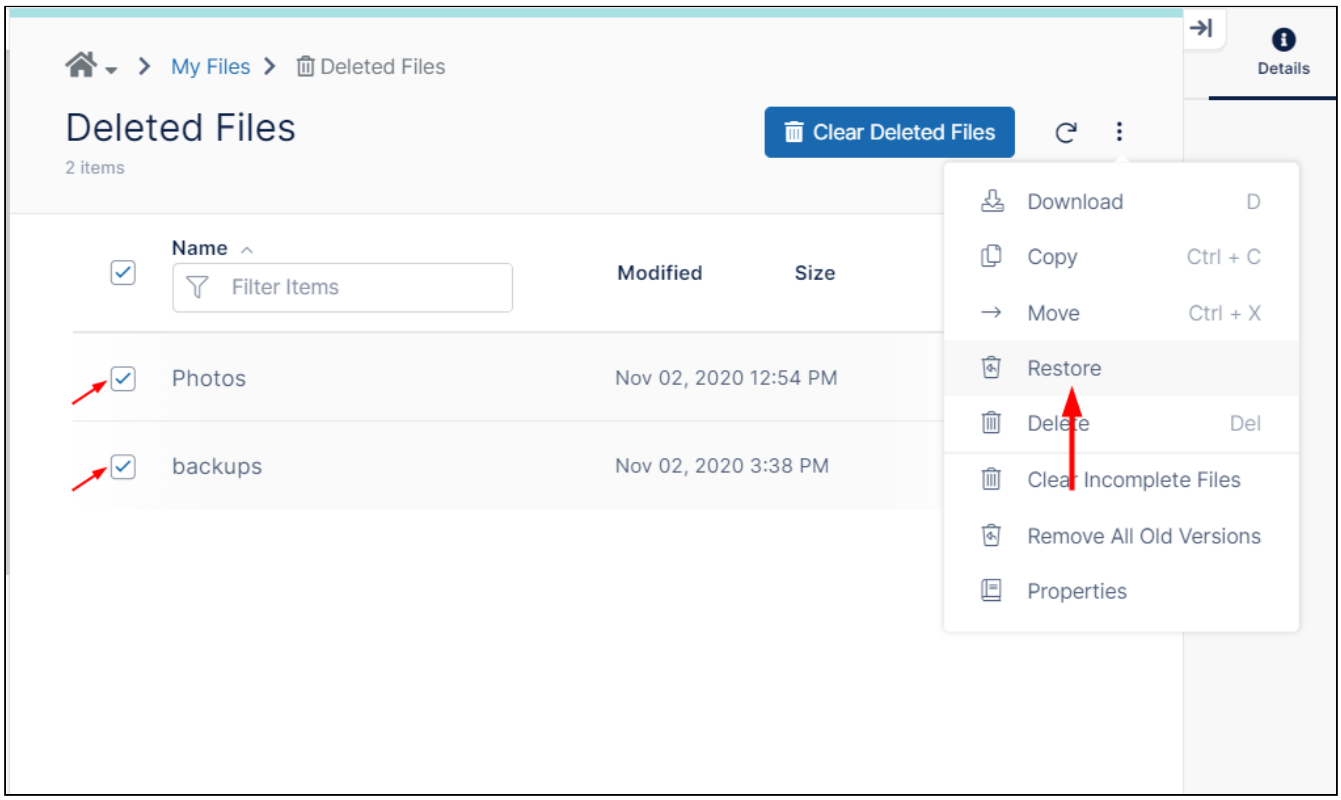
Restore a single file or folder deleted from My Files

To restore a file or folder deleted from **My Files**, in the navigation bar, click **Deleted Files**. Navigate to the file or folder, hover over its row, and click the **Restore** icon. It is restored to the folder it was deleted from.



Restore multiple files or folders

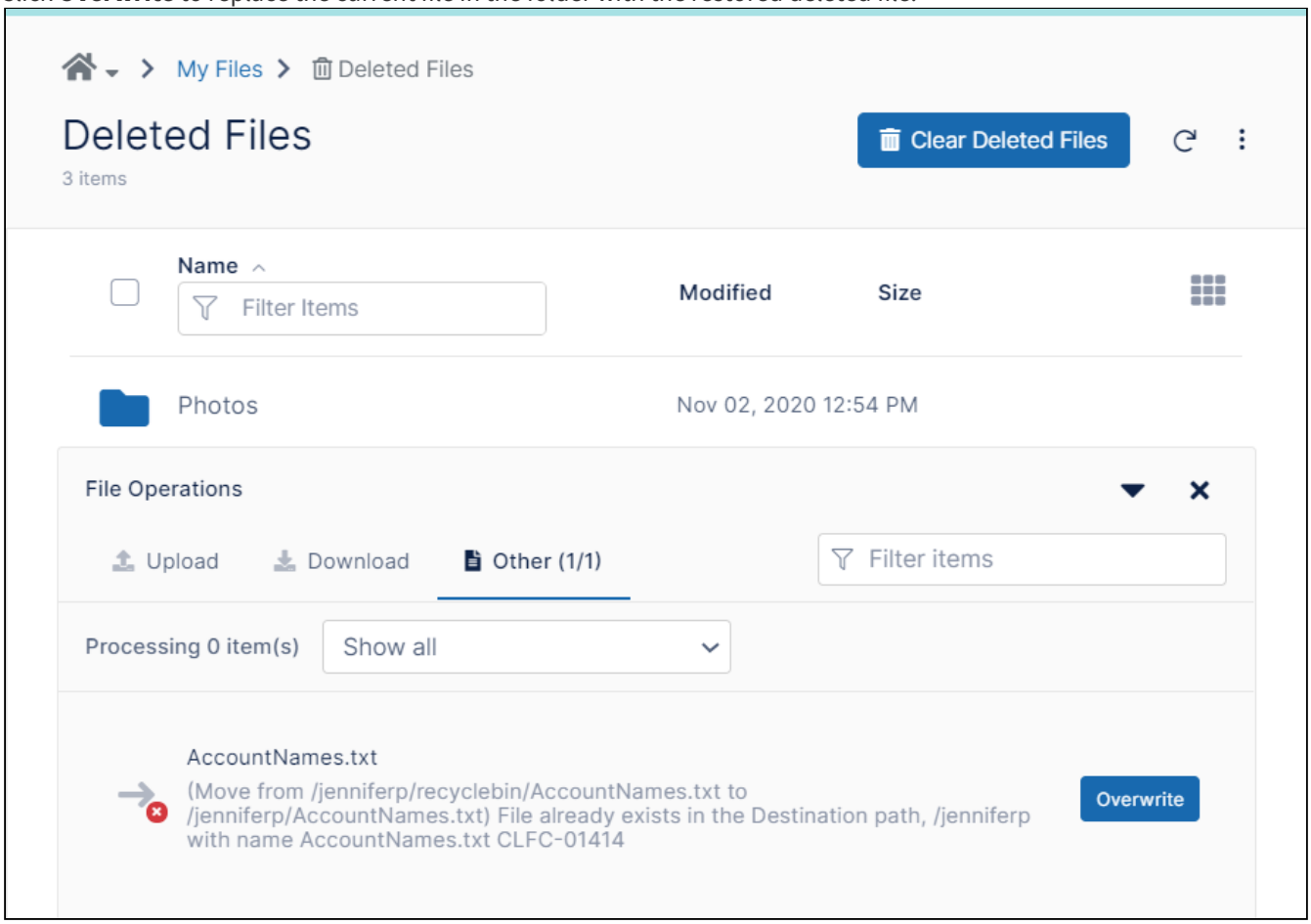
To restore multiple deleted files or folders, click **Deleted Files** in the navigation bar. Check the box of each file or folder that you want to restore. Click the **More** icon in the upper-right corner of the screen and choose **Restore**.



Restore a file when a file of the same name exists

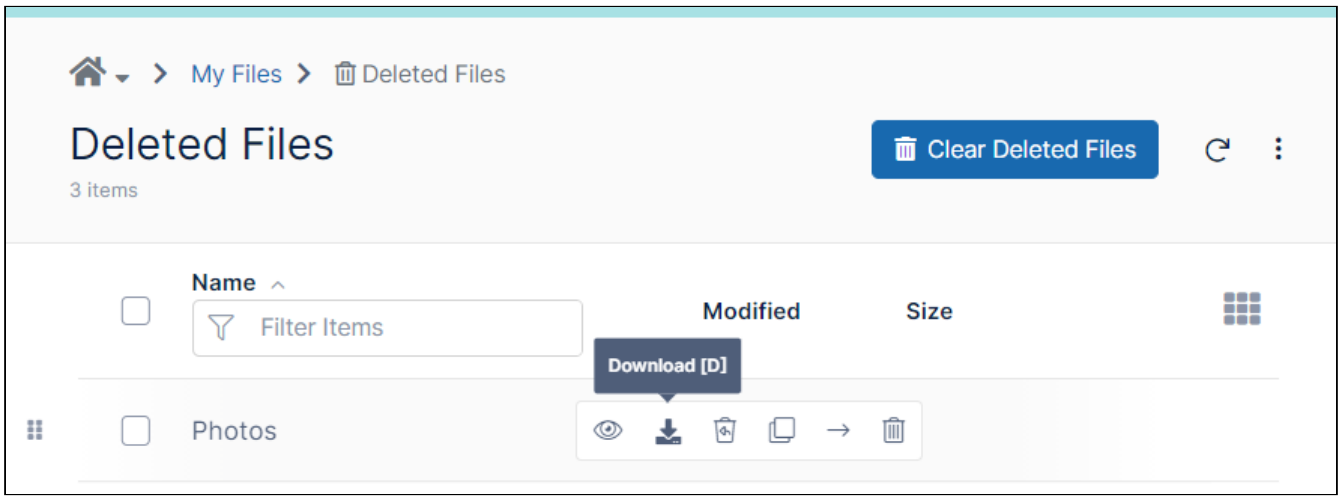
In **Deleted Files**, when you click **Restore** on a file, if there is currently a file with the same name in the folder that you are restoring to, FileCloud prompts you to confirm that it should overwrite the existing file.

Click **Overwrite** to replace the current file in the folder with the restored deleted file.



View, Move, Copy, and Download Deleted Files

You can also view, download, copy, or move files from the recycle bin. Hover over the file and select the icon for the action.

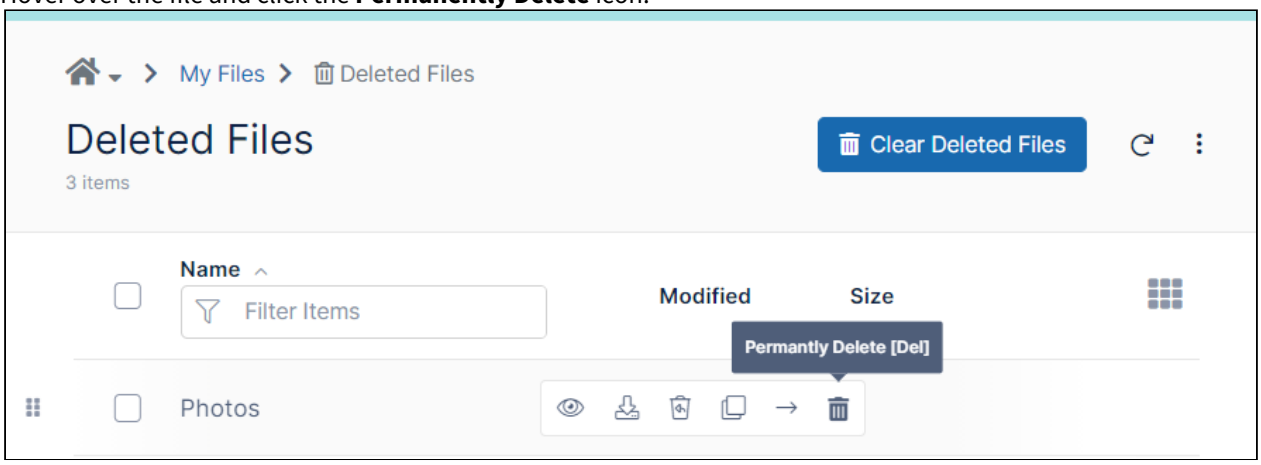


Permanently Delete Files

You can permanently delete either individual files or all deleted files from the **Deleted Files** folder.

To permanently delete an individual file from the Deleted Files folder:

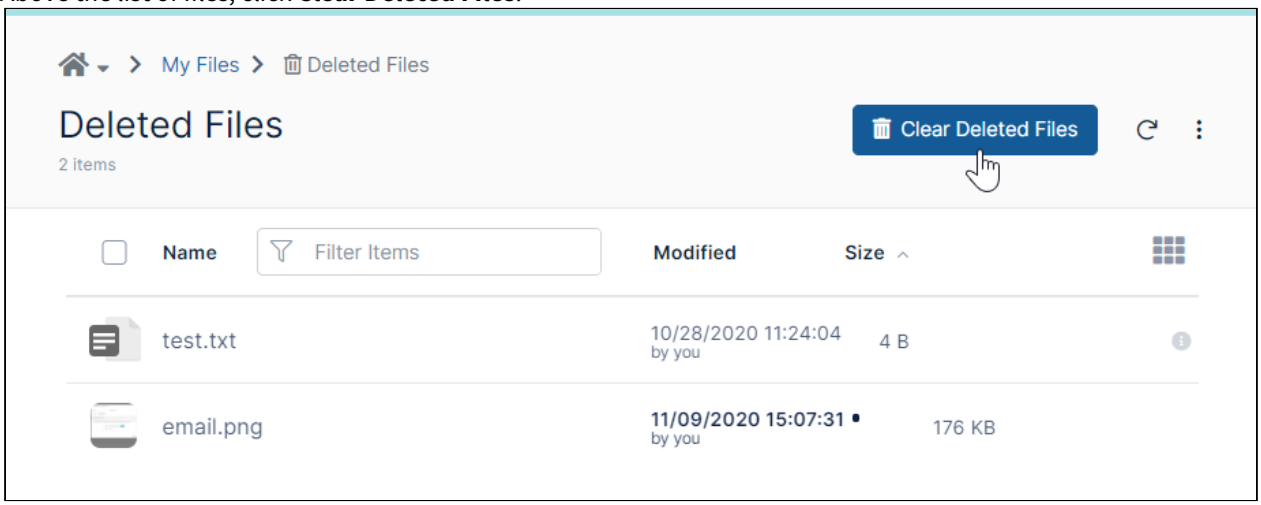
- Hover over the file and click the **Permanently Delete** icon.



To permanently delete all My Files from the Deleted Files folder:

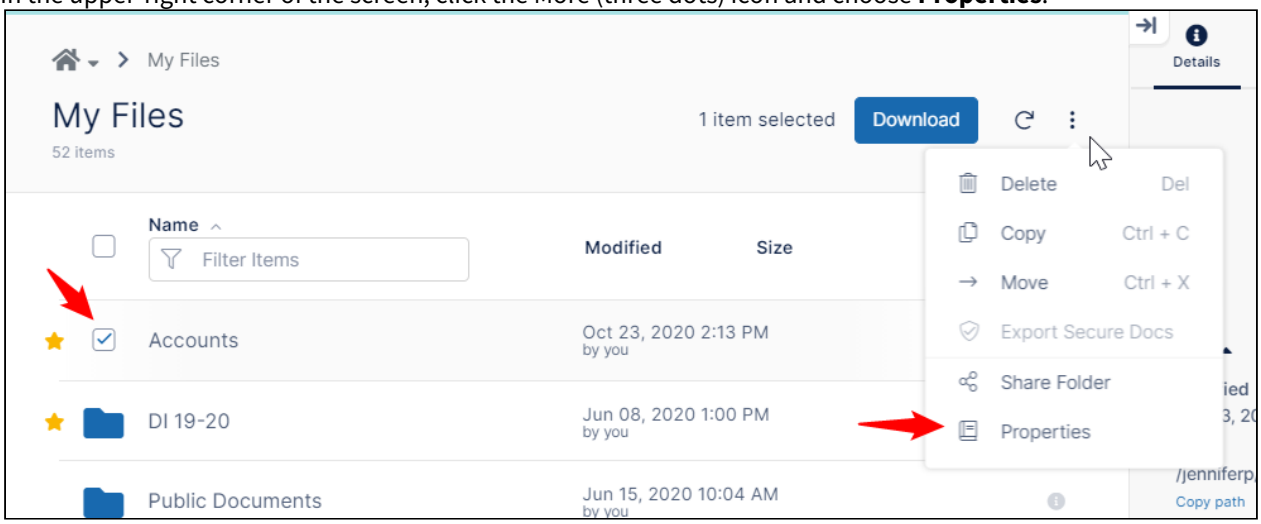
1. Open the **Deleted Files** folder**.**

2. Above the list of files, click **Clear Deleted Files**.



To permanently delete files from a folder from the folder's properties:

1. Navigate to the folder
2. Check the folder.
3. In the upper-right corner of the screen, click the More (three dots) icon and choose **Properties**.



The **User Home Properties** dialog box opens:

4. Click **x** in the row for **Deleted Files** to permanently delete the files deleted from the folder.

You can also perform the following operations in the **Deleted Files** folder**.**

- Remove All Old File Versions
- Clear Incomplete Files

Advanced File and Folder Operations

- Set Permissions on Folders in the User Dashboard
- Viewing Files by List or Grid
- Playing Audio
- View Previous Versions Of Files
- File Locking
- File and Folder Comments
- Freeing up space
- Creating a Direct Link
- Adding Metadata
- DRM for exporting secure documents
- Work with Email Files
- User Groups
- File Approval

Set Permissions on Folders in the User Dashboard

- Your admin must give you the ability to set folder-level permissions. (If you are an admin, see Enable Folder-Level Permissions.)
- Folder-level permissions can be used to set more detailed permissions on folder shares.
- They can only be set on the folders in **My Files** (your private store) .
- They are useful if you share a folder with a group and then but want to add more restrictions for specific users.
- If you have the ability to set folder permissions, when you select a folder and click the **Security** tab in the right panel, a **Manage Security** button appears at the bottom.

Example 1:

An example of share permissions versus folder-level permissions:
You share a folder of account records with a group that contains two account managers and an account holder. You give the group all permissions in the share.

- You want the account managers to be able to make any changes to the folder, but you only want the account holder to be able to read and download its contents, so you add folder-level permissions and only give the account holder read and download permissions.
- The managers can continue to perform all actions on the contents of the folder.

Example 2:

An example of share permissions combined with folder-level permissions that would not work:
You share the same folder of account records from Example 1 with the same group that contains two account managers and an account holder. You give the group read and download permissions in the share.

- You want the account managers to be able to make any changes to the folder, so, mistakenly, you add folder-level permissions give the account managers all permissions.
- The managers can still only perform read and download actions on the contents of the folders.
  The most restrictive permissions from the share permissions and the folder-level permissions take precedence.

What Are Inherited Permissions?

When a folder contains more folders inside it, the top folder is the parent and the sub-folders are children.

When you are applying folder-level permissions, if you check the **Inherit Folder-Level Security** option, a parent's permissions are applied to its sub-folders.

In general, a sub-folder can be in one of the following states:

- The child, or sub-folder has all of the same permissions as its parent folder, plus additional permissions
- The child, or sub-folder has all of the same permissions as its parent, and no additional permissions
- The child, or sub-folder's permissions are not connected in any way to the parent folder and the sub-folder retains a separate set of permissions

When setting folder-level permissions in FileCloud, you have the following options:

Option	Description
Inherit Permissions	Permissions set in this folder are exactly the same as the top level folder's permissions

Option	Description
Don't Inherit Permissions	Permissions set in this folder don't inherit from any top level folder's permissions and are specific to only this folder

Security Permission Options

When you set folder-level permissions, you can select one or more of the following options:

Read	Write	Delete	Share	Manage
• Allows downloading • Allows previewing	• Allows uploading and modifying • Allows creating files and folders • Allows renaming	Allows deleting	Allows sharing	Allows managing folder-level permissions

Permission Dependencies

If a permission can only be enabled if a second permission is enabled also, when you check the first permission, the second is automatically enabled.
Likewise, when you disable the second permission, the first is also disabled.

For example, **write** permission can only be enabled if **read** permission is enabled also, so if you enable **write** permission, **read** permission is automatically enabled. But if you disable **read** permission, **write** permission is also disabled.

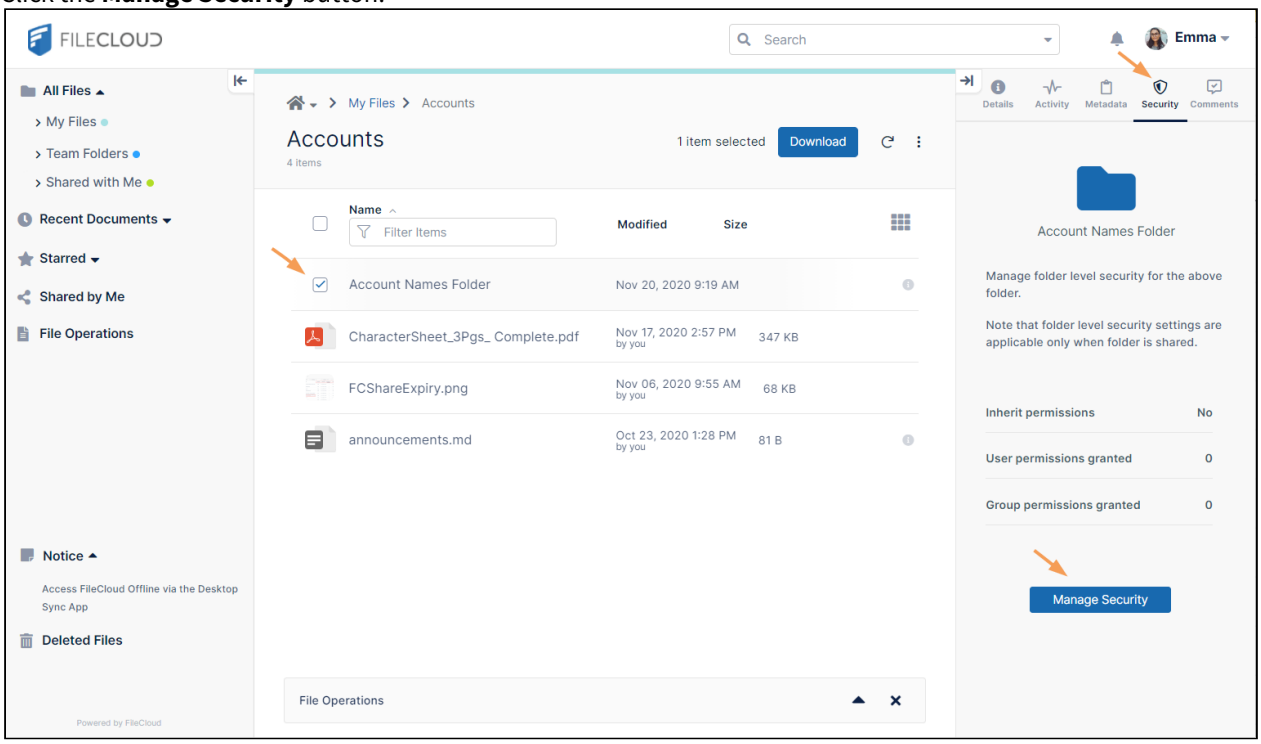
The following table shows which permissions require others to be enabled.

Permission	Other permissions that must be enabled
Read	none
Write	Read
Share	Read, Write, Delete
Delete	none
Manage	Read, Write, Share, Delete

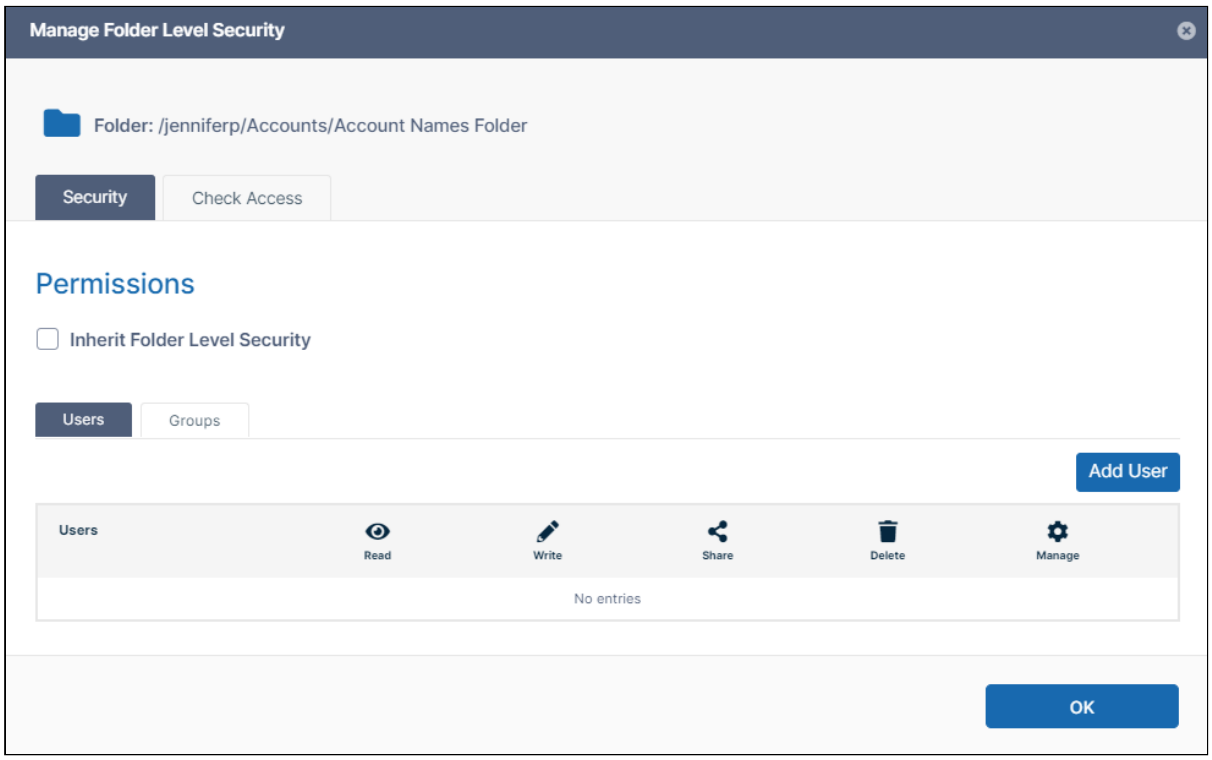
How do I secure access to my folders?

To set folder-level permissions:

1. In the User Portal, in **My Files**, check any folder or sub-folder.
2. In the right panel, click the **Security** tab.
3. Click the **Manage Security** button.

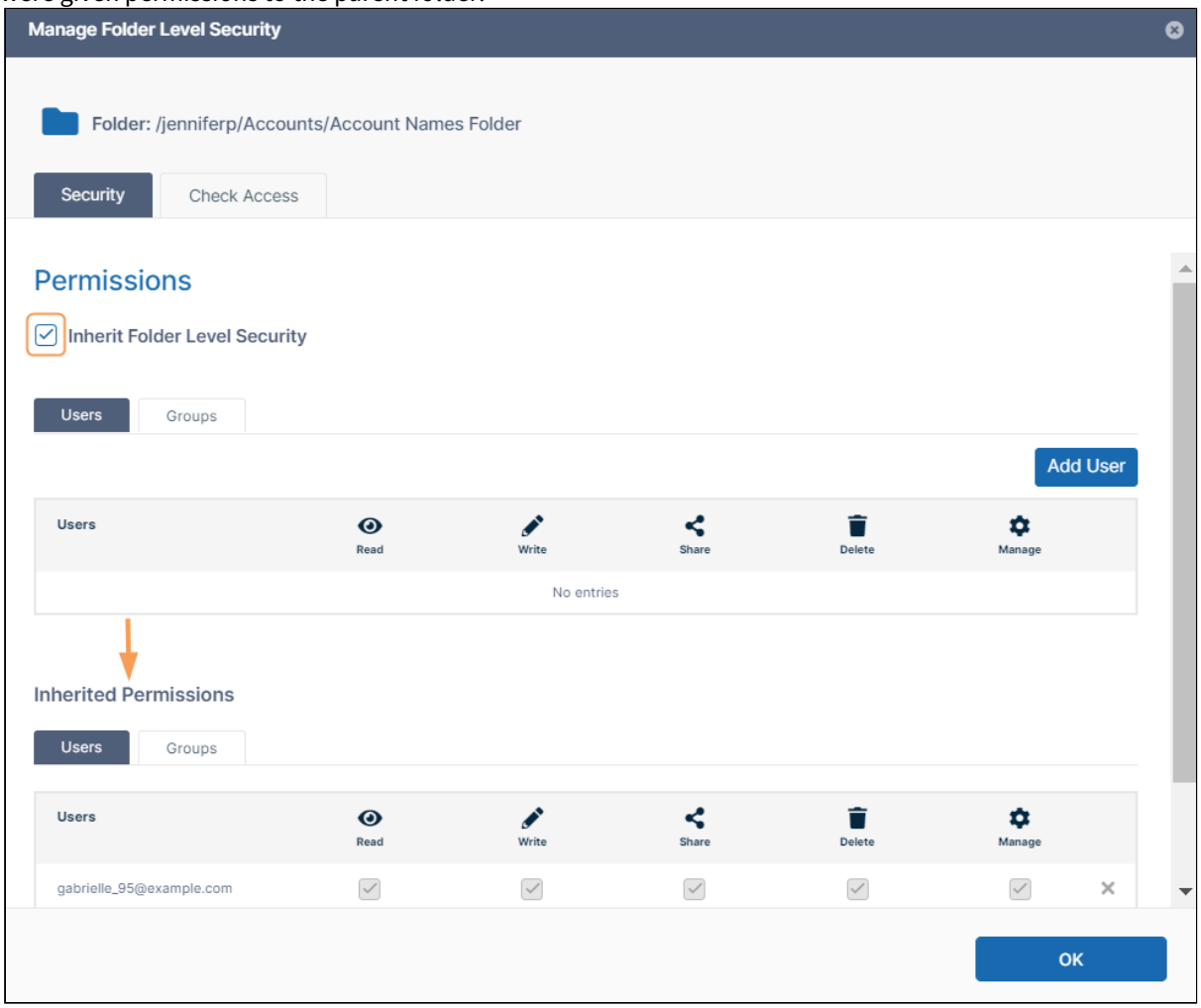


The **Manage Folder Level Security** dialog box opens.



4. To inherit folder permissions from its parent folder, check **Inherit Folder Level Security**.
   An **Inherited Permissions** section appears and displays the inherited permissions for users and groups that

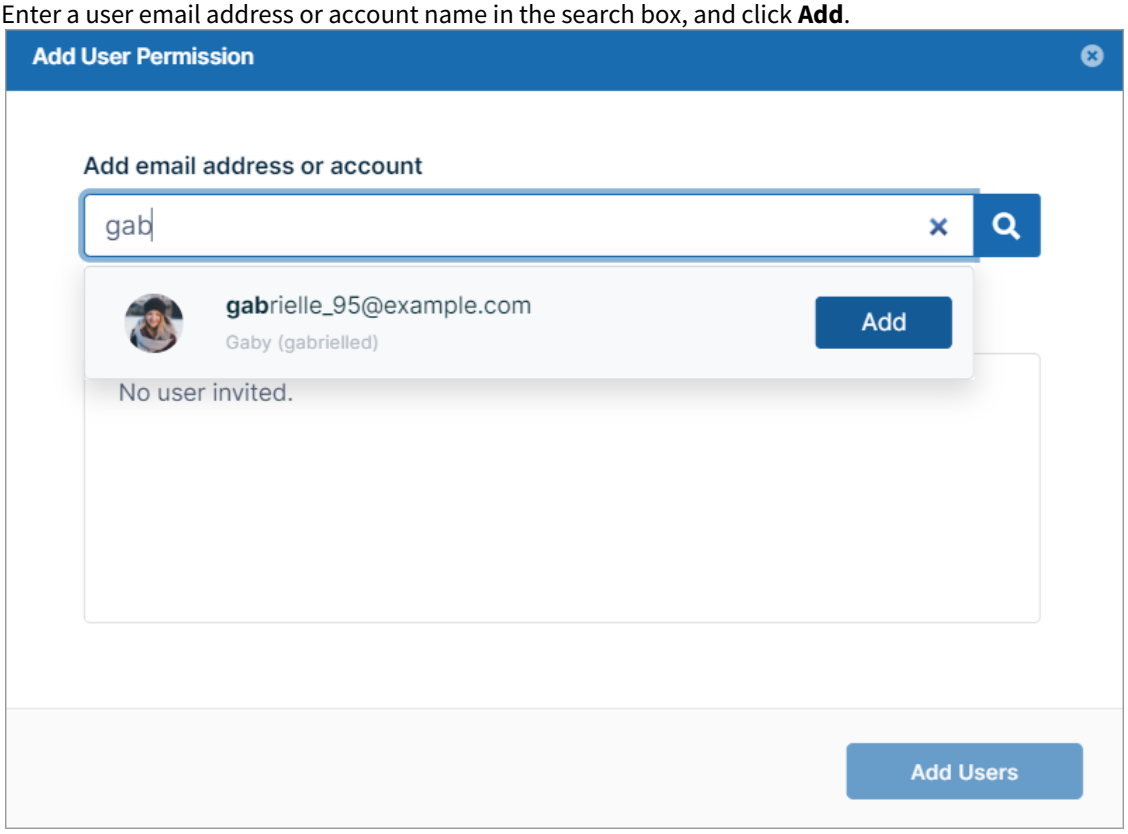
were given permissions to the parent folder.



> You can override inherited permissions by re-adding the user or group for the sub-folder and assigning new permissions. For example, in the image in Step 10, the full parent-folder access given to the user gabrielle_95@example.com is inherited, but then overridden and limited to read and write for the **Account Names Folder** sub-folder.

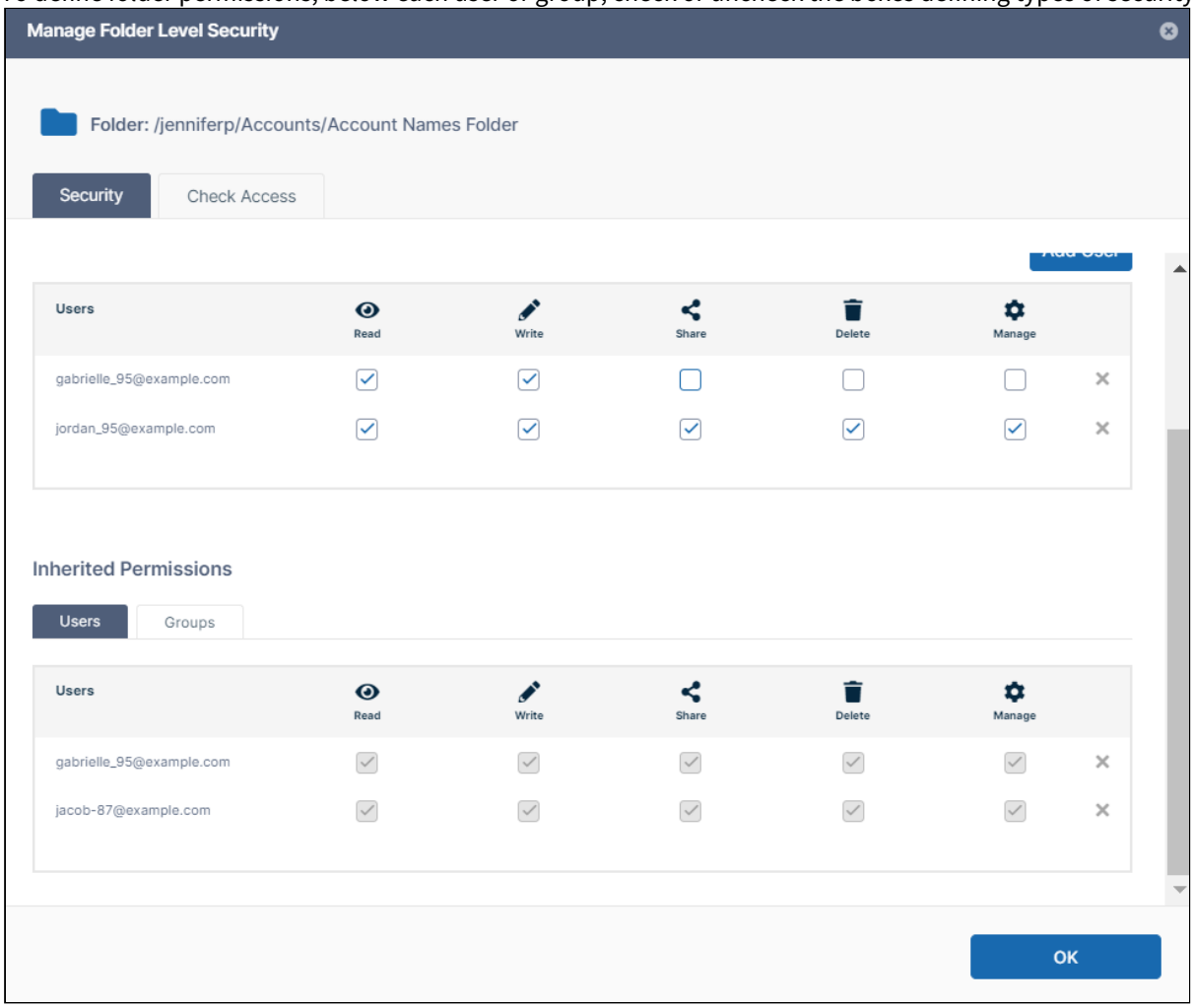
5. To give a user permissions for the folder, leave the **Users** tab selected, and click **Add User**.
The **Add User Permission** dialog box opens.

6. Enter a user email address or account name in the search box, and click **Add**.

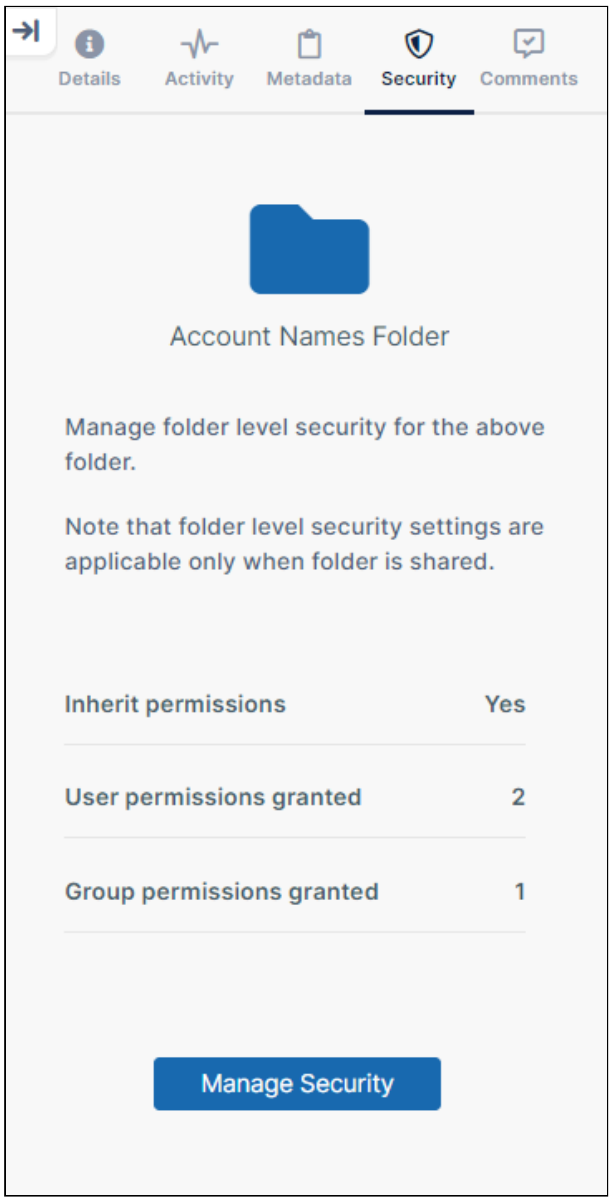


7. To give a group permissions for the folder, click the **Groups** tab, and click **Add Group**. The **Add Group** dialog box opens.
8. Click a group, and click **Add**.
9. Add any number of users and groups.

10. To define folder permissions, below each user or group, check or uncheck the boxes defining types of security.



11. Click **OK**.
The Security tab in the right panel keeps a tally of the number of users and groups you have given custom permissions to and whether or not permissions are inherited:



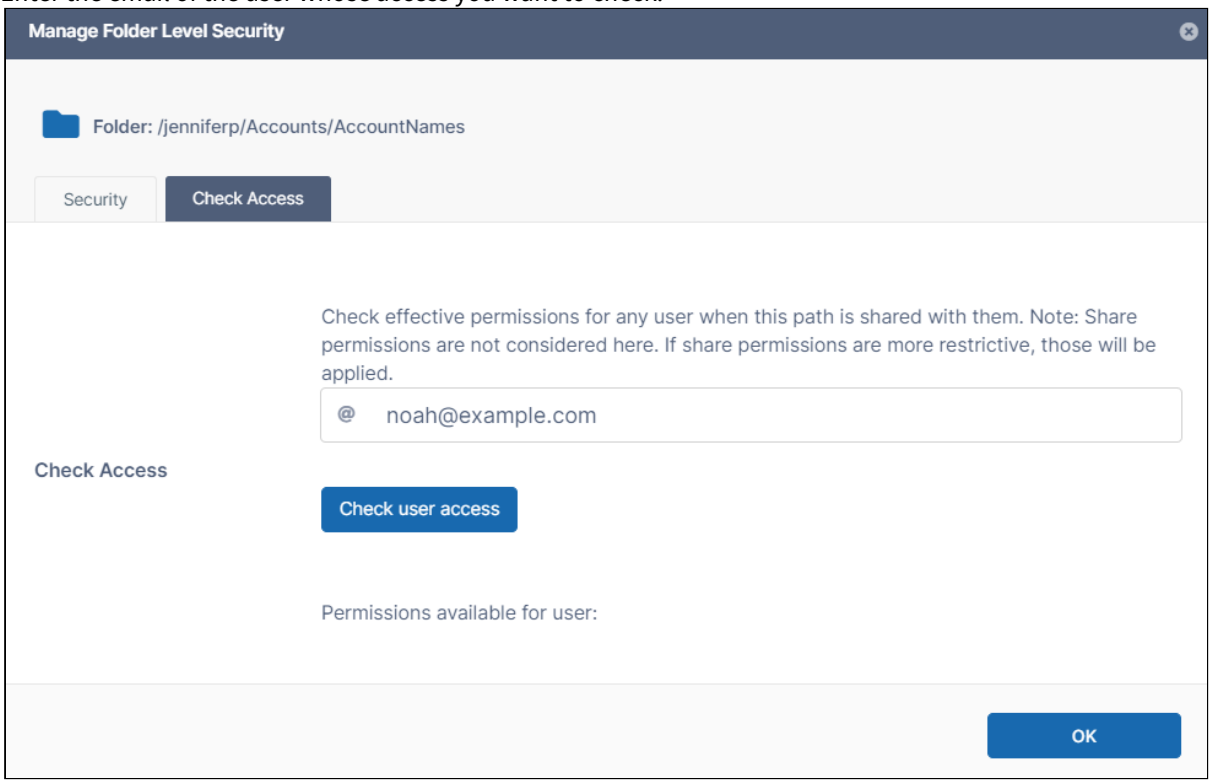
Check Existing Folder Level Permissions

It is possible to check the custom permissions a user already has for a folder before you add additional custom permissions to the user for the folder. Share permissions the user is given to the folder are not considered in this calculation. Custom permissions for a group the user is a member of and individual custom permissions for the user are considered. In this case the individual custom permissions override the group custom permissions, so if a user's group can, for example, perform all actions on the folder contents, but the individual user can only read the contents, than effective permissions indicate that the user can only read the contents.

To check existing folder permissions:

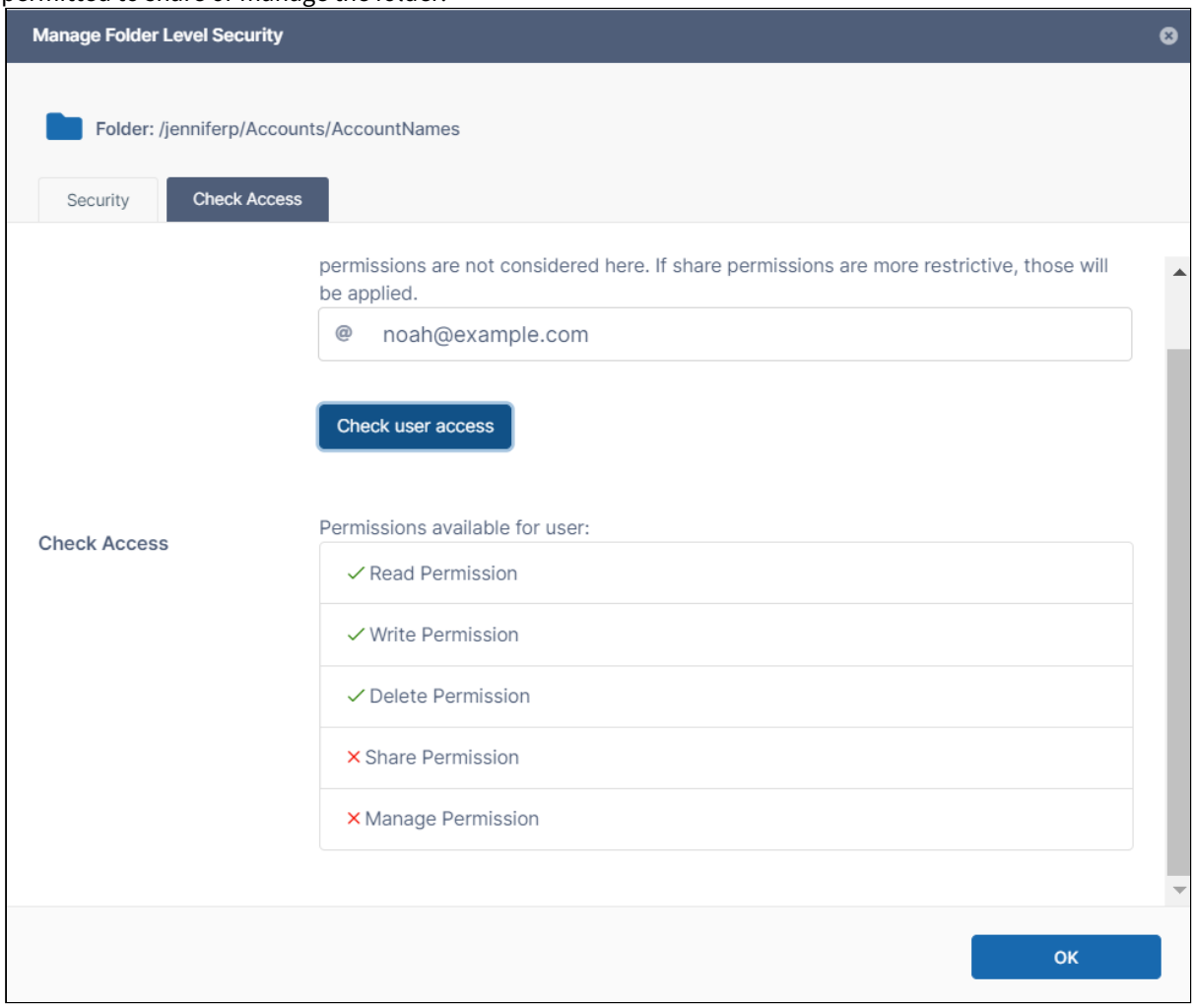
1. Select the folder and click the **Security** tab in the right-panel, then click the **Manage Security** button. The **Manage Folder Level Security** dialog box opens with the **Security** tab selected.
2. Click the **Check Access** tab.

3. Enter the email of the user whose access you want to check.



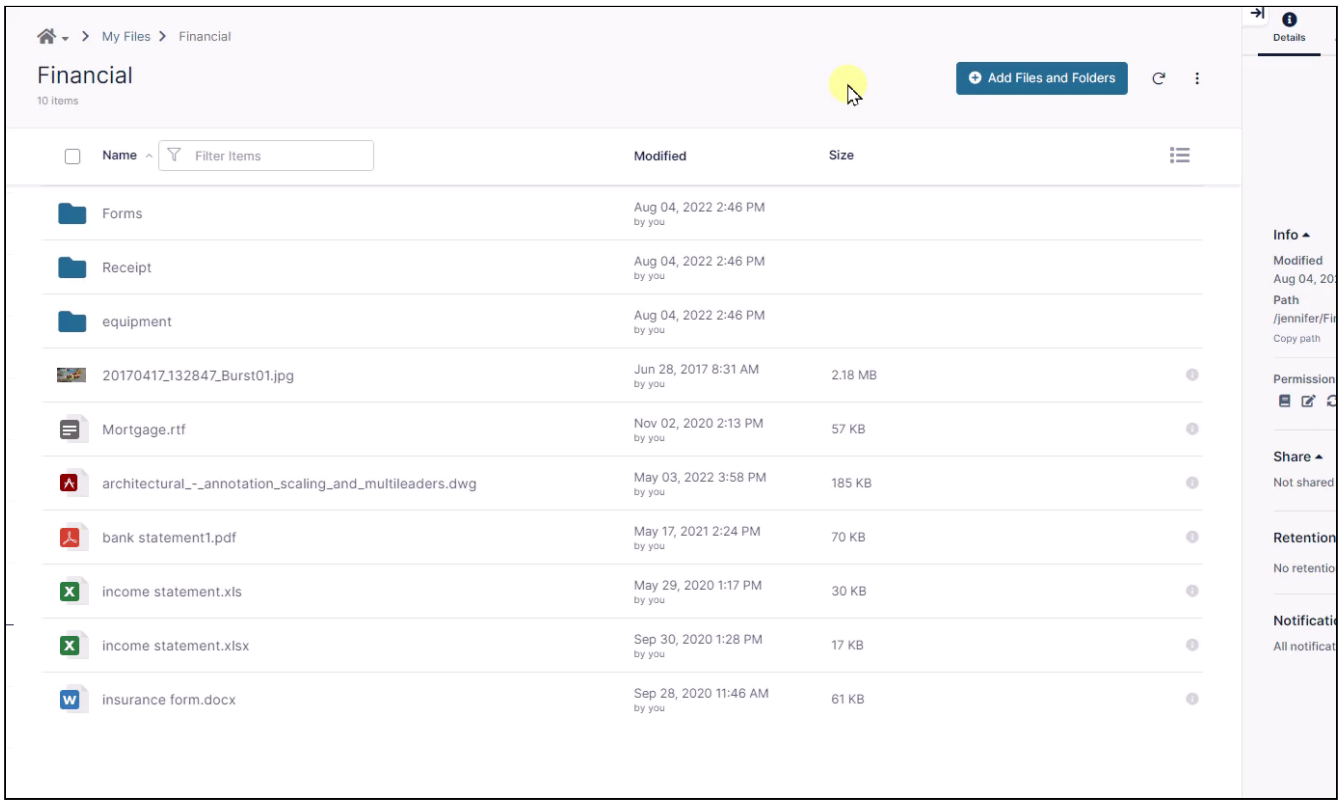
4. Click **Check user access**.
   The dialog box lists the user's permissions. In the example below, the user belongs to a group that is not

permitted to share or manage the folder.



Viewing Files by List or Grid

You can switch between list, small grid, medium grid, and large grid views by clicking on the List/Grid icon in the upper-right corner of the list.



View Previous Versions Of Files

Introduction

FileCloud can automatically maintain multiple versions of a file. The number of versions stored is configurable by the system administrator. By default up to 4 versions, including the current version, are kept.

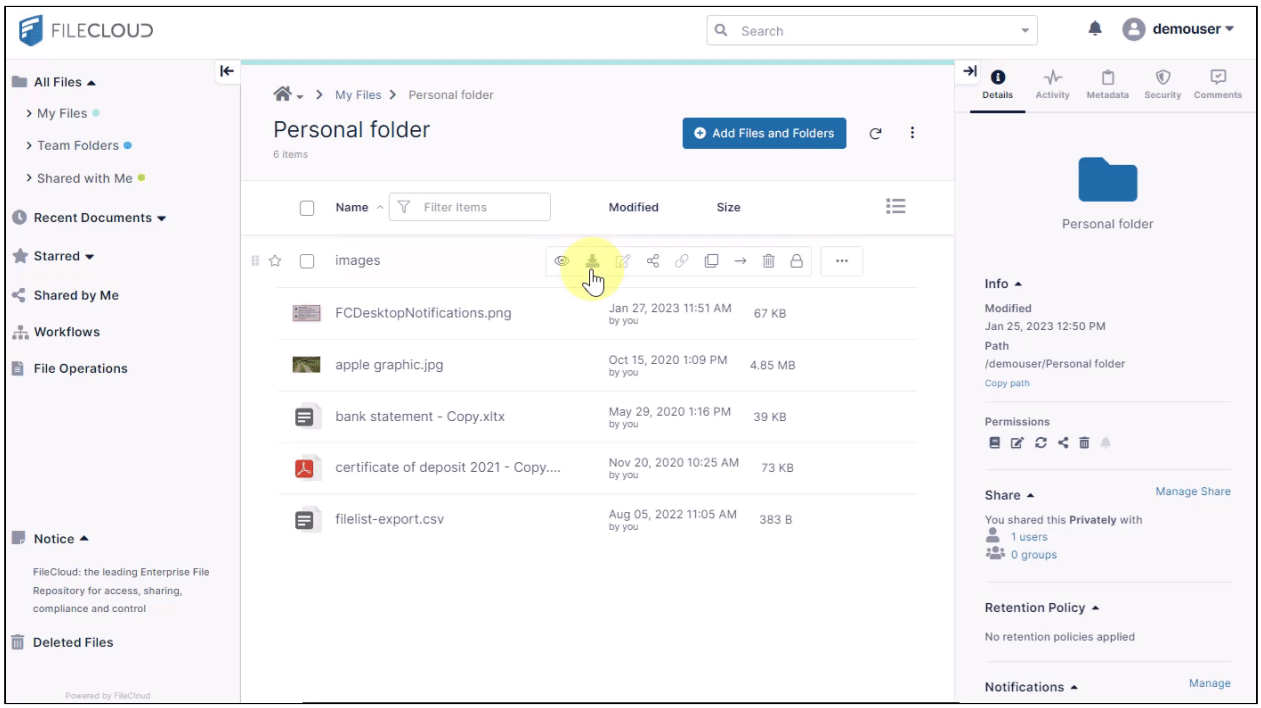
If any older version of a file is available, it can be accessed using the context menu. When sharing a folder or file, if the share has write permission set, then the previous versions of files are also available.

> ⚠ Beginning in FileCloud Version 21.3, file metadata is versioned along with the file, so that when you restore a previous version, you restore the metadata associated with that previous version. In files versioned prior to 21.3, only the most recent metadata was maintained, so that if you restore a previous version, the metadata shows the values entered most recently.

Access Previous Versions

To access the previous versions of a file:

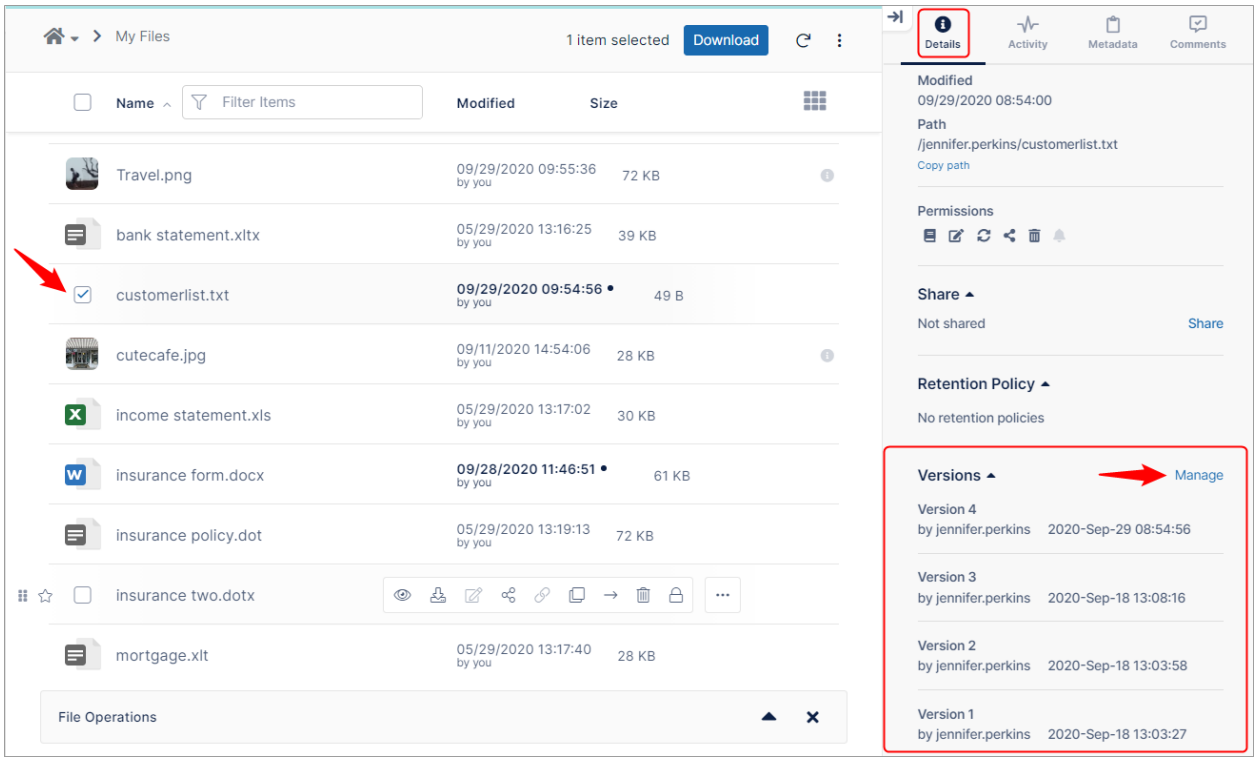
1. In the user portal, navigate to the file.
2. Hover over the file and click the **More** (three dot) icon, and choose **Previous Versions**.
   A **Previous Version** dialog box opens. It lists previous versions that you can download, delete, or promote as the current version.



Beginning with FileCloud version 20.2, you can access previous versions of a file from the Details tab.

To access the previous version of a file from the Details tab:

1. Select the file.
2. In the right panel, click the **Details** tab.
3. At the bottom of the **Details** tab, expand **Versions**.
   All versions of the file are listed.



4. Click **Manage** to open the **Previous Versions** dialog box.

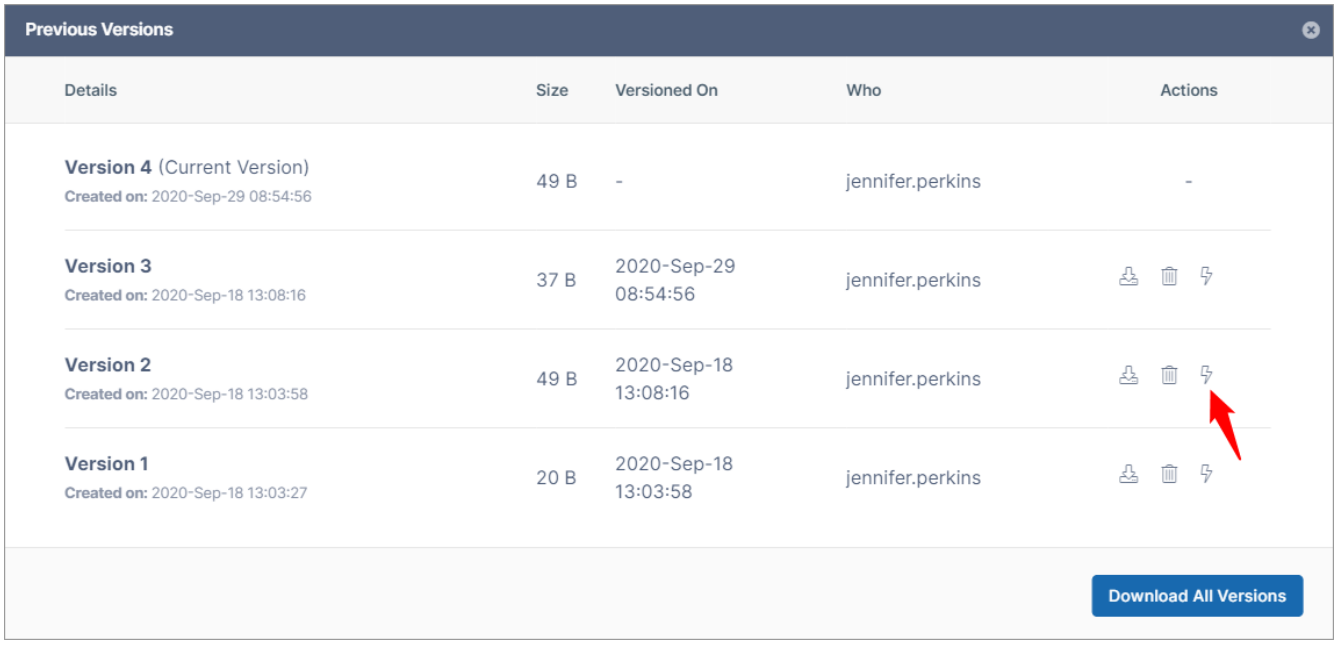
Download Previous Versions

> Beginning in FileCloud version 20.2, you are able to download all versions of a file at the same time.

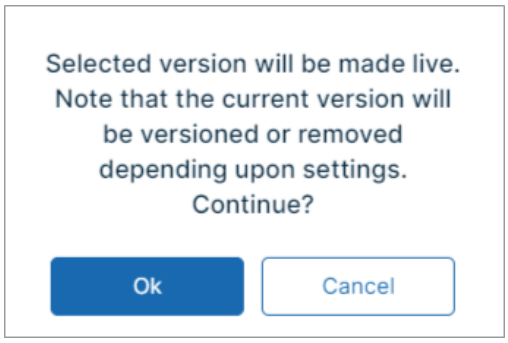
In the **Previous Versions** dialog box, click the **Download** icon to the right of a version to download it, or click the **Download All Versions** button to download all versions listed.

Make Previous Version Live

In the **Previous Versions** dialog box, click the **Make live** (lightning) icon next to a version to make it the live version.



Beginning with FileCloud version 20.2, the following confirmation box appears:



Beginning with version 20.2, the current version becomes the version prior to the current one.

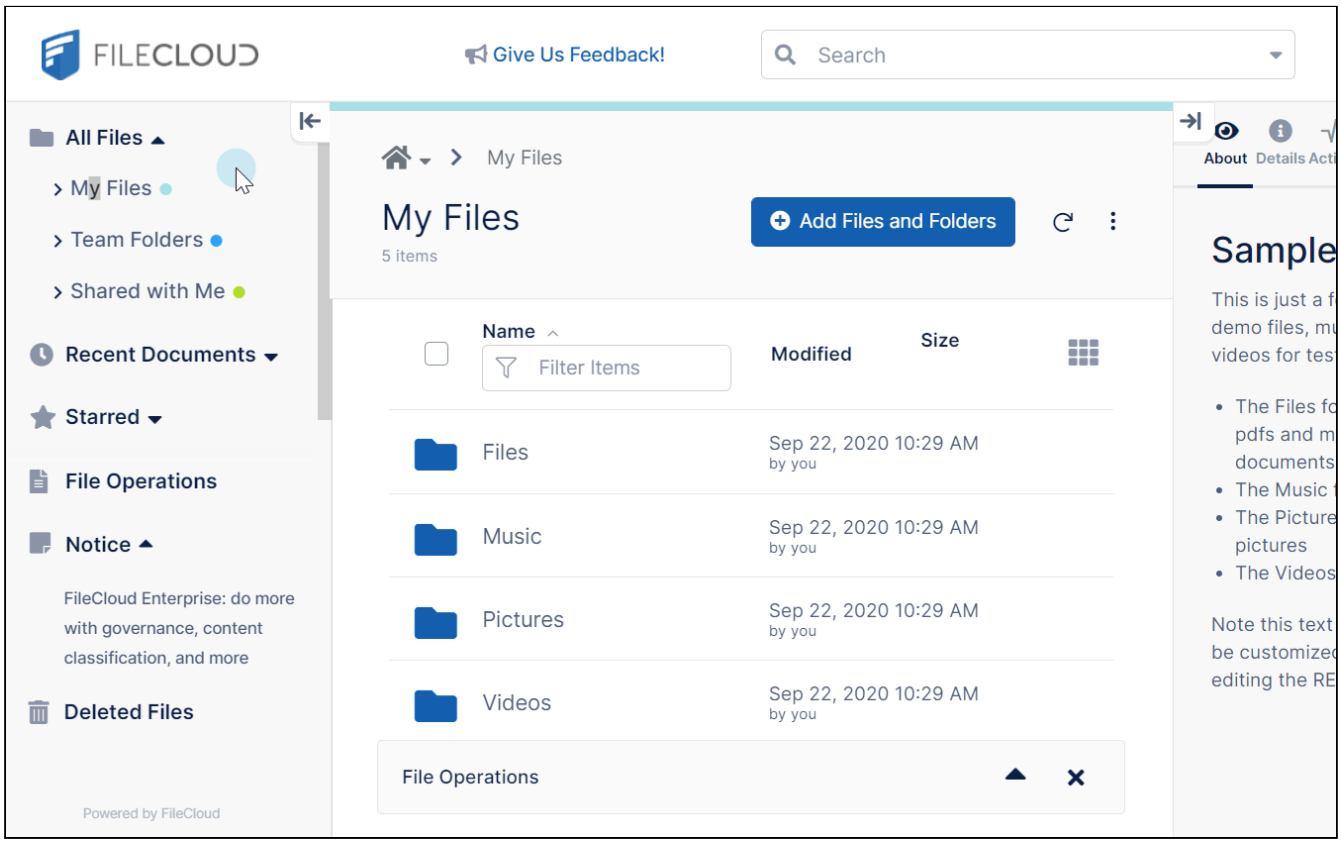
> In versions of FileCloud prior to 20.2, current versions are always removed when another version is restored. Beginning with Version 20.2, by default, the current version is saved when another version is restored.

Delete Previous Versions

In the **Previous Versions** dialog box, click the **Delete** icon to the right of a version to delete it.

Delete all Previous Versions in all Files

You can delete all previous versions of all files by opening the **Deleted Files** folder and selecting the option to remove all old versions (only applicable for My Files).



Note for admins: To view and restore previous versions of files in Team Folders, see View and Restore Previous Versions in Team Folders.

File Locking

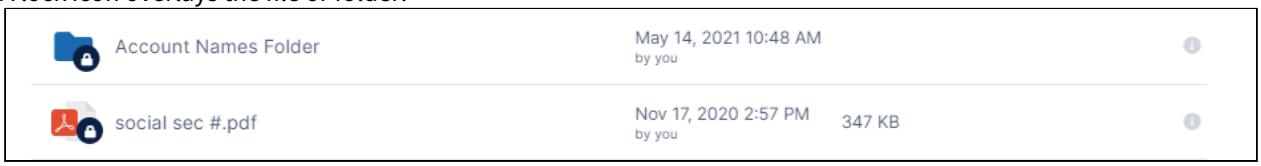
Locking Overview

Locking is available for both files and folders and indicates that you are actively using that file or folder.

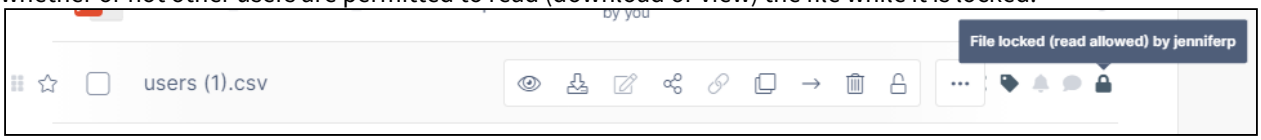
Locking must be enabled by the Administrator before the user has the option to lock a file or folder. FileCloud locking is designed to prevent simultaneous opening/accessing of files by different user accounts. If you lock a file, you are still able to access it.

When a file or folder is locked:

- A lock icon overlays the file or folder:



- When you hover over the file listing, the lock symbol at the end of the row appears bolded.
- The owner of the lock has full access to that file or folder and can modify it.
- Admins can always override a lock using the admin panel.
- A lock can be set up to prevent the locked file from being read. In that case other users cannot download or view the locked file or folder.
- Hover over the lock symbol at the end of the row for the locked file or folder to see the owner of the lock, and whether or not other users are permitted to read (download or view) the file while it is locked.



- All clients (Web Application, Cloud Drive, Cloud Sync, Mobile clients, WebDAV) are subject to the lock restrictions. Only the owner of the lock can access the locked files/folders using these clients.

The following table shows the behavior depending on the type of lock.

Lock type	Access by lock owner	Access by others
Read permitted	Full access to the file is available. Share/ Sync/Edit/Deletes allowed	Only read is allowed. No modification is allowed
Read not permitted	Full access to the file is available. Share/ Sync/Edit/Deletes allowed	No access is provided. All access using all clients is blocked.

Locking a File or Folder

To lock a file or folder,

1. Hover over the file or folder, and click the **Lock** icon.
2. Choose lock options.
   The options available for locks are:
   - **Prevent others from downloading this file while locked.**
   - **Expires** (and expiration date and time) The file or folder is automatically unlocked on the expiration date and time.
3. Click **OK**.
   An **Unlock** icon appears in place of the **Lock** icon.
   In the information symbols, the lock symbol now appears enabled. If you hover over it, the owner of the lock is shown in the tooltip.

Play the following video to see the procedure for locking a file.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

If a folder is locked, no files in that folder or its subfolders can be locked by another user. Furthermore, folders in the parent folder tree cannot be locked by other users. For example, for a folder structure of A_Folder/B_Folder/C_Folder/D_Folder, if C_Folder is locked by USER1, then A_Folder, B_Folder, and D_Folder cannot be locked by USER2 until the lock on C_Folder is released.

To change a lock property (prevent read or change expiration date), the lock must be released, and the file or folder must be re-locked.

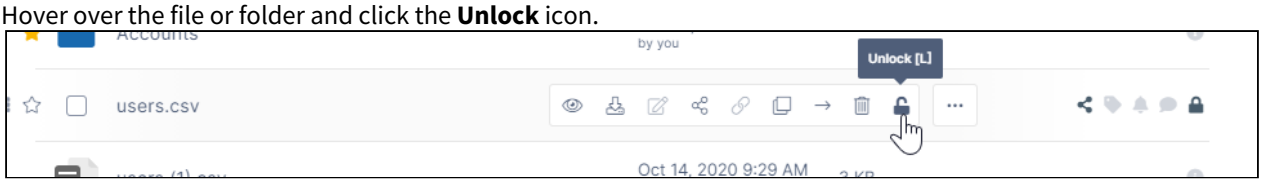
Unlocking a file or folder

Once a file or folder is locked, it can be unlocked only by the owner of the lock or by an administrator.

To unlock as an administrator, see Managing User Locks.

To unlock as the lock owner,

- Hover over the file or folder and click the **Unlock** icon.

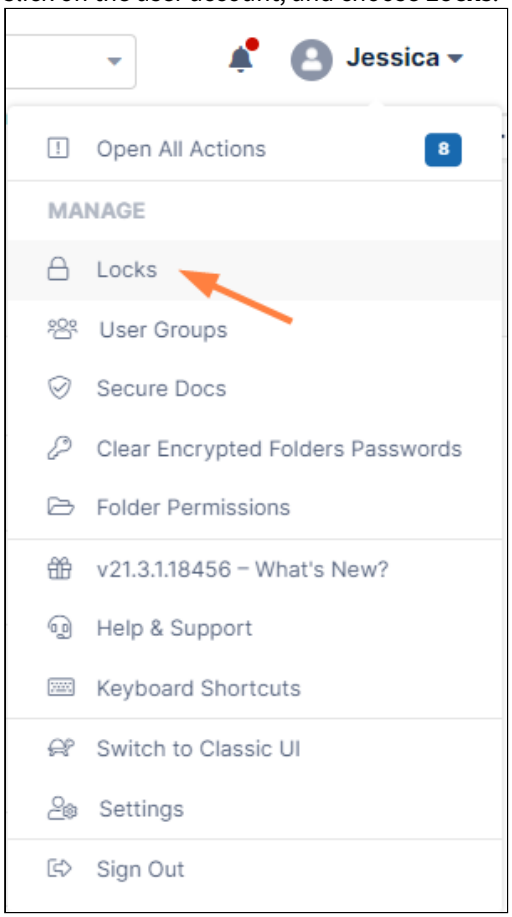


You can also unlock a file using the unlock option in the **Locked Files and Folder** list (see the next section).

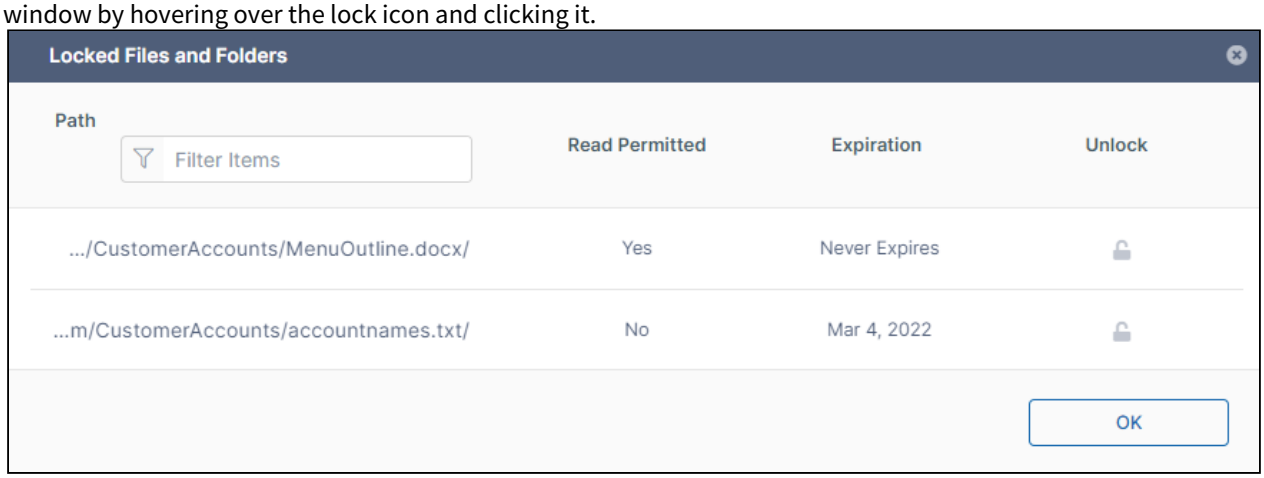
Viewing Locked Files and Folders

To view all of your files and folders that are currently locked:

- Click on the user account, and choose **Locks**.



A list of the files and folders that are currently locked by you opens. The list shows whether other users are permitted to read each locked file or folder and its expiration date if it has one. You can unlock a file from this window by hovering over the lock icon and clicking it.



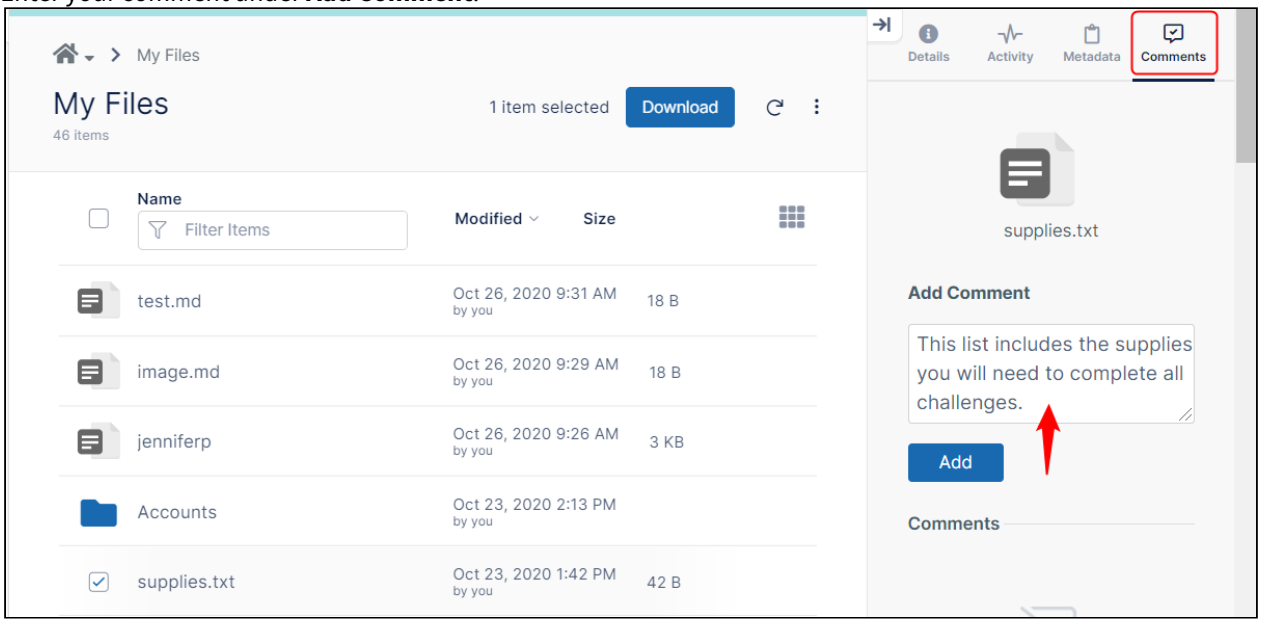
Type in a text string in **Filter Items** to filter the locks by path name or file name.

File and Folder Comments

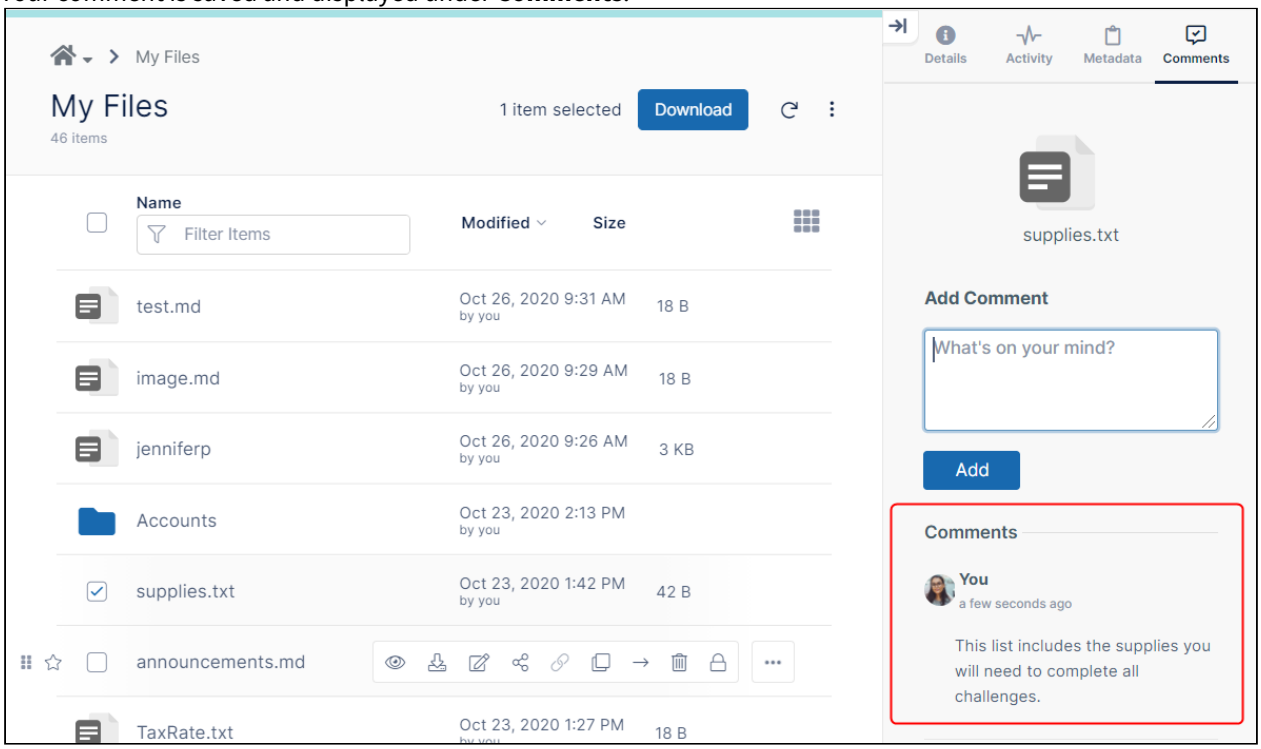
You can add notes about a file or folder in the **Comments** tab of the right panel. You can also read comments that other users have added to a share.

To add a comment:

1. In the User Portal, check the box next to to the file or folder.
2. In the right panel, select the **Comments** tab.
3. Enter your comment under **Add Comment**.



4. Click **Add**.
   Your comment is saved and displayed under **Comments**.

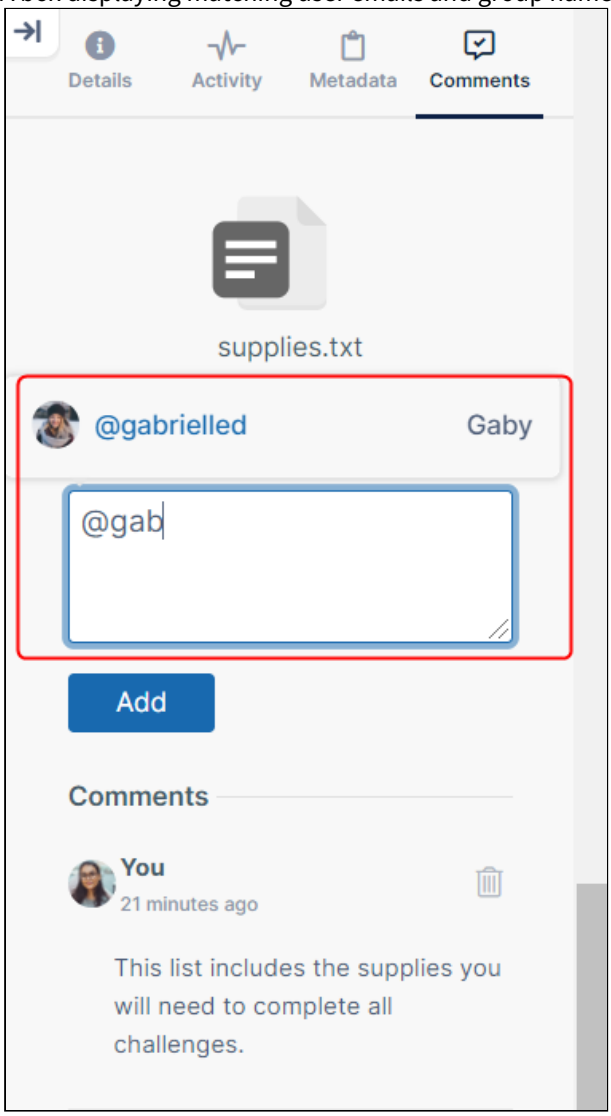


You can mention other FileCloud users or FileCloud groups in your comments by typing the @ symbol and then the name of the user or group. When a user or a group a user belongs to is tagged, the user receives an email as well as a notification on their dashboard in the User Portal telling them that they have been mentioned in a comment.

To tag a user or group in a comment:

1. Access the **Comment** tab for the file or folder using the procedure above, and type @ into the Comment box.

2. Begin to type the user or group name directly after @.
   A box displaying matching user emails and group names appears above the Comment box.



3. Click the email of the user or group that you want to tag to insert their name into the comment.
4. Type the comment.
5. Click **Add**.
   The user tagged or the users in the group tagged receive emails and notifications in FileCloud informing them about the comment.

Freeing up space

During normal FileCloud usage, users may run out of space even if they don't have usable files that exceed the assigned user quota. There are several reasons this can occur.

- If storage of deleted files is enabled, the content of the Deleted Files folder may cause space used to exceed the quota.

- When users edit/modify/upload existing files, then new file versions are created. The number of versions that are retained may cause space used to exceed the quota. The number of versions retained depends on the administrator settings (default is 3).
- When files are uploaded into FileCloud, sometimes the upload is terminated. Some clients try to continue the upload from where it was terminated. Others, such as the browser, restart the upload. This can result in partially uploaded files being present and taking up available space.

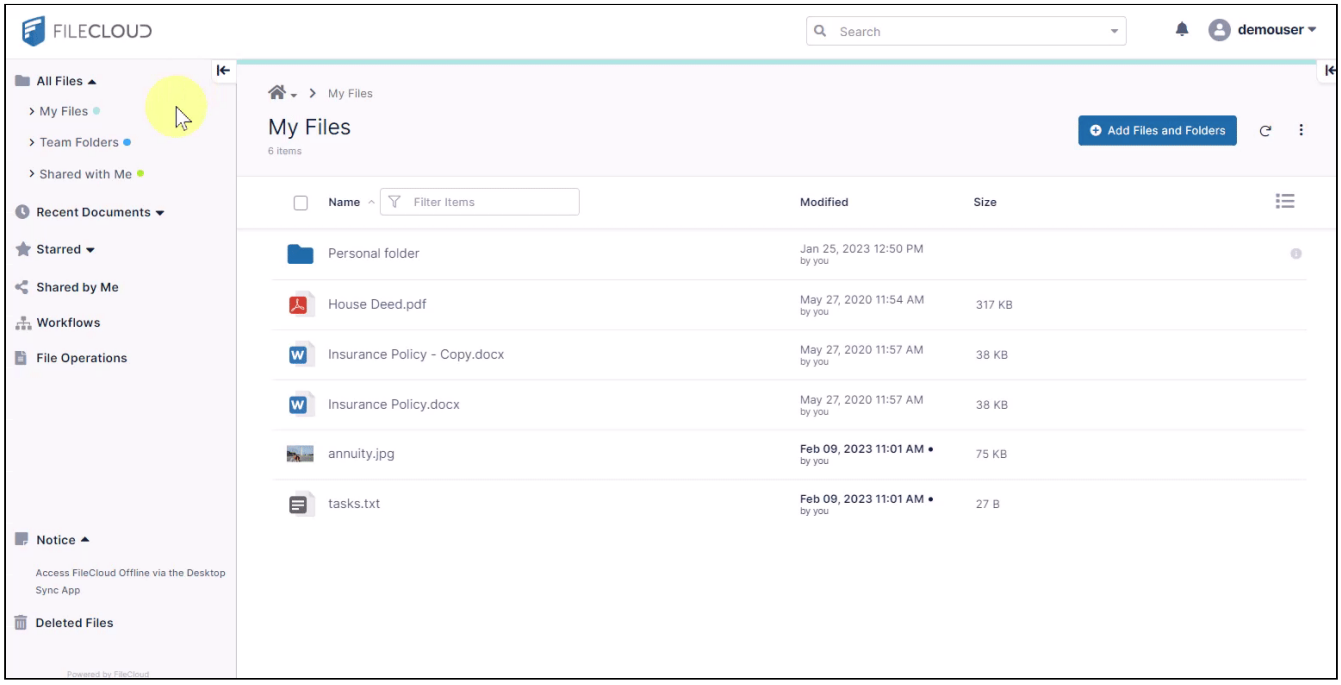
One way to free up space is to delete individual or multiple items from the **Deleted Files** folder. See the section **Permanently Delete Files** on the help page Perform Actions on Deleted Items.

You can also perform the following operations from the **Deleted Files** folder to free up space:

- Remove All Old File Versions
- Clear Incomplete Files

Remove All Old File Versions

You can remove previous versions of all files in your **My Files** folder from the **Deleted Files** folder. Go to the **Deleted Files** folder and click the **More** icon in the upper-right corner of the list. Choose **Remove All Old Versions**.



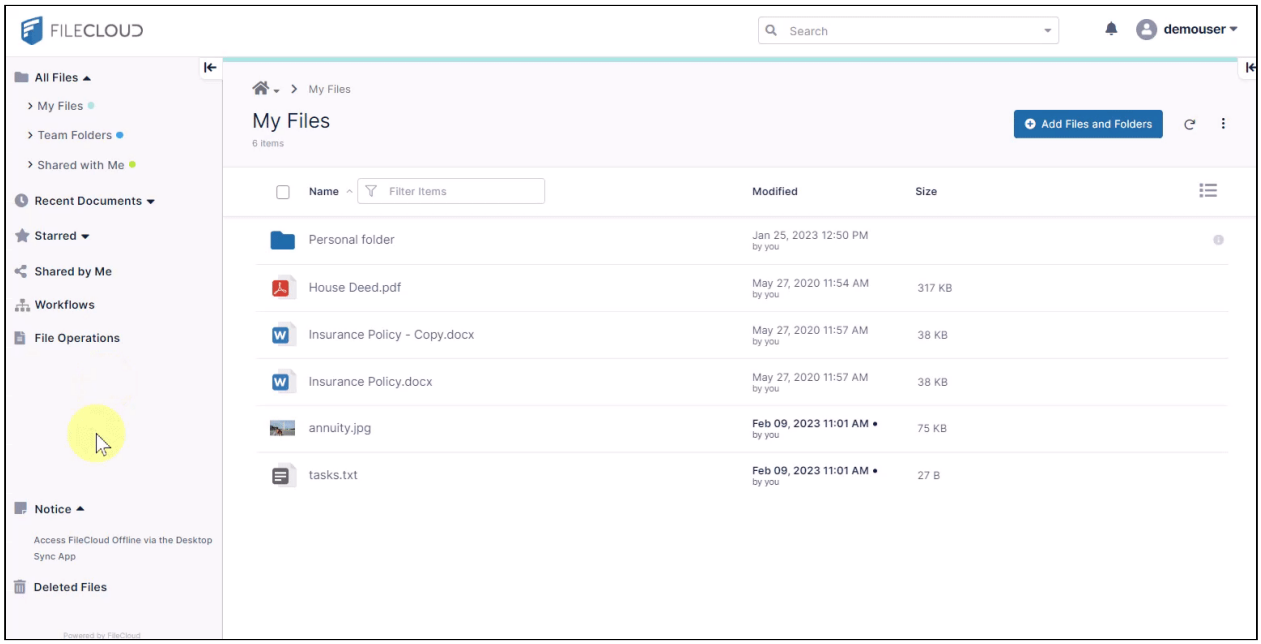
Clear Incomplete Files

When you run out of cloud storage space, you may be able to free up space by removing partially uploaded files from storage. You can do this from the **Deleted Files** folder.

To clear partially uploaded files:

1. Go to the **Deleted Files** folder and click the **More** icon in the upper-right corner of the list.

2. Choose **Clear Incomplete Files**.
   A Clear Incomplete Files dialog box opens.
3. If you want to clear partial uploads that were created less than 24 hours ago, check **Include in-transit**.
4. Click **Remove**.



Creating a Direct Link

In the **Shared With Me** or **Team Folders** sections, you may create a link to a folder or a file to send to users in an existing share without creating a new share.

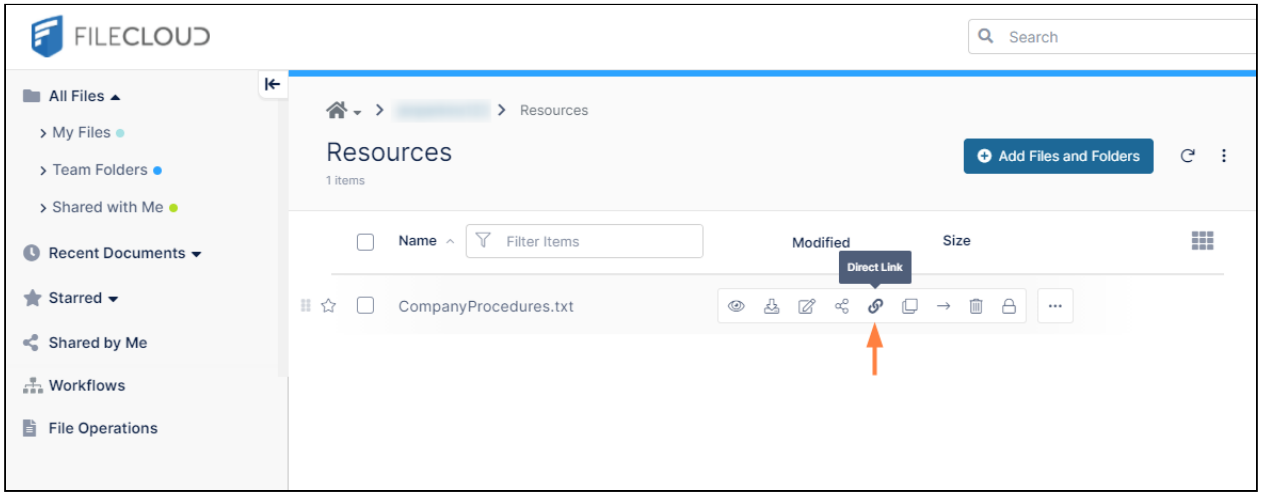
When users click the link, they are prompted to log in and then taken directly to the selected folder or file.

Limitation
For Team Folders, direct links to files in sub-folders that are created by users who have access to the parent folder and sub-folder will not work for users who only have access to the sub-folder, because the links will include the parent folder path, which does not exist in the file structure of those users.

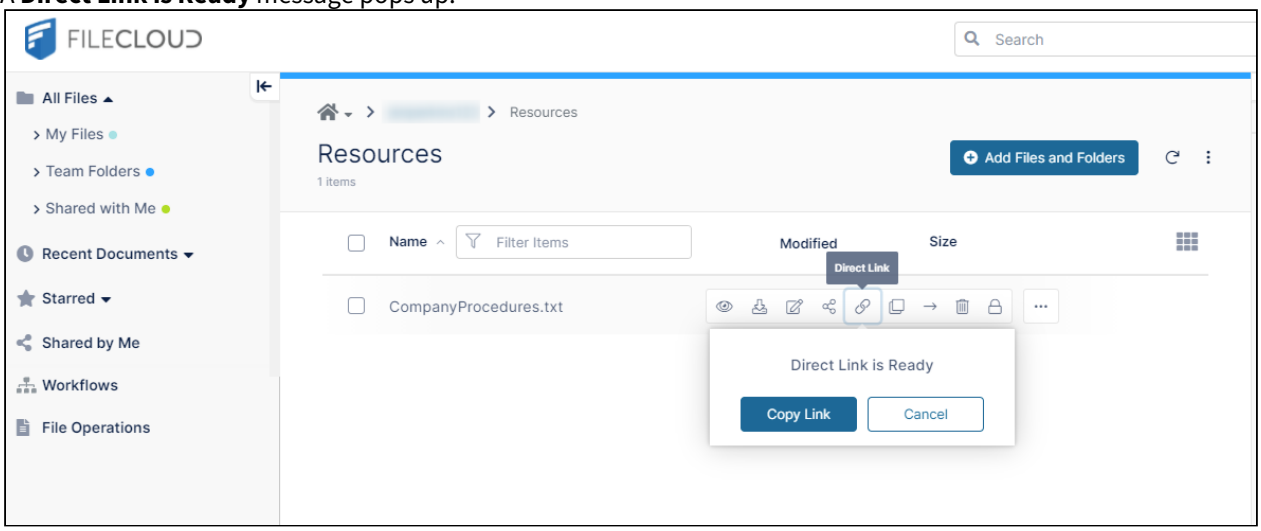
To create a direct link:

1. Navigate to the file or folder in **Shared With Me** or **Team Folders**.

2. Hover over the file or folder and click the **Direct Link** icon.



A **Direct Link is Ready** message pops up.



3. Click **Copy Link**.
4. Paste the link into an email or a file, and send it to users.

Adding Metadata

Metadata support is available beginning with FileCloud 18.1.
Color tag metadata is available beginning with FileCloud 20.3. See Color Tag Metadata.
Assigning metadata sets metadata attribute values to multiple files/folders is available beginning in FileCloud 21.3.
Beginning in FileCloud Version 21.3, file metadata is versioned along with the file, so that when you restore a previous version, you restore the metadata associated with that previous version. In files versioned prior to 21.3, only the most recent metadata was maintained, so that if you restore a previous version, the metadata shows the values entered most recently.

You can provide additional information about files and folders available in FileCloud Server using **metadata.**

FileCloud metadata includes the following components:

1. Attributes - single pieces of information that a user specifies for a file or folder.
2. Metadata set - a group of related attributes with additional properties and settings. A container for attributes.

Metadata enables you to search for files with certain attribute values. For more information, see Metadata Search.

About metadata

See a Description of Metadata Terms

Figure 1. Metadata Terms

Metadata	Attribute	Metadata Set	Tag
Information about the file data. Describes files and folders available in the system.	A single piece of information that describes the file object. In FileCloud, attributes are defined as a part of the metadata set.	A set of metadata attributes that might be logically grouped and can be added as a single entity to files or folders.	An attribute type that allows users to provide multiple keywords for a file or folder.
For example: • Lives in the Human Resources Folder • Has a created date • Has a modified date	For example: • the candidate's photo in their resume	For example, each resume file has a metadata set that includes the attributes: • Photo • Name • Address • Experience • Education • Keywords	For example: HR wants to give a resume file the keywords: • Candidate • New Hire • OnBoarding

Understand When Metadata Sets and Attributes are Added to Files/Folders

In your system, certain metadata sets may automatically be added to folders and files when you create or upload them. Other metadata sets may be available for you to add to files and folders.

The following rules apply to all files and folders and their metadata when you perform an operation:

Operation	Rule
a new file or folder is created	Any automatically applied metadata sets are added to it with all attribute values populated with default values defined

Operation	Rule
a new file or folder is uploaded	Any automatically applied metadata sets are added to it with all attribute values populated with default values defined
a file or folder is copied	Metadata values **are not** copied. Any automatically applied metadata sets with default values are added to the new file object.
a file or folder is moved	Associated metadata values are also moved. The metadata points to the original file or folder during its lifetime.
a file or folder is renamed	Associated metadata values are also renamed. The metadata points to the original file or folder during its lifetime.
a file is removed and moved to Deleted Files	The associated metadata values are updated so they point to the file in **Deleted Files**.
a file is permanently removed from FileCloud Server	The associated metadata values are removed as well.

Why Can't I see the Metadata Tab?

Your administrator must grant you permission before you can see the **Metadata** tab.

Your administrator can grant the following types of permissions:

- Write access - you can add and remove metadata sets to files and folders, and edit their values.
- Read access - you can only view values of the already associated metadata sets.

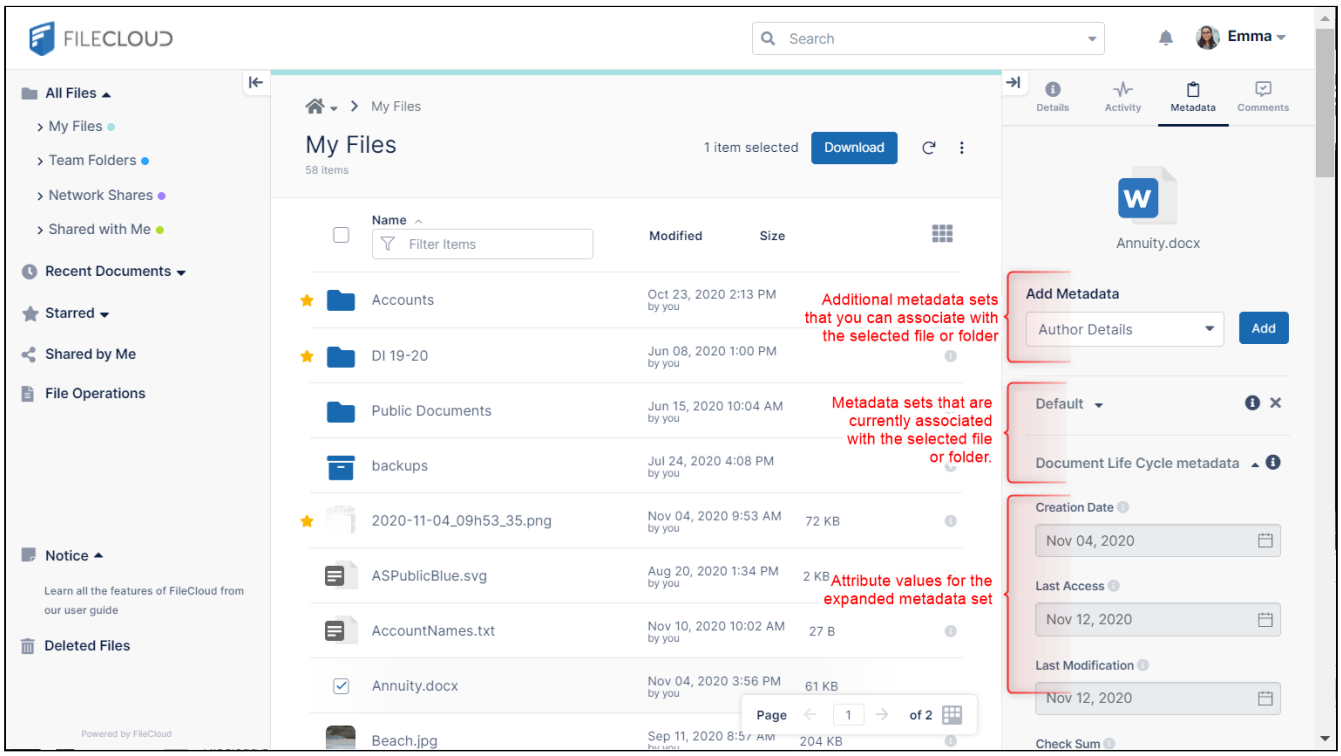
Viewing metadata

View the Metadata for a File or Folder

Metadata appears in the right panel for the selected file(s) or folder(s) when you click the **Metadata** tab. When multiple files or folders are selected, only metadata sets and metadata values that are set for all of them appear in the right panel.
The **Metadata** tab displays the following:-

- metadata sets that are currently added to the selected file(s) or folder(s).
- a list of any additional metadata sets that can be added to the file(s) or folder(s).
- a list of added metadata sets with corresponding attribute values.

