



# FileCloud Online Version 23.232

## Client Applications and Add-ins

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This section includes the following help topics:

## Comparison of FileCloud Sync and Drive

You can use the following FileCloud tools to access and manage your files stored and shared in the cloud:



FileCloud Sync



FileCloud Drive

### When should I use FileCloud Sync and when should I use FileCloud Drive?

Deciding on which tool to use depends on how you want to access and manage your files. It can also depend on some of the following factors:

- Company policy
- Internet connectivity
- Security policies

Use the information in Table 1 to understand the difference in the tools and choose which is the best one for you. You can also decide to use them both!


**Table 1. FileCloud Sync vs. Drive**

USE CASES	
FileCloud Sync	FileCloud Drive
Offline copy is needed for reasons such as traveling & intermittent network access.	Offline copy is not needed or not allowed per company policy
Team collaboration	View FileCloud server files as a drive. User doesn't want files to be downloaded for local copy. File downloaded only in edit.
Recommended when lots of files needs to be moved to the FileCloud Server. The process is a lot more efficient than uploads.	Doesn't consume permanent storage. Ideal for newer laptops with SSDs where hard disk capacity is limited
Recommended If you are working with files that are 1 GB or larger, because they are stored directly in File Explorer.	Recommended for working with small to medium sized files  When you try to open a large file in an application via FileCloud Drive, it is not instantaneously available like smaller files. Depending on your network connectivity, this could take longer than several seconds.

Locally view FileCloud files & have a selective and/or all files/folder from FileCloud as copy on Desktop	Scenario where you need access to TBs of files and don't want every file to be synced.
Better in editing large files such as AutoCAD	Easier on bandwidth usage - all files doesn't need to be downloaded and uploaded. Use to upload, edit, or download a small number of files or small documents.
Better when working on files directly from your HDD	
Better when editing linked documents such as graphic files that link to multiple other files.	
Ideal Dropbox replacement - great offline edits.	
<b>CHALLENGES</b>	
<b>FileCloud Sync</b>	<b>FileCloud Drive</b>
Requires storage space on the HDD to store offline files	Requires active and stable internet connection
Are files downloaded to desktop? <ul style="list-style-type: none"> <li>• Yes, synchronized with FileCloud Server periodically</li> </ul>	Are files downloaded to desktop? <ul style="list-style-type: none"> <li>• Files are downloaded only on edit</li> <li>• Upon save, file is synchronized back to FileCloud server</li> </ul>
How does locking work? <ul style="list-style-type: none"> <li>• No deliberate locking can be issued in FileCloud Sync client.</li> <li>• As files are proactively synced between FileCloud Server &amp; Sync Client - Conflicts &amp; updates are notified on Sync.</li> </ul>	How does locking work? <ul style="list-style-type: none"> <li>• Automatically lock on edit in FileCloud Drive.</li> <li>• If lock is not possible, edit will be prevented and server copy will not be changed</li> </ul>
<b>OTHER FEATURES</b>	
<b>FileCloud Sync</b>	<b>FileCloud Drive</b>
Selective Sync - Not all files under FileCloud is copied to Desktop	Map FileCloud folders as a Drive
Actively Bi-directional	Set limit on file size at Drive level

FileBrowser app to edit and browse all documents via a explorer like interface

## How do FileCloud Sync & Drive compare with WebDAV Clients?

-  FileCloud is preparing to deprecate WebDAV.
- Beginning with FileCloud 23.1, WebDAV can no longer be enabled or managed through the FileCloud admin portal.
  - At some time in 2024, WebDAV will no longer be available in FileCloud.


For help enabling or disabling WebDAV currently, please [Contact FileCloud Support](#).

You can download WebDAV clients to interact with your files on FileCloud Server.

For comparisons between FileCloud client applications and a WebDAV client, see the following tables.

**Table 2. FileCloud Client Apps vs. WebDAV Features**

Feature	FileCloud Drive	FileCloud Sync	WebDAV*
Connection	Virtual File System	Hard drive	Virtual File System
Offline Copy of Files	No	Yes	No
Remote Wipe	Yes	Yes	No
Cost	Free	Free	Some of the WebDAV like WebDrive are paid ones whereas some are free.
Ideal for	Editing Small Files	Editing all Files	Editing Small Files
Operating Systems	Windows and MAC	For Windows , MAC and LINUX	For Windows , MAC and LINUX

 Although FileCloud is compatible with WebDAV clients, FileCloud does not provide it's own WebDAV client.

**Table 3. FileCloud Client Apps vs. WebDAV Use Cases**

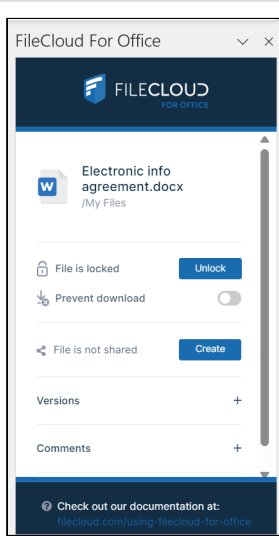
Operation	Drive	Sync	WebDAV
Logging in with HTTP and HTTPS	Yes	Yes	Yes

<b>Operation</b>	<b>Drive</b>	<b>Sync</b>	<b>WebDAV</b>
Browse Folders	Yes	Yes	Yes
Create New Directory	Yes	Yes	Yes
Upload Files	Yes	Yes	Yes
Download Files	Yes	Yes	Yes
Edit/Update	Yes	Yes	Yes
Copy , Move, Delete	Yes	Yes	Yes
Block device ( admin )	Yes	Yes	No
Remote Wipe a device	Yes	Yes	No
Add/Remove Admin Messages	Yes	Yes	No
Audit Logs	Yes	Yes	Yes
Backing up system data	No	Yes	No
Network Shares	Yes	Yes	Yes