Note: Currently Color Tag metadata does not appear in the right panel.



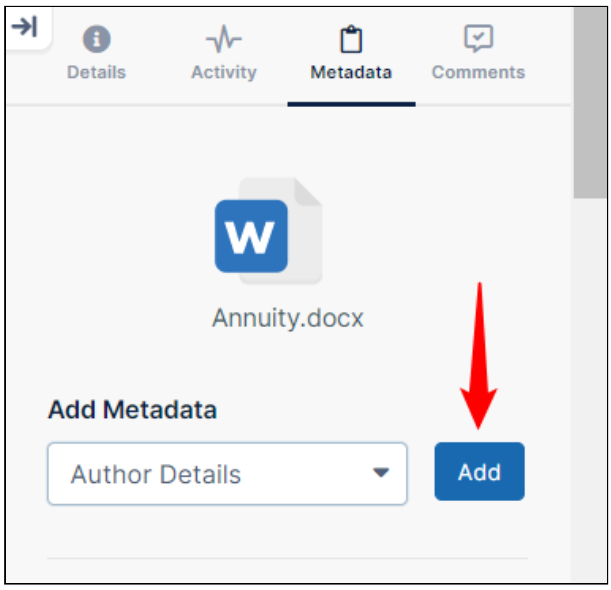
Adding metadata

Add Metadata Sets to Individual Files or Folders

To add a metadata set to a file or folder:

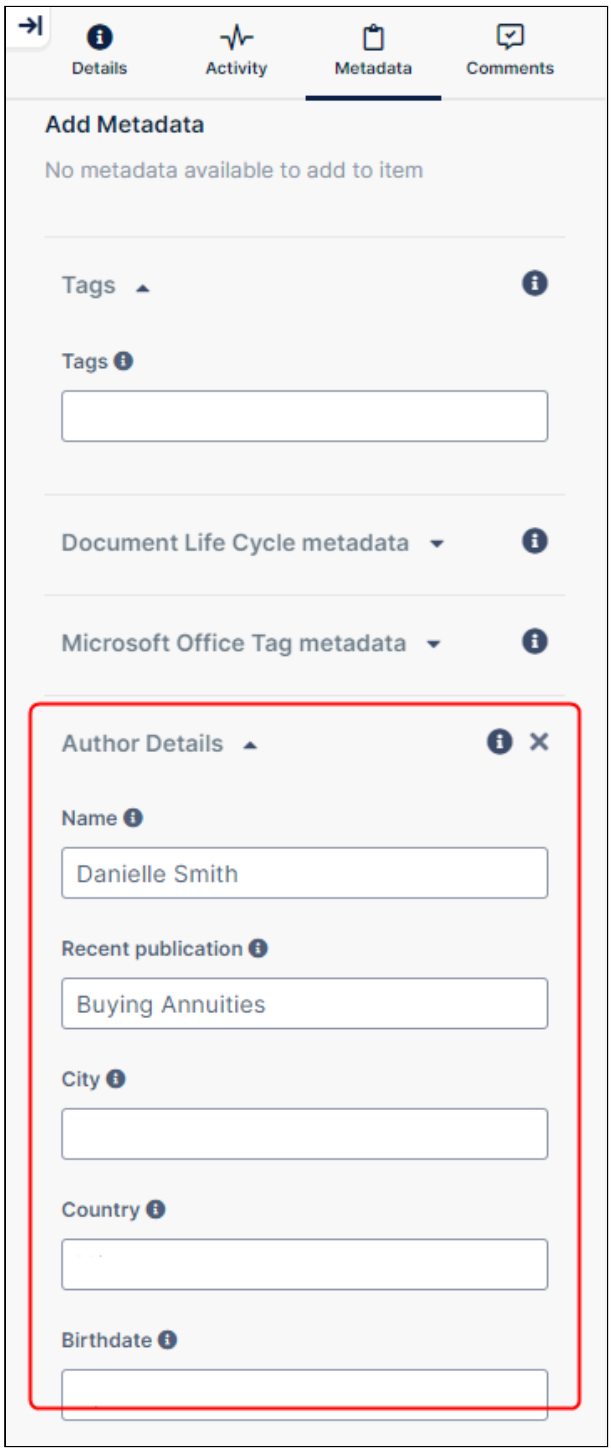
1. Select the file or folder.
2. In the right panel, click the **Metadata** tab.
3. In **Add Metadata**, Select one of the available metadata sets. Note: The metadata set must not already be added.

4. Click **Add**.



5. The newly added metadata set with corresponding attributes is displayed.

6. Enter new values for the attributes.



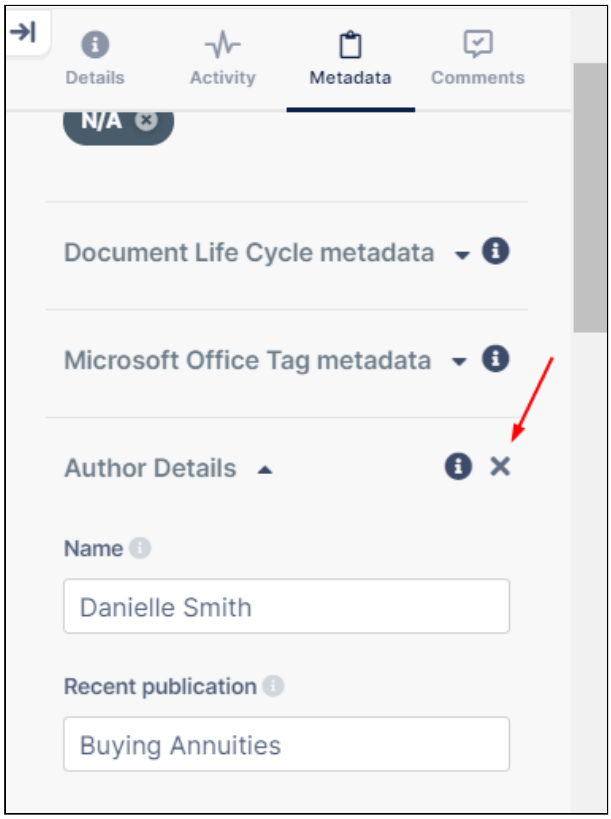
To edit the values of attributes:

1. Select the file or folder.
2. In the right panel, click the **Metadata** tab.
3. Expand the attribute set.

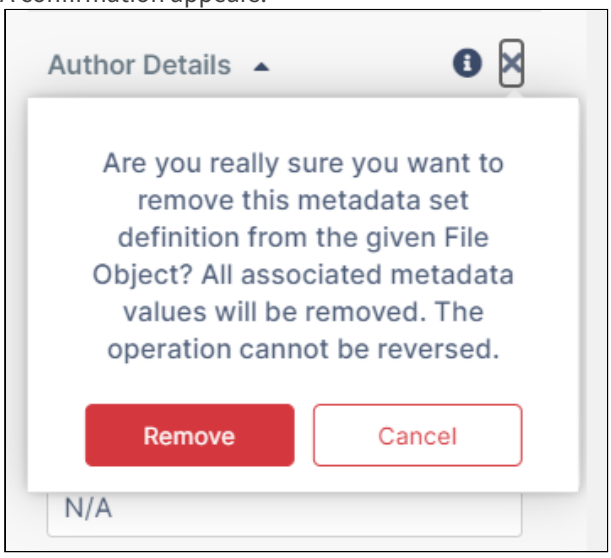
4. Modify any of the values.

To remove the metadata set from the file/folder:

1. Click the **x** next to the metadata set name.



A confirmation appears:



2. Click **Remove**.
The metadata set is removed from the file or folder.

Video: Add Metadata

Play the video to view the procedure for adding a metadata set and attribute values.

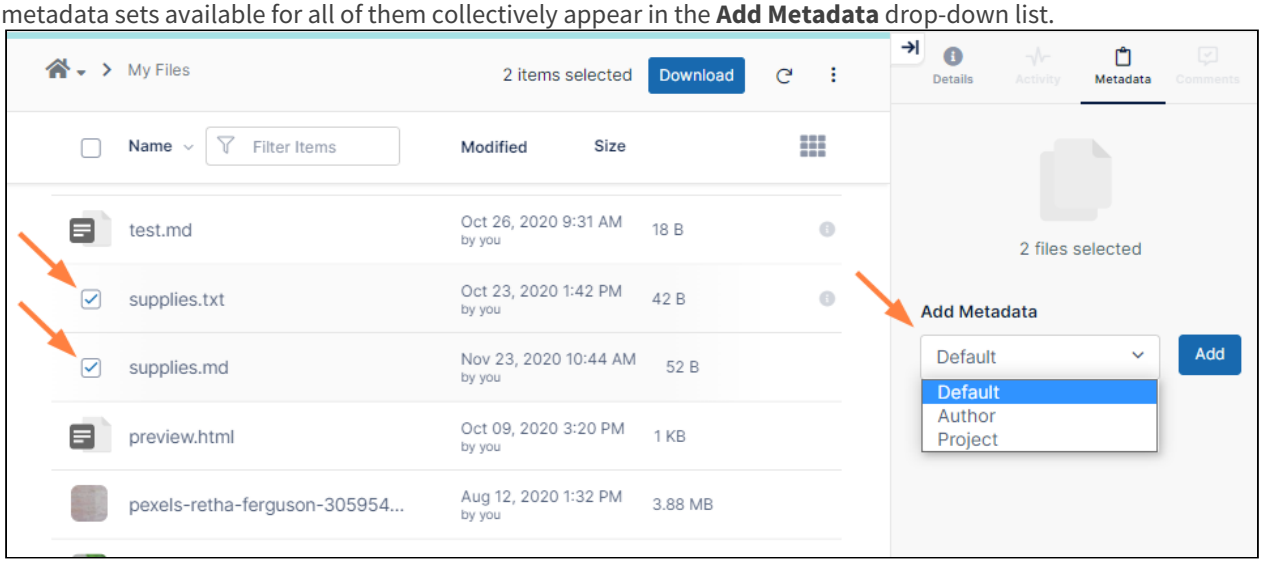
Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

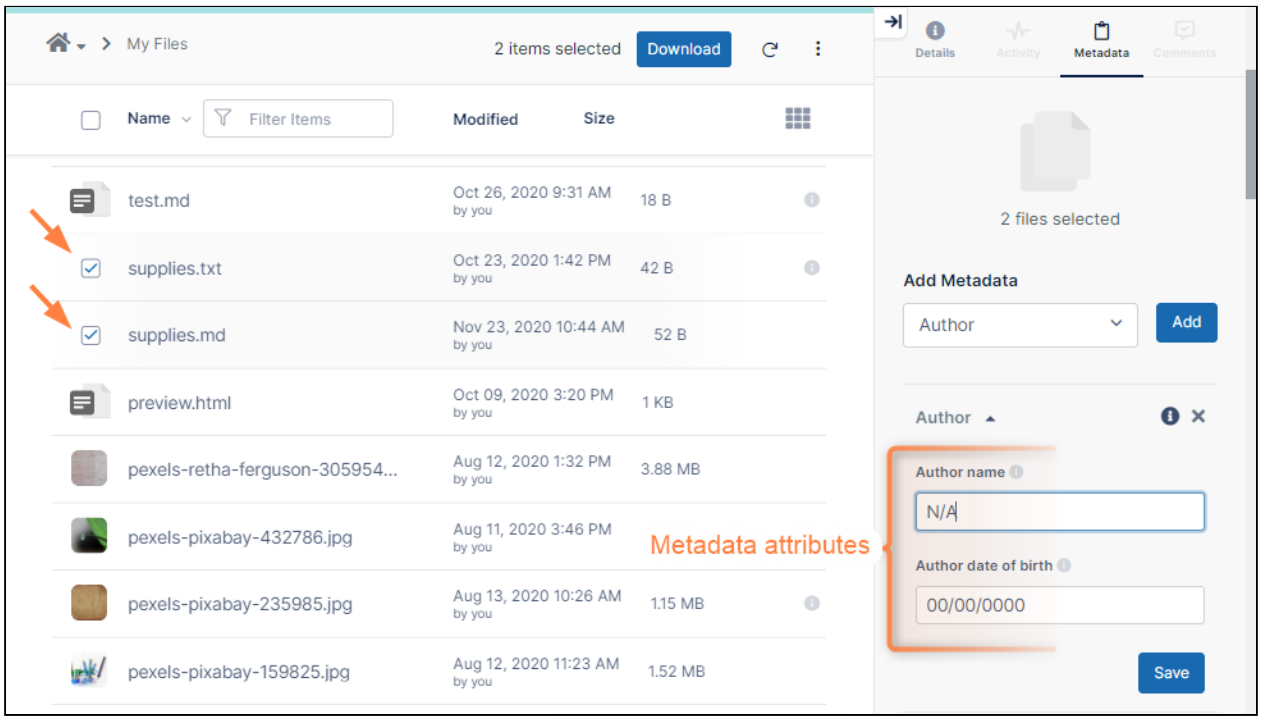
Add metadata sets to multiple files and folders

To add a metadata set to multiple files and folders:

1. Select the files or folders.
2. In the right panel, click the **Metadata** tab.
   Regardless of whether metadata sets have already been assigned to all of the files/folders selected, the metadata sets available for all of them collectively appear in the **Add Metadata** drop-down list.



3. In **Add Metadata**, select one of the available metadata sets.
4. Click **Add**.
   The metadata set appears below the **Add Metadata** drop-down list with all metadata attribute values blank or set to their defaults.



The metadata is added to the selected files/folders that do not have the metadata set assigned to them already.

5. Add or change values of one or more of the attributes.
6. Click **Save**.
   The values for the metadata attributes are saved for all selected files/folders.
   (If you click **Save** without changing any of the values of the attributes, selected files/folders that already have the metadata set assigned to them maintain whatever values they already have for the attributes.)
   Note: If you uncheck the files/folders and recheck them again, all of the metadata sets appear in the **Add Metadata** drop-down list, including those you have assigned collectively to all them. If you add the metadata set again, the attributes appear with blank or default values whether or not the individual files/folders contain values for those fields.

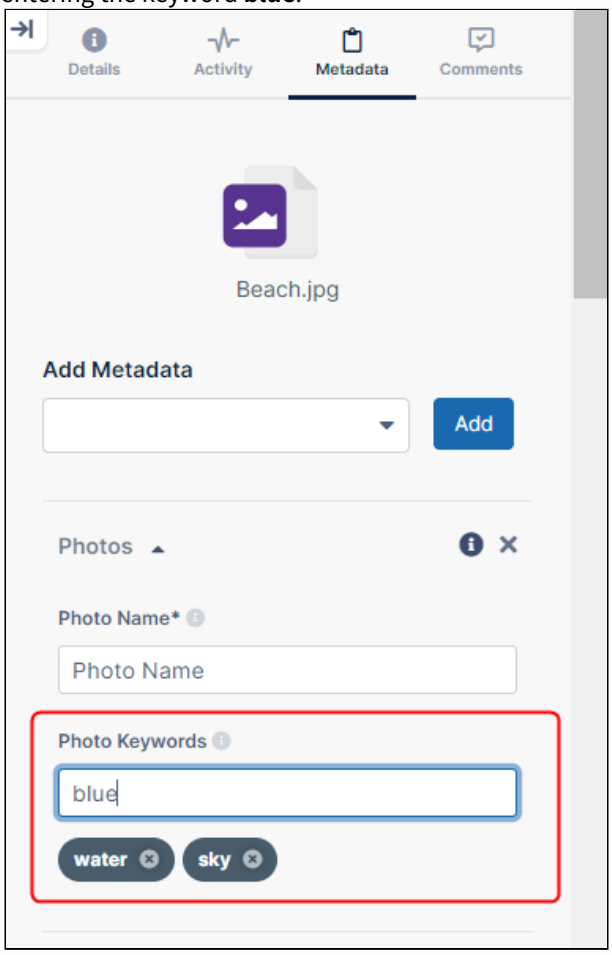
Using tag attributes

Tag Attributes

Tag attributes

Tag attributes allows users to provide multiple values for a single attribute. This is useful for providing keywords for searching on files. For example, if you had an archive of photos that you want users to be able to search through, you could add a tag attribute for adding keywords describing each photo's colors, backgrounds, and subjects.

Tag values are entered in an editor that appears as a single text field, but can be used to enter multiple text fields. When you enter a string and click *Enter (*or enter a series of strings separated by commas and click *Enter)*, the new value(s) appear below the control. Each value is a tag. Individual tags can be removed by pressing the **x** that appears on them.
In the following image, a user has added the keywords **water** and **sky** for a photo of a beach, and is now entering the keyword **blue**.



Video: Add Keywords to a Tag Attribute

Play the video to view the procedure for adding keywords to a tag attribute.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

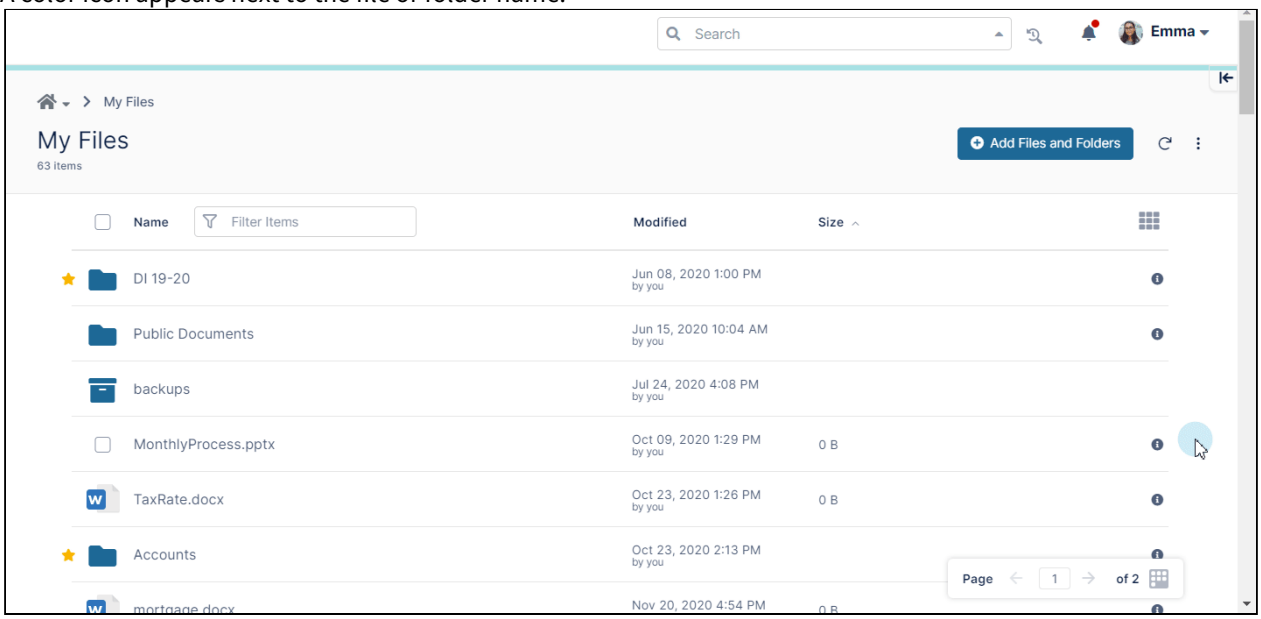
Color Tag Metadata

> Color tag metadata is available beginning with FileCloud Version 20.3.
> Color tags can only be applied to files and folders in the new interface, but searching can be performed on color metadata in both the classic and new interfaces.

Color tag metadata enables you to assign colors to files and folder for categorization and searching.

To apply a color tag to a file or folder:

1. Hover over the file or folder and click the **More** (three dot) icon.
2. At the bottom of the menu, hover over **Apply Color Tag**, and choose a color.
   A color icon appears next to the file or folder name.



To search by color tag:

- You can search by color tag in the same way you search on any other metadata property. See Metadata Search.

DRM for exporting secure documents

> The Digital Rights Management (DRM) file export feature (DRM) available for licensed users beginning in FileCloud 20.2.
> Although the DRM file export feature is available for most types of Office files, it is not available for Excel file types.

FileCloud's Digital Rights Management (DRM) file export feature helps you securely distribute Office files, PDFs, and image files and restrict users' actions on their content. For example, you can prevent screenshots and screen sharing of

secure documents.

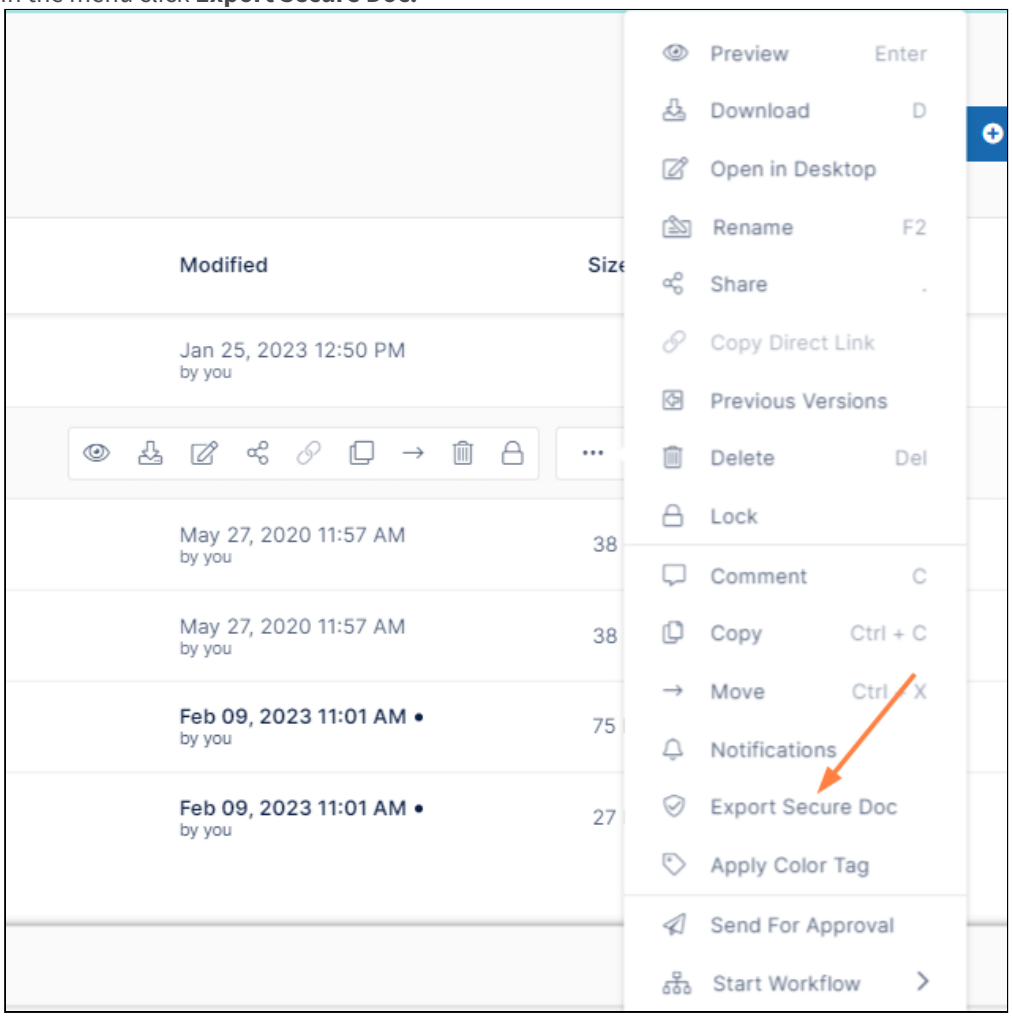
FileCloud's Secure Document Viewer for viewing securely downloaded files is not the same as FileCloud's Secure Web Viewer for viewing securely shared files, introduced as a beta version in FileCloud 23.232. The Secure Document Viewer is a stand-alone app, while the Secure Web Viewer is web-based, and not yet fully released.

Download a document securely using DRM

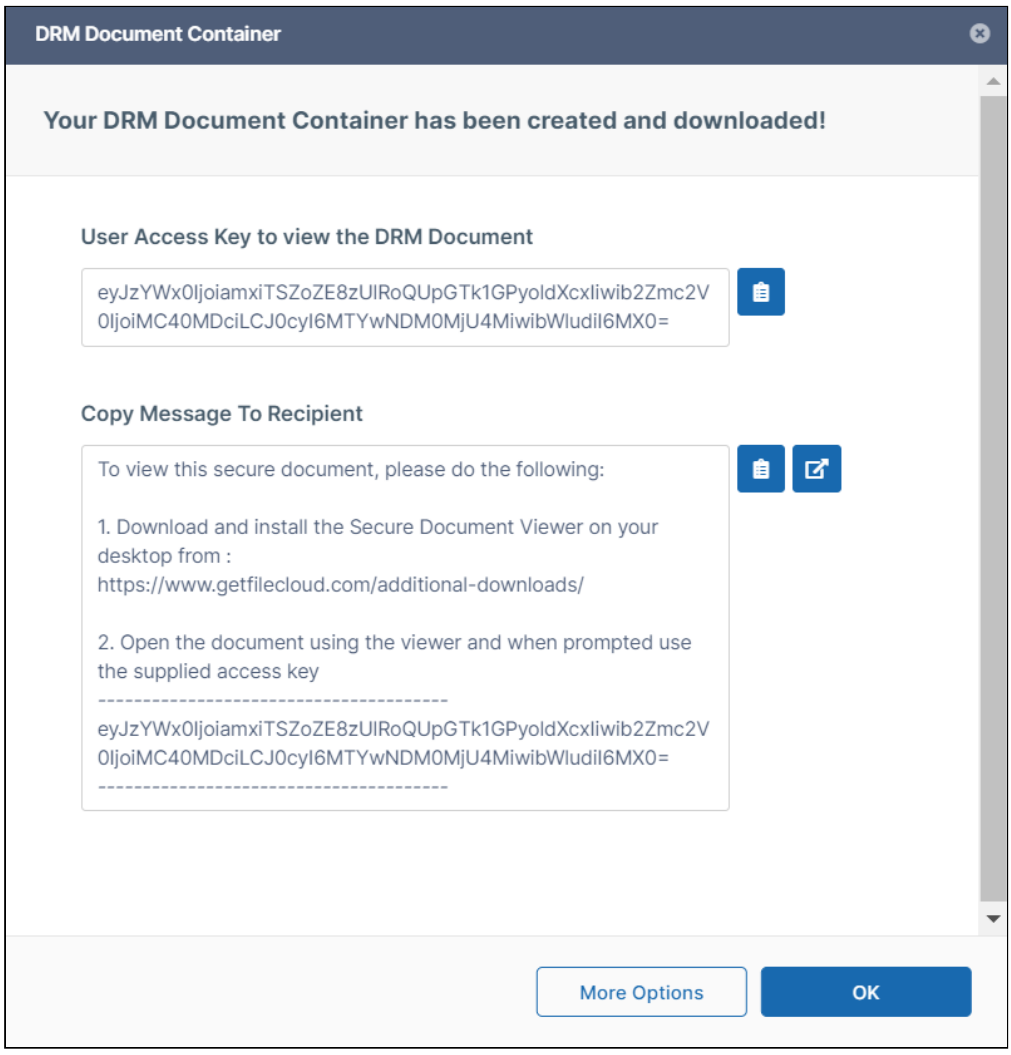
If your FileCloud license includes secure downloads, any file of a type that is supported by DRM (**jpg**, **png**, **docx**, **pptx**, and **pdf**) has the **Export Secure Document** option enabled. When you export a document securely, users must view it through the FileCloud Secure Document Viewer using an access key.

To download a document securely and give a user access to it:

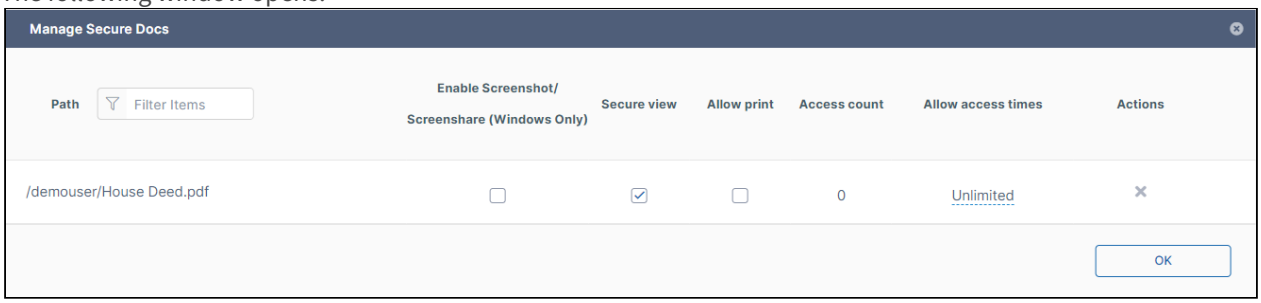
1. Hover over the listing for the file and click the **More** icon.
2. In the menu click **Export Secure Doc.**



3. The file is downloaded in a document container. Save the document container.
The following window opens. It lists the key required to view the document as well as a message to send to recipients.



4. To change the recipient's permissions for the file, click **More Options**.
The following window opens:



By default only **Enable Secure View** is checked. Check or change any of the options and click **OK**.

Option	Description
Enable Screenshot/Screenshare (Windows only)	Allows Windows users to take screenshots of the file and to share their screen when the file's contents are displayed.

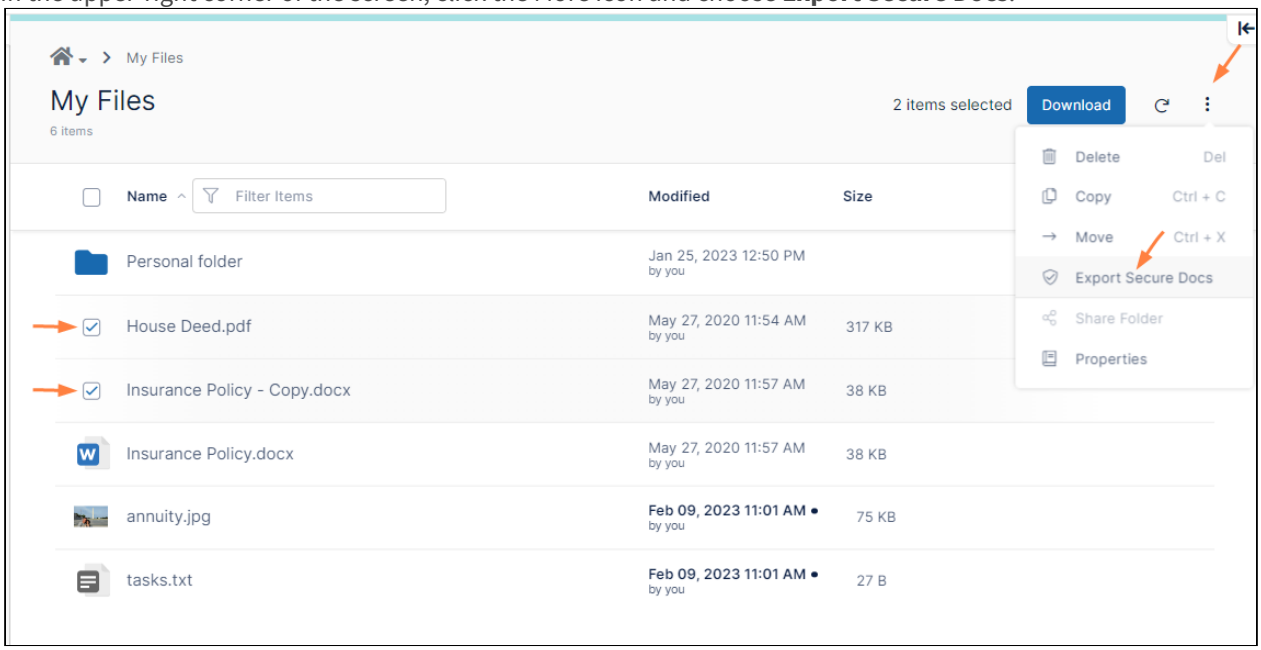
Secure view	Allows users to view the file through the secure viewer.
Allow print	Allows users to print the file.
Access count	Keeps a tally of how many times the file has been accessed.
Allow access times	Limits the number of times the file can be accessed to this number.
Actions	X removes users' ability to view or otherwise access the file.

5. Copy the message from the **DRM Document Container** window.
6. Send the message and the file to the recipient.
   You may also upload the file to FileCloud and share it with recipients. Make sure you send the key and the download link for the FileCloud Secure Viewer to the recipients.

Download multiple secure documents

You can download multiple documents securely at the same time:

1. Check the box next to each file.
2. In the upper-right corner of the screen, click the More icon and choose **Export Secure Docs**.

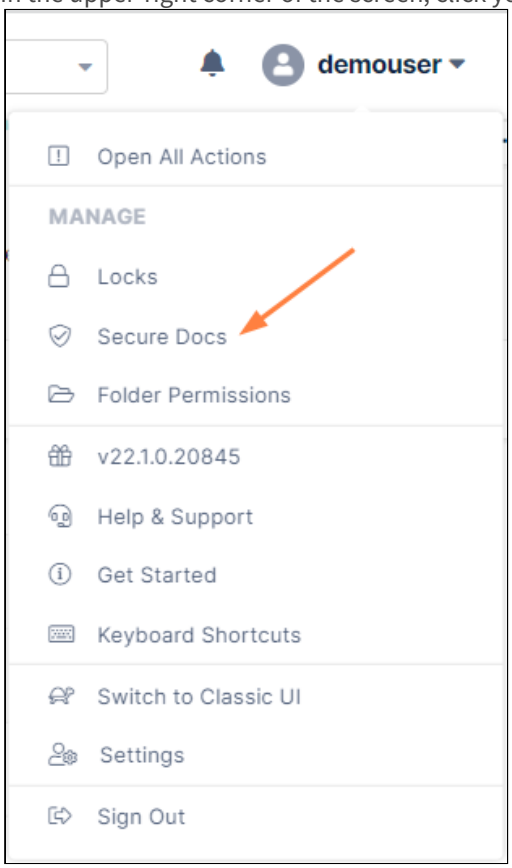


   The files are downloaded in one document container.
3. Continue from Step 3 in the preceding procedure.
   When you open the document container, both documents are available for viewing in the FileCloud Secure Document Viewer.

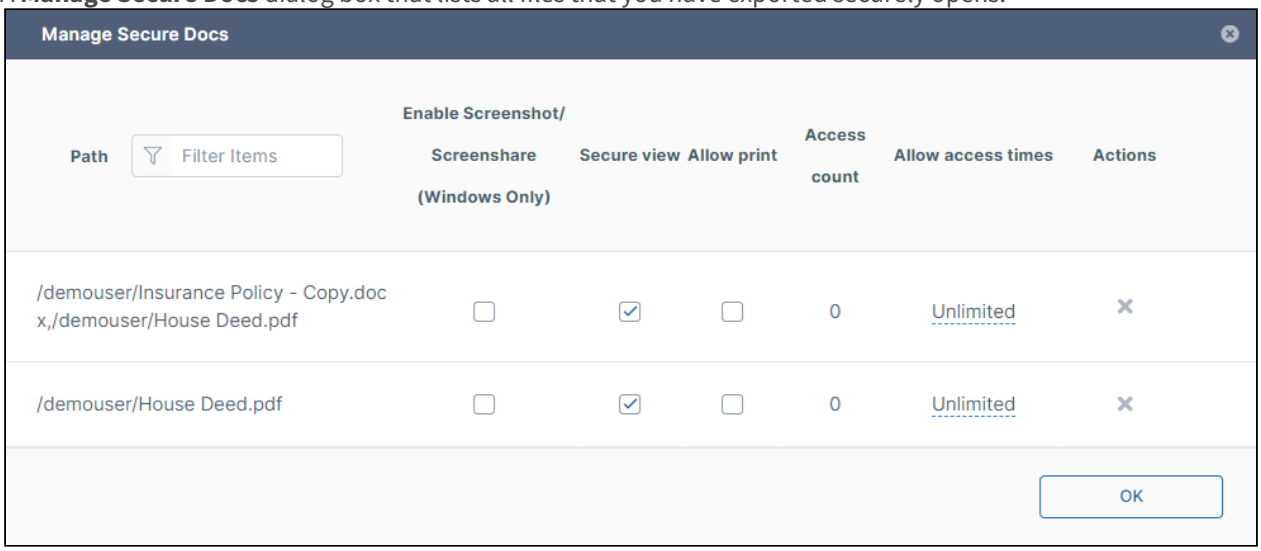
Change viewing options for secure documents after download

You can view all of your securely downloaded documents and change permissions on them at any time:

1. In the upper-right corner of the screen, click your username and choose **Secure Docs**.



A **Manage Secure Docs** dialog box that lists all files that you have exported securely opens.

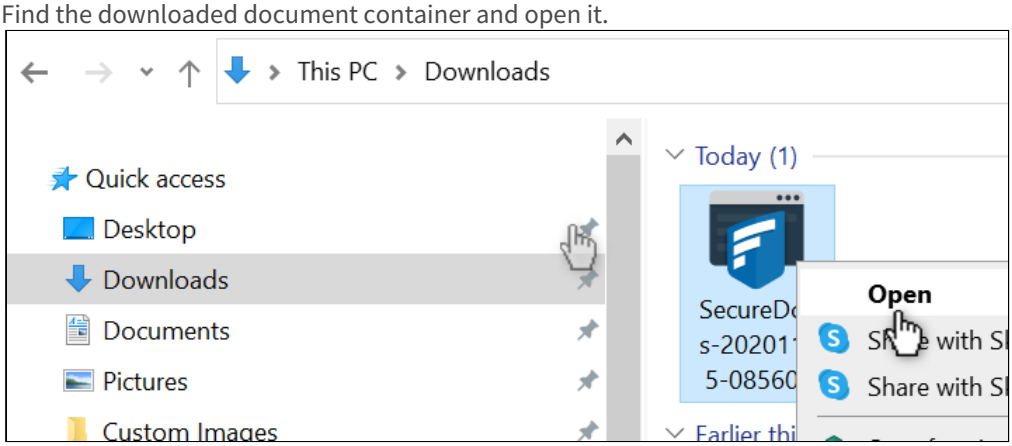


2. Check or change options for any of the files.

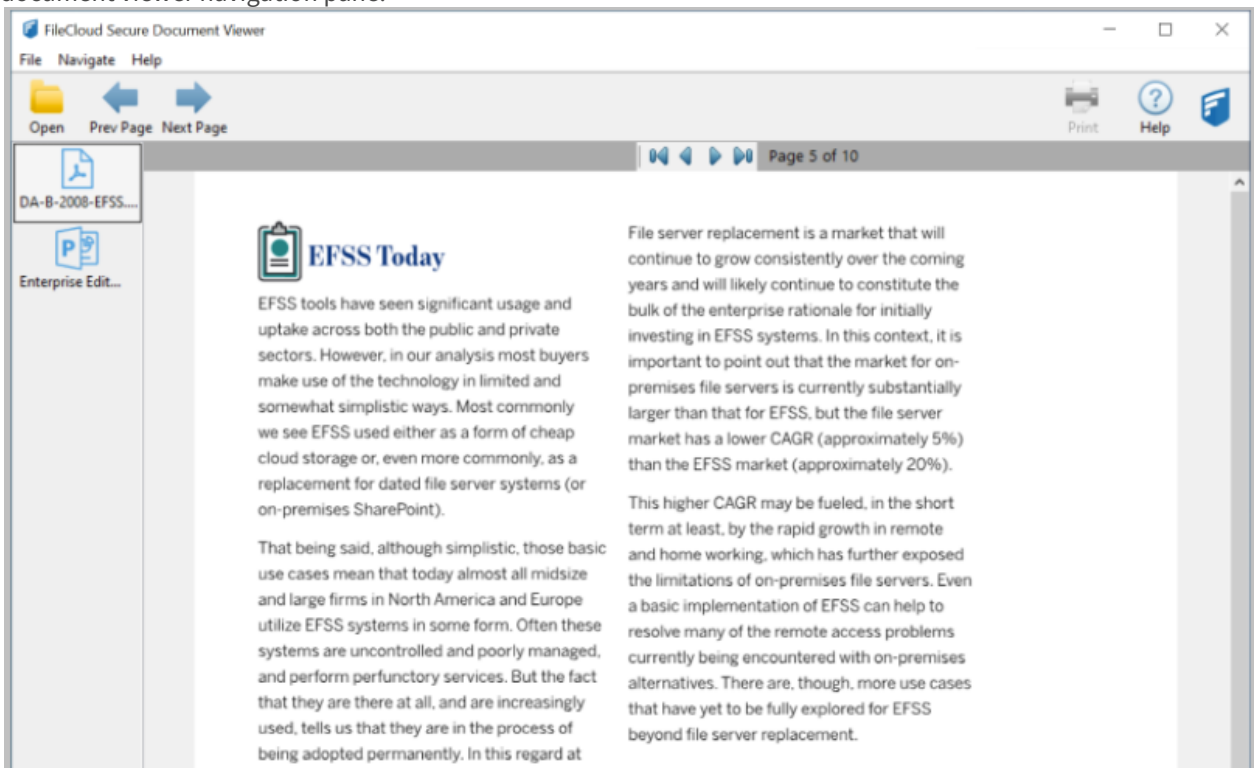
Open a document in the FileCloud Secure Document Viewer

To view documents in the FileCloud Secure Document Viewer:

1. If you have not downloaded the FileCloud Secure Document Viewer, download it from https://www.filecloud.com/additional-downloads/.
2. Find the downloaded document container and open it.



3. Enter the password supplied when the document container was downloaded.
The file(s) in the container open in the FileCloud Secure Document Viewer.
In the following image, two documents were downloaded to the document container, so both appear in the document viewer navigation pane.



More Information:

FileCloud Videos	FileCloud Blogs
	• FileCloud Aurora: All About DRM Capabilities • Protect, Track and Control Confidential and Sensitive Documents After Distribution With FileCloud DRM

Work with Email Files

To work with email files, click Switch to Classic UI.

As a FileCloud user, you can now access a viewer for email files (.eml).

On the User Portal, you can open an email file to:

- View the From, To, Subject and Body
- View any file attachments
- Forward that email without any change to other email addresses

What do you want to do?

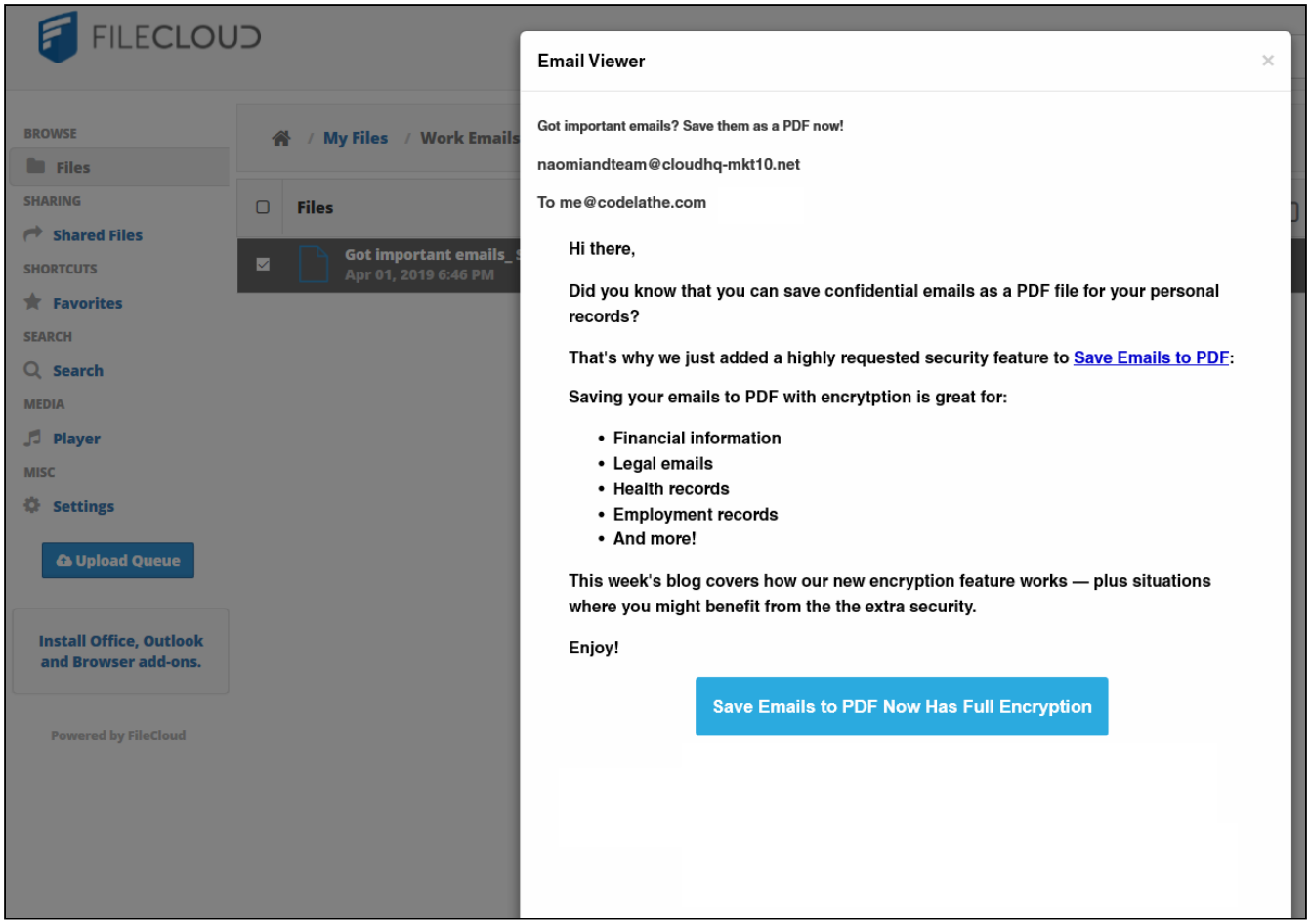
Upload an email file

Uploading an email is the same process you use for any other file.

Upload a file

Open an email file

Opening an email file allows you to read the message, view any attachments, and forward the email to anyone with an email address without any change to email addresses that were originally on the email.



To open an email file:

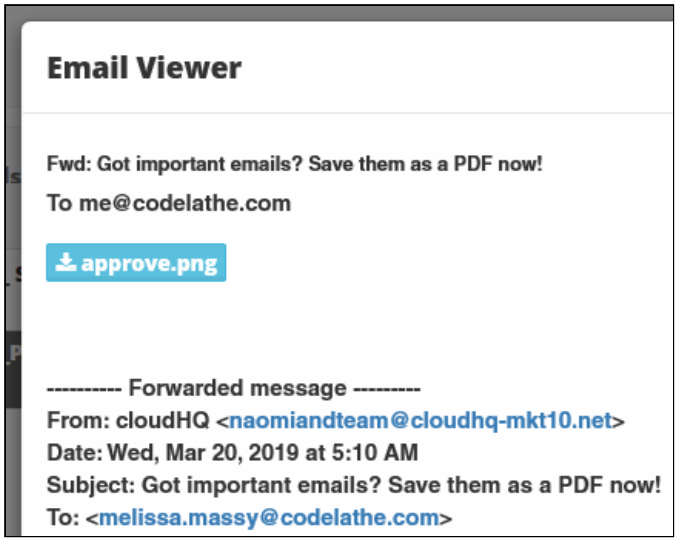
1. Open a browser and log in to the *User Portal*.
2. Navigate to the email file you want to open.
3. Click the file name.
4. Above the file listing, click the *Open* button.

View Attachments

Attachments display at the top of the viewer next to the *Subject* and the *Sender's* address.

-
- Attachments are displayed in a blue box with a download arrow
- You can click on the blue box to open the attachment

In the following example, the attachment is called *approve.png*.



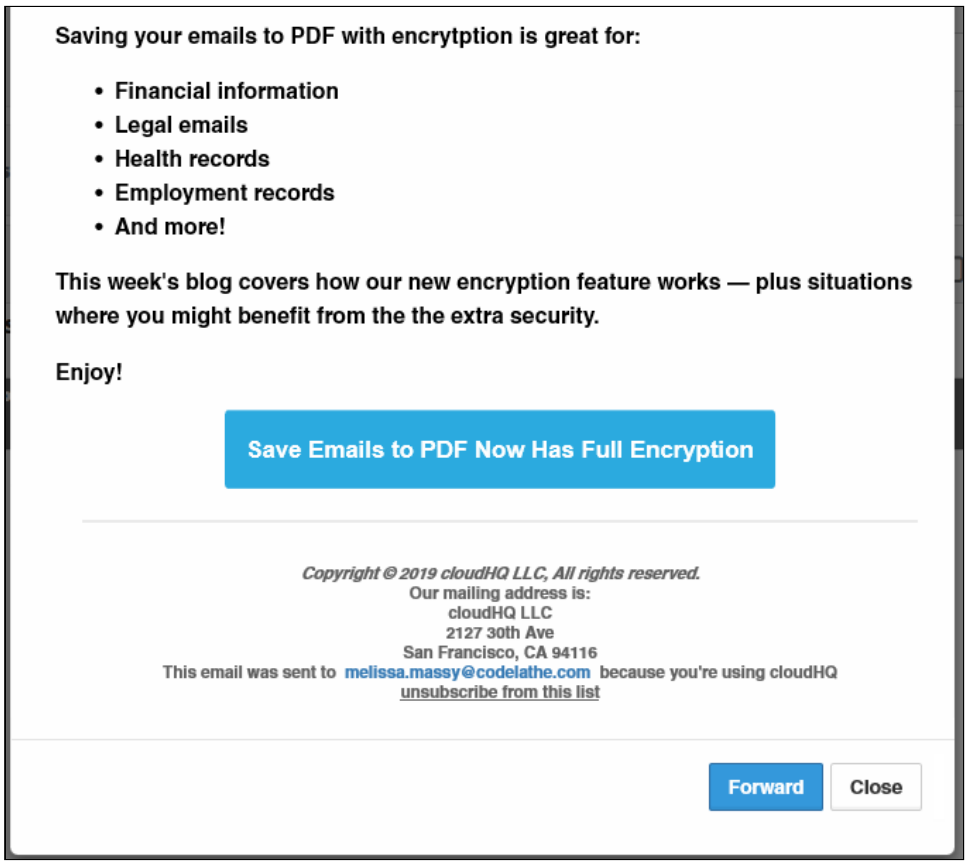
To open an attachment:

1. Open a browser and log in to the *User Portal*.
2. Navigate to the email file you want to open.
3. Click the file name.
4. Above the file listing, click the *Open* button.
5. In the viewer, to open an attached file, click on the attachment icon.

Forward the email

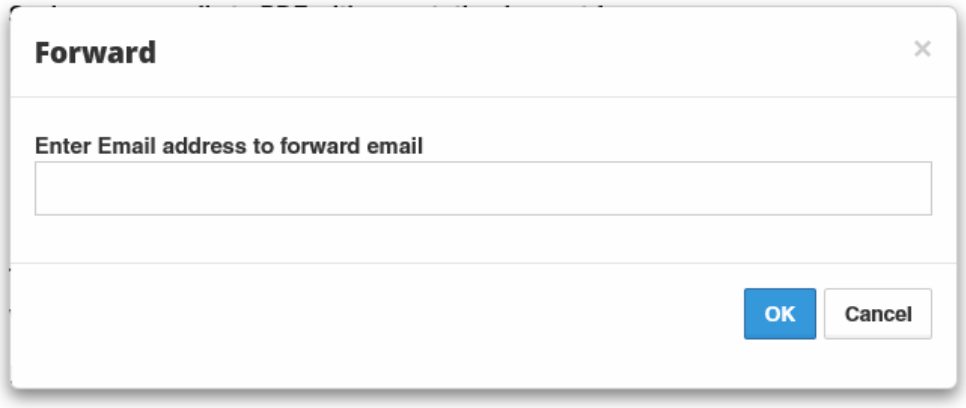
Once you open the email file, you can forward the email to anyone with an email address.

- You will not be able to change any of the email addresses that were originally on the email
- Any email addresses on the original email will be preserved and will display correctly in other email applications
- You cannot identify a CC: recipient
- You will not be able to edit the Subject line



To forward the email message:

1. Open a browser and log in to the *User Portal*.
2. Navigate to the email file you want to open.
3. Click the file name.
4. Above the file listing, click the *Open* button.
5. In the viewer, scroll to the bottom of the email, and then click on the *Forward* button.
6. In the *Forward* dialog, type in the email address where you want to forward the message.
7. To send the message, click *OK*, and then in the email viewer, click *Close*.



Share the email

Sharing an email is the same process you use for any other file.

Sharing a file

User Groups

The ability to create and manage groups from the user portal is available beginning in FileCloud Version 21.2

User groups that you create in the user portal function similarly to the groups managed by your system administrator.

User groups enable you to share content or send notifications to all users in groups that you have created or are a member of at once.

Your Admin must give you permission to create, manage, and delete user groups. Otherwise, these options are not visible to you. If you are an Admin, see Giving Users Group Management Permissions.

To add a user group:

1. In the upper-right corner of the user portal, click the arrow next to your user name, and choose **User Groups**.
   The **User Groups** dialog box opens.
   The groups that are visible to you depend on your permissions. Admin-created groups, groups you have created, and other groups that you are a member of may be visible.
2. In the **User Groups** dialog box, click **Add a Group** and enter a **New Group Name**.
3. Click **Add Group**.
4. Enter the user names or email address of users you want to add to the group, and click **Add**.
5. Click **Close**.
   The group is added.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

To add and remove members from a group:

You may add members to any group, including those that you have not created, if your Admin gives you permission to edit groups. If you don't have a policy that allows editing groups, but your Admin has given you permission to edit specific groups, you can add and/or remove members from those groups.

Admins and other users with edit permissions for groups may edit your groups.

1. In the upper-right corner of the user portal, click the arrow next to your user name, and choose **User Groups**.
   The **User Groups** dialog box opens.
   The groups that are visible to you depend on your permissions. Admin-created groups, groups you have created, and other groups that you are a member of may be visible.
2. To add or remove members from a group, click the Edit button under **Manage**.
3. Search for members to add to the group and add them, or click **x** next to members to delete them.
4. Click **Close**.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

To delete a user group:

You may delete any group, including those that you have not created, if you have a policy that allows deleting groups.

Admins and other users with delete permissions for groups may delete your groups.

1. In the upper-right corner of the user portal, click the arrow next to your user name, and choose **User Groups**.
   The **User Groups** dialog box opens.
   The groups that are visible to you depend on your permissions. Admin-created groups, groups you have created, and other groups that you are a member of may be visible.
2. To delete a group, click the **Delete** button under **Manage**.
3. Click **Remove** in the confirmation dialog box.
   The group is deleted.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

File Approval

Beginning with FileCloud 23.1, notifications sent when approval is requested include a link for accessing the approval screen.

The ability to request file approval is available beginning in FileCloud 21.2.

When you request that another user approve a file, you are simply asking for confirmation that the file is okay. You are notified of the approver's response, but the response does not alter the file's status.

To request approval of a file:

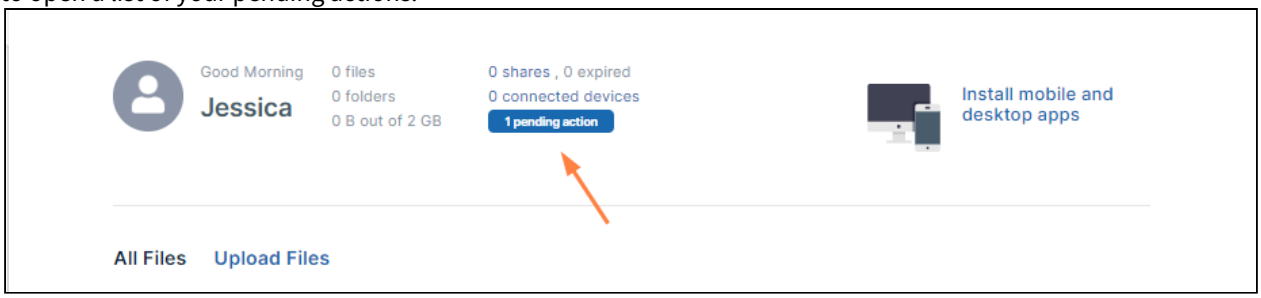
1. Hover over the file and click the More (3 dots) icon, then choose **Send for Approval**.
   A **Send File for Approval** dialog box opens.
2. In **Users**, enter the usernames or email addresses of existing FileCloud users, and/or in **Groups**, enter names of FileCloud groups.
   If you enter a group, notifications are sent to each user who is currently a member of that group.
3. You may change the note in **Message** or leave the default of **Please, approve this file**.
4. Click **OK**.
   The approval is sent to the approvers' inboxes in FileCloud.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

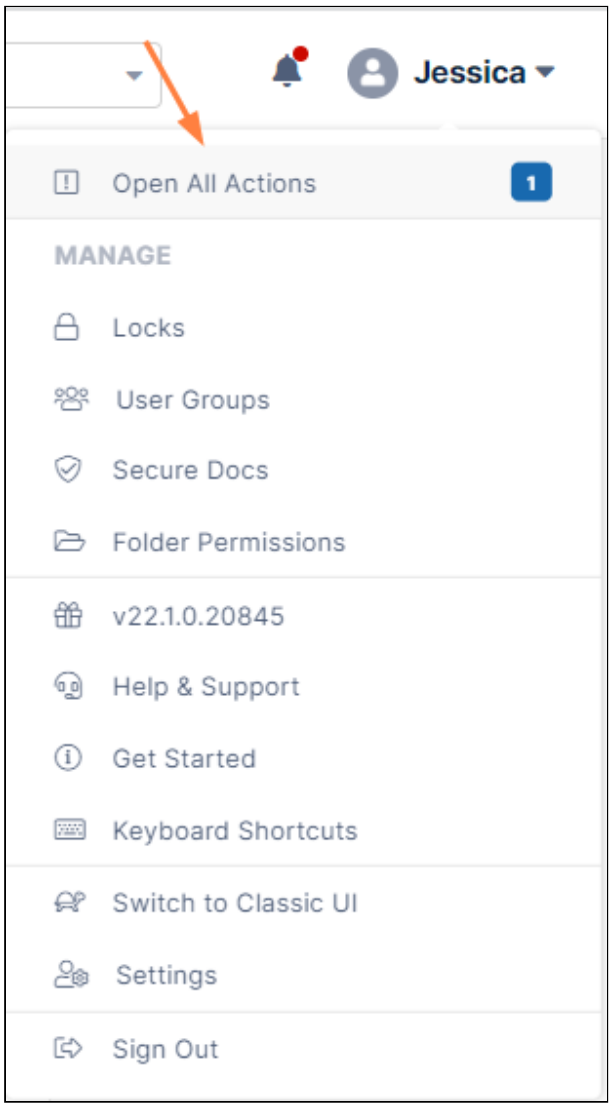
Movie URL not available.

To review a pending approval and approve or reject it:

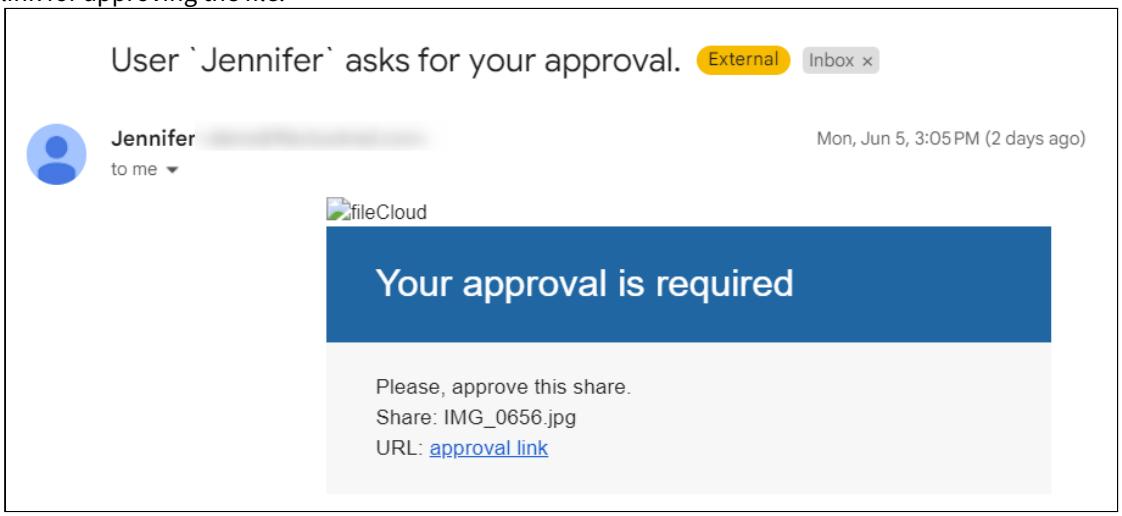
1. When you first log in, if the the screen indicates that you have pending actions, click the **pending actions** button to open a list of your pending actions.



You can also access your pending actions by clicking **Open All Actions** in the drop-down list under your username.

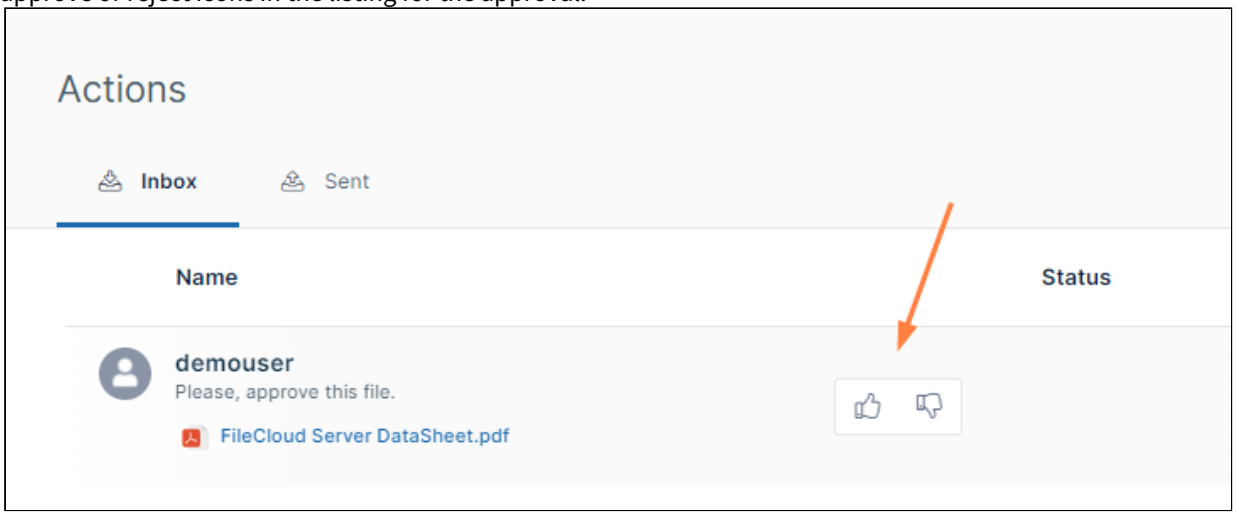

Jessica
Open All Actions
1
MANAGE
Locks
User Groups
Secure Docs
Folder Permissions
v22.1.0.20845
Help & Support
Get Started
Keyboard Shortcuts
Switch to Classic UI
Settings
Sign Out

In some FileCloud systems, when a file is sent for approval an email notification is sent to the approvers with a link for approving the file:



If you receive an approval email, you can click the approval link to directly open the detailed action page for the share.

2. In the list of pending actions, if you want to quickly approve or reject a file, hover over the listing, and click the approve or reject icons in the listing for the approval:



3. To review the details of the file, in the listing, click the username.
   A screen opens and displays file details as well as icons for approving or rejecting the file.
4. If the screen includes a preview file, as an approver, you may want to check the preview. If there is no preview file, you can download the file and review it.
5. To view any metadata included with the file, click the **Show Details** button.
6. If you want to enter a note to the user who sent the file for review, enter a note in **Comment**, and click **Add Comment**.
7. Once you have reviewed the file, approve it by clicking the thumbs up icon or reject it by clicking the thumbs down icon.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

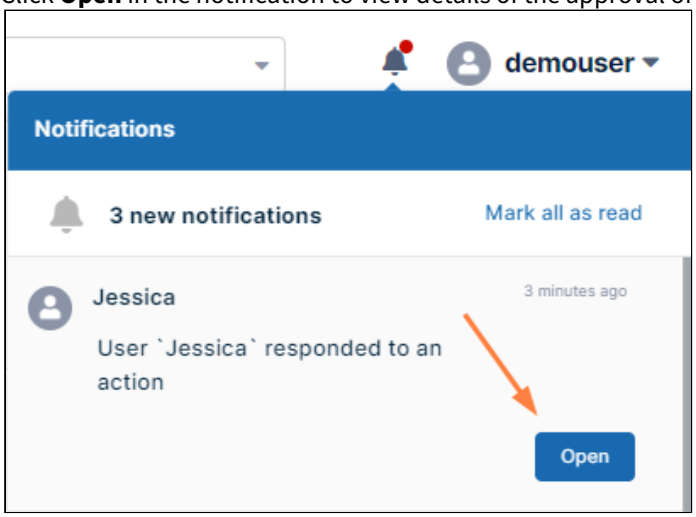
Movie URL not available.

Pending share approvals sent by Automated Workflows also appear in your inbox. For information about this type of share approval, see Share Approval Workflows.

To check the status of files you have sent for review.

When someone approves or rejects one of your files, you are notified in your FileCloud notifications.

1. Click **Open** in the notification to view details of the approval or rejection.



To see if the file has been approved or rejected and any comments the approver has made, click the username above the file.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Sharing Files and Folders

File and folder sharing allows you to provide public or private access to files stored in FileCloud Server with various levels of access privileges.

While files can easily be shared by emailing them, sharing files in FileCloud allows you to:

- Keep track of who you have shared a file or folder with
- Add comments about the file or folder
- Monitor file versions
- Control changes people make to a file or folder by setting a combination of permissions to read, view, modify, copy, or delete it
- Have an allocated amount of personal file storage in a common file system

You can share a file or folder publicly or privately.

Publicly

- Does not require the user you want to share with to have a FileCloud account.
- Lets you share a file with everyone with or without restrictions.
- Lets you share a file with everyone and require a password.

Privately

- Does require the user you want to share with to have a FileCloud account.
- Lets you invite someone to create a FileCloud account so you can share with them.
- Lets you share a file with specific FileCloud users with or without restrictions.

	Requires a FileCloud Account	**Set Permissions**	**Set Options**	**Share with Everyone**	**Share with a Specific User**
Public	✗ Anyone with the link can access	✓ View ✓ Download ✓ Upload	✓ Share Name ✓ Expiration ✓ Restrict Downloads ✓ Notifications ✓ Require Password	✓ Any user who has the share link can access the share.	✗ Once you select to share with specific users, the share becomes private.

Private	✅ Invite those without an account to create one	✅ View ✅ Download ✅ Share ✅ Upload ✅ Sync ✅ Delete ✅ Manage	✅ Share Name ✅ Expiration ✅ Notifications	❌ Add Groups to share with multiple users at once	✅ With a FileCloud account (you can invite users who do not have FileCloud accounts, but they must register for an account before viewing the share)

💡 Some permission options may vary depending on whether you share a file or a folder.

⚠ Prior to FileCloud version 19.1, users can click on the root folder, **My Files**, and select **Share**. This is a security threat and should not be allowed.
In FileCloud Server version 19.1 and later:
- When users click on the root folder, **My Files**, they no longer have the sharing option.

ⓘ Each user creates shares independently, so there may be different shares pointing to the same folder or file.

In this section:

- Sharing Files and Folders Publicly
- Sharing Files Privately
- Share a Folder Privately
- Share Options for Public and Private Folders
- Managing Shared Files and Folders
- Shares that Require Approval
- Using the Secure Web Viewer

Sharing Files and Folders Publicly

⚠ Beginning with FileCloud 23.1, users creating a share can download a QR code with the share link.

You can share a file or folder publicly so that anyone can access it even if they don't have a FileCloud account.

- If you want more security but still want a large number of people to access the file or folder, you can enable password protection.
- For additional security, and if you only want a small number of people to access the file, you can choose to share the file or folder privately.
- Users who access the share can **view**, **download**, and **upload** the share.

- Users can view the share by clicking the share link they receive or opening **Shared With Me** and clicking the Preview icon for the file.

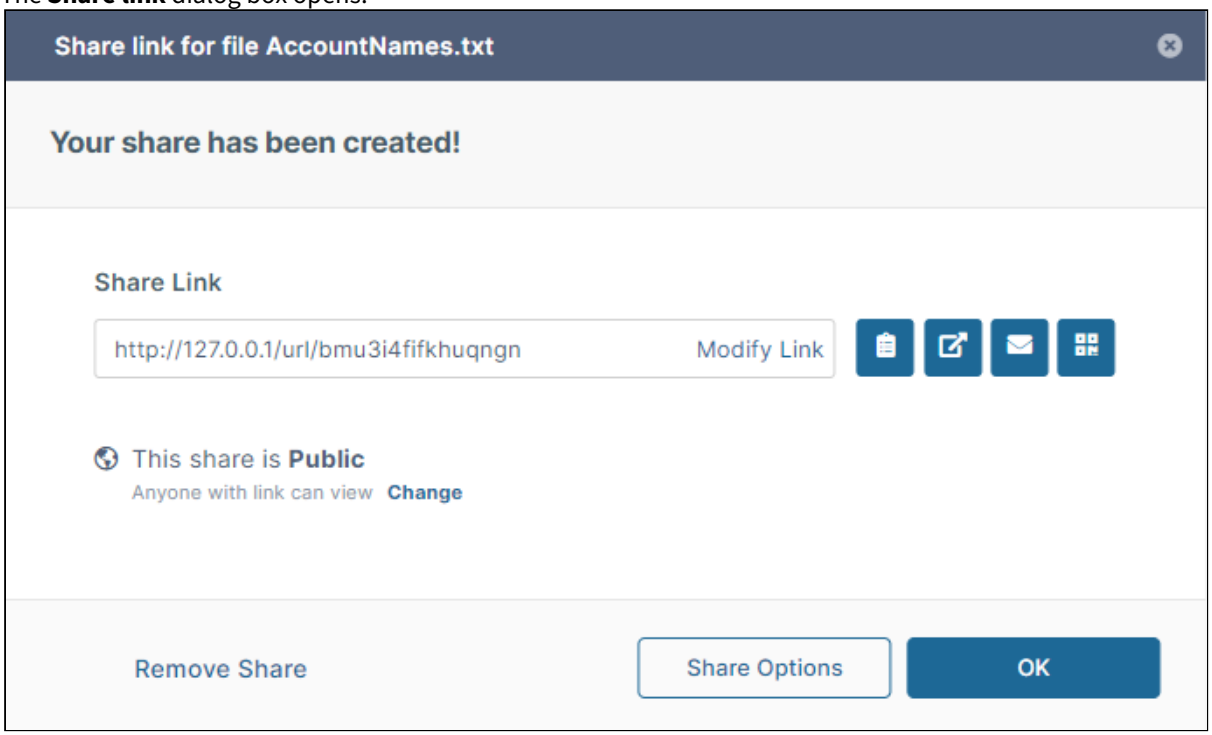
When you share a file or folder:

- A **Share Link** window opens to provide the link; the share has already been created.
- By default the share can be accessed by external users.
- You can click **Share Options** to set sharing restrictions.
- You can edit and send an email inviting new or existing users to access the share.

To share a file or folder publicly

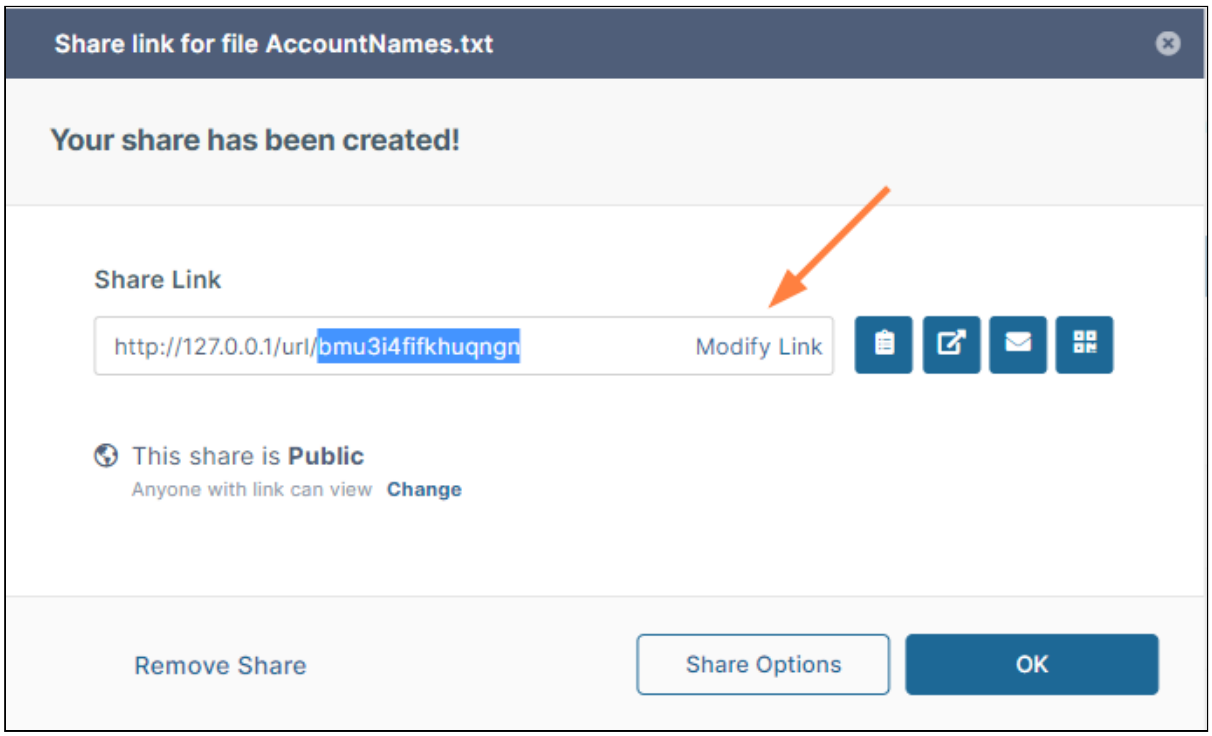
1. In the user portal, hover over the file or folder and click the **Share** icon.

The **Share link** dialog box opens.



Note: The dialog box may vary in appearance depending on the defaults set in your system.

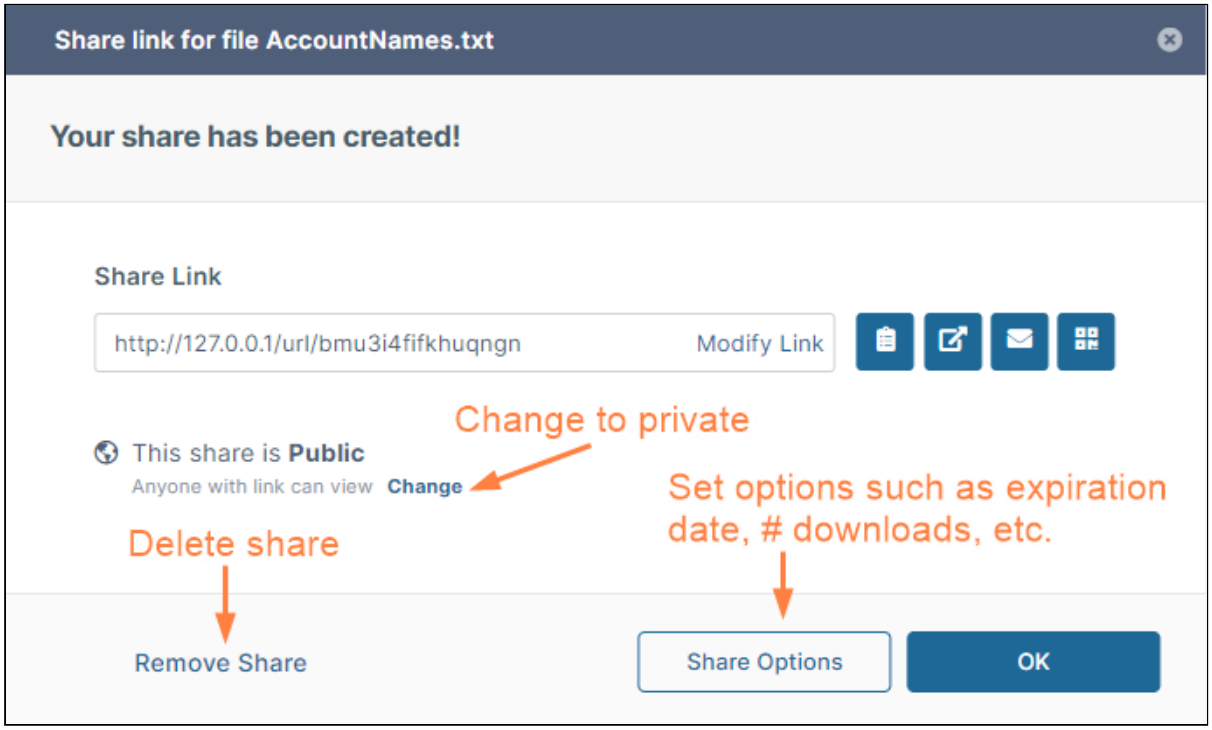
2. Beside the link, click **Modify Link** to change the name of the link. Write over the highlighted portion of the link. This is useful if you want to give the link a descriptive or memorable name.



3. To the right of the link, click one of the icons to:
   - copy the link so that you can paste it into a message or file and send it to a user.
   - open the link in a new window.
   - email the link to a user. See To email a public share, below.
   - download the QR code, which links the user to the share.

4. Click **Change** to change the share from **Public** to **Private**. See Sharing Files Privately.
5. Click **Share Options** to set options such as email notifications and an expiration date.

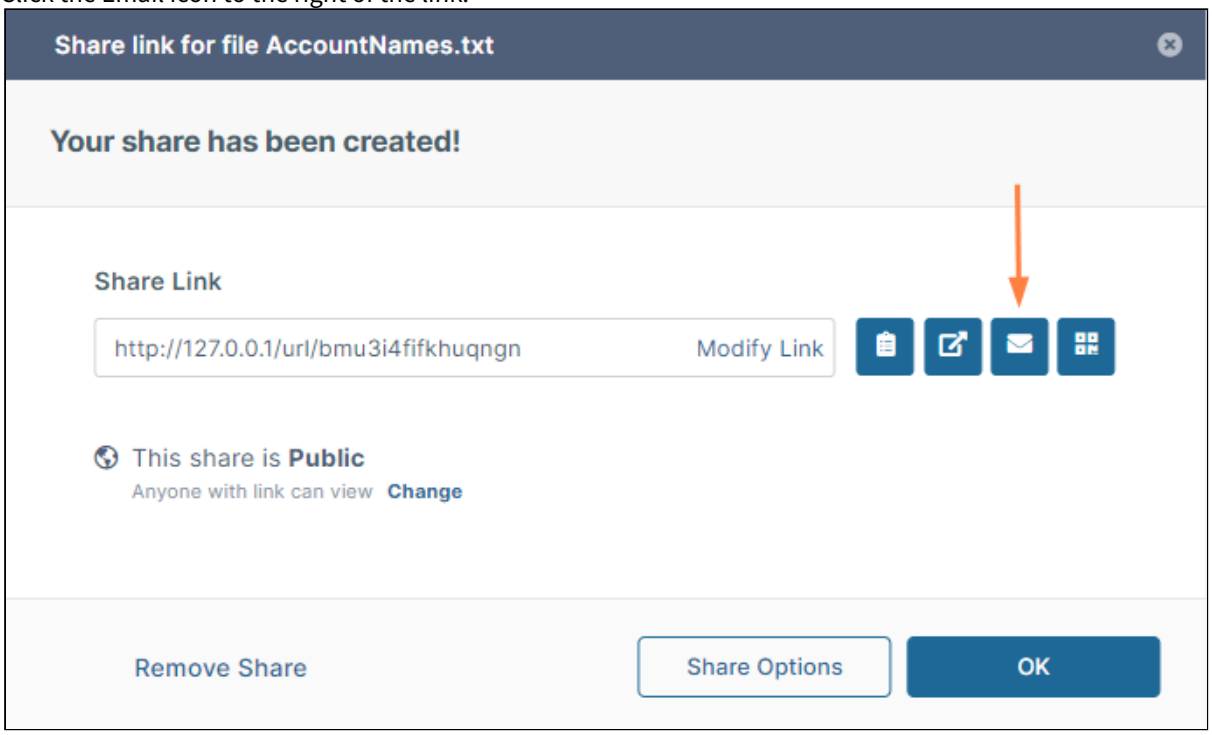
6. Click **Remove Share** to delete the share.



7. Click **OK** to save any changes you have made and close the dialog box.

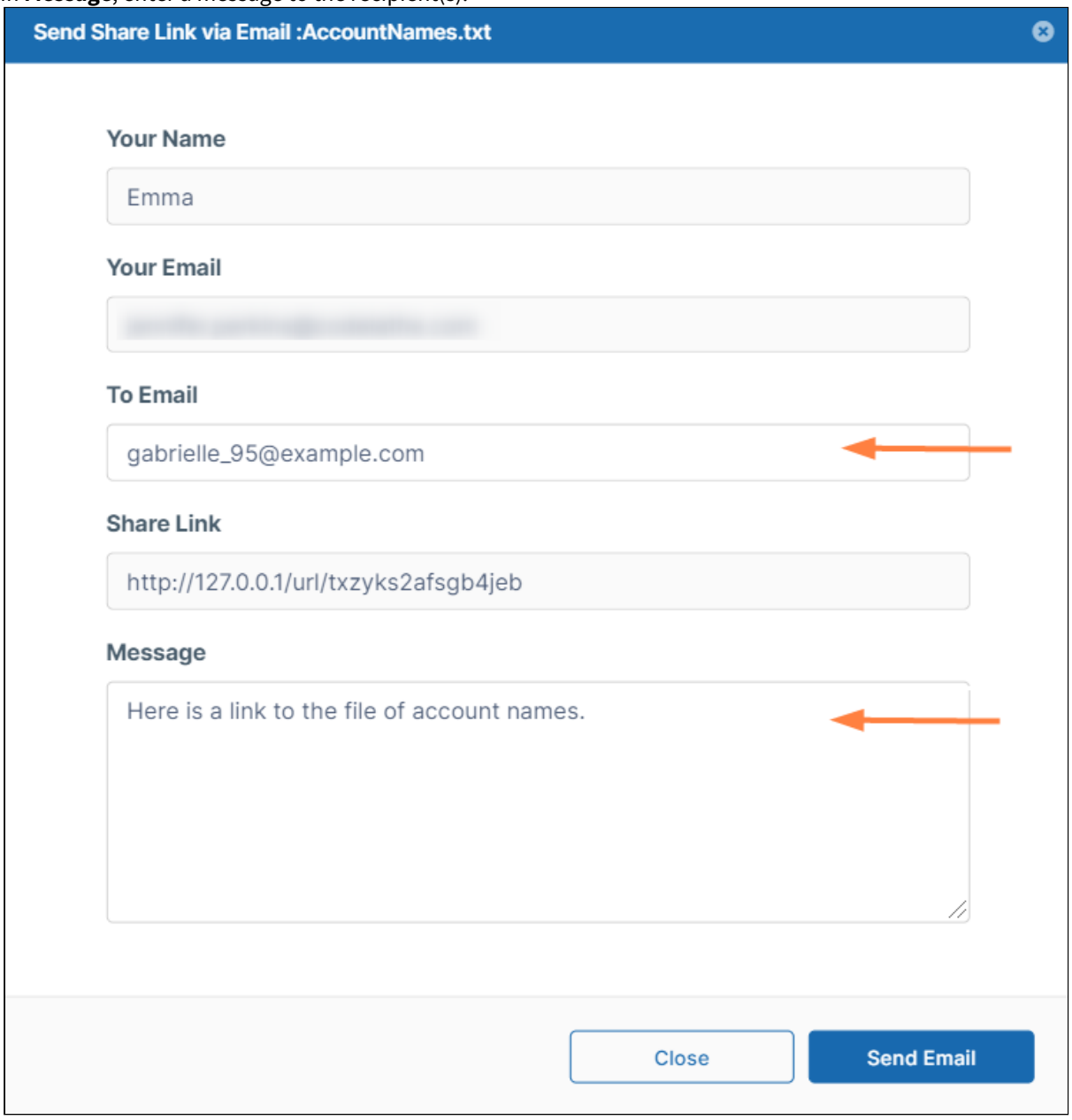
To email a public share link

1. Click the Email icon to the right of the link.



   A **Send Share Link via Email** dialog box opens.
2. In **To Email**, enter one or more emails to send the link to.

3. In **Message**, enter a message to the recipient(s).

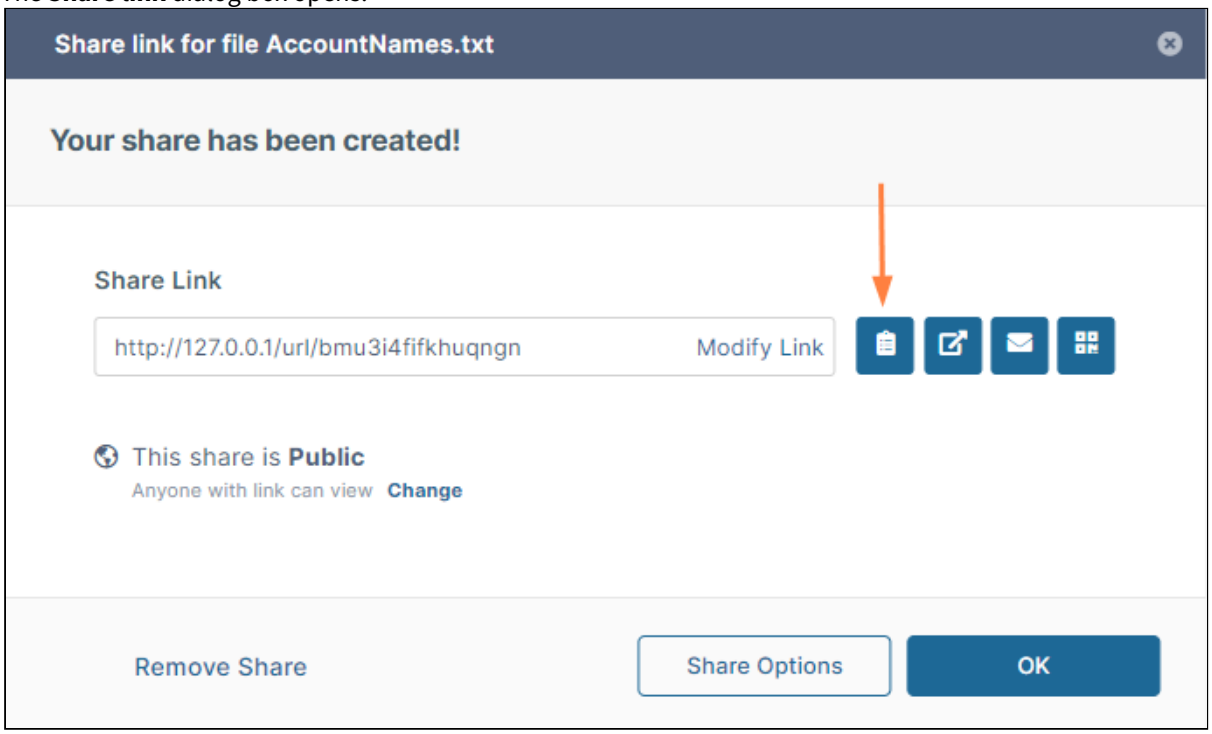


4. Click **Send Email**.

To copy and paste a public share link

If you want to include a share link in a file or post it to a site, you can use the **Copy Link to Clipboard** button.

1. In the user portal, hover over the file or folder and click the **Share** icon.
   The **Share link** dialog box opens.

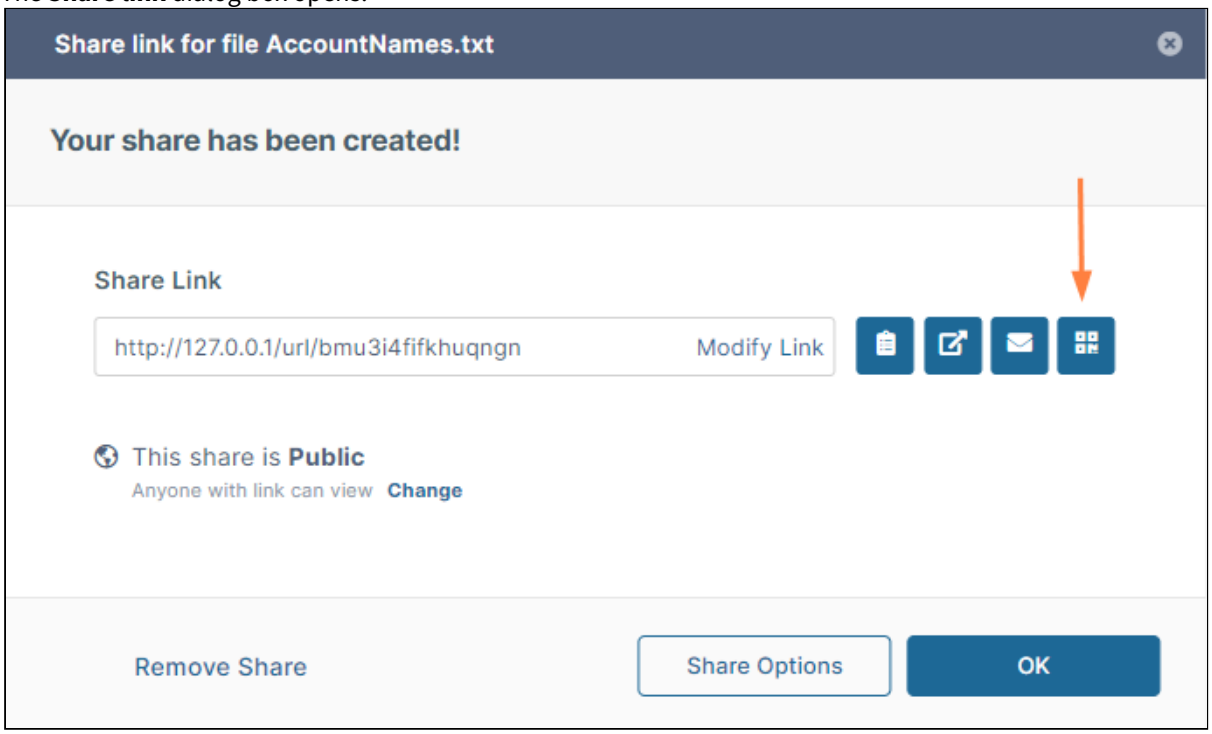


2. Click the **Copy Link to Clipboard** button.
   Now you can paste the link into a file or onto a site.

To download the QR code:

You can download a QR code that links to the share, and then include it in a text or email that you send to a share recipient. The share recipient can then scan the code to be redirected to the share.

1. In the user portal, hover over the file or folder and click the **Share** icon.
   The **Share link** dialog box opens.



2. Click the **Download QR Code** button.
   The code is downloaded as a .png file that you can copy into an email or text. The recipient can scan the code to open the share.

Also see:

- Public Share Options for Files
- Public Share Permissions for Folders
- Video of Sharing a file with everyone
- Set Share Preview for Public Folder Shares

Public Share Options for Files

⚠ Beginning with FileCloud 23.232, the sharing permission **Allow anyone with Secure Web Viewer link and a password** is available for users whose system has Secure Web Viewer capability.
Beginning with FileCloud 23.1, when users create a public file share, they can choose **View + Download** or **View Only** sharing permissions.

In the User Portal, you can configure how you share a public file when:

- You first create the share using **Share Options** - this button is available in the window that opens after you hover over a file and click the Share icon.

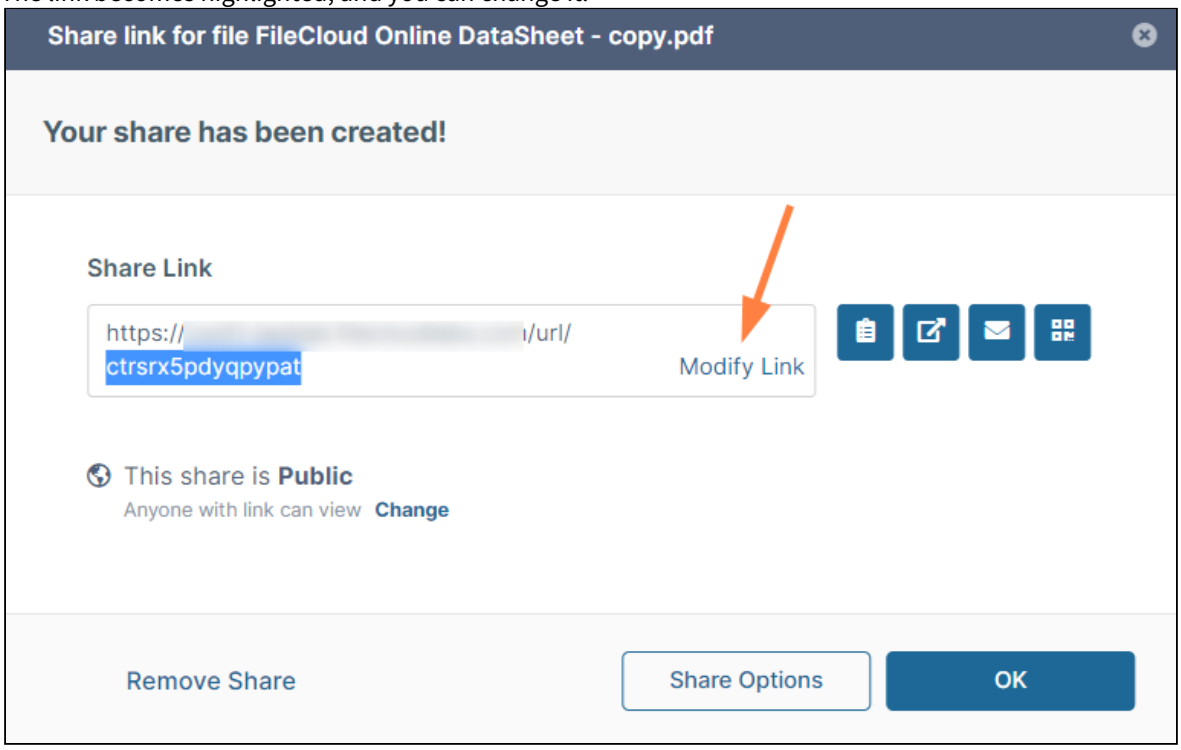
- After you create the share by opening it. The share opens to a window that displays the options.

Share options include:

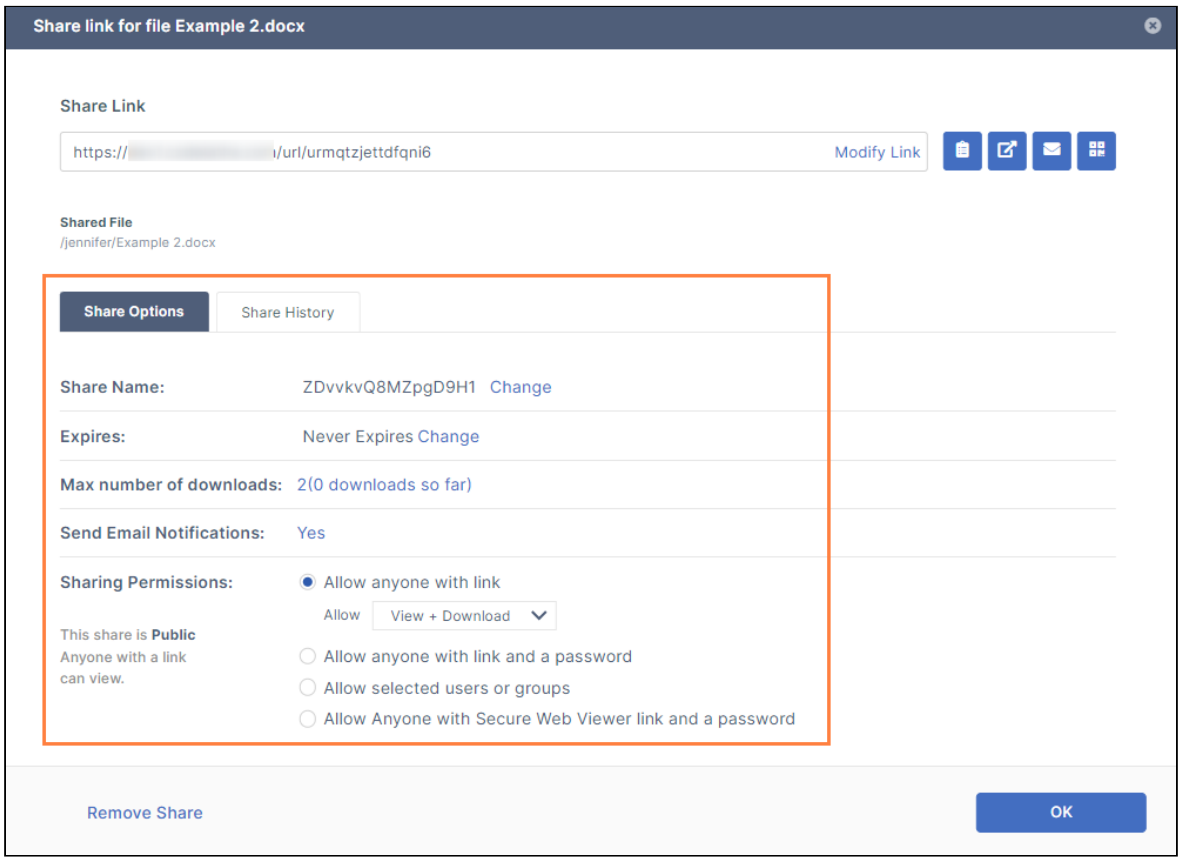
- Entering a custom share link or share name
- Setting a share expiration date
- Setting a maximum number of times the share can be downloaded
- Disabling email notifications when a change is made to the share
- Requiring a password to access the share
- Viewing permissions

To configure the share link and share options

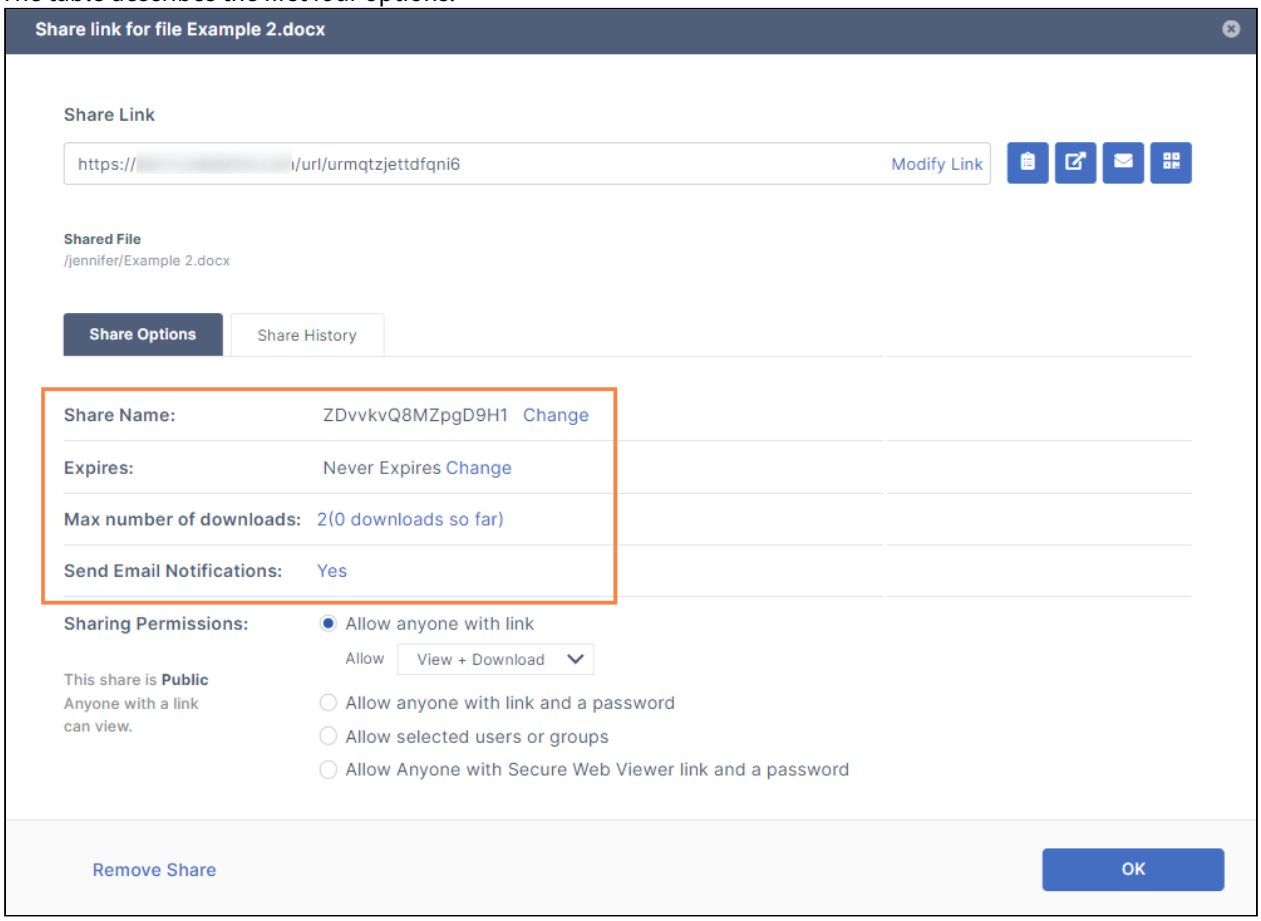
1. Hover over the file and click the **Share** icon.
   - If the file is not yet being shared, the **Share Link** dialog box opens.
     If you want to change the link name to something more memorable or descriptive, click **Modify Link**.
     The link becomes highlighted, and you can change it.



   - Click **Share Options** to expand the the dialog box and display share options. (If the file has already been shared, the expanded dialog box opens immediately.)


Share link for file Example 2.docx
Share Link
https://[redacted]/url/urmqtzjettdfqni6
Modify Link
Shared File
/jennifer/Example 2.docx
Share Options
Share History
Share Name:
ZDvvkvQ8MZpgD9H1 Change
Expires:
Never Expires Change
Max number of downloads:
2(0 downloads so far)
Send Email Notifications:
Yes
Sharing Permissions:
Allow anyone with link
Allow
View + Download
This share is Public
Anyone with a link
can view.
Allow anyone with link and a password
Allow selected users or groups
Allow Anyone with Secure Web Viewer link and a password
Remove Share
OK

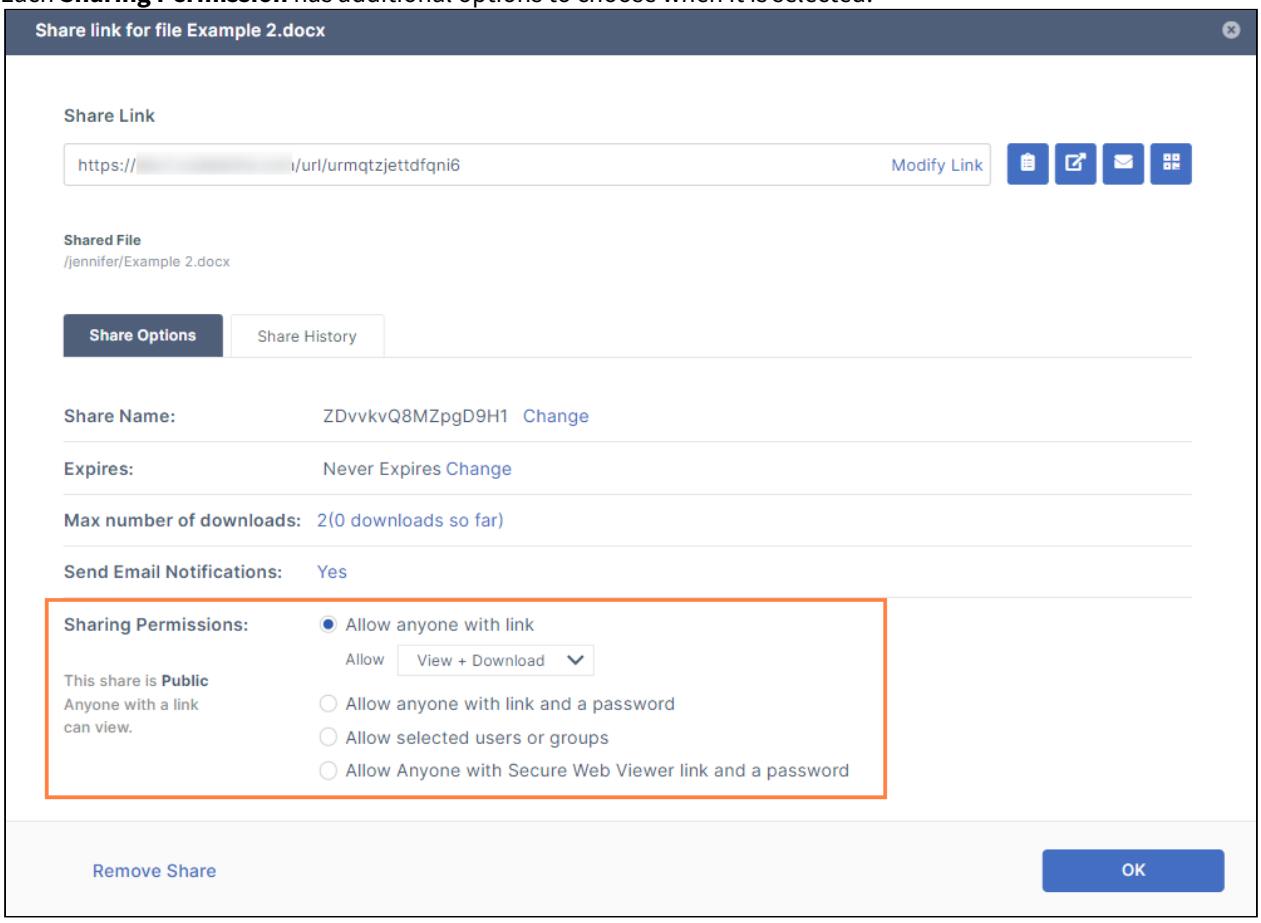
2. The table describes the first four options:

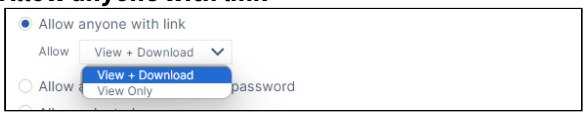
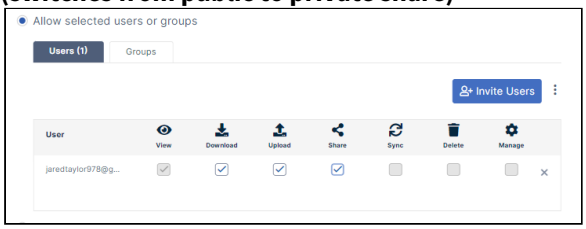


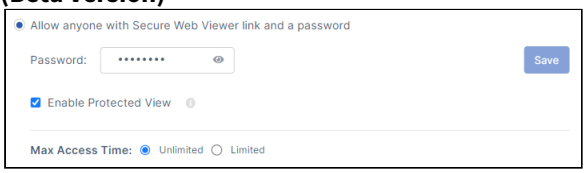
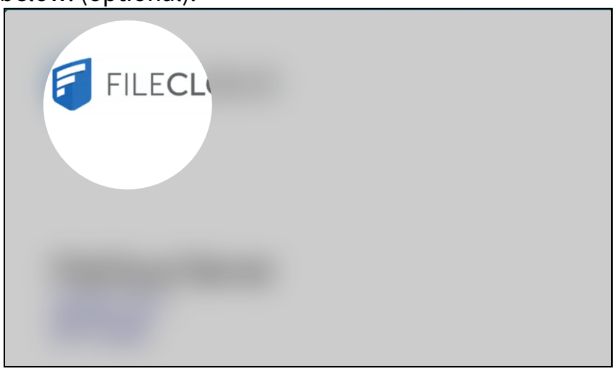
Option	Settings	Description
Share name	• randomly-generated name (default) • custom name	Customize the share name if you want it to be descriptive or memorable.
Expires	• Never (default) • Expires	By default, this is set to **Never**. If you set this to **Expires**, enter a date in the future when this file is no longer shared. When the share expires, the link becomes unusable to users but the file is not removed or changed.

Option	Settings	Description
Max number of downloads	• No Restrictions (default) • number	Use this to prevent excessive distribution of the file. • **No Restrictions** - allows any user to download a file an unlimited number of times. Appears as the number 0. This is the default setting. • number - specifies the number of times the file may be downloaded.
Send Email Notifications	• Yes (default) • No	By default, this is set to **Yes**. • If set to **Yes**, then an email notification is sent when a file is opened or downloaded for a public share.

3. Each **Sharing Permission** has additional options to choose when it is selected.



Sharing Permission and Options	Description
Allow anyone with link 	Choose **View + Download** or **View Only** to specify users' permissions on the share. Then send the share link to specific users or groups to give them access to the share.
Allow anyone with link and a password 	Choose **View + Download** or **View Only** to specify users' permissions on the share. Click in the password field to change it and then click **Save**. (optional) Click the share icon to copy the share link and password. (optional) Send the share link to specific users or groups to give them access to the share.
Allow selected users or groups (switches from public to private share) 	Invite users or groups to the share and check any of the available permissions. For more details see Private Share Options for Files.

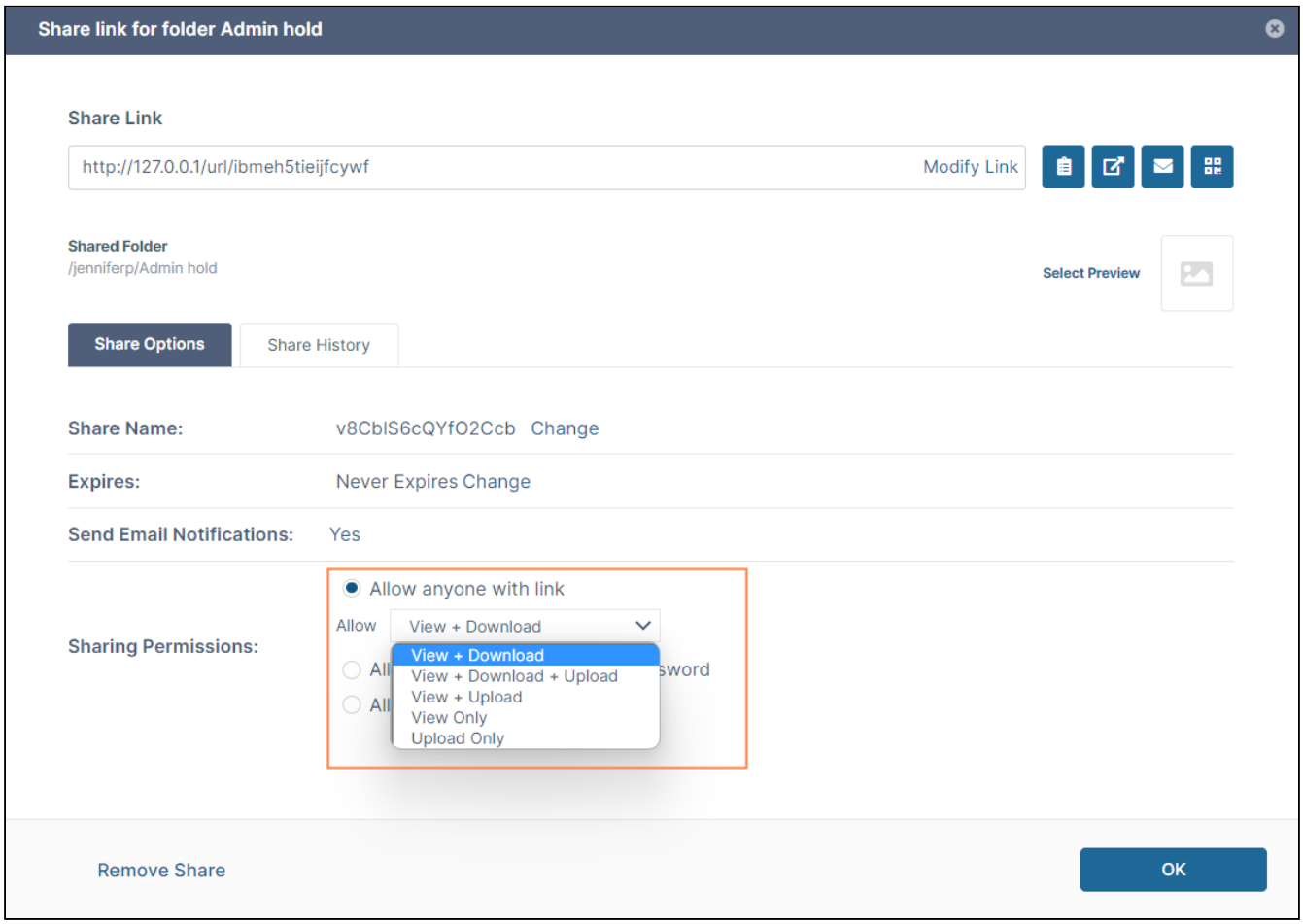
Sharing Permission and Options	Description
Allow anyone with Secure Web Viewer link and a password (Beta version) 	**Notes**: • This option is only appears if your admin has enabled it. • This option appears disabled for files of types other than jpg, png, pdf, docx, and pptx, and for files greater than 20 MB. This option requires share recipients to view the share through the Secure Web Viewer. Click in the **Password** field to change the password, and click **Save**. (optional) Check **Enable Protected View** to require share recipients to view small portions of the share at a time through a draggable lens, as shown in the image below. (optional). 

4. To save your changes, click **OK**.

Public Share Permissions for Folders

When you share a folder publicly, by default, users have permission to view and download the folder. You can add additional permissions for each user.

On the **Share Link** dialog box, in the **Sharing Permissions** section, if you choose **Allow anyone with link** or **Allow anyone with link and a password** you can choose from several permissions options:

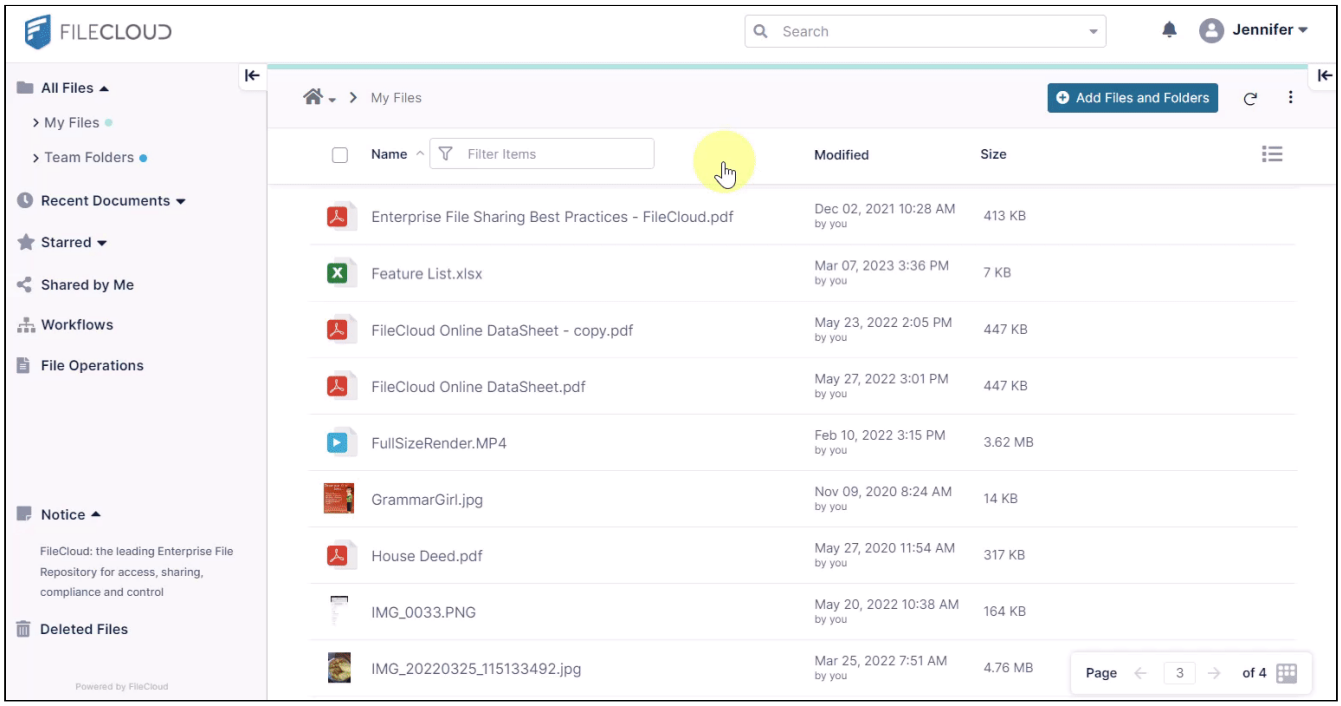


The following table includes definitions of each permission.

Permission	Description
View	Every user with access to the share has view access. View access allows users to view or browse files in the folder.
Download	Download permission allows a user to save a file in the folder to their desktop or client.
Upload	Upload permission enables a user to save content to the shared folder.

Video of Sharing a file with everyone

You can share a file without any restrictions. That means that anyone who has the link can access the file even if they do not have an account in your FileCloud system.



Set Share Preview for Public Folder Shares

The ability to select a file as the default preview when sharing a folder publicly is available in the current FileCloud user interface beginning in version 21.1.

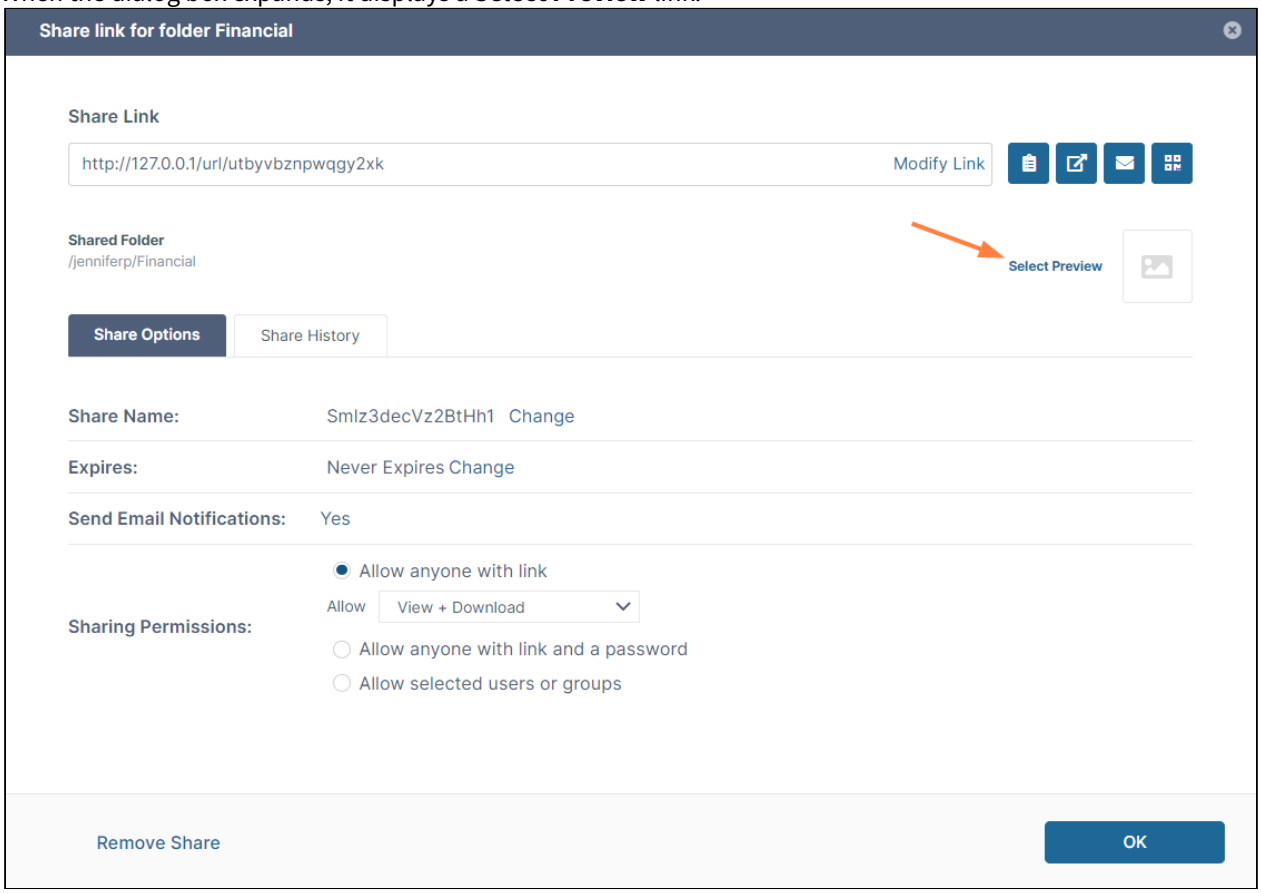
Share recipients are shown the preview when they view the share.

> Note to admins: If an Office file is chosen as the preview file, it will not appear when the folder is previewed unless Document Converter is enabled.

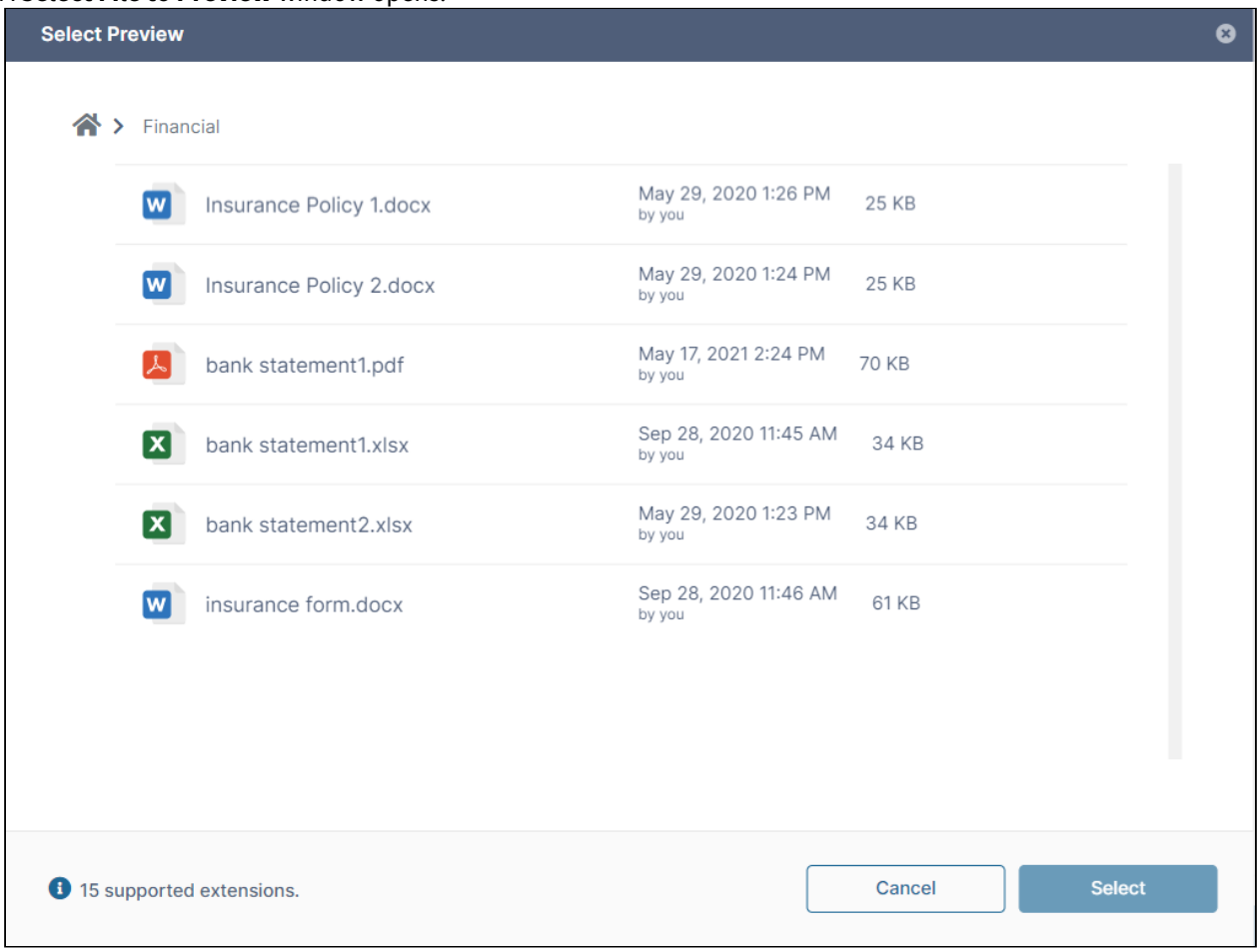
To select the preview file:

1. Share the folder.

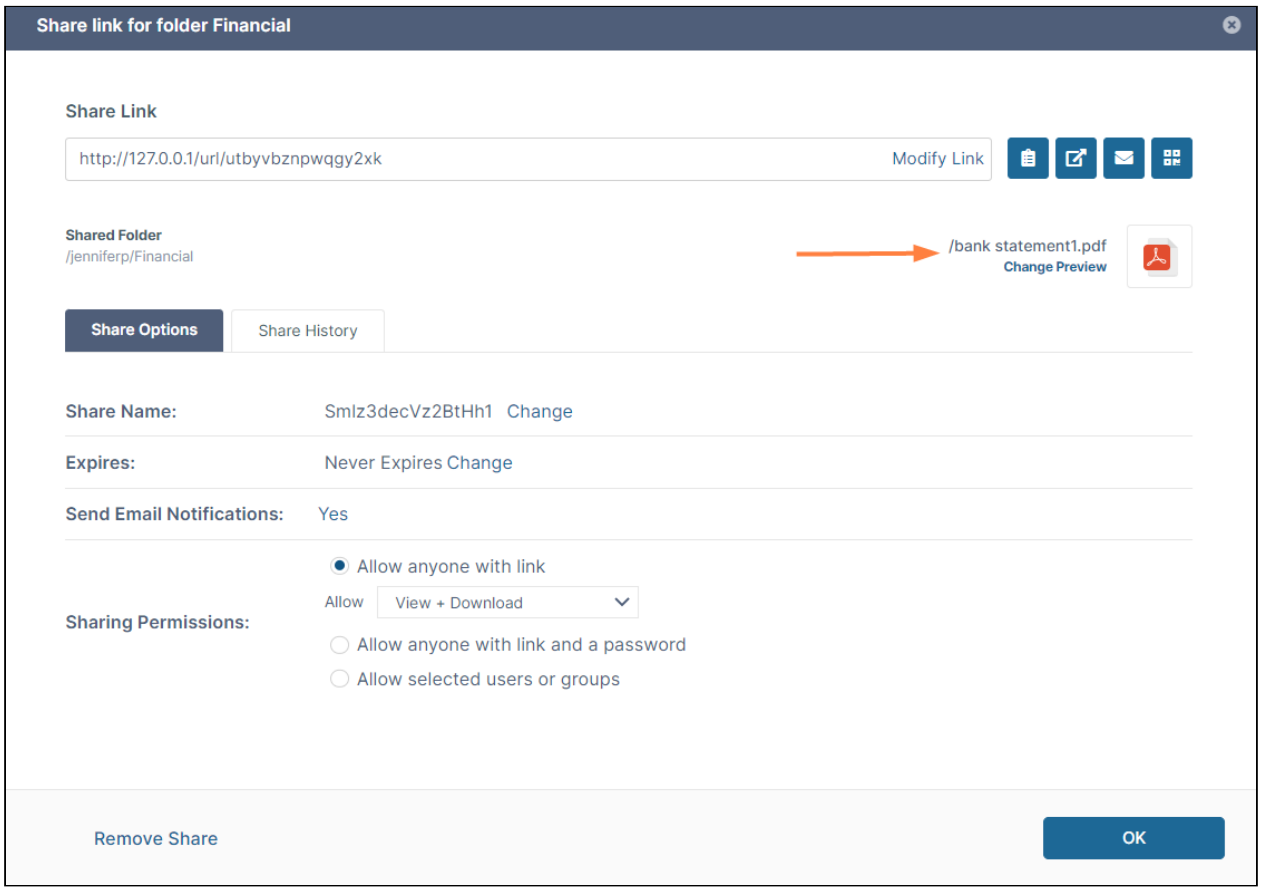
2. In the **Share link for folder** dialog box, click **Share Options**.
   When the dialog box expands, it displays a **Select Preview** link.



3. Click the **Select Preview** link.
   A **Select File to Preview** window opens.

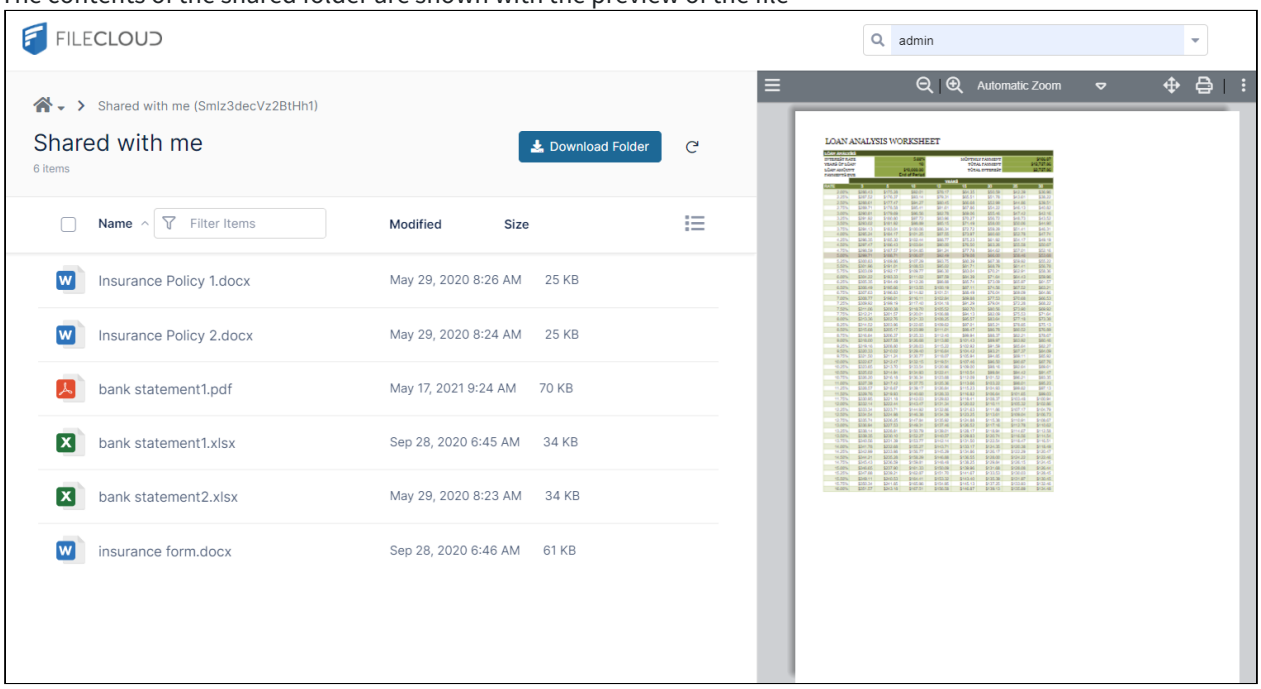


4. Check the preview file, and click **Select**.
   The window closes and the **Share link for folder** dialog box displays the name and filetype icon for the file.



5. If you want to see what the preview looks like to someone viewing the share, click (Open link in new window) in the upper-right corner of the dialog box.

The contents of the shared folder are shown with the preview of the file



Sharing Files Privately

- Sharing privately provides more security than sharing publicly.
- It is useful when you only have a small number of people you want to share with.
- You are able to look up existing FileCloud users' email addresses, and then send them an email with a link to the share.
- You can send a share link to a user without a FileCloud account and invite the user to create an account to access the share. See Sharing Files Privately with New Users.
- You can copy and paste share recipients from one private share to another.

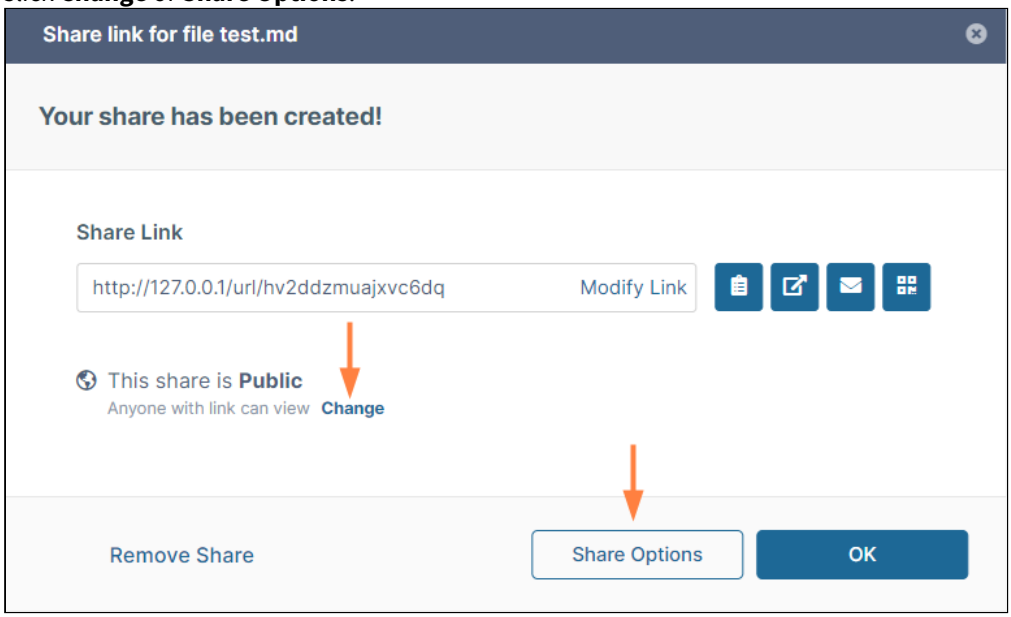
When you share a file privately, users are required to log in with their FileCloud accounts to access the file on the User Portal.

To share a file privately

1. In the user portal, hover over the file and click the **Share** icon.

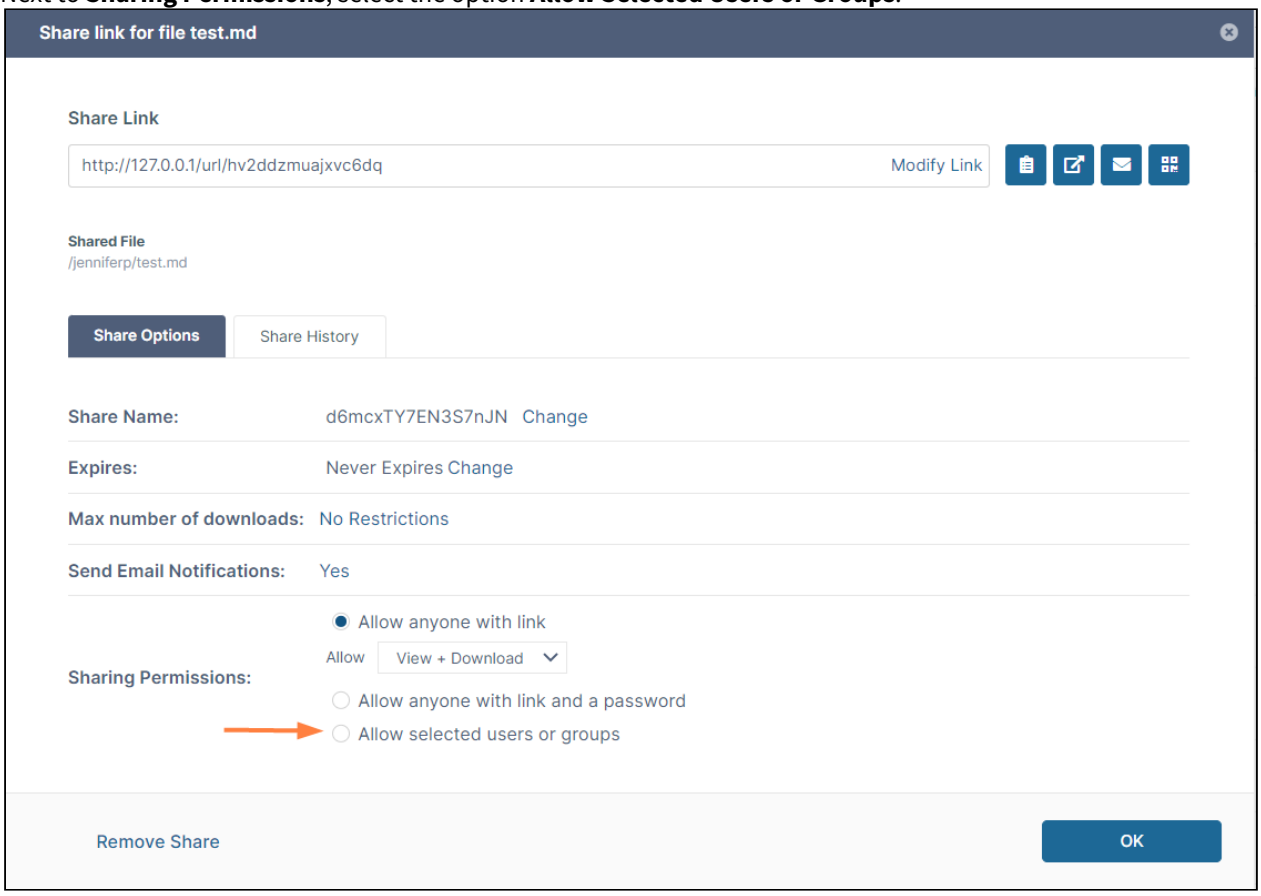
The **Share link** dialog box opens.
At this point, the share is public.

2. Click **Change** or **Share Options**.



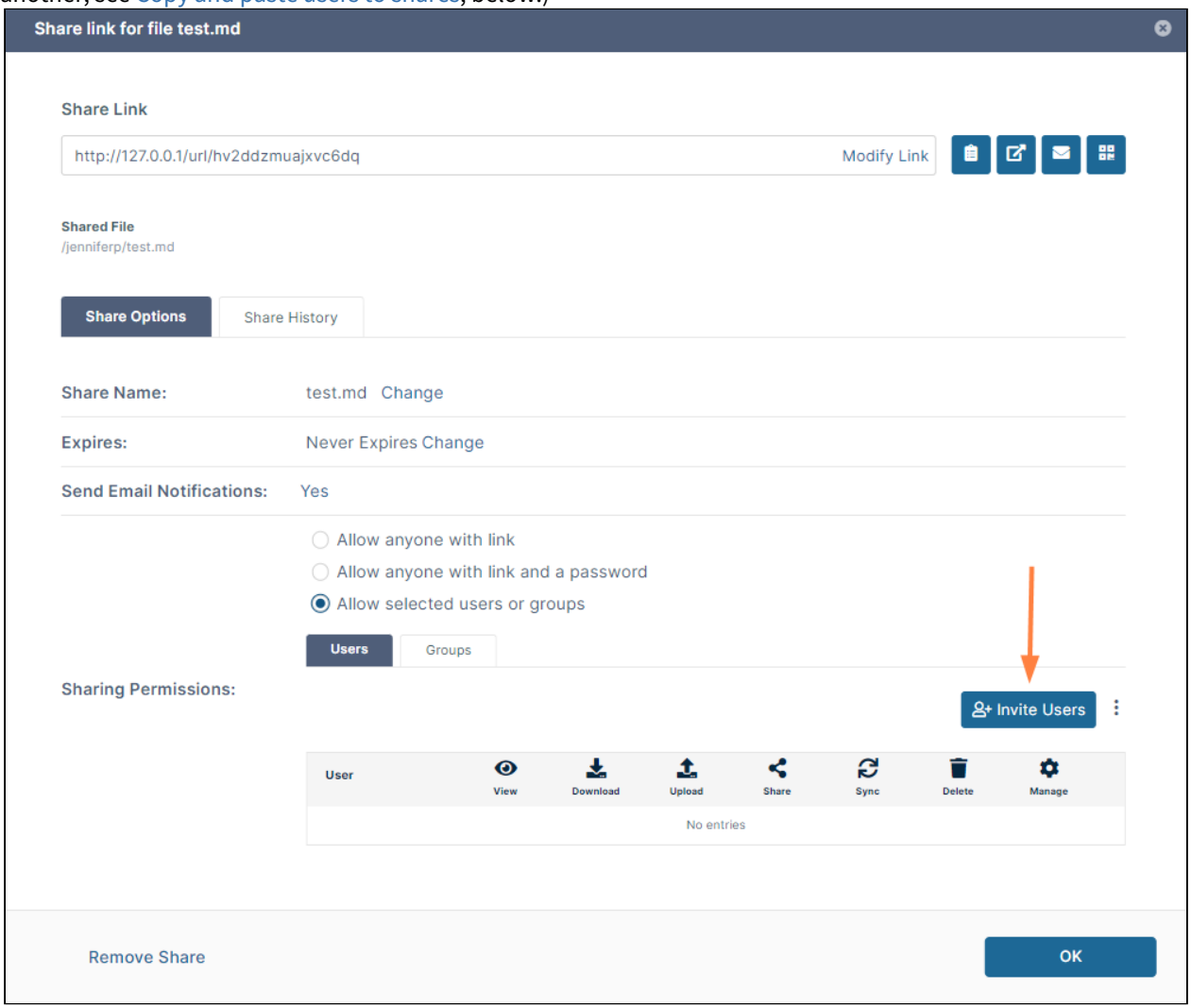
The Share link dialog box expands.

3. Next to **Sharing Permissions**, select the option **Allow Selected Users or Groups**.



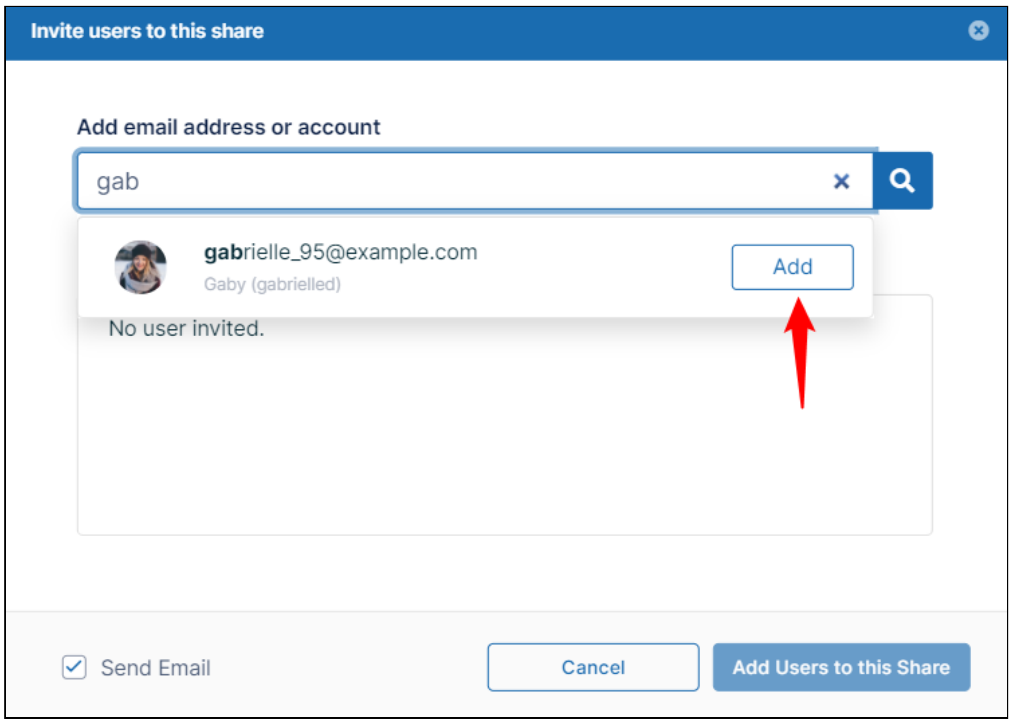
A section with **User and Groups** tabs opens.
Notice that the **Max number of downloads** option disappears. It is not valid for private shares.

4. To configure the **Share Options**, see Private Share Options for Files.
5. On the **Users** tab, click **Invite Users** to add individual users to the share. (To copy users from one share to another, see Copy and paste users to shares, below.)

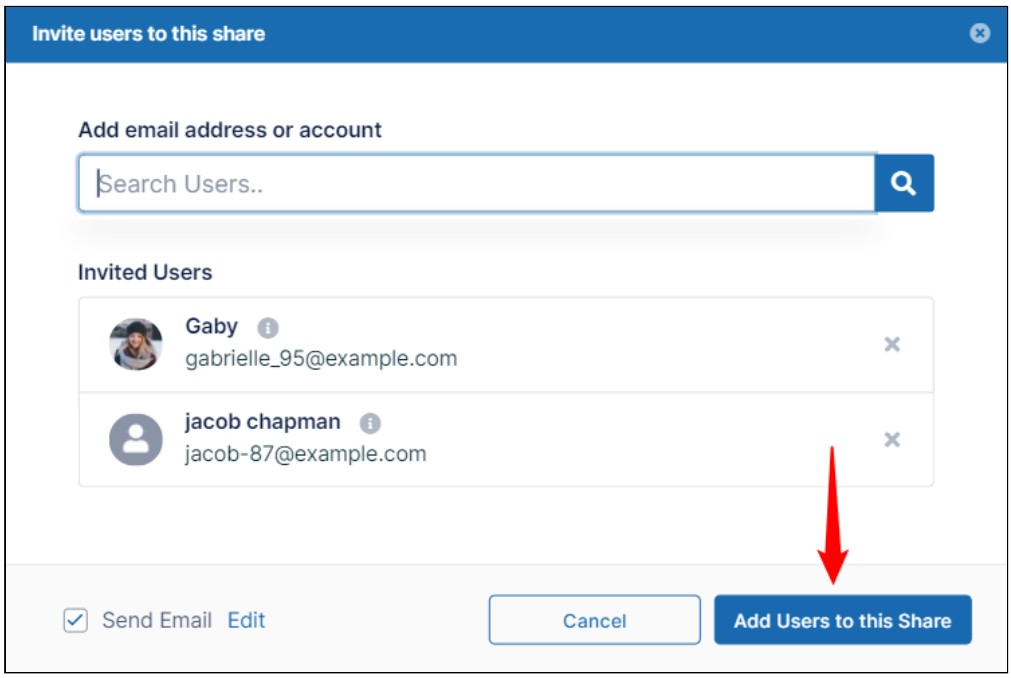


An **Invite users to this share** dialog box opens.

6. In **Add email address or account**, begin to enter the user name or email address of a user with a FileCloud account.
Any matching users appear.

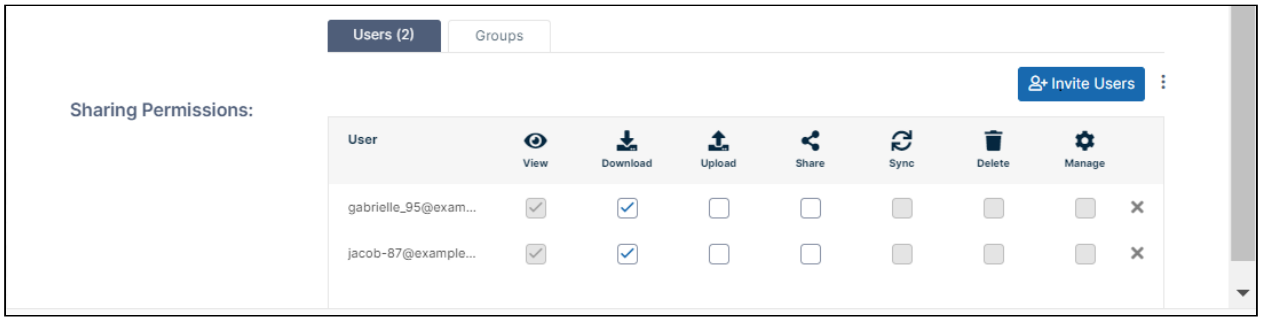


7. Click **Add** to add the user to the **Invited Users** dialog box.
8. Add any number of users to the share.
   You may also add users who do not have existing FileCloud accounts. See Sharing Files Privately with New Users for help.
9. **Send Email** is checked by default. To edit the email you are sending, or to not send email, see Sending an Email Notification for a Private Share, below.
10. When you are done adding users, click **Add Users to this Share**.
    An **Invite Users to this Share** dialog box opens.

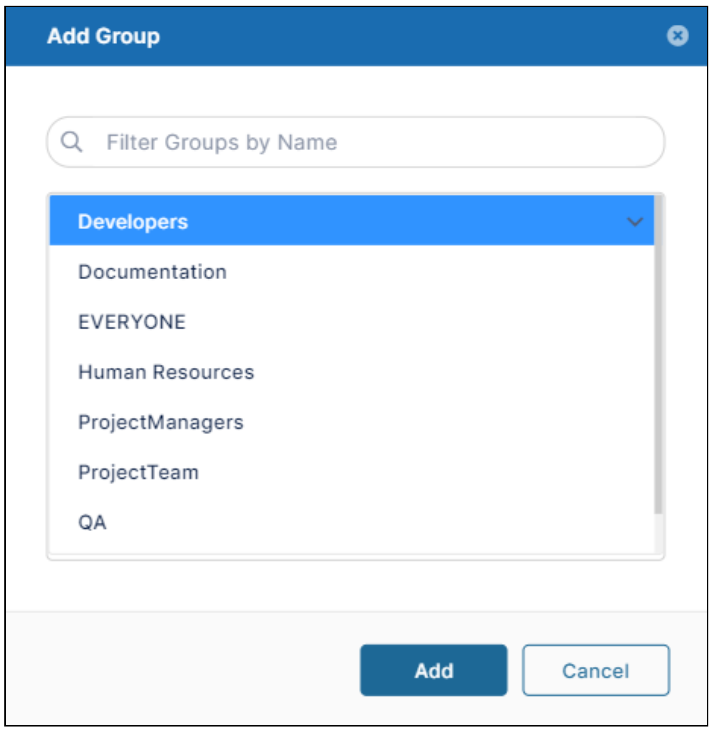


The **Invite users to this share** dialog box closes, and the users appear under **Sharing Permissions**.

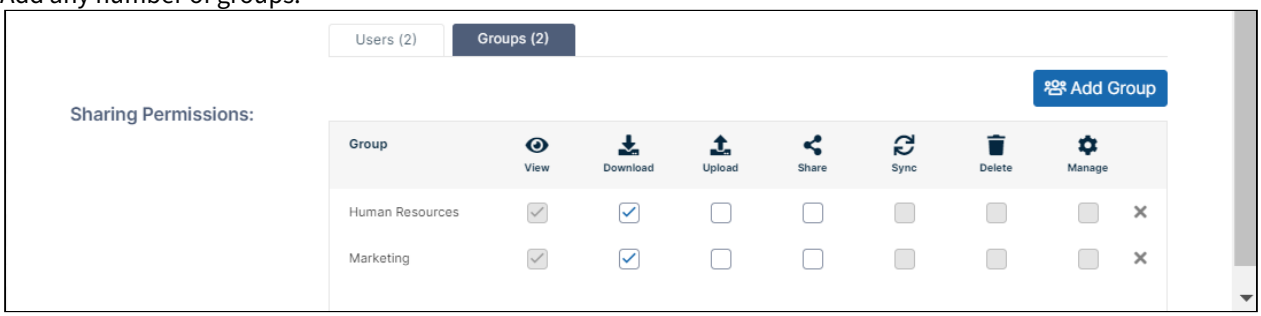
11. Check and uncheck the sharing permissions buttons for each user to change the actions they can perform on the share.
    By default, only **View**, **Download**, **Upload** and **Share** permissions are available on private shares. You cannot remove **View** permission because that would remove the share; however, if you want to remove the share, click **x** at the end of the row.



12. Click the **Groups** tab and then click **Add Groups** to add FileCloud groups to the share.
    An **Add Group** dialog box opens.



13. Select a group and click **Add**.
14. Add any number of groups.



15. Modify the actions each group can perform on shares.
16. Click **OK** to save your changes to the private share.

Note: If you add a user as a share recipient, and also add a group that includes the user as a share recipient, the user's share permissions are used and the group permissions are ignored for the user. The group permissions apply to users in the group who are not added individually as share recipients.

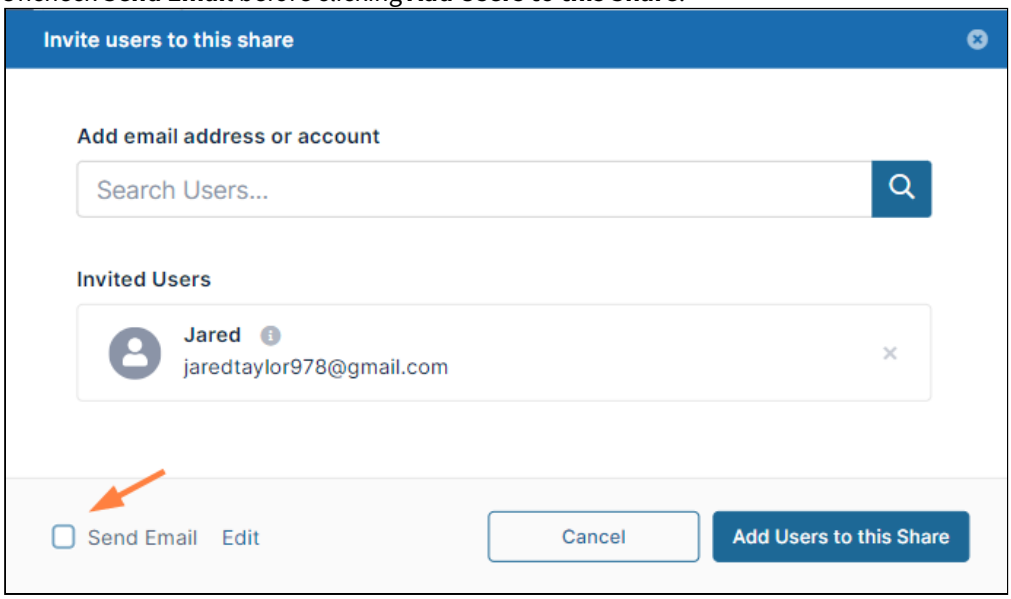
Sending an Email Notification for a Private Share

By default, when you are adding a user to a private share, the **Send Email** box in the **Invite users to this share** dialog box is checked.

If you leave the box checked, an email with the share link is sent to users added to the share.

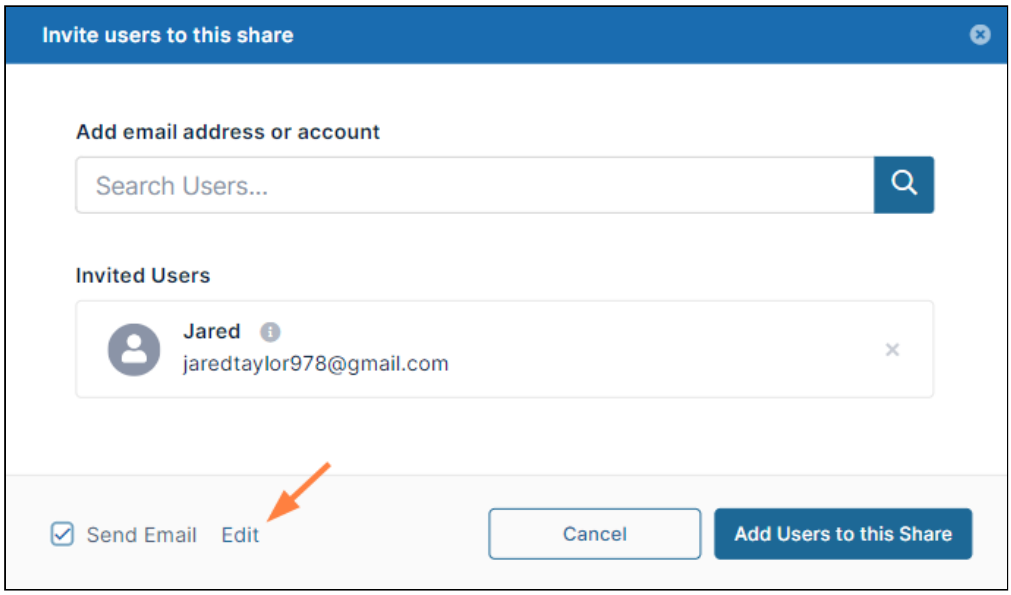
To not send the email to share members:

1. Uncheck **Send Email** before clicking **Add Users to this Share**.

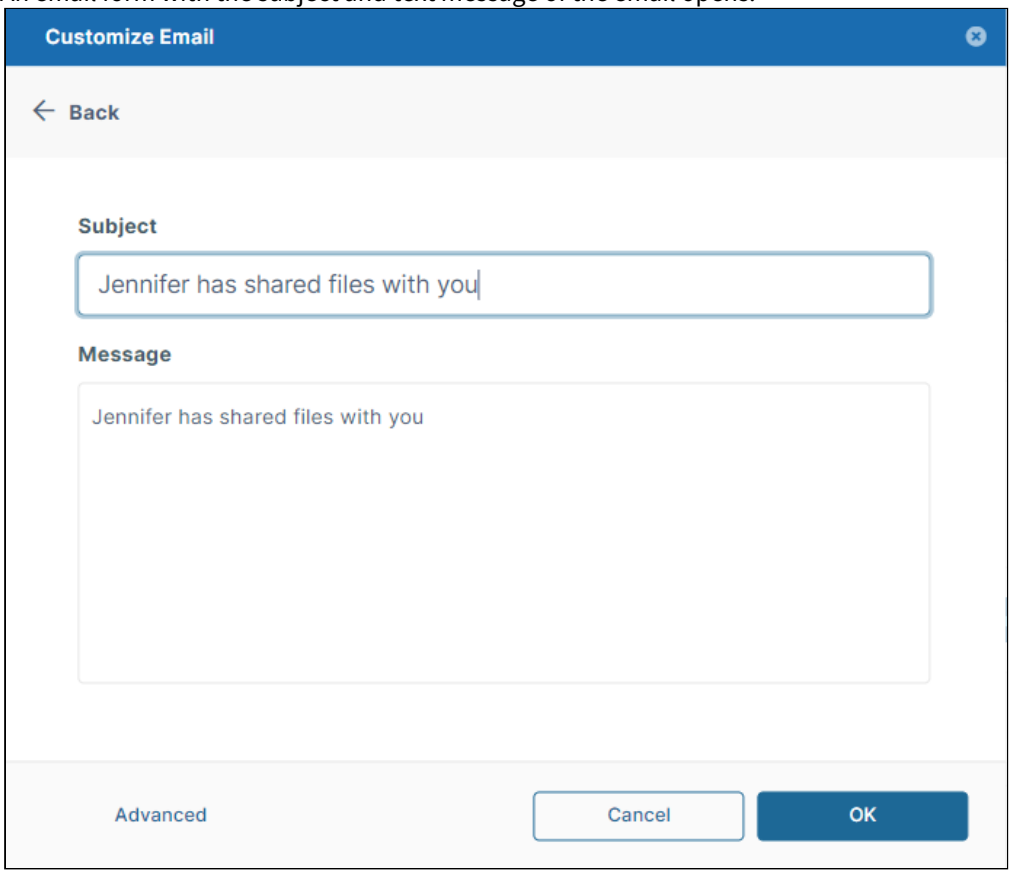


To customize the email content

1. Leave **Send Email** checked and click **Edit**.

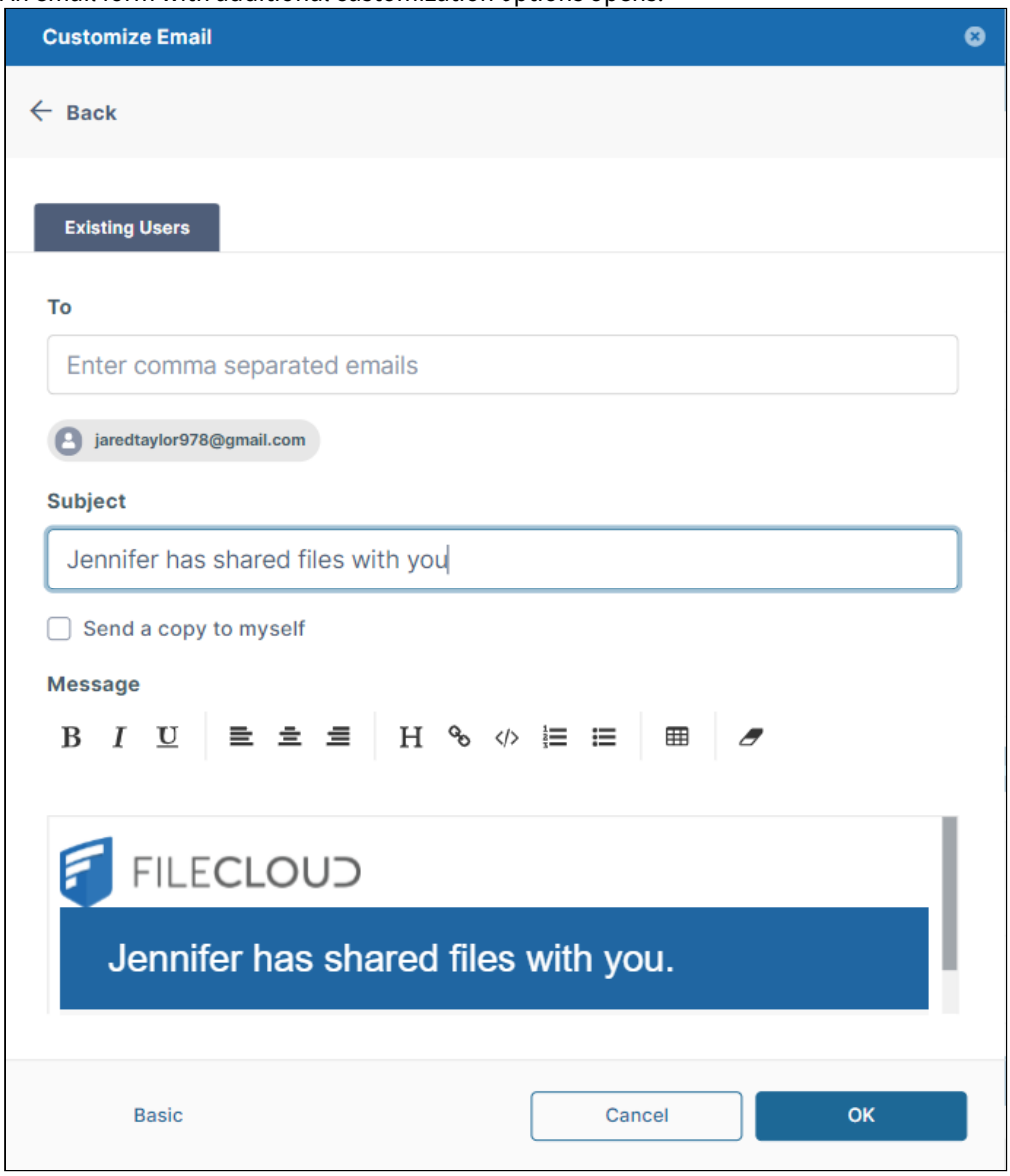


An email form with the subject and text message of the email opens.



2. If you want to change the subject or text of the message, change it here, and click **OK**.

3. If you want to add additional recipients, change the format of the email, or remove the link, click **Advanced**. An email form with additional customization options opens.



4. Make any changes, and click **OK**.

Copy and paste users to shares

If you are creating multiple private shares with the same users, you can copy the users from one share and paste them into the others.

After you have added users to a private share, you can copy the users and then paste them into another share.

To copy and paste users in shares:

1. Create a private share, and add users to it.
2. Click the icon that appears to the right of the **Invite Users** button, and then click **Copy Users**.

3. Create another private share.
4. To add the same users, click the icon to the right of the **Invite Users** button, and then click **Paste Users**.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

During the session, you can continue to paste the same users until you copy a new set of users.

Also see:

- Private Share Options for Files
- Private Share Permissions for Files
- Sharing Files Privately with New Users
- Video of Sharing Files Privately with Existing Users

Private Share Options for Files

In the User Portal, you can configure how you share a private file when:

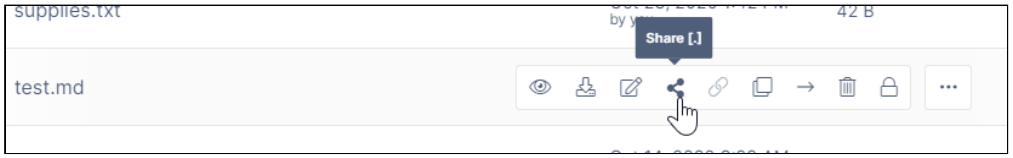
- You first create the share using **Share Options** - this button is available in the window that opens after you hover over a file and click the Share icon.
- After you create the share by opening it. The share opens to a window that displays the options.

Share options include:

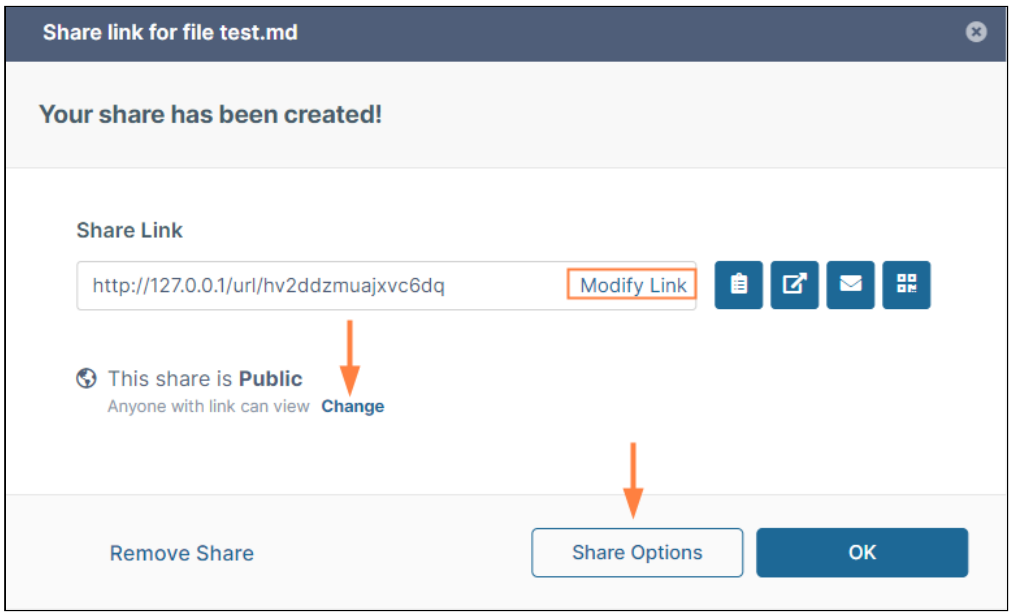
- Entering a custom share name
- Setting a share expiration date
- Disabling email notifications when a change is made to the share

To configure the share link and share options

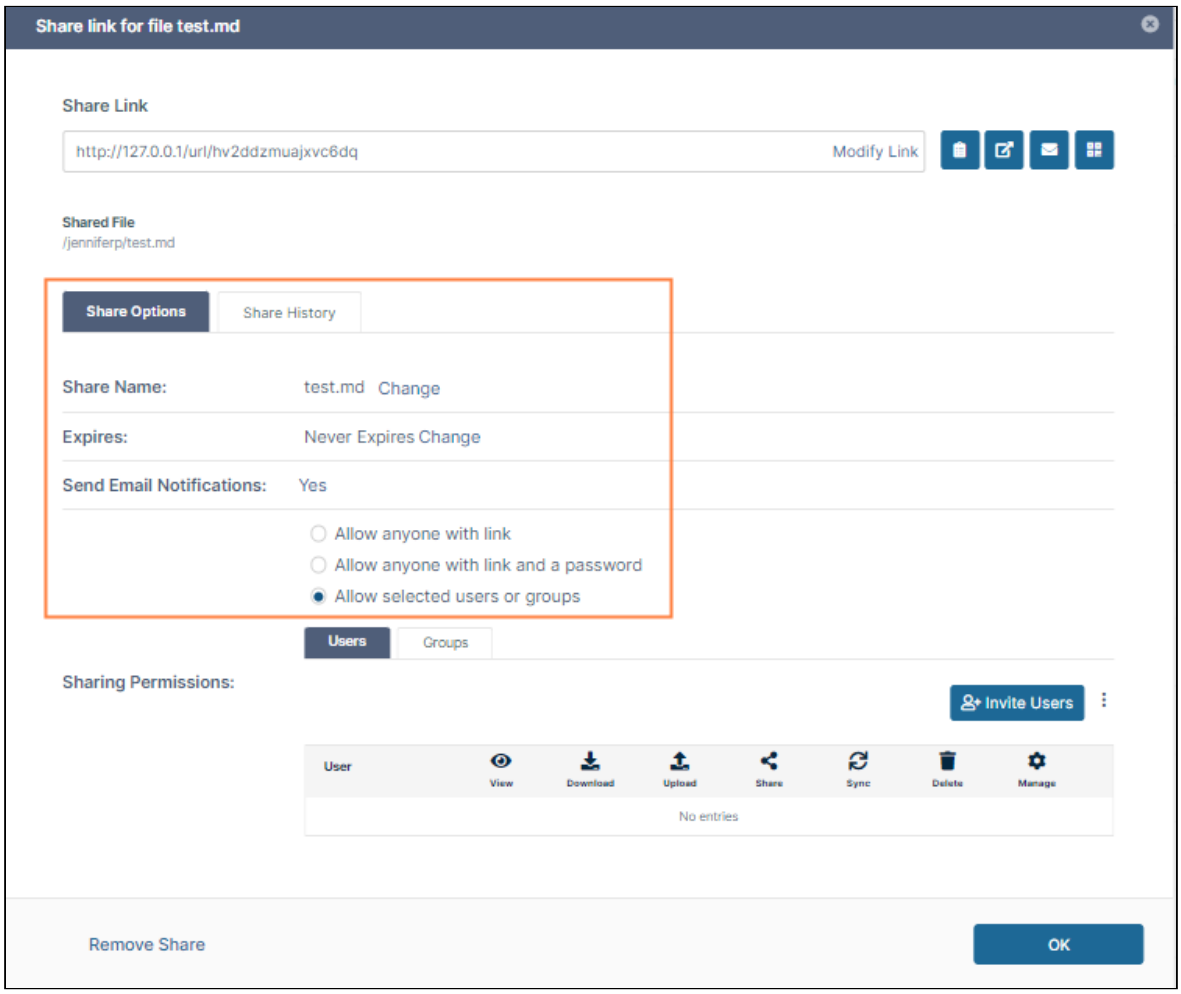
1. Hover over the file and click the **Share** icon.



   - If the file is not yet being shared, the **Share Link** dialog box opens.
     If you want to change the link name to something more memorable or descriptive, click **Modify Link**.
     The link becomes highlighted, and you can change it.



a. Click **Change** or **Share Options** to expand the the dialog box.
b. In the **Sharing Permissions** section, select **Allow selected users or groups**.
c. The **Sharing Permissions** section expands. (To create a private share, see Sharing Files Privately.)



- If the file has already been shared, the expanded dialog box shown above opens immediately.

2. Change the share options. View the video below to see how to change each option.
The following table describes each choice:

Option	Settings	Description
Share name	• randomly-generated name (default) • custom name	Customize the share name if you want it to be descriptive or memorable.
Expires	• Never (default) • Expires	By default, this is set to **Never**. If you set this to **Expires**, enter a date in the future when this file is no longer shared. When the share expires, the link becomes unusable to users but the file is not removed or changed.

Option	Settings	Description
Send Email Notifications	• Yes (default) • No	By default, this is set to **Yes**. • If set to **Yes**, then an email notification is sent when a file is opened or downloaded for a public share.
Sharing Permissions	• Allow anyone with link (default) • Allow anyone with link and a password • Allow Selected Users or Groups	You have set this to the third option, **Allow Selected Users or Groups**. This changed the share to private. If you set this to **Allow anyone with link** or **Allow anyone with link and a password**, the share becomes public. See Public Share Options for Files.

To save your changes, click **OK**.

Private Share Options Video

Play the following video to see how to set share options.

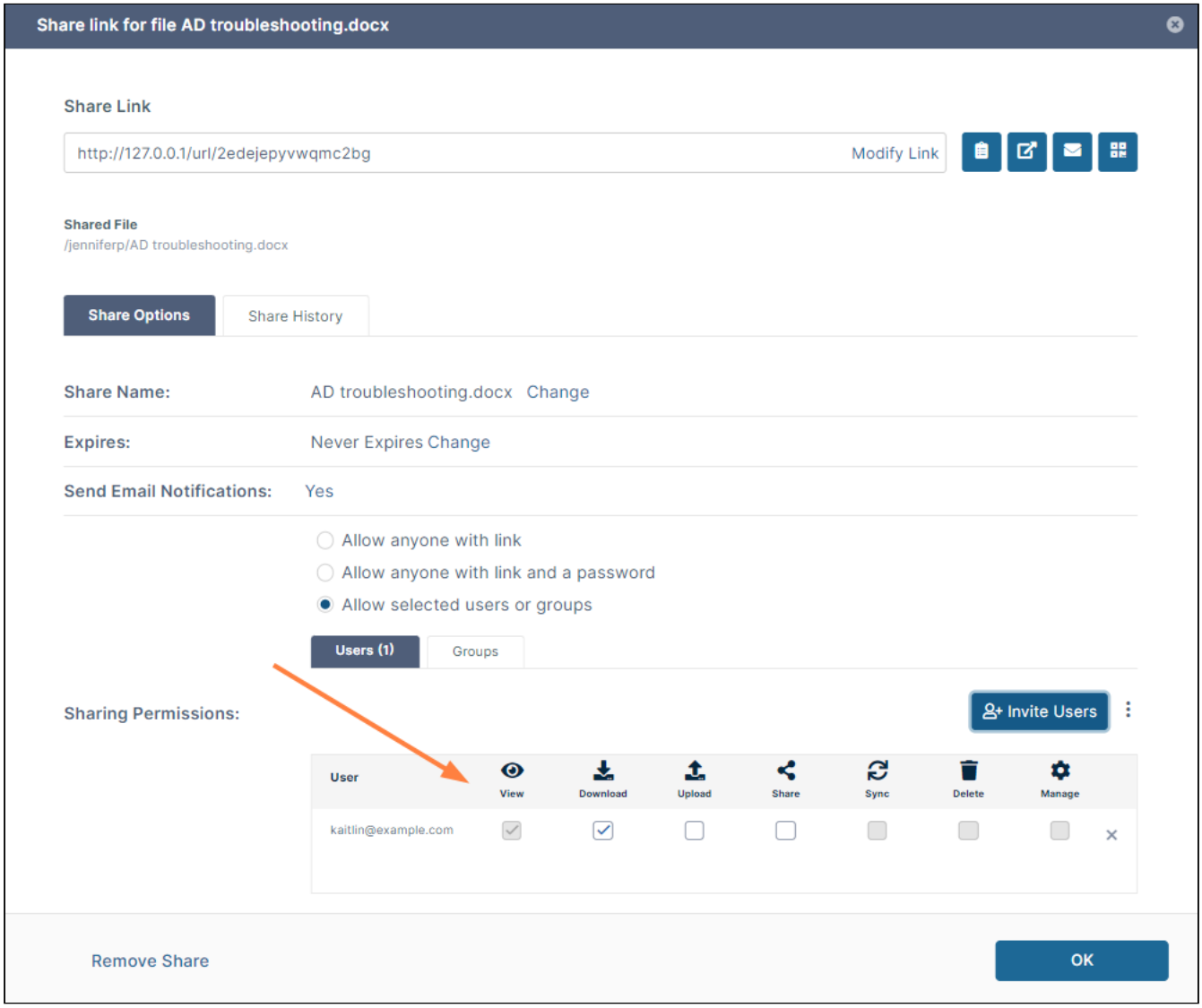
Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Private Share Permissions for Files

When you share a file privately with a user, by default, the user has permission to view and download the file. You can add additional permissions for each user.

On the **Share Link** dialog box, in the **Sharing Permissions** section, you can check and uncheck permissions:



The following table includes definitions of each permission.

Permission	Description
View	Every user with access to a share has view access. You cannot remove view access directly.
Download	Download permission allows a user to save the file.
Upload	Upload permission enables a user to upload the shared file.

Permission	Description
Share	Share permission allows a user to re-share files or folders with other users. If you enable Share permission, Download and Upload permissions are automatically enabled.

Sharing Files Privately with New Users

You can privately share a file with a user who does not have a FileCloud account yet but wants one.

Before you can invite a new user to create a FileCloud account, an administrator must configure the FileCloud site to allow it.
If you are not able to invite a new user to access your share, contact your administrator about allowing new user account creation.
If you are an administrator, follow these instructions to allow new users to create an account.
Enable New Account Creation Requests
Allow Users to Create a New Disabled Account
Allow Users to Create and Approve Accounts

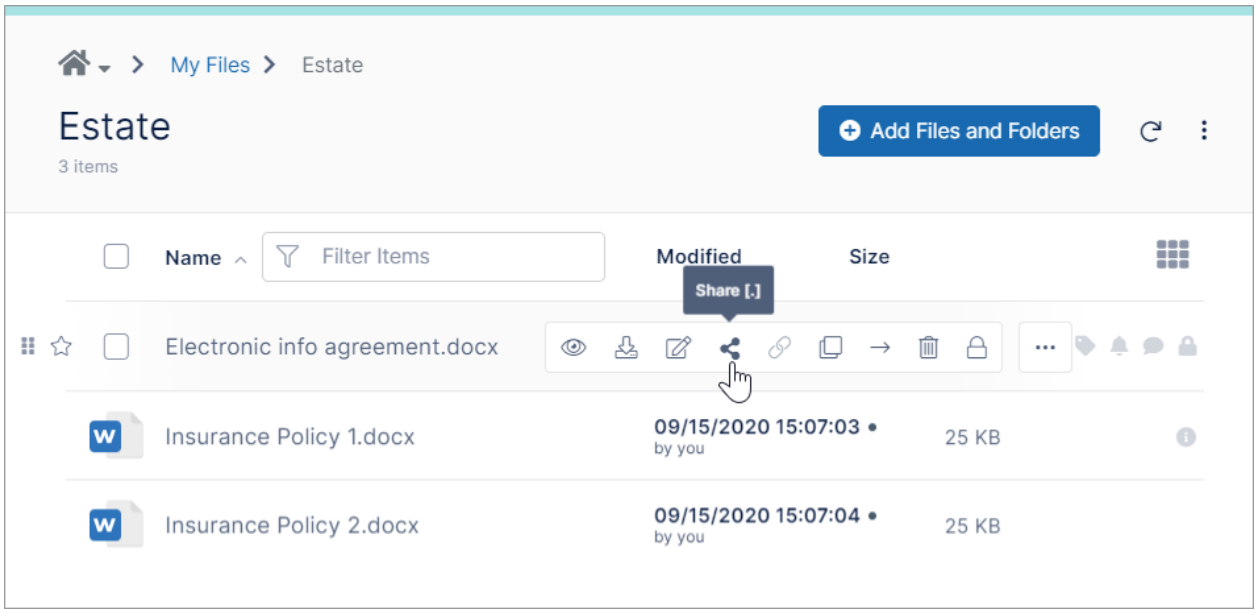
When you invite a new user to share your files, the following process occurs:

1. You share a file and invite a new user to create a FileCloud account.
2. Enter the new user's email address, invite them to the share, and then send them an email with a link to create an account.
3. The new user uses the link to create their own FileCloud account.
4. After the new user signs in, they have a Full Access FileCloud account.
5. The new user can access the file.

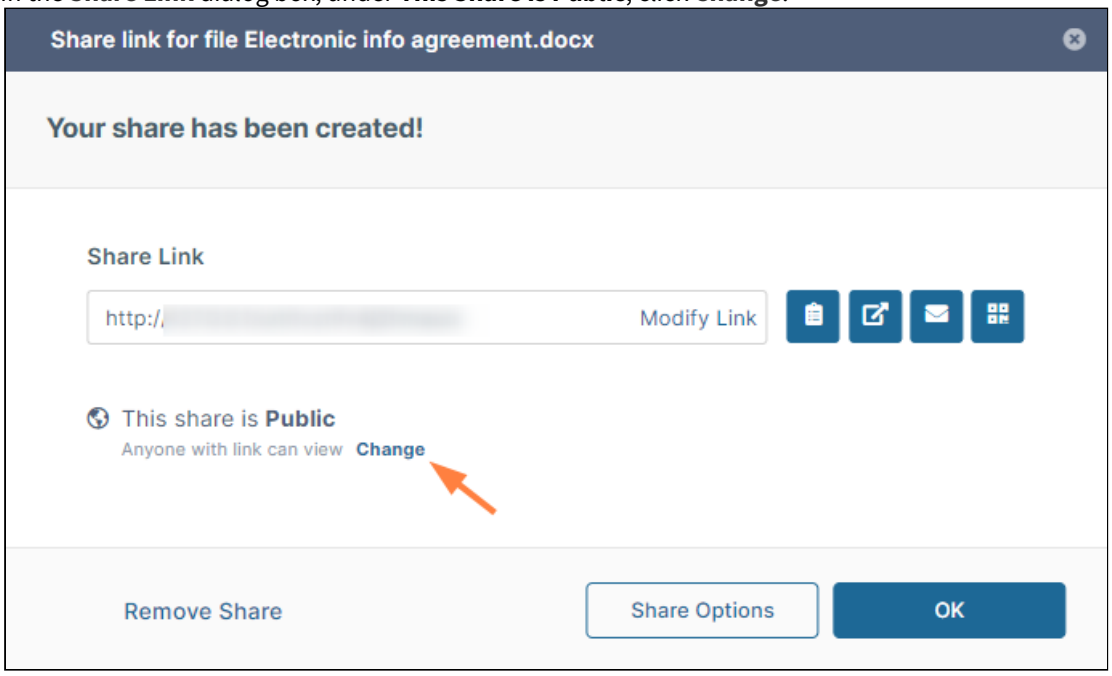
To share a file with users who do not have a FileCloud account

1. In the user portal, navigate to the file you want to share.

2. Hover over the file and click the **Share** icon.

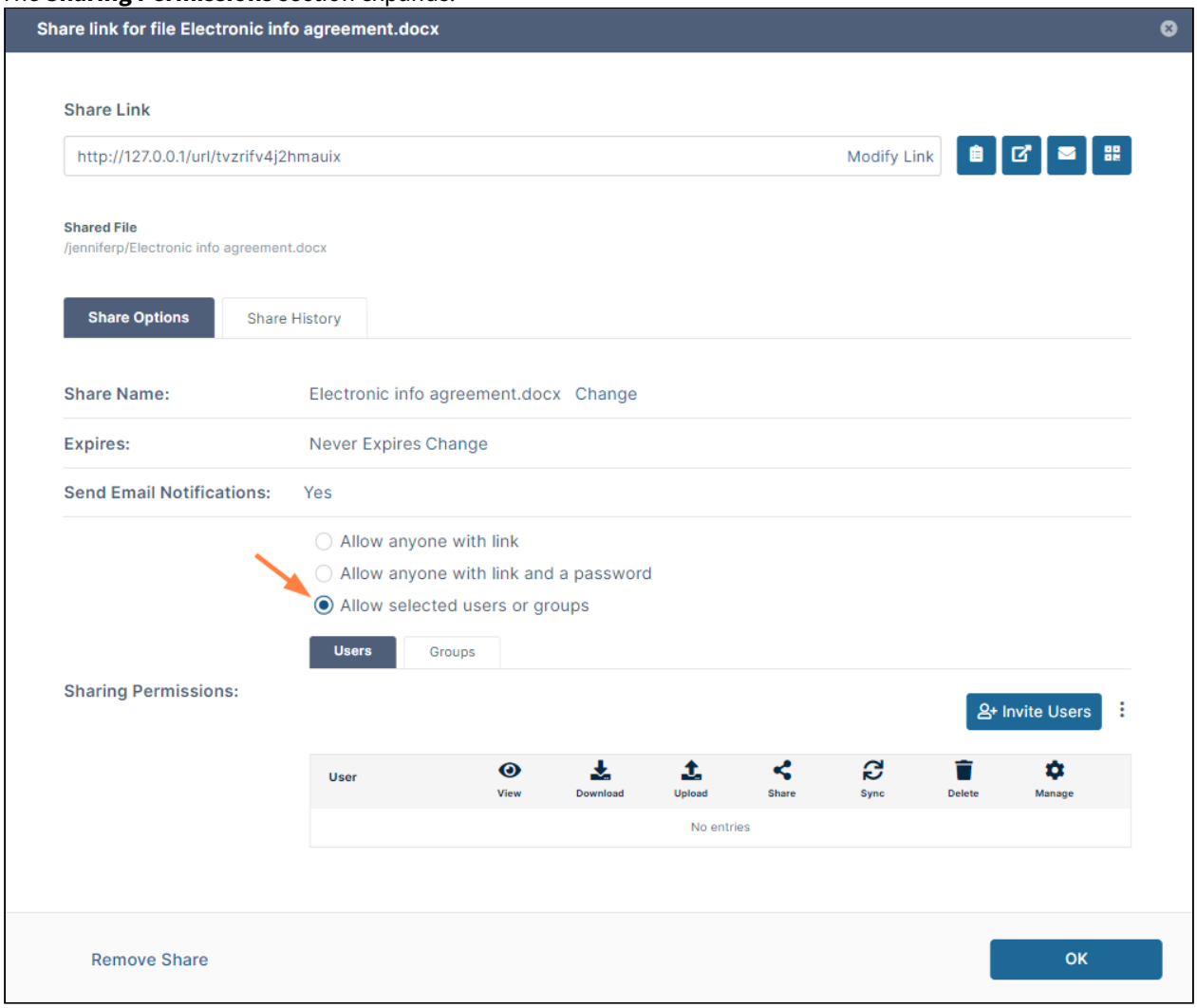


3. In the **Share Link** dialog box, under **This Share is Public**, click **Change**.

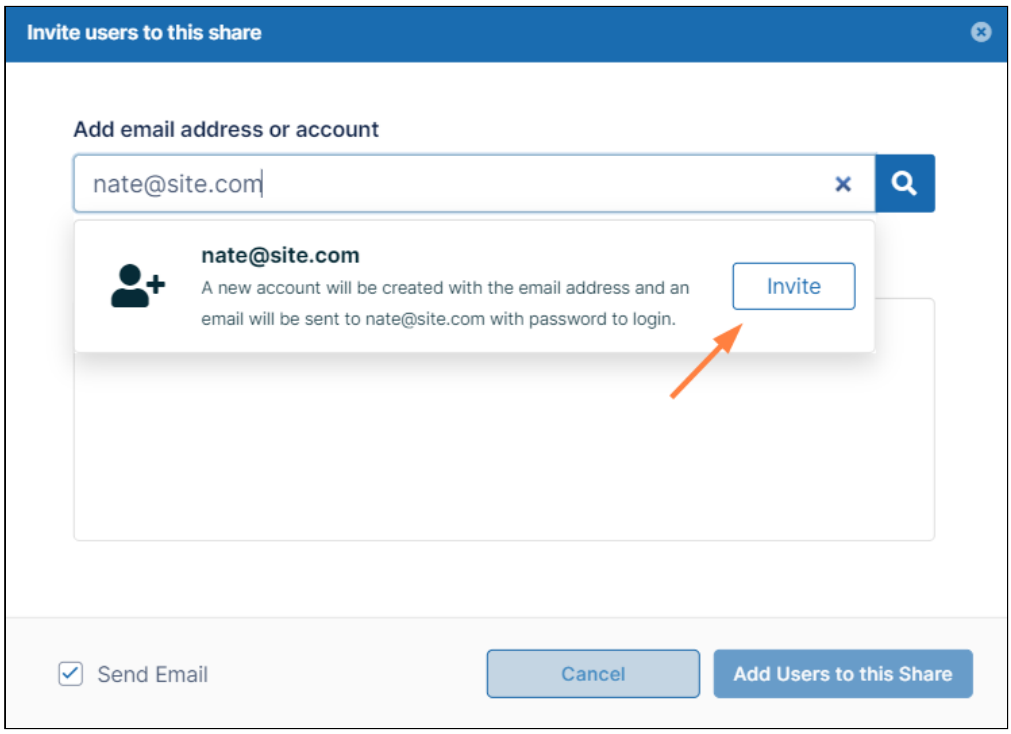


4. The **Share Link** dialog box expands.

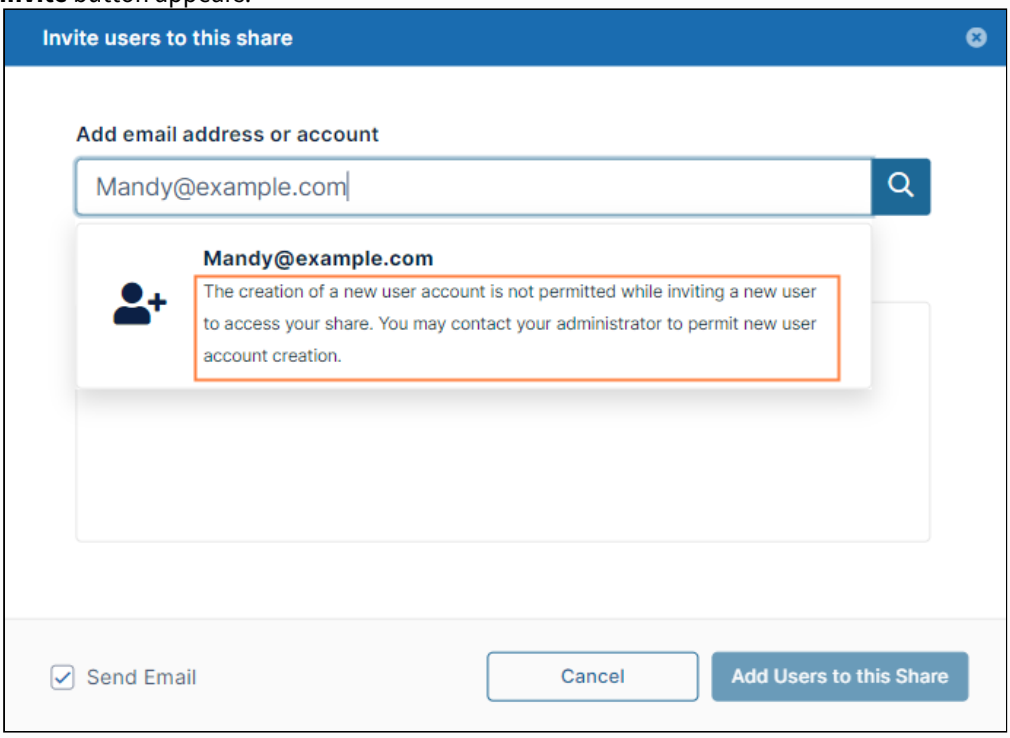
5. In the **Sharing Permissions** section, select **Allow selected users or groups**.
   The **Sharing Permissions** section expands.



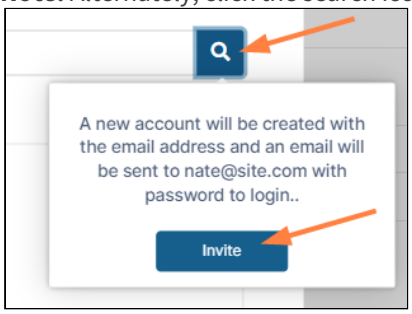
6. To invite a new user to the share:
   a. In the **Users** tab, click **Invite Users**.
      The **Invite users to this share** dialog box opens.
   b. In **Add email address or account**, type in the user's email address.
      The system does not find the email address and displays an **Invite** button.



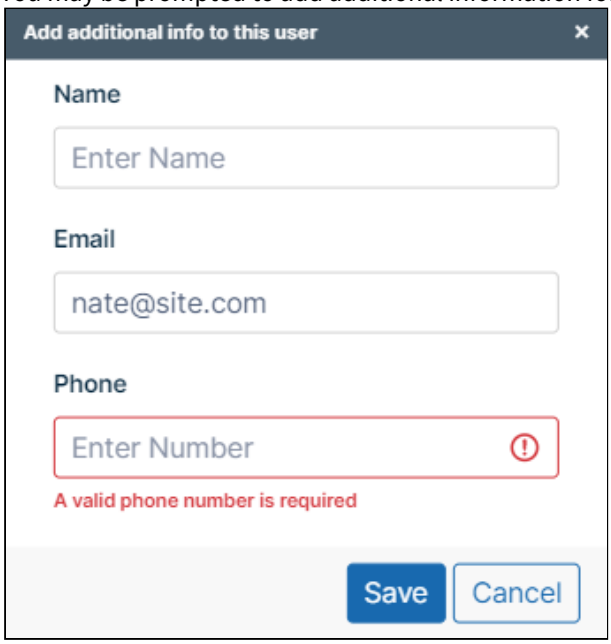
Note: If you are not allowed to invite a new user to your share, the following message without the **Invite** button appears:



c. Click **Invite.**
Note: Alternately, click the search icon, and in the new account message, click **Invite**.

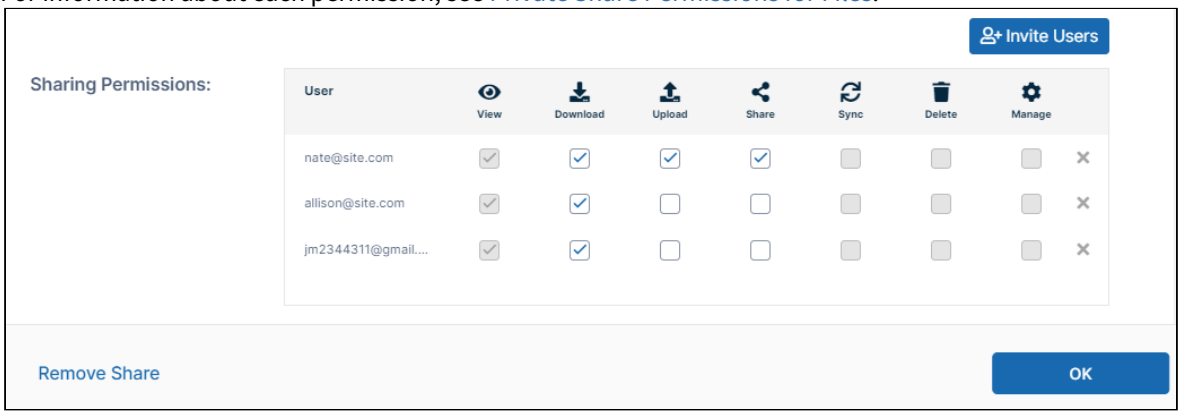


d. Add any number of new or existing users to the share.
To add existing users, see Sharing Files Privately.
e. Leave **Send email** checked.
f. Click **Add Users to this Share**.
You may be prompted to add additional information for new users:



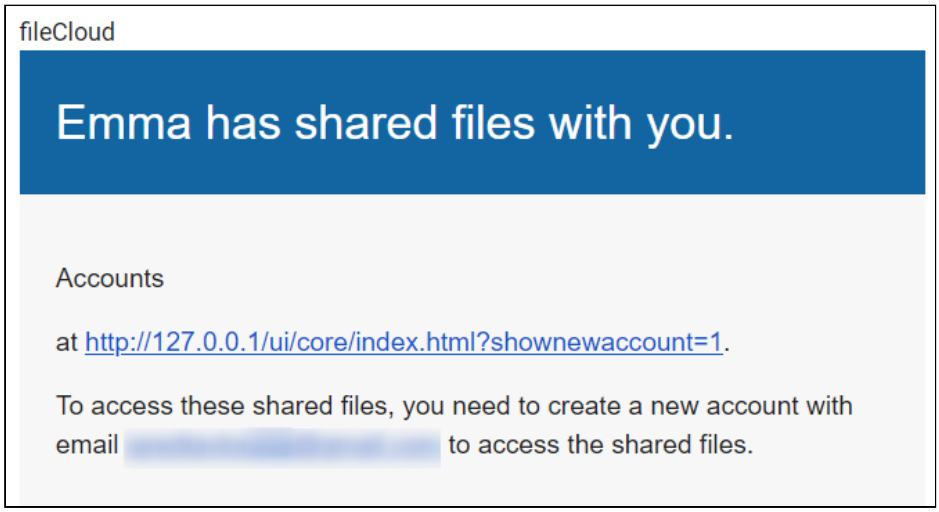
g. Enter the requested information and click **Save**, then click **Add Users to this Share** again.
The users are added to a **Sharing Permissions** section of the **Share link** dialog box. By default the users can view and download the share.

h. Check and uncheck enabled boxes to make any changes to the permissions.
For information about each permission, see Private Share Permissions for Files.

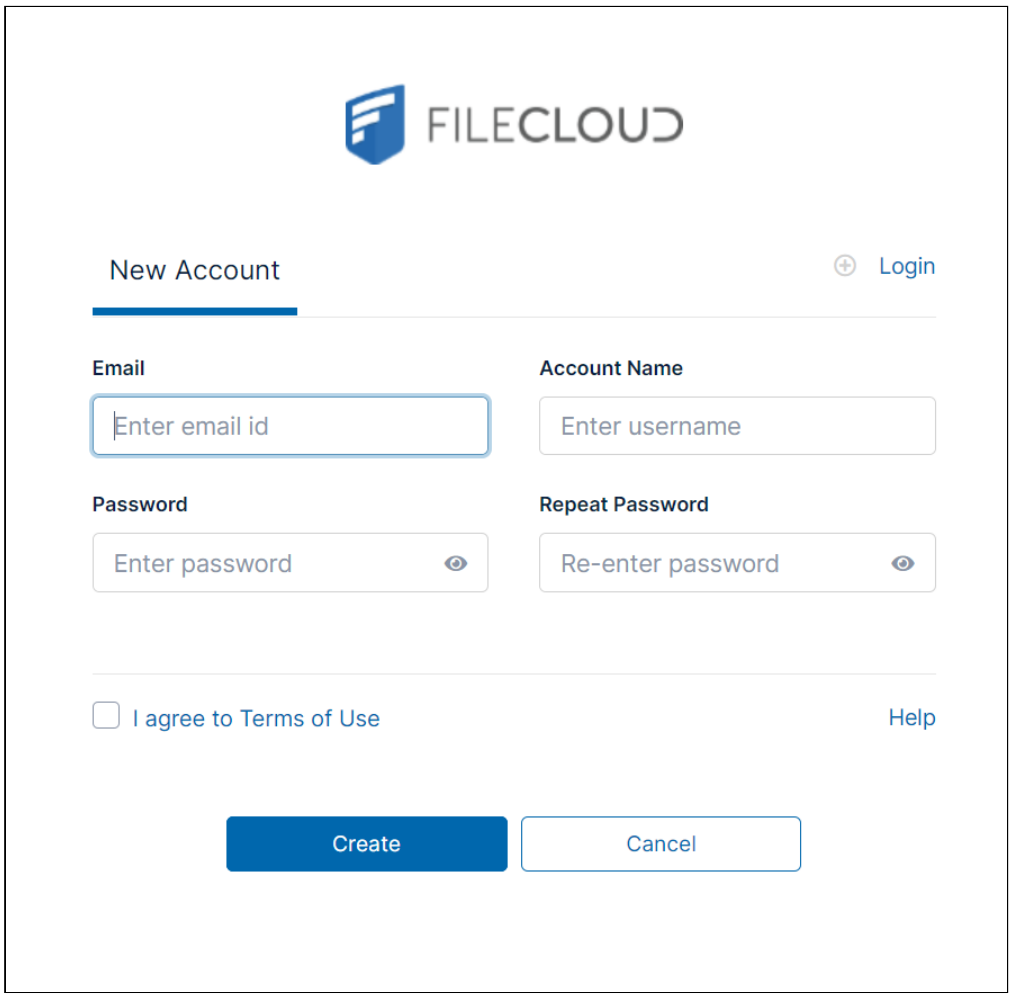


How the invited user signs up for an account

The invited user receives an email similar to:



When the user clicks the link, the following window opens:



The user creates the account using the form, and can then log in to FileCloud and navigate to the Shared with Me folder to view the share.