## Using FileCloud for Office

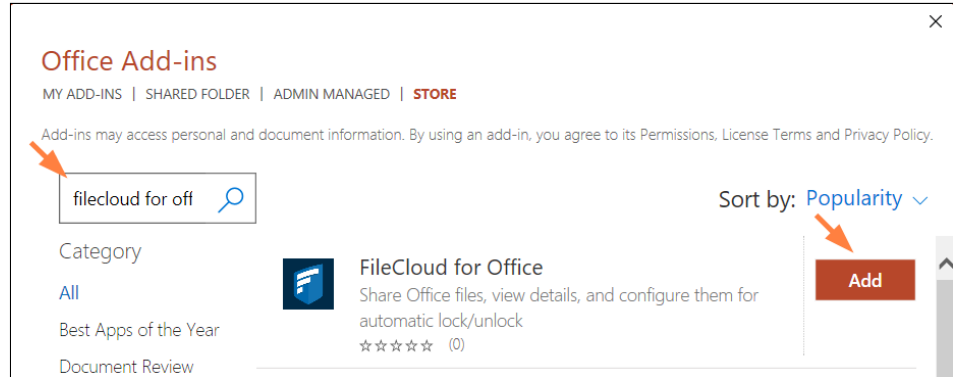
- ① FileCloud for Office is an MS Office add-in for Word, Excel, and PowerPoint files which can be used in both Windows and macOS with FileCloud Sync, FileCloud Drive, and FileCloud Desktop. It is available in FileCloud beginning with version 23.1.  
Prior to version 23.1, [DocIQ](#) was available for similar operations. DocIQ is still available in Sync and Drive for previous users who want to continue using it but will be deprecated later this year.



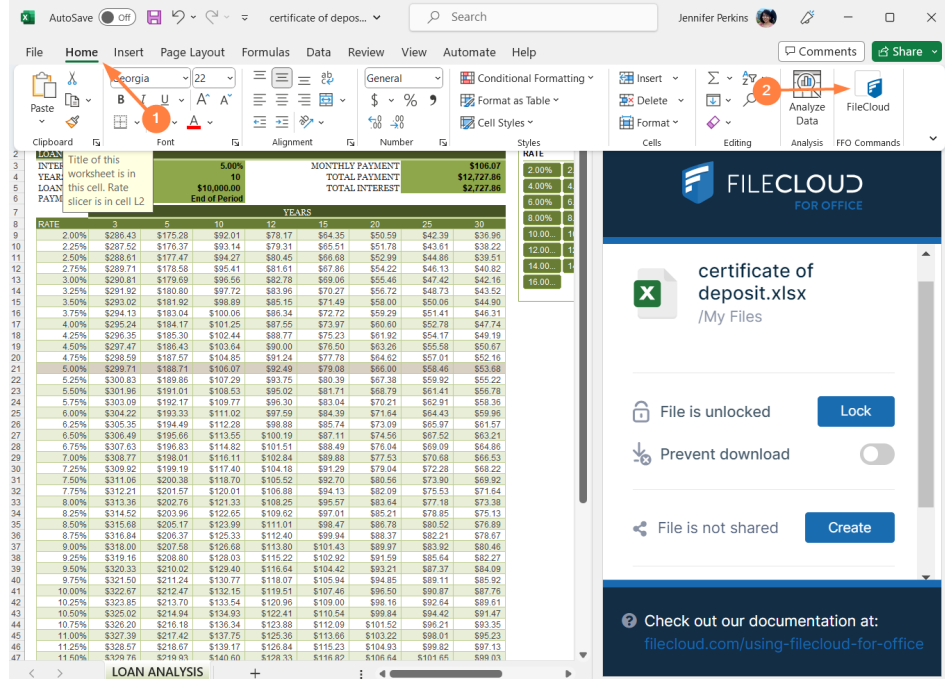
### How do I install FileCloud for Office?

To add FileCloud for Office to the Office files that you access through the client app, perform the following procedure once each for a Word, an Excel, and a PowerPoint file in the client.

1. Open the Office file from the client application.
2. Click **Insert > Get Add-ins**.
3. In the **Office Add-ins** search box, enter **FileCloud for Office** and click Enter. FileCloud for Office is returned.



4. Click **Add** to add FileCloud for Office to the Office file.
5. Click **Home** in the menu bar, and on the right click **FileCloud (FFO Commands)**. A panel showing FileCloud for Office opens on the right.



6. Repeat this for the other two types of Office files.

FileCloud for Office is now attached to all Office files in your client folder. Just click **FileCloud (FFO Commands)** in the toolbar to view it.

**What applications does FileCloud for Office works with?**

- Word
- Excel
- PowerPoint

**What does FileCloud for Office do?**

FileCloud for Office works with Office documents to enable you to:

- automatically lock and unlock files when they are opened and closed
- share files
- access different versions of files

For more information, click the link to the individual client section for FileCloud for Office:

[Using FileCloud for Office with Sync](#)

[Using FileCloud for Office with Drive](#)

[Using FileCloud for Office with FileCloud Desktop for macOS](#)


## FileCloud Sync

### Sync Requirements:

- Synchronized files must be on a physically attached disk to the machine running Sync
- You cannot synchronize files located by a UNC or Network path


You can use FileCloud Sync to keep local copies of your FileCloud folders and files. You access the local copies through Windows Explorer or Mac OSX Finder on your desktop. These files and folders are periodically synchronized with their online copies. In other words, if you have made changes to a local copy of a file, the changes are replicated to the file on your server. If you make changes to a file on your server, the changes are replicated to your local copy of the file. (You also have the option of only copying changes to files made in one of these locations to the other.)

- FileCloud Sync is a client application. This is because it allows you to access the FileCloud Server and the files you store there.
- You can access files in Sync like you do in Windows Explorer or Mac OSX Finder.
- The same features that are available on the User Portal are also available in Sync.
- Sync allows you to easily open the User Portal if you need to.
- You can configure Network Folders as well as My Files to be automatically synchronized to your client.
- You can back up Sync files for safekeeping
- Sync includes an assistant to make it easy to access Sync files from Microsoft applications in FileCloud Server version 18.2 and later.