Video of Sharing Files Privately with Existing Users

You can share a file with a user who has a FileCloud account. This is called a Private share.

In the following video, see how to share a file privately.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Share a Folder Privately

The ability to re-share and also manage subsequent shares that have been created from your original share is available in FileCloud version 18.2

- Sharing privately provides more security when sharing folders and files.
- This is useful when you only have a small number of people you want to share with.
- You are able to look up existing FileCloud users' email addresses, and then send them an email with a link to the share.
- You can send a share link to a user without a FileCloud account and invite the user to create an account to access the share. See Sharing Files Privately with New Users.
- You can copy and paste share recipients from one private share to another.

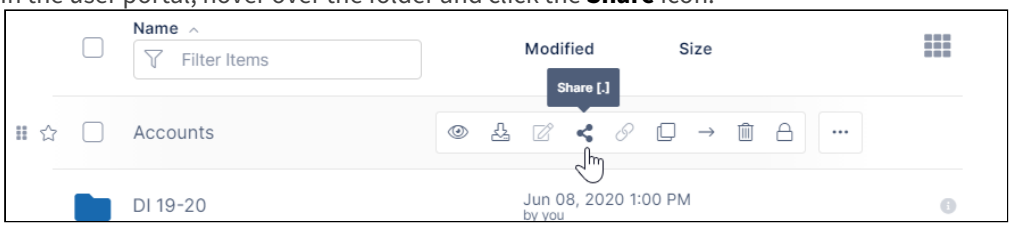
When you share a folder privately, users are required to log in with their FileCloud accounts to access the folder and its contents on the User Portal.

A private share owner you have the ability to:

- View and manage re-shares; that is, shares created from your shared folder by other users.
- Assign managers to view and manage re-shares.

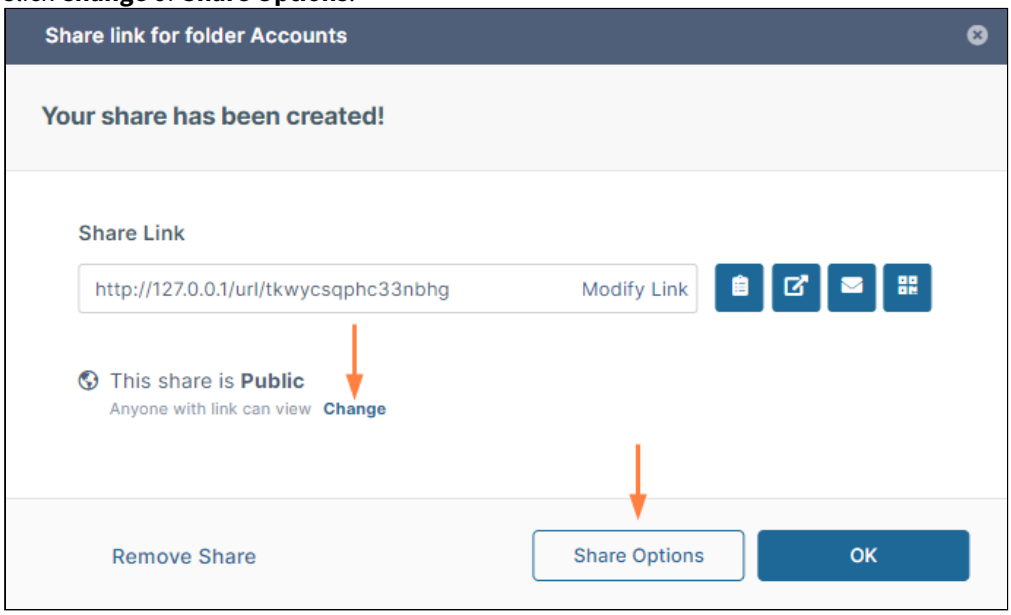
To share a folder privately

1. In the user portal, hover over the folder and click the **Share** icon.



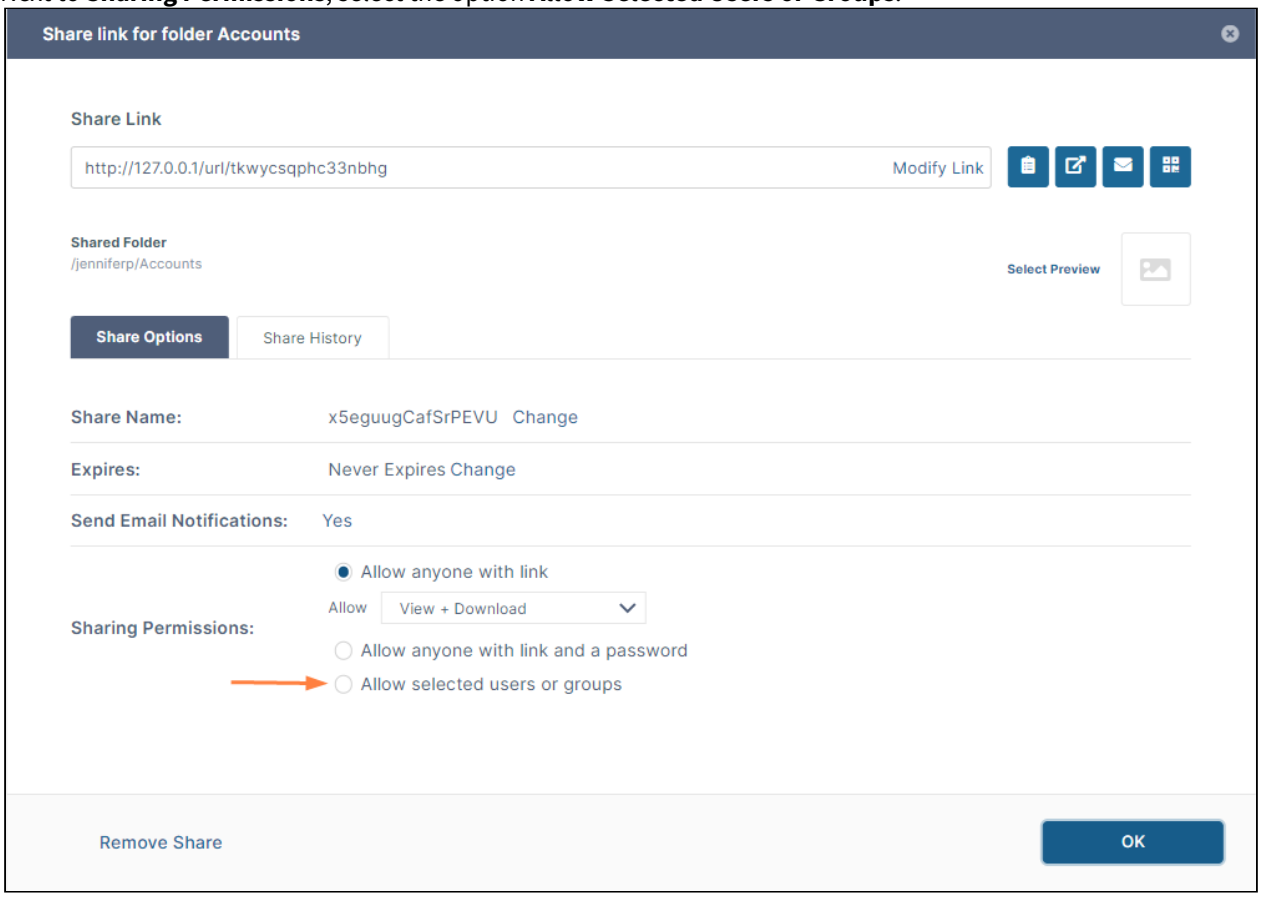
The **Share link** dialog box opens.
At this point, the share is public.

2. Click **Change** or **Share Options**.



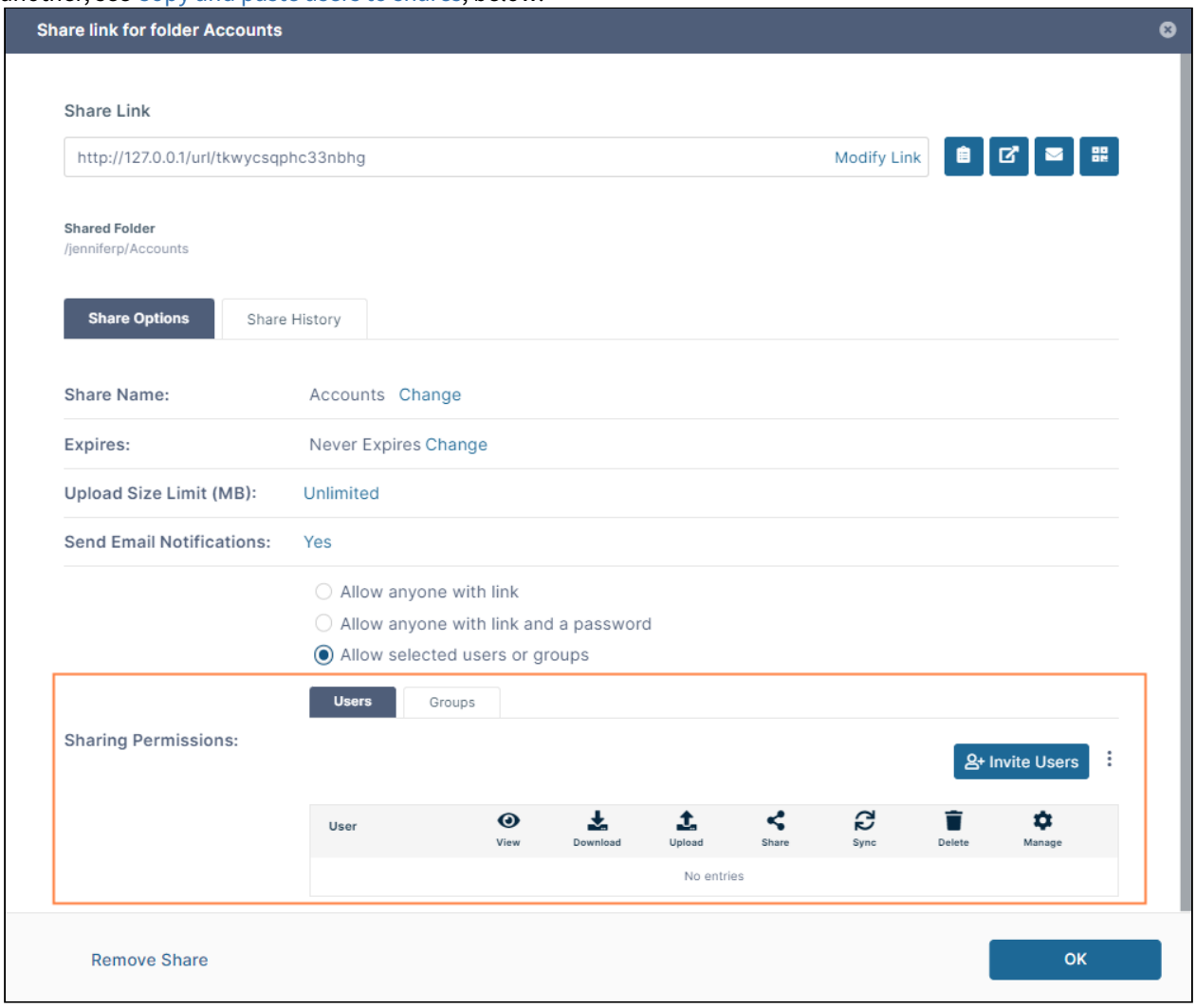
The **Share link** dialog box expands.

3. Next to **Sharing Permissions**, select the option **Allow Selected Users or Groups**.



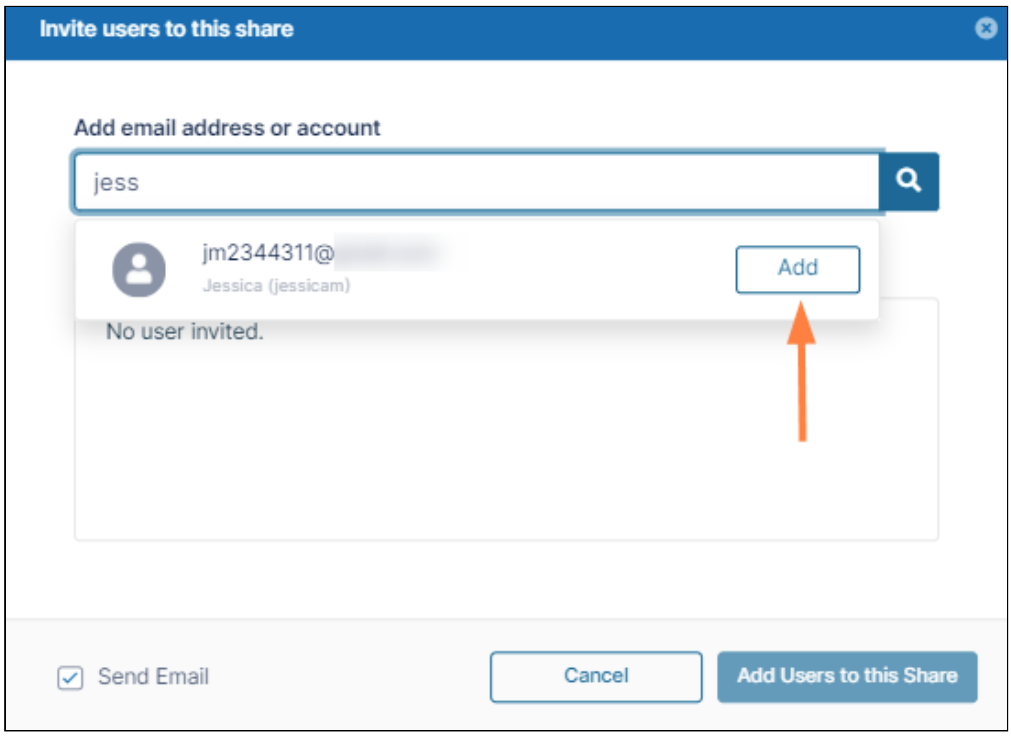
A section with **User and Groups** tabs opens below **Sharing Permissions**.

4. Share options for private folder shares are the same as share options for public folder shares, except you cannot include a password for accessing the share. To configure the Share Options, see Share Options for Public and Private Folders.
5. On the **Users** tab, click **Invite Users** to add individual users to the share. (To copy users from one share to another, see Copy and paste users to shares, below.



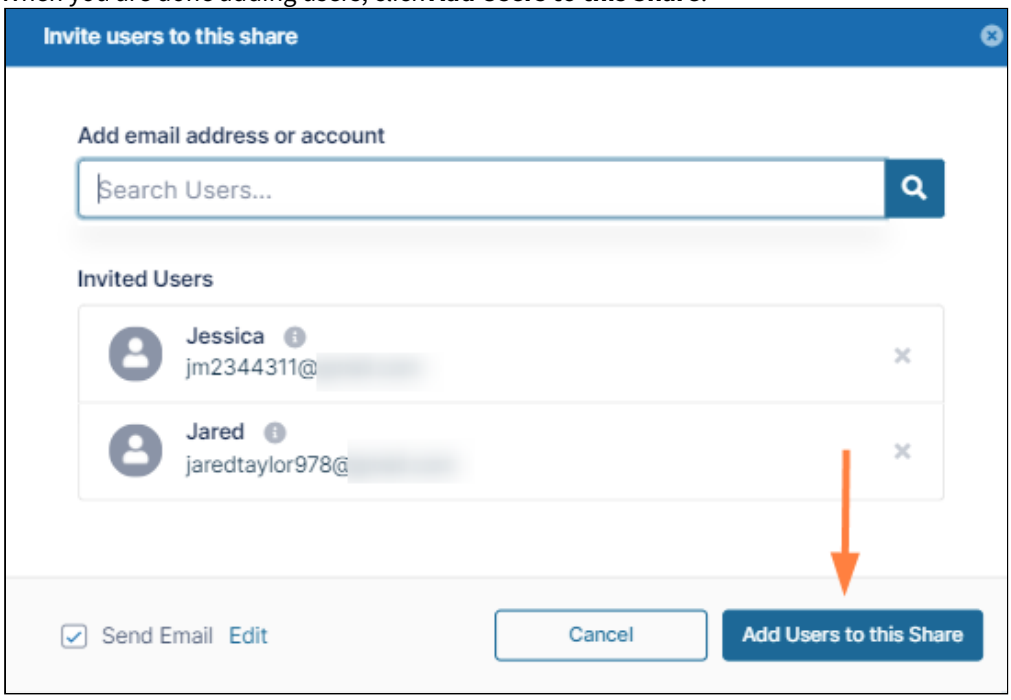
An **Invite Users to this Share** dialog box opens.

6. In **Add email address or account**, begin to enter the user name or email address of a user with a FileCloud account.
   Any matching users appear.



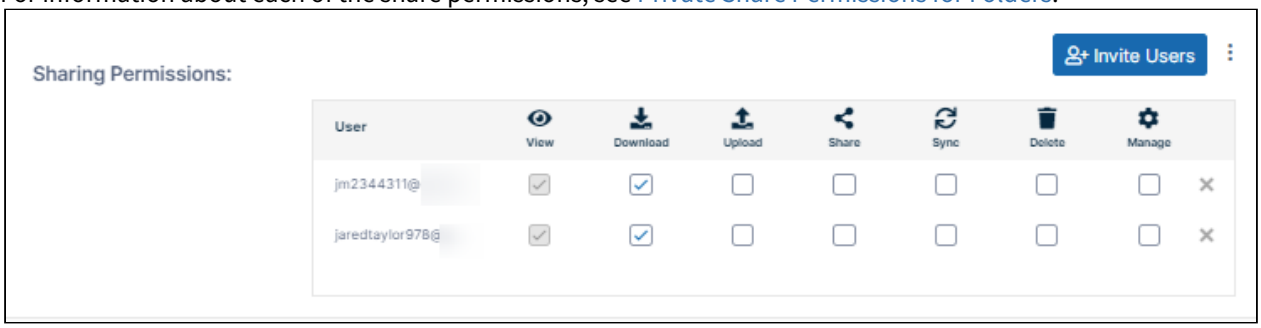
7. Click **Add** to add the user to the **Invited Users** dialog box.
8. Add any number of users to the share.
   You may also add users who do not have existing FileCloud accounts. See Share a Folder Privately with New Users for help.
9. **Send Email** is checked by default. To edit the email you are sending, or to not send email, see Sending an Email Notification for a Private Share, below.

10. When you are done adding users, click **Add Users to this Share**.

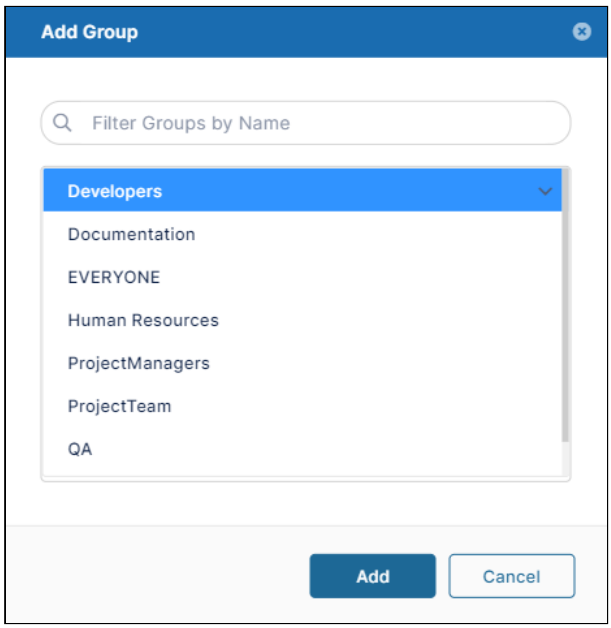


The Invite users to this share dialog box closes, and the users appear under **Sharing Permissions**.

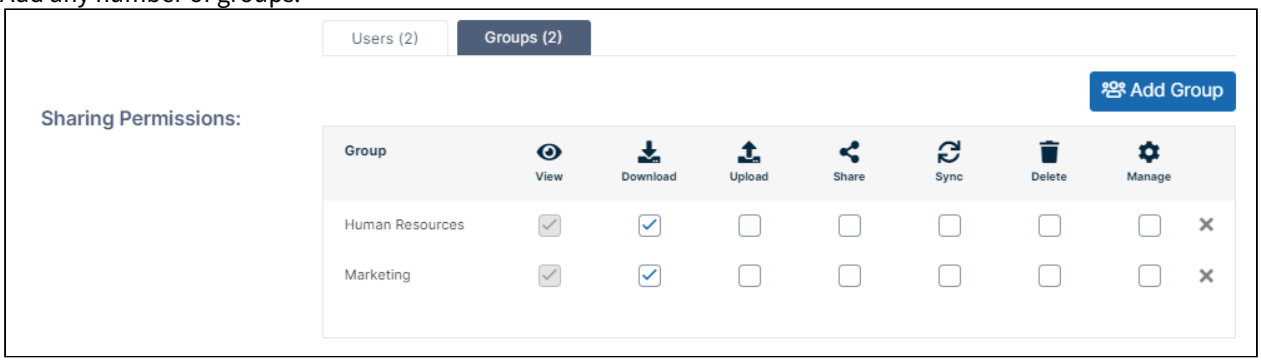
11. Check and uncheck the sharing permissions buttons for each user to change the actions they can perform on the share.
By default, only **View** and **Download** permissions are enabled on private folder shares. You cannot remove **View** permission because that would remove the user from the share; however, if you want to remove the user from share, click **x** at the end of the row.
For information about each of the share permissions, see Private Share Permissions for Folders.



12. Click the **Groups** tab and then click **Add Groups** to add FileCloud groups to the share.
An **Add Group** dialog box opens.



13. Select a group and click **Add**.
14. Add any number of groups.



15. Modify the actions each group can perform on shares.
16. Click **OK** to save your changes to the private share.

Note: If you add a user as a share recipient, and also add a group that includes the user as a share recipient, the user's share permissions are used and the group permissions are ignored for the user. The group permissions apply to users in the group who are not added individually as share recipients.

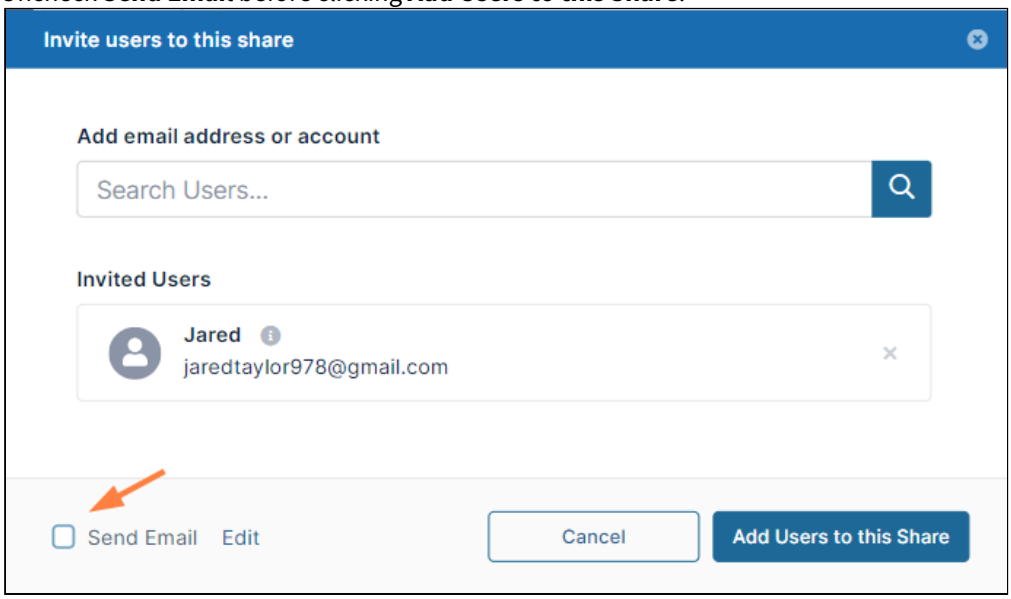
Sending an Email Notification for a Private Share

By default, when you are adding a user to a private share, the **Send Email** box in the **Invite users to this share** dialog box is checked.

If you leave the box checked, an email with the share link is sent to users added to the share.

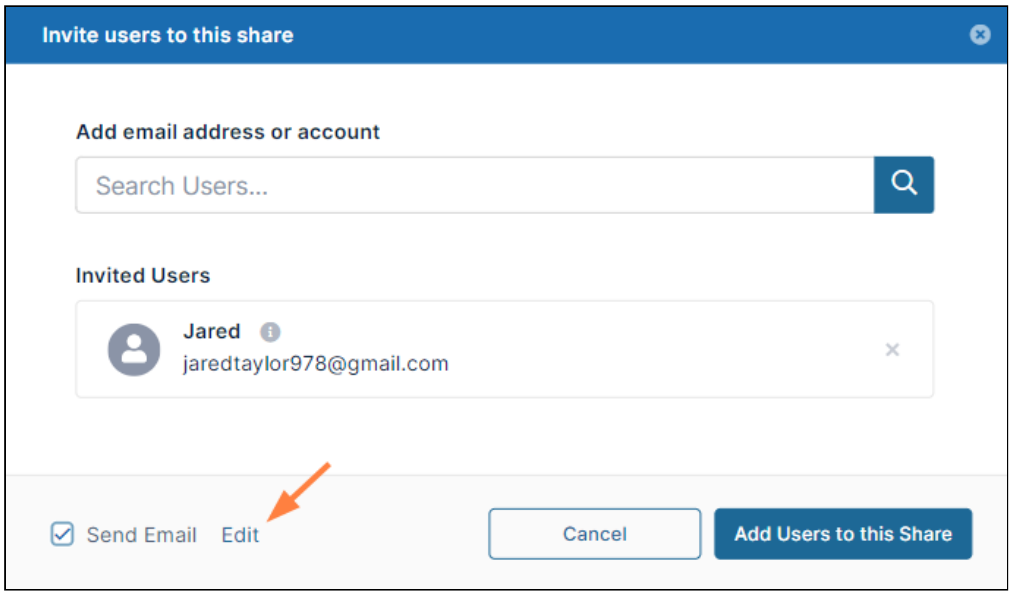
To not send the email to share members:

1. Uncheck **Send Email** before clicking **Add Users to this Share**.

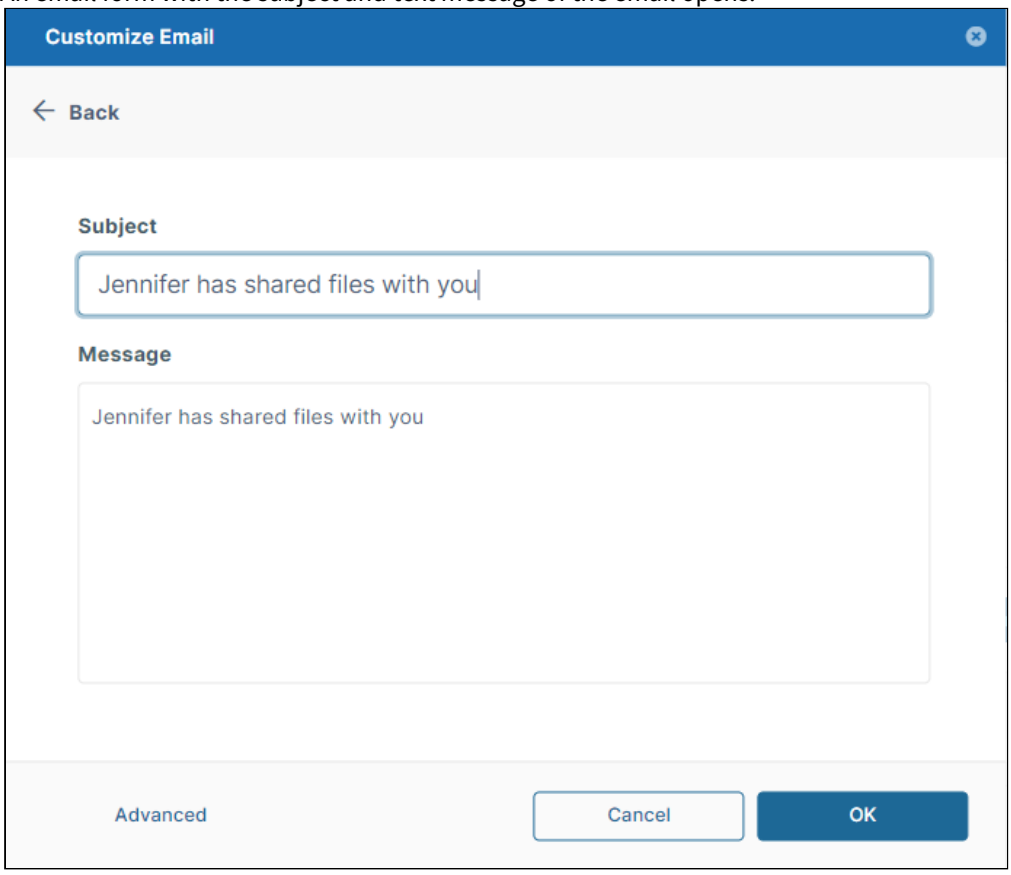


To customize the email content

1. Leave **Send Email** checked and click **Edit**.

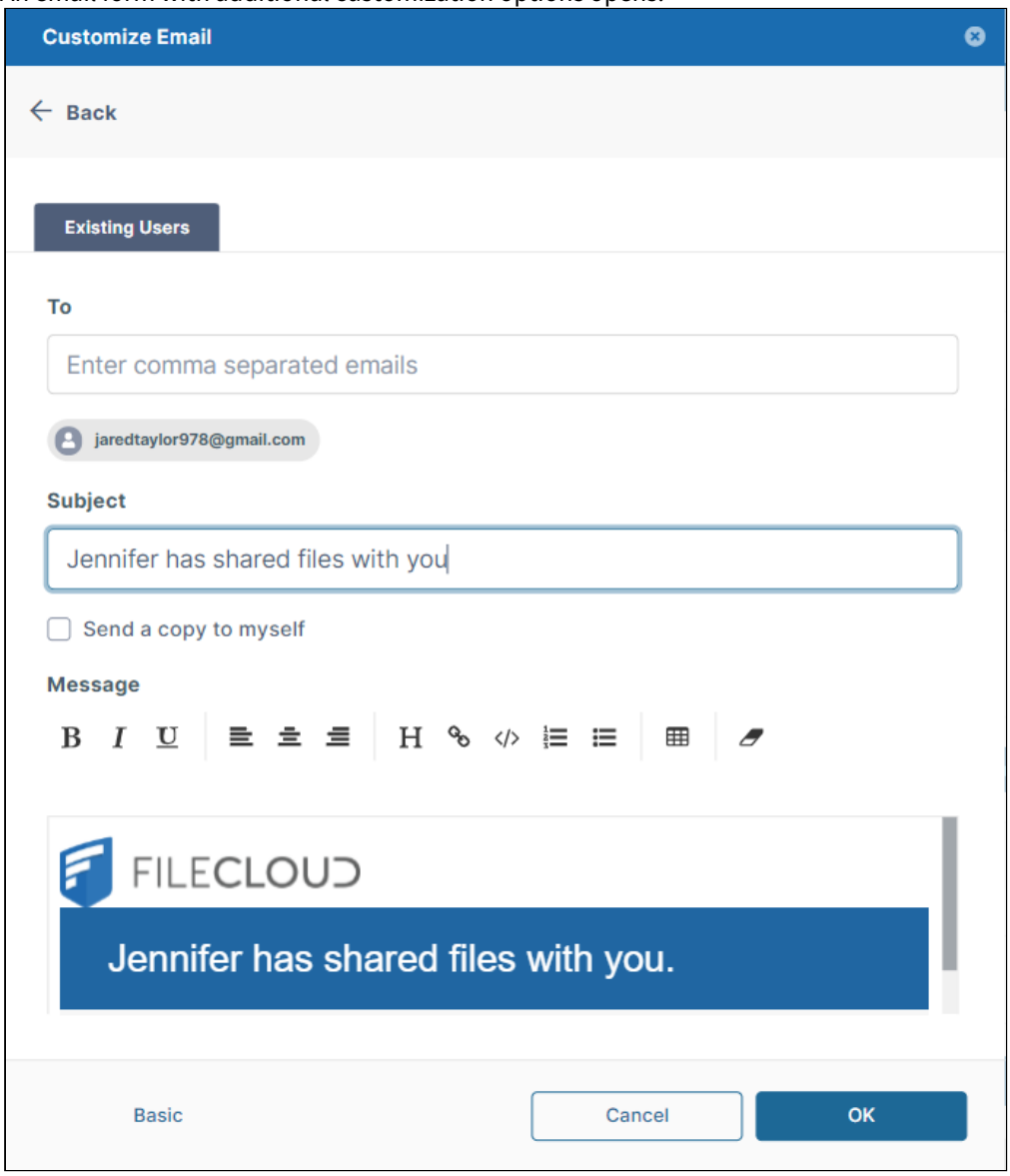


An email form with the subject and text message of the email opens.



2. If you want to change the subject or text of the message, change it here, and click **OK**.

3. If you want to add additional recipients, change the format of the email, or remove the link, click **Advanced**. An email form with additional customization options opens.



4. Make any changes, and click **OK**.

Copy and paste users to shares

After you have added users to a private share, you can copy the users and then paste them into another share.

To copy and paste users in shares:

1. Create a private share, and add users to it.
2. Click the icon that appears to the right of the **Invite Users** button, and then click **Copy Users**.
3. Create another private share.

4. To add the same users, click the icon to the right of the **Invite Users** button, and then click **Paste Users**.

During the session, you can continue to paste the same users until you copy a new set of users.

Also see:

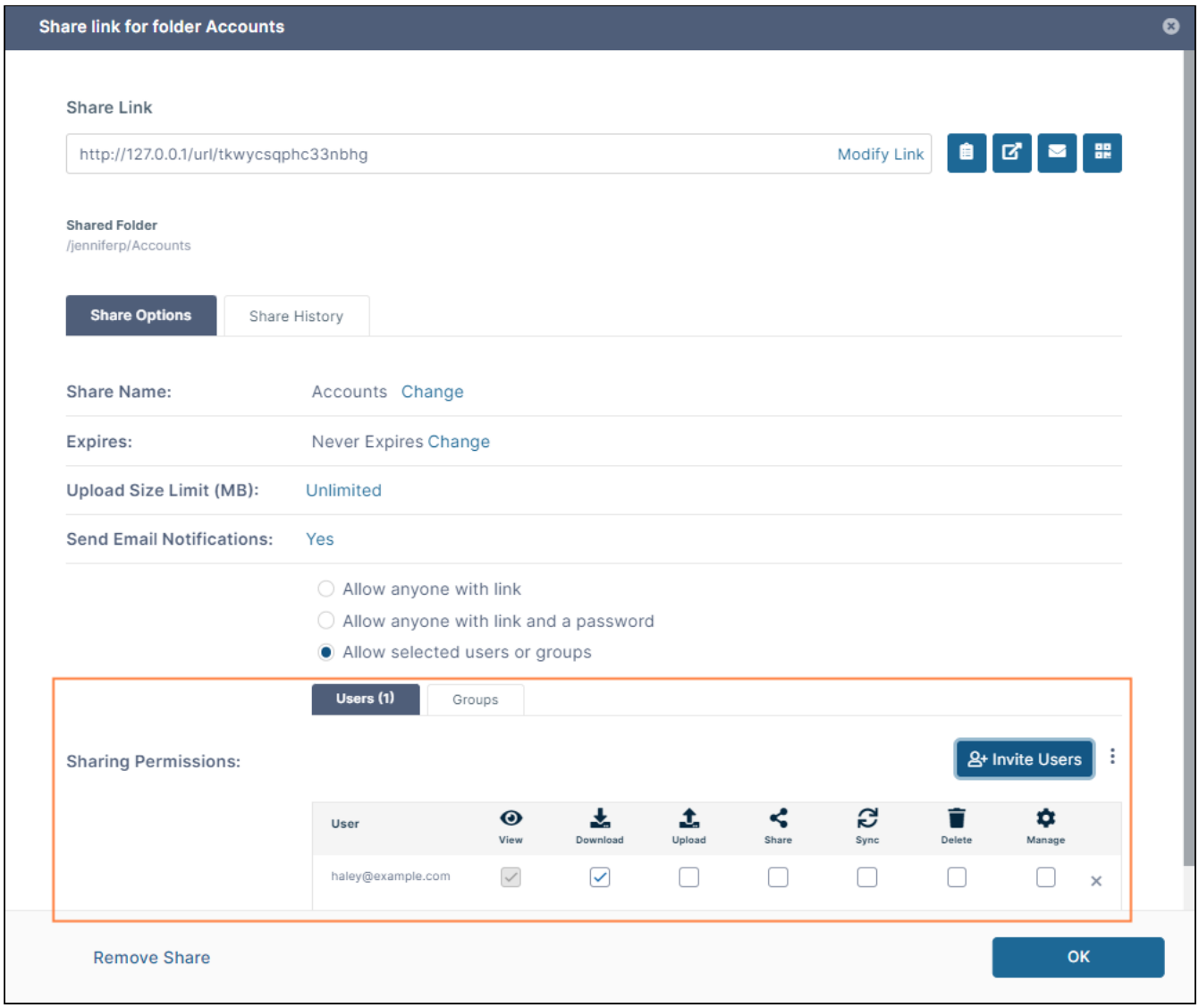
- Private Share Permissions for Folders
- Share a Folder Privately with New Users
- Allow Share Members to Manage Re-Shares

Private Share Permissions for Folders

The ability to re-share and also manage subsequent shares that have been created from your original share is available in FileCloud version 18.2

When you share a folder privately, by default, users have permission to view and download the folder. You can add additional permissions for each user.

On the **Share Link** dialog box, in the **Sharing Permissions** section, if you choose **Allow selected users or groups** you can choose from several permissions options:



The following table includes definitions of each permission.

Permission	Description
View	Every user with access to the share has view access. View access allows users to view or browse files in the folder. You cannot remove view access.
Download	Download permission allows a user to save a file in the folder to their desktop or client.

Permission	Description
Upload	Upload permission allows the user to: • Add a file to the shared folder • Delete folders inside the shared folder • Modify files inside the shared folder • Create new folders inside the shared folder
Share	Share permission allows the user to share the folder contents again with other users. If you enable Share permission, Download, Upload and Delete permissions are automatically enabled; however, you can remove Delete permission.
Sync	Sync permission allows users to synchronize the contents of the shares using their FileCloud Sync app. If you enable Sync permission, Download, Upload and Delete permissions are automatically enabled; however, you can remove Delete permission.
Delete	Delete permission allows users to delete a file from the folder. If you enable Delete permission, Upload permission is automatically also enabled, but Upload permission can then be removed. • Files can be deleted only when upload access is set on the folder. • Folders can be given upload permission but not delete permission.
Manage	Manage permission allows users to manage this share and reshares of this share, including removing permissions and users.

Share a Folder Privately with New Users

You can share a folder with a user who does not have a FileCloud account yet but wants one.

This is called a Private share because:

- You are only allowing specific users with a FileCloud account to access your folder and all its contents.

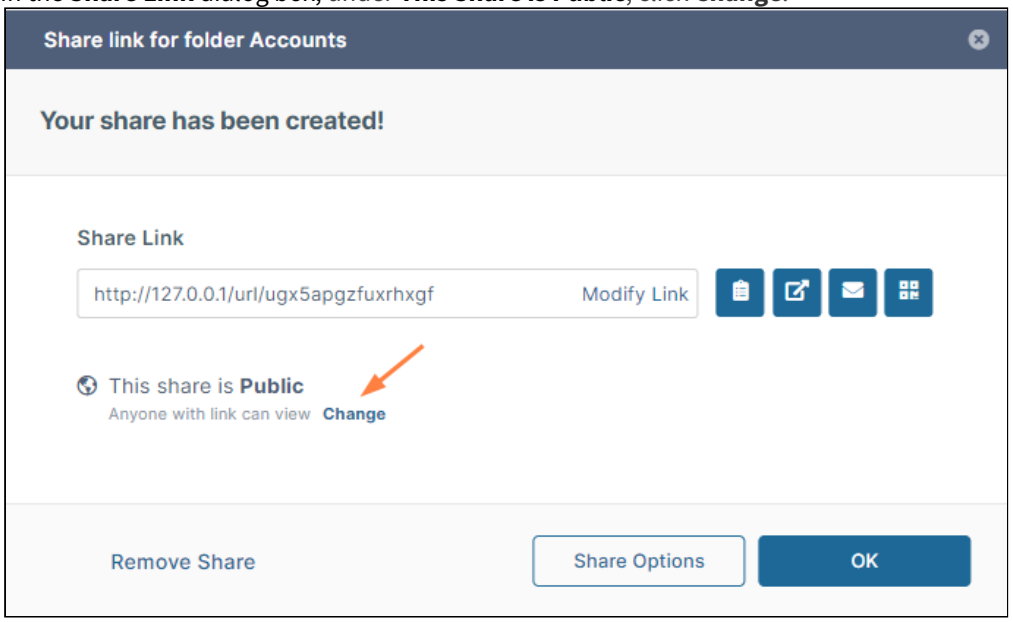
When you invite a new user to share your folder and all its contents, the following process occurs:

1. You share a file and invite a new user to create a FileCloud account.
2. Enter the new user's email address, invite them to the share, and then send them an email with a link to create an account.
3. The new user uses the link to create their own FileCloud account.
4. After the new user signs in, they have a Full Access FileCloud account.
5. The new user can access the folder and all its contents. Their ability to manage the folder and its contents is determined by the permissions you set.

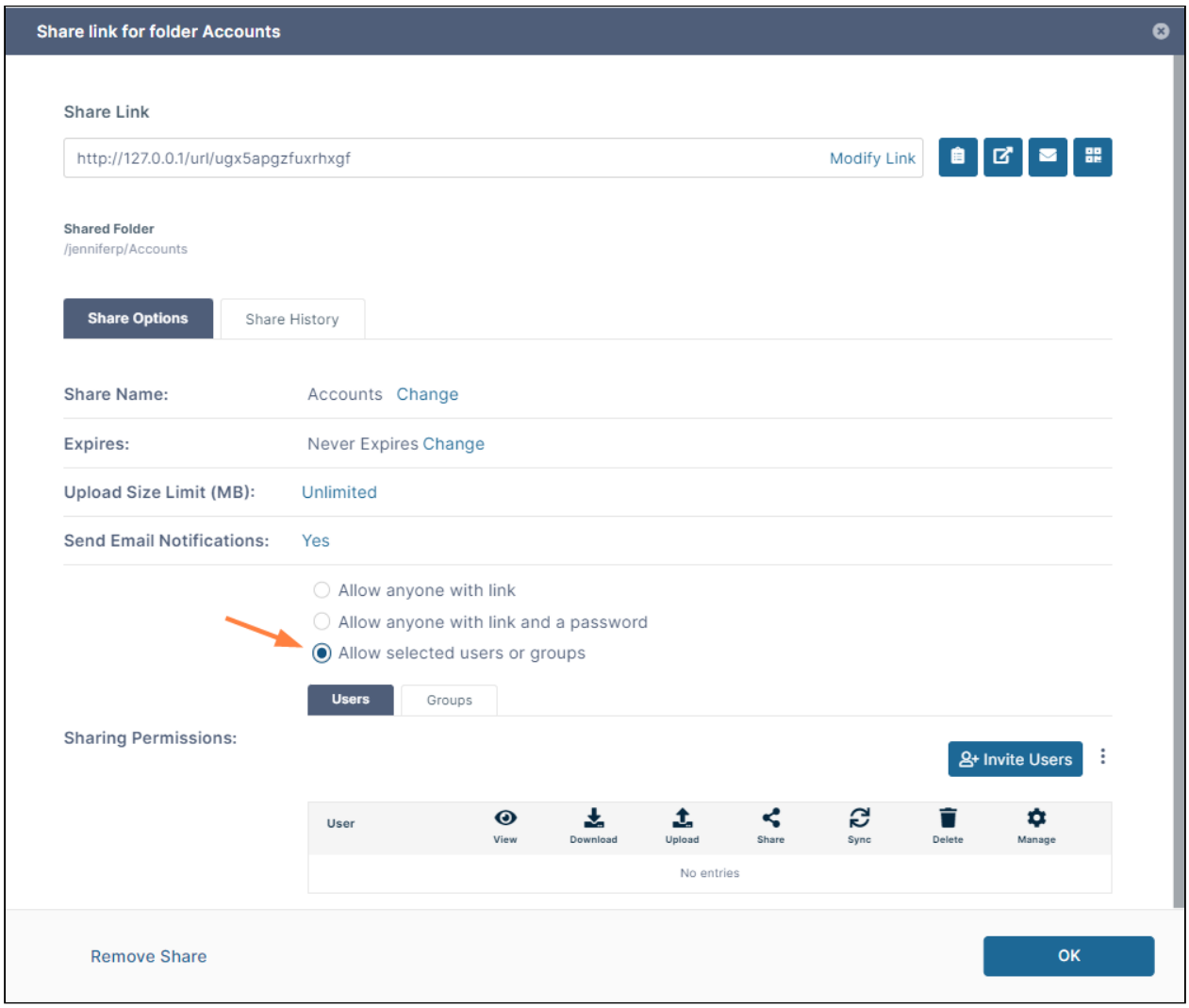
To share a folder with users who do not have a FileCloud account

1. In the user portal, navigate to the folder you want to share.
2. Hover over the folder and click the **Share** icon.

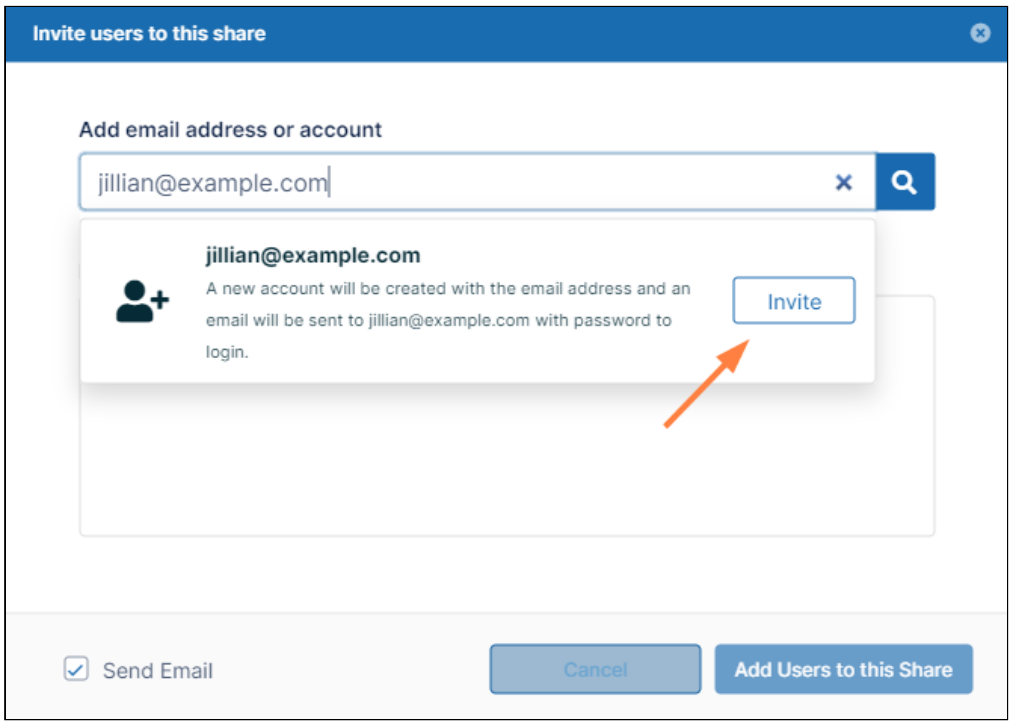
3. In the **Share Link** dialog box, under **This Share is Public**, click **Change**.



4. The **Share Link** dialog box expands.
5. In the **Sharing Permissions** section, select **Allow selected users or groups**.
   The **Sharing Permissions** section expands.

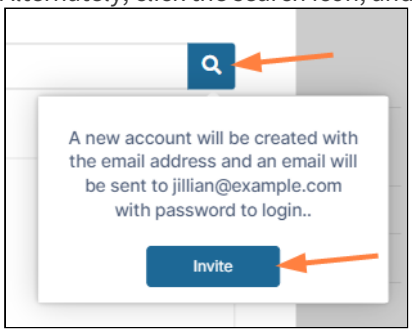


6. To invite a new user to the share:
   a. In the **Users** tab, click **Invite Users**.
      The **Invite users to this share** dialog box opens.
   b. In the search bar, type in the user's email address.
      The system does not find the email address and displays an **Invite** button.

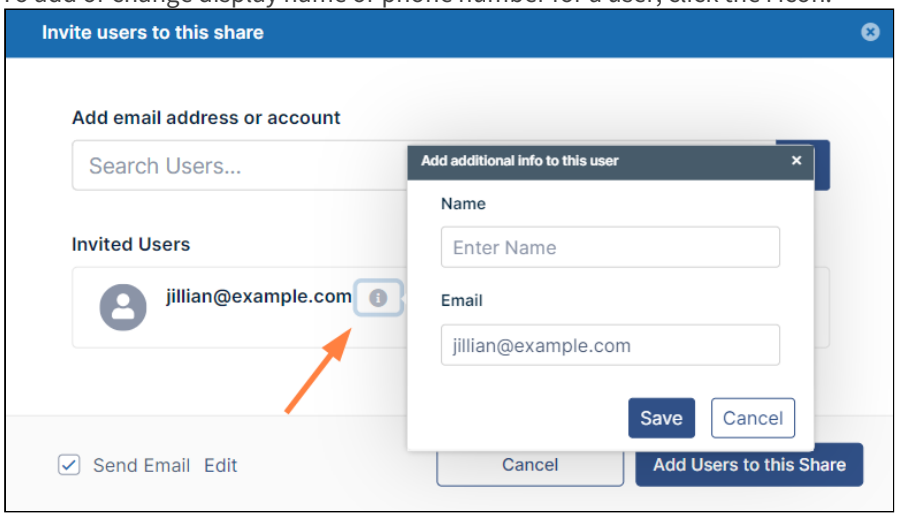


c. Click **Invite.**

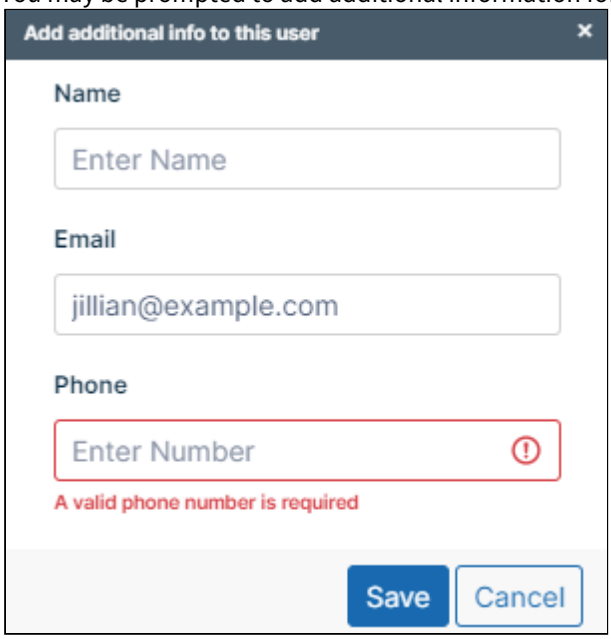
- Alternately, click the search icon, and in the new account message, click **Invite**.



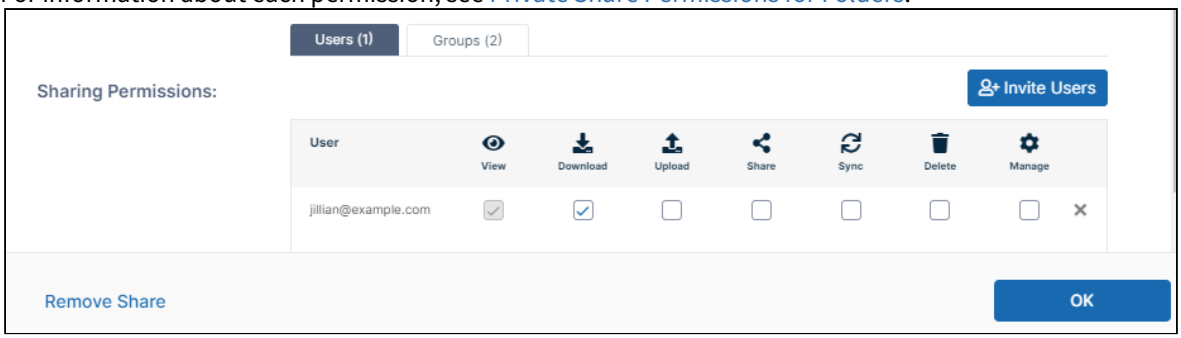
- To add or change display name or phone number for a user, click the i icon:



d. Add any number of new or existing users to the share.
   To add existing users, see Share a Folder Privately.
e. Leave **Send email** checked.
f. Click **Add Users to this Share**.
   You may be prompted to add additional information for new users:

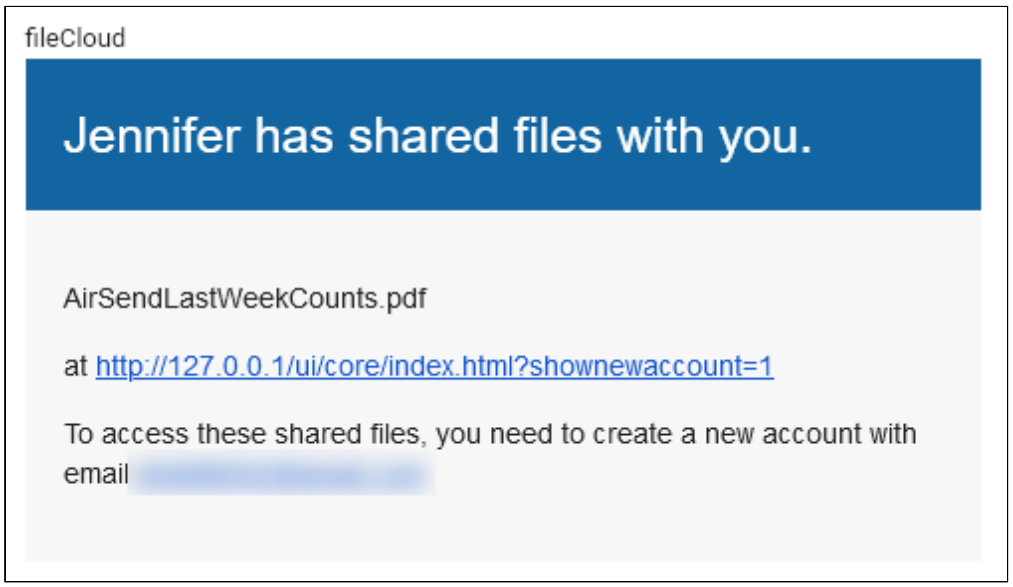


g. Enter the requested information and click **Save**, then click **Add Users to this Share** again.
   The users are added to a **Sharing Permissions** section of the **Share link** dialog box. By default the users can view and download the share.
h. Check and uncheck the **Sharing Permissions** boxes to make any changes to the permissions.
   For information about each permission, see Private Share Permissions for Folders.

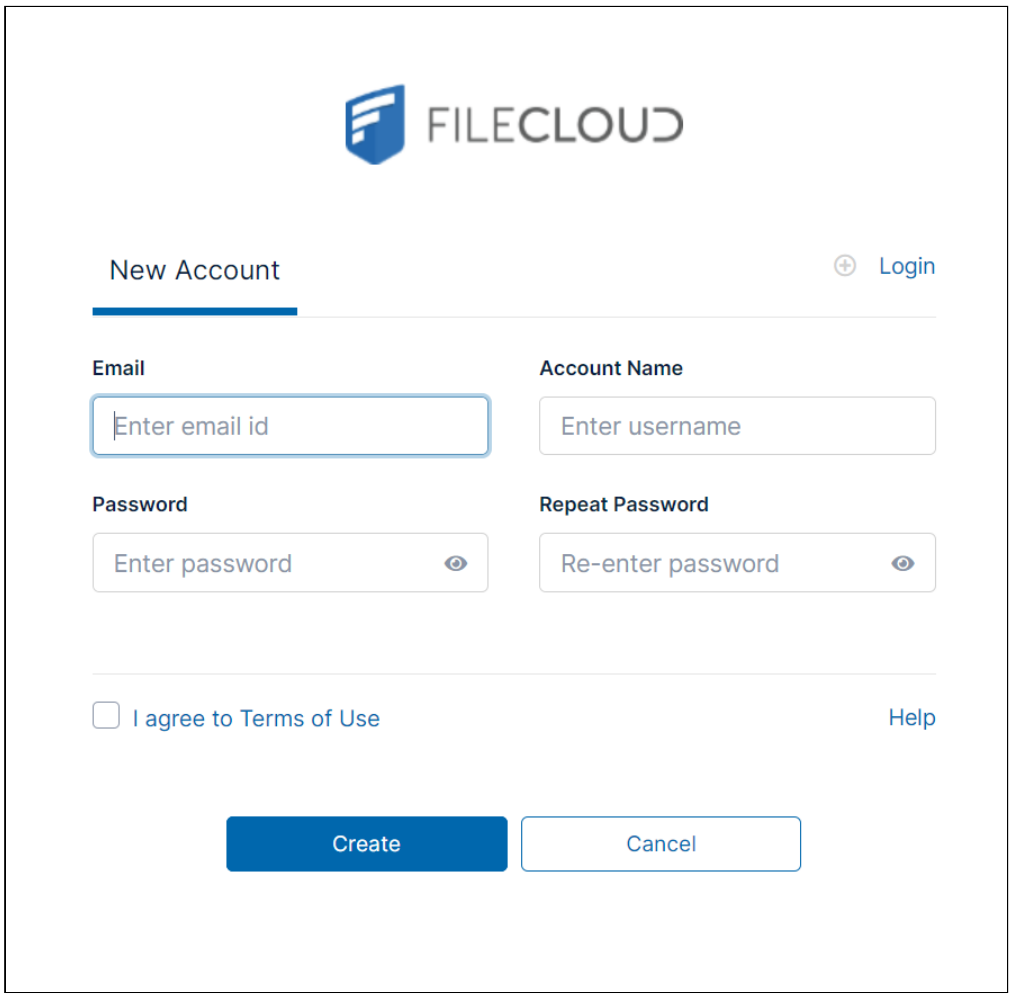


How the invited user signs up for an account

The invited user receives an email similar to:



When the user clicks the link, the following window opens:



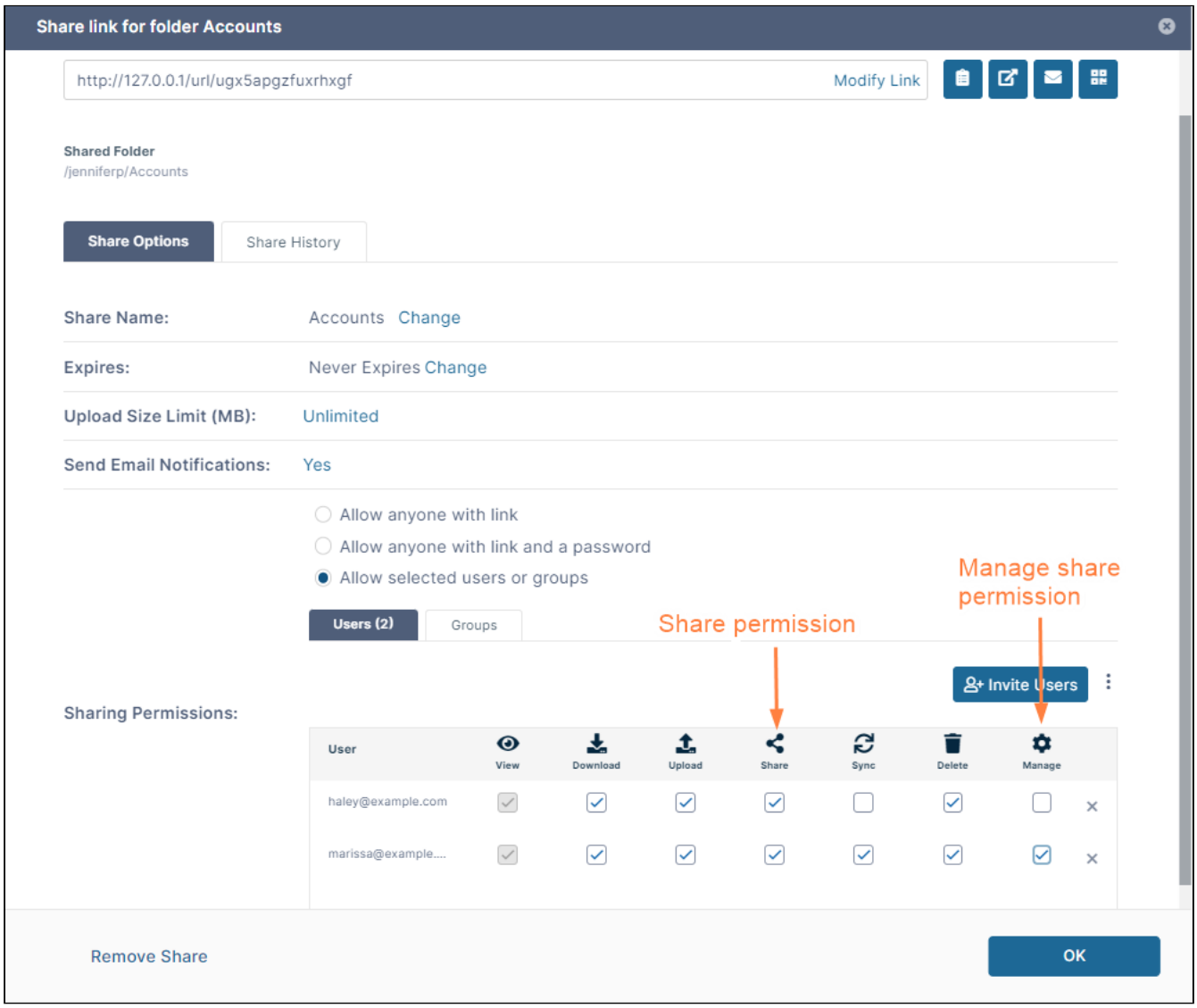
The user creates the account using the form, and can then log in to FileCloud and navigate to the Shared with Me folder to view the share.
Note: Depending on your configuration the user may be asked to respond to an email to confirm the new account before logging in.

Allow Share Members to Manage Re-Shares

> User ability to re-share and also manage subsequent folder shares that have been created from your original share is available in FileCloud version 18.2.
>
> Groups have the ability to re-share folders, but are not able to manage the folder shares.

When you share a folder privately:

- Users that you give Share access to can re-share the folder with other users.
- Users that you give Manage access to can manage the re-shares.

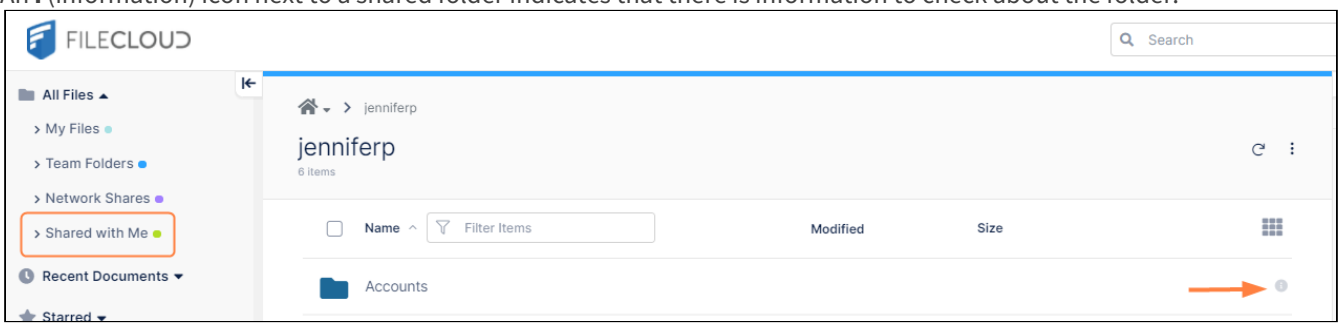


To add users to a folder share and assign permissions to them, see Share a Folder Privately.

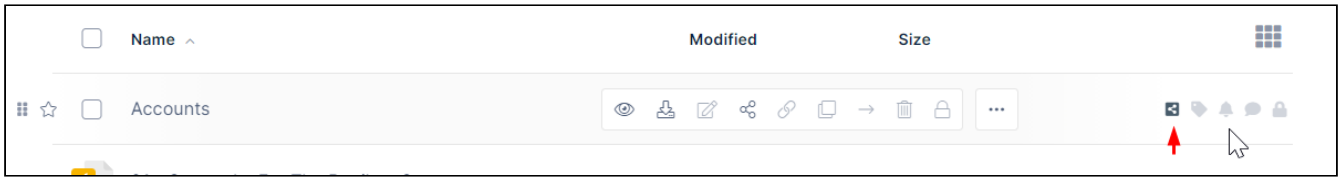
Managing Re-Shares

You can view files and folders that have been shared with you by going to the Shared with Me folder and opening the sub-folders named for share owners.

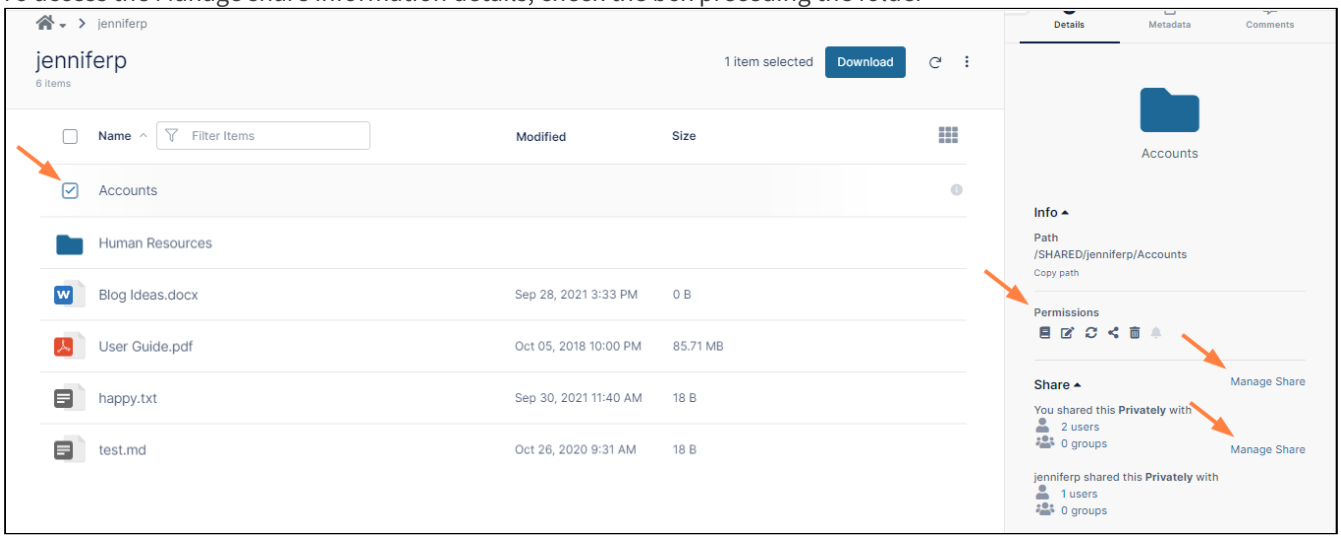
An **i** (information) icon next to a shared folder indicates that there is information to check about the folder.



Hover over the **i** icon to see symbols that indicate the type of information available. If the share icon is bolded as in the following image (a white share icon with a black background), it indicates that you have Manage permission over re-shares.

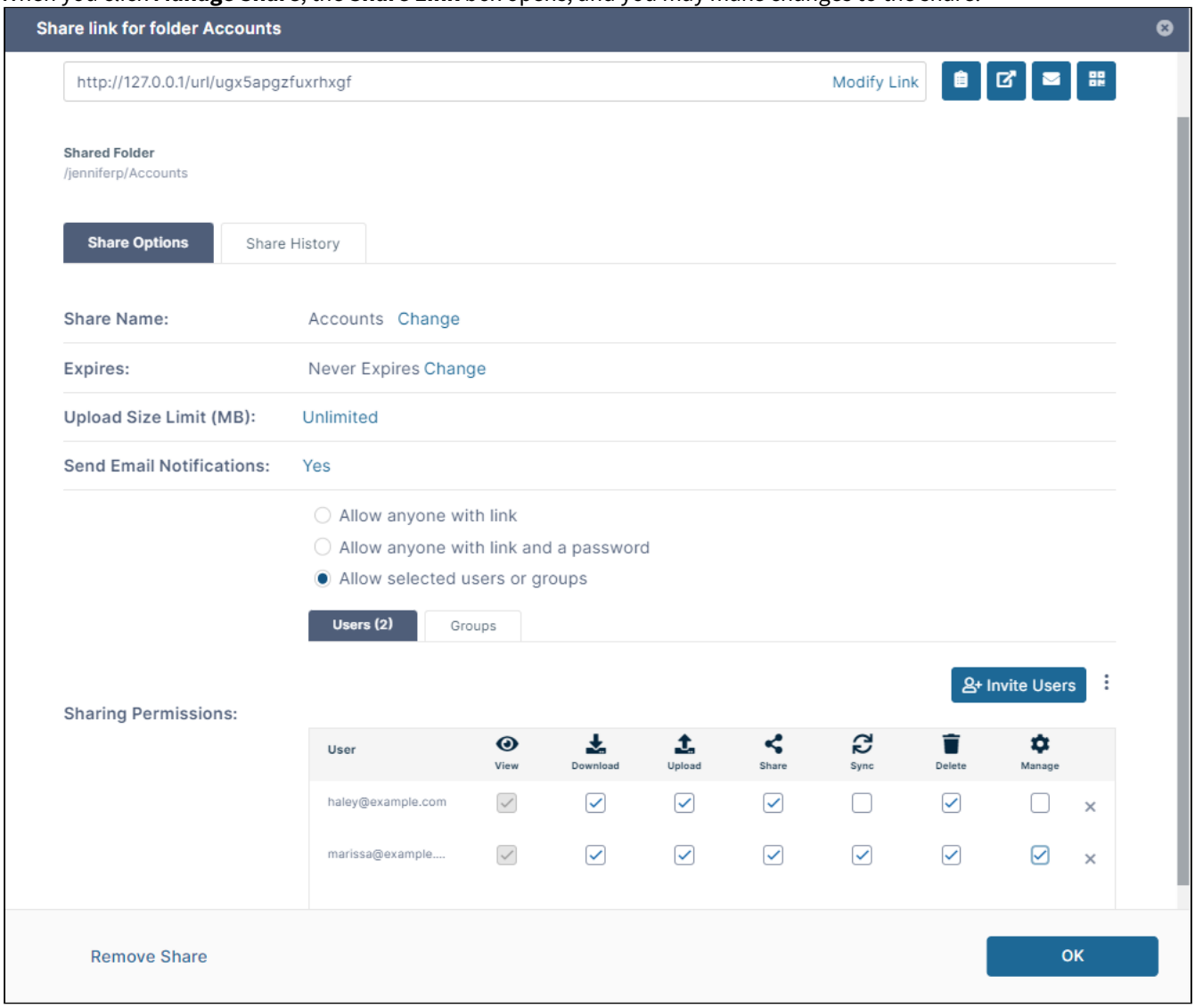


To access the Manage share information details, check the box preceding the folder



The right panel shows your permissions for the share, and since you have manage permission for the share, it displays a **Manage Share** link next to the original share and each re-share.

When you click **Manage Share**, the **Share Link** box opens, and you may make changes to the share.



Share Options for Public and Private Folders

In the User Portal, you can configure how you share a folder when:

- You first create the share using **Share Options** - this button is available in the window that opens after you hover over a folder and click the Share icon.
- After you create the share by opening it. The share opens to a window that displays the options.

Share options include:

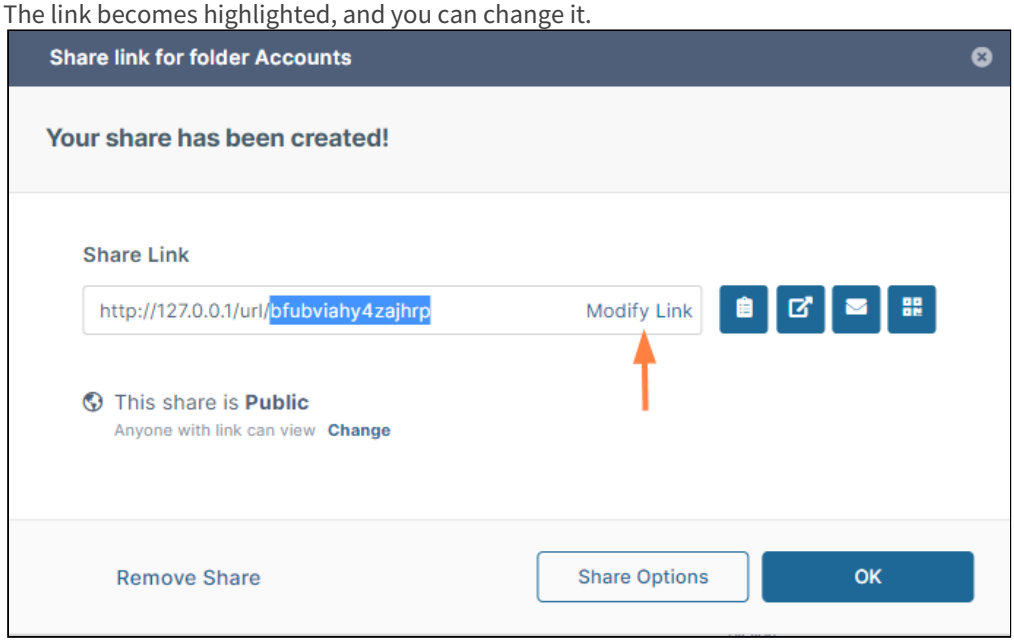
- Entering a custom share name or share link
- Setting a share expiration date
- Setting a limit on the size of files that can be uploaded to the folder (public shares with the permissions upload, view+upload, and view+download+upload shares only, and private shares)
- Disabling email notifications when a change is made to the share

- Requiring a password to access the share (public shares only)

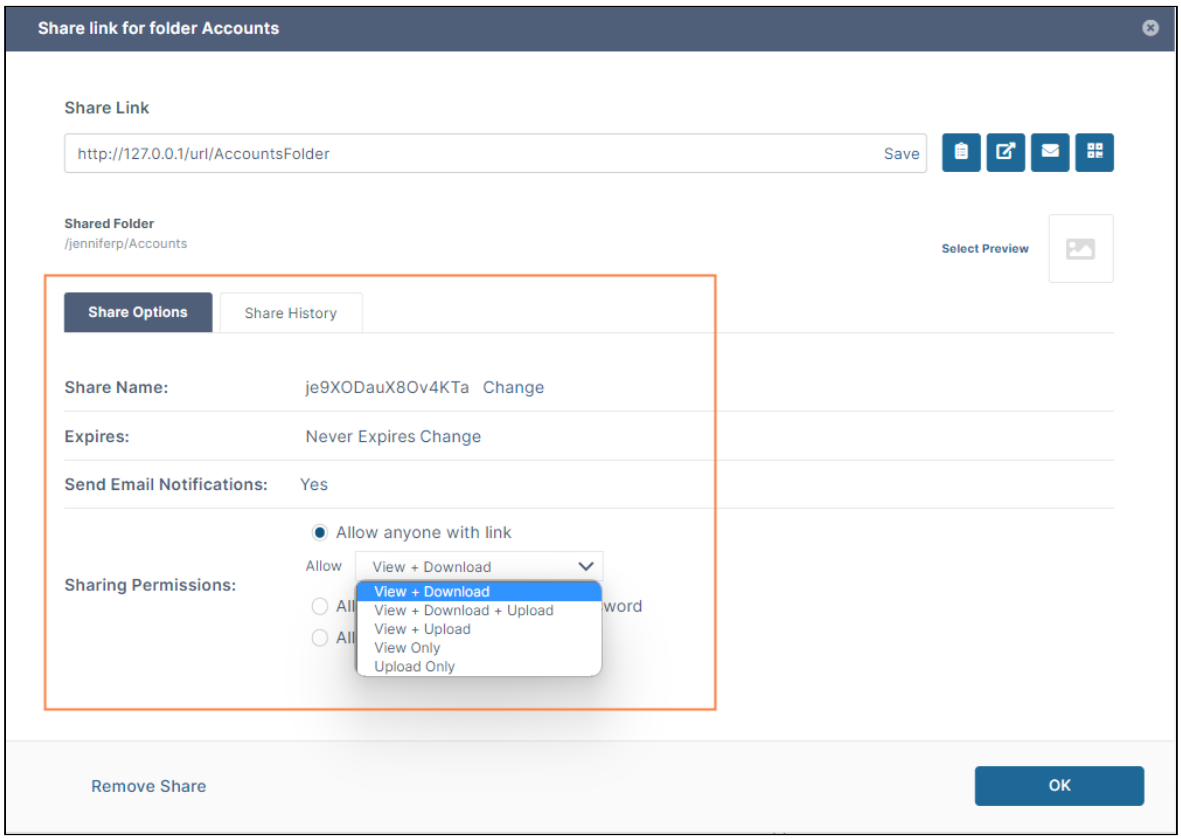
To configure the share link and share options

1. Hover over the folder and click the **Share** icon.

- If the folder is not yet being shared, the **Share Link** dialog box opens.
  If you want to change the link name to something more memorable or descriptive, click **Modify Link**. The link becomes highlighted, and you can change it.



Click **Share Options** to expand the the dialog box and display share options.



- If the file has already been shared, the expanded dialog box shown above opens immediately.

2. Change the share options. View the video below to see how to change each option.
The following table describes each choice:

Option	Settings	Description
Share name	• randomly-generated name (default) • custom name	Customize the share name if you want it to be descriptive or memorable.
Expires	• Never (default) • Expires	By default, this is set to **Never**. If you set this to **Expires**, enter a date in the future when this folder is no longer shared. When the share expires, the link becomes unusable to users but the folder is not removed or changed.

Option	Settings	Description
Upload Size Limit (MB)	• Unlimited (default) • Limited + size in MB	Use this to restrict the amount of content that can be uploaded to the folder. This appears for public shares with **View + Download + Upload**, **View + Upload**, or **Upload Only** permissions and for private shares. • **Unlimited** - allows any user to upload any amount of content into the folder. • **Limited** + size in MBs - specifies the amount of content that can be uploaded into the folder.
Send Email Notifications	• Yes (default) • No	By default, this is set to **Yes**. • If set to **Yes**, then an email notification is sent when a file is opened or downloaded for a public share.
Sharing Permissions	• Allow anyone with link (default) • Allow anyone with link and a password • Allow Selected Users or Groups	By default, this is set to **Allow anyone with link**. • If set to **Allow anyone with link and a password**, when you share this link through the FileCloud email template, the password information is given. When users click the link to access the share, they are prompted to enter the password. • The **Allow** drop-down list indicates users' permissions for the share. It appears under the options **Allow anyone with link** or **Allow anyone with link and a password** when the option is chosen. The possible choices are: • **View + Download** • **View + Download + Upload** • **View + Upload** • **View Only** • **Upload Only** Note that the **Upload Size Limit** folder option only appears if you choose **View + Download + Upload**, **View + Upload**, or **Upload Only**. For more information about these permission options, see Public Share Permissions for Folders • The third option, **Allow Selected Users or Groups**, changes the share to private. The possible permissions are **View**, **Download**, **Upload**, **Share**, **Sync**, **Delete**,and **Manage**. For more information about these permission options, see Private Share Permissions for Folders.

To save your changes, click **OK**.

Share Options Video

Play the following video to see how to set share options.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Managing Shared Files and Folders

After you create a new share, you can view details about activity on the share, update share users and their permissions, change share options, and delete the share.

When a file or folder has been shared with you, you can view it, perform any other actions permitted for the share, and leave the share.

- Edit Share Options, Share Users, and Share Permissions
- Email or Copy a Share Link
- Viewing Expired Shares
- File Change Notifications for Shares
- Viewing Existing Shares
- Deleting a share
- Share History
- Leaving a Share
- Renaming a Shared File or Folder

Edit Share Options, Share Users, and Share Permissions

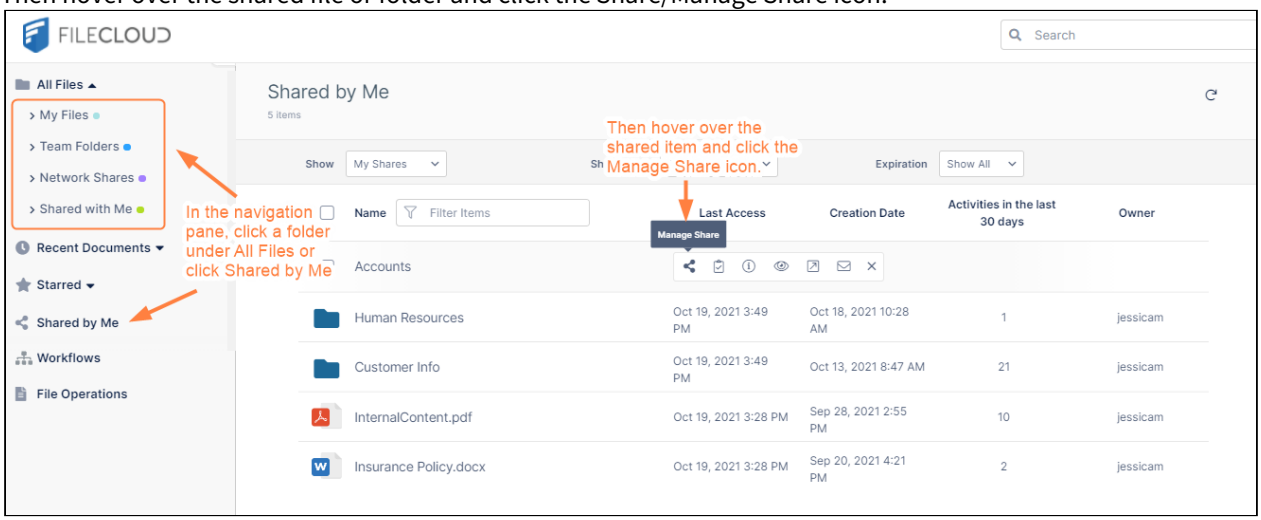
After you have create a share, you can manage the share to edit its options, change the users you have shared with, and modify their permissions.

To open a share for editing

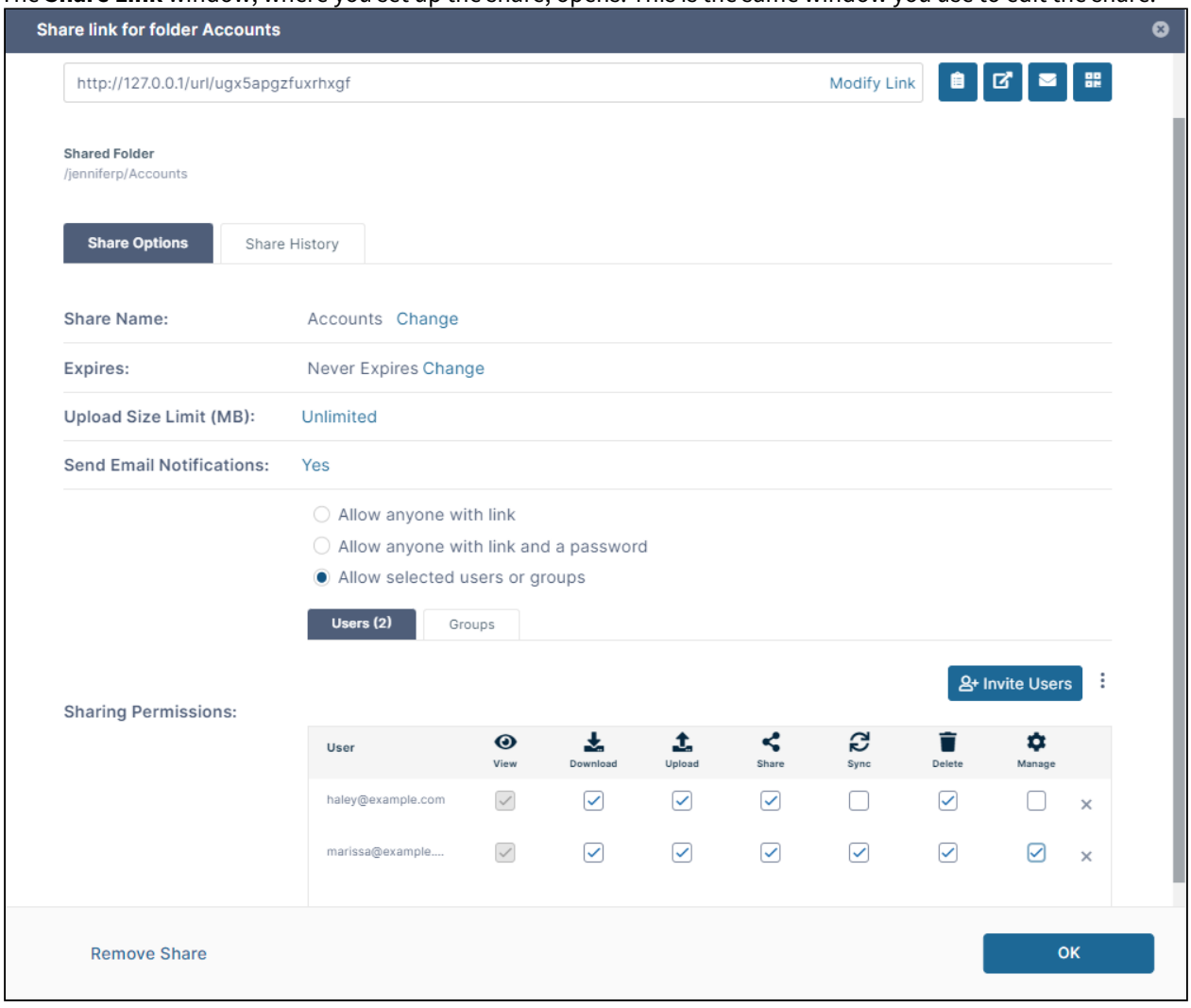
You can open a share for editing in the folder you originally shared it from (**My Files**, **Team Folders**, **Network Shares**, or **Shared with Me**) or in **Shared by Me**.

1. Select the folder from the navigation pane.

2. Then hover over the shared file or folder and click the Share/Manage Share icon.



The **Share Link** window, where you set up the share, opens. This is the same window you use to edit the share.



Edit the Share Link, Share Options, and Sharing Permissions the same way you configure them when you initially share a file or folder.

For help, see:

- Public Share Options for Files
- Public Share Permissions for Folders
- Private Share Options for Files
- Private Share Permissions for Files
- Private Share Permissions for Folders

Email or Copy a Share Link

⚠ Beginning with FileCloud 23.1, users creating a share can download a QR code with the share link.

ⓘ The **Copy to Clipboard** button is available in FileCloud version 19.1 and later.

After you create a share, you can return to the **Share Link** window to email, copy, or download the share link, or to open the share.

The **Share Link** window displays the share link with buttons next to it at the top of the window:

Copy link to clipboard

Click the **Copy Link to Clipboard** button to copy the link so you can include it in a file or email.

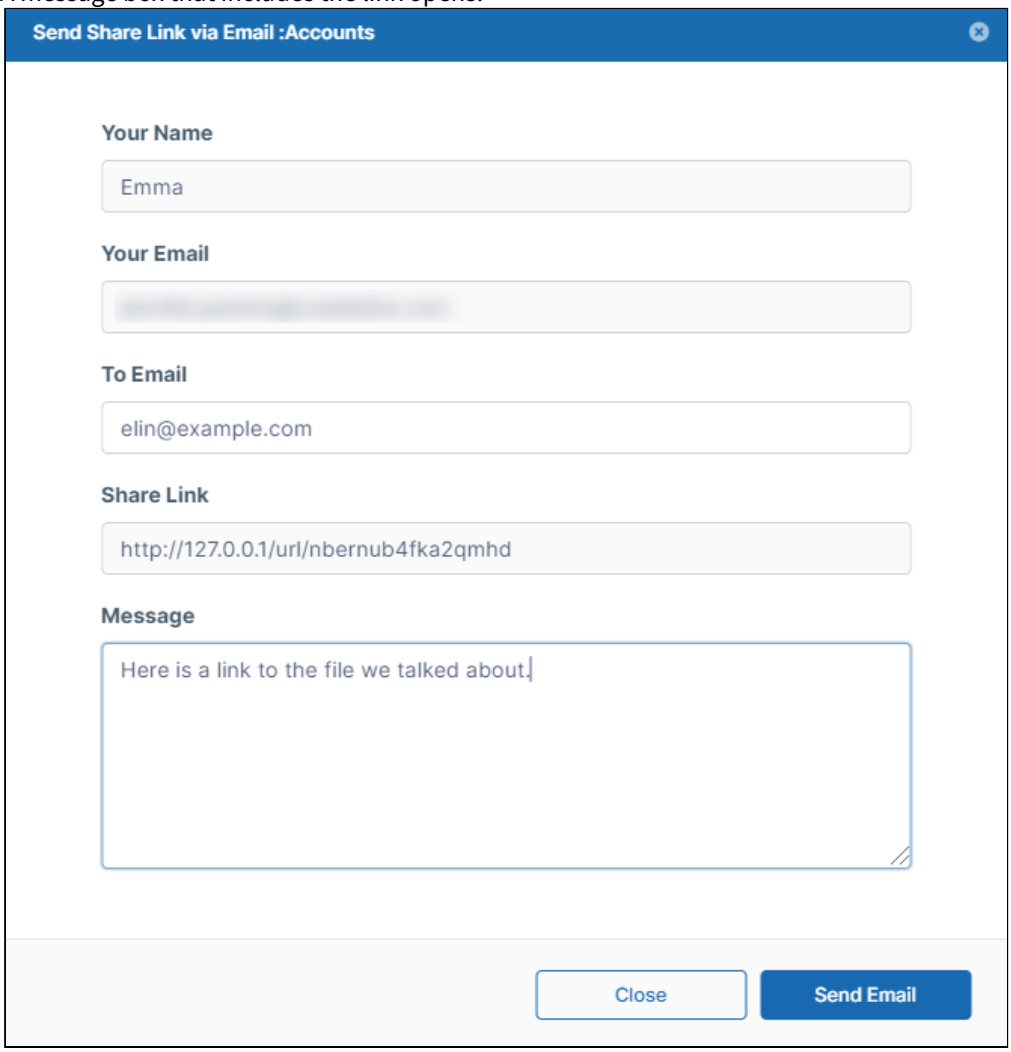
Open link in new window

Click **Open Link in New Window** to see what users see when they click on the link.

Email link

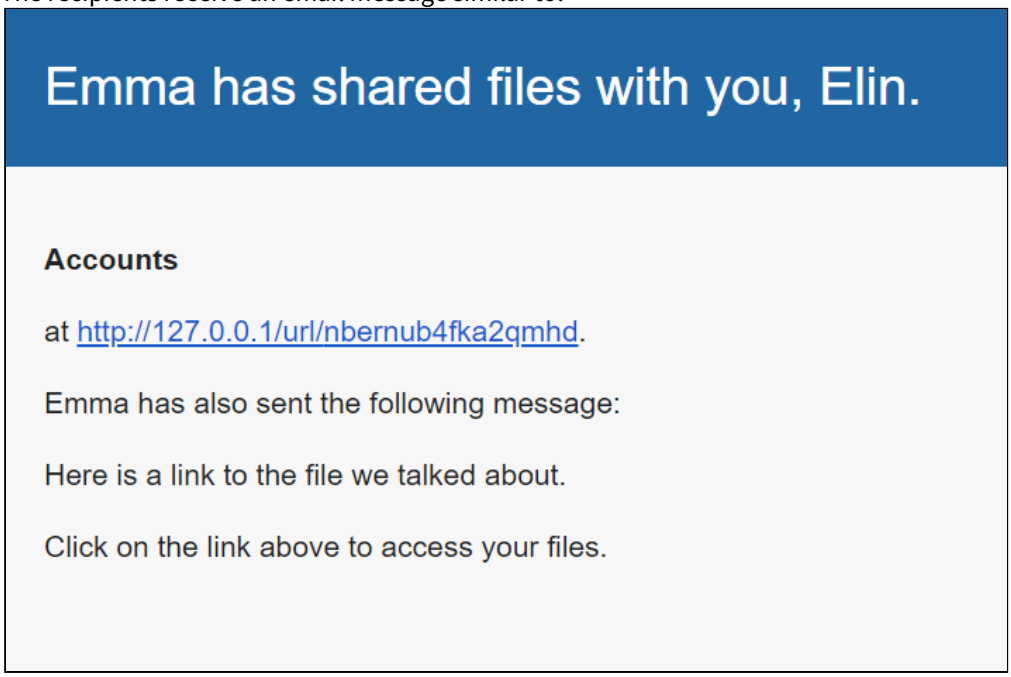
You can reopen the **Share Link** window and manually send an email to a user with the share link. This may be useful if you want to send them the link for a public share or if they have lost the link you originally sent them.

1. Click the **Email Link** button.
   A message box that includes the link opens:



2. In **To Email** enter the email addresses of the recipients
3. In **Message**,enter a message.

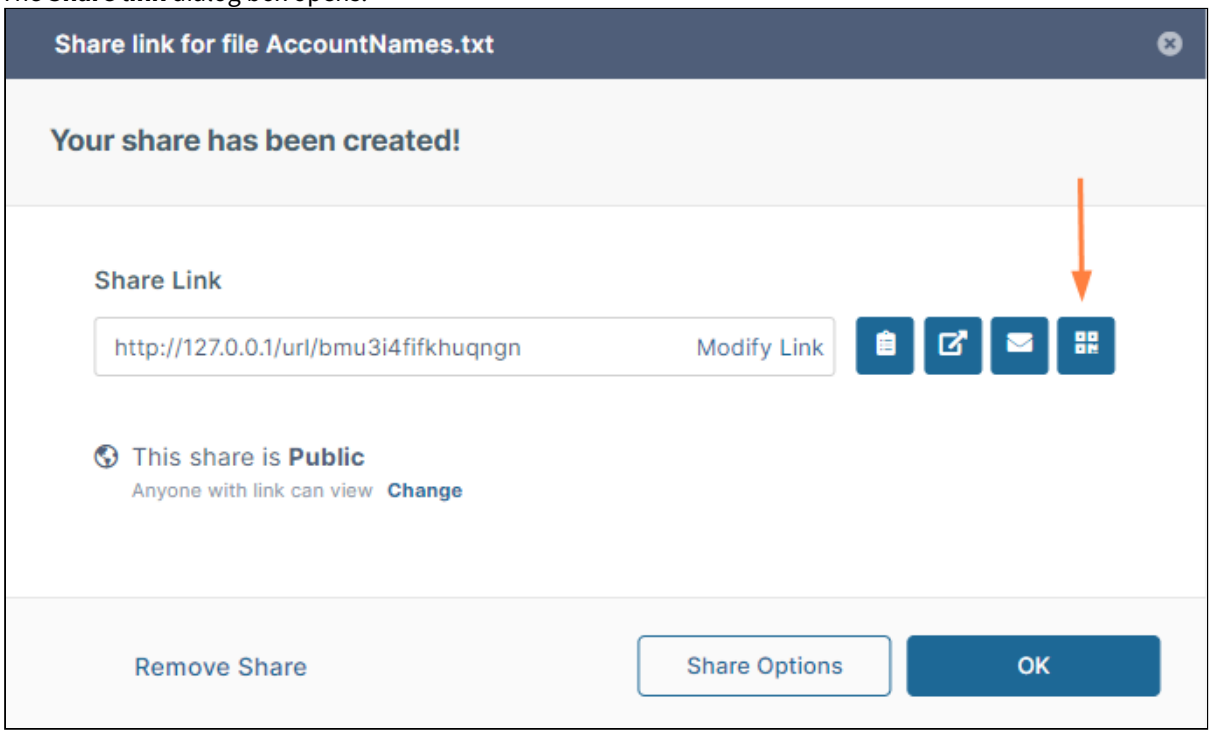
4. Click **Send Email**.
   The recipients receive an email message similar to:



Download QR code

You can download a QR code that links to the share, and then include it in a text or email that you send to a share recipient. The share recipient can then scan the code to be redirected to the share.

1. In the user portal, hover over the file or folder and click the **Share** icon.
   The **Share link** dialog box opens.



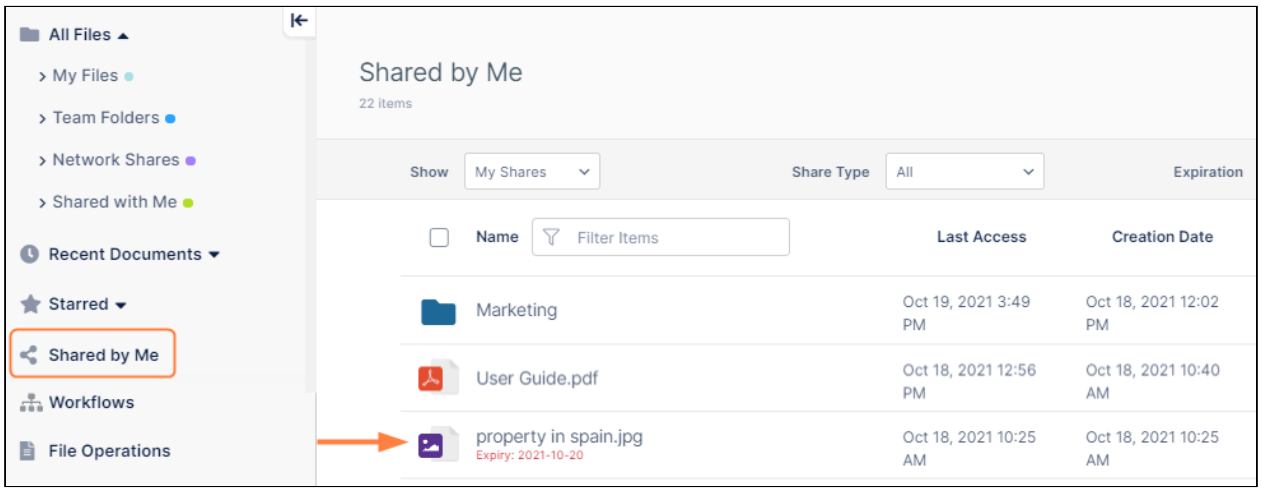
2. Click the **Download QR Code** button.
   The code is downloaded as a .png file that you can copy into an email or text. The recipient can scan the code to open the share.

Viewing Expired Shares

You can see which of your shares have expired in **Shared by Me**.

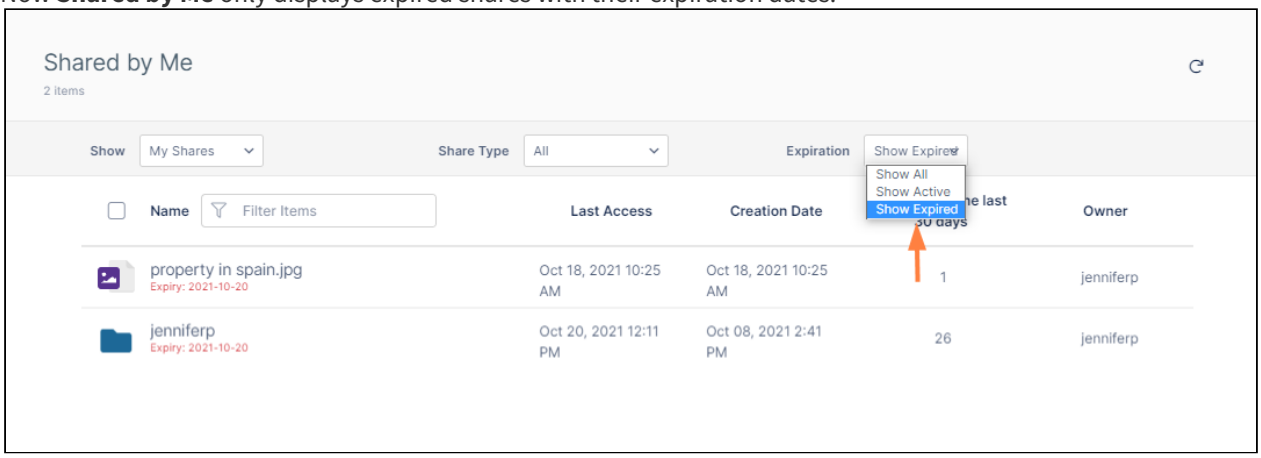
To see which of your shares are expired

1. In the navigation panel, click **Shared by Me**.
   The screen displays a list of the files and folders shared by you. Below each expired share is a note giving the expiration date:



To only view your expired shares

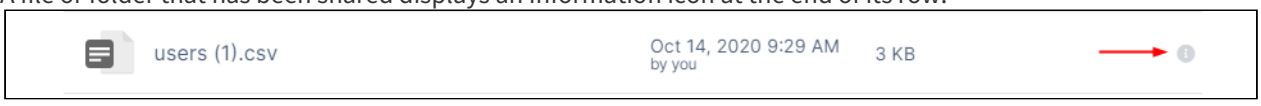
1. In the navigation panel, click **Shared by Me**.
   The screen displays a list of the files and folders shared by you.
2. In the **Expiration** drop-down list at the top of the screen choose **Show Expired**.
   Now **Shared by Me** only displays expired shares with their expiration dates.



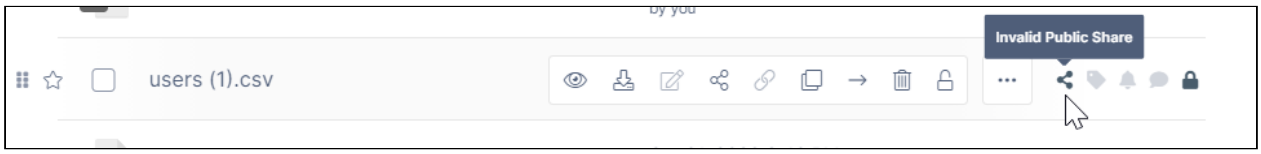
To check if a share in an All Files folder is expired

If you are working in **My Files**, **Team Folders**, **Network Shares** or **Shared with Me** you can check if a share is expired by hovering over the Information icon.

1. In the navigation pane, click the folder.
   A file or folder that has been shared displays an Information icon at the end of its row.



2. Hover over the file or folder to expand the Info icon, then hover over the Share icon.
   If the tooltip **Invalid Public Share** appears, the share has expired.



File Change Notifications for Shares

You automatically receive notifications through email when shares are added, updated or deleted unless you or your administrator has disabled these notifications.

For information about enabling and disabling notifications in general, see the topics in Notifications.

How Do File Change Notifications Work for Shares?

Any change made by a user to a shared file or folder will trigger email notifications to all users that the file or folder has been shared with as well as the owner of the share.

Users also receive email notifications when a subfolder or file within a shared folder has file changes.

All file change notifications are consolidated and emails are sent by FileCloud at regular notification frequency (15 minutes, 1 hour, 1 day etc) as set by your FileCloud administrator.

Notifications are supported for the following actions apply to shared files and folders and files and folders in shared folders.:

- Add file or folder
- Delete file or folder
- Upload file or folder
- Rename file or folder
- Download file or folder
- Share (or reshare) file or folder
- Preview file
- Lock file or folder
- Unlock file or folder

Disable File Change Notifications for a Specific Share

File change notifications are enabled by default for all users and all folders. However, email notifications can be disabled by administrators or users.

If you are an administrator, see Notifications for File Changes for information about disabling notifications.

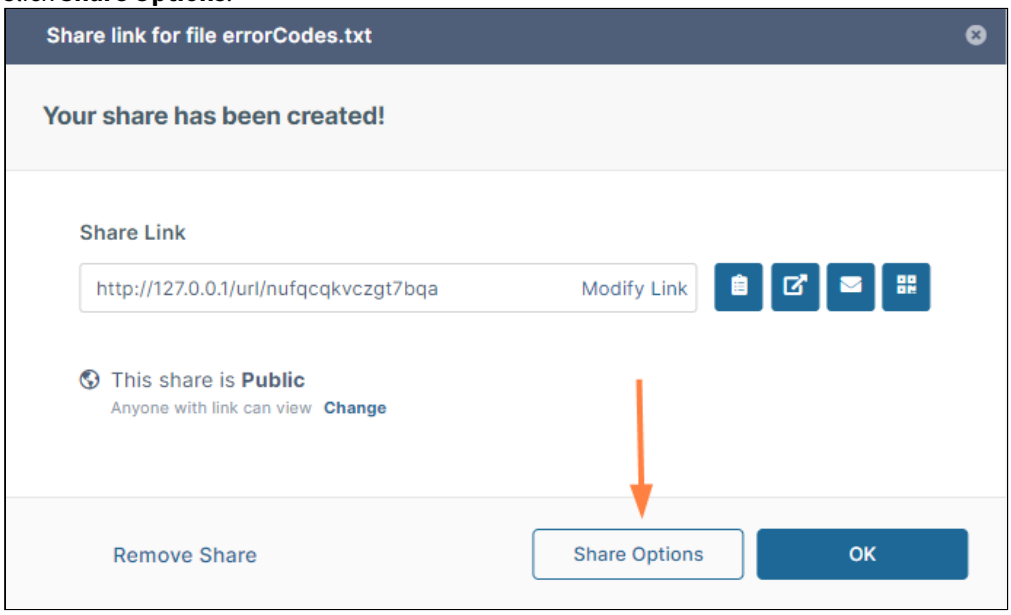
Users can selectively disable notifications for a shared file or folder when creating the share or later, by editing the share.

Disable file change notifications when creating a new share

When a share is created, file change notifications can be be disabled for the share.
Once disabled, users having access to that share will not receive any file change notifications related to the share.

1. Create the share by hovering over the file or folder and clicking the **Share** icon.
   The **Share Link** dialog box opens.

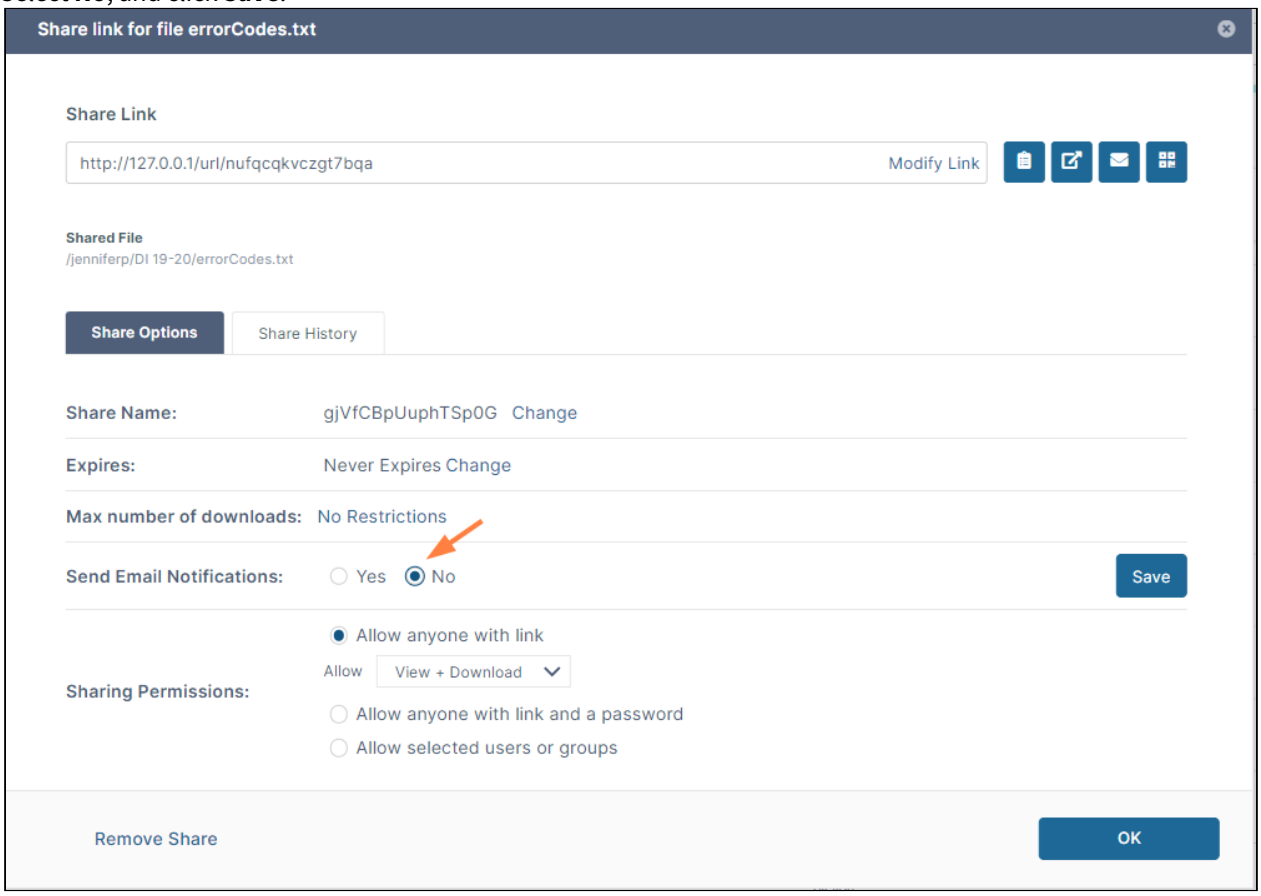
2. Click **Share Options**.



The Share Link dialog box expands.
On the **Share Options** tab, **Yes** appears by default next to **Send Email Notifications.**

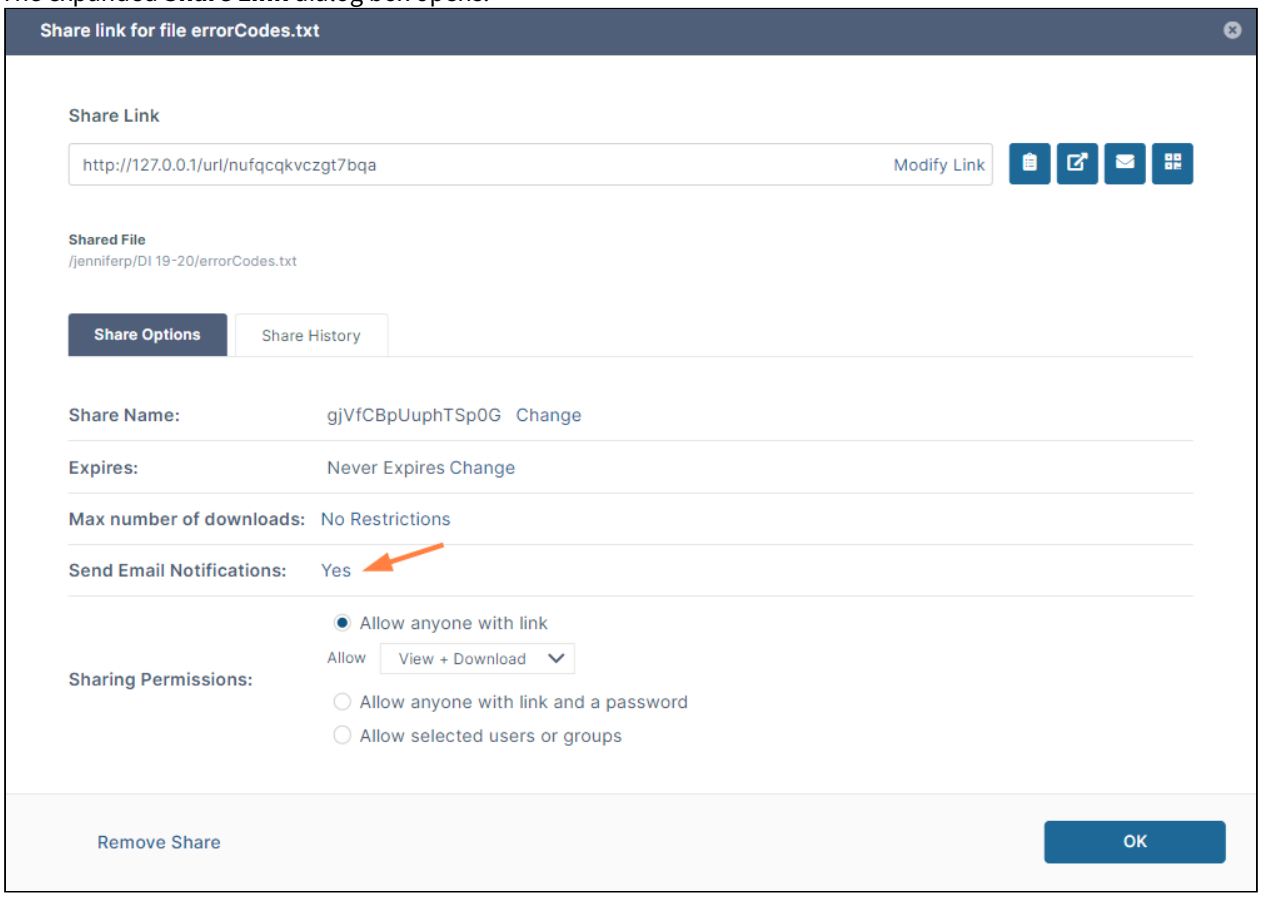
3. Click **Yes**.
Yes and **No** options appear.

4. Select **No**, and click **Save**.



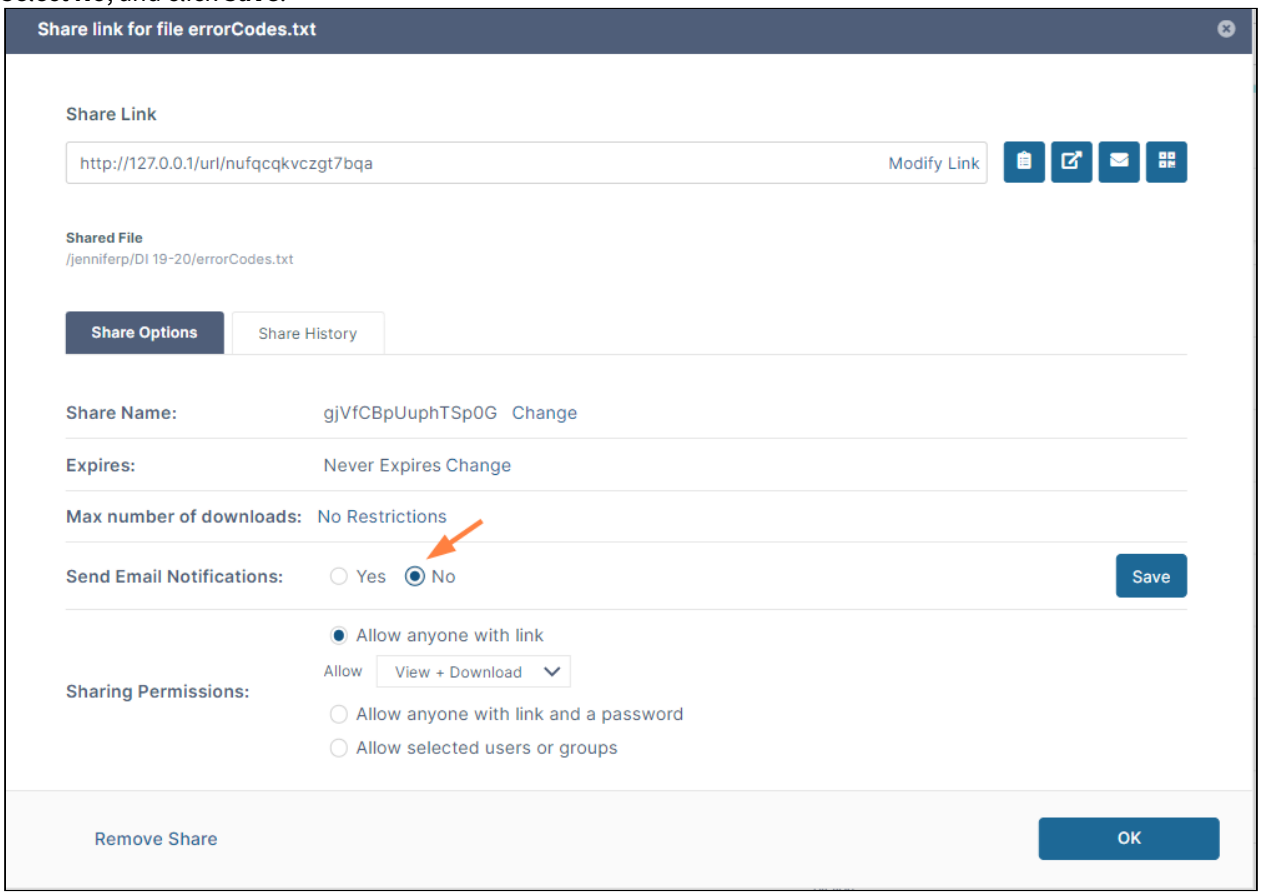
Disable file change email notifications for existing shares created by you

1. Hover over the shared file or folder and click the **Share** icon.
   The expanded **Share Link** dialog box opens.



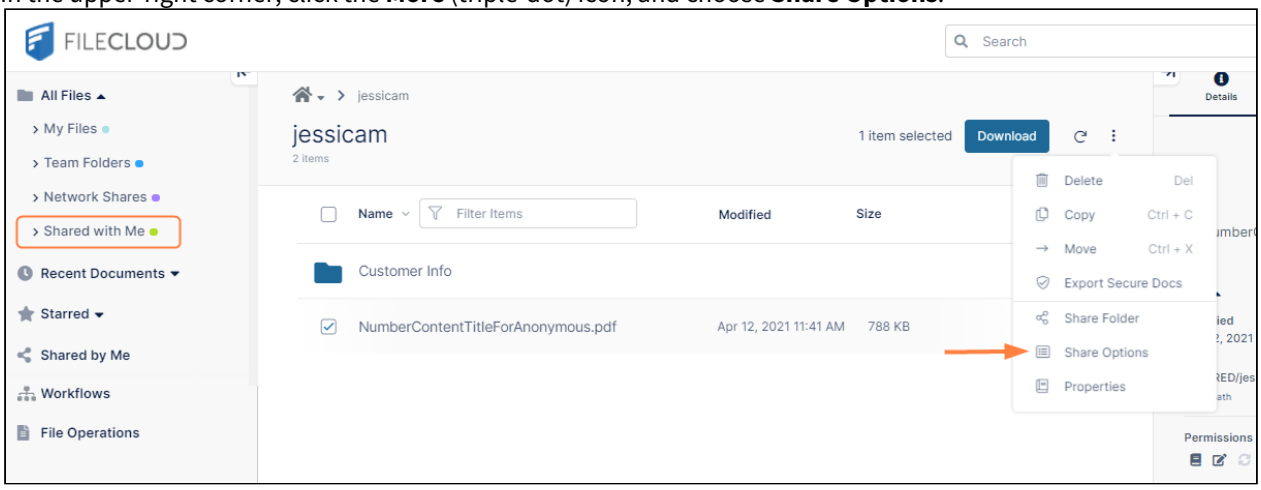
2. On the **Share Options tab**, click **Yes** next to **Send Email Notifications** to display the **Yes** and **No** options.

3. Select **No**, and click **Save**.



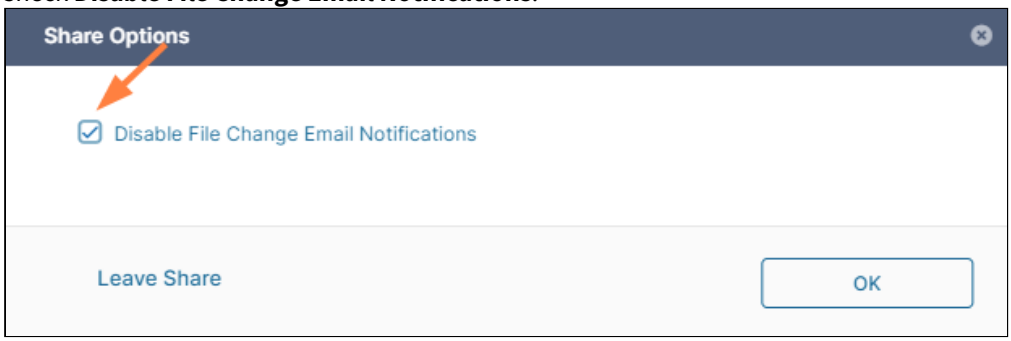
Disable file change email notifications for files and folders shared with you

1. Open the **Shared with Me** folder.
2. Navigate to and check the box for the share.
3. In the upper-right corner, click the **More** (triple-dot) icon, and choose **Share Options**.



The **Share Options** dialog box opens.

4. Check **Disable File Change Email Notifications**.



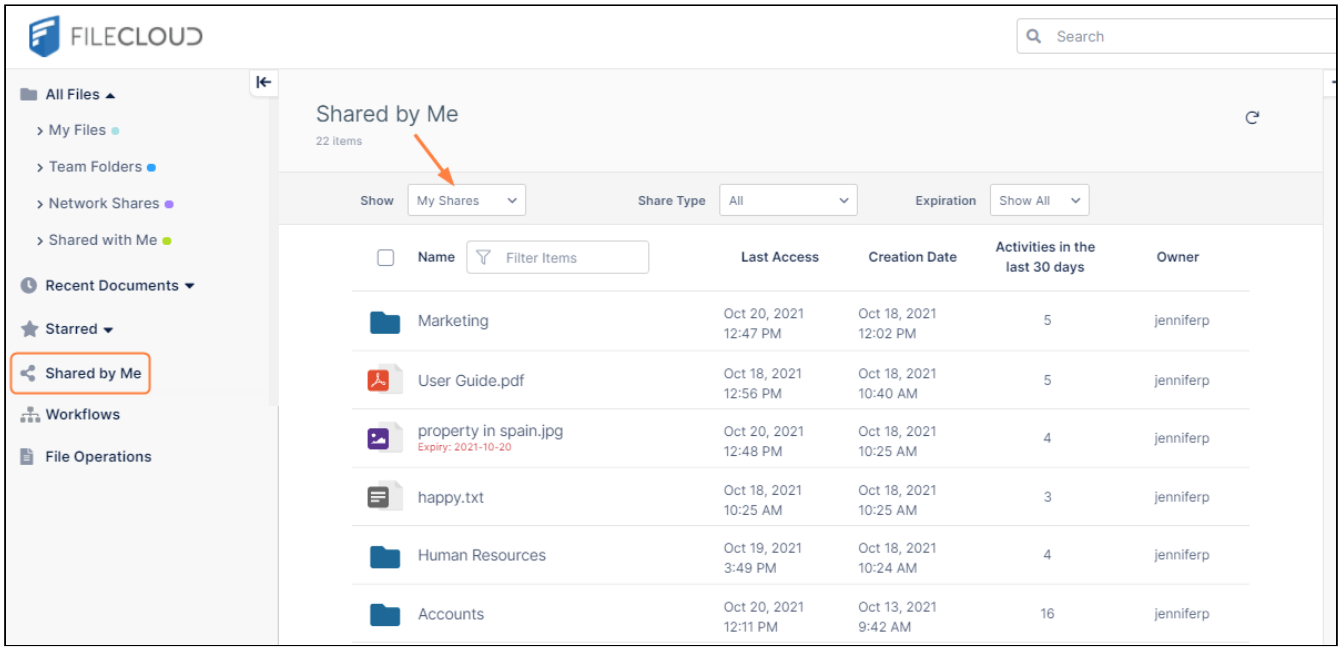
5. Click **OK**.

Viewing Existing Shares

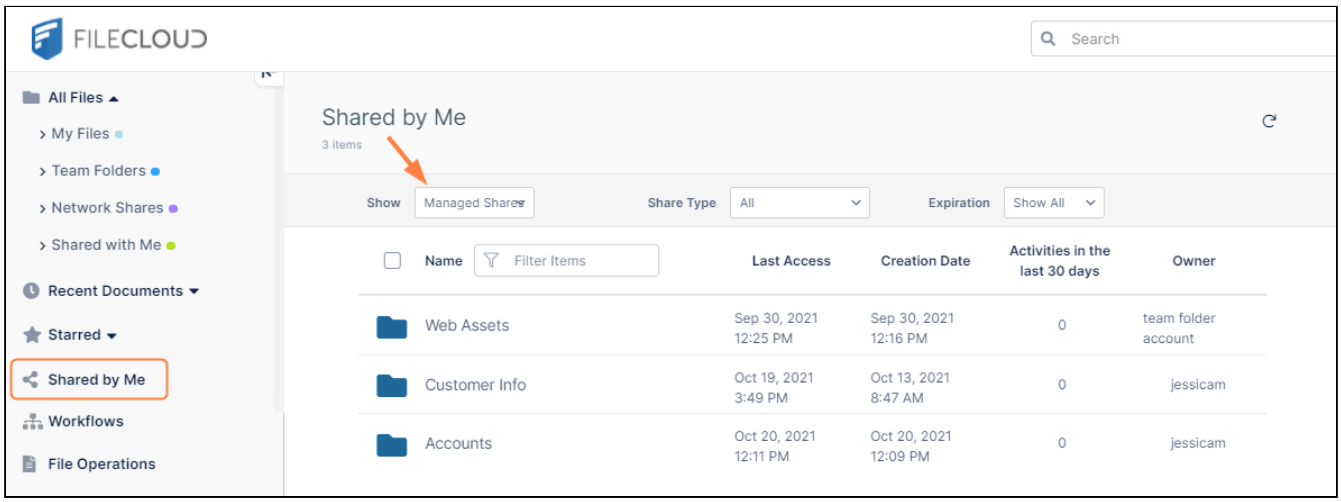
In the navigation panel, click **Shared by Me** to see a list of all files and folders that you have shared. You can also view a list of your managed shares. Managed shares are folder shares that you have been given access to manage.

View My Shares and Managed Shares

By default **Shared by Me** displays files and folders you have shared (the **Show** drop-down list displays **My Shares**):



In the **Show** drop-down list, choose **Managed Shares** to view a list of shares you can manage.



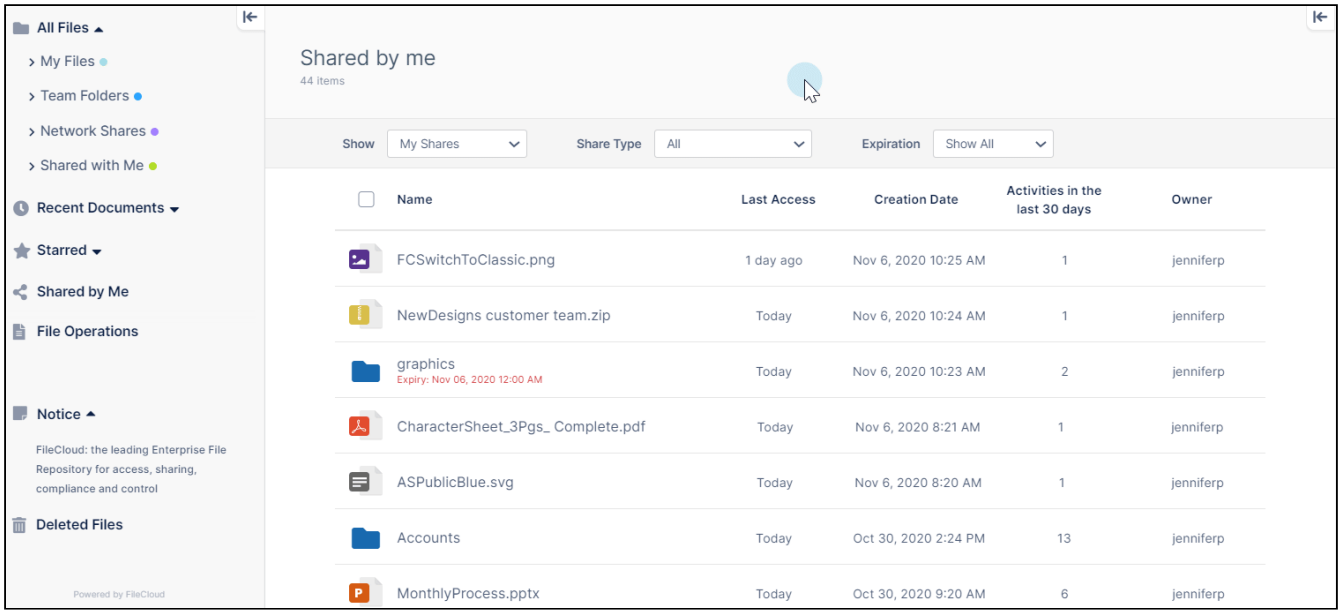
Filter shares by share type and expiration date

The **Share Type** drop-down list gives you options to view shares by the following categories:

- All
- Public
- Private
- Password Protected.

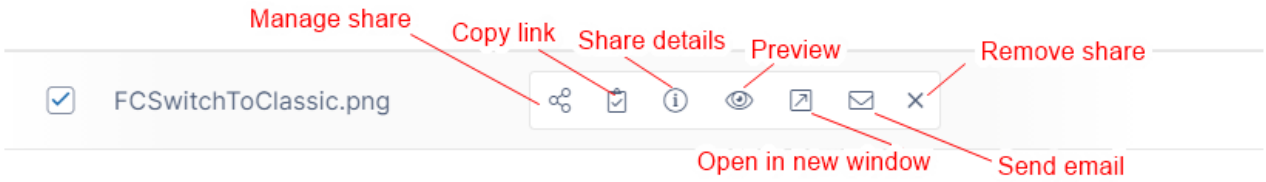
The **Expiration** drop-down list gives you options to view shares by expiration status:

- Show All
- Show Active
- Show Expired

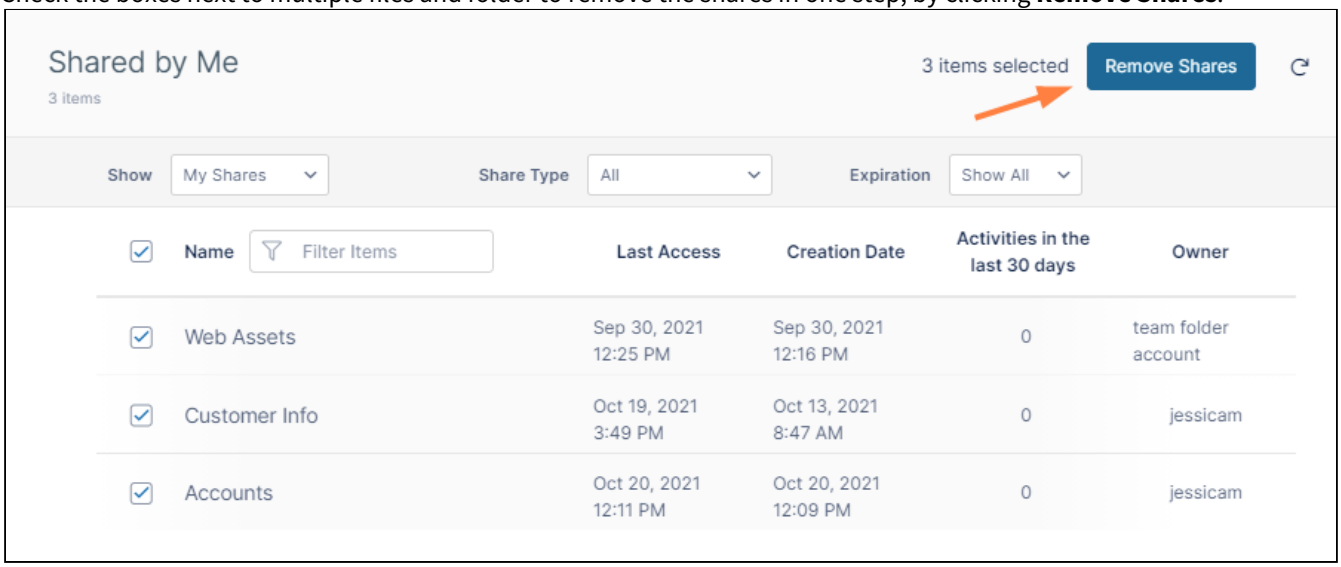


Share Actions

In **Shared by Me**, when you hover over a share, icons for actions that you can perform appear. Click any of the icons to perform its action.



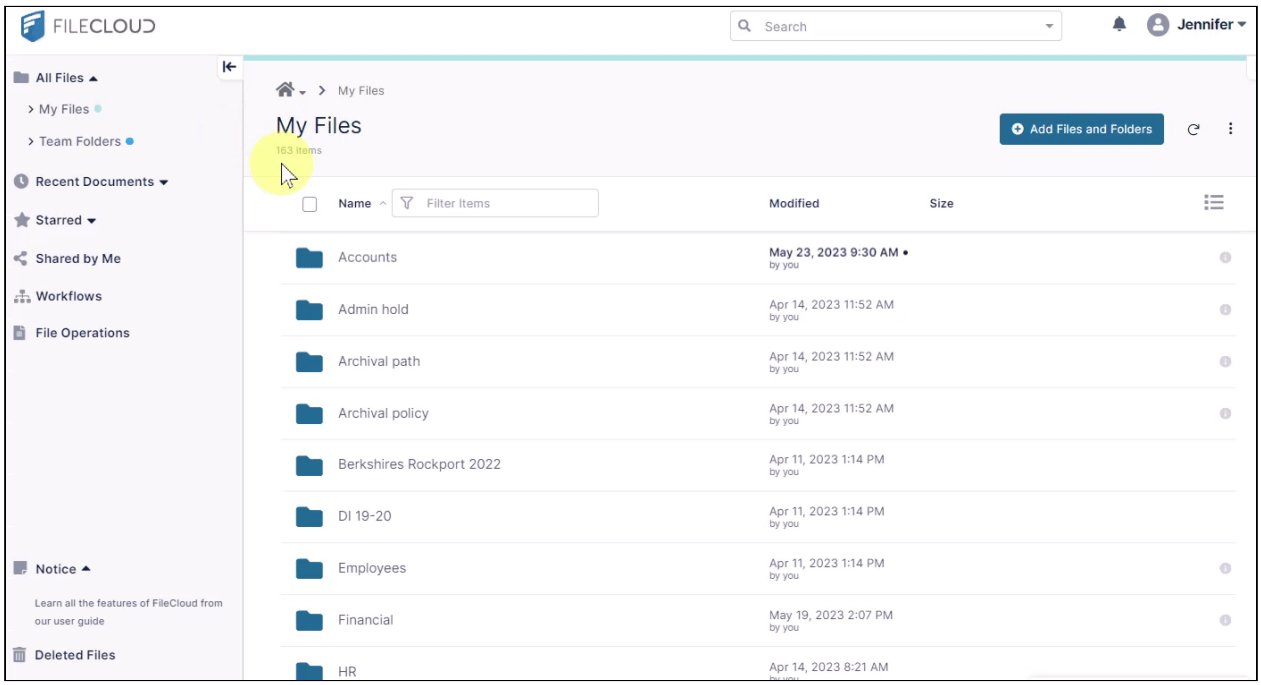
Check the boxes next to multiple files and folder to remove the shares in one step, by clicking **Remove Shares**.



Deleting a share

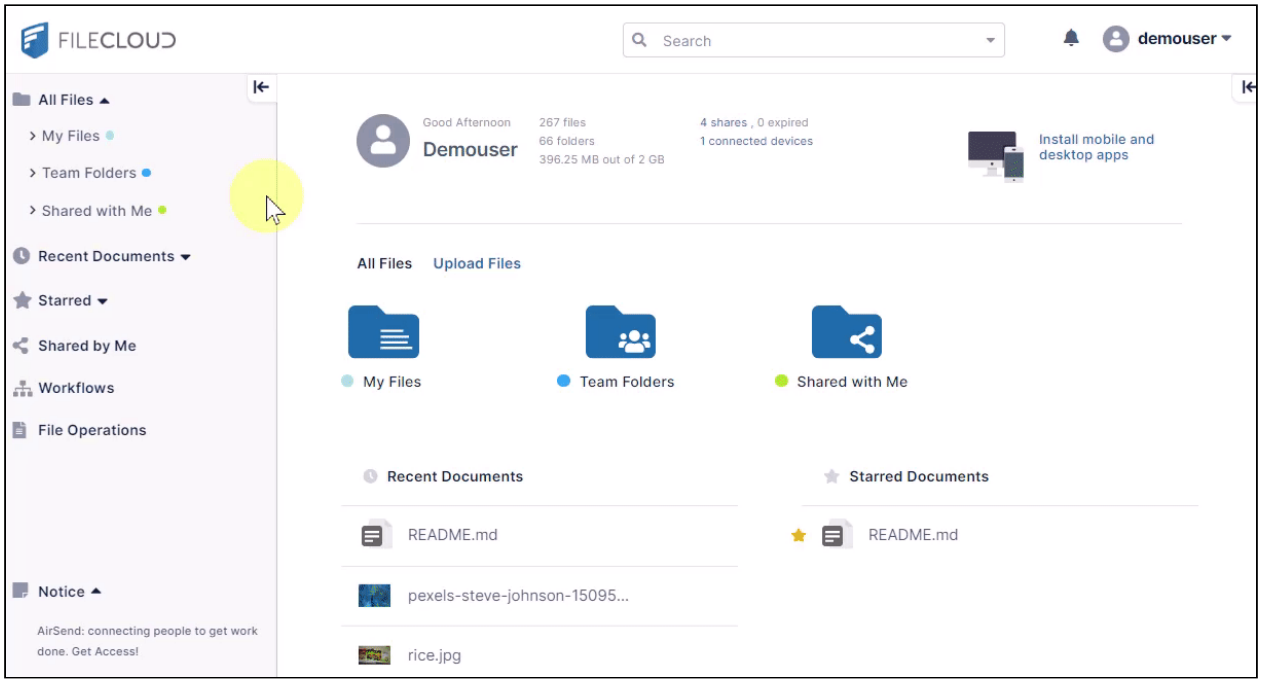
To remove a share from the original shared file or folder

1. Hover over the shared file or folder and click the **Share** icon.
   The **Share Link** dialog box opens.
2. In the lower-left of the dialog box, click **Remove Share**.
3. Click **Remove** in the confirmation dialog box.
   The share is removed.



To remove a share from the **Shared by Me** folder

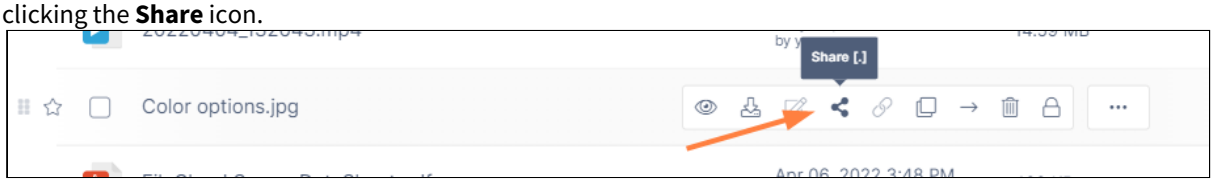
1. In the FileCloud navigation pane, click **Shared by Me**.
   The files and folders shared by you are listed in the main section of the screen.
2. Hover over the shared file or folder and click the **x**.
3. Click **Remove** in the confirmation dialog box.
   The share is removed.



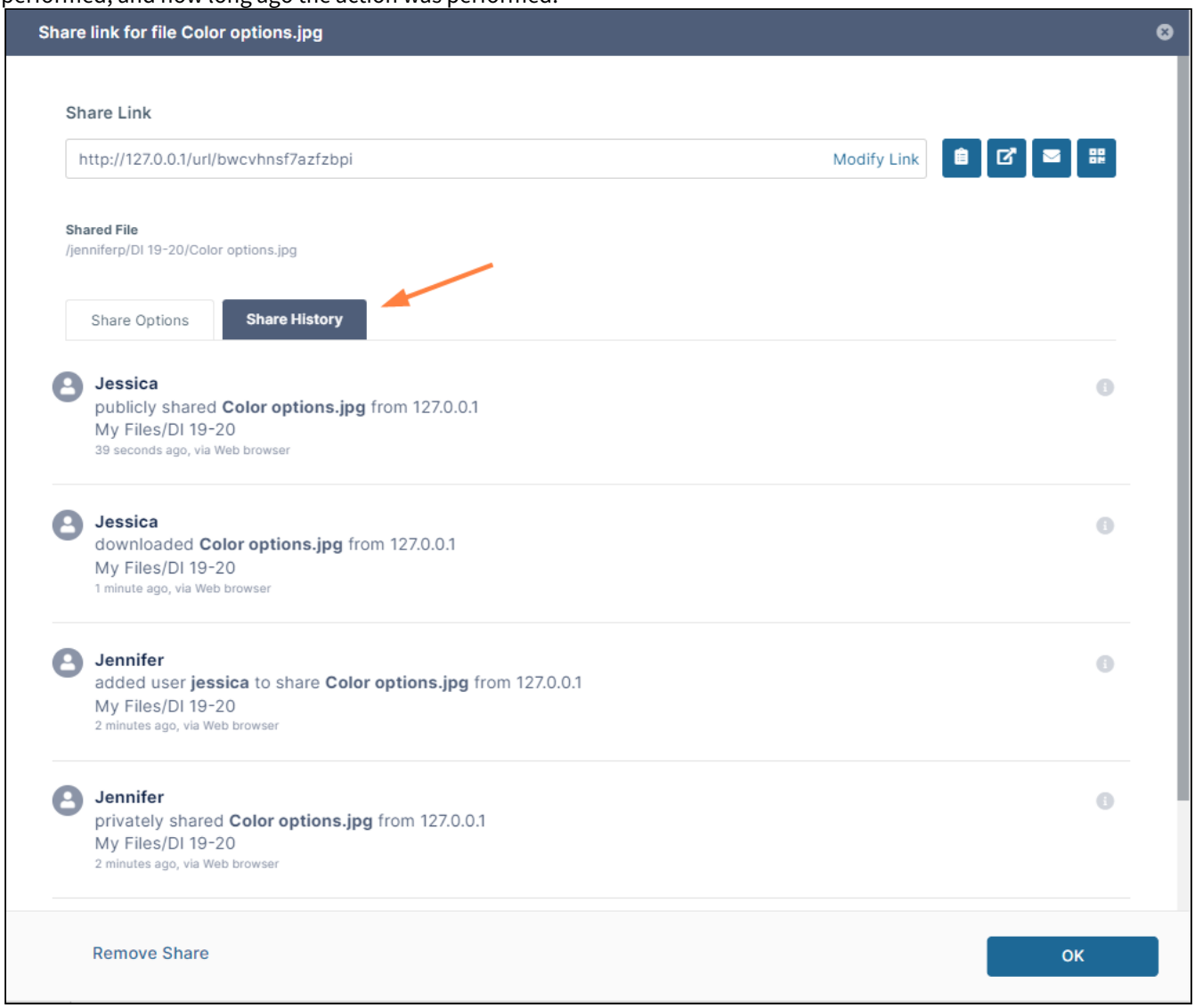
Share History

Viewing share history

Access the history of the activities performed on a share by navigating to the share in its folder, hovering over it and clicking the **Share** icon.



This opens the **Share Link** window. To view a list of actions on the share, click the **Share History** tab.
Each action is listed with the name of the user who performed the action (if known), the location where the action was performed, and how long ago the action was performed.



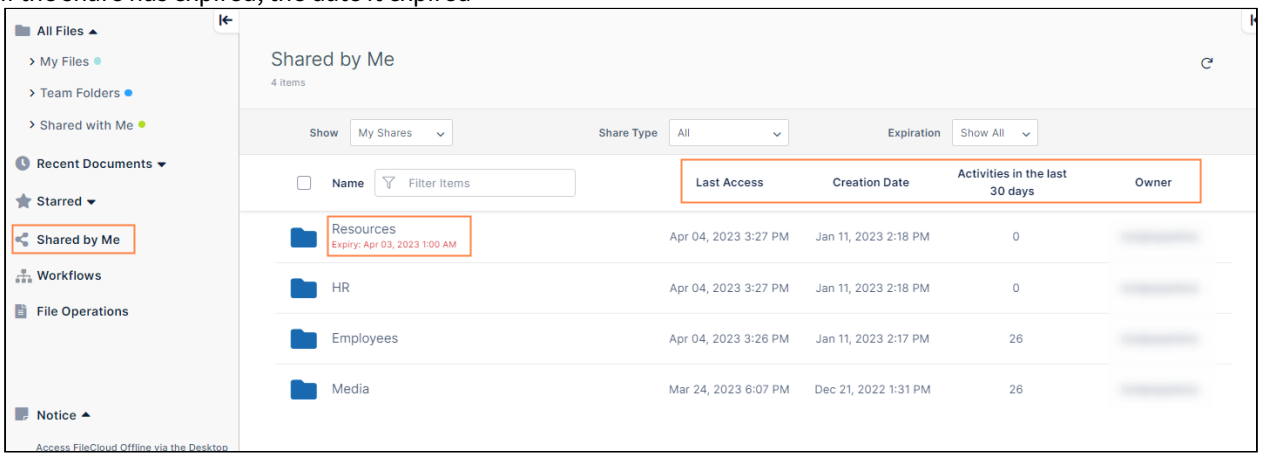
Share History displays the following actions on a shared Item:

- Add file or folder to folder
- Delete file or folder from folder
- Download
- Rename
- Lock
- Unlock
- Public share date
- Private share date
- Email share link
- Users added to the share
- Users removed from the share

Viewing share history details in Shared by Me

Viewing share history details from the **Shared By Me** folder is useful because the screen provides a list of all files and folders that you have shared along with the following information:

- how many activities have been performed on each share in the last 30 days
- the date the share was created
- the date the share was last accessed
- the share owner
- if the share has expired, the date it expired

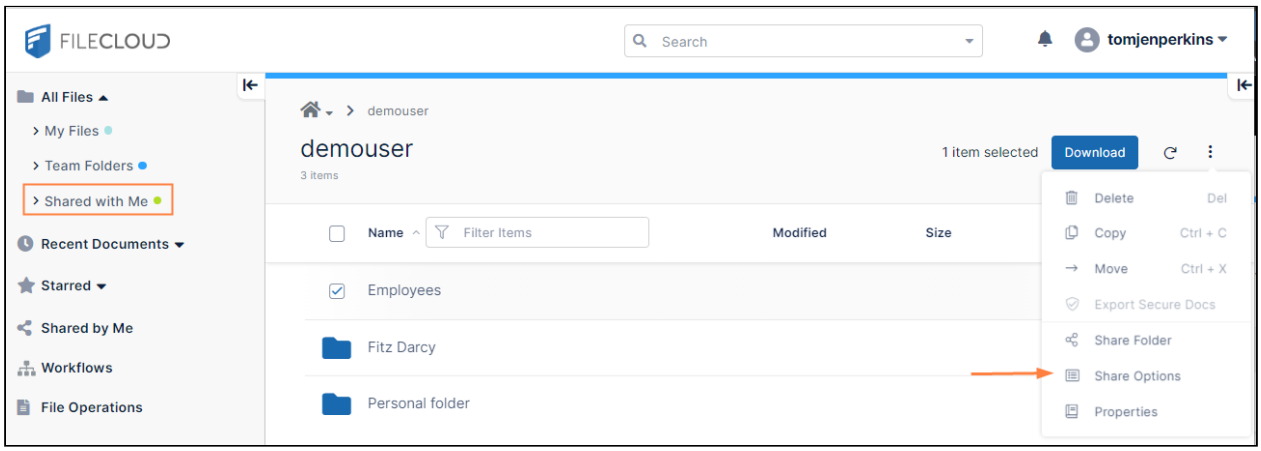


Leaving a Share

If you no longer want access to a file shared with you, you can leave the share.

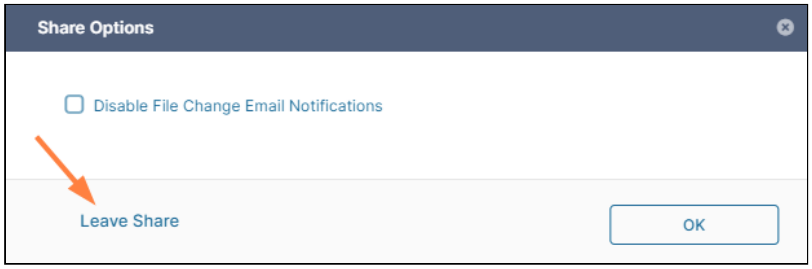
To leave a share:

1. Open the **Shared with Me** folder, and navigate to the share.
2. Check the box for the share.
3. In the upper-right corner, click the **More** (triple-dot) icon, and choose **Share Options**.



The **Share Options** dialog box opens.

4. Click **Leave Share**.



5. Click **Yes** in the confirmation box.
   The dialog box closes and the share no longer appears.

Renaming a Shared File or Folder

Private shares are named after the file or folder shared. Therefore, when you rename a privately shared item, if you don't change the share name as well as the file or folder name, they will no longer match, which could cause confusion.

To avoid this, FileCloud prompts you to change the share name when you change the name of a file or folder that is shared (this is true even the share name that doesn't match the file or folder name, which is the default case for public shares).

The following video shows us a file named **tasks.txt** with a share name that is also **tasks.txt**. When the user begins to rename the file, the prompt to rename the share with the same name appears. The user accepts the prompt, and renames the file **actions.txt**. When the share is opened, we see that the share name is also **actions.txt.**

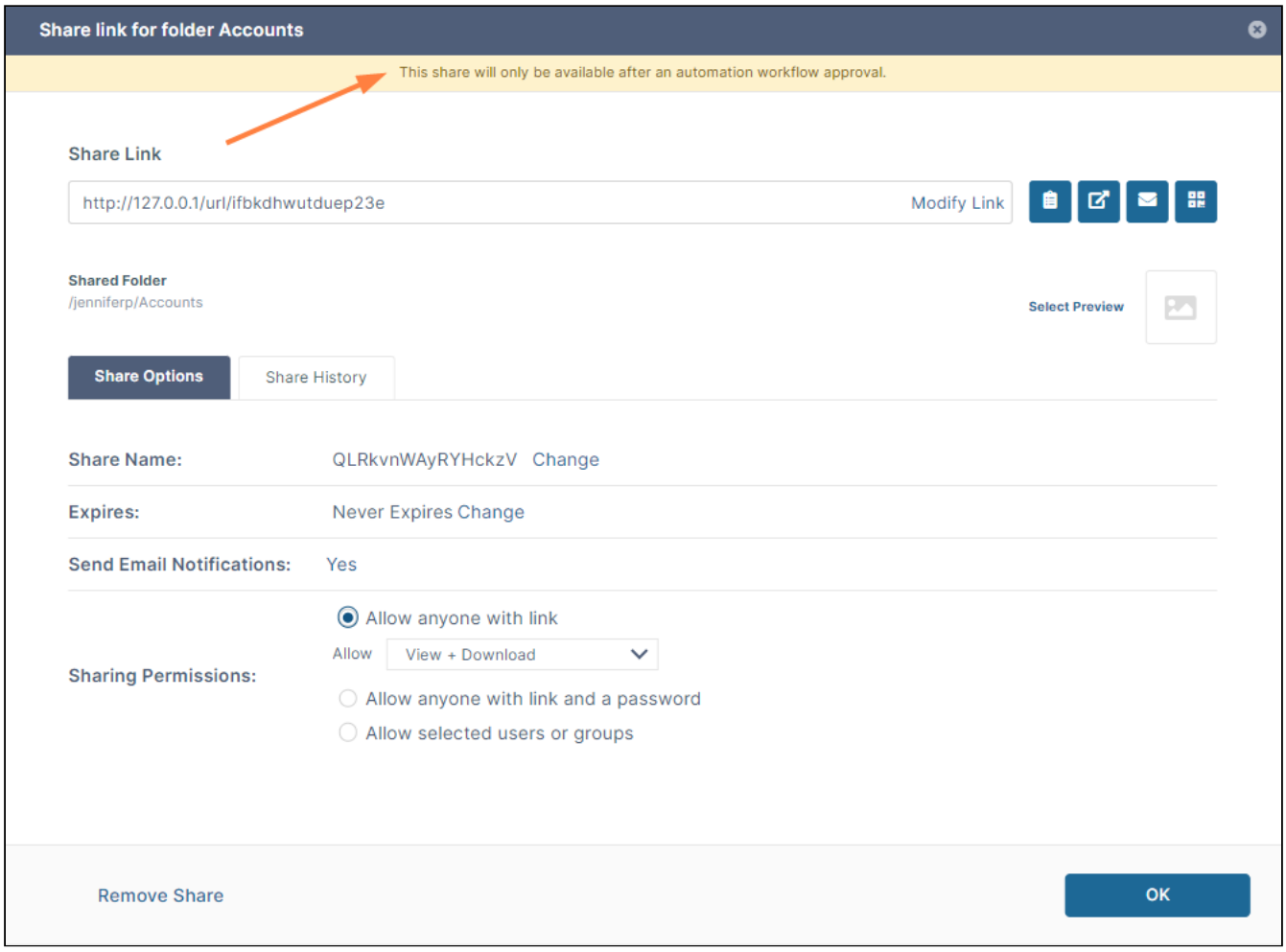
Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Shares that Require Approval

In some FileCloud systems, when a file or folder is shared with other users, the share is not made available to them until a specified number of approvers approve the share. If any users reject the share, it is deleted.
For information about how share approvals are configured, see Share Approval Workflows.

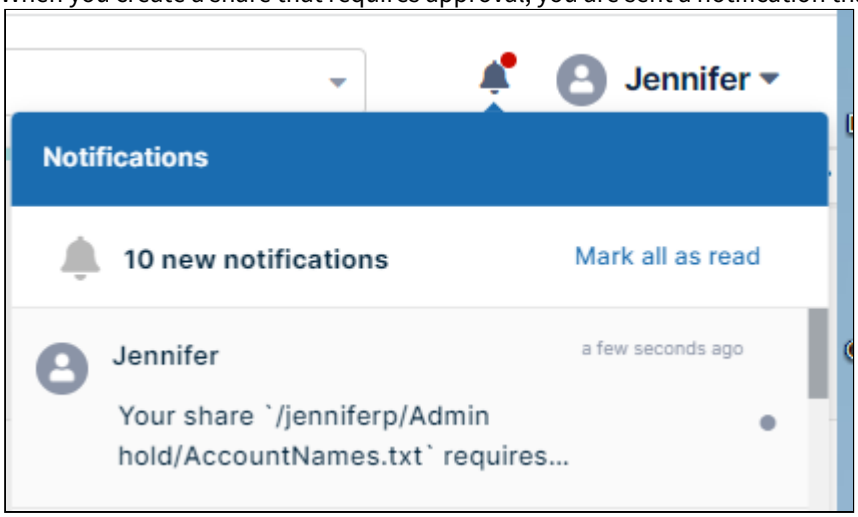
If approvals are required on shares in your system, when you share a file, a ribbon appears at the top of the Share Link box indicating that the share will become available after approval.



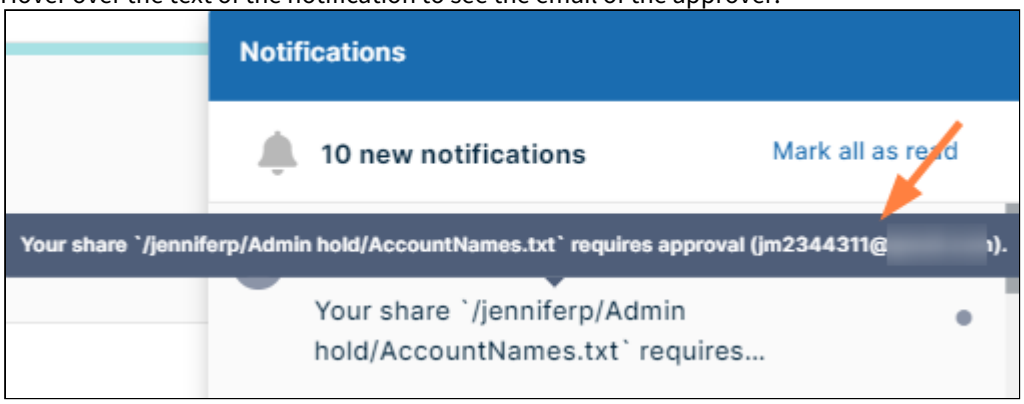
How to know the approval status of a share

Checking your notifications

When you create a share that requires approval, you are sent a notification that confirms that it is awaiting approval.



Hover over the text of the notification to see the email of the approver:

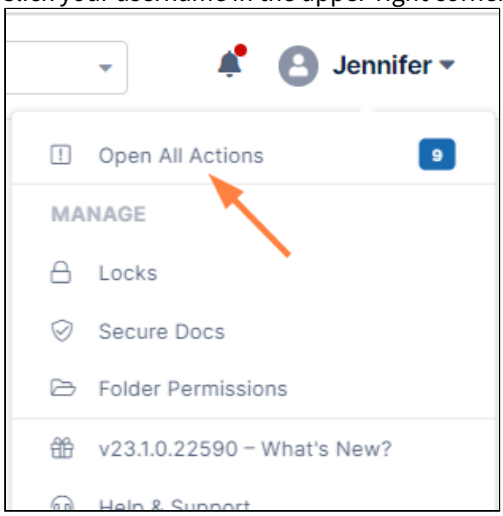


Checking the Actions screen

Another way to check the status of an approval is to go to the **Sent** tab on the **Actions** screen.

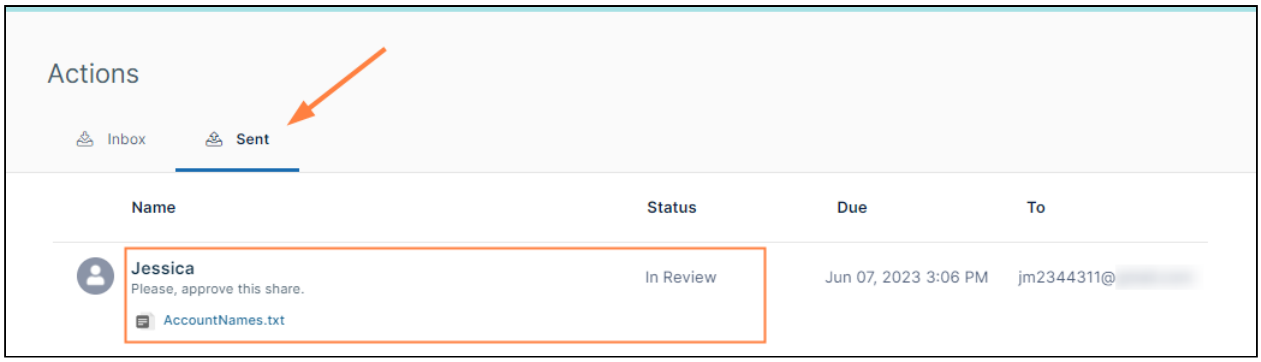
To view the Sent tab:

1. Click your username in the upper-right corner of the screen and choose **Open all actions**.



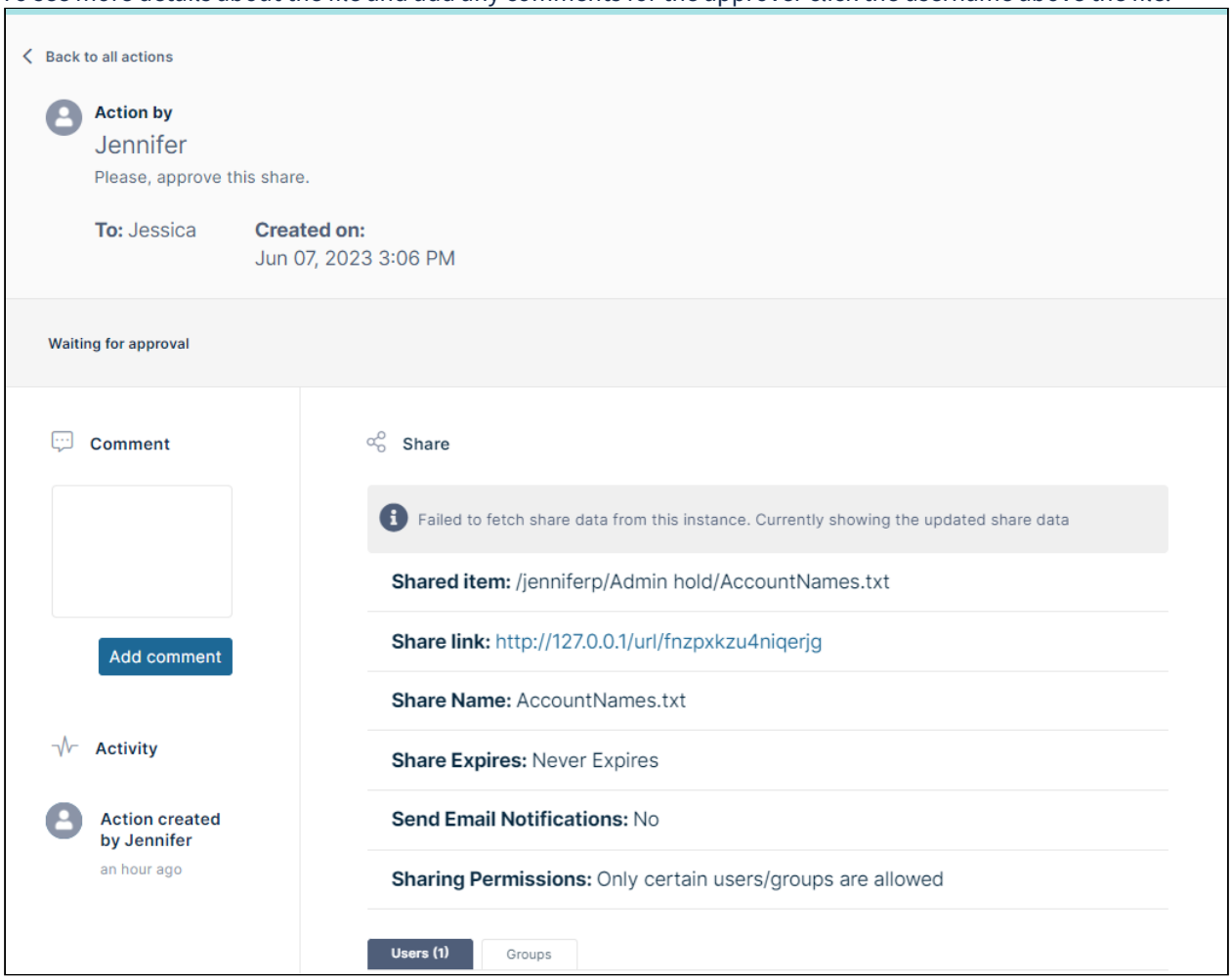
The **Actions** screen opens with the Inbox tab selected.

2. Click the **Sent** tab.

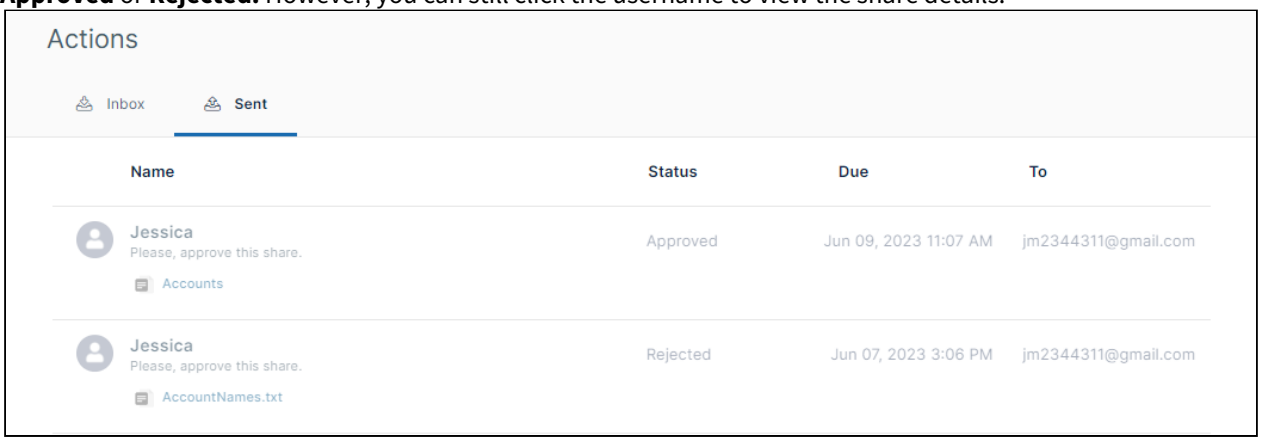


Your share that was sent for approval is listed by the name of the approver. Its status and the filename are also listed.

3. To see more details about the file and add any comments for the approver click the username above the file.

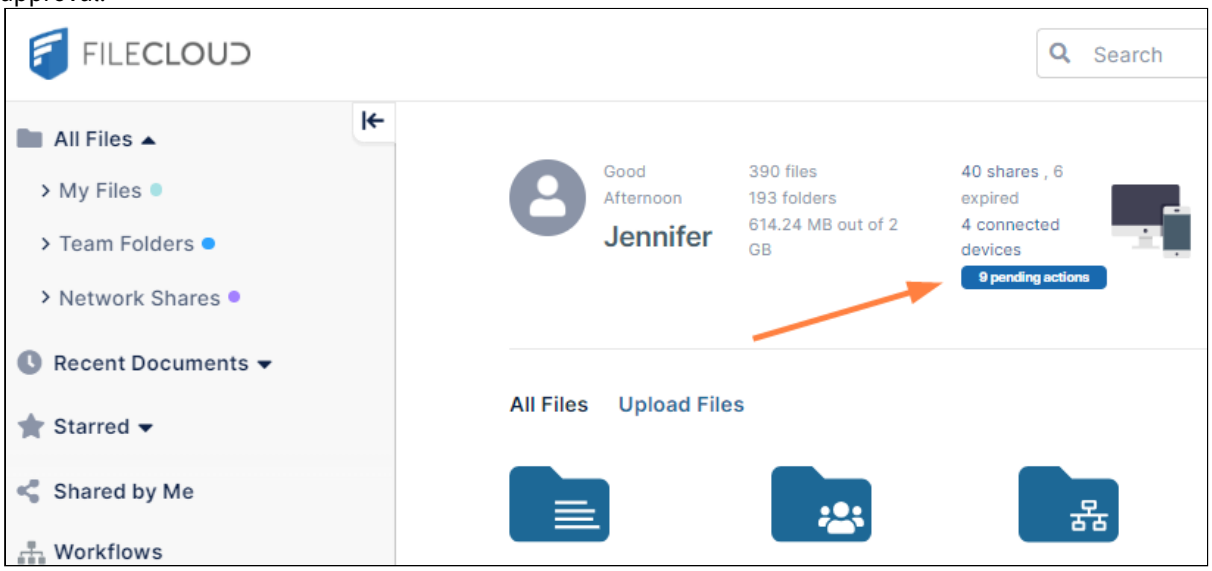


Once the share has been approved or rejected, the listing appears grayed out and the **Status** appears as **Approved** or **Rejected.** However, you can still click the username to view the share details.

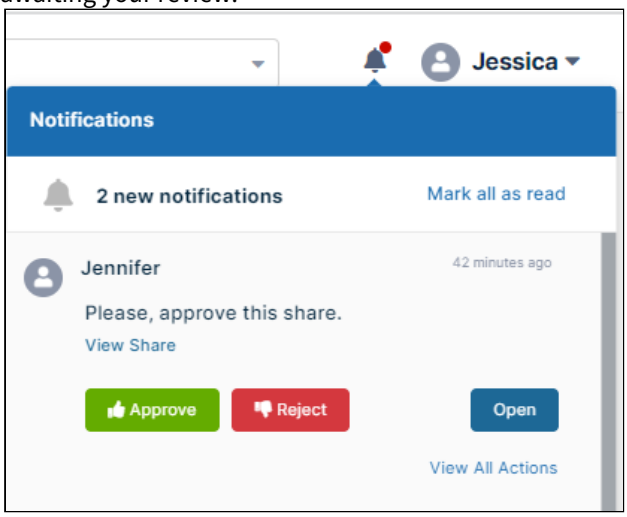


How to know if a share is awaiting your action

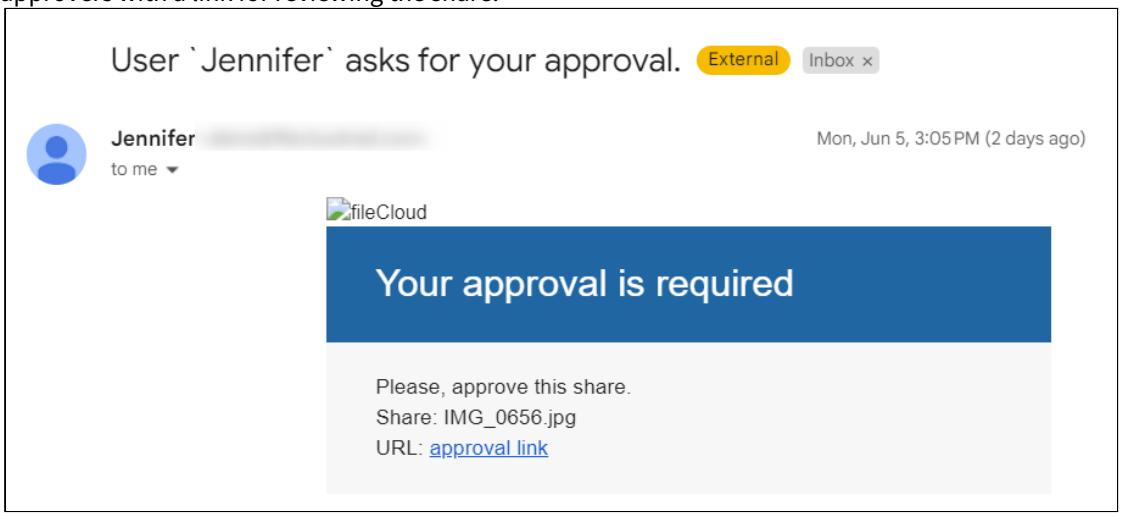
When you first log in to the user portal, if you see the pending actions button, there may be a share awaiting your approval.



In addition, if you click the **Notifications** icon at the top of the screen, you will see any notifications about shares awaiting your review:



In some FileCloud systems, when a share is automatically sent for approval an email notification is sent to the approvers with a link for reviewing the share:



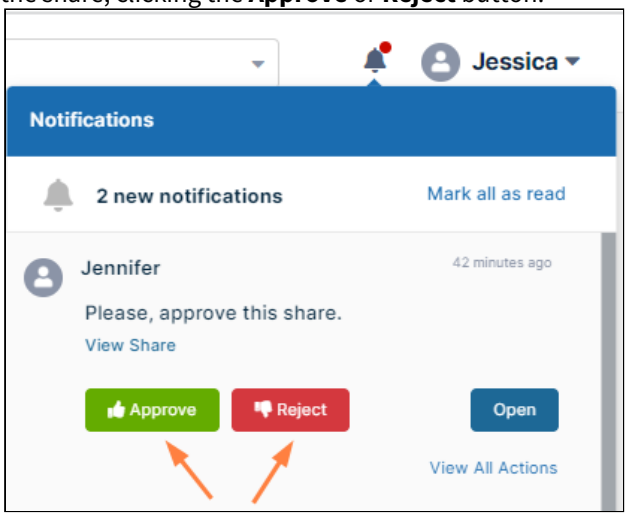
If you receive an approval email, you can click the approval link to open the detailed action page for the share.

How to approve or reject a share

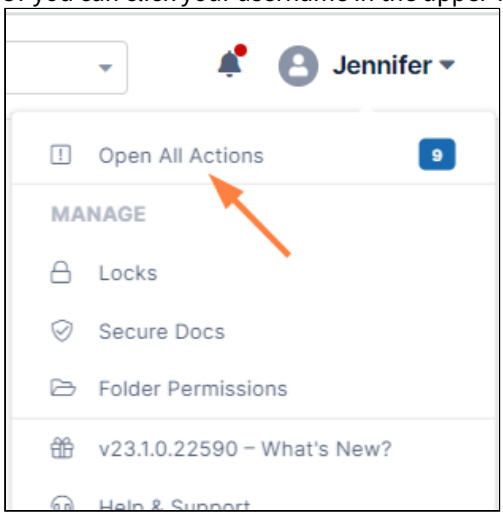
Quickly approving or rejecting a share

You can approve or reject a share without reviewing it.

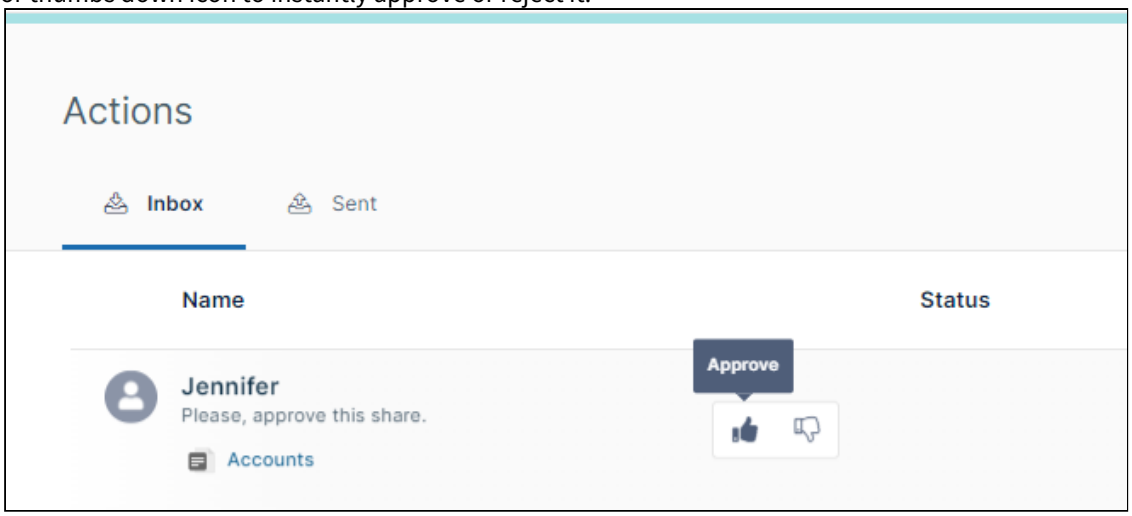
- You can do this is by clicking the **Notifications** icon at the top of the screen, and in the notification listing about the share, clicking the **Approve** or **Reject** button.



- Or you can click your username in the upper-right corner of the screen and choose **Open all actions:**

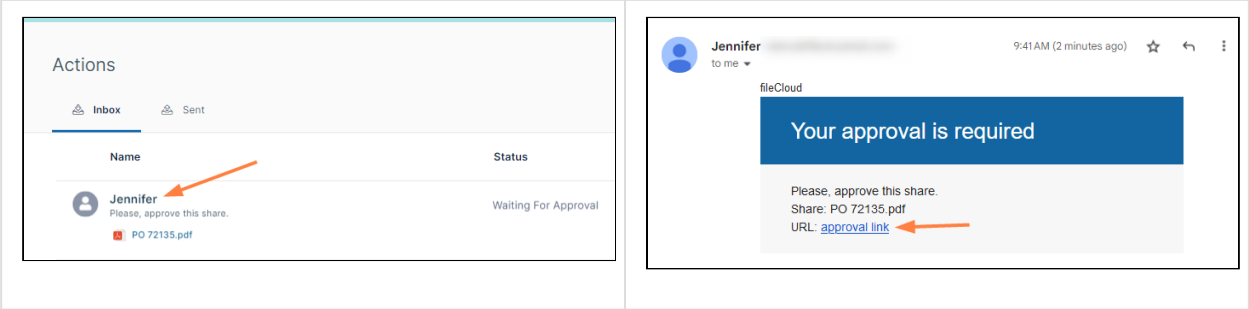


The Actions page opens to the **Inbox**, where you can hover over the listing for the share and click the thumbs up or thumbs down icon to instantly approve or reject it:



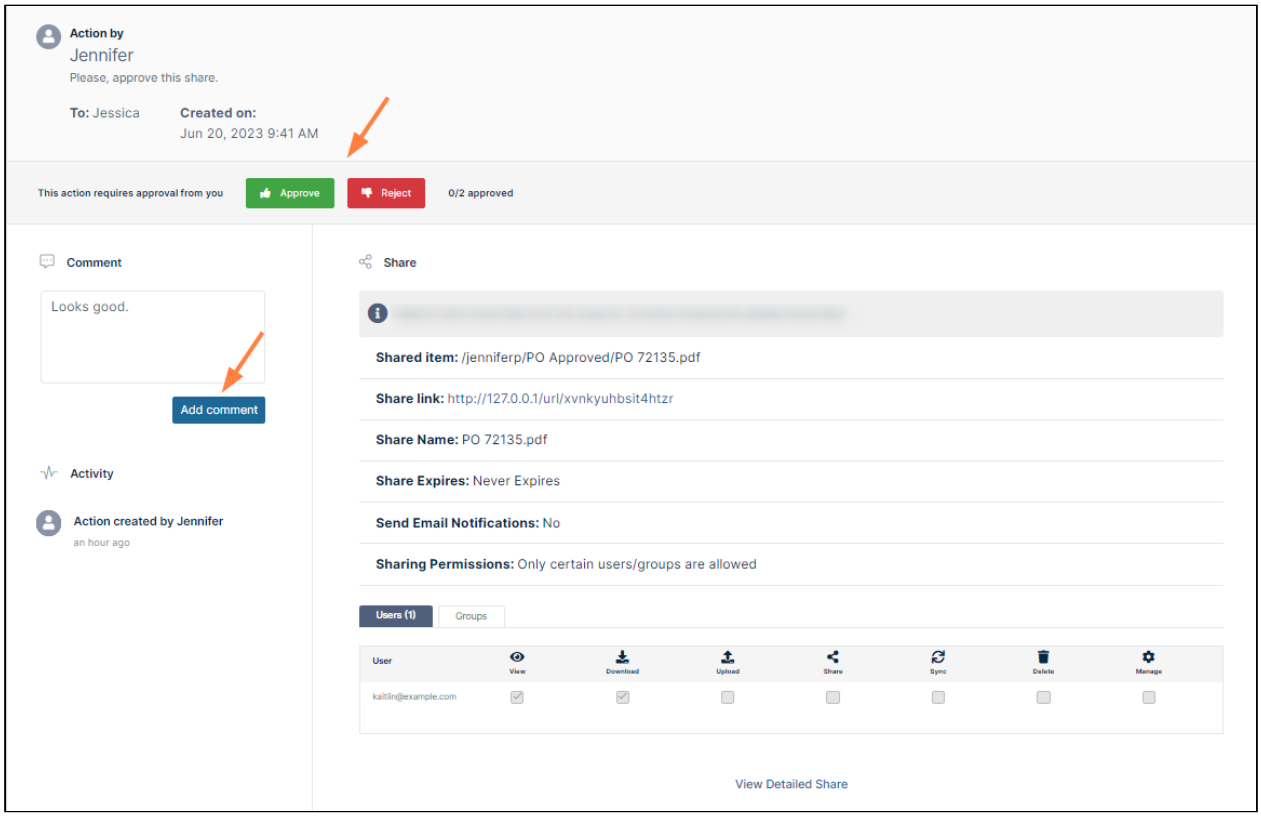
Reviewing a share before approving or rejecting it

1. Access the detailed Action screen for a share either by going to the Inbox listing in the Actions screen and clicking the listing for a share or by clicking the link in an email share notification.



The detailed Action screen for the share opens.

2. If the screen includes a preview file, as an approver, you may want to check the preview.
3. If you want to enter a note to the user who sent the file for review, enter a note in **Comment**, and click **Add Comment**.
4. Once you have reviewed the file, approve it by clicking the thumbs up icon or reject it by clicking the thumbs down icon.



If the share is approved, the users or groups shared with can now access it. If the share is rejected, it is deleted.

Using the Secure Web Viewer

> FileCloud's Secure Web Viewer (Beta version) is available beginning in FileCloud version 23.2.

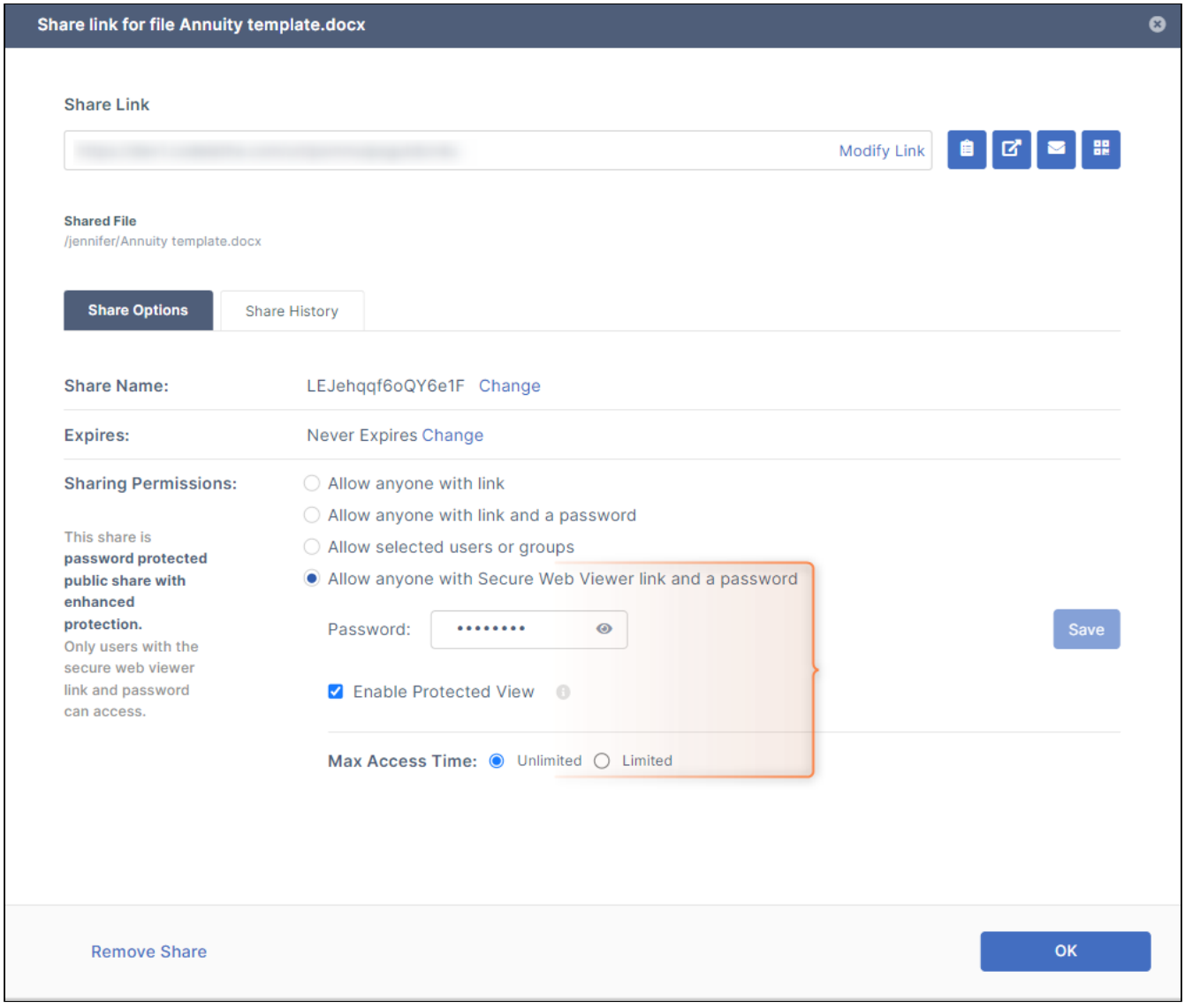
The FileCloud Secure Web Viewer is a Digital Rights Management (DRM) viewer that requires users to enter a secure web link and password to view file shares. Optionally, the number of times users are allowed to view the file is limited or

viewing is controlled by requiring users to view a small portion of the file at a time through a draggable lens. Only files of types jpg, png, pdf, docx, and pptx that are less than 20 MB are available for viewing through the Secure Web Viewer.

Sharing a file with a Secure Web Viewer link

A file share you create has DRM security when you select the sharing permission **Allow anyone with Secure Web Viewer link and a password**. This is a public share option that requires the share recipient to view the file through the Secure Web Viewer after entering the share link and a password generated when you created the share. When creating the share, you can further restrict viewing by only permitting small portions of the file to be viewed at a time.

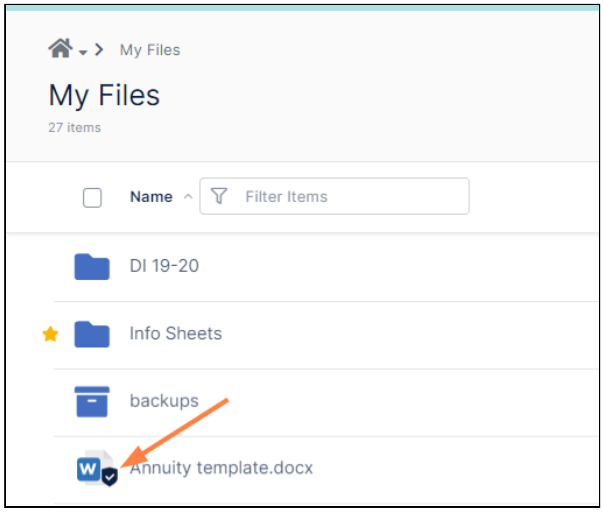
The **Allow anyone with Secure Web Viewer link and a password** option only appears if your admin has enabled WebDRM. The option appears disabled for files of types other than jpg, png, pdf, docx, and pptx, and for files greater than 20 MB.



To give users access to the share, you must supply them with the share link and password. When they click the link and

then enter the password, the Secure Web Viewer opens and displays the file.

Files that you have shared with a Secure Web Viewer link appear with a shield icon beside them in your FileCloud folders.

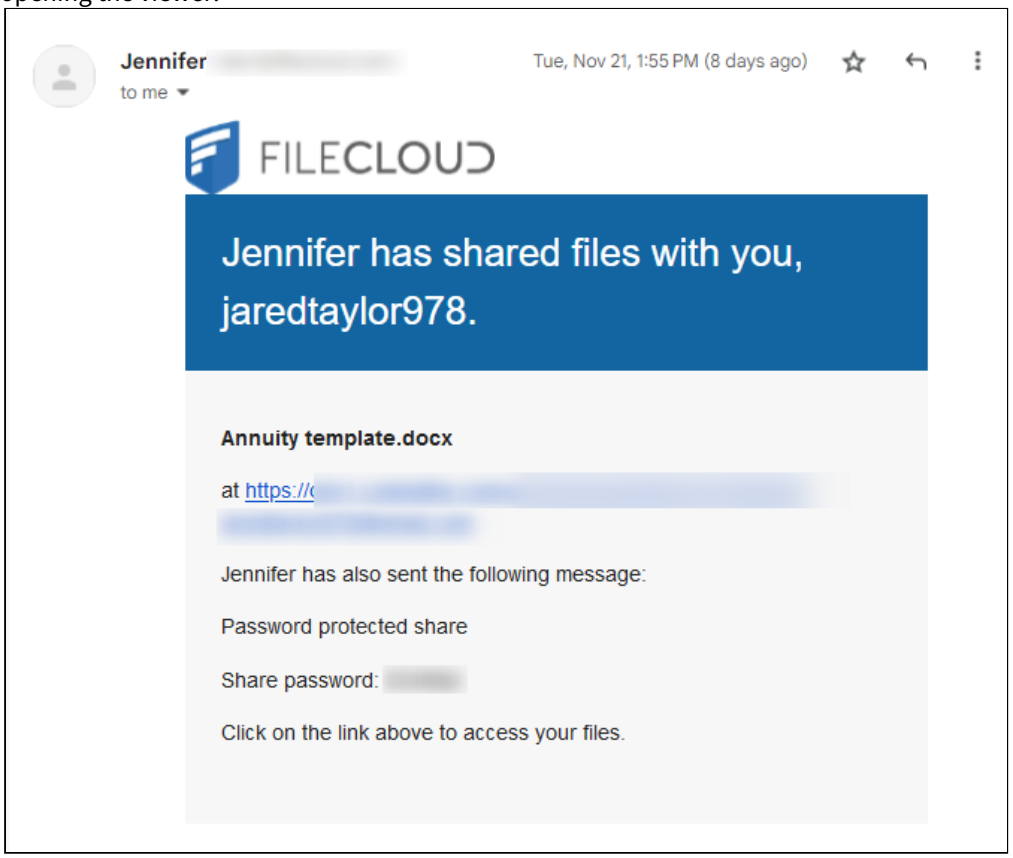


The option to share a file with a Secure Web Viewer link is available in the user portal and all of the FileCloud client apps, such as Sync, Drive, and mobile. However, the link can only be accessed through your web browser.

For step by step instructions for sharing a file with the **Allow anyone with Secure Web Viewer link and a password** see Public Share Options for Files**.**

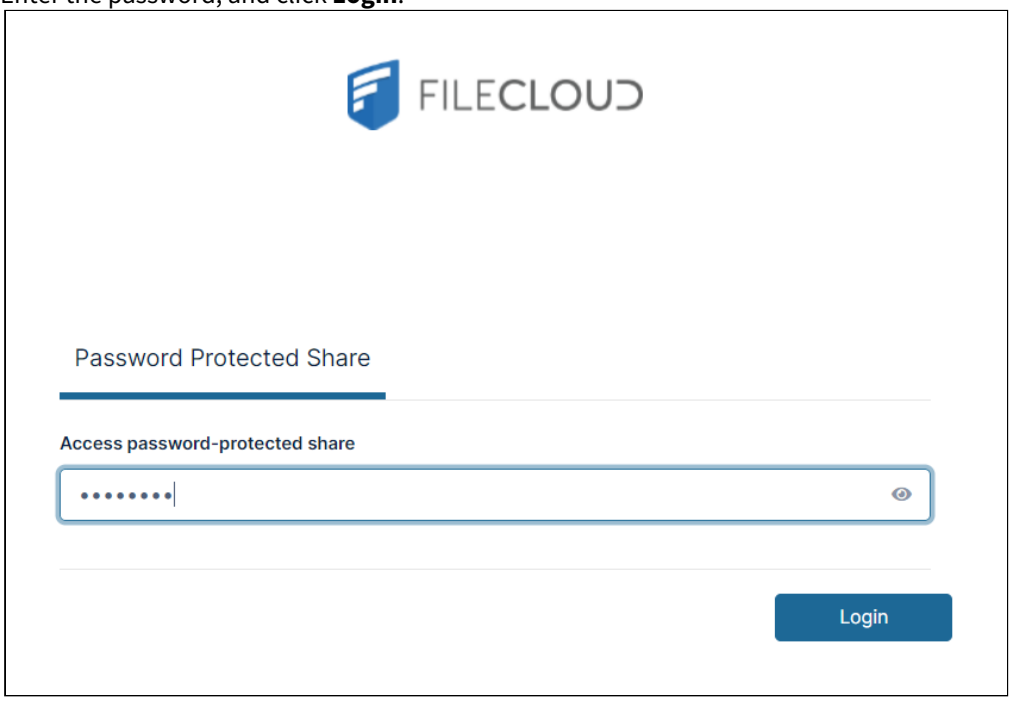
Viewing a file with a Secure Web Viewer link

When a file is shared with you using a Secure Web Viewer link you receive a message with the link and a password for opening the viewer:

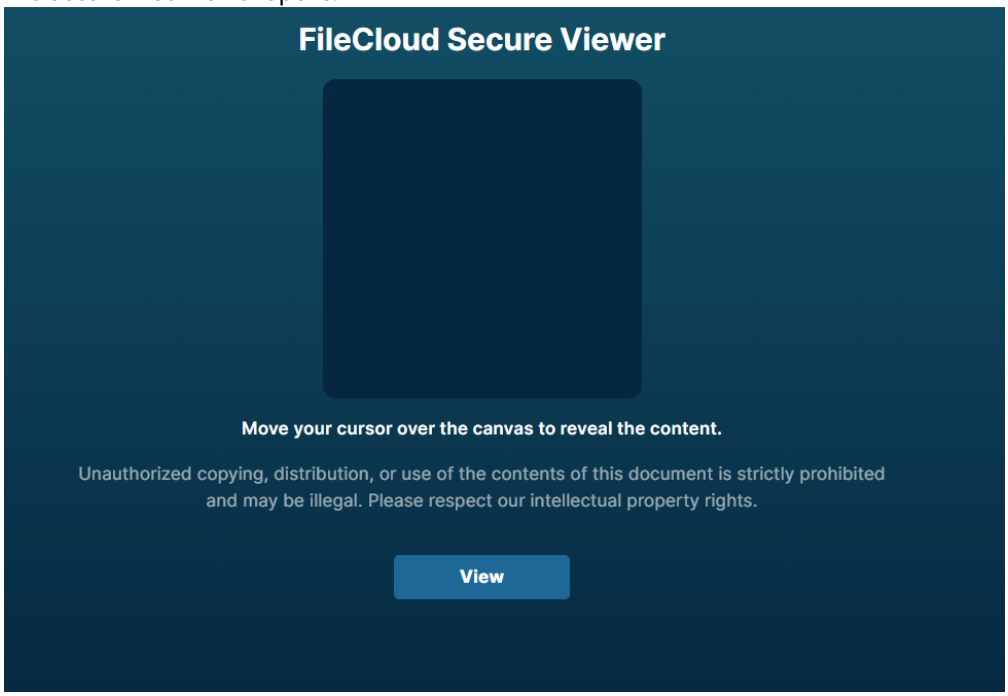


1. Click the link in the email, or copy and paste it into a web browser.
   A FileCloud login screen that prompts you for the password opens.

2. Enter the password, and click **Login**.

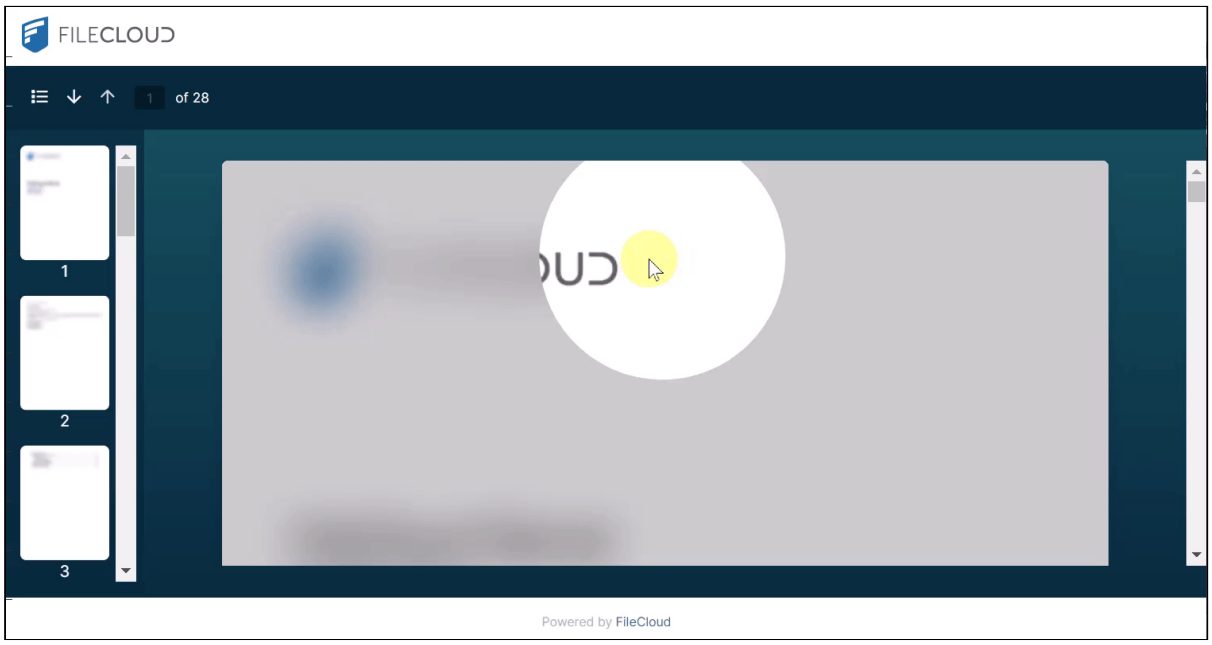


The Secure Web Viewer opens.

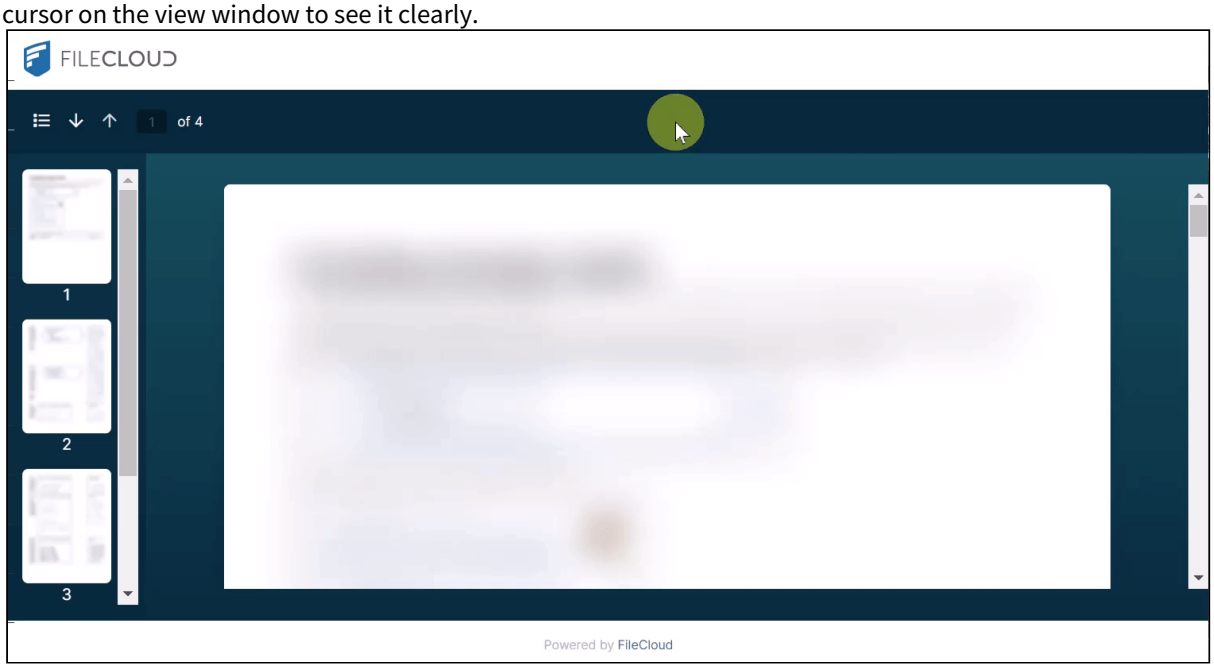


3. Click **View**.
The file opens in the Secure Web Viewer.

If the share has protected view enabled, you can only view a small portion of the file at a time through a circular lens, but you can drag the lens around the view window with your cursor to see all the content.



If the share does not have protected view enabled, you can view the full file at once, but you must place your cursor on the view window to see it clearly.



Notifications

You can receive notifications about files or folders stored in all types of folders. Your administrator sets your default notification settings which determine whether notifications are sent to you when:

- a file or folder is shared with you
- one of the following actions is performed (by you or another user) on a file or folder you have access to:
    - a file or folder is uploaded
    - a file or folder is downloaded
    - a file or folder is shared
    - a file or folder is deleted
    - a file or folder is renamed
    - a file is updated
    - a file is previewed in the browser or one of the mobile apps
    - a file or folder is locked

If you are permitted to to override your administrator's default settings, you can specify which actions you are notified about.

There are several ways you can specify your own notification settings.