 FileCloud Sync supports Mac versions OSX 10.14 and above.

In this section:

## Install and Log In to FileCloud Sync

 The ability to install the Share and Search integration with Windows Explorer is available in FileCloud Server version 18.2 and later.  
The ability to install DocIQ is available in FileCloud Server version 18.2 and later.

Beginning in FileCloud Version 21.3, Sync installs into the folder **Program Files** instead of the folder **Program Files(x86)**.

You must install FileCloud Sync before you can begin synchronizing documents on your local computer to the FileCloud Server site.

You can install FileCloud Sync on computers running the following operating systems:

 [Windows](#)

➔ Mac OSX

➔ Linux

## Install Sync on Mac OSX

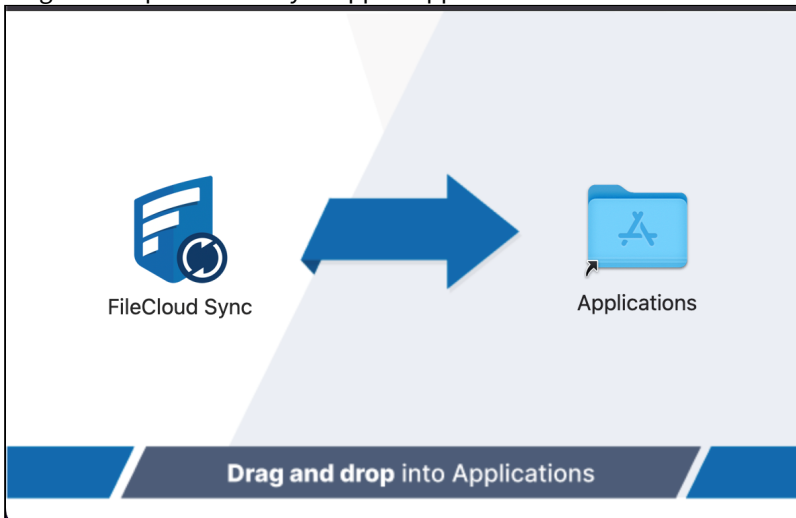
**⚠** Current FileCloud Sync users (DocIQ users): Later this year, DocIQ will be deprecated, and FileCloud will no longer support it. Although you can continue to use DocIQ, we recommend using FileCloud for Office, which can be downloaded from the Office add-ins store. Now, when you upgrade FileCloud Sync, you are given the choice of using FileCloud for Office or continuing to use DocIQ. If you choose to use FileCloud for Office, please see the [FileCloud for Office with Sync documentation](#).

**i** FileCloud Sync supports macOS versions 10.14 and higher.  
The ability to install the Share and Search integration with Windows Explorer is available in FileCloud Server version 18.2 and later.

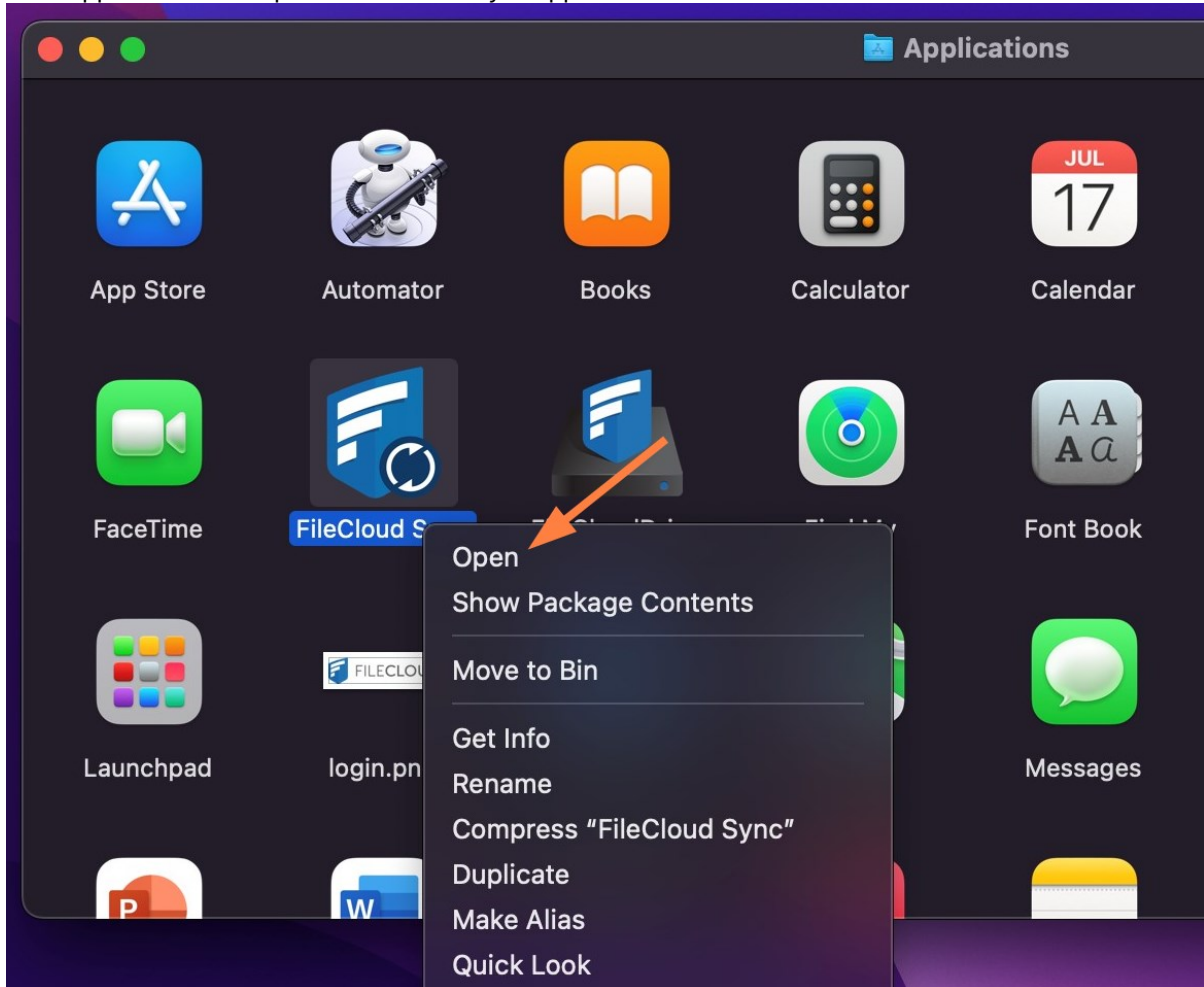
You must install FileCloud Sync before you can begin synchronizing documents on your local computer to the FileCloud Server site.