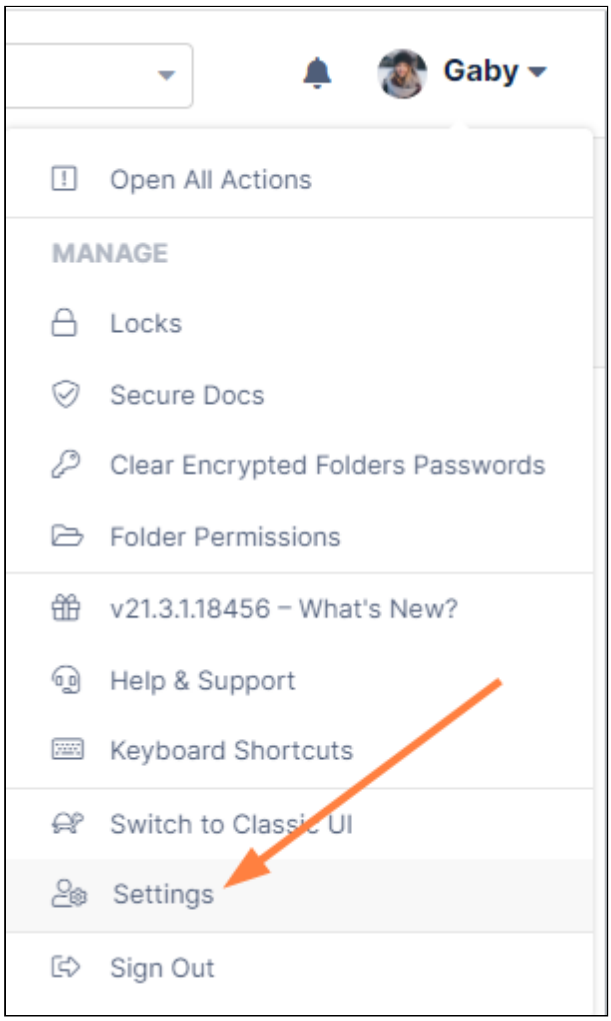
- Customize notifications in user settings
- Set notifications for Files and Folders
- Effective Notifications

Customize notifications in user settings

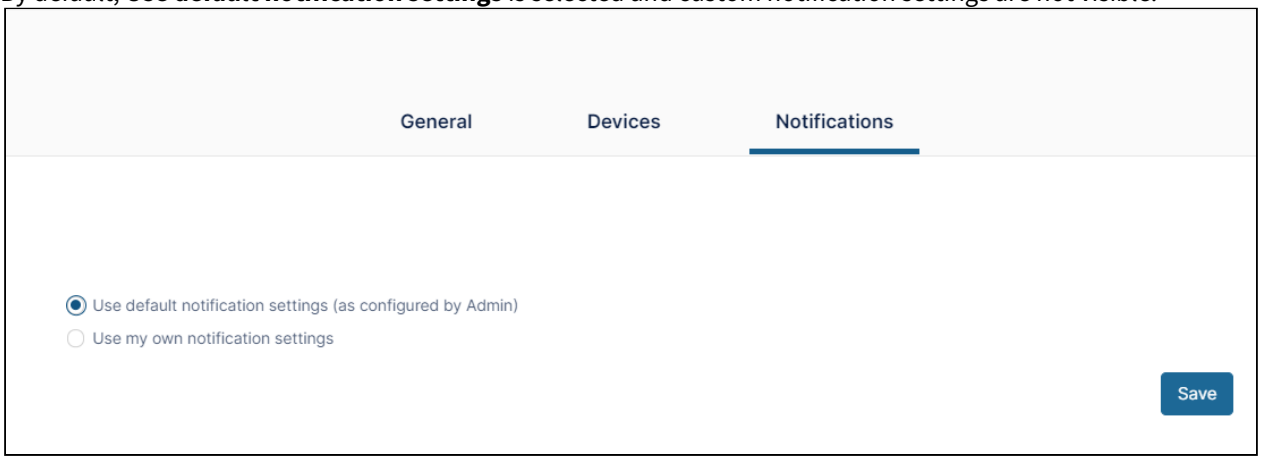
If you are permitted to override your administrator's default settings, you can specify which actions you are notified about.

Customize your notifications settings

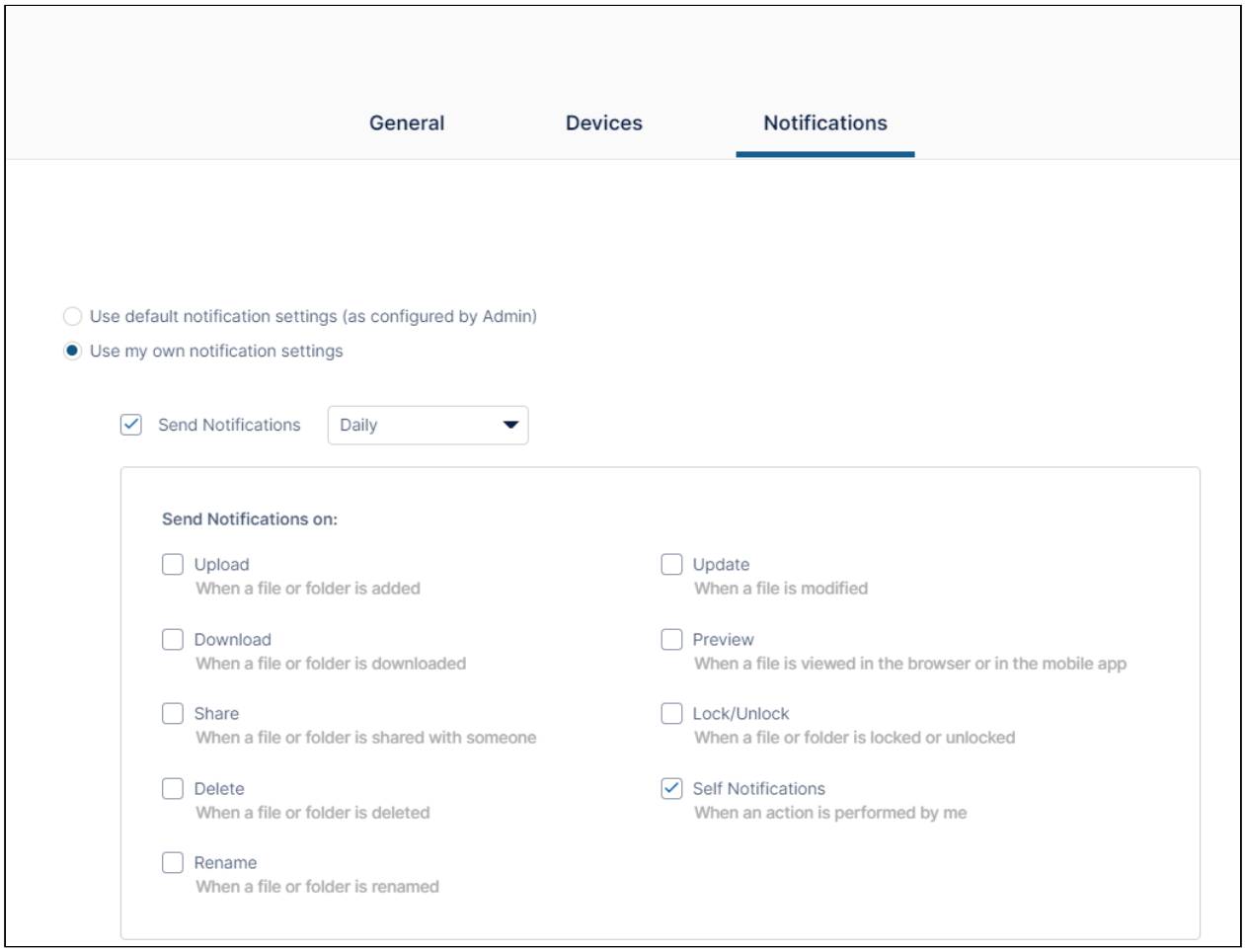
1. Click your username and choose **Settings**.



2. In the **Settings** screen, click the **Notifications** tab.
   By default, **Use default notification settings** is selected and custom notification settings are not visible.



3. If you are permitted to override default settings, **Use my own notification settings** and all of the options that appear under it can be edited. If you are not permitted to override default settings, **Use my own notification settings** and the options under it cannot be edited.
4. Select **Use my own notification settings**.



5. By default, **When to send** is set to **Daily**.
   - If you want to receive notifications as soon as an action occurs, choose **Instant**.
   - If you want to receive notifications less frequently, choose **Daily**, **Weekly**, or **Custom** in the drop-down list. You will receive an email listing all new notifications since the last notification email.
   - If you choose **Custom**, a text box opens for you to enter the notification interval in minutes. You are not allowed to enter a value that is less than the notification interval set by your admin.
6. **Send Notifications on** indicates which actions you will receive notifications about. All actions other than **Self Notifications** are unchecked by default.
   Check any actions that you want to receive notifications about.
7. Uncheck **Self Notifications** if you do not want to receive notifications about changes you make to your own files or folders.
   When it is unchecked, you only receive notifications when another user performs an action on a file or folder that you have shared with them or on a file or folder that you also have access to.

Edit path notifications rules

At the bottom of the page is a **Path Notifications Rules** table listing the full paths of any files or folders you have configured with notification rules.
For information about configuring paths of files or folder with notification rules, see Set notifications for files and folders.

1. To edit the rule, under **Actions**, click the edit button.
   A dialog box identical to the upper portion of the **Global Notifications Settings** (the current screen) opens for the folder listed under **Path**.
   Change any of the settings and click **Save**.
2. To delete the rule, under **Actions**, click the delete button.
   Note that settings on paths override the custom notification settings that appear above them.

Disable custom notifications without removing custom settings:

1. Click **Settings** in the navigation bar, and click the **Notifications** tab.
2. Uncheck **Send Notifications**.
3. Click **Save**.

Return to the default notification settings

1. Click **Settings** in the navigation bar, and click the **Notifications** tab.
2. Select **Use default notification settings (as configured by Admin)**.
3. Click **Save**.
   Your previous settings including your path settings are not saved. If you want to use them again, you must reset them manually.

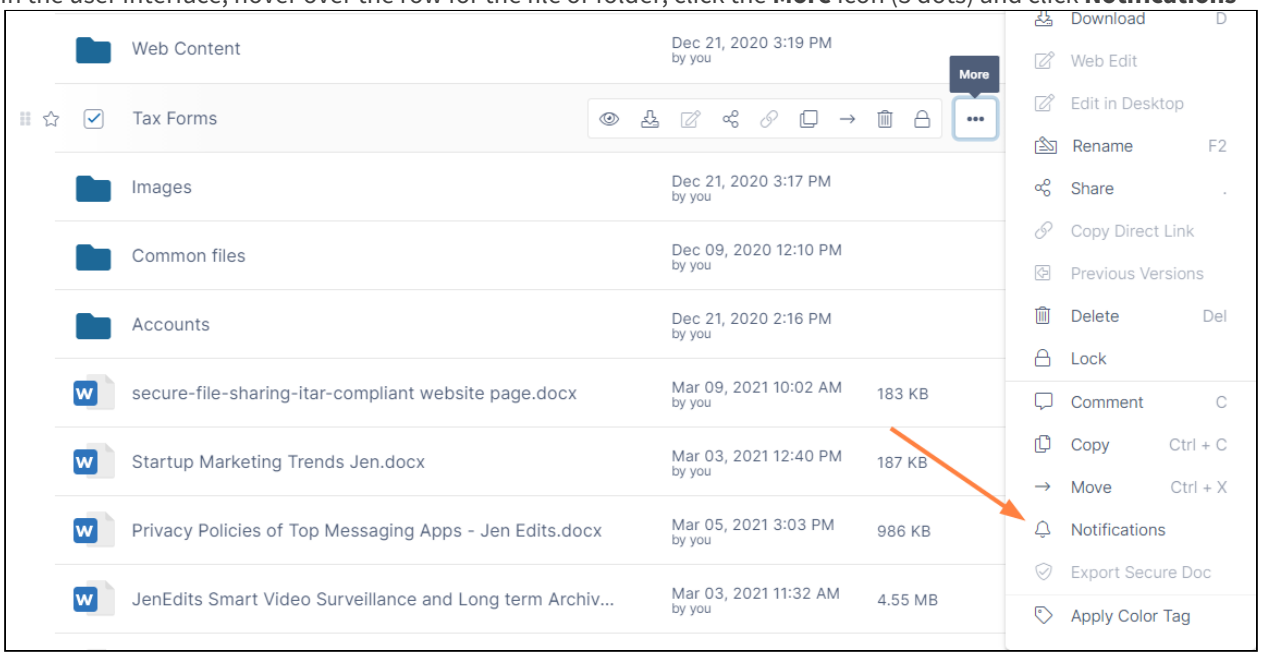
Set notifications for Files and Folders

If you are permitted to to override your administrator's default settings, you can specify which actions you are notified about for specific files and folders. The notifications tell you when other users that have access to the file or folder (either because they own it or you or another user has shared it with them) perform an action on it. You can also notify yourself when you perform an action on the file or folder.

The following procedure shows you how to set notifications for an individual file or folder from its row in the user interface. If you want to set notifications for an individual file or folder from its effective (combined) notifications in the **Details** pane, see Effective Notifications.

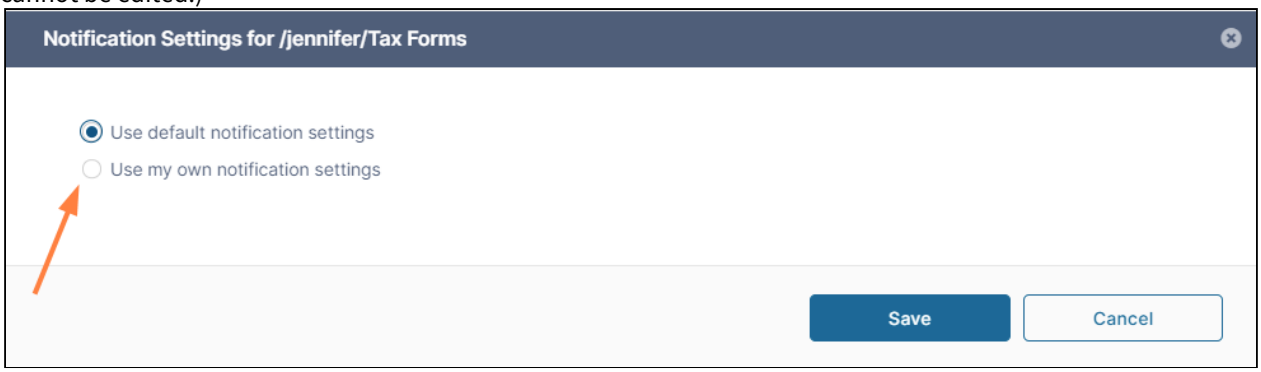
Customize notifications for a file or folder:

1. In the user interface, hover over the row for the file or folder, click the **More** icon (3 dots) and click **Notifications**



2 Go to a Folder's Notifications

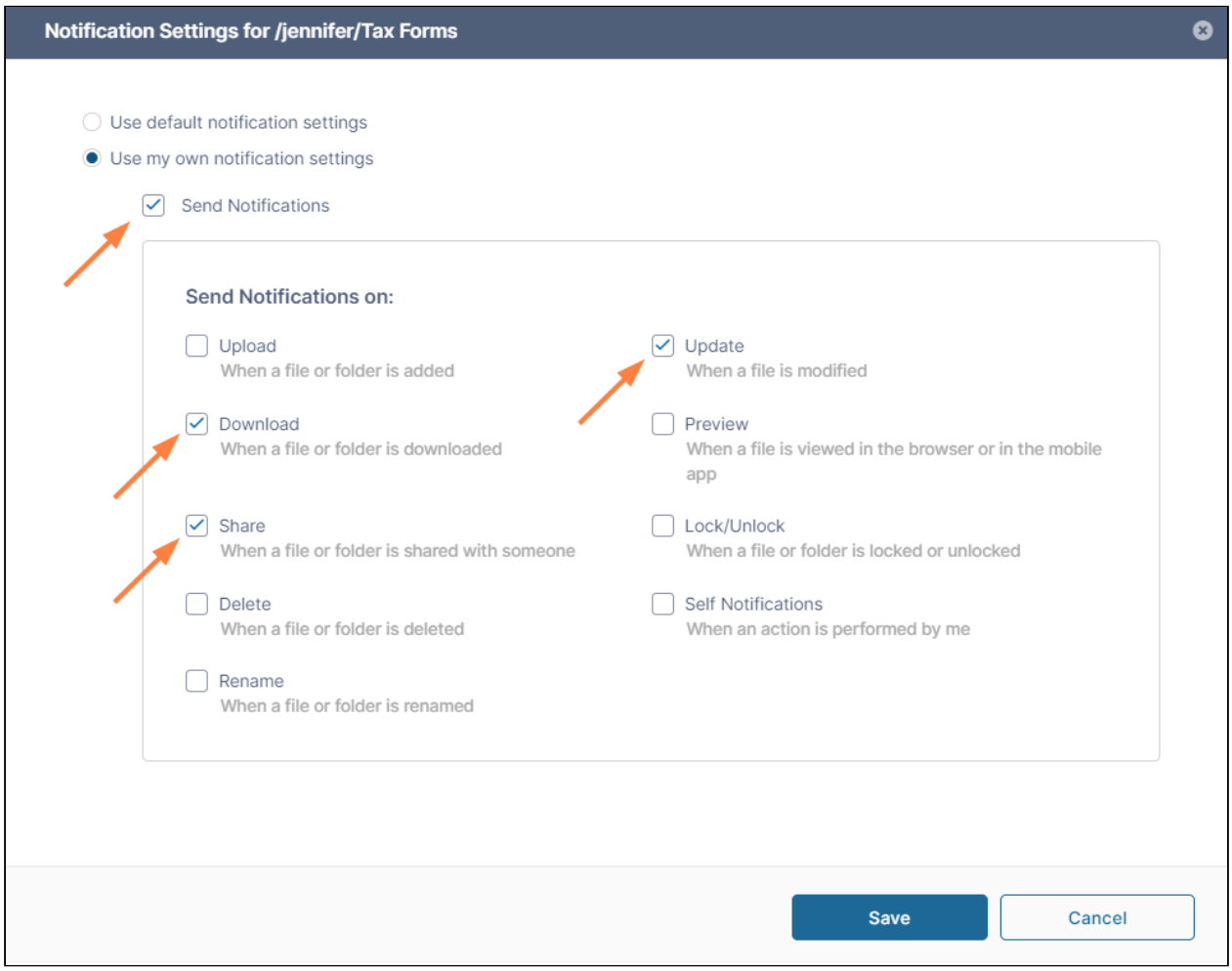
2. In the **Notification Settings** dialog box, choose **Use my own notification settings**.
(If you are not permitted to override default settings, **Use my own notification settings** and the options under it cannot be edited.)



3 Click radio button for Use my own notification settings

The Notification Settings expand to display the different actions that can trigger notifications.

3. Leave **Send Notifications** checked.
4. Check the types of actions on the file or folder that you want to receive notifications about.

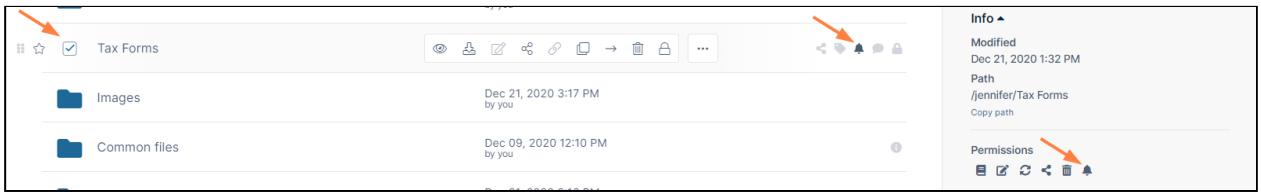


4 Check actions for notifications

5. To receive notifications when you perform an action on the file or folder, check the last checkbox, **Self Notifications**.

   > If you do not check **Self Notifications**, you only receive notifications when a user you have shared a file with performs an action on that file.
   > If you do check **Self Notifications**, you also receive a notification when you perform an action on a file you own or a file that has been shared with you.

6. Click **Save**.
   When you hover over the row for the file or folder, the notification (bell-shaped) icon at the end appears enabled, and if you select the file or folder, the notification icon in the **Details** panel also appears enabled.



5 View notification icon

When you go to **Settings > Notifications**, the file or folder path is listed under **Path Notification Rules**.

Disable custom notifications for a file or folder without removing custom settings:

1. In the user interface, hover over the row for the file or folder, click the **More** icon (3 dots) and click **Notifications**.
2. In the **Notifications Settings** dialog box, uncheck **Send Notifications**.
3. Click **Save**.

Return to the default notification settings

1. In the user interface, hover over the row for the file or folder, click the **More** icon (3 dots) and click **Notifications**.
2. In the **Notifications Settings** dialog box, choose **Use default notification settings**.
3. Click **Save**.
   If you want to return to your custom settings, you must reset them manually.

Priority of Notification Settings

The notification settings which take top priority are those you set on the specific file or folder that you are working on. The order of priority for notifications from top to bottom is:

1. The specific file or folder you are working on.
2. Its parent folder.
3. Each higher level of parent folder.
4. Your user settings.
5. Your policy settings.
6. Your administrator's global settings.

Effective Notifications

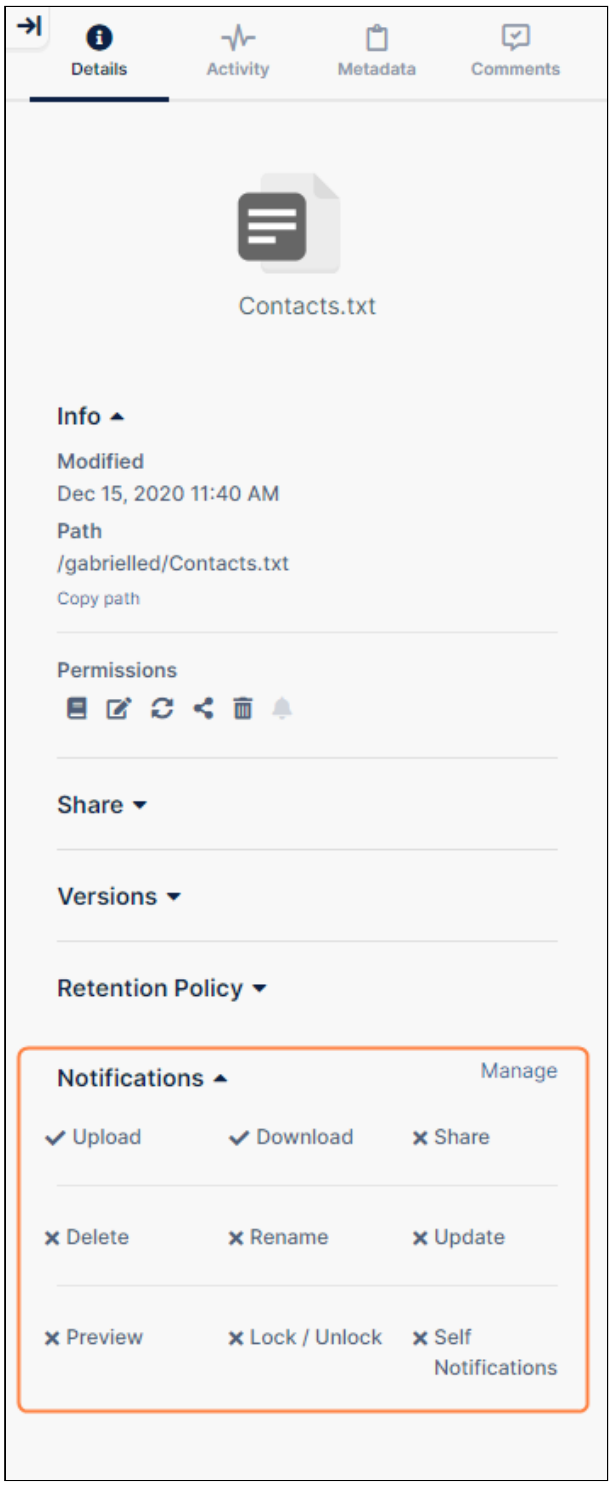
If a file or folder's notification settings are configured in more than one place, the notifications with the highest priority are its **effective notifications**. For example, if you have set global notifications for your files and folders and have overridden them on a specific file, the settings you have set on the specific file are the effective notifications.

The order of priority for effective notifications goes from top to bottom in the list:

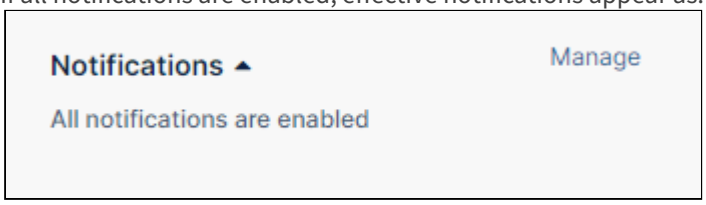
1. The specific file or folder you are working on.
2. Its parent folder.
3. Each higher level of parent folder.
4. Your global user settings.
5. Your administrator's settings on your policy.
6. Your administrator's global settings.

For example, if your administrator has disabled notifications on file deletions but you have enabled them for a particular file, they are enabled for that file.

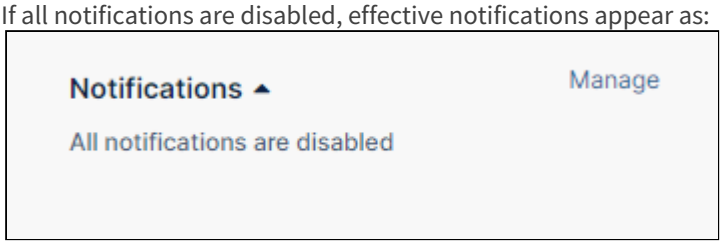
Effective notifications are listed at the bottom of the details pane for a selected file or folder.
The following screenshot shows the effective notifications for the file Contacts.txt. Enabled notifications are followed by a check, and disabled notifications are followed by an x.


Details
Activity
Metadata
Comments
Contacts.txt
Info
Modified
Dec 15, 2020 11:40 AM
Path
/gabrielled/Contacts.txt
Copy path
Permissions
Share
Versions
Retention Policy
Notifications
Manage
Upload
Download
Share
Delete
Rename
Update
Preview
Lock / Unlock
Self Notifications

If all notifications are enabled, effective notifications appear as:



If all notifications are disabled, effective notifications appear as:



Workflow Automation

Introduction to Workflow Automation

Workflow Automation enables you to automate the steps in processes you complete regularly, such as document approvals or file archiving. Simply choose a trigger event that initiates the workflow, then select from a group of simple steps, such as moving a file to a new location or waiting for an approval. Add as many steps as required to complete the workflow and fill in values for folder locations, email addresses, and other parameters.

The following video introduces you to the process of creating an automated workflow. In this example, we use the **Wait for Approval** workflow action that requires a share to be approved before it is created.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

For step by step instructions on creating a workflow, see How to Create a Workflow.

For a more detailed explanation of Share Approval workflows, see Share Approval Workflows.

ⓘ The number of workflows you may create depends on the type of FileCloud license you have.

Now that you have seen how Workflow Automation is performed, view the following topics for more information about what you can achieve with Workflow Automation and for detailed steps for creating workflows.

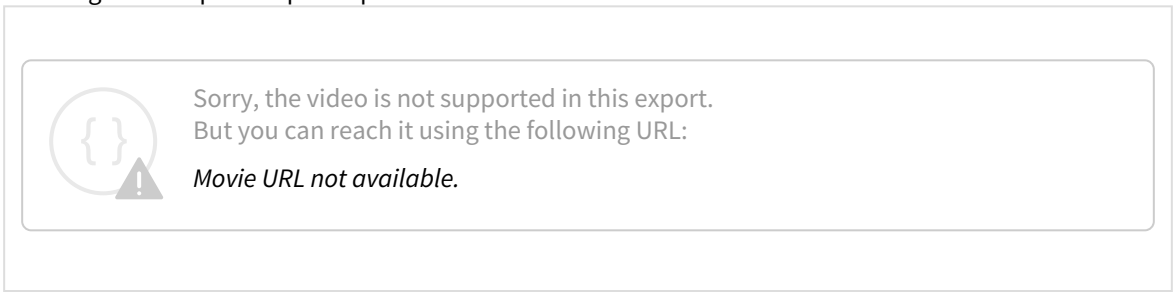
- How to Create a Workflow
- Workflow Triggers
- Workflow Steps
- Share Approval Workflows

- Delete a Workflow
- Rename a Workflow
- Share a Workflow
- View Workflow History
- Workflow Example: PO Approval and Submission

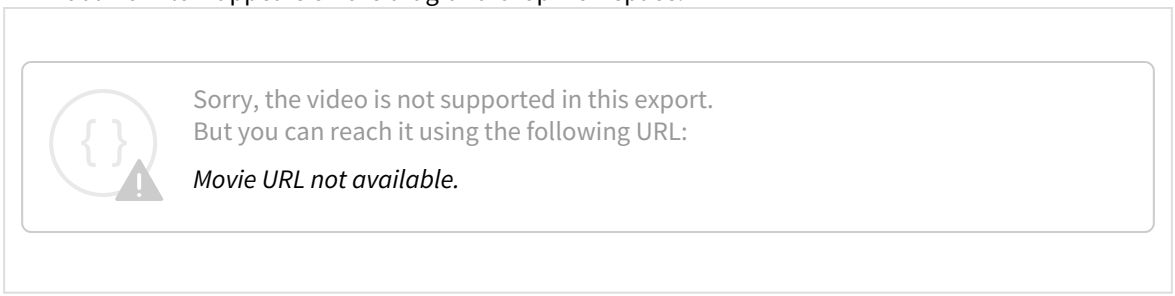
How to Create a Workflow

This page takes you through the steps for creating a workflow. Each main step is broken down into sub-steps which are followed by one or more brief videos showing you the procedures for completing them. In this example, when a file is created or updated on a department path, an email is sent to a user to alert them that a new file is ready for review.

1. **Initiate workflow creation.**
   a. In the navigation panel, click **Workflows**.
   The **Workflows** page opens.
   b. Click **Create New Workflow**.
   The drag-and-drop workspace opens.



2. **Choose a workflow trigger.**
   a. In the drag-and-drop workspace, click **Click Here to Start.**
   A list of triggers, events that initiate a workflow, appear.
   For information about the different types of triggers, see Workflow Triggers.
   b. Click a trigger, and click **Next**.
   c. In the following example, we choose the trigger **Automatically on a File Activity**.
   d. Since that trigger requires us to choose a file path and a file event, we select a path and choose the event **If a file is created or updated**, and then click **Add**.
   An initial workflow appears on the drag-and-drop workspace.



3. **Add steps to the workflow.**

a. Add a step.
For more information about the types of steps you can add to workflows and step parameters, see Workflow Steps.
In the following example, we add the **Send Email** step.

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But you can reach it using the following URL:

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b. Fill in the parameters for the step.
We fill in values for the **To** recipient, the **Subject** of the email, and the email **Body**.

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c. We include a variable in the **Body** of the email to make it more informative.
We add the full name of the new file including its path with the variable **File full path**.
For more information about using variables, see Using Variables in Workflows.

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But you can reach it using the following URL:

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d. Click **Save** to save the workflow details.
e. Repeat steps **a** through **d** to add any number of steps to the workflow.

4. **Save the workflow.**
   a. In the upper-left corner of the drag-and-drop workspace, name the workflow.
   b. Click **Create Workflow.**
   When you return to the **Workflow** page, you should see the workflow listed.

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But you can reach it using the following URL:

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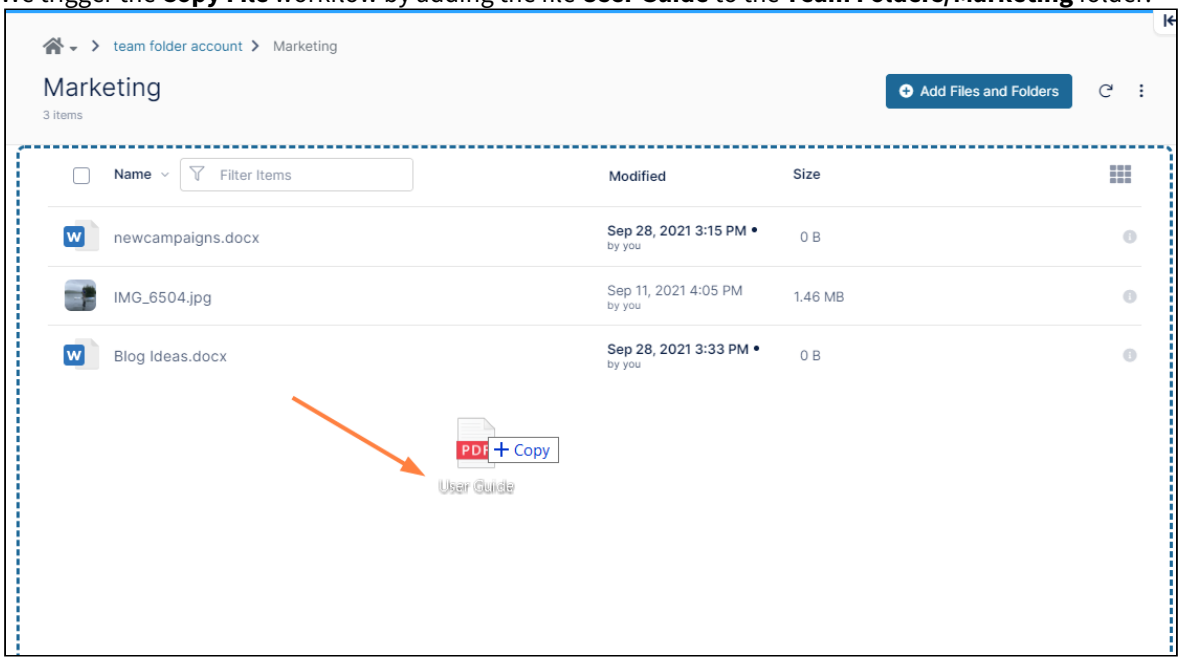
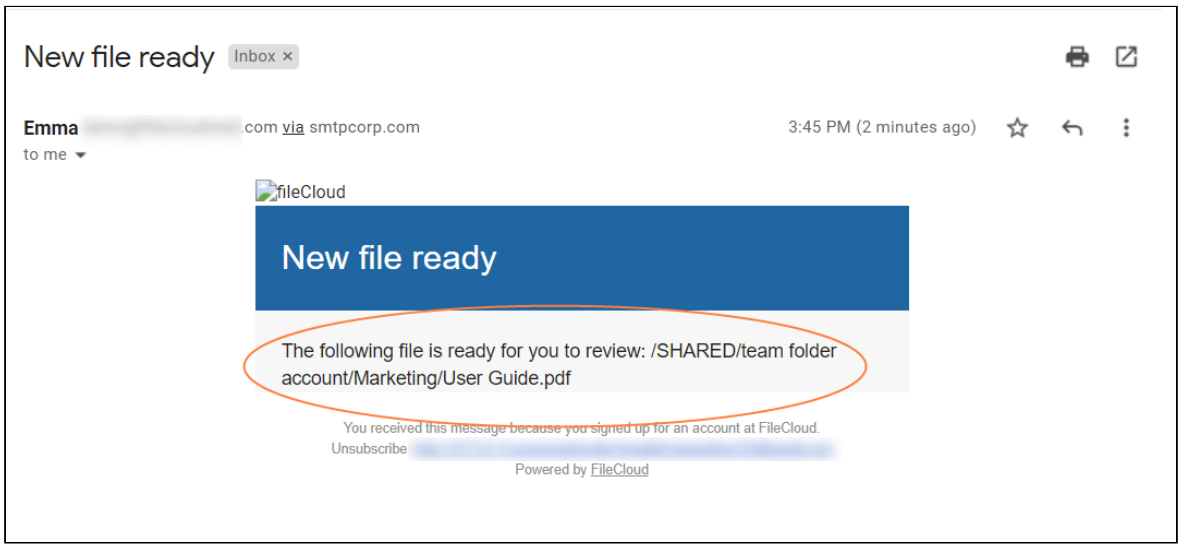
5. **Test the workflow.**
   a. Trigger the workflow.
   We trigger the **Copy File** workflow by adding the file **User Guide** to the **Team Folders/Marketing** folder.

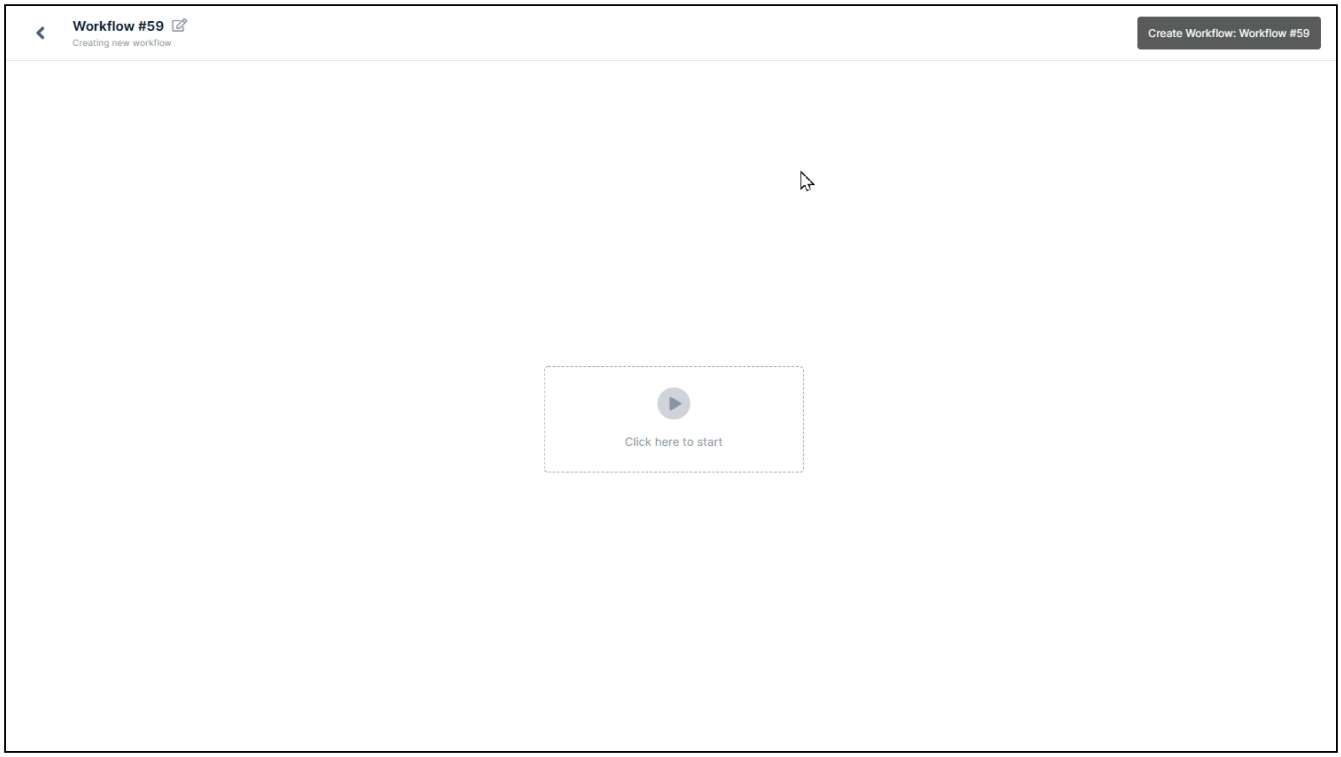


   b. Next we confirm that the workflow was triggered by checking if an email was sent to the recipient we added.
   c. We also check that our variable functions as expected by making sure the email includes name and path of the new file.



Workflow Triggers

Workflow triggers are the events that cause workflows to begin running. You choose the trigger for a workflow when you initiate workflow creation by clicking the arrow in the center of the Workflow screen.



The options for workflow triggers and their parameters are:

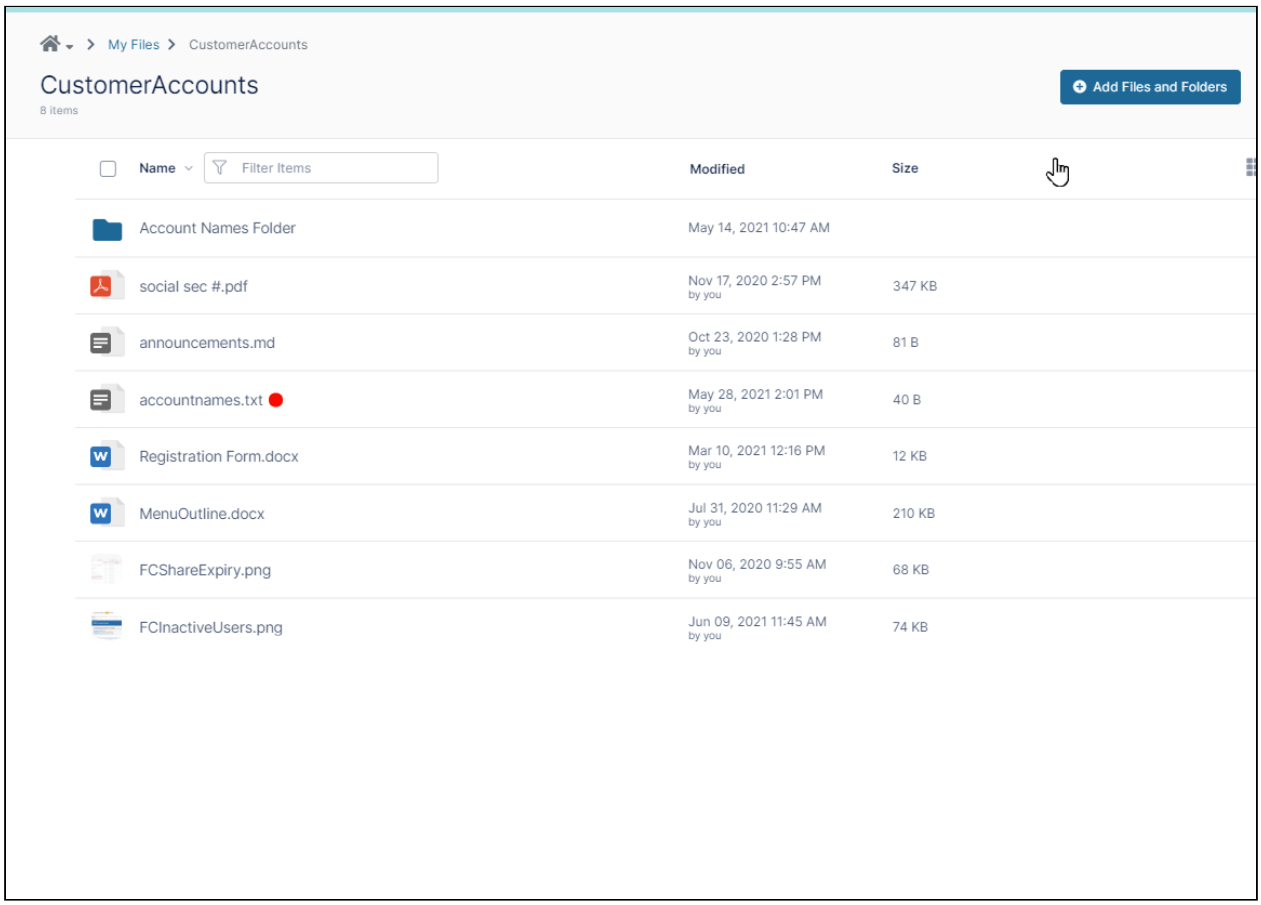
- **Automatically on a file activity** - The workflow begins when a file on a specific path is created, updated, downloaded, or previewed, or when a folder on a specific path is created.

Parameter	Required/Optional	Description
Limited to Path	Required	Folder path on which the file action occurs.
File Event	Required	Choose from a list of events, such as **If file is created** or **If file is downloaded or previewed**.

- **Automatically on a share activity** - The workflow begins when a share is created or updated, or when the share content is modified. You may limit the trigger to only set off the workflow when the share occurs on a certain path, such as a certain Team folder.

Parameter	Required/Optional	Description
Share Event	Required	Choose either: **If share is created or updated**. or **If share is created or updated or share content is modified.** **Note**: Share is updated when one of its share options changes. Share content is modified when content in the file shared changes, or, if the share is a folder, when a new file is added to the folder or a file within the folder is updated.
Limited to Path	Optional	Folder path on which the share action occurs.

- **Started by user on a file** - The workflow is triggered for a file when a user in the user portal chooses it in the context menu for the file in the following manner:



Note: There are no parameters for this trigger.

- **Started based on a timer** - The workflow runs at a specified start time. You may also specify an end time and a frequency of once, daily, or weekly, or periodically (every 5 minutes).

Parameter	Required/Optional	Description
Start DateTime	Required	Date and time the workflow begins running.
Periodic	Optional - defaults to **Run Once**	How often the workflow runs. Options are **Run Once**, **Periodically** (every 5 minutes), **Daily**, or **Weekly**.
End DateTime	Optional	Date and time the workflow stops running.

Workflow Steps

⚠ Beginning with FileCloud 23.1, notifications sent from **Wait for Share Approval** and **Wait for File Approval** workflows include a link for accessing the approval screen.

When you first add a workflow, its only steps are **Start** and **Complete**. To build the workflow, drag and drop steps from the right panel onto the + symbols on the workflow, and fill in parameters that are required or optional for each step.

Most steps are available to all types of workflows, but a few are only included as choices in workflows triggered by a share activity.

The following table explains the behavior of each type of workflow step and defines its parameters.

Step	Description	Parameters	Workflow types (triggers)
Start	Begins running the workflow when the specified trigger occurs.	Depends on the trigger See Workflow Triggers	All
Condition	A condition defined by the user. If the condition is true, an action occurs; if it is not true a different action occurs	**Node Name** - Name of the node. **Node Description** - For informational purposes; describes the node. **Query** - Query that checks for the condition. You can either enter the query using the query builder provided or choose **Text Editor (Advanced)** and enter the query freehand.	All
Assign Variable Value	Sets a variable to a value that may be used within the workflow.	**Node Name** - Name of the node. **Node Description** - For informational purposes; describes the node. **Variable Name** - A variable you define for the workflow. **Value** - A value you give to the variable from system or workflow data, such as the file path or the current date, or that you enter freehand.	All

Step	Description	Parameters	Workflow types (triggers)
Copy File	Copies the file from **Source Path** to **Target Path**.	**Node Name** - Name of the node. **Node Description** - For informational purposes; describes the node. **Source Path** - Current path of the file. **Target Path** - Path to copy the file to. **Override** - Check to overwrite file of the same name if it exists; leave unchecked to save both existing and new files.	All
Move File	Moves the file from the **Source Path** to **Target Path**.	**Node Name** - Name of the node. **Node Description** - For informational purposes; describes the node. **Source Path** - Current path of the file. **Target Path** - Path to move the file to. **Override** - Check to overwrite file of the same name if it exists; leave unchecked to save both existing and new files.	All
Create Directory	Creates the directory specified in **Target Path**	**Node Name - Name of the node.** **Node Description - For informational purposes; describes the node.** **Target Path** - Choose existing path to create the directory in and append the new directory name.	All

Step	Description	Parameters	Workflow types (triggers)
Wait for File Approval	Requests approval for a file action. Approvers are automatically notified in their user portals.	**Node Name** - Name of the node. **Node Description** - For informational purposes; describes the node. **Approval Emails** **Users** - Emails of users who may approve the action. Notifications are sent to these users. **Groups** - Groups whose users may approve the action. Notifications are sent to users who are members of the group at the time the approval is requested. **Approval Count Number** - Number of approvals required for the file action to occur. **Custom Message** - The default message is **Please, approve this file**. Select this text and type over it to change the message. **Send Approval Email Notification** - Sends an email to approvers with a link to the Action screen for approving the file. This appears in addition to the user interface notification.	All except **Automatically on a share activity**

Step	Description	Parameters	Workflow types (triggers)
Wait for Share Approval	Requests approval for a file or folder share. Approvers are automatically notified in their user portals. See Share Approval Workflows.	**Node Name** - Name of the node. **Node Description** - For informational purposes; describes the node. **Approval Emails** **Users** - Emails of users who may approve the action. Notifications are sent to these users. **Groups** - Groups whose users may approve the action. Notifications are sent to users who are members of the group at the time the approval is requested. **Approval Count Number** - Number of approvals required for the share to become active. **Custom Message** - The default message is **Please, approve this share**. Select this text and type over it to change the message. **Send Approval Email Notification** - Sends an email to approvers letting them know there is an active share approval request. This appears in addition to the user interface notification.	**Automatically on a share activity**
Share Approve	This action is triggered if a share in **Wait for Share Approval** is approved. It makes the share available to recipients. See Share Approval Workflows.	**Node Name** - Name of the node. **Node Description** - For informational purposes; describes the node.	**Automatically on a share activity**
Share Rejection	This action is triggered if a share in **Wait for Share Approval** is rejected. It deletes the share. See Share Approval Workflows.	**Node Name** - Name of the node. **Node Description** - For informational purposes; describes the node.	**Automatically on a share activity**

Step	Description	Parameters	Workflow types (triggers)
Send Email	Sends an email message to the **To** recipients.	**Node Name** - Name of the node. **Node Description** - For informational purposes; describes the node. **To** - Recipient email addresses **Subject** - Subject of email. **Body** - Body of email.	All
Complete	Exits workflow processing	none	All

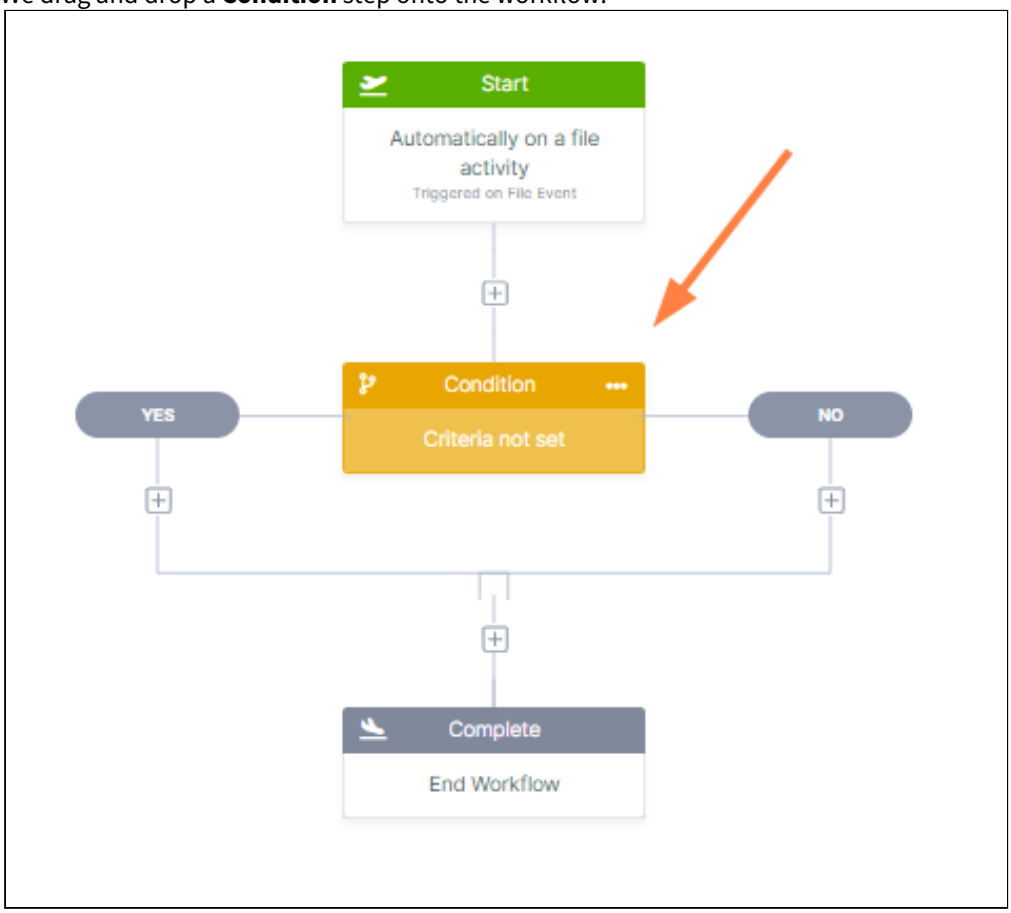
Creating a Workflow Query

When you add a condition to a workflow, you are prompted to enter the query for determining if the condition is true or false. Some common queries entered include:

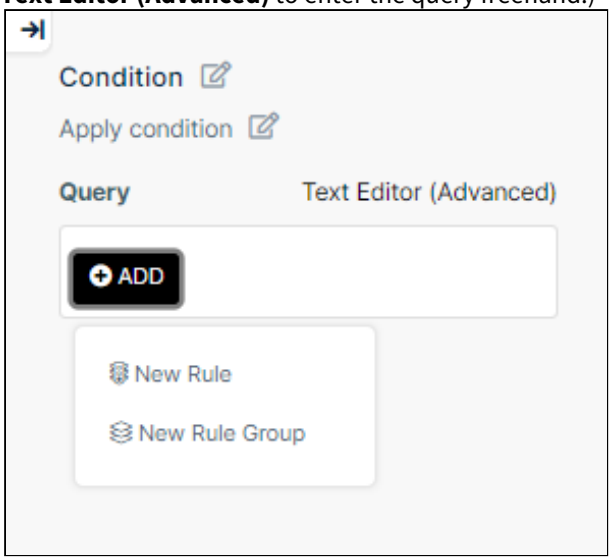
- Is the file greater than a specific size?
- Is a value above a specific dollar amount?
- Is the user who performed the action an External (or Guest or Full) user?

To create a query for a condition:
In the following example, we'll create a query that checks if an uploaded invoice file is for an amount greater than $500, and if it is, we'll send it for approval. Following the step by step procedure is a video that shows you the complete process at once.

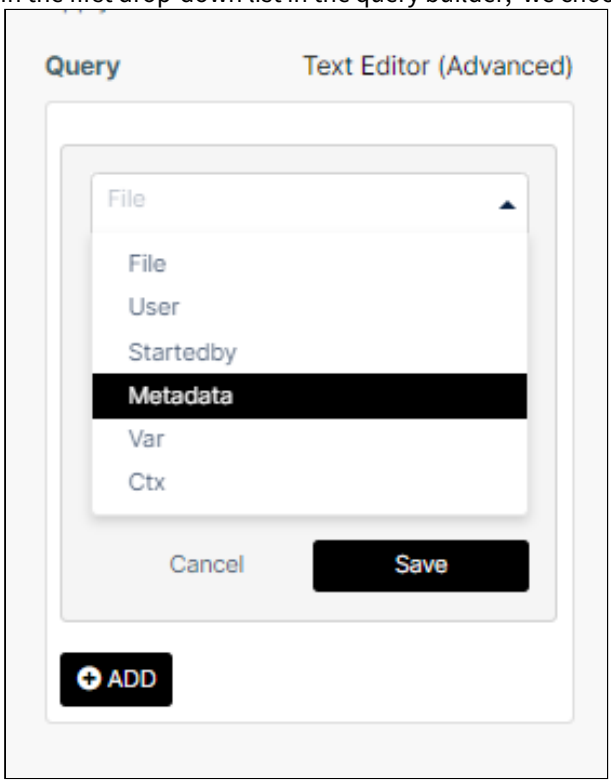
1. We drag and drop a **Condition** step onto the workflow.



2. Then, we click **Add** in the right panel to add a query using the query builder. (Alternately, we could have clicked **Text Editor (Advanced)** to enter the query freehand.)



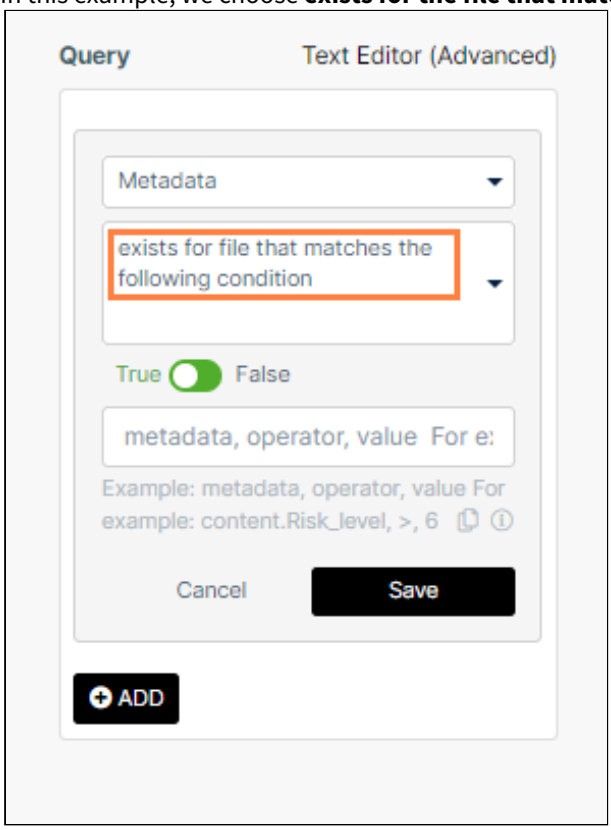
3. **New Rule** adds a one-rule condition. **New Rule Group** creates a multiple-rule condition.
   In this example, we choose **New Rule**.
   The query builder opens.
   In the first drop-down list in the query builder, we choose the part of the workflow that the query is evaluating.



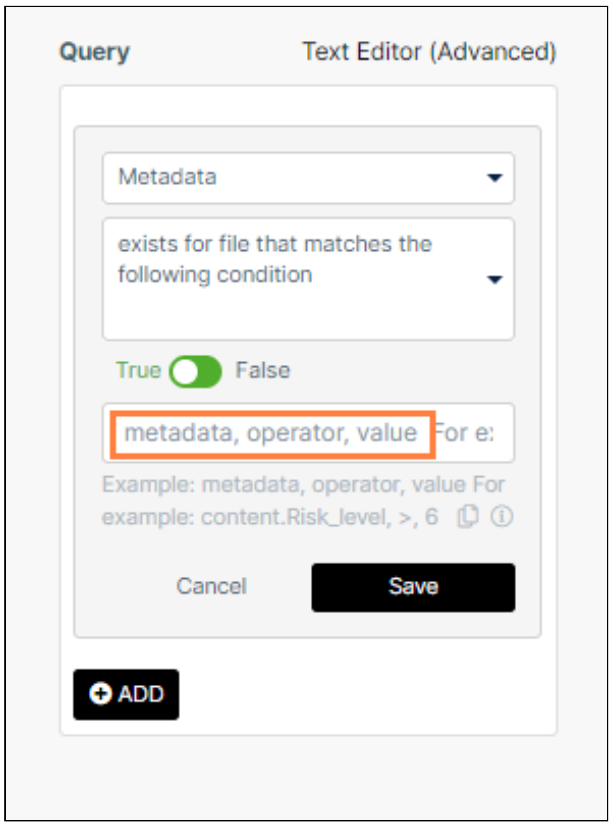
   The options vary depending on the workflow trigger initially chosen.
   For a list with definitions of the available workflow query options, see Workflow Query Options.

4. In this example, we choose **Metadata**.
   The next drop-down list in the query builder includes conditions that vary depending on the option chosen.
   For a list with definitions of of the available query conditions for each option, see Workflow Query Conditions.

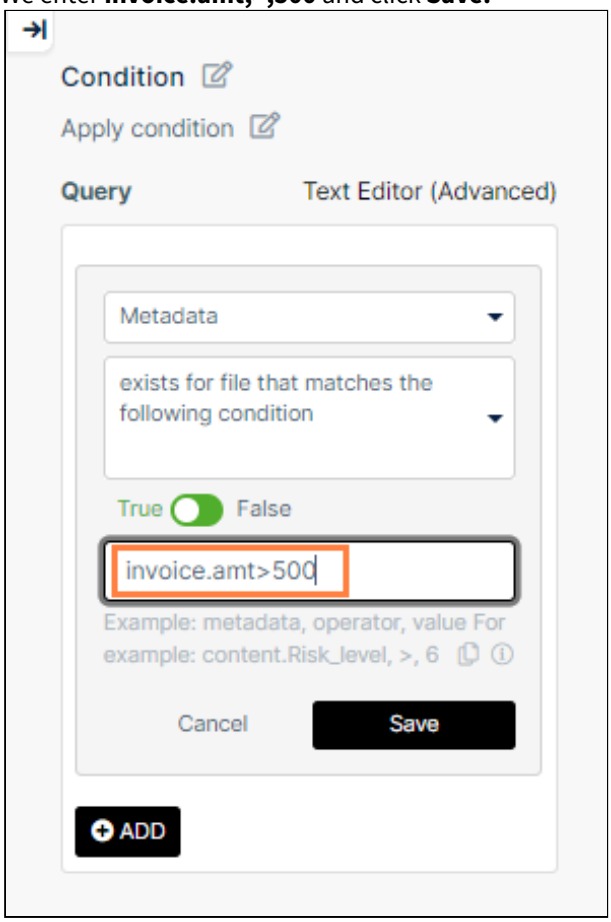
5. In this example, we choose **exists for the file that matches the following condition**.



6. The condition can be set to **True** or **False**. Here, we leave it at **True**.
   The query editor indicates the format for the final part of the query. In this case it is **metadata, operator, value**:

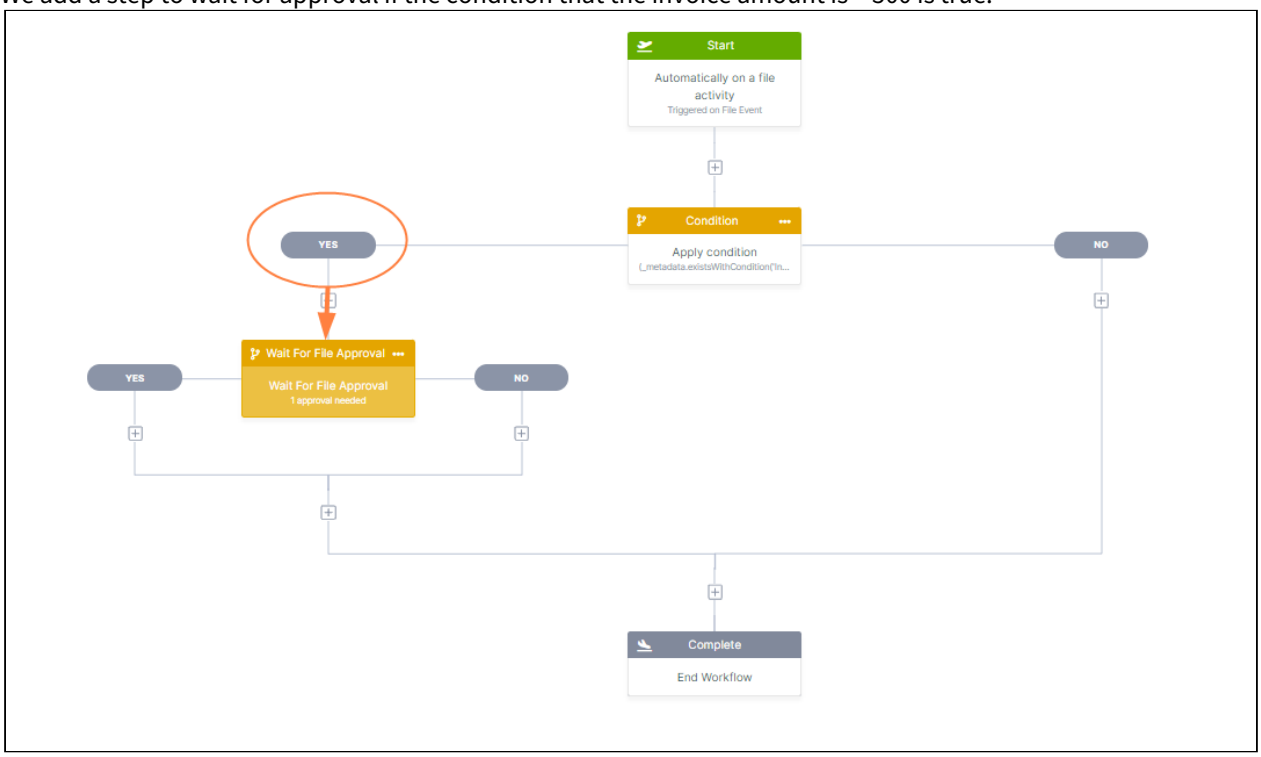

Query
Text Editor (Advanced)
Metadata
exists for file that matches the following condition
True
False
metadata, operator, value
For e:
Example: metadata, operator, value For example: content.Risk_level, >, 6
Cancel
Save
ADD

7. We enter **invoice.amt,>,500** and click **Save.**



The condition is complete. Now, we can add a workflow step that occurs either when the condition is found true or when it is found false, or both.

8. We add a step to wait for approval if the condition that the invoice amount is > 500 is true.



The following video shows the same query being created:

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But you can reach it using the following URL:

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Workflow Query Options

In the the workflow query builder, you first choose the area of the workflow that the query is evaluating. The following table defines the available options:

Option	Description	Trigger
File	Checks the value of file data, such as the file path or file owner.	Automatically on a File Activity Started by a user on a file
Share	Checks the value of share data, such as the user who created the share.	Automatically on a Share Activity

Option	Description	Trigger
User	Checks the value of data for user who created the workflow, such as the user name or the user's last login.	Automatically on a File Activity Automatically on a Share Activity Started by a user on a file
Startedby	Checks the value of data related to the user who performed the file activity that triggered the workflow, such as the user's email or total storage.	Automatically on a File Activity
Metadata	Checks if a certain metadata attribute exists for the file, and if it does, what its value is.	Automatically on a File Activity Started by a user on a file
Var	Only appears if the workflow creator has added a custom variable to the workflow and the workflow has been saved. See **Assign Variable Value** in Workflow Steps for help adding an **Assign Variable Value** step. Checks if the variable has the value specified.	Automatically on a File Activity Automatically on a Share Activity Started by a user on a file
If Var current date matches	Checks if the current date/time matches the date/time when the timer is set.	Started based on a timer
Ctx (Context)	Checks the value of the current date, the current date and time, or the workflow name.	Automatically on a File Activity Automatically on a Share Activity Started by a user on a file

Workflow Query Conditions

In the workflow query builder, after you choose the area of the workflow that you are querying, you must choose a condition related to that area. The following tables define the available conditions for each area of the workflow.

File Conditions

Condition	Description	Example
path equals	Checks if the filename with its full path is/is not this value.	If the full file path is **/myuser/mydir/myfile.pdf**

Condition	Description	Example
Parent path equals	Checks if the directory of the file is/is not this value.	If the file's directory is **/myuser/mydir**
extension is	Checks if the file extension is/is not this value.	If the file extension is **txt**
size is	Checks if the file size falls within the range indicated.	If the file size is **> 100000 or < 500000** in bytes
owner is	Checks if the file owner is/is not the user specified.	If the file owner is **aliahberk**
owner's email is	Checks if the file owner's email is/is not the email specified.	If the file owner's email is aliahberk@example.com
path starts with	Checks if the file path begins/does not begin with the directories specified.	If the file's directory starts with **/myuser/mydir**
path contains	Checks if the file path contains/does not contain the folder directory specified.	If the file's directory contains **mydir** in its path
path matches	Checks if the text specified has a match/does not have a match in the file path.	If the file directory has ***dir*** anywhere in it

Share Conditions

Condition	Description	Example
path equals	Checks if full path of share is/is not this value.	If share path is **/myuser/mydir/myfile.pdf**
type is	Checks if share is/is not public or private. Valid values are **public** and **private**.	If share is **public**
created by	Checks if the share owner is/is not the user specified.	If the share owner is **jaredmc**
created by user with email	Checks if the share owner's email is/is not the email specified.	If the share owner's email is jaredmc@example.com

Condition	Description	Example
is public	Checks if the share is/is not public	If **is public = False** (if the share is private)
is directory	Checks if the share is a file or folder	Is **Share is directory = True** (if share is a folder)
allowed users contains email	Checks if the users added to the share include this email	If users added to share include maurap@example.com
allowed groups contains group	Checks if the groups added to the share included this group	If groups added to share include **Accounting**
users contains email domain	Checks if the users added to the share include/do not include this email domain	If users added to share include the email domain gmail.com
users are ONLY from domain	Checks if the users added to the share are only/are not only from the email domain	If users added to share are only from the email domain verizon.com
path starts with	Checks if the share path begins/does not begin with the directories specified.	If the share path's directory starts with **/myuser/mydir**
path contains	Checks if the share path contains/does not contain the folder directory specified.	If the share path's directory contains **mydir** in its path
path matches	Checks if the text specified has a match/ does not have a match in the share path.	If the share path's directory has ***dir*** anywhere in it

User Conditions (**User** is user who created the workflow)

Condition	Description	Example
User name is	Checks if the workflow creator's username is/is not this value.	If the workflow creator's username is **aliahberk**
User email is	Checks if the workflow creator's email is/is not this value.	If the workflow creator's email is aliahberk@example.com

Condition	Description	Example
User type is	Checks if the workflow creator's user type is/is not this value. Valid values are **Full Access**, **Limited Access**, and **Guest Access**.	If the workflow creator's user type is **Full Access**.
User's last logged is	Checks if the workflow creator's last log-in date is prior to the value indicated.	If the workflow creator's last log-in date is **<2023-08-30**
User's total storage in GB is	Checks if the workflow creator's total storage in GB is greater than the specified value.	If the workflow creator's total storage is **>100GB**
User is part of group	Checks if the workflow creator is\is not part of the group specified.	If the workflow creator is part of the **Accounting** group.
User's email domain is in	Checks if the workflow creator's email domain is\is not the domain(s) specified	If the workflow creator's email domain is not gmail.com

Startedby Conditions (**Startedby** is the user who performed the action that triggered the workflow)

Condition	Description	Example
Started by User name is	Checks if the startedby user's username is/is not this value.	Checks if the startedby user's username is **jaredmc**
Started by User email is	Checks if the startedby user's email is/ is not this value.	If the startedby user's email is jaredmc@example.com
Started by User type is	Checks if the startedby user's user type is/is not this value.	If the startedby user's user type is **Full Access**, **Limited Access**, or **Guest Access**
Started by User's last logged is	Checks if the startedby user's last log-in date is prior to the value indicated.	If the startedby user's last log-in date is **<2023-08-15**
Started by User's total storage in GB is	Checks if the startedby user's total storage in GB is greater than the specified value.	If the startedby user's total storage is **> 200GB**
Started by User is part of group	Checks if the startedby user is\is not part of the group specified.	If the startedby user is part of the **Marketing** group.

Condition	Description	Example
Started by User's email domain is in	Checks if the startedby user's email domain is\is not the domain(s) specified	If the startedby user's email domain is mycompany.com

Metadata Conditions

Condition	Description	Example
Exists for the file	Checks if the metadata and metadata attribute specified exist/do not exist for this file.	If **cce.pii** exists as a metadata group and attribute.
Exists for the file with value	Checks if the metadata and metadata attribute with the given value exist/do not exist for this file.	If **cce.pii** exists and is equal to **yes**
Exists for the file with value in array	If the metadata and a metadata attribute with one of the values in the array exist/do not exist for this file.	If **cce.pii** exists and is equal to one of the following: **yes**, **y**, **unknown**
Exists for the file that matches the following condition	If the metadata and a metadata attribute matching the condition given exist/do not exist.	if **invoice.amount** exists and is **> 500**

Var Conditions

Condition	Description	Example
<var name> matches	If the value of the variable is equivalent/is not equivalent to the value(s) indicated.	If **filecount > 1000**

If Var current date matches

This condition only applies to the trigger **Started based on a timer**. The condition is already defined as **if Var Current date matches** and no other conditions may be selected.

Ctx Conditions

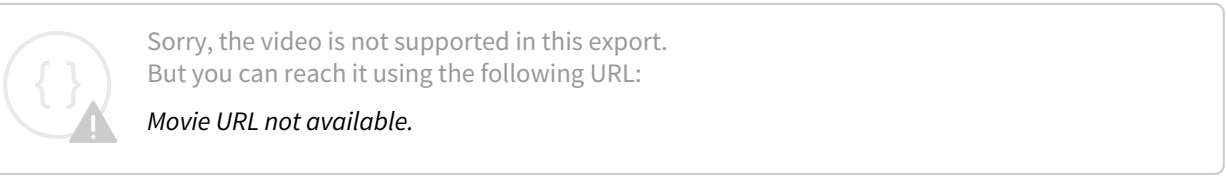
Condition	Description	Example
Current date matches	If the current date is equivalent/is not equivalent to the value(s) specified.	If the current date is **StartDate**

Condition	Description	Example
Current date and time matches	If the current date is equivalent/is not equivalent to the value(s) specified.	If the current date and time is greater than **StartDateTime** and less than **EndDateTime**
Workflow Name matches	If the workflow name matches/does not match the name specified.	If the workflow name is **CreateDirectory**

Edit the Parameters in a Workflow Step

To edit the parameters in a Workflow step:

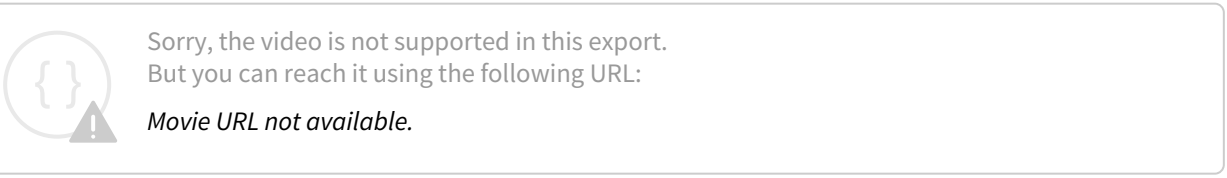
1. In the **Workflow** list, hover over the workflow and click the edit icon.
   The workflow opens in the drag and drop workspace.
2. Click the step that you want to edit.
3. Change the parameters in the right panel, and click **Save**.
4. At the top of the workspace, click **Save Workflow**.



Remove a Step from a Workflow

To remove a step you have added to a workflow:

1. In the drag-and-drop workspace, click the three dots in the upper-right corner of the node for the step.
2. Click **Remove**.
3. Confirm removal by clicking **Delete**.
   The node disappears.
4. Click **Save Workflow** to save your change.



Using Variables in Workflows

You can make your workflows more robust by adding variables to them, for example, to:

- Insert a new file into a folder named with the current date.

- Send an email to a reviewer with the name and path of a file that requires review.
- Send an email with the share name and share owner to an auditor when a share is approved.

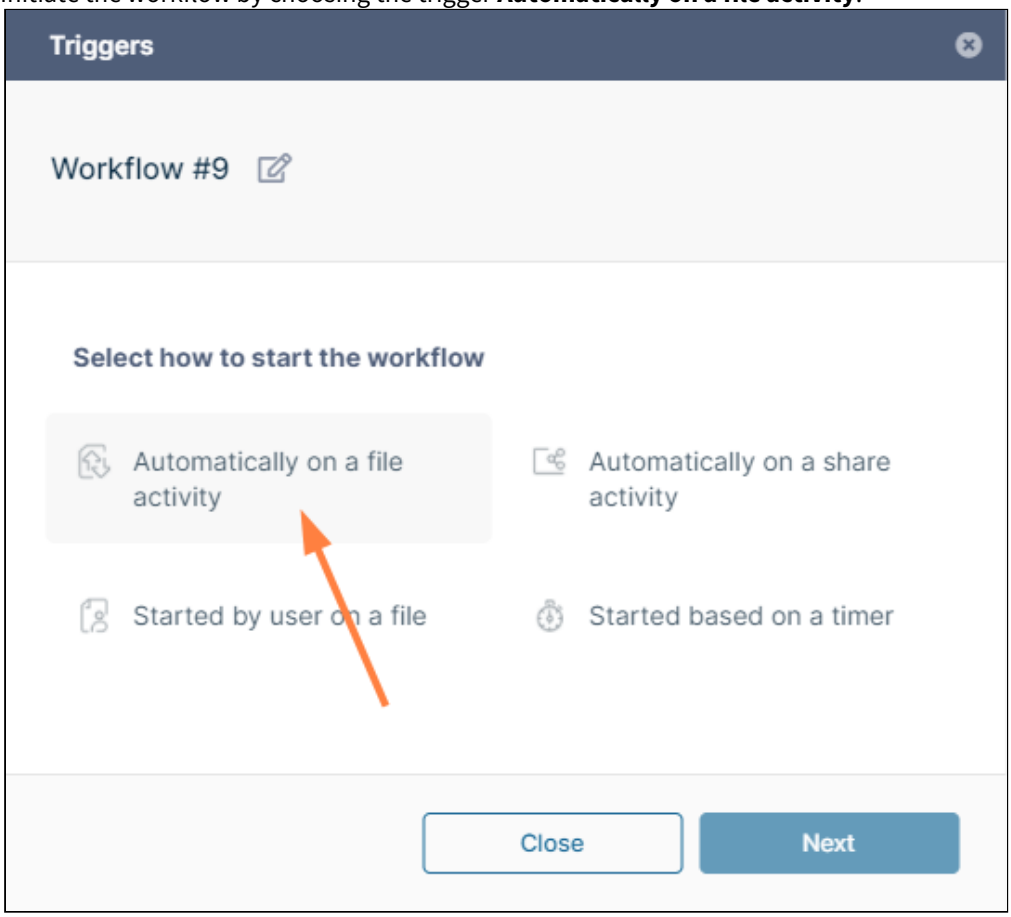
You can either create variables or use file, user, or system metadata as variables (for example, file size, file creator username, and current date).

The following procedures show you how to set up some of the scenarios described above, but these are only a starting point. Use variables to add any functionality and information to your workflows that is useful to you.

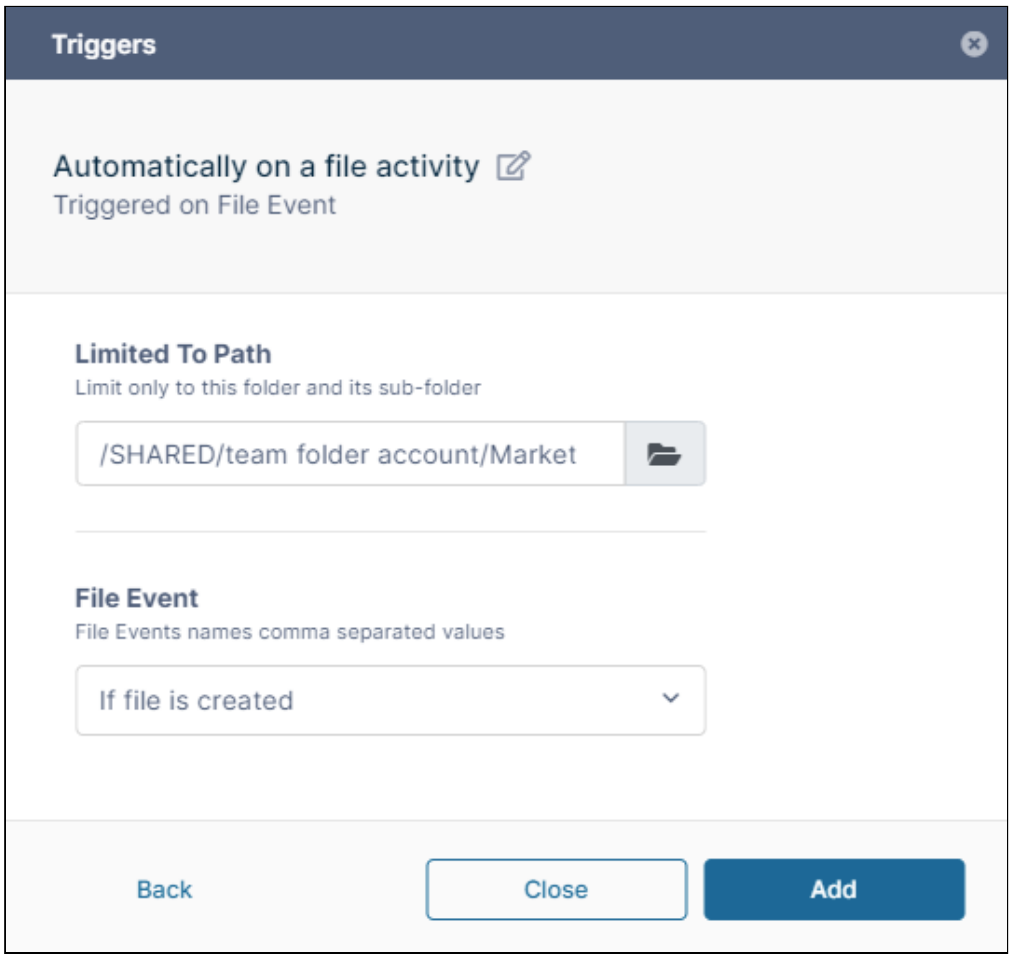
Insert new files into folders named with the create date

Here, we'll show you how to make it easy to find files created on certain dates by storing them in folders named with the create date. This could be useful, for example, if you want to keep track of when certain files were uploaded to a team folder.

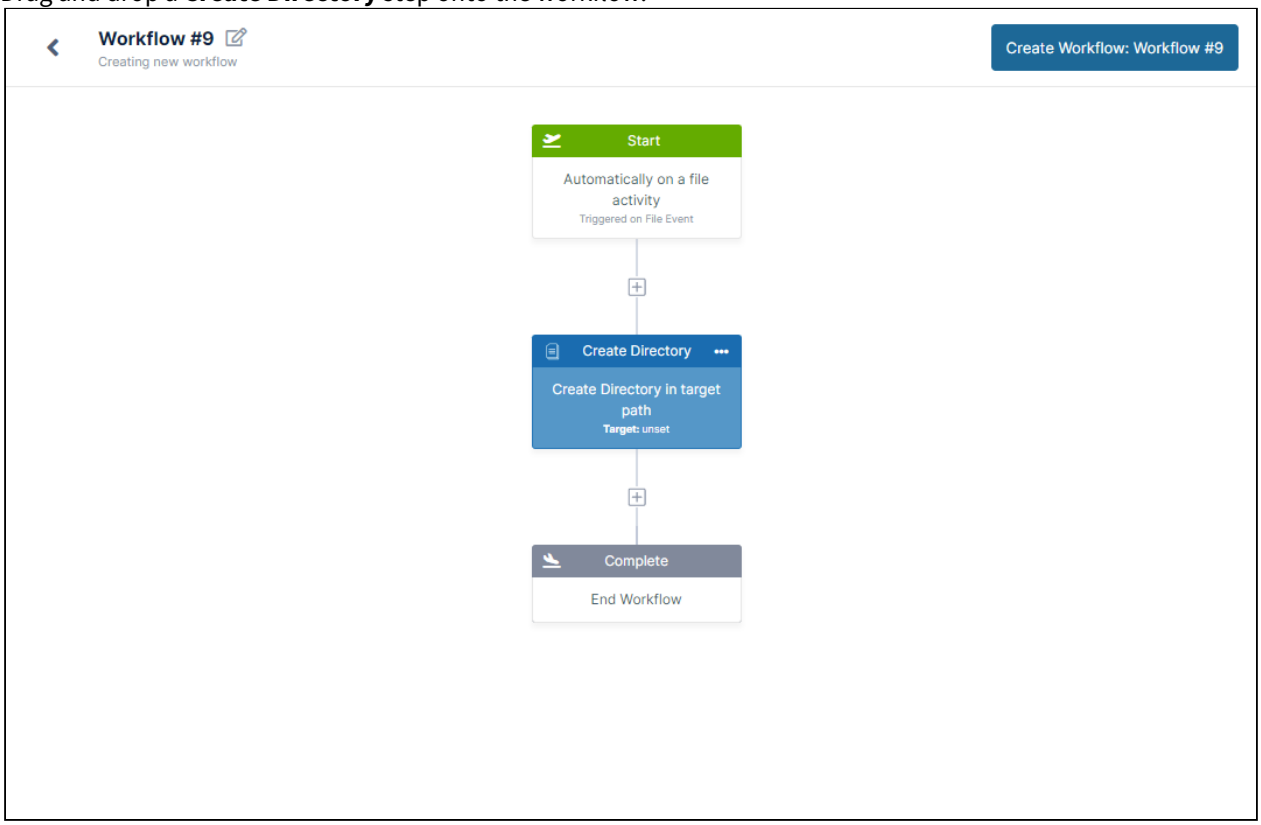
1. Initiate the workflow by choosing the trigger **Automatically on a file activity**.



2. In **Limited to Path**, choose the folder path where the files are uploaded or created and in **File Event**, select **If a file is created**, and click **Add.**

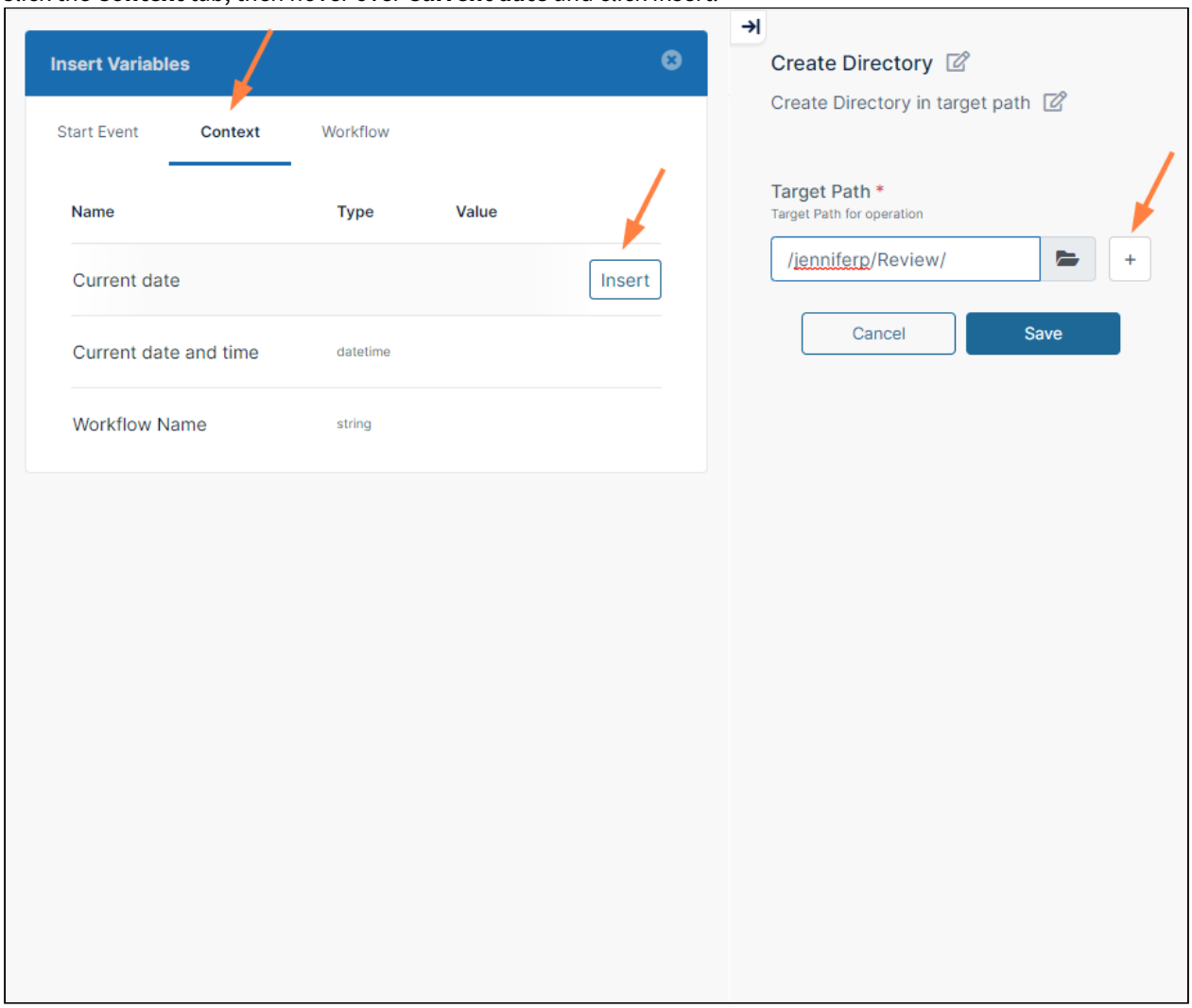

Triggers
Automatically on a file activity
Triggered on File Event
Limited To Path
Limit only to this folder and its sub-folder
/SHARED/team folder account/Market
File Event
File Events names comma separated values
If file is created
Back
Close
Add

3. Drag and drop a **Create Directory** step onto the workflow.

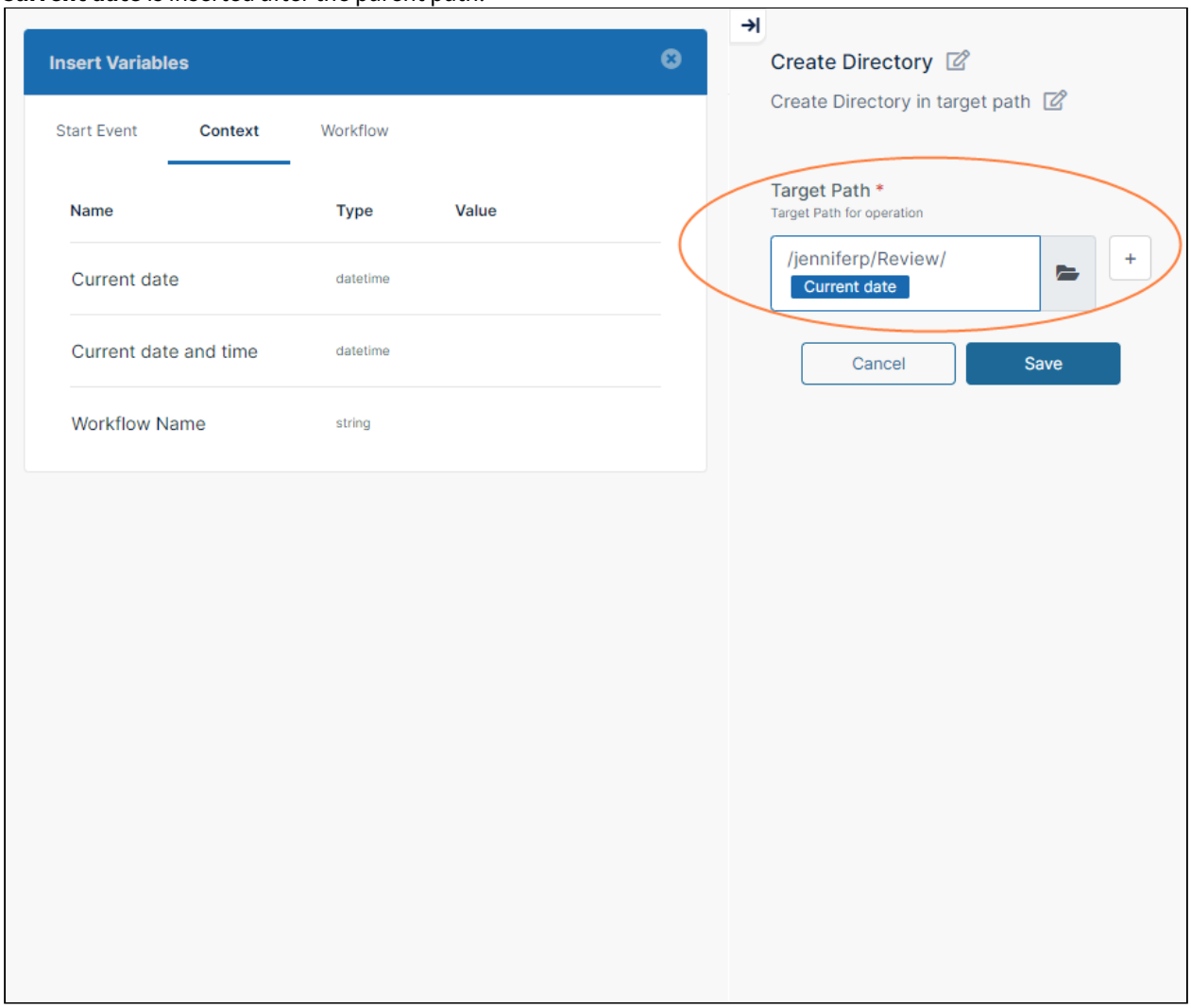


4. Set the **Target Path** to the parent path where you want the file to be copied, and then add "/", and then click **+**. The **Insert Variables** box opens.

5. Click the **Context** tab, then hover over **Current date** and click Insert.

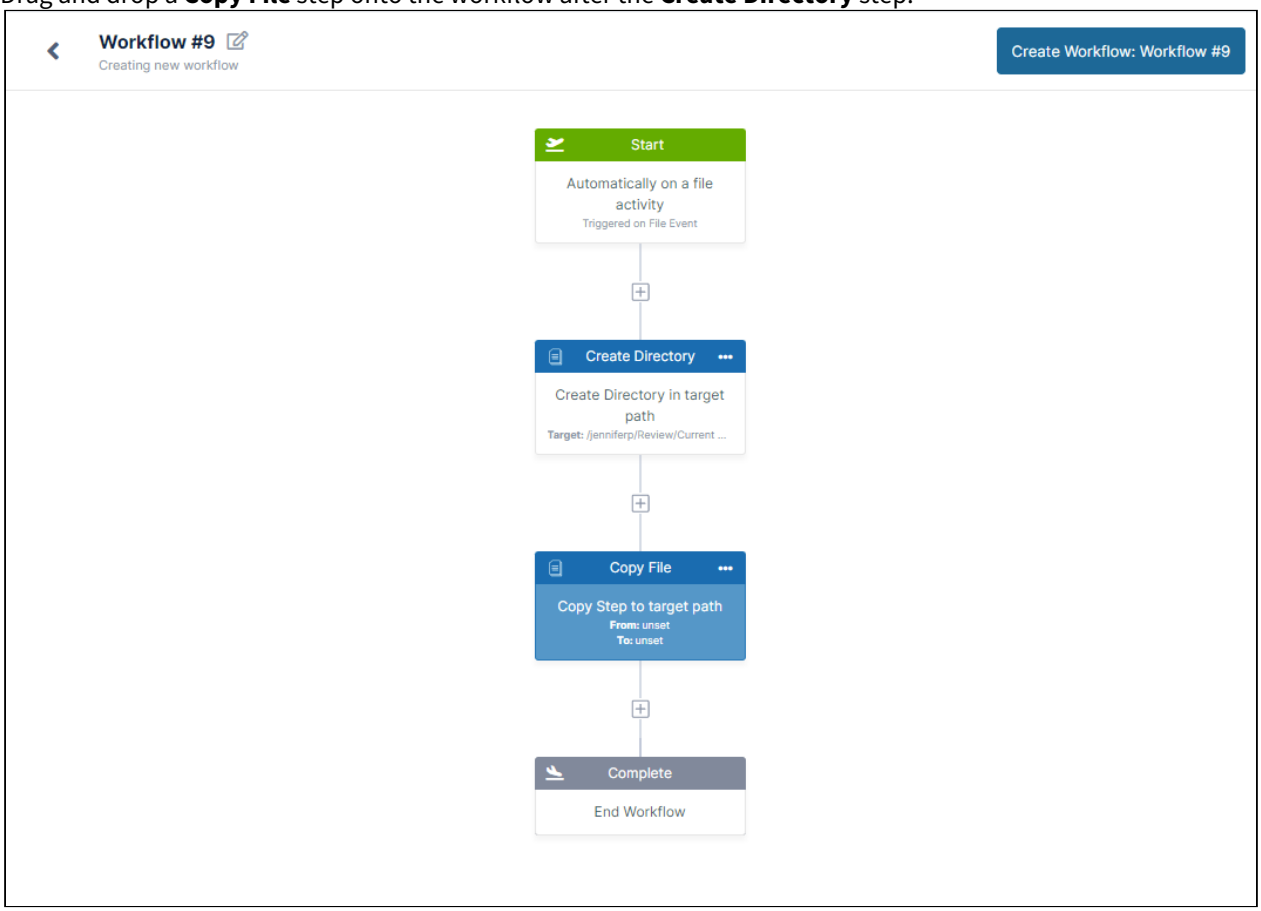


Current date is inserted after the parent path.



6. Click **Save** to save your **Target Path**.

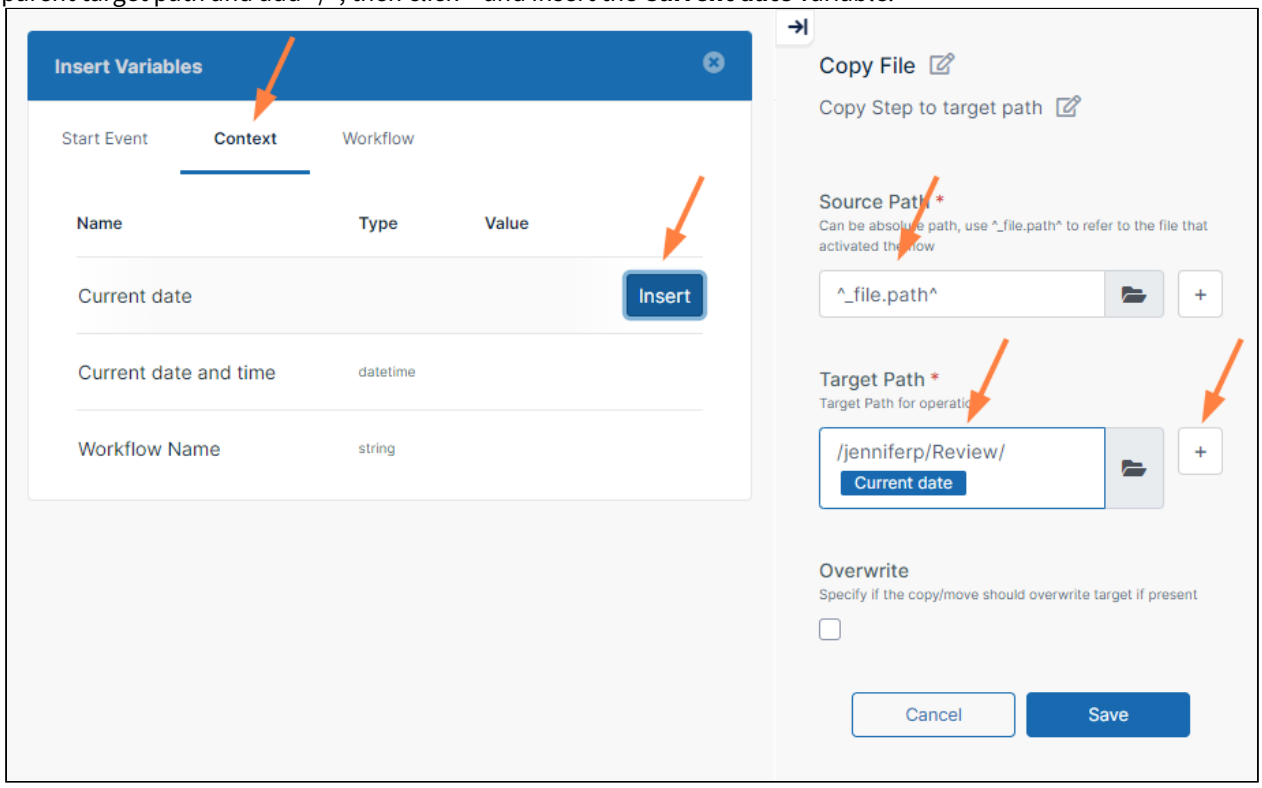
7. Drag and drop a **Copy File** step onto the workflow after the **Create Directory** step.



8. Into **Source Path**, enter
   `^_file.path^`

   to indicate the file path + the filename.

9. Set **Target Path** to the exact value that you used for **Target Path** in the **Create Directory** step (choose the parent target path and add "/", then click **+** and insert the **Current date** variable.



10. Click **Save** to save your parameters.
11. Give your workflow a name, and click **Save Workflow**.

Let's see how this works when we upload a file into the source path. In the following video, we add the file **About FileCloud** to our **Marketing** team folder. We can see that the workflow functioned correctly - it added a folder named with the date to the **My Files/Review** folder and copied the **About FileCloud** folder into it.

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But you can reach it using the following URL:

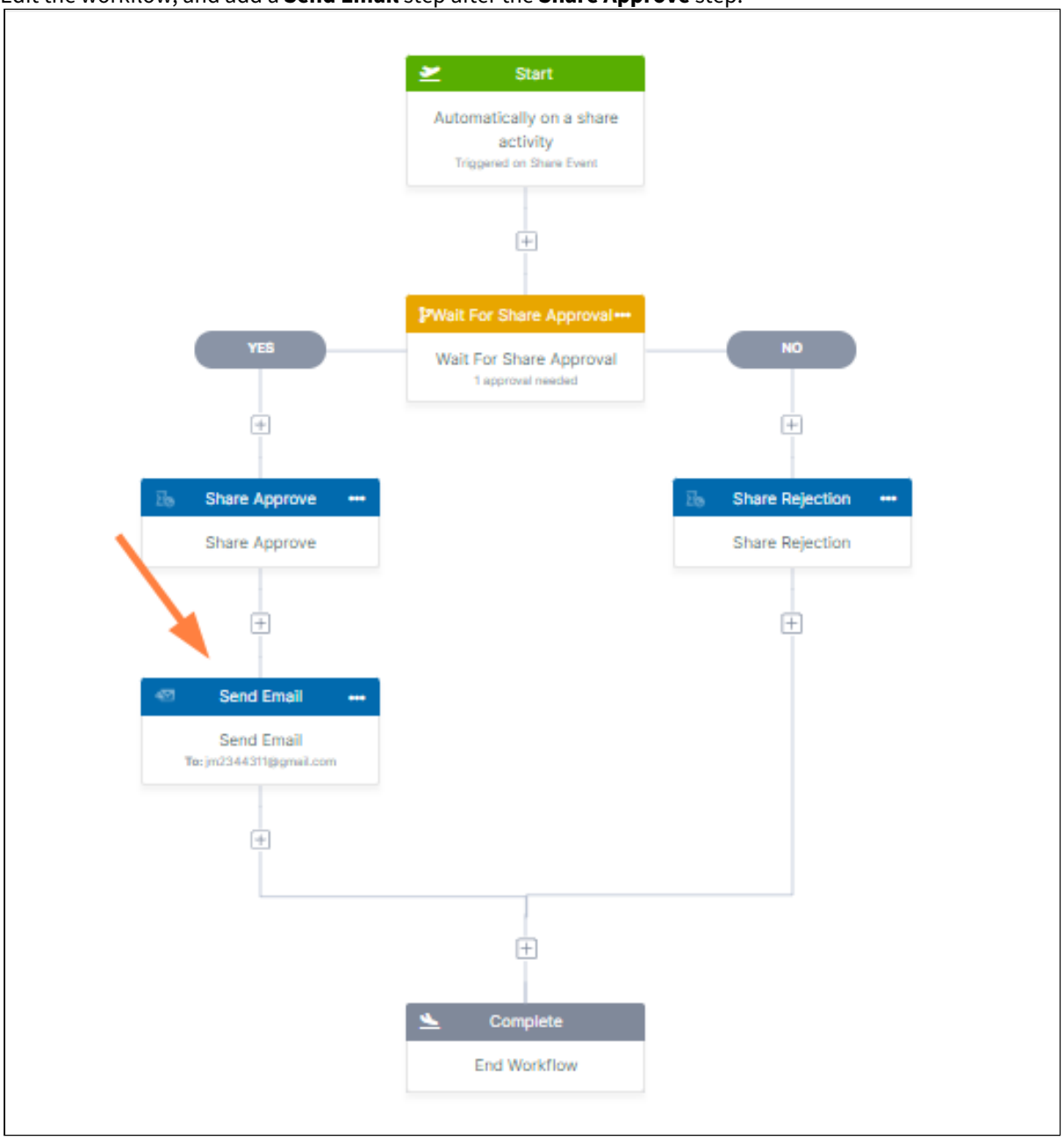
Movie URL not available.