### To install FileCloud Sync on macOS:

1. Download FileCloud Sync App from <https://www.filecloud.com/additional-downloads/#sync>
2. After successfully downloading the app, run the downloaded dmg file FileCloudSync64.dmg.
3. Drag and drop FileCloud Sync app to Applications.



4. Go to Applications and open the FileCloud Sync App.



## Install Sync on Windows

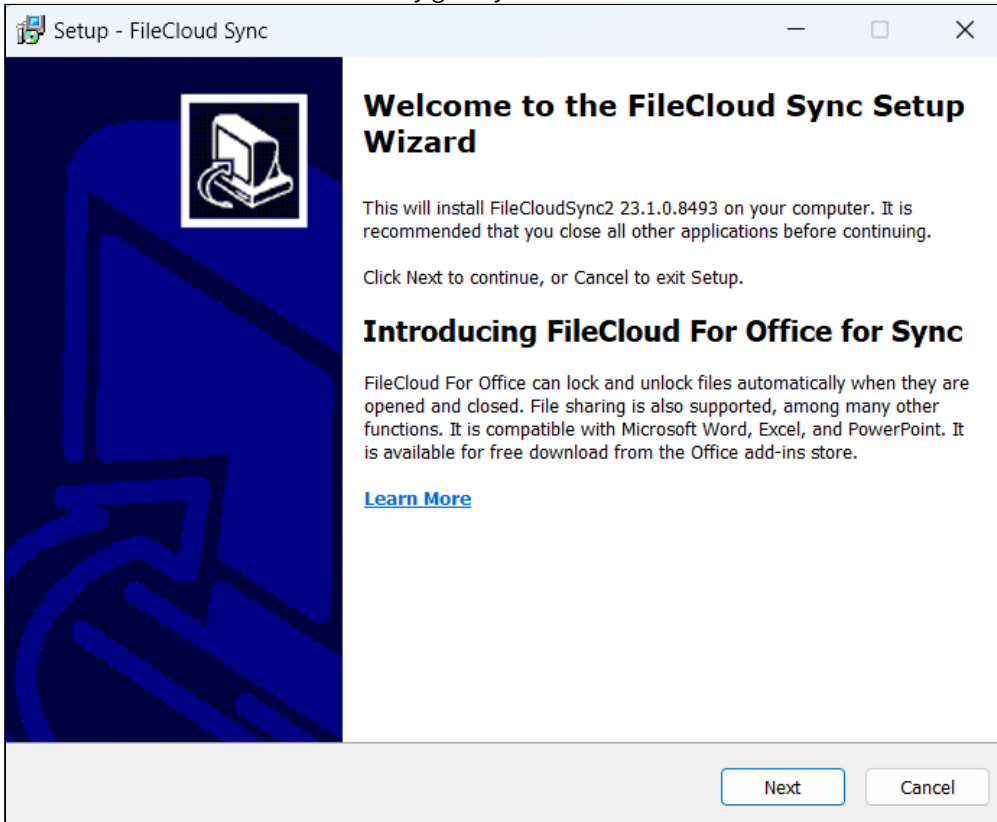
**⚠** Current FileCloud Sync users (DocIQ users): Later this year, DocIQ will be deprecated, and FileCloud will no longer support it. Although you can continue to use DocIQ, we recommend using FileCloud for Office, which can be downloaded from the Office add-ins store. Now, when you upgrade FileCloud Sync, you are given the choice of using FileCloud for Office or continuing to use DocIQ. If you choose to use FileCloud for Office, please see the [FileCloud for Office with Sync documentation](#).

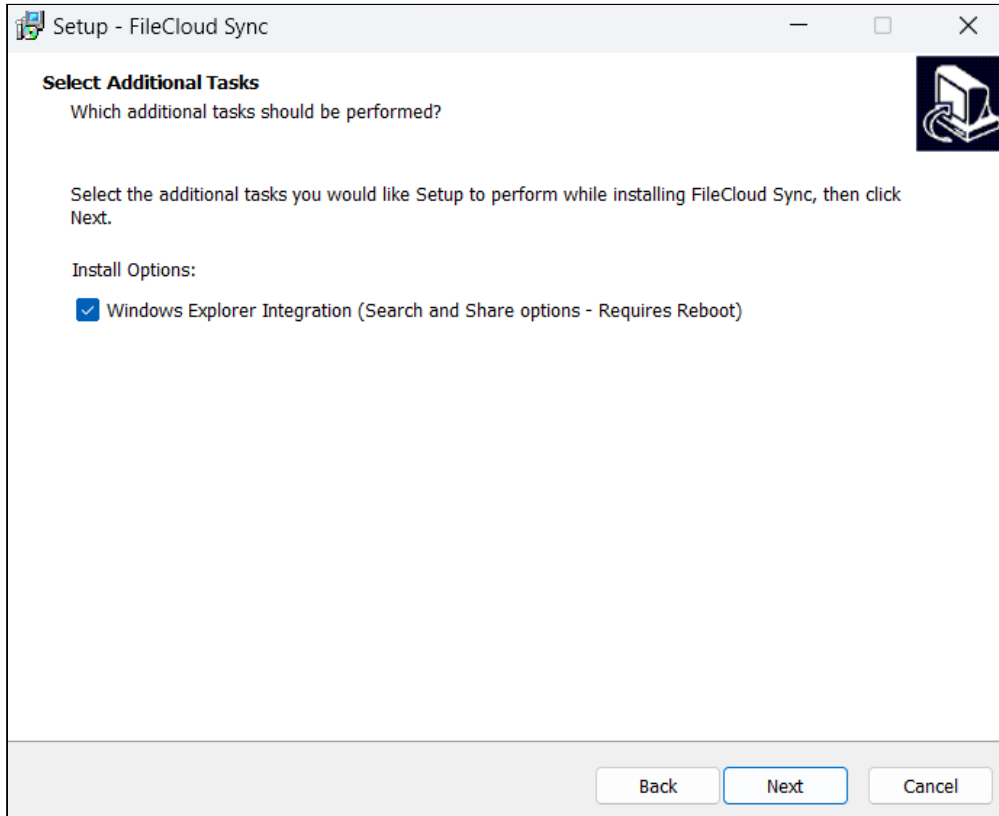
You must install FileCloud Sync before you can begin synchronizing documents on your local computer to the FileCloud Server site.

### To install Sync on Windows:

1. Download FileCloud Sync App from <https://www.filecloud.com/additional-downloads/#sync>

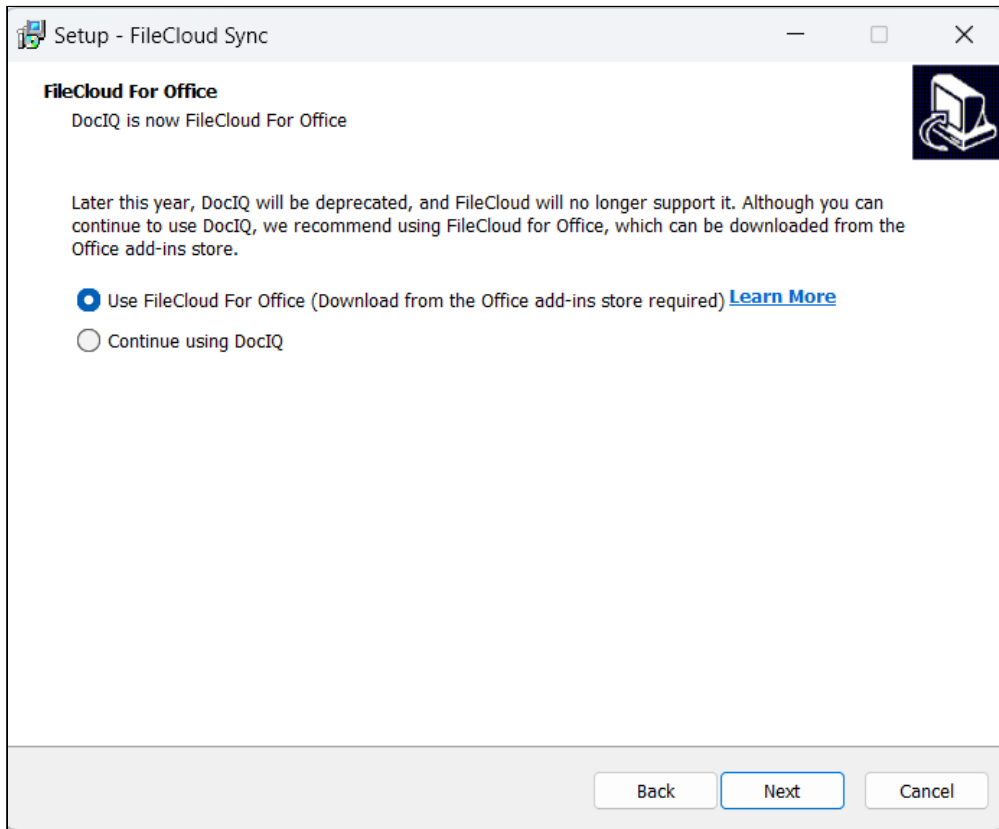
2. After successfully downloading the App, run the execution file FileCloudSync.exe.  
The first screen of the wizard currently gives you information about the new FileCloud for Office feature.



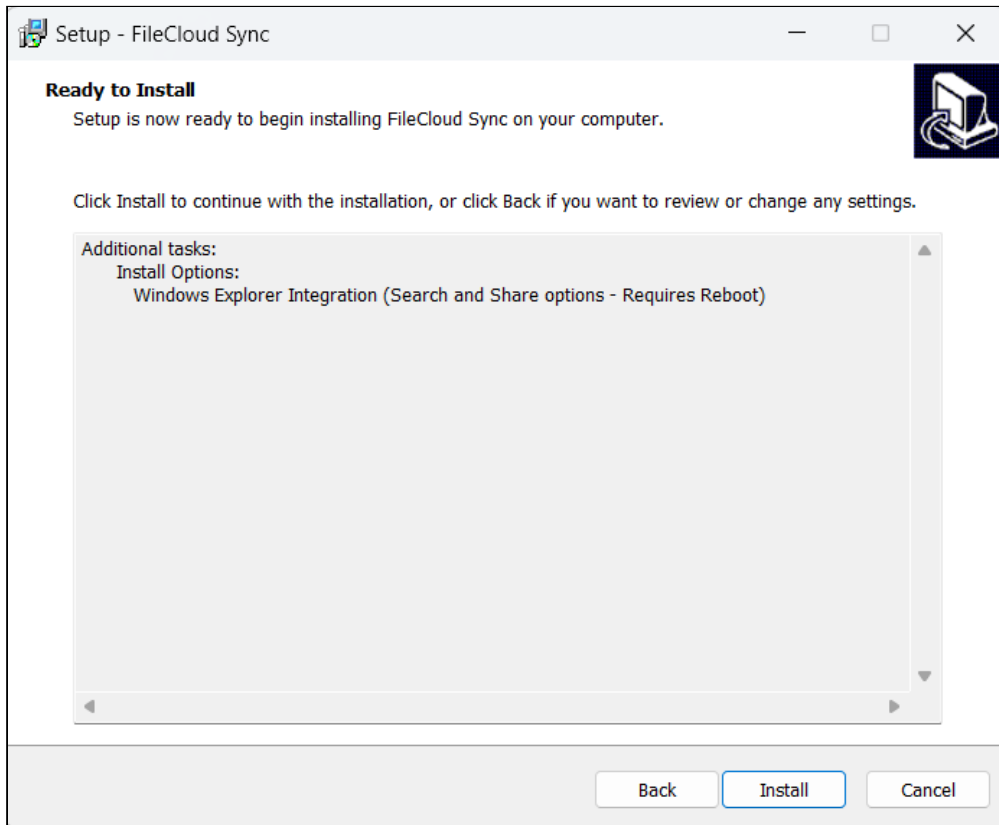
3. Click **Next**.4. Leave the checkbox checked, and click **Next**.