Send an email to an auditor that includes a share name and share recipient

In this example, after a share has been approved, we'll have a workflow send an auditor a notification that includes the name of the share and the share creator.

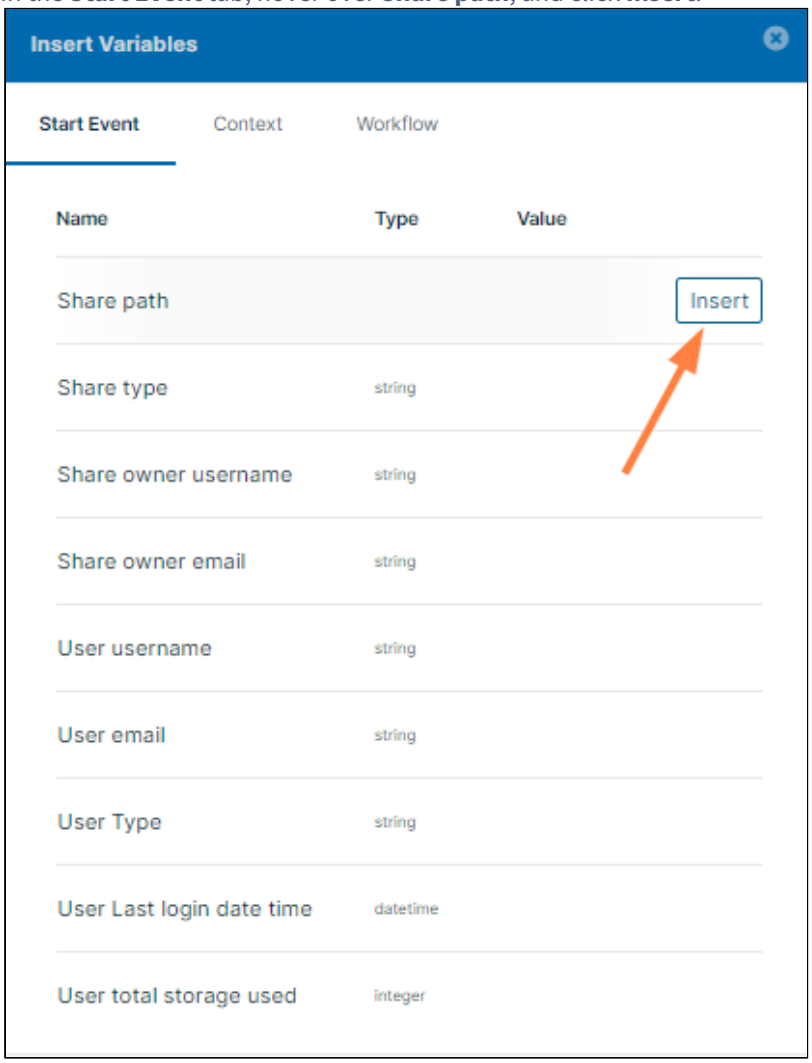
1. Create a Share Approval workflow.

2. Edit the workflow, and add a **Send Email** step after the **Share Approve** step.



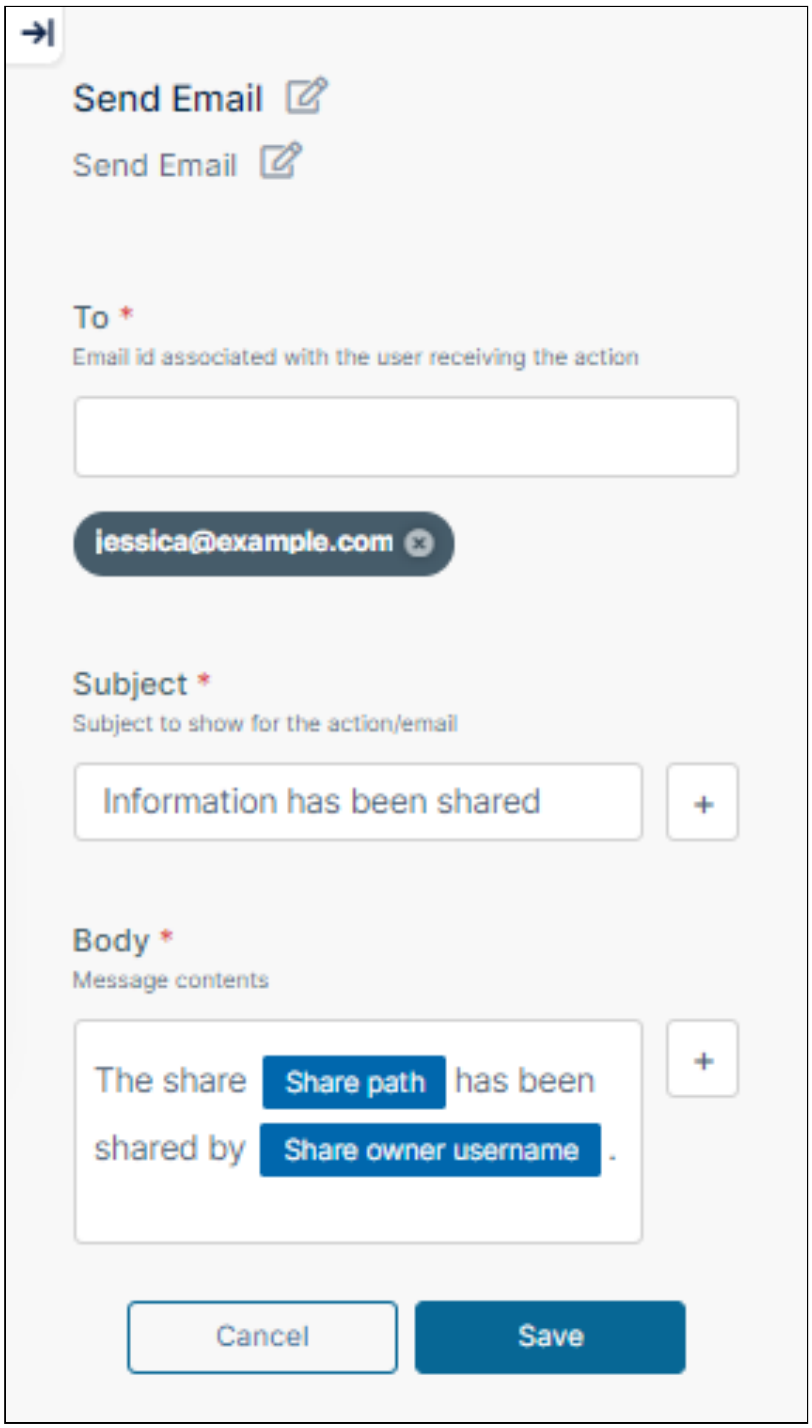
3. In **To**, enter the email address of the auditor.
4. In **Subject**, enter a descriptive subject, such as **Information has been shared.**
5. In **Body**, enter *The share*, and click **+**.
   The **Insert Variables** dialog box opens.

6. In the **Start Event** tab, hover over **Share path**, and click **Insert**.



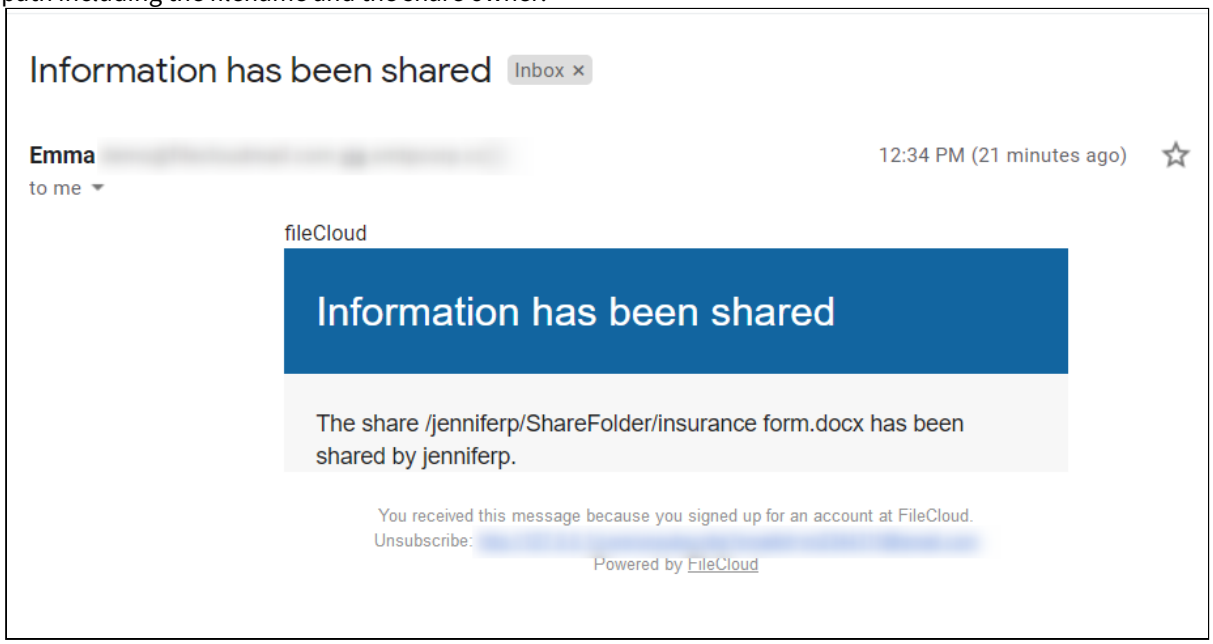
The variable **Share path** is inserted into **Body**.

7. After **Share path**, type *has been shared by*, then click **+** again.
8. In the **Start Event** tab of the **Insert Variables** dialog box, hover over **Share owner username**, and click **Insert**.
   The **Body** of the message is complete.
   The parameters for the **Send Email** node appear as:



9. Click **Save** under **Body**.
10. Give your workflow a name, and click **Save Workflow**.

When an approver approves a share, the following email is sent to the auditor in the **To** address. It includes the share path including the filename and the share owner.



Share Approval Workflows

To create a Share Approval workflow that applies to users other than yourself, you must be a promoted Admin with all User Share privileges.
In addition, required share approvals must be enabled in the FileCloud Admin portal, and your share approval workflow must be selected to make it active.
To ensure that your Share Approval workflow performs correctly, please work with your FileCloud Admin when creating it.

If you are an Admin, see Automated Workflow Management for information on share approval workflow configuration.

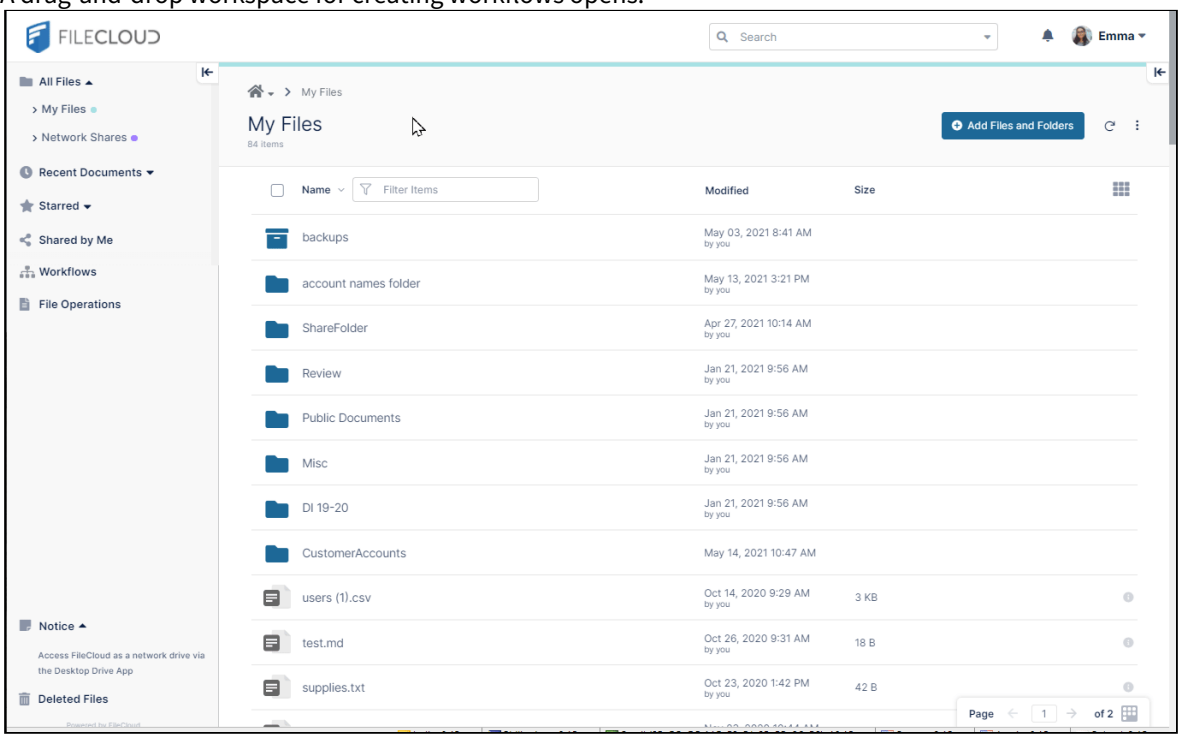
Share approval workflows are a special type of workflow that run when a user creates a share. Instead of automatically making the share available to other users, the share approval workflow sends it to one or more approvers first. If the required number of approvers approve the share, it becomes available; when one user rejects the share it is considered rejected, and it is deleted.

Share approval workflows use the **Automatically on Share activity** trigger and include steps that are specific to share approval.

The following example shows you how to create a basic share approval workflow that requires one approval.

You can create more detailed share approval workflows by including multiple approvers, approval and rejection notifications, and other steps and details.

1. **Go to the drag-and-drop workspace.**
   a. In the navigation panel, click **Workflows**, then, click **Create New Workflow**.
   A drag-and-drop workspace for creating workflows opens:



2. **Choose the Automatically on a share activity trigger.**
   a. Click **Click here to start**.
   This opens a box of triggers to choose from.
   b. Choose **Automatically on a share activity**, the trigger required for a Share Approval workflow, and then click **Next**.
   The **Automatically on a share activity** trigger prompts you to choose a share activity and, optionally, a file path.
   c. Choose either **If a share is created or updated** or **if a share is created or updated or share content modified**.
   d. Click **Add**.
   Start and end nodes appear on the workspace.

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3. **Drag and drop share approval steps onto the workflow**.
   The steps you can add to the workflow appear in the right panel.
   a. Drag and drop the **Wait for Share Approval** step onto the workflow.
      The step has parameters, which appear in the right panel.
   b. In **Approver Emails**, enter an email address of a share approver.

      > Users that you enter into **Approver Emails** must be promoted Admin Users with full User Share privileges or they will not be able to approve shares. Confirm with your FileCloud Admin that your approvers have these permissions before finalizing your workflow.

      You may change **Custom Message** and **Approval Count Number** or leave their default values.
      By default, 1 approval is required; if you increase the number of required approvals, you must increase the number of **Approver Emails**.
      Approvers are notified at the top of their user portal screen that they have pending actions.
   c. Click the + icon where you want to drag the step, and then drag and drop the **Share Approve** and **Share Rejection** steps under **Yes** and **No**.
      If the approver approves the share, **Share Approve** automatically creates the share. If the approver rejects the share, **Share Rejection** automatically deletes it.

      Sorry, the video is not supported in this export.
      But you can reach it using the following URL:

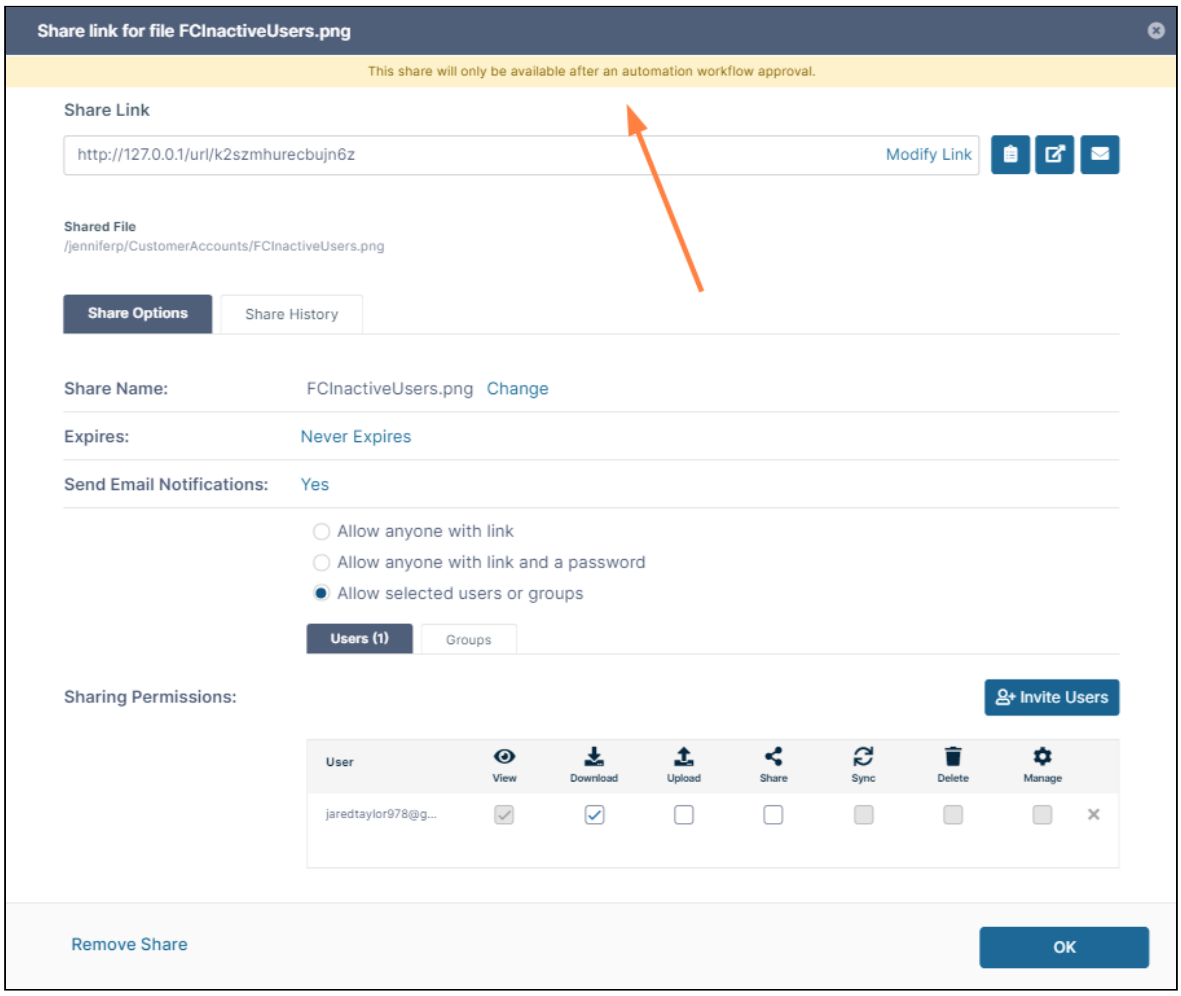
      Movie URL not available.

4. **Name and save the workflow.**
   If you return to the previous page, the new workflow is listed.

   Sorry, the video is not supported in this export.
   But you can reach it using the following URL:

   Movie URL not available.

5. **Test the Share Approval workflow.**
   a. Share a file.
      You should see the message **This share will only be available after an automation workflow approval** at the top of the share dialog box.
      To make it easier to check that share has been made available after it is approved, share it privately with a user.
      Note: If you check Send Email when adding the user, the email is not sent to the user until after the share is approved. Similarly, if you edit the share and click the Send Email button next to the Share Link, a notification informs you that the email cannot be sent.



b. Have the share approver log in to the FileCloud user portal and find and click the **pending action** message at the top of the screen.
c. In the pending actions screen, the approver should click the thumbs up icon to approve the share.

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But you can reach it using the following URL:

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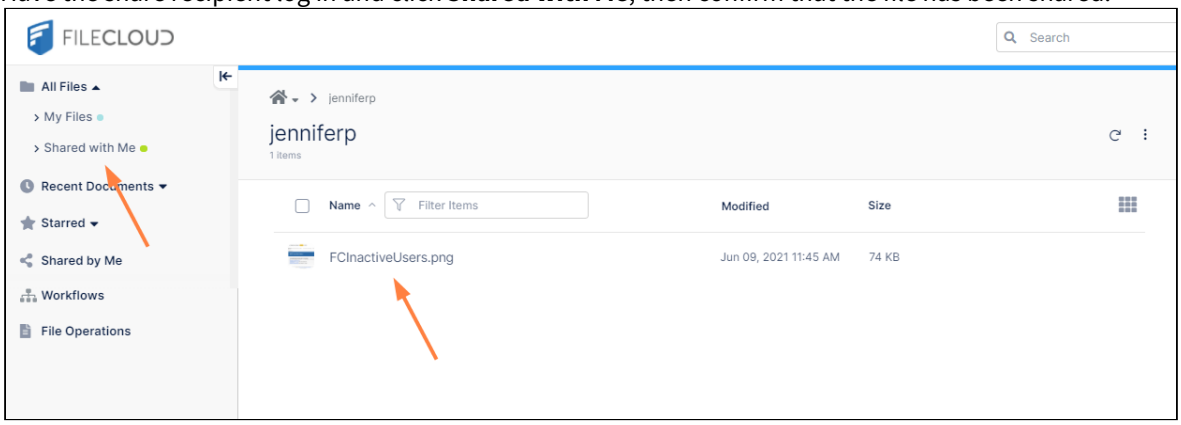
d. Have the share recipient log in and click **Shared with Me**, then confirm that the file has been shared.



e. Repeat this procedure, but have the approver reject the share, and confirm that the share recipient does not see it.

6. Notify your FileCloud Admin of the name of the Share Approval workflow, and request that it be enabled. The workflow will not be active unless your Admin enables Share Approval workflows and specifies this workflow name.

Delete a Workflow

You can see workflows created by you and workflows created by other users in the Workflow listing, but you can only delete workflows that you have created.

To delete a workflow:

1. In the Workflow listing, hover over the workflow and click the Delete icon.
2. Click **Delete** to confirm that you want to delete the workflow.
   The workflow disappears from the file listing.

Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Rename a Workflow

You can rename a workflow if you have created it.

To rename a workflow:

1. In the Workflow list, hover over the workflow and click the Edit icon.
   The workflow opens in the drag-and-drop workspace.
2. In the upper-left corner of the workspace, click the Edit icon.
3. Rename the workflow.
4. Click **Save Workflow**.

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But you can reach it using the following URL:

Movie URL not available.

Workflow Example: PO Approval and Submission

This example shows you how to create a workflow that automatically processes purchase orders from the internal approval phase to the external fulfillment phase.

In the example, a company has a **PO In** folder, where employees can move purchase orders that they want approved. Once a new file is in the folder, the PO approver is sent a notification. The PO approver reviews the purchase order and approves it or rejects it.

If the PO is approved, it is automatically moved to a **PO Approved** folder and an email is sent to the user who processes the PO at the external vendor who can then begin reviewing and fulfilling it.

If the PO is rejected, it is automatically moved to a **PO Rejected** folder and an email is sent to the Purchasing department's email list so the employee who submitted the PO knows its status.

This example can be extended to work with multiple vendors, as shown below under Expanding the example to work for multiple vendors.

One Vendor Workflow Example

This example assumes that you have already added a Purchasing group and Purchasing users, an internal PO Approver user, and an Order Processor user for the external vendor. For help setting up these components, see:

- Manually Create a New User Account
- Import a user account from AD or LDAP Service
- Group Settings

In addition, this example assumes you have a group email set up for your Purchasing group users that includes all of the users in the group.

The example is broken down into the following sections:

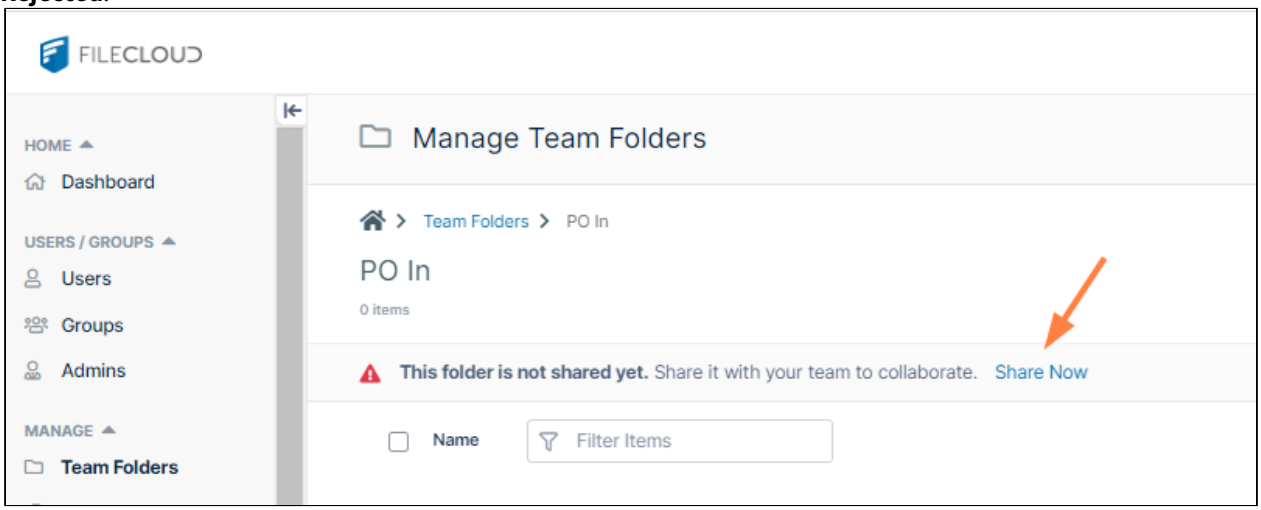
1. Setting up the PO folders and give the Purchasing team, PO approver, and order processor the correct permissions.
2. Setting up the workflow.
3. Testing the workflow.
4. Optionally, setting up processing for multiple vendors.

Set up the Team Folders

For help with Team Folders, see:

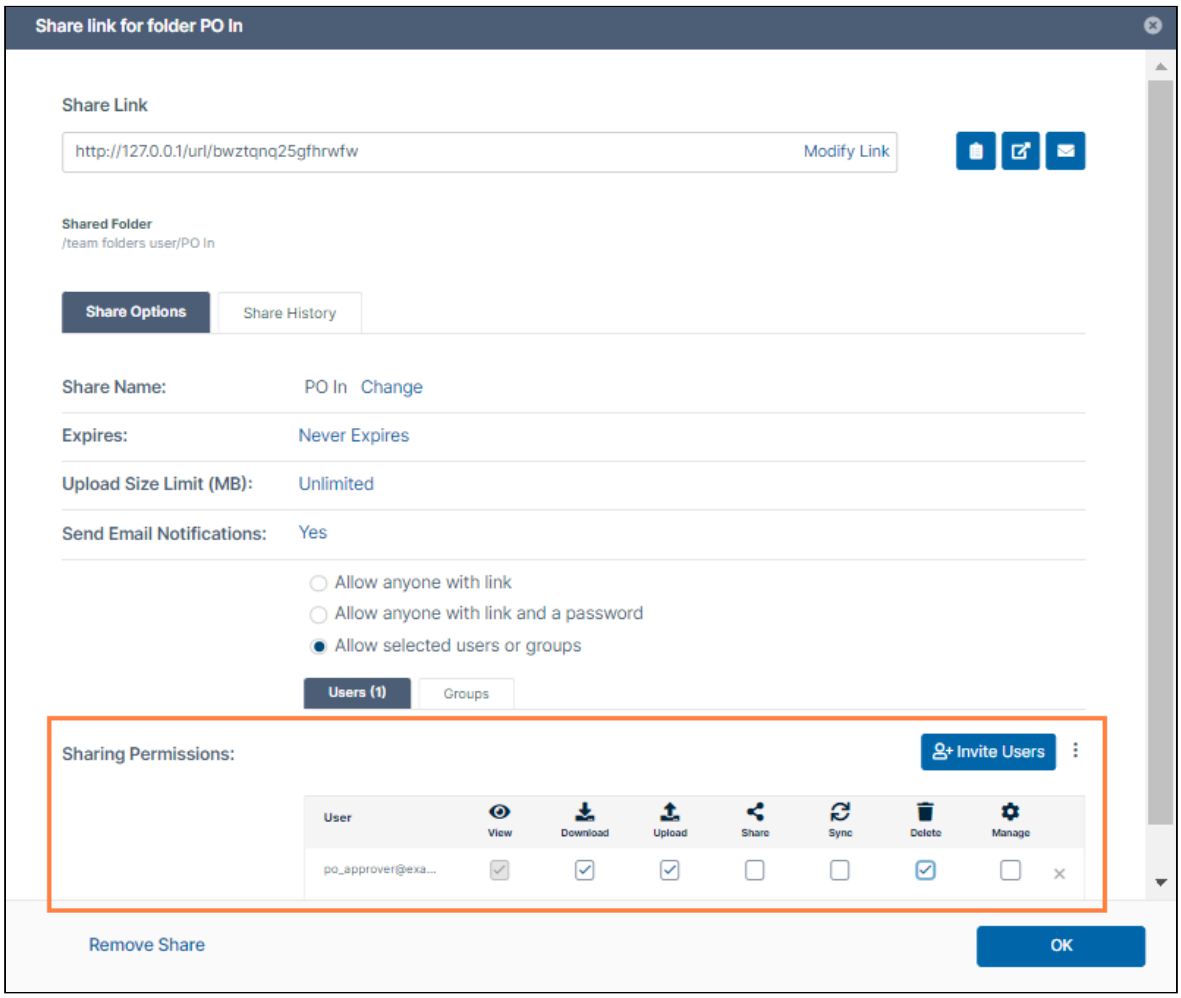
- Configure the Team Folders Account
- Share the Team Folder and Set Permissions

1. Log into the admin portal, and set up three Team Folders for purchase orders: **PO In**, **PO Approved**, and **PO Rejected**.

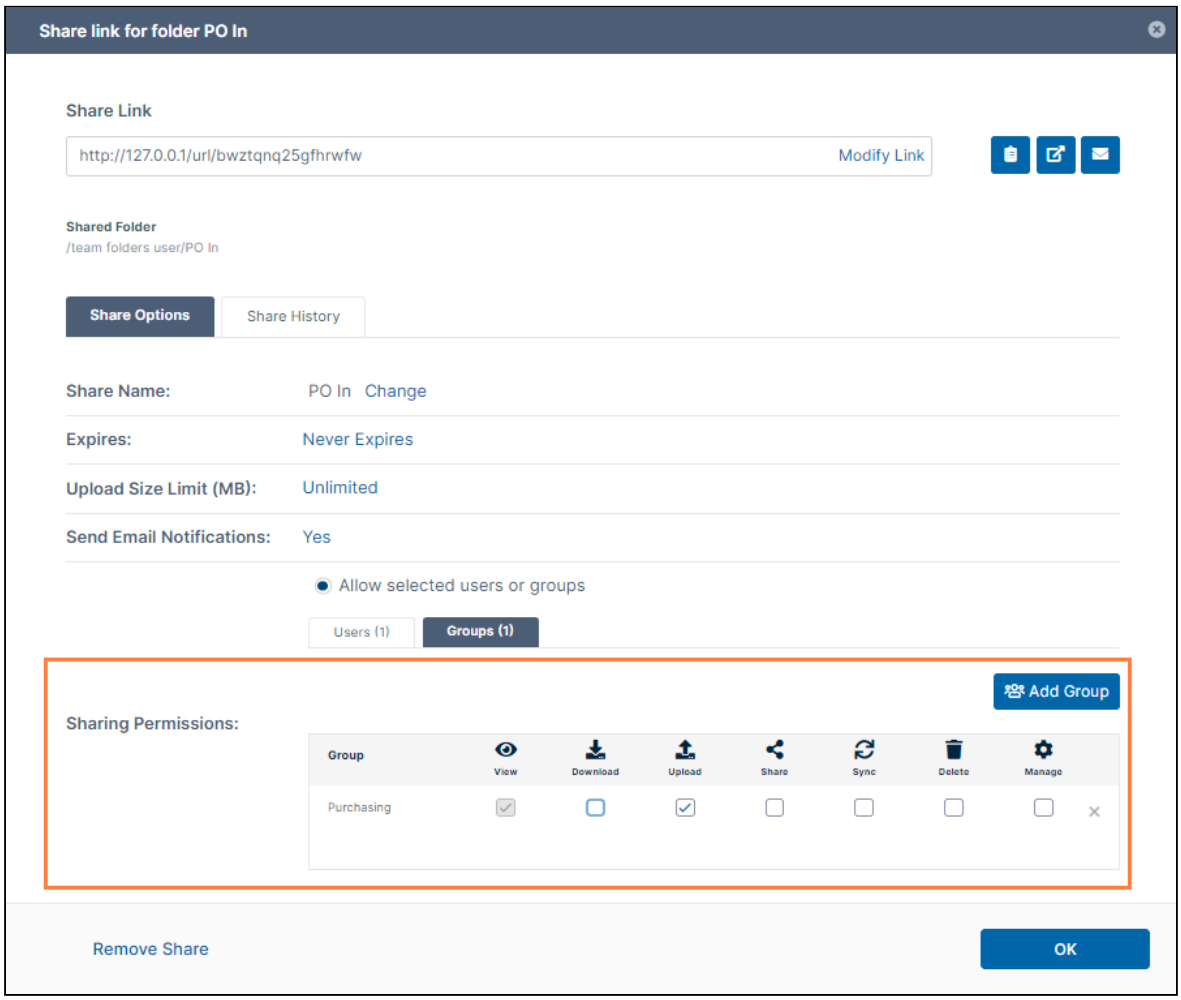


Share the folders with the following users:

- **PO In** - Share with your company's PO approver and your Purchasing team (the users who submit POs). At minimum, give the PO approver **View**, **Download, Upload** and **Delete** access.
  Upload access is only necessary because it is required for **Delete** access (which is required to move the PO from **PO In** to **PO Accepted** or **PO Rejected**).

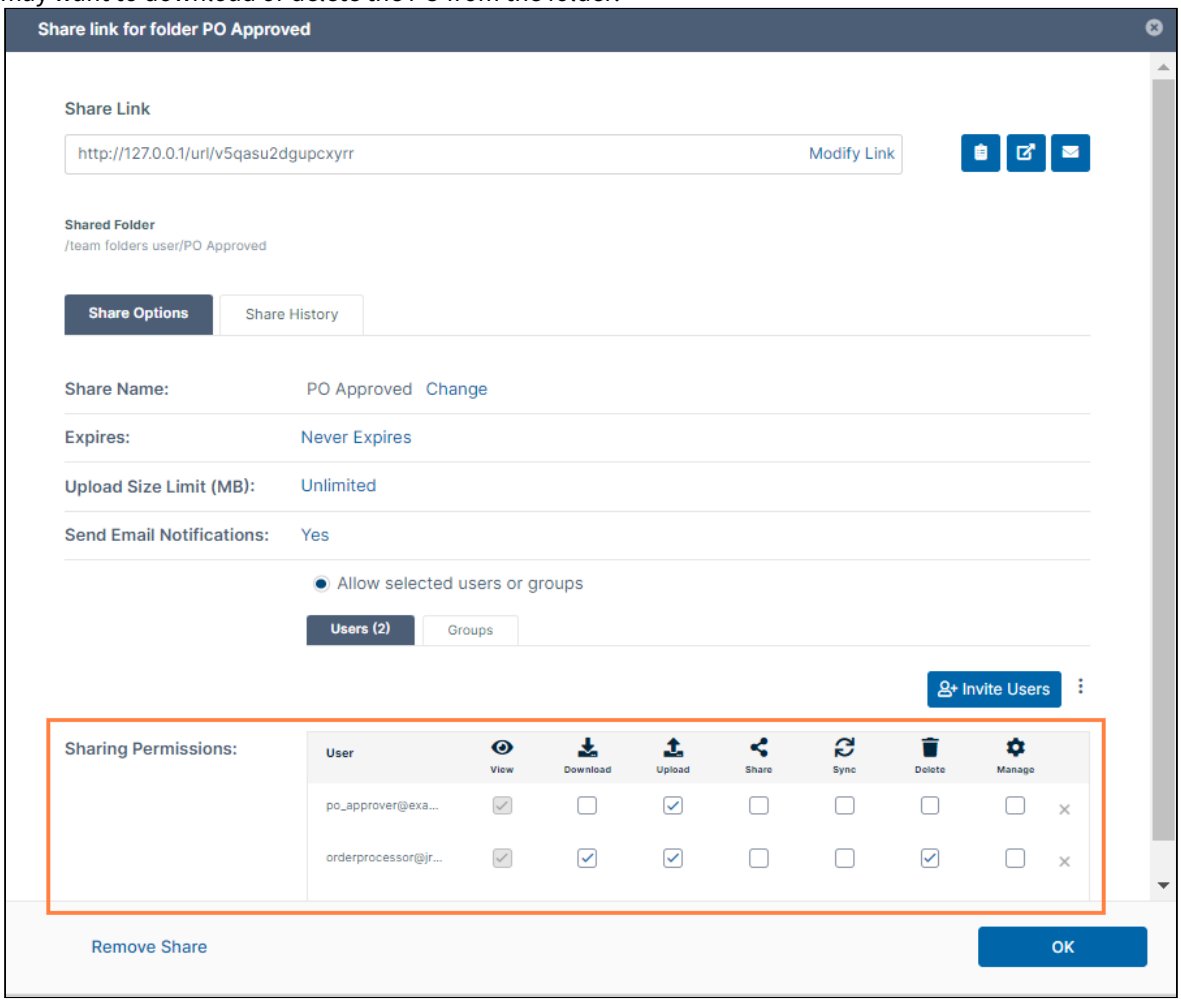


At minimum, give the members of the **Purchasing** team **View** and **Upload** access.

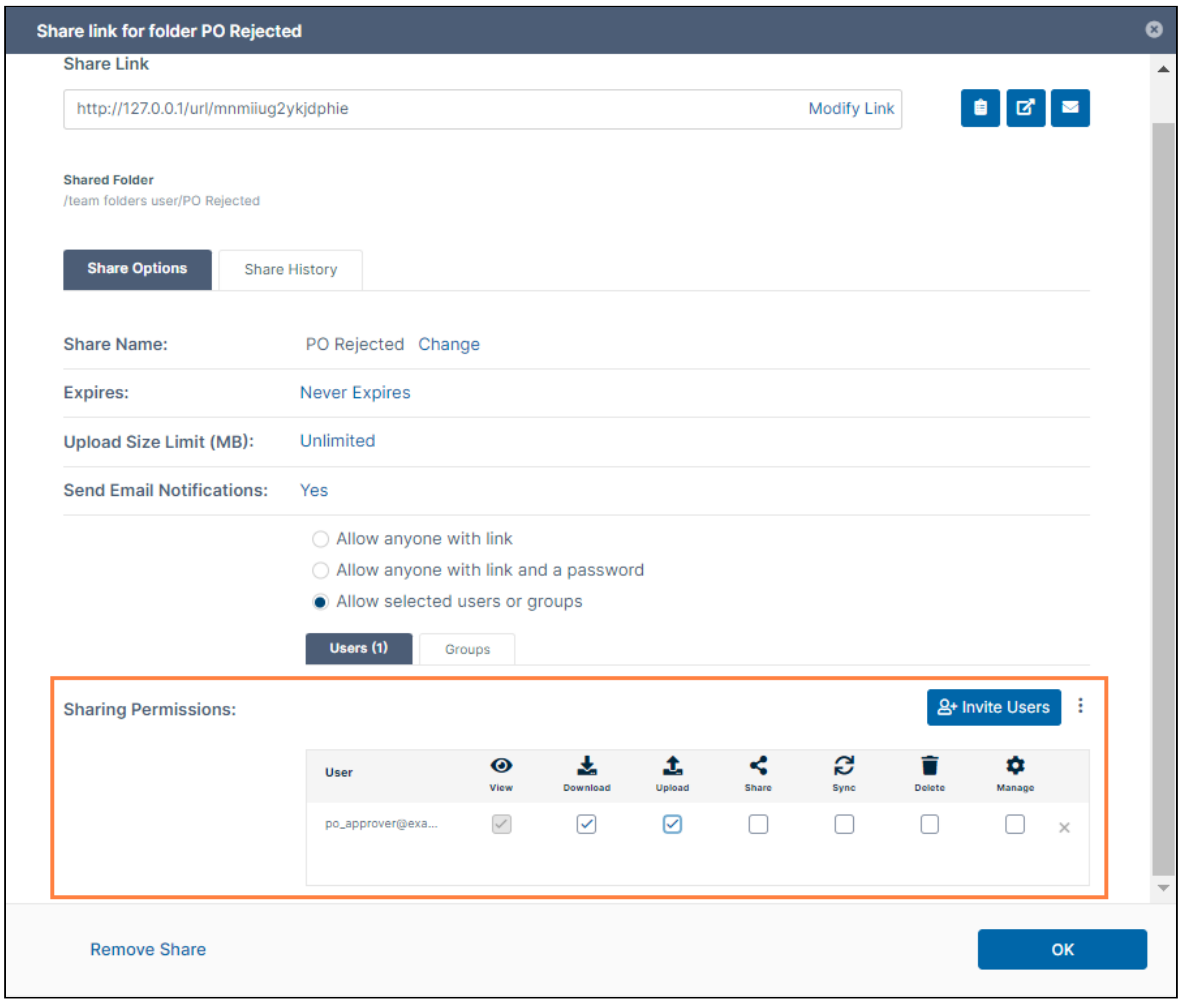


- **PO Approved** - Share with your company's PO approver and with the vendor's order processor.
  At minimum, give the PO approver **View** and **Upload** access.
  Give the order processor at the vendor **View**, **Download**, **Upload**, and **Delete** access. The order processor

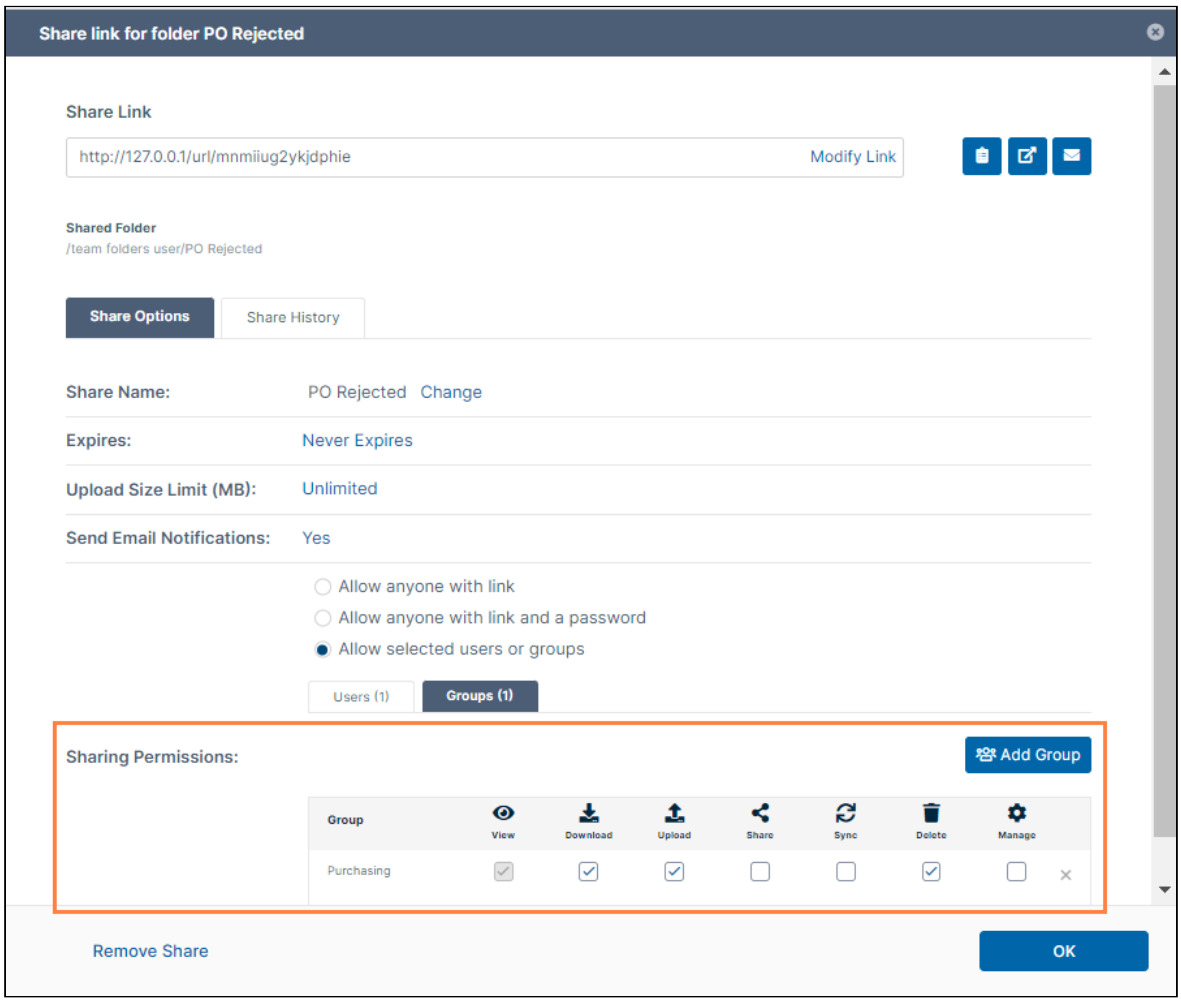
may want to download or delete the PO from the folder.



- **PO Rejected** - Share with your company's PO approver and with your Purchasing team. At minimum, give the PO approver **View**, **Download**, and **Upload** access.



At minimum, give the members of the Purchasing team **View**, **Download**, **Upload**, and **Delete** access. The Purchasing user may want to download or delete the PO from the folder.



Configure the workflow

Now, create the following workflow:

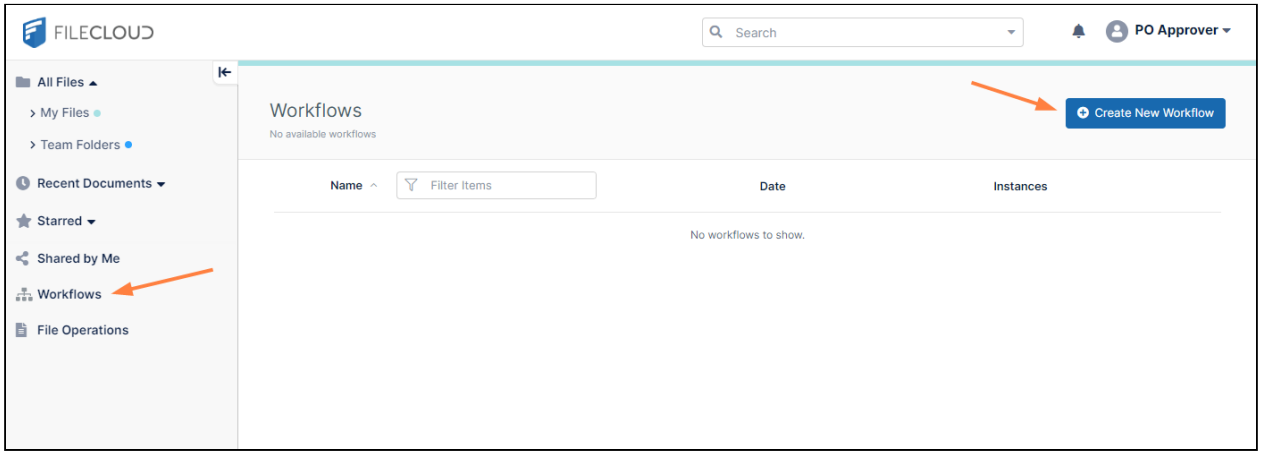
- If a file is added/uploaded to **PO In**, notify the internal approver and wait for file approval.
- If the file is approved, move it to the **PO Approved** folder, and notify the vendor's order processor.
- If the file is rejected, move it to the **PO Rejected** folder, and notify the Purchasing team.

In this example, the PO Approver creates the workflow.

The process for creating the workflow:

1. Log into the user portal and in the navigation panel, click **Workflows**.
   The **Workflows** screen opens.

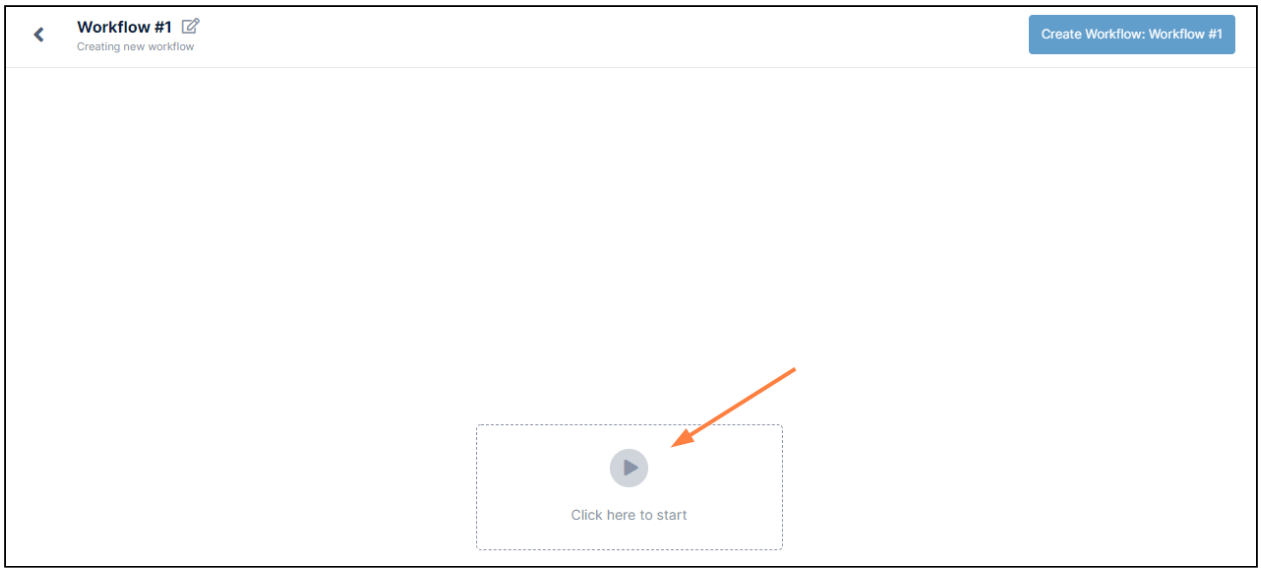
2. Click **Create New Workflow**.



.

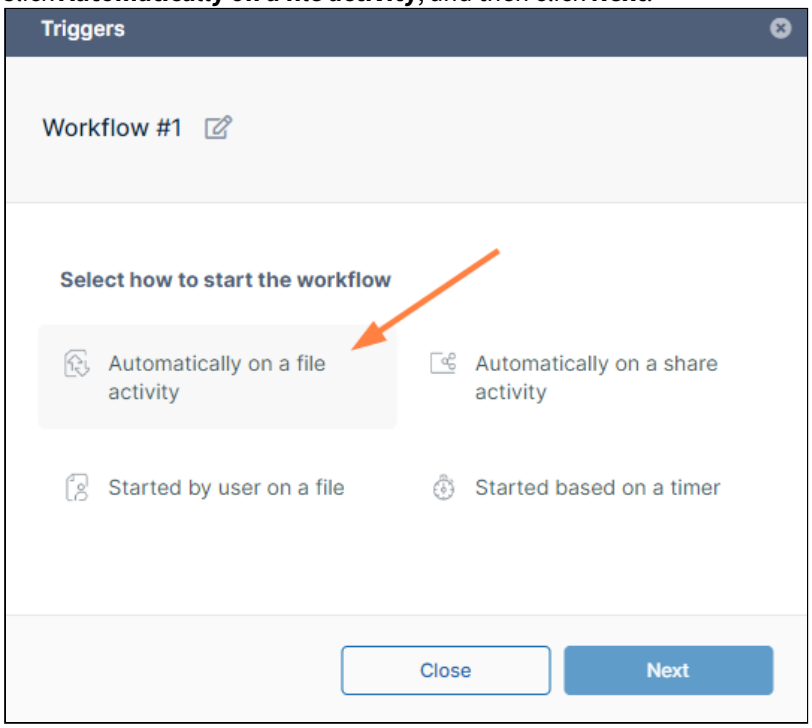
The **Create Workflow** interface opens.

3. Click **Click here to start**.



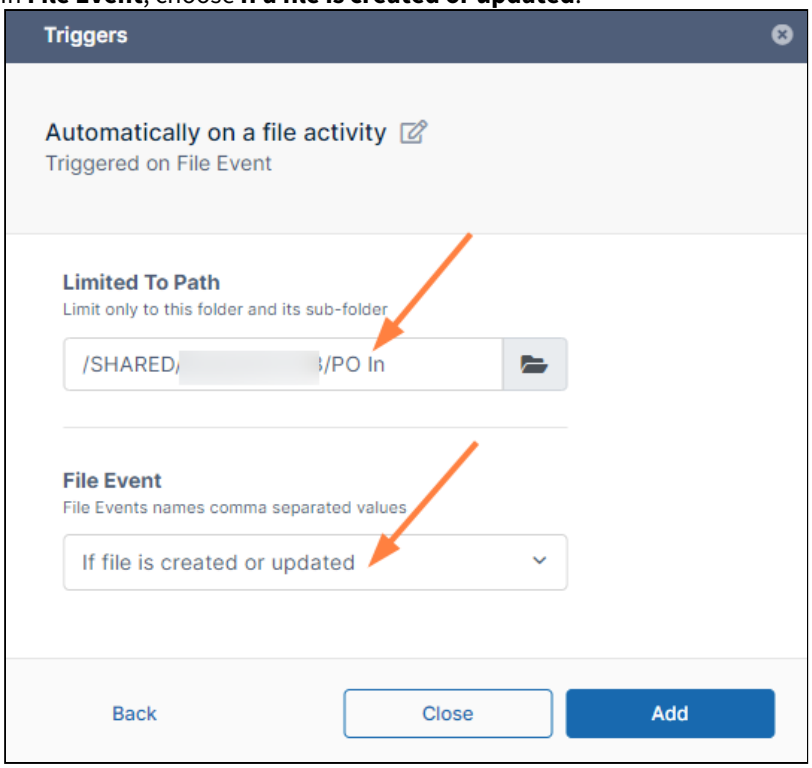
The **Triggers** dialog box opens.

4. Click **Automatically on a file activity**, and then click **Next**.

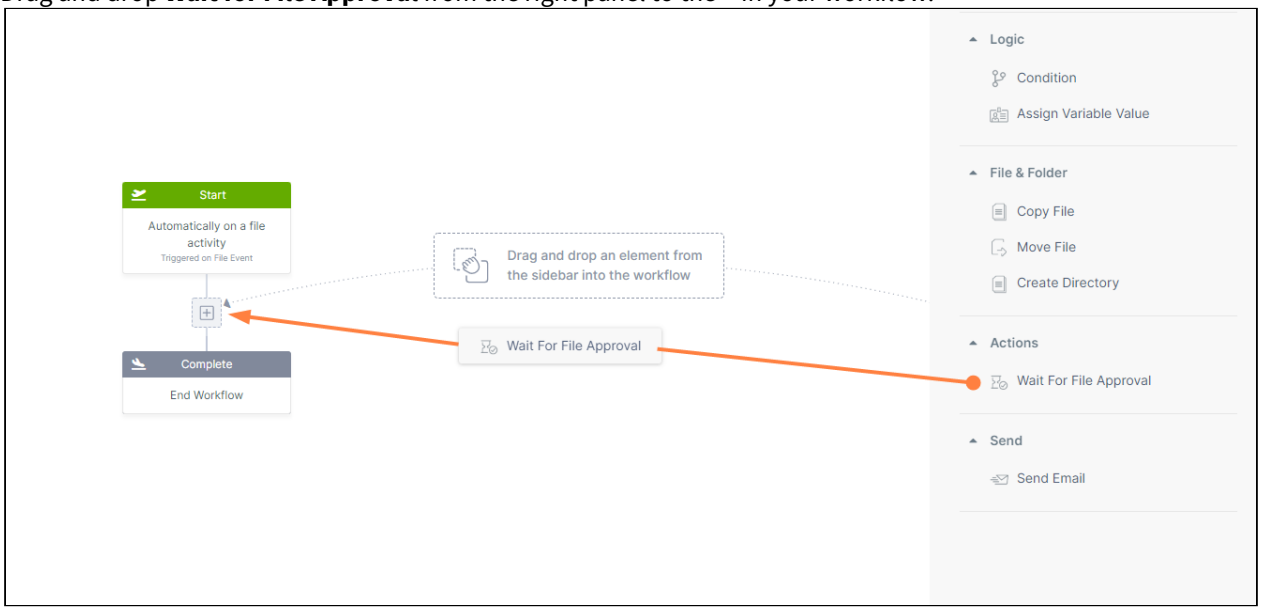


The next box allows you to choose the folder where the file activity takes place.

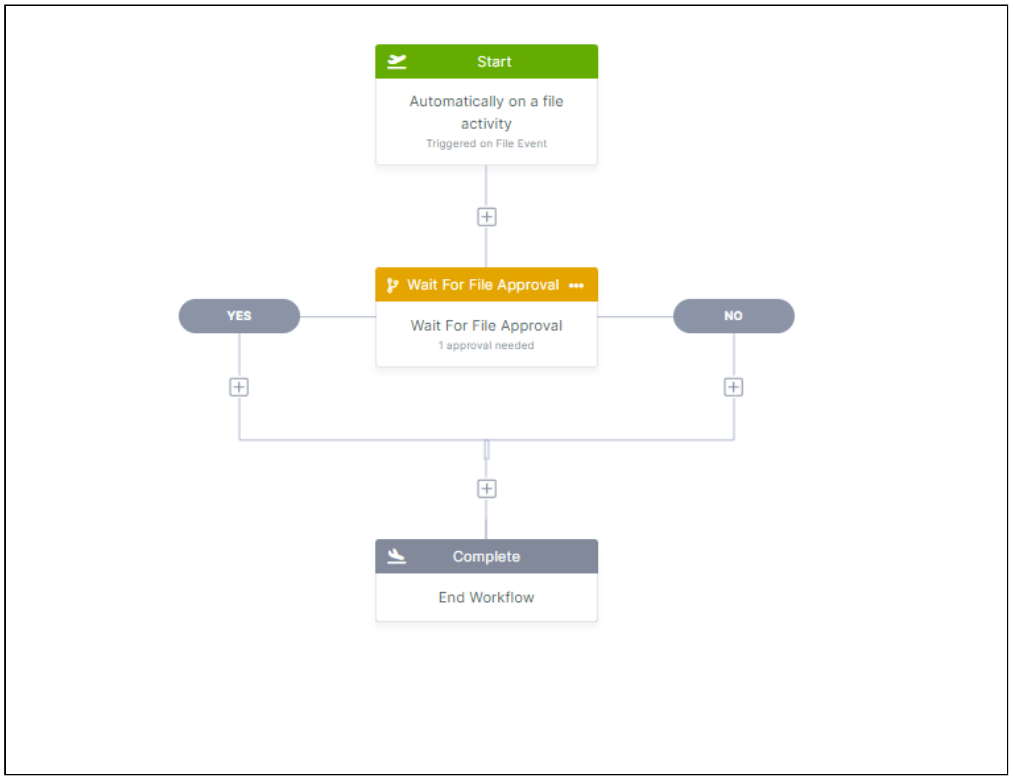
5. Navigate to Team Folders and choose the **PO In** folder.
6. In **File Event**, choose **If a file is created or updated**.



7. Click **Add**.
   The **Start** and **Complete** boxes for your workflow appear on the interface.
8. Drag and drop **Wait for File Approval** from the right panel to the **+** in your workflow.



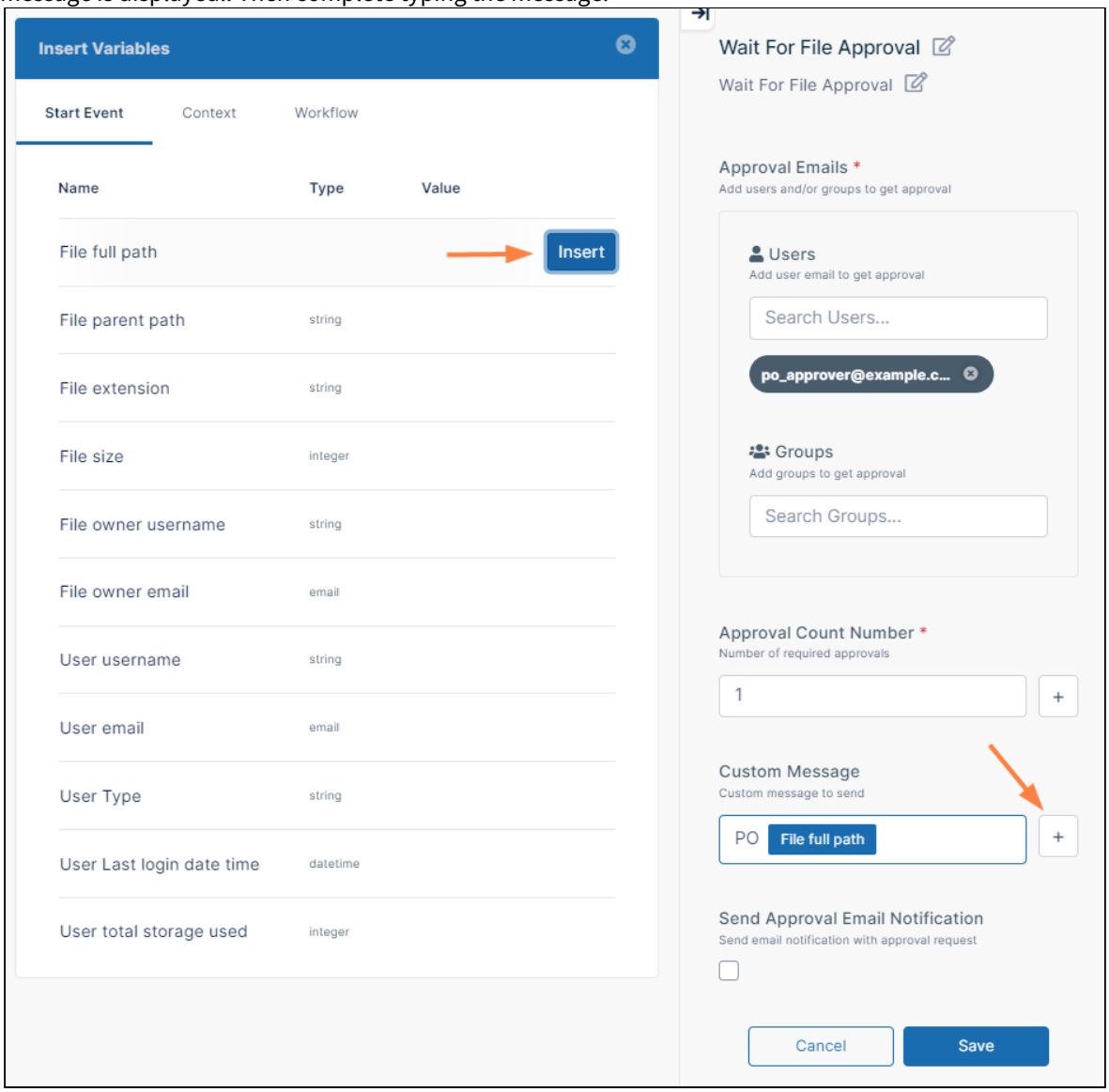
The **Wait for File Approval** workflow step continues in two directions, one if the file is approved and the other if it is not approved. It also sends a notification to the PO approver to let them know that a file is waiting for their action.



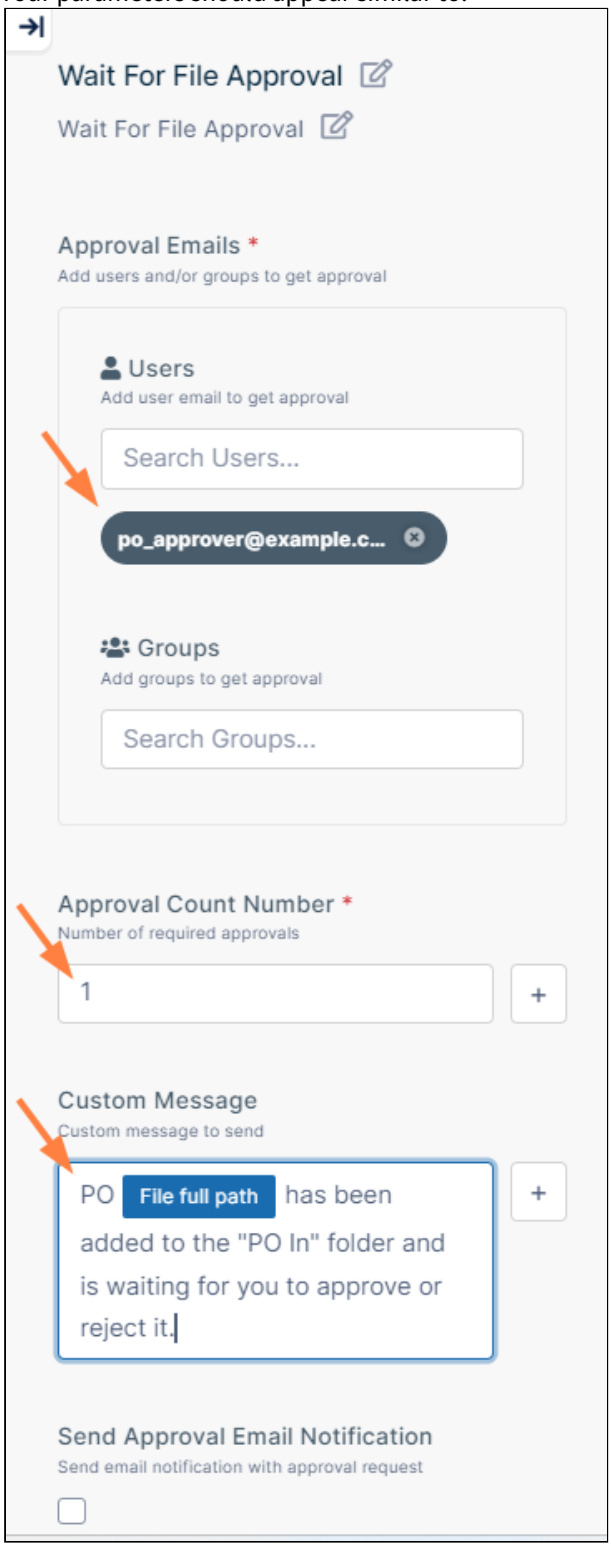
The step requires that you fill in parameters that appear in the right panel.

a. In **Approver Emails**, enter the PO Approver's email.

b. In **Custom Message**, enter a message that tells the PO Approver that a file is awaiting action. The PO Approver will receive this notification in their user portal with other notifications.
It will be helpful if users who read the message can see the name of the PO file it refers to, so we'll add a variable with the filename to the message, which will read **PO <filename> has been added to the "PO In" folder and is waiting for you to approve or reject it.**
Begin typing your message, and when you reach the point at which you want to insert the variable, click **+** next to **Custom Message** to open the **Insert Variables** box. Hover over **File full path** and click **Insert**. The variable is inserted into **Custom Message** and will appear as the file path and name when the message is displayed.. Then complete typing the message.

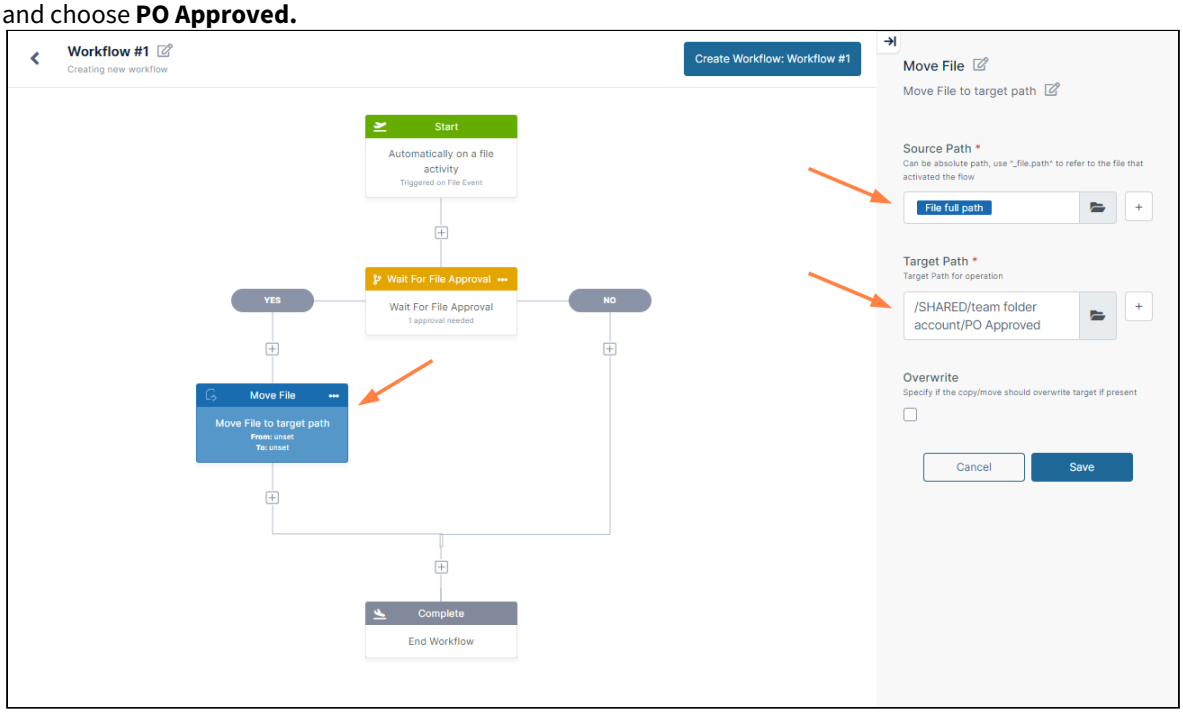


c. In this example, we only require one approval, so we leave **Approval Count Number** at 1. Your parameters should appear similar to:



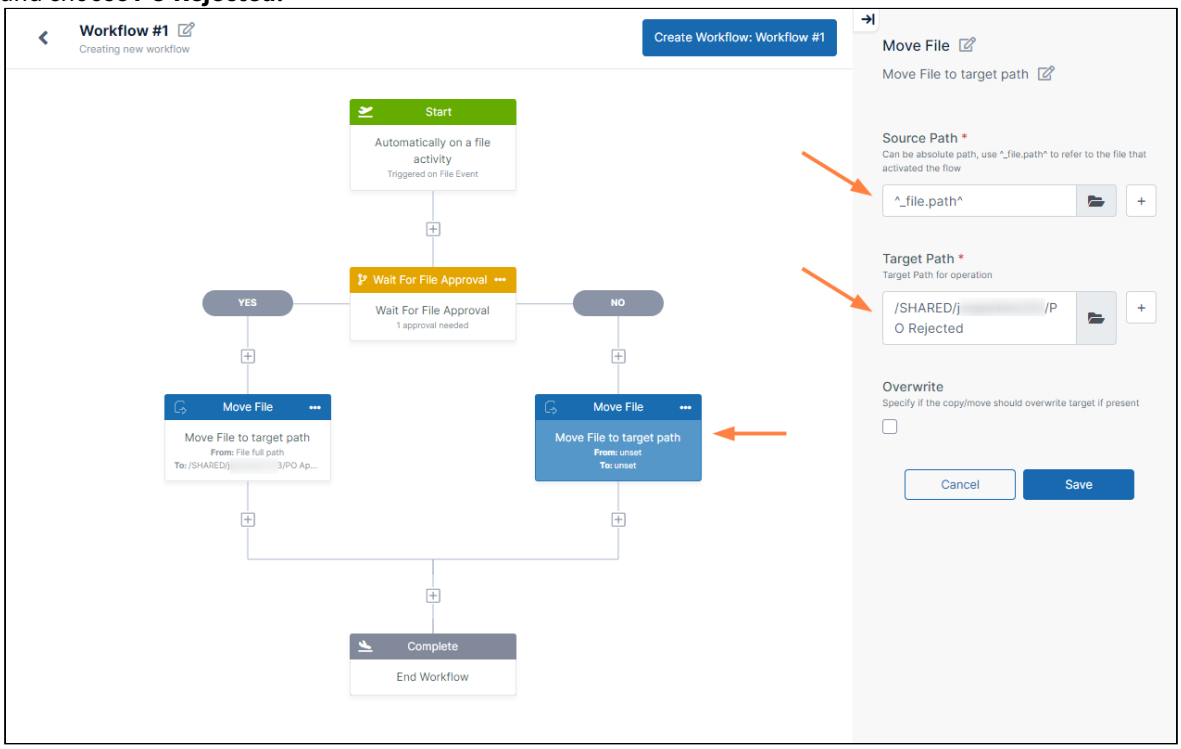
d. Click **Save**.

9. Since the next step is to move the approved file to the **PO Approved** folder, drag **Move File** from the right panel to the **+** below **Yes.**
10. You are required to add the source and target paths for the move operation.
    a. The **Source Path** is the file's current path. To indicate this, click the **+** next to the **Source Path** field, and in the **Insert Variables** box under **Start Event**, click **Insert** next to **File full path**.
    b. **Target Path** is the **PO Approved** Team Folder. Click the folder icon and navigate back to Team Folders, and choose **PO Approved.**



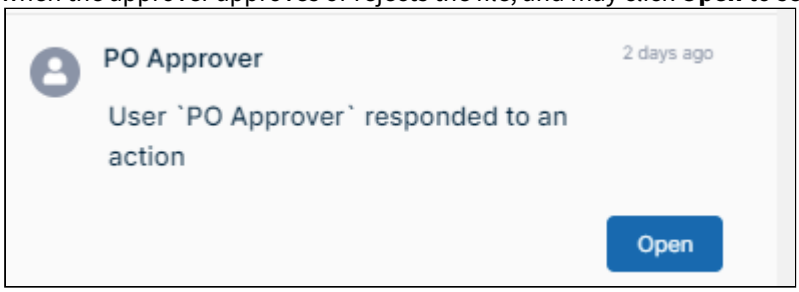
    c. Click **Save**.
11. Now, drag **Move File** from the right panel to the **+** below **No**.
12. Add the **Source Path** and **Target Path**.
    a. Since **Source Path** is the file's current path, click **+** next to the **Source Path** field, and in the **Insert Variables** box under **Start Event**, click **Insert** next to **File full path**.

b. **Target Path** is the **PO Rejected** Team Folder. Click the folder icon and navigate back to Team Folders, and choose **PO Rejected.**



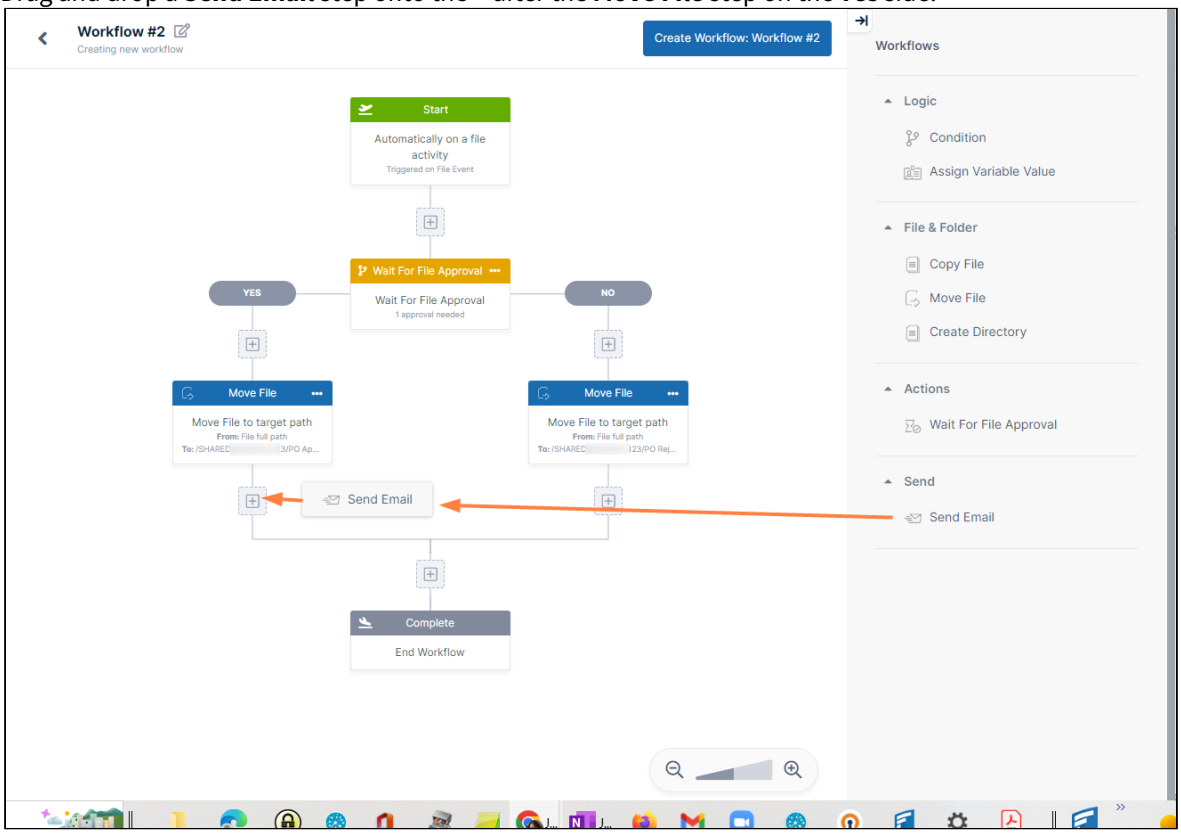
c. Click **Save**.

13. Then add a notification workflow step after the **Move File** on the **Yes** side to inform the order processor at the vendor that a PO is awaiting processing.
Also, add a notification for the user who submitted the PO. The user will see the following pop-up notification when the approver approves or rejects the file, and may click **Open** to see the details:



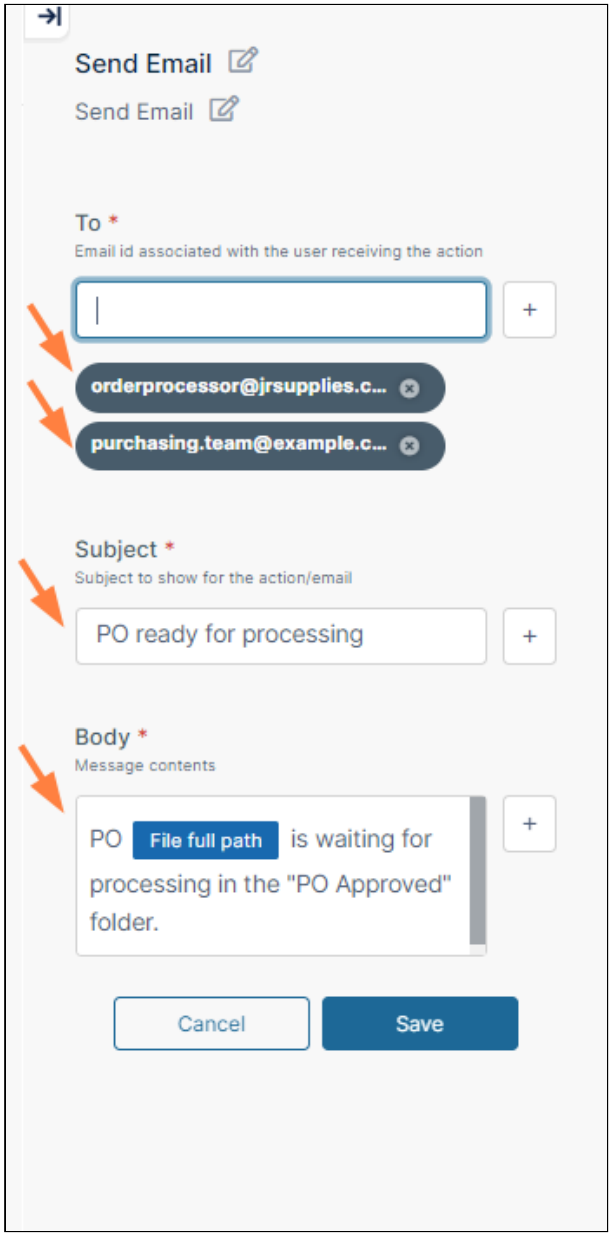
However, they will not receive email notifications unless we add them to the workflow as well.

a. Drag and drop a **Send Email** step onto the **+** after the **Move File** step on the **Yes** side.

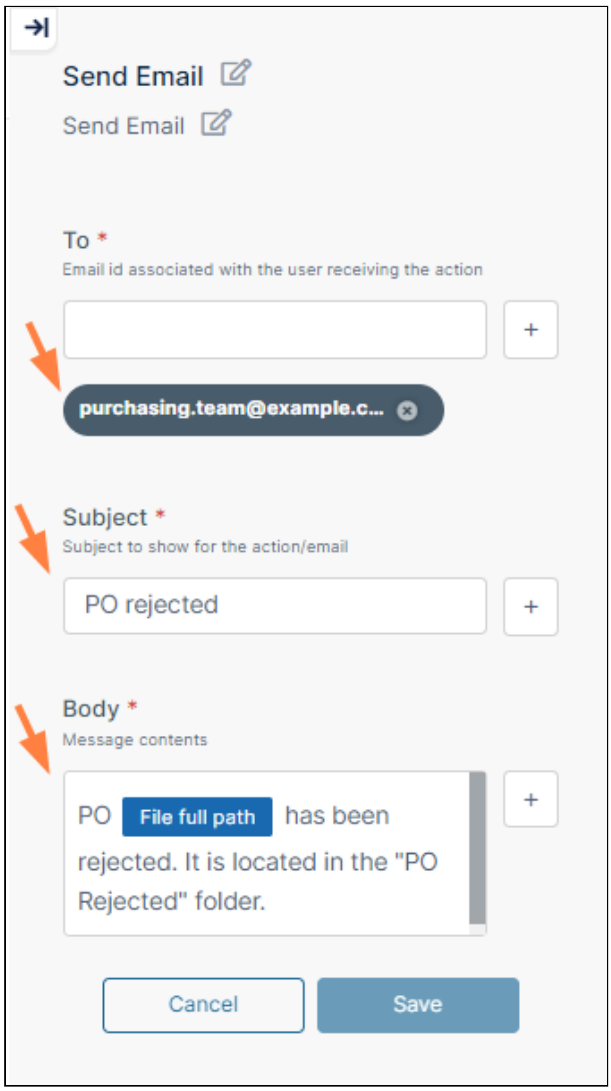


b. In the parameters that open in the right panel, enter:
   - In **To**, the order processor's email and the Purchasing team's group email (add the group email for the Purchasing team since you cannot indicate the email of the specific user who submitted the PO).
   - In **Subject**. add a subject such as **PO ready for processing**

- In **Body** add a message such as **PO <filename> is waiting for processing in the PO Approved Folder**.

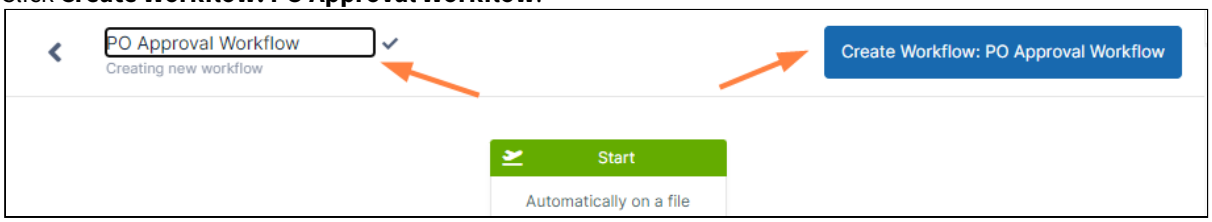


c. Click **Save**.
d. Next, drag and drop a **Send Email** step onto the **+** after the **Move File** step on the **No** side.
e. In the parameters that open in the right panel, enter:
    - In **To**: Since the user who submitted the PO could be anyone in the Purchasing department, enter the group email address for the Purchasing team. If there were only one user who added PO's, you could add that user's email.
    - In **Subject**: A subject such as **PO rejected**.
    - In **Body**: A message such as **PO <filename> has been rejected. It is located in the PO Rejected folder**.



f. Click **Save**.

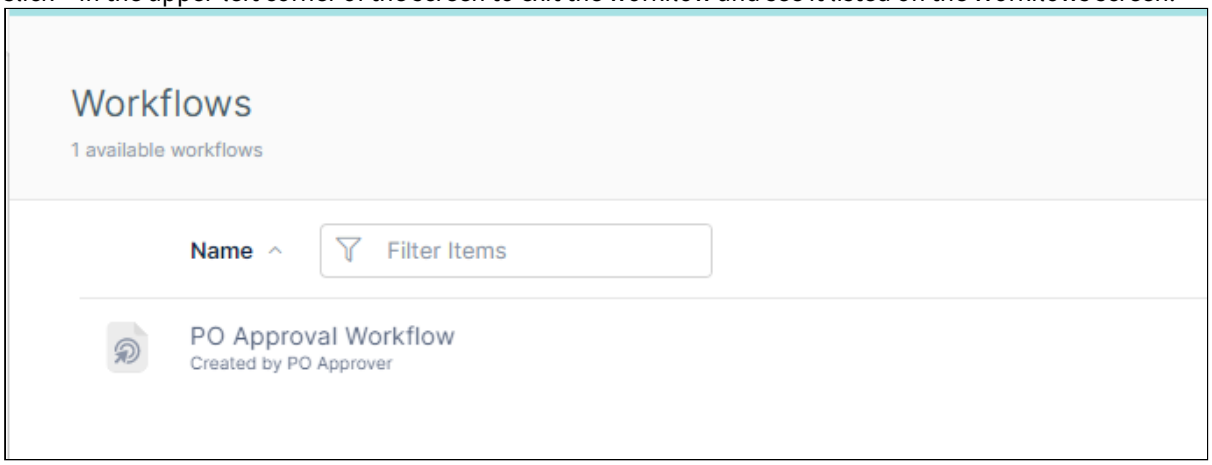
14. Click the edit icon next to **Workflow #n** in the upper left corner of the screen, and give the workflow a meaningful name, such as **PO Approval Workflow**.
15. Click **Create Workflow: PO Approval Workflow**.



The workflow is now complete:

16. Click **Save Workflow**.

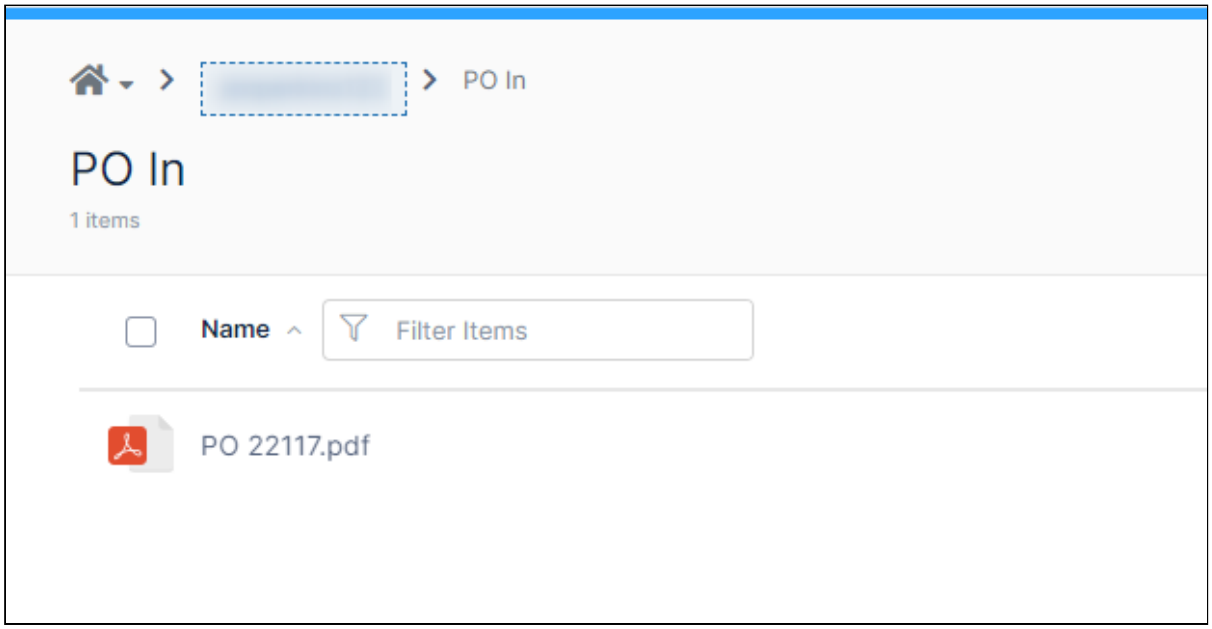
17. Click **<** in the upper-left corner of the screen to exit the workflow and see it listed on the Workflows screen:



Test the Workflow

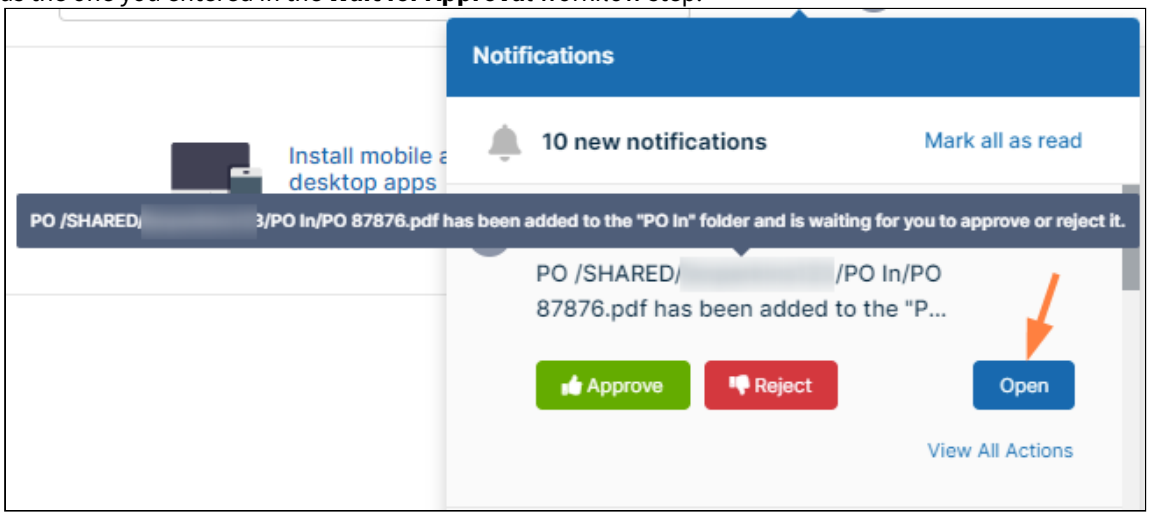
Before using the workflow, it is important that you test it.

1. Log in to the user portal as one of the users in your Purchasing group.
2. Create a PO and move it into the **PO In** Team Folder.

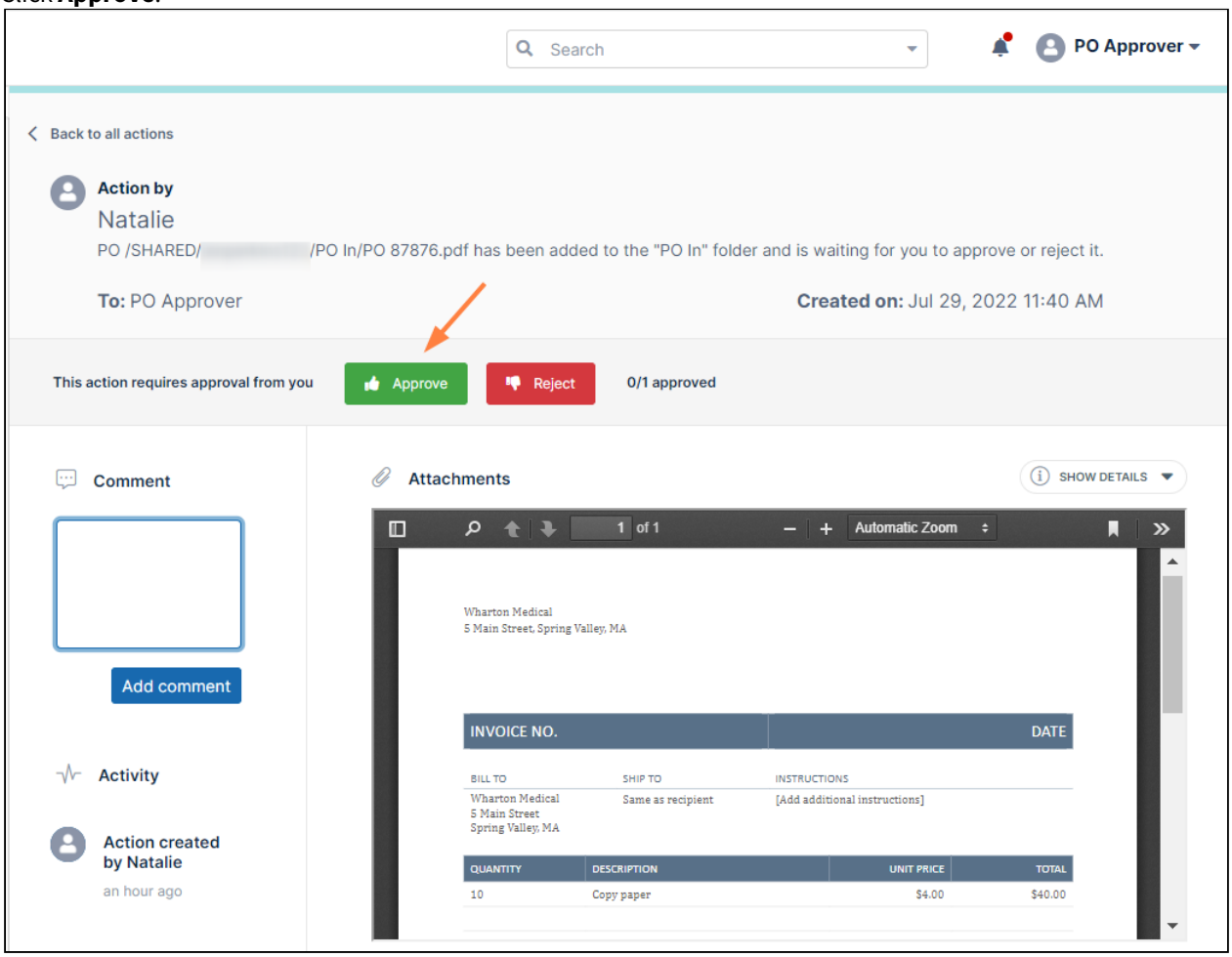


3. Now, log in to the user portal as the **PO Approver**.
   Check if you have received a notification about the file awaiting your approval. The message should be the same

as the one you entered in the **Wait for Approval** workflow step.

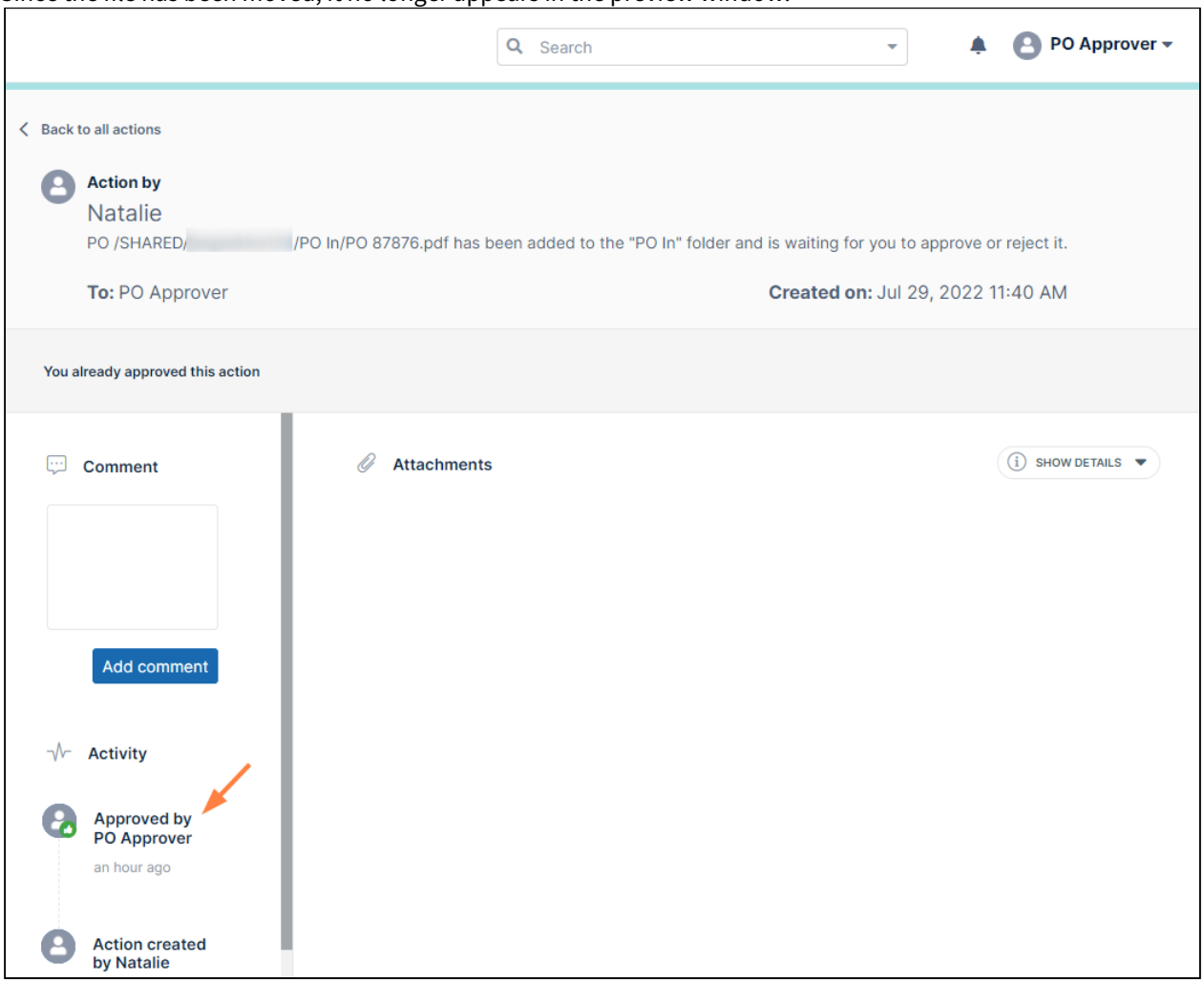


4. You can approve or reject the PO from the notification, but in a real-life scenario you would want to review it first, so click **Open**.
5. Click **Approve**.