If you are already a Sync user using DocIQ, and this is an upgrade, the next screen gives you the option of using DocIQ or FileCloud for Office. For more information, see [Using FileCloud for Office with Sync](#). If you are a new Sync user, the following screen does not appear.

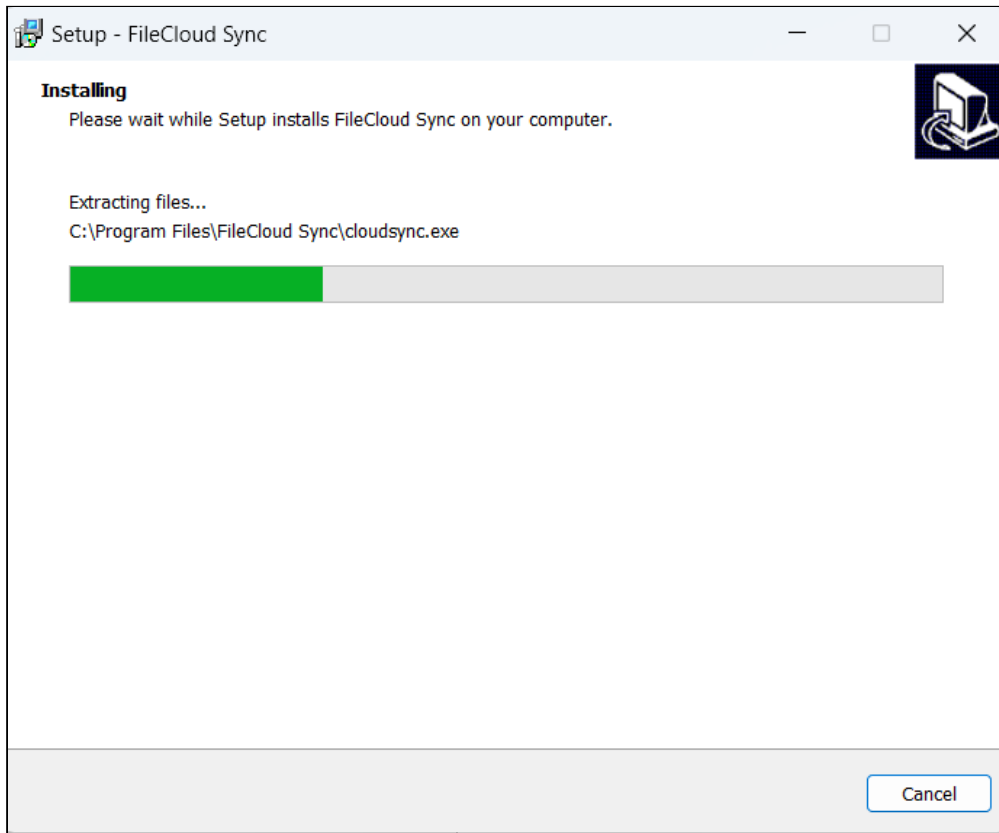




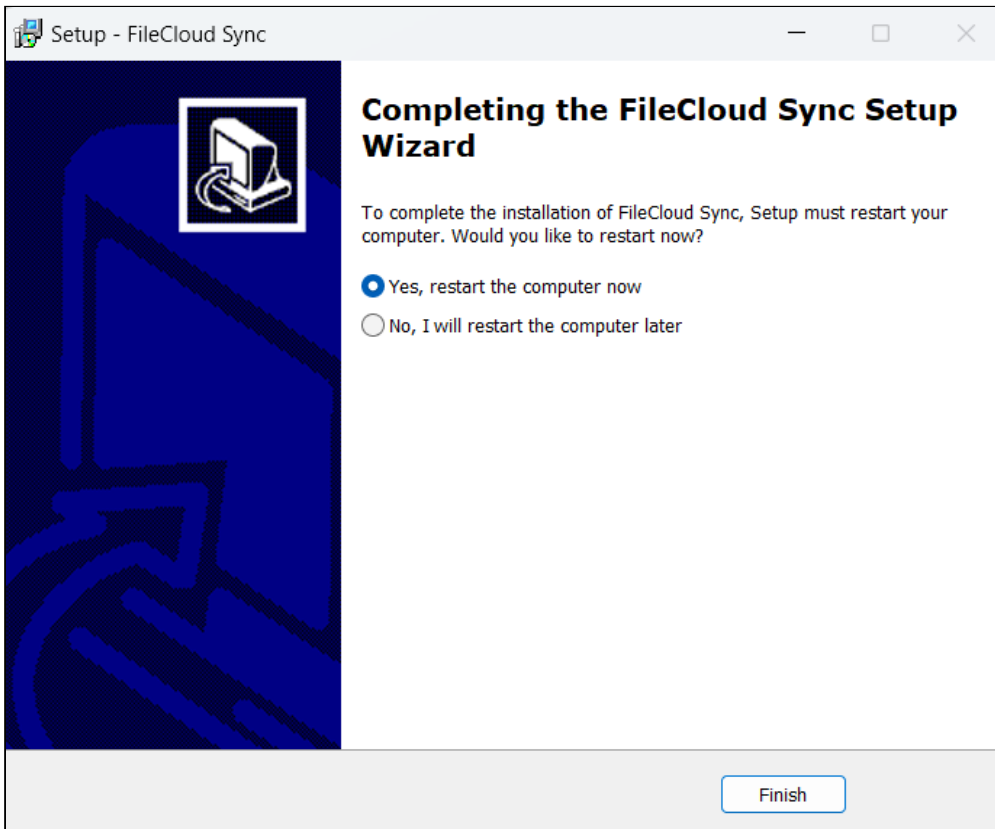
The next screen appears as in the following screenshot.