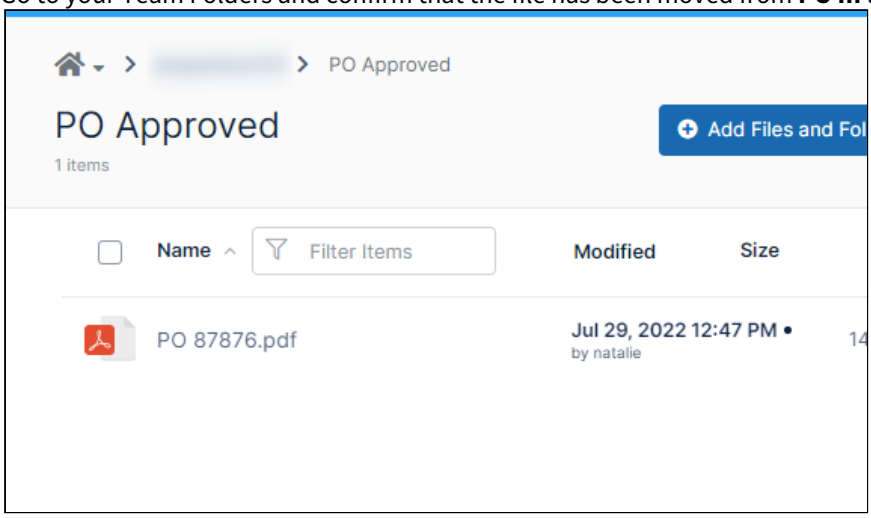


A pop-up should notify you that the file has been approved, and you should see an action under **Activity**

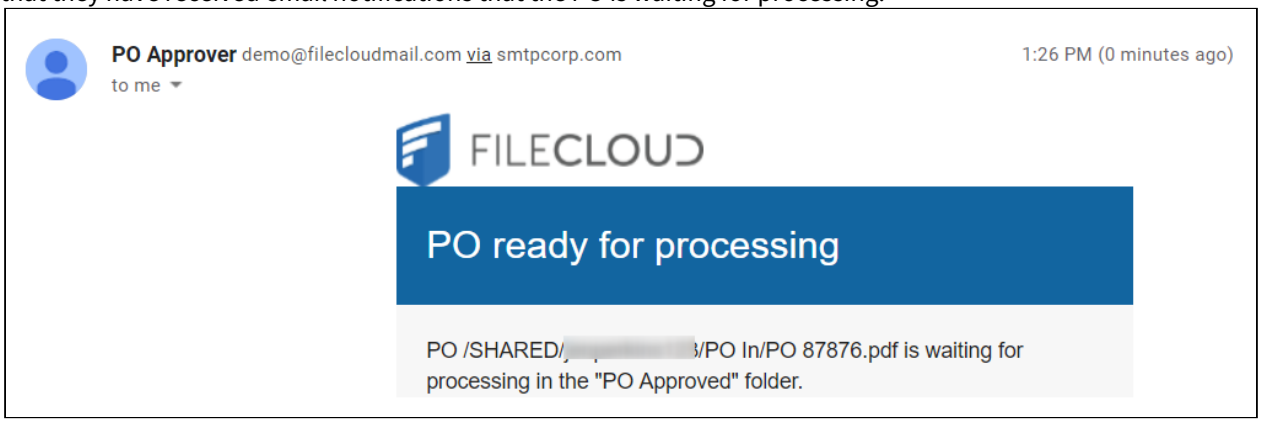
indicating that you have approved the file.
Since the file has been moved, it no longer appears in the preview window.



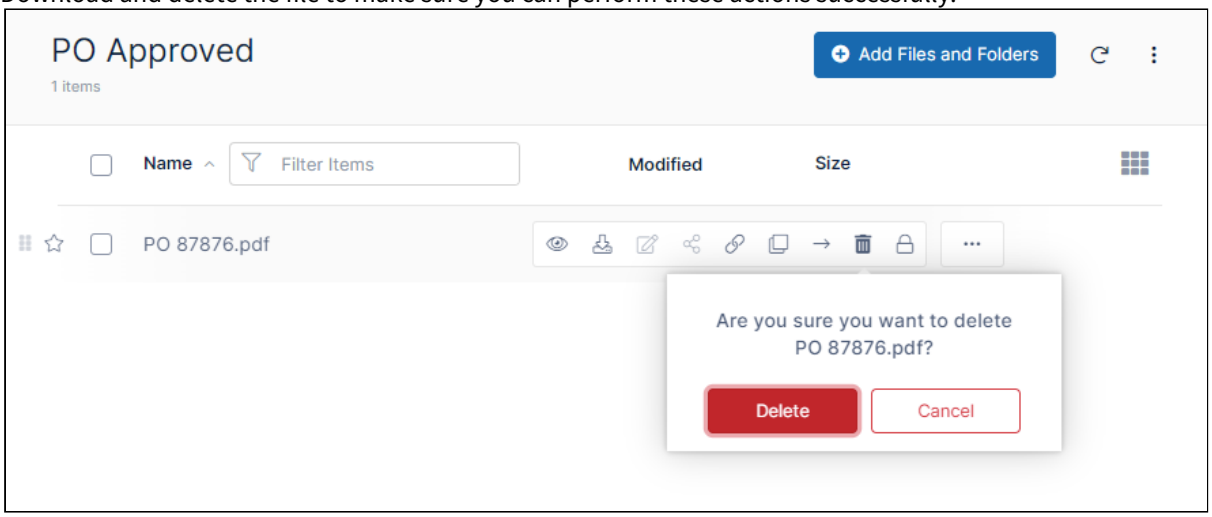
6. Go to your Team Folders and confirm that the file has been moved from **PO In** to **PO Approved**.



7. Then check the emails of the order processor at the vendor and the user who submitted the order, and confirm that they have received email notifications that the PO is waiting for processing:

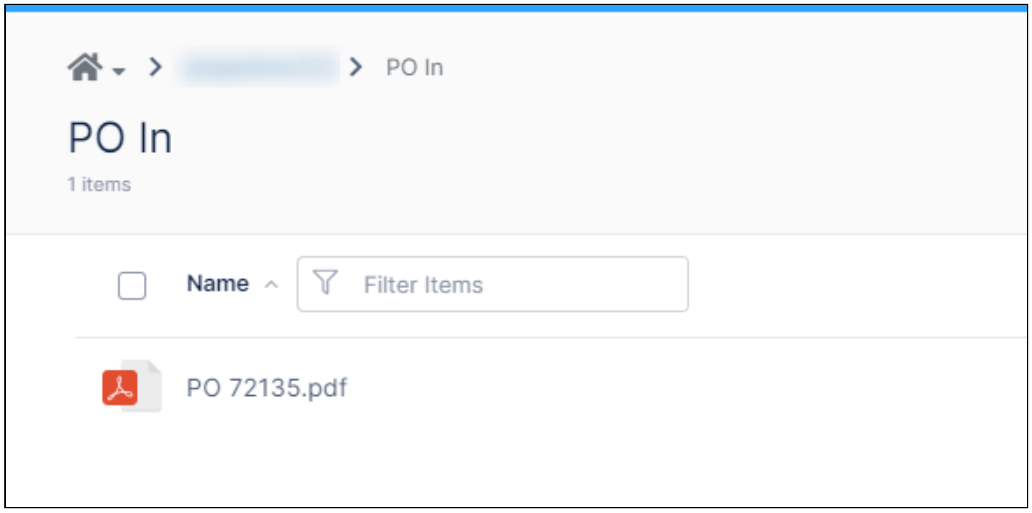


8. Log in to the user portal as the order processor and confirm that you can see the file in the PO Approved folder. Download and delete the file to make sure you can perform these actions successfully.

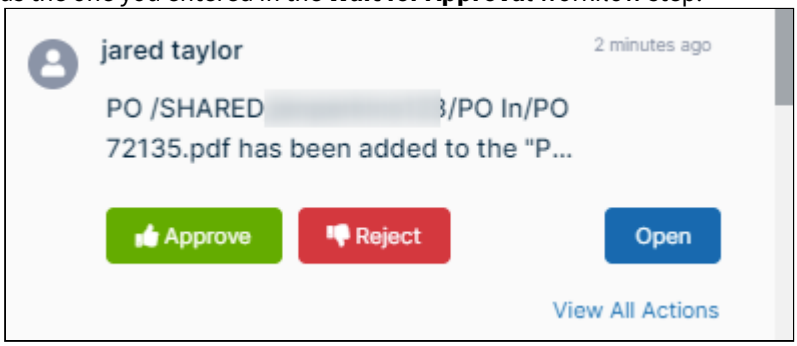


Now, repeat the check for a rejected PO.

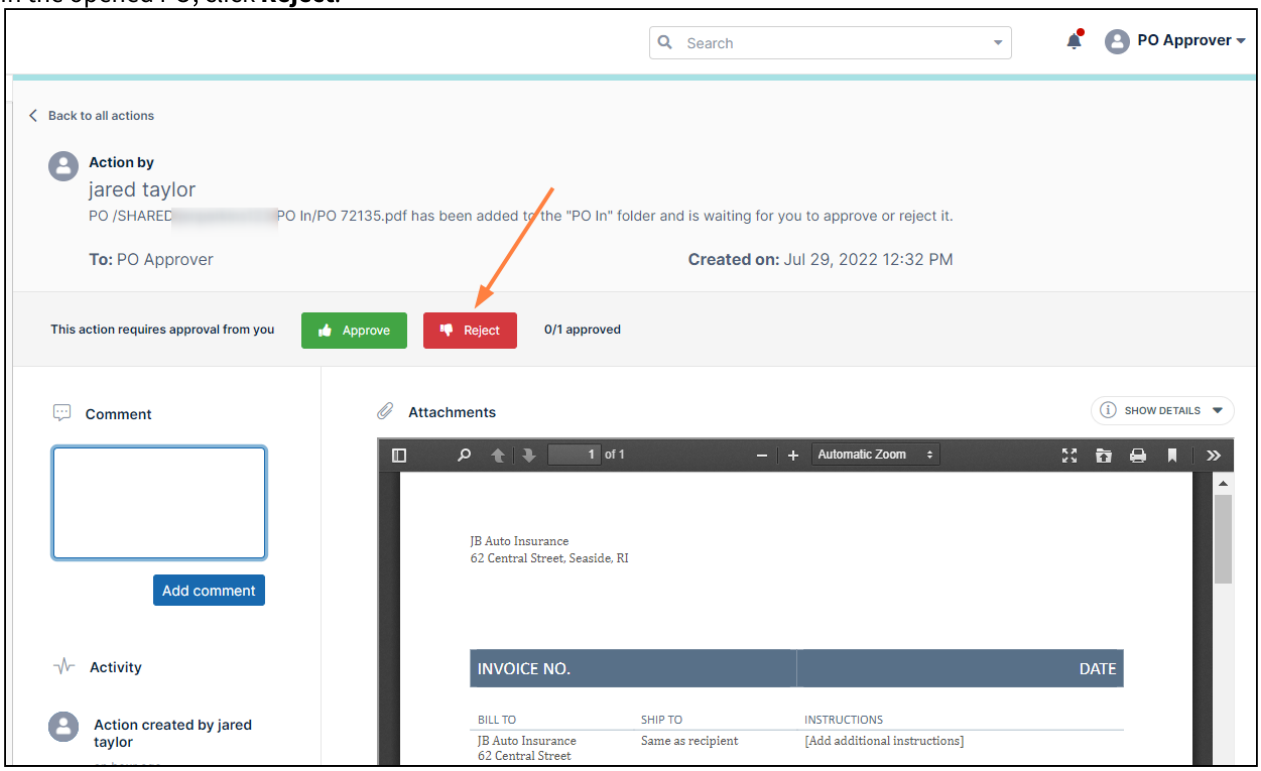
9. Log in to the user portal as one of the users in your Purchasing group.
10. Create a PO and move it into the **PO In** Team Folder.



11. log in to the user portal as the **PO Approver**.
    You should have received a notification about the file awaiting your approval. The message should be the same as the one you entered in the **Wait for Approval** workflow step.

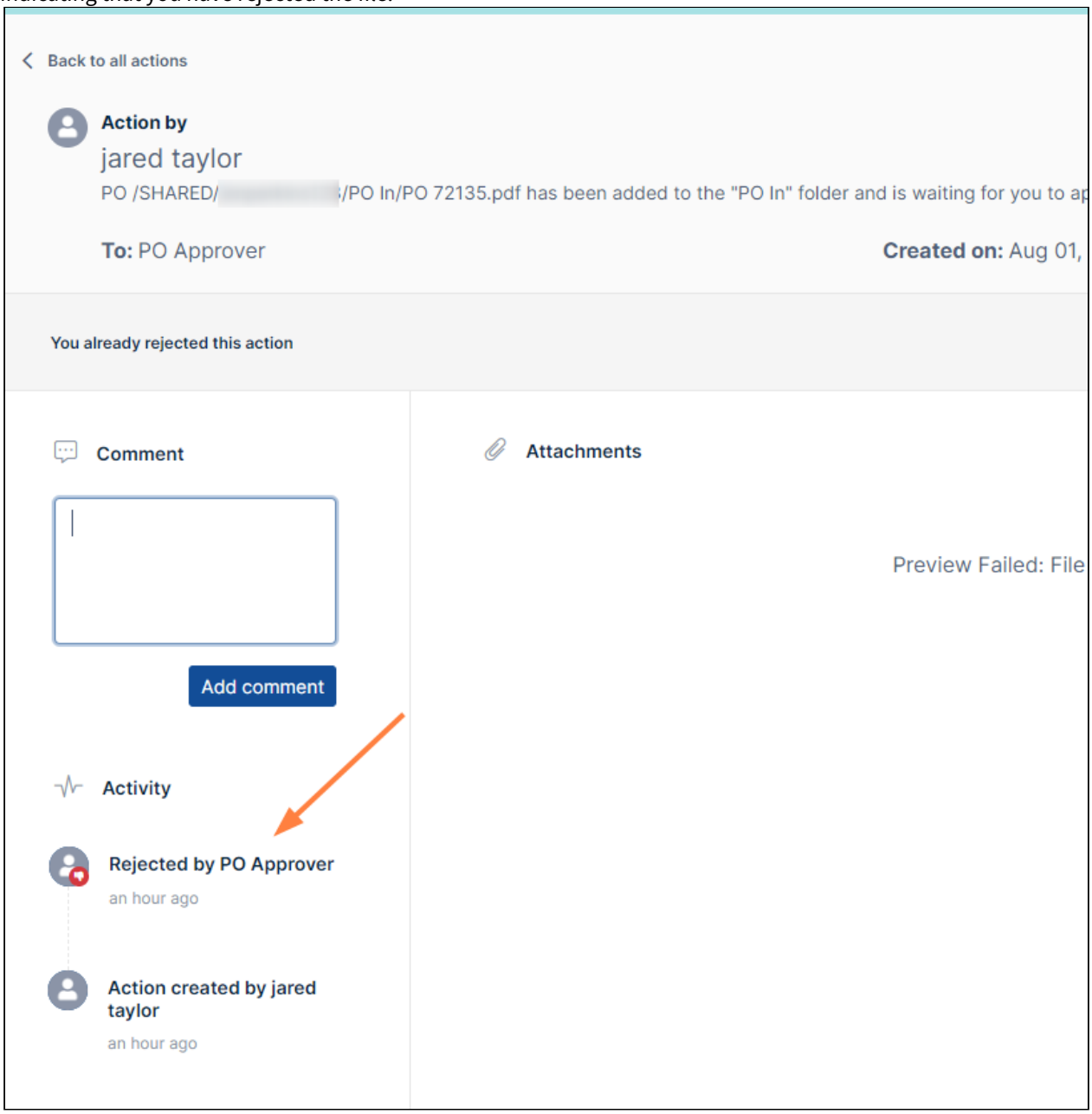


12. Click **Open**.
13. In the opened PO, click **Reject**.

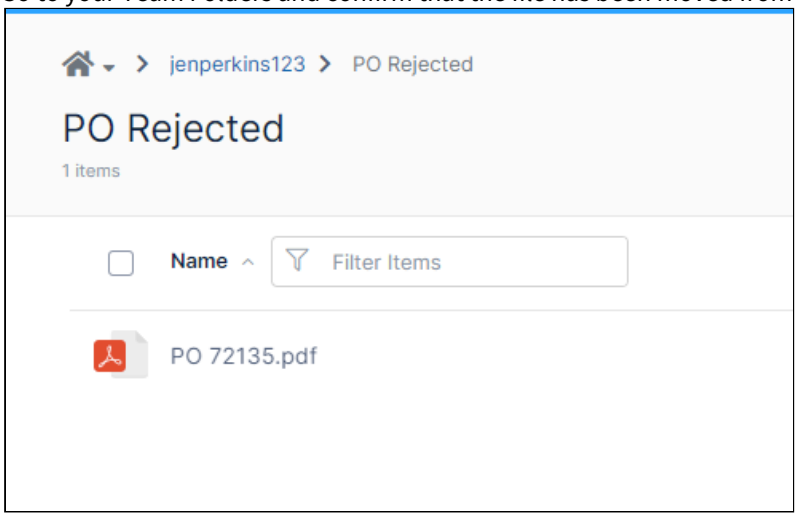


A pop-up should notify you that the file has been rejected, and you should see an action under **Activity**

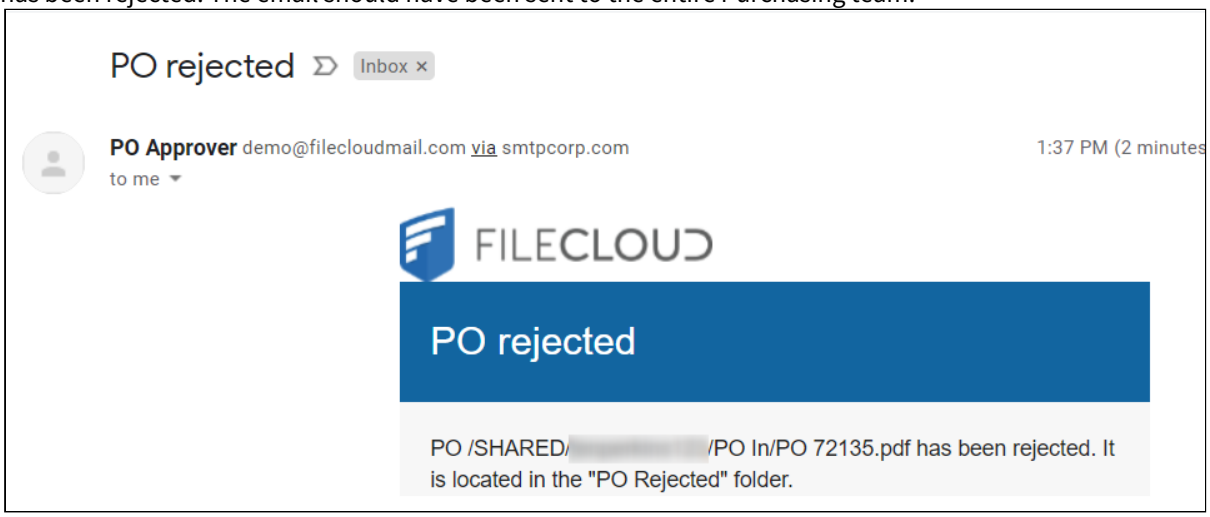
indicating that you have rejected the file:



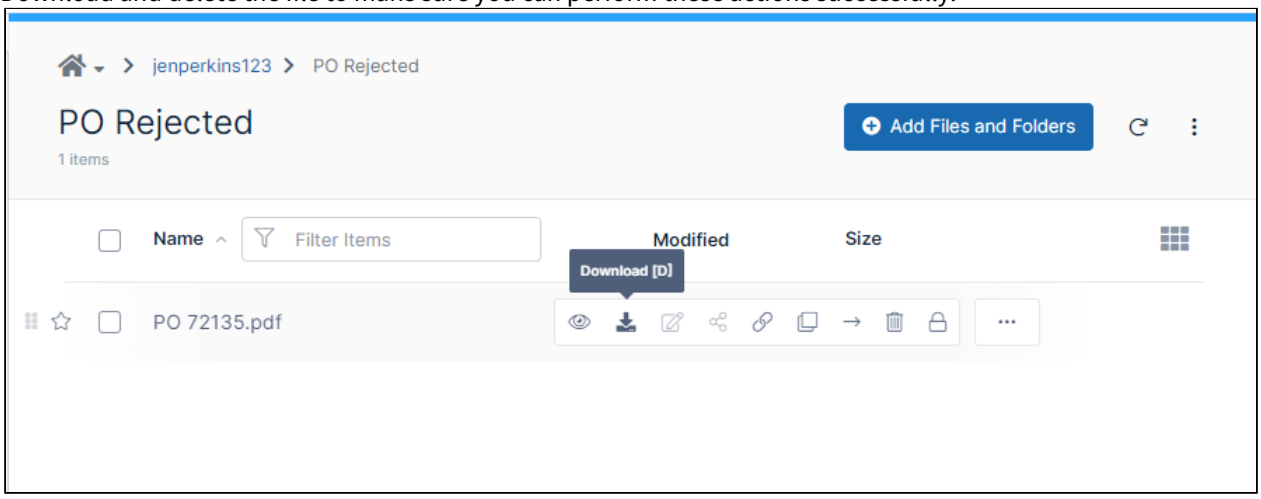
14. Go to your Team Folders and confirm that the file has been moved from **PO In** to **PO Rejected**.



15. Check the email of the PO creator, and make sure that the creator has received an email notification that a PO has been rejected. The email should have been sent to the entire Purchasing team.



16. Log in to the user portal as the PO creator and confirm that you can see the file in the **PO Rejected** folder. Download and delete the file to make sure you can perform these actions successfully.

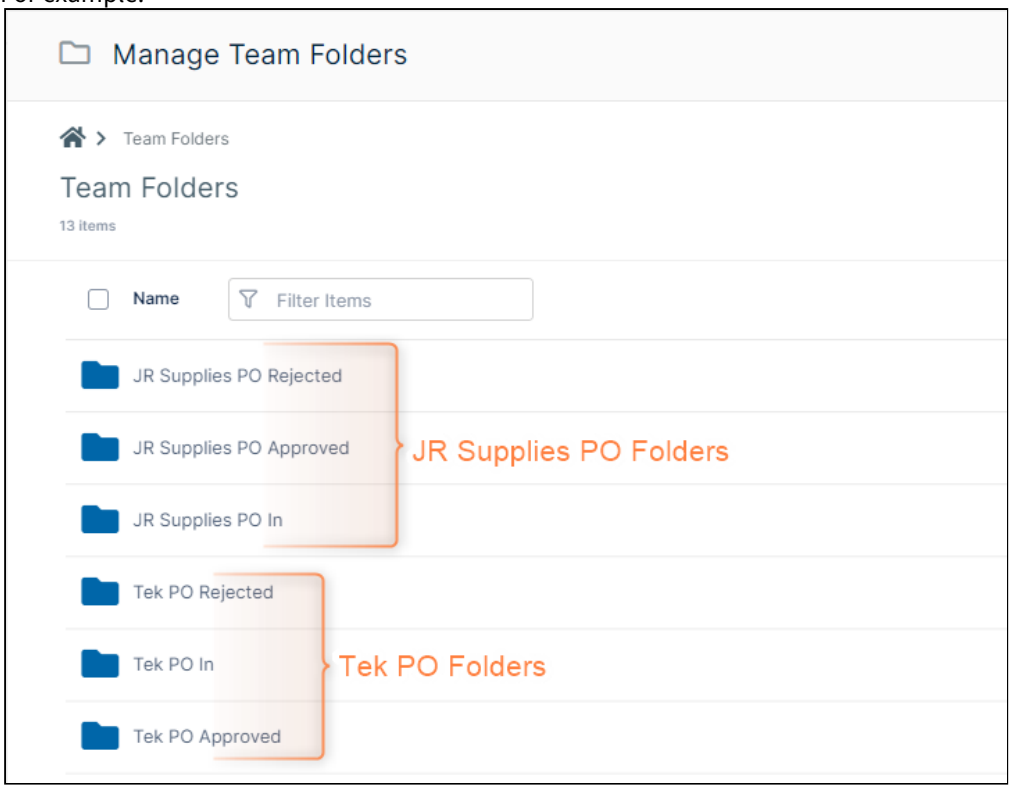


Your workflow has passed testing! You can now begin using it.

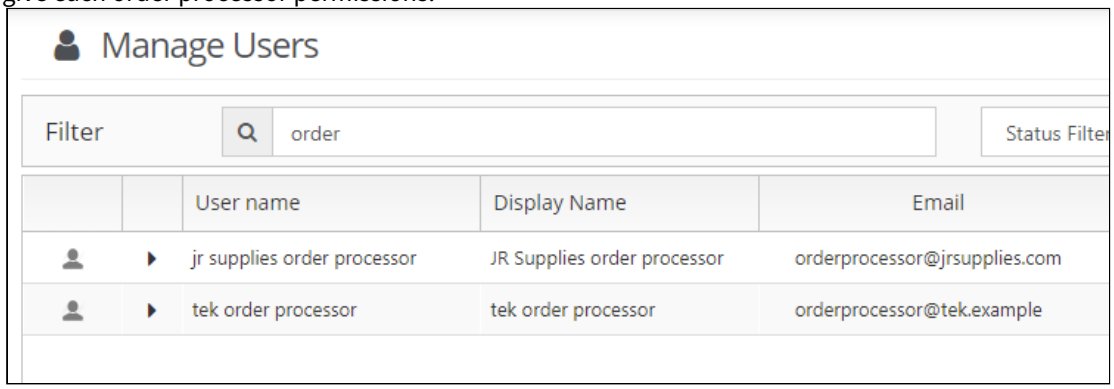
Expanding the example to work for multiple vendors

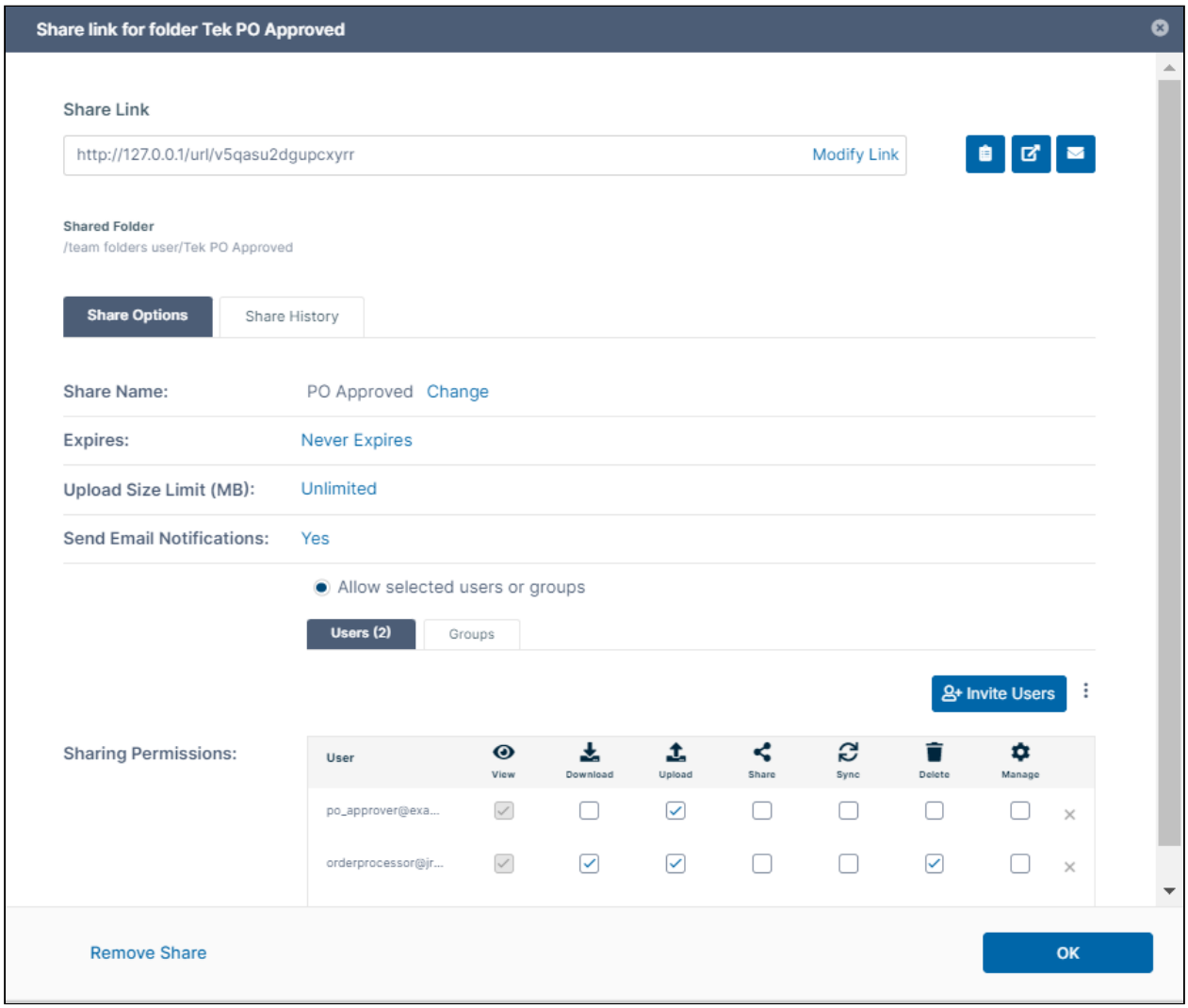
If you want to use this example to automate processing for several of your vendors take the following steps:

1. Create separate **PO In**, **PO Approved** and **PO Rejected** folders for each vendor. For example:

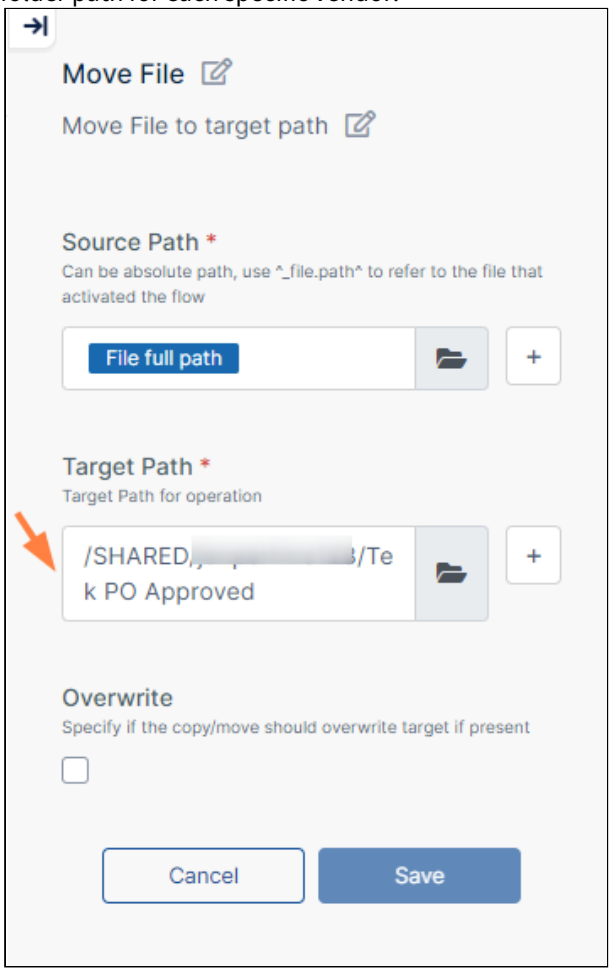


2. Create a different vendor order processor user for each vendor, and in its corresponding **PO Approved** folder, give each order processor permissions.

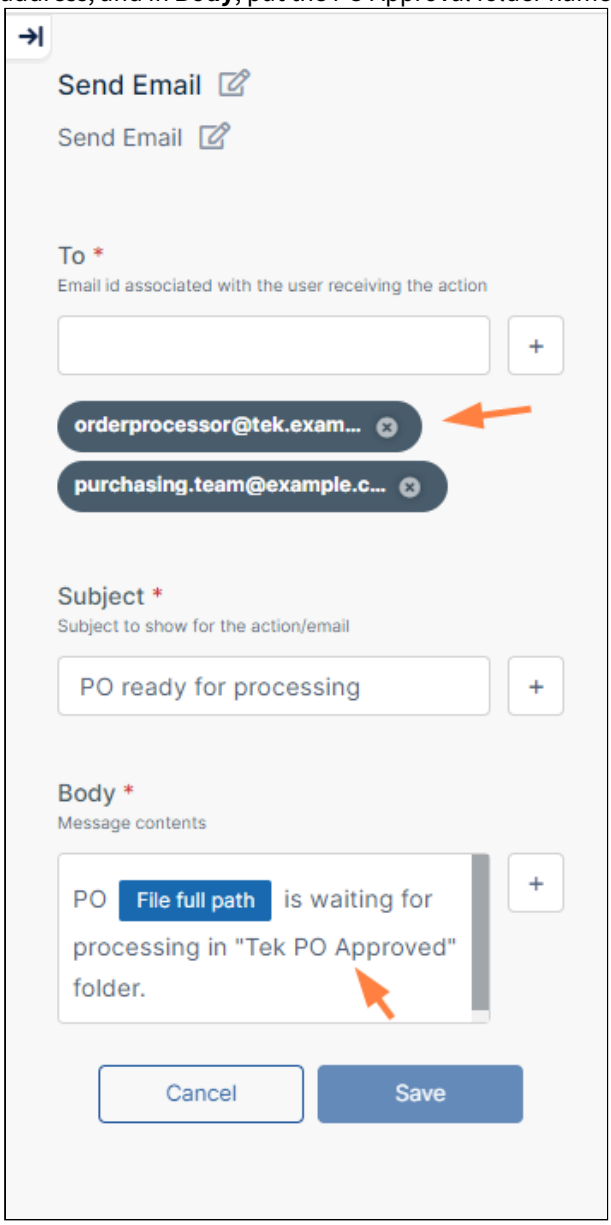




3. On the **Yes** and **No** side of each workflow, in the **Move** steps, choose the correct **PO Approved** and **PO Rejected** folder path for each specific vendor.



4. On the **Yes** side of each workflow, in the **Send Email** step, in **To** put the correct vendor's order processor email address, and in **Body**, put the PO Approval folder name for the specific vendor.



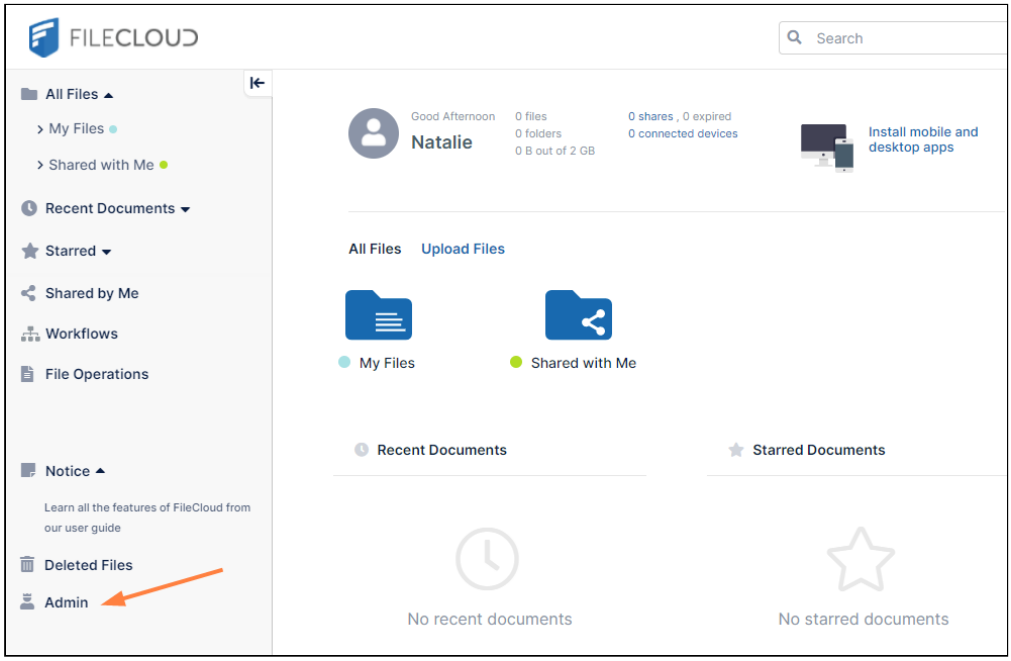
5. In the **Send Email** step on the **No** side of each workflow, in **Body**, put the **PO Approval** folder name for the specific vendor.
6. Test each additional workflow.

Mini Admin Portal

The mini admin portal is available to you if you are an admin user with the required access. It enables you to perform admin tasks from the user portal.

An admin user is a user who has been given access to any number of operations in the FileCloud admin portal. **FileCloud Admins**: You must give users an admin role with **Mini Admin** access to enable them to use the mini admin portal. See Managing Admin Users for help.

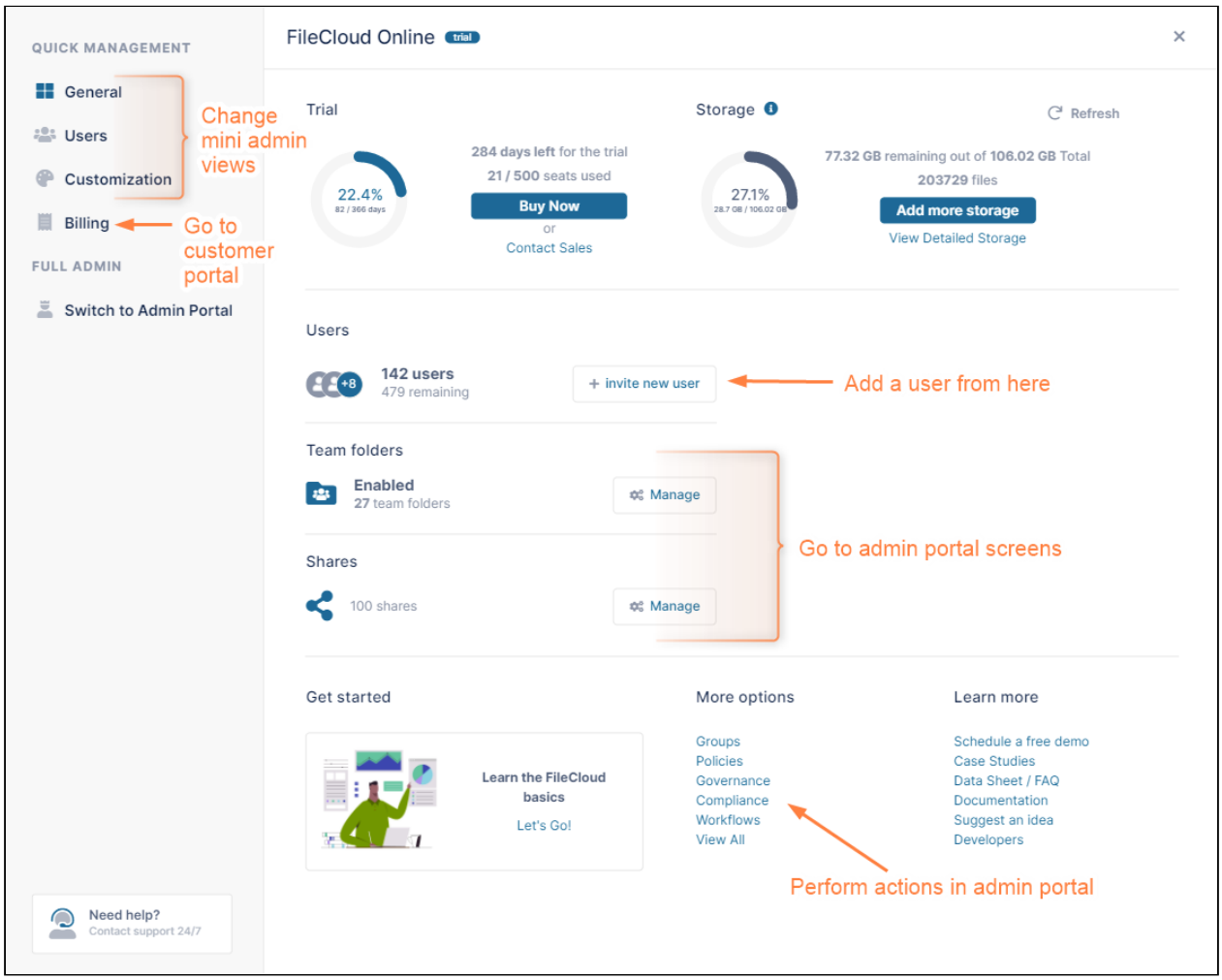
You have mini admin access if you see an **Admin** link in the navigation panel of the user portal.



Opening and navigating the mini admin portal

To open the mini admin portal:

- In the navigation panel, click the **Admin** link.
  The mini admin portal opens. Some links are only visible to you if your admin role has the required permission.



- The first three links in the navigation panel (**General**, **Users**, **Customization**) take you to the different views of the mini admin portal, described below.
- The **Billing** link takes you to the FileCloud customer portal.
- The **Switch to Admin Portal** link logs you into the admin portal, where you can perform all of the admin functions that you have access to.

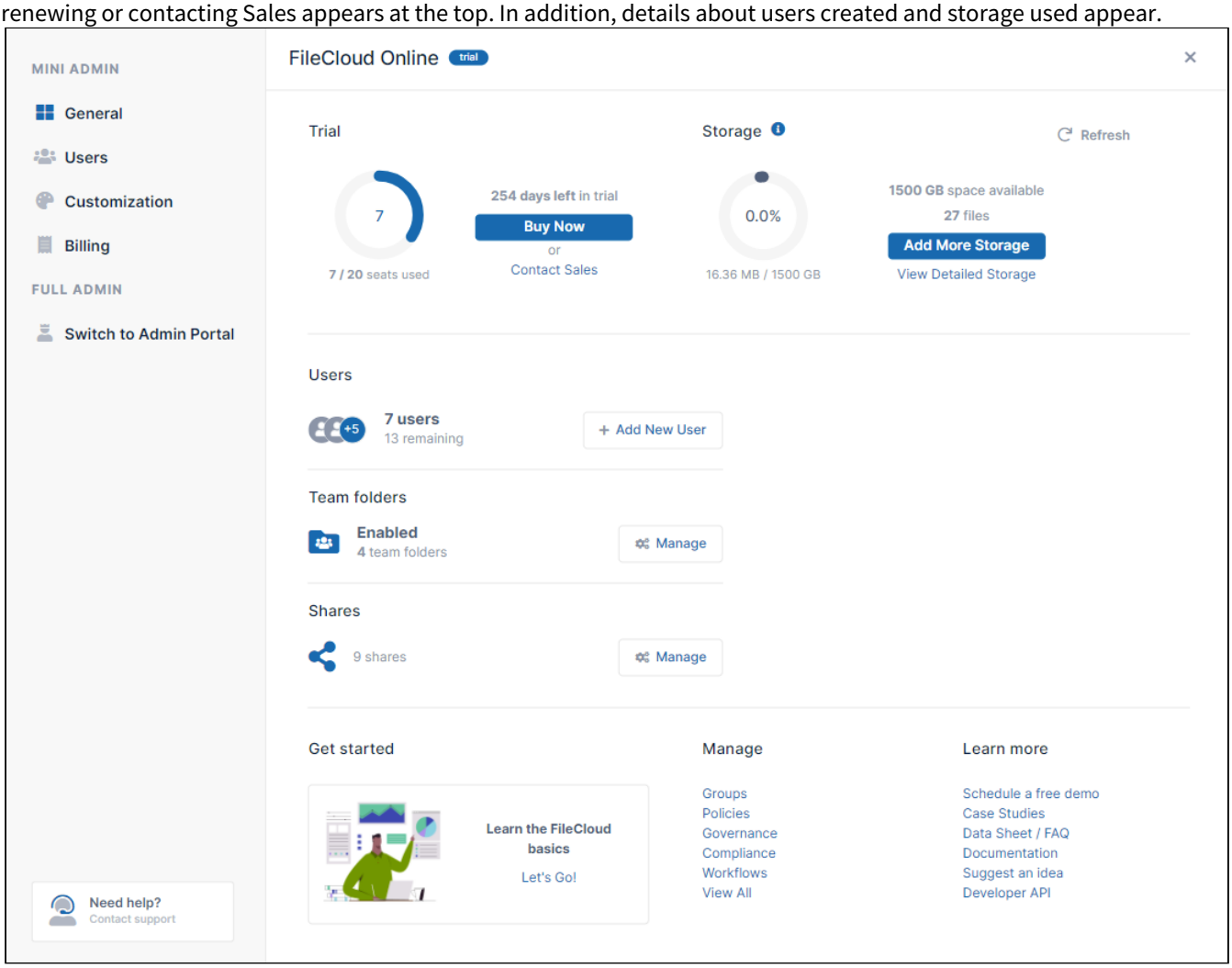
Working in the mini admin portal

The first three links in the navigation panel take you to different views of the mini admin portal.

General view

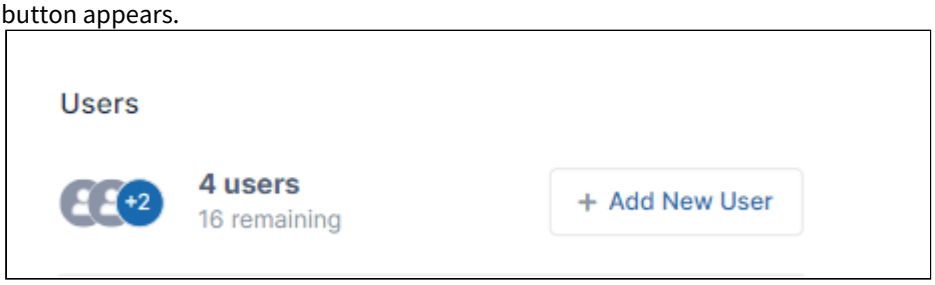
If you are using FileCloud on a trial basis, at the top of General view, information about the trial duration and links for purchasing FileCloud or contacting Sales appear. If your site is live, information about days until renewal with links for

renewing or contacting Sales appears at the top. In addition, details about users created and storage used appear.

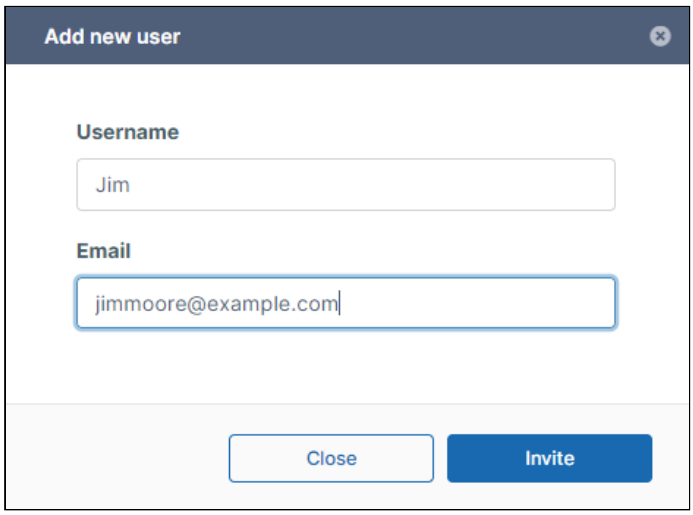


The options that follow depend on your admin access.

- If you have any user permissions, the user count appears. If you have **add user** permission, the **Add New User** button appears.

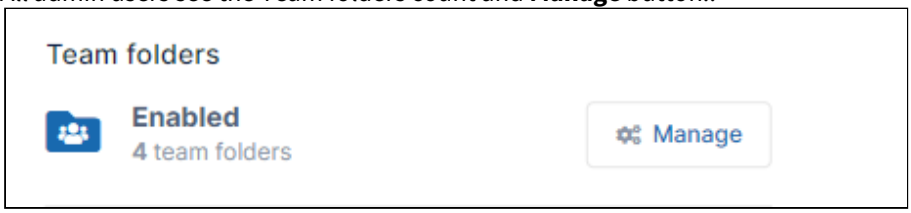


Clicking **Add New User** opens a dialog box for adding a new user:



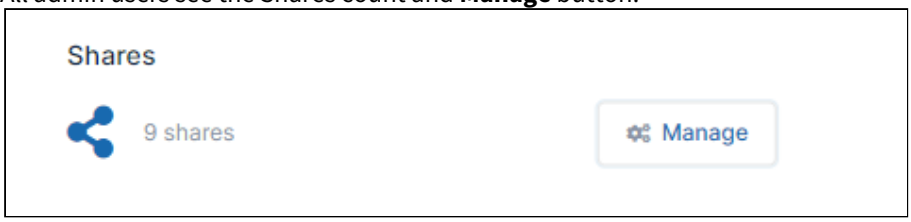
The dialog box only requires you to enter the **Username** and **Email**. The new user is given full access and sent a new account email notification including their username and password. To specify additional settings, such as access level, or to block the email notification, enter the new user from the admin portal.

- All admin users see the Team folders count and **Manage** button..



Clicking **Manage** opens the Team Folders screen in the admin portal.

- All admin users see the Shares count and **Manage** button.

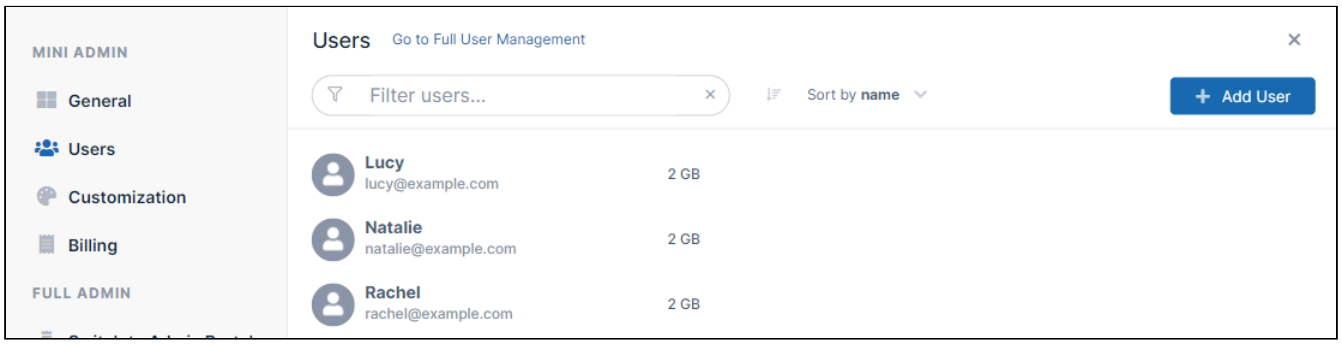


Clicking **Manage** opens the Manage User Shares screen in the admin portal.

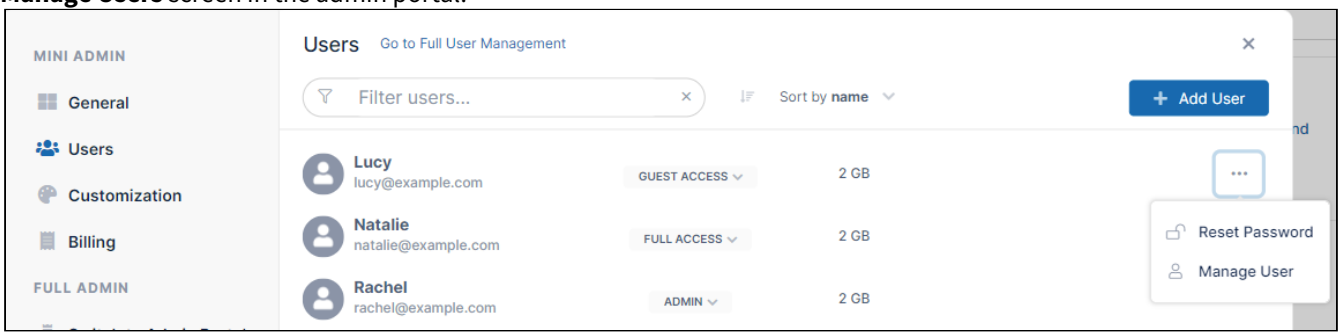
Users view

You can only see information on the **User** view of the mini admin portal if you have an admin role with user permissions.
If you have user permissions that don't include **update user** permission, you see a list of users with their maximum storage amounts. If you have **add user** permission, the **Add User** button appears.

> FileCloud Admins: If mini admin create permission is not checked for the admin role, the admin user is not able to add the new user.

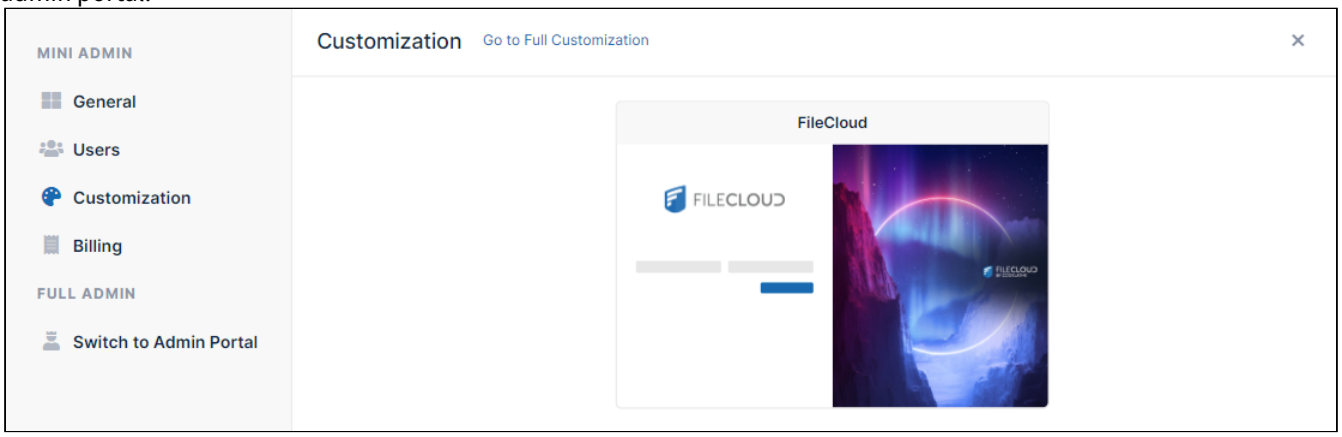


If you have user permissions that include **update user** permission, you also see the users' account types and the **Reset Password** and **Manage User** options.
Reset Password enables you to reset the password in a dialog box that opens here; **Manage User** takes you to the **Manage Users** screen in the admin portal.



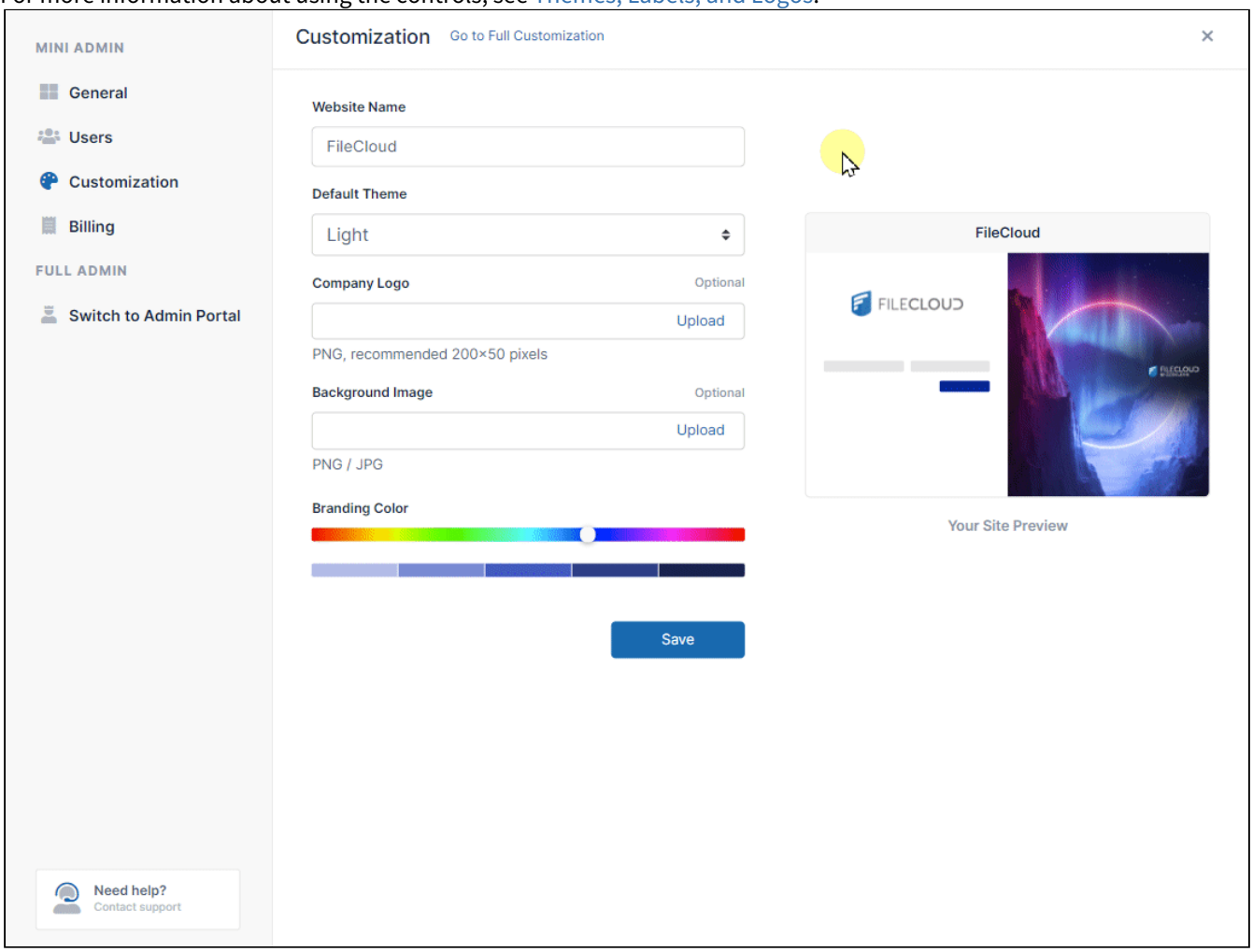
Customization view

You can only see information on the **Customization** view of the mini admin portal if you have an admin role with customize permissions.
If you have **read customization** permission but not **update customization** permission, you see a view of what the user login screen looks like and a **Go to full customization** link that takes you the to **Customizations** screen in the full admin portal.



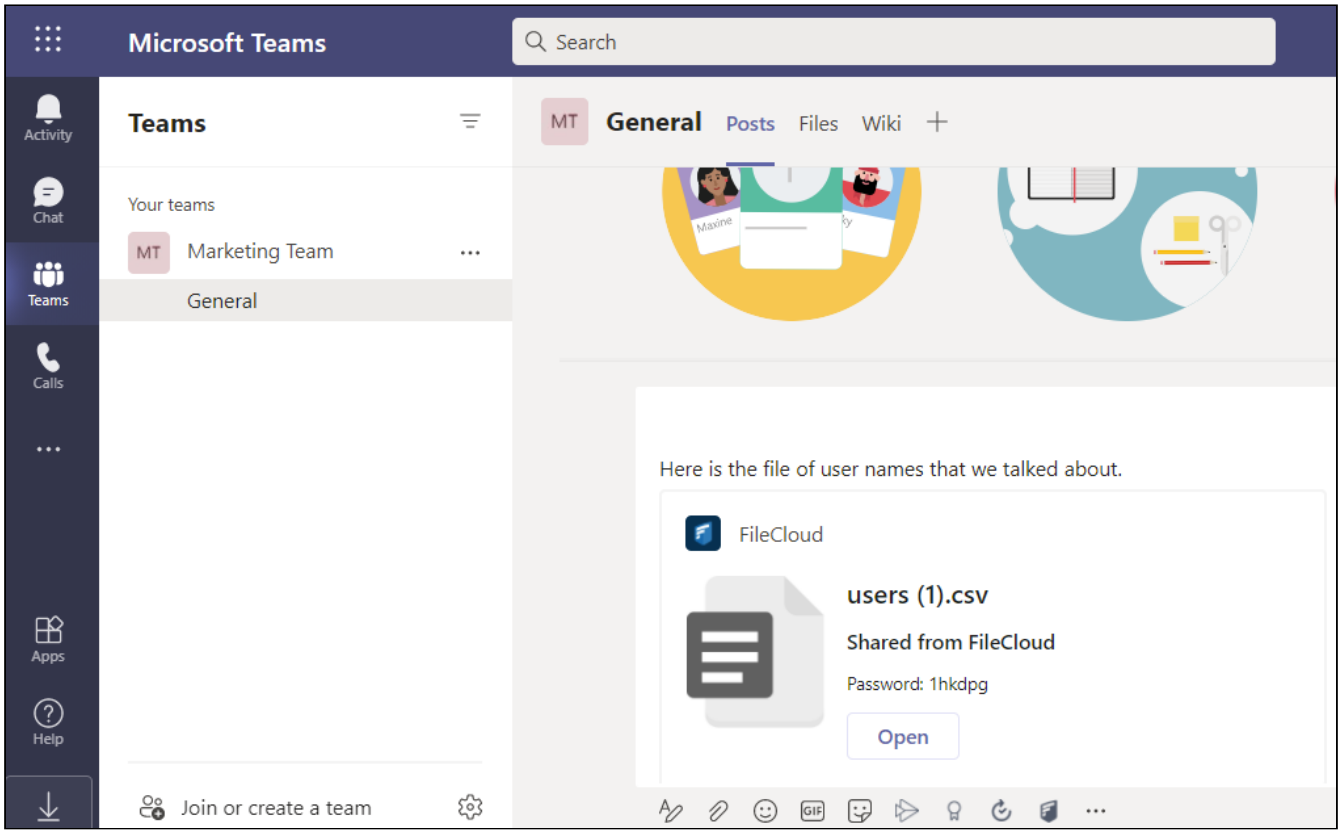
If you have read and update customization permissions, you also see controls for customizing your user interface. As you make changes, they appear on the image of the user login screen.

For more information about using the controls, see Themes, Labels, and Logos.



Integration with MS Teams

FileCloud can be configured to function within MS Teams so you can share content in Team's chats and channels and view the FileCloud browser while working in Teams.



Before you can set up MS Teams to work with FileCloud, your administrator must configure the integration. Check with your administrator before you follow the setup instructions in Adding the FileCloud App to MS Teams.

> ⓘ If you are an admin, see Microsoft Teams.

- Adding the FileCloud App to MS Teams
  - Sharing FileCloud Content in MS Teams
  - Opening the FileCloud User Portal while working in MS Teams

Adding the FileCloud App to MS Teams

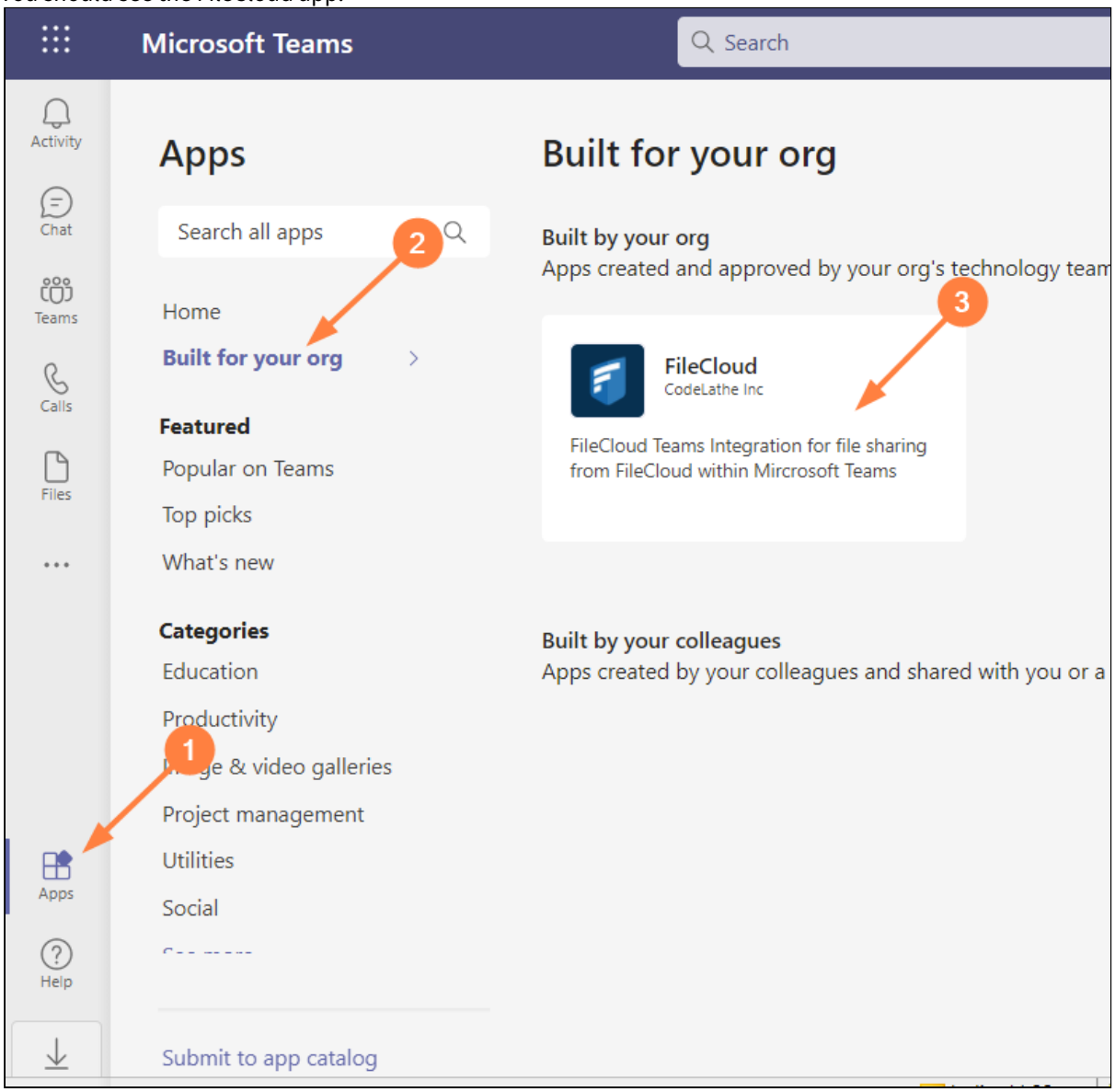
Before you can set up MS Teams to work with FileCloud, your administrator must configure the integration. Check with your administrator before you perform the following steps.

To access FileCloud and its content from inside MS Teams, add the FileCloud app to MS Teams.

To add the FileCloud app to your MS Teams account:

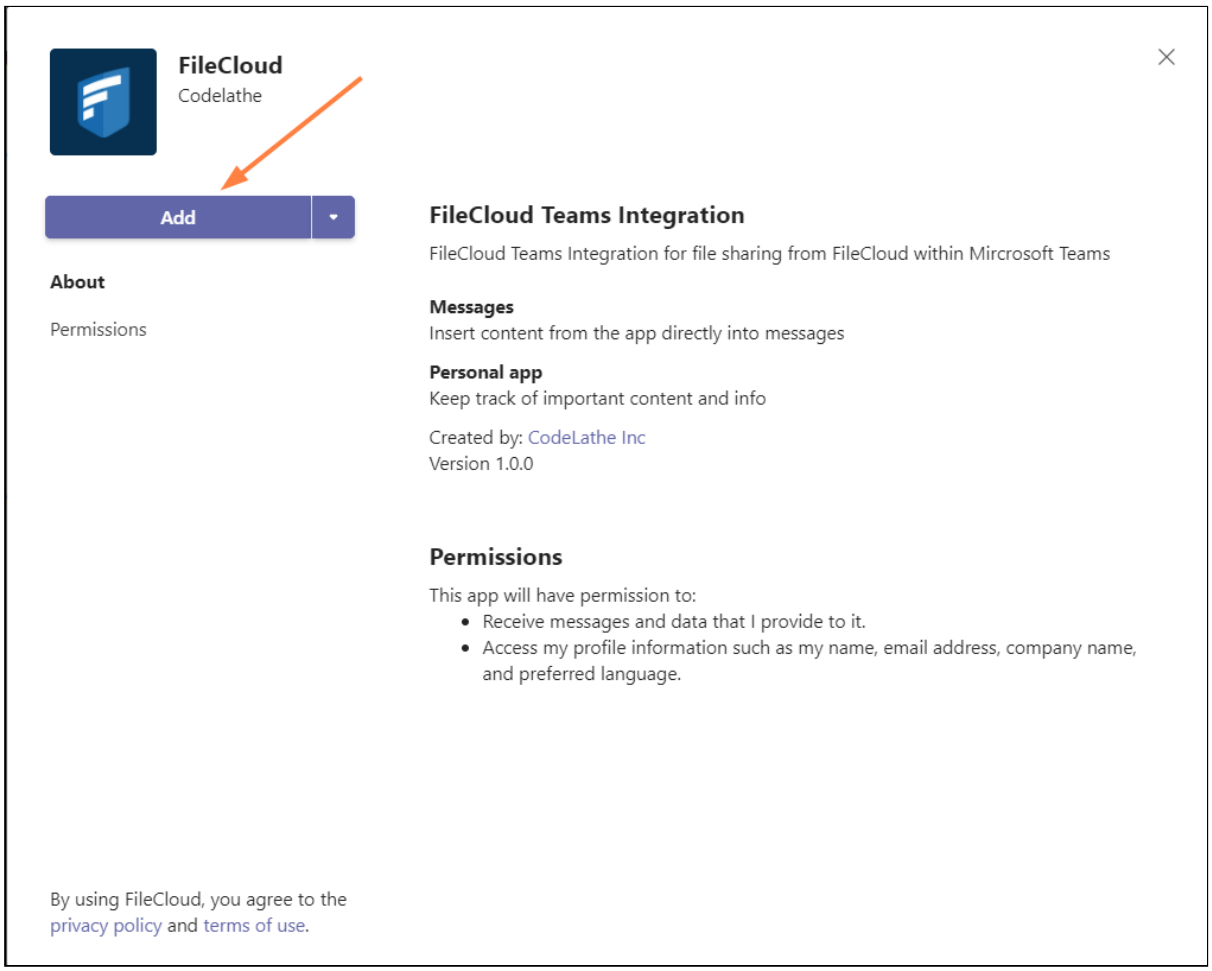
1. In MS Teams, click the **Apps** icon in the navigation bar.

2. In the left panel, click **Built for Your Org**.
You should see the FileCloud app.



6 Adding FileCloud app within MS Teams

3. Click the FileCloud app icon to open it, and then click **Add**.



7 Add FileCloud app button

You can now open the FileCloud user portal in MS Teams, and share FileCloud content in channel messages.

To use it see:

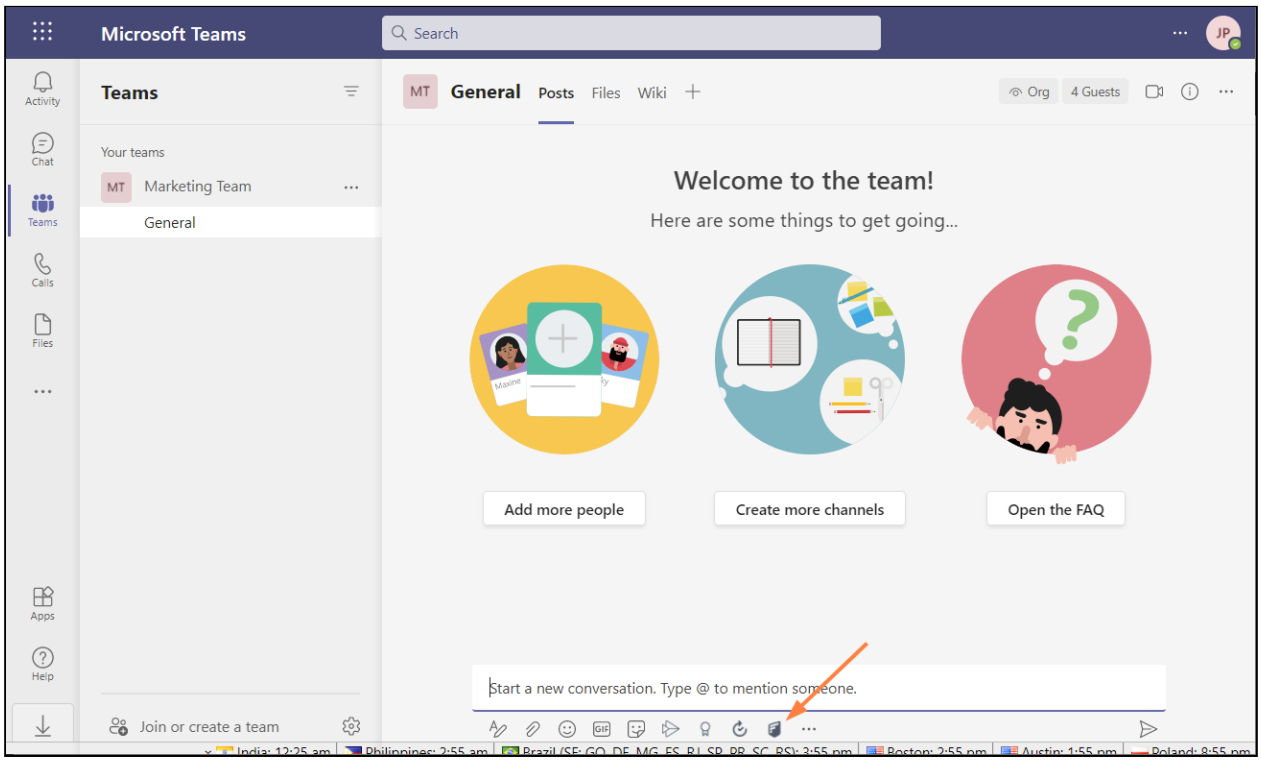
- Sharing FileCloud Content in MS Teams
- Opening the FileCloud User Portal while working in MS Teams

Sharing FileCloud Content in MS Teams

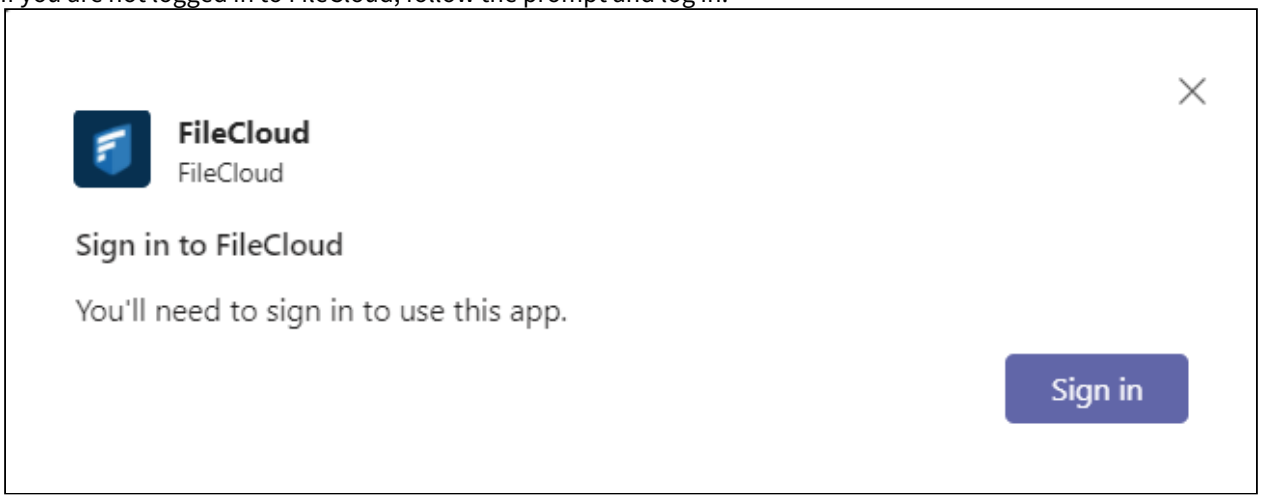
Once FileCloud has been integrated with MS Teams, you can access FileCloud in a channel or a chat.

To access FileCloud in Teams:

1. Open Teams and go to one of your teams.
2. Begin a new message.
   Below the message line a FileCloud icon appears with other icons.

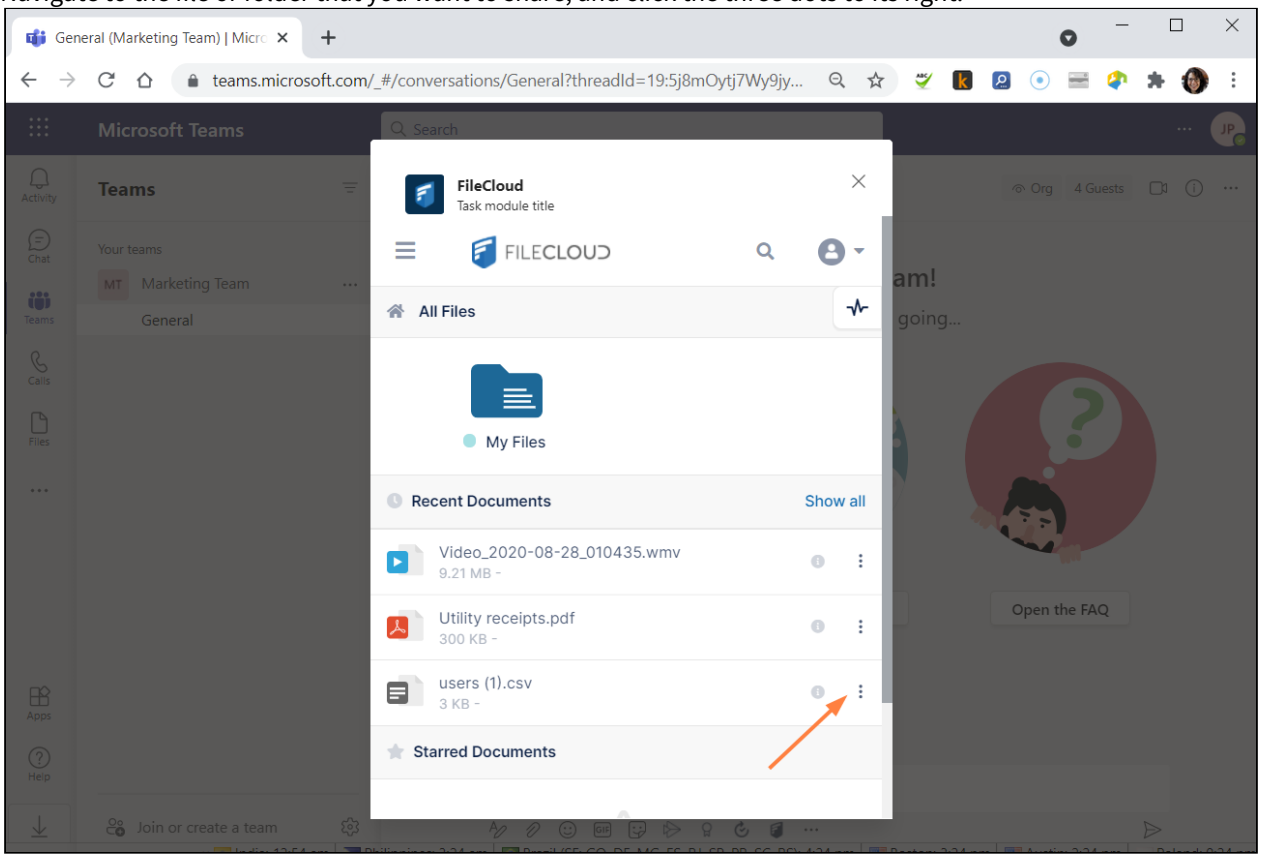


3. Type in your message. At the position where you want to include a link to FileCloud content, click the FileCloud icon.
If you are not logged in to FileCloud, follow the prompt and log in.



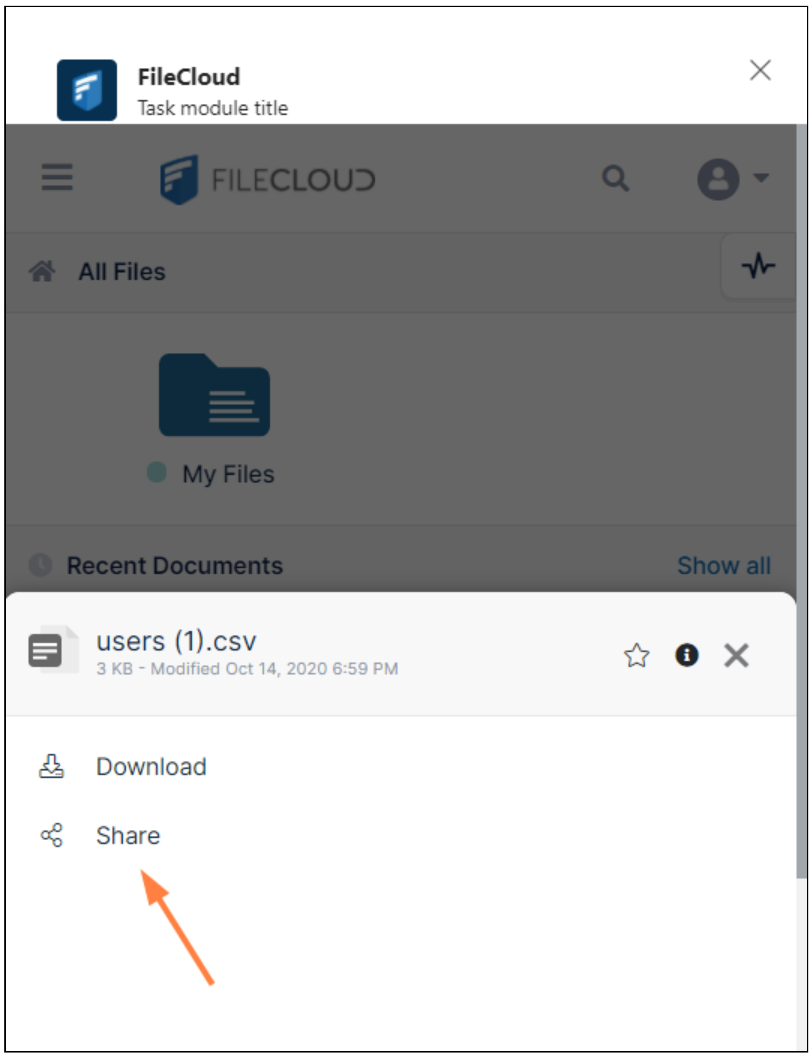
A FileCloud window displaying your FileCloud folders opens.

4. Navigate to the file or folder that you want to share, and click the three dots to its right.



Download and **Share** options are shown.

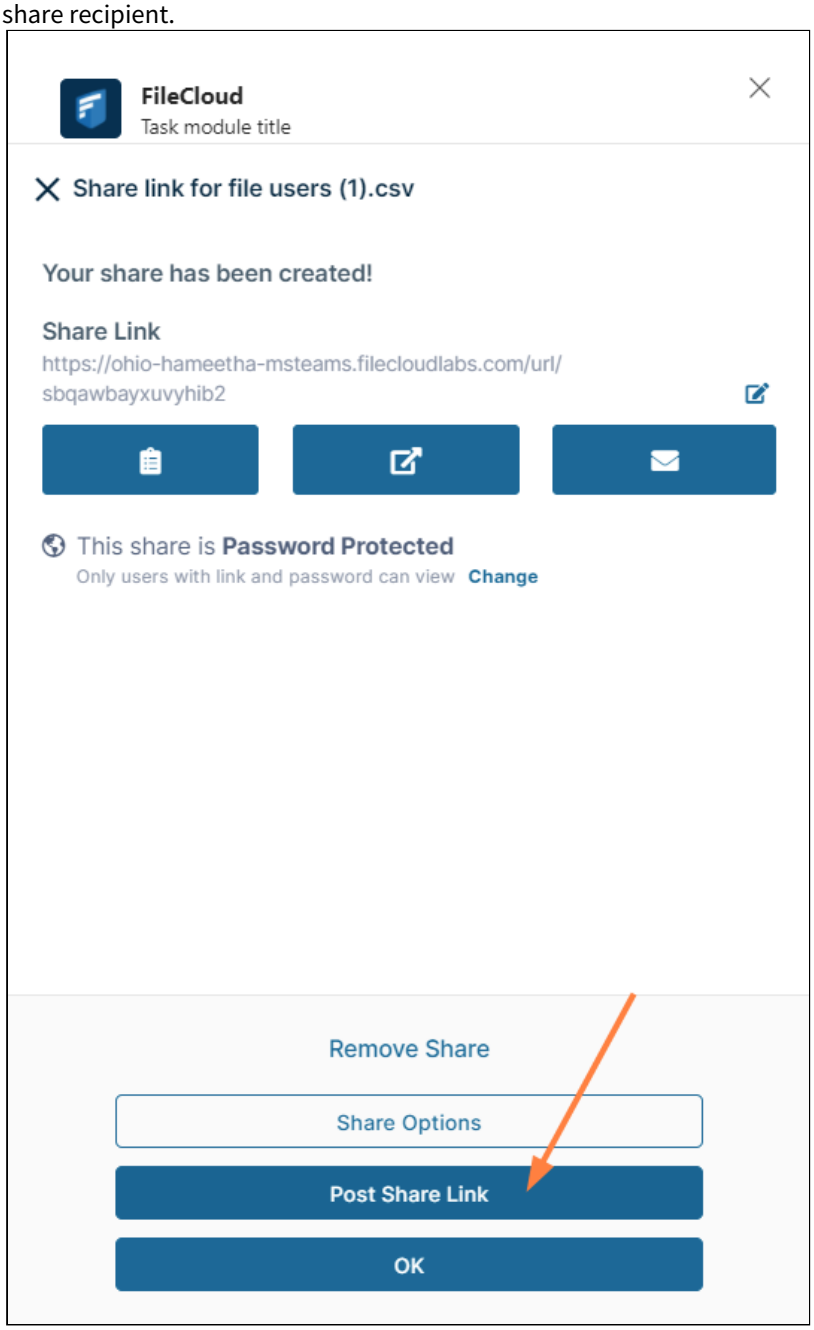
5. Click **Share**.



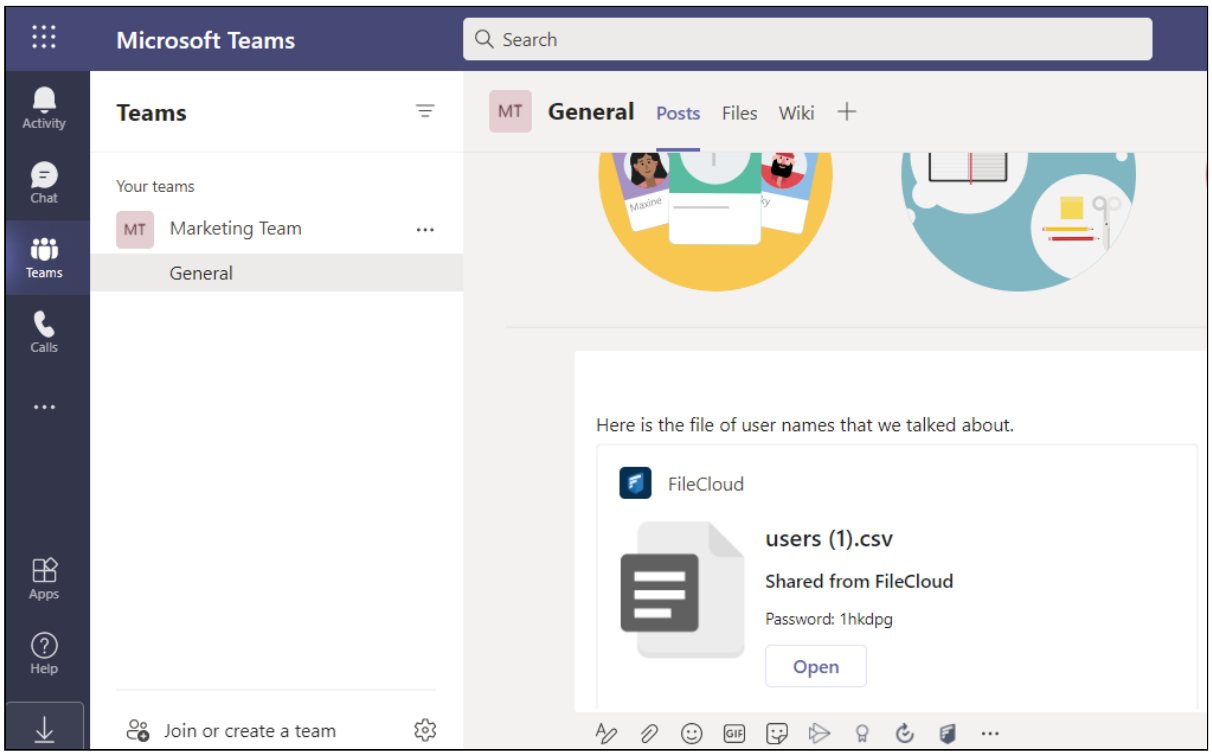
A screen that lets you set share options or take other share actions opens.

6. Set any share options. See the links below for help with share options.
   If you choose to make the share password protected, the password appears in the share message sent to the

share recipient.



7. Click **Post Share Link**.
   The link becomes available in the message:



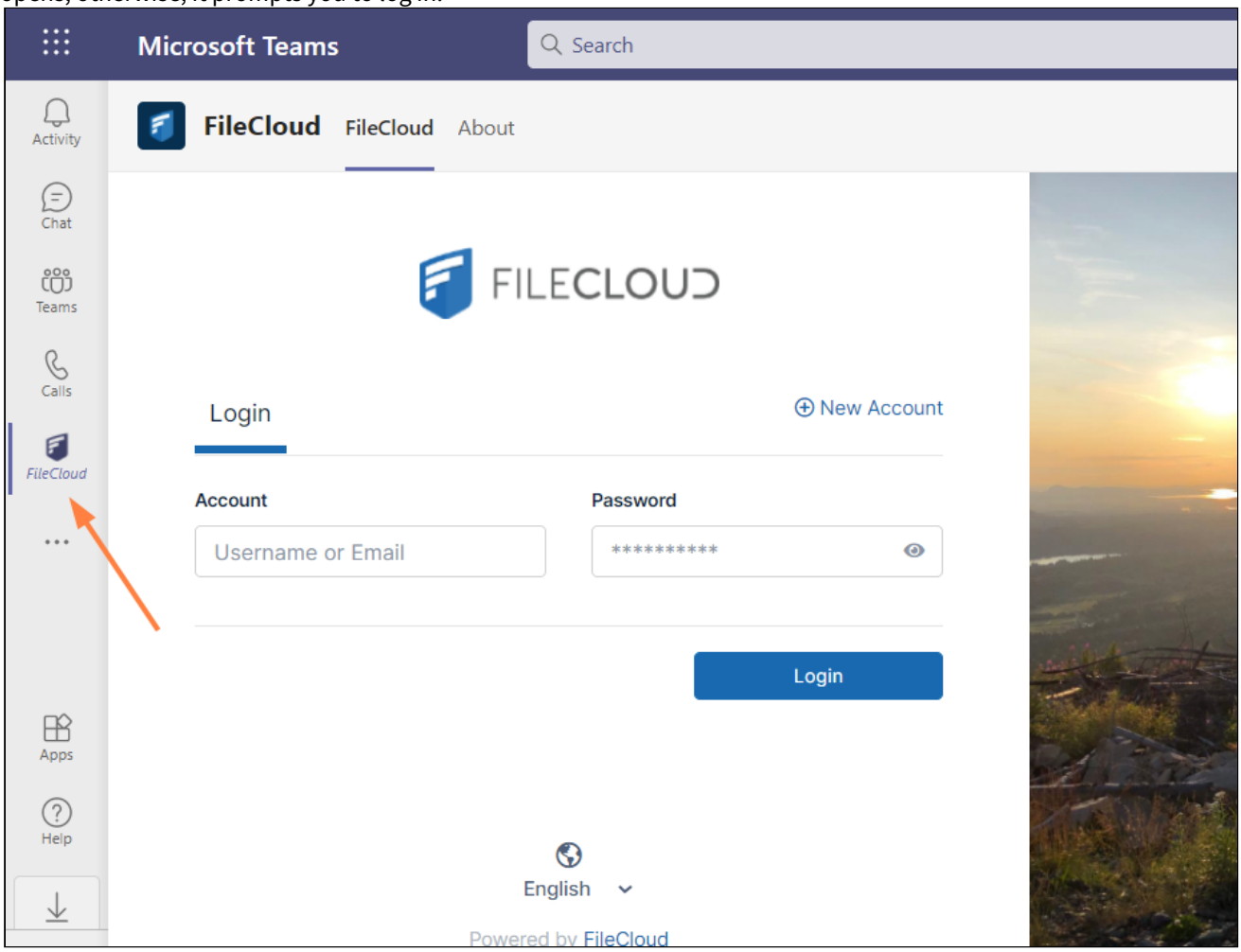
Members of the team can click **Open** to access the share.

For information about share options, see:
Public Share Options for Files
Private Share Options for Files
Share Options for Public and Private Folders

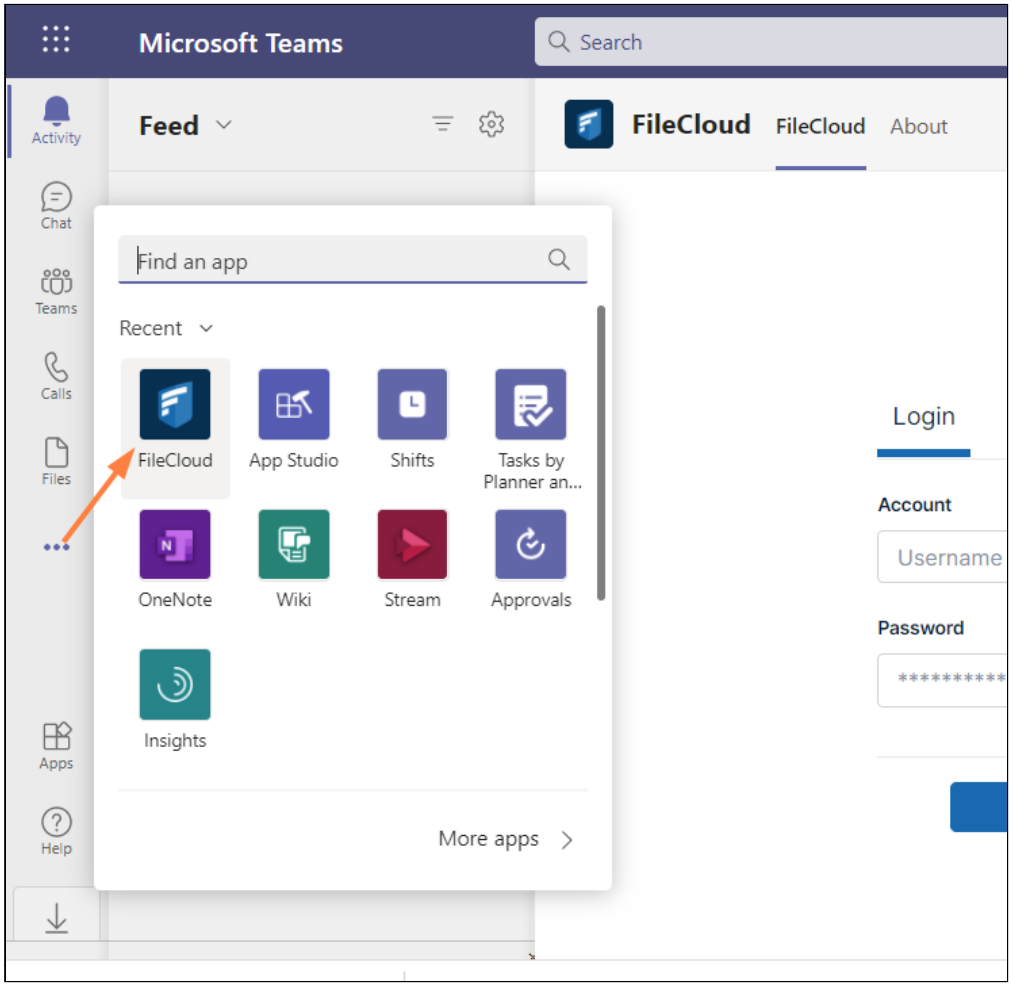
Opening the FileCloud User Portal while working in MS Teams

Once FileCloud has been integrated with MS Teams, you can click the FileCloud tab to open the full user portal while working in MS Teams.

In the navigation panel of MS Teams click the FileCloud tab (FileCloud icon). If you are already logged in, FileCloud opens; otherwise, it prompts you to log in.



If the FileCloud icon is not visible in the navigation bar, click the three dots, and in the window that opens, click the FileCloud icon.



FileCloud Automation App

Use the command line based FileCloud Automation app to integrate FileCloud with your existing business processes. The Automation app enables you to perform operations such as extracting files out of FileCloud and uploading files into FileCloud.

Installation of the the app is straight forward, just download the zip file and unzip it to any folder and run the **cloudapi** executable.

Supported arguments

The following arguments are currently processed by the app.

Argument	Explanation
-?	Show Help
--user	username to use to do the action
--password	password for the associated user
--host	full URL to the server, e.g. http://files.xyz.com
--operation	type of operation to perform (more details below)
--remotepath	usually remote path in the server
--remotename	usually remote name in the server
--localpath	usually local path in the local machine
--sslverify	whether to enable/disable ssl verification Values: **VERIFY_STRICT** - (default) enable strict SSL verification **VERIFY_NONE** - disable SSL verification

Supported operations and examples

Operation	Detailed Description
UPLOAD	Uploads a specific local file to the remote server ***cloudapi --user USERNAME --password PASSWORD --host SERVERURL --operation UPLOAD --remotepath PARENTPATH --localpath FILEPATH --sslverify VERIFY_STRICT*** *Example:* *cloudapi --user john --password mypassword --host http://files.xyz.com --operation UPLOAD --remotepath /john/myfolder --localpath c:/users/john/desktop/doc1.docx -sslverify VERIFY_STRICT*
DOWNLOAD	Downloads a specific file from the remote server to the local location ***cloudapi --user USERNAME --password PASSWORD --host SERVERURL --operation DOWNLOAD --remotepath FULLPATH --remotename NAME --localpath FILEPATH --sslverify VERIFY_STRICT*** *Example:* *cloudapi --user john --password mypassword --host http://files.xyz.com --operation DOWNLOAD --remotepath /john/myfolder/doc1.docx --remotename doc1.docx --localpath c:/users/john/desktop/doc2.docx -sslverify VERIFY_STRICT*
CREATEFOLDER	Create a remote folder on the server **cloudapi --user USERNAME --password PASSWORD --host SERVERURL --operation CREATEFOLDER --remotepath PARENTPATH --remotename NAME *--sslverify VERIFY_STRICT*** *Example:* *cloudapi --user john --password mypassword --host http://files.xyz.com --operation CREATEFOLDER --remotepath /john/myfolder --remotename newfolder -sslverify VERIFY_STRICT*
DELETE	Delete a file or folder on the server **cloudapi --user USERNAME --password PASSWORD --host SERVERURL --operation DELETE --remotepath PARENTPATH --remotename NAME --*sslverify VERIFY_STRICT*** *Example:* *cloudapi --user john --password mypassword --host http://files.xyz.com --operation DELETE --remotepath /john/myfolder --remotename doc1.docx -sslverify VERIFY_STRICT*

Operation	Detailed Description
UPLOADFOLDER	Uploads a folder recursively from the local machine to the remote server on the specified path **cloudapi --user USERNAME --password PASSWORD --host SERVERURL --operation UPLOADFOLDER --remotepath PARENTPATH --localpath LOCALFOLDERPATH --*sslverify VERIFY_STRICT*** *Example:* *cloudapi --user john --password mypassword --host* http://files.xyz.com *--operation UPLOADFOLDER --remotepath /john/myfolder --localpath c:/users/john/desktop/localdata -sslverify VERIFY_STRICT*
DOWNLOADFOLDER	Downloads a folder recursively from the remote server to the local machine. Download will skip files if they are already present and if they have the same size as the size on the server. **cloudapi --user USERNAME --password PASSWORD --host SERVERURL --operation DOWNLOADFOLDER --remotepath FULLPATH --localpath LOCALFOLDERPATH --*sslverify VERIFY_STRICT*** *Example:* *cloudapi --user john --password mypassword --host* http://files.xyz.com *--operation DOWNLOADFOLDER --remotepath /john/myfolder --localpath c:/users/john/desktop/localdatabakup -sslverify VERIFY_STRICT*

All example commands in the table specify paths for locally managed storage (My Files).

To create a folder in a public share specify the path as::

```
cloudapi.exe --user john --password mypassword --host https://test.filecloudlabs.com
--operation CREATEFOLDER --remotepath "/SHARED/!YvTLNFLKvF2ME6WWy/eNSaRm0tpHrwe2LQ"
--remotename newfolder -sslverify VERIFY_STRICT
```

The remote path "/SHARED/!YvTLNFLKvF2ME6WWy/eNSaRm0tpHrwe2LQ" is obtained from the share url.

Restrictions on Filenames and File Types in FileCloud

Please note the following restrictions when uploading files to FileCloud:

- 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.
- FileCloud cannot upload files with leading spaces in the filename.
- By default, files with the extensions **php**, **php5**, **phar**, and **phtml** cannot be uploaded into FileCloud.

For Admins

- To specify which file extensions may be uploaded into FileCloud, see Managing File Extensions and Restricting File Extensions.
- To restrict certain filenames from being uploaded into FileCloud, see Restricting File Names.