5. Click **Install**.  
The wizard shows the installation's progress.



When installation is complete, the following screen appears:



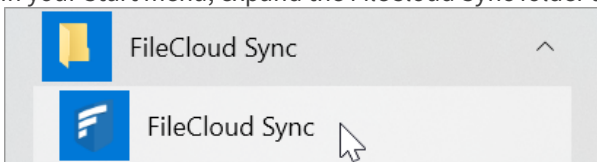
6. Leave **Yes, restart the computer now** selected to restart your computer and begin using Sync or the latest version of Sync, and click **Finish**.

## Start and Log In to Sync

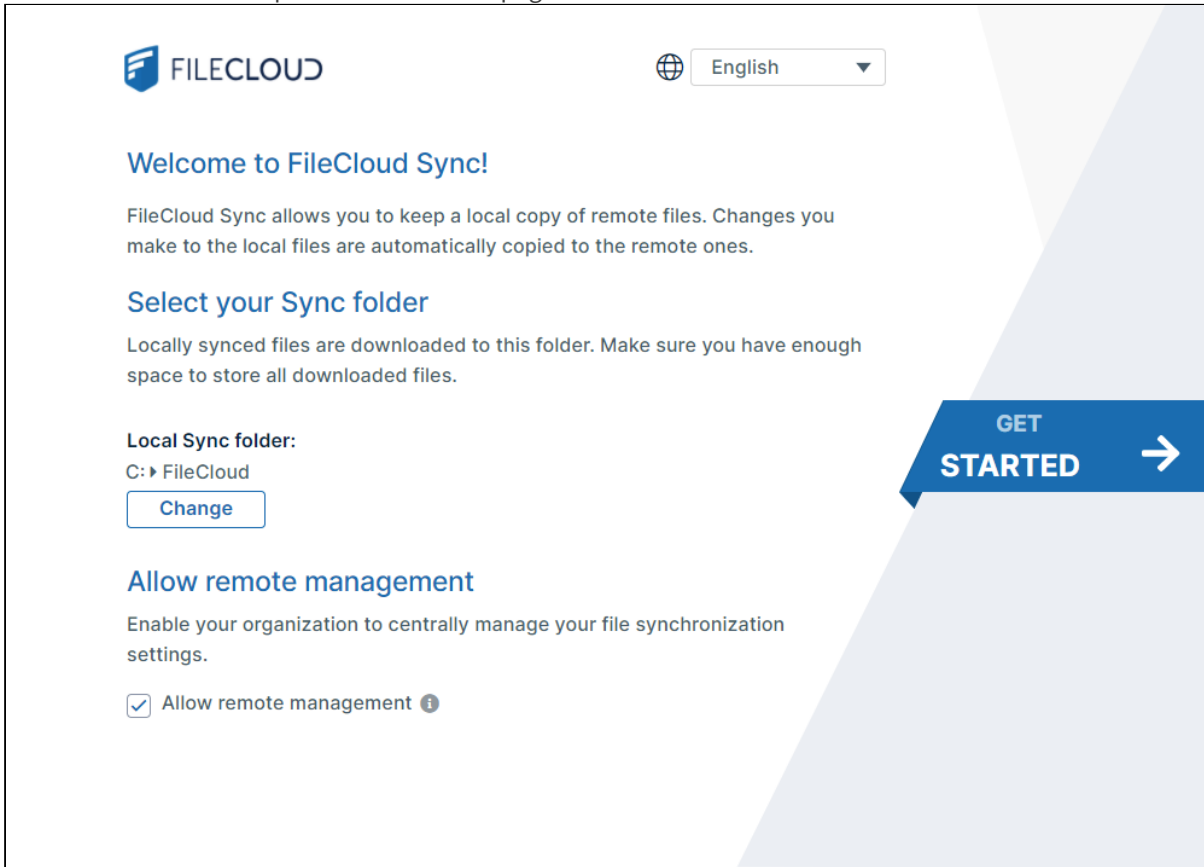
After you install Sync and restart your computer if necessary, you must provide your FileCloud account information to Sync.

### To start and log in to Sync:

1. In your Start menu, expand the FileCloud Sync folder and click the FileCloud Sync icon.



2. The Get Started wizard opens to its welcome page:



By default, the user interface language is English, the sync folder is your local FileCloud folder, and remote management is enabled.

3. Change the user interface language to the language you prefer; do not change the other settings unless instructed to by your administrator.
4. Click **Get Started**.  
The window for [Step 1 Log In](#), opens.

## Step 1 Log In

In the window for step 1, **Log In**, enter your credentials and log in to FileCloud Sync.

**1 LOGIN**      **2 CLOUD STORAGE**      **3 NETWORK FOLDERS**      **4 BACKUP FOLDERS**      **5 FINISH**

### Log in

Please enter your credentials. When you sign in to your account, your FileCloud Sync settings will automatically be configured.

**Login Method**      **Password**      **SSO**      **Device Authentication Code**

**Server URL**     

**Account**     

**Password**     

[Proxy Settings](#)      **Login**

1. For **Login Method**, leave the default of **Password**, or choose **SSO** or **Device Authentication Code**.
  - If you use **Password**:
    - i. In **FileCloud Sync Server URL**, type the address of your FileCloud server.
    - ii. In **Account** and **Password**, type in the credentials that were sent to you when your FileCloud account was created.
    - iii. Click **Log in**.

- If you choose **SSO (single sign-on)**, type the address to the FileCloud server that was sent to you when your FileCloud account was created.  
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**,
  - In **FileCloud Sync Server URL**, type the address of your FileCloud server.
  - In **Account**, type in the username that was sent to you when your FileCloud account was created.  
An **Enter Device Code** dialog box opens.

- Click **Open Website**.  
The log-in screen of the user portal opens.
- Log-in to the user portal.
- In the upper-right corner of the screen, click your username and choose **Settings**.
- In the **Settings** screen, click **Devices**.
- Next to the listing for Cloud Sync, click the check.

Device Name	Device Details	Last Login	Device Status	Actions
<input type="checkbox"/> Android-google-Pixel 2	OS: Android 10, App: 182	September 9th 2020 10:49AM	Needs Approval	✓ ✕
<input checked="" type="checkbox"/> Cloud Sync (DESKTOP-D2R3S88)	OS: Windows 10 10.0 (Build 18362), App: 20.1.0.3737	September 9th 2020 8:43AM	Needs Approval	✓ ✕

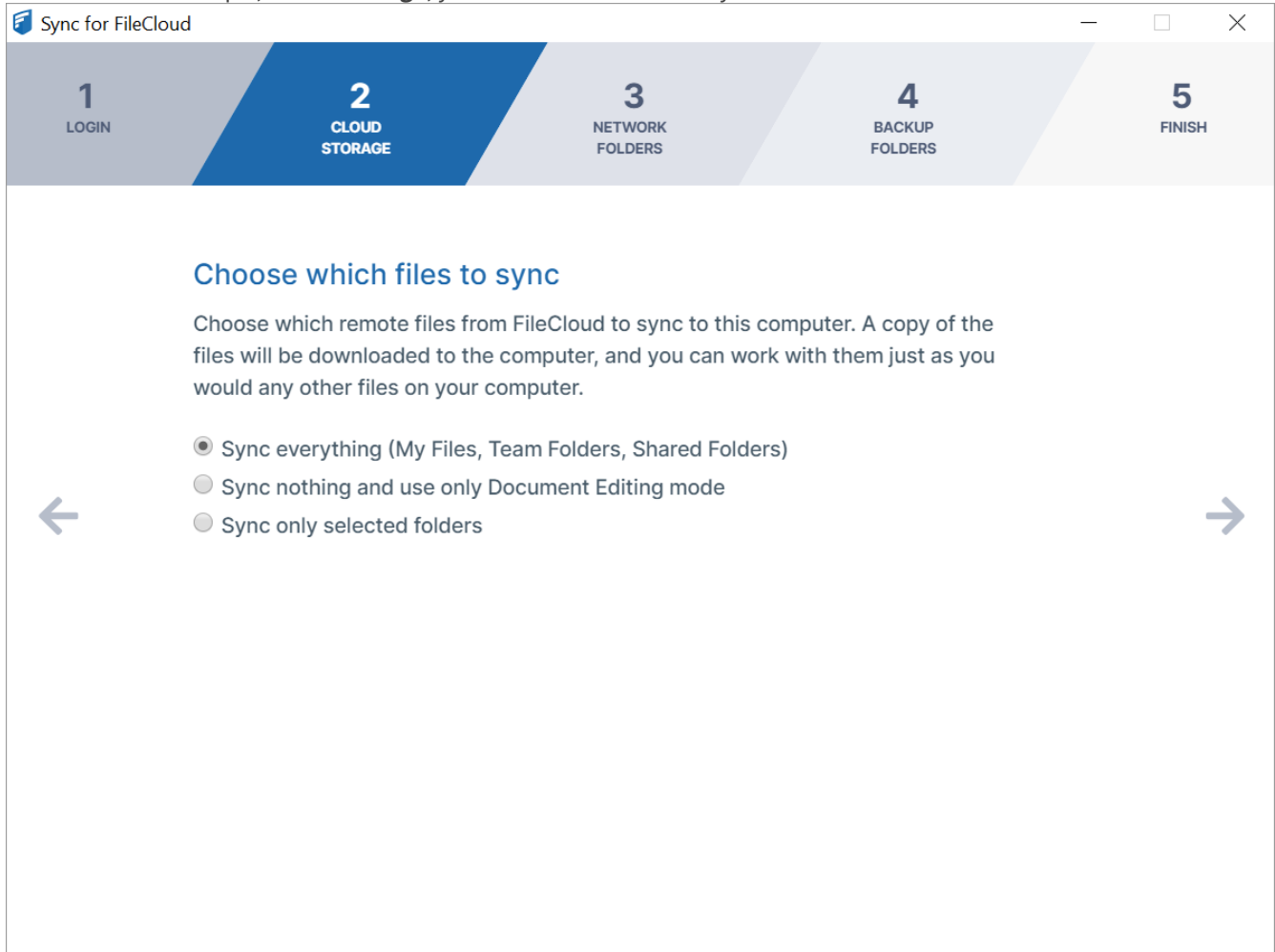
A dialog box with the device authentication code opens.

- Enter the authentication code into the **Enter Device Code** dialog box, and click **Submit**.
- Or enter Proxy settings.

The window for [Step 2, Cloud Storage](#) opens.

## Step 2 Choose which cloud folders to sync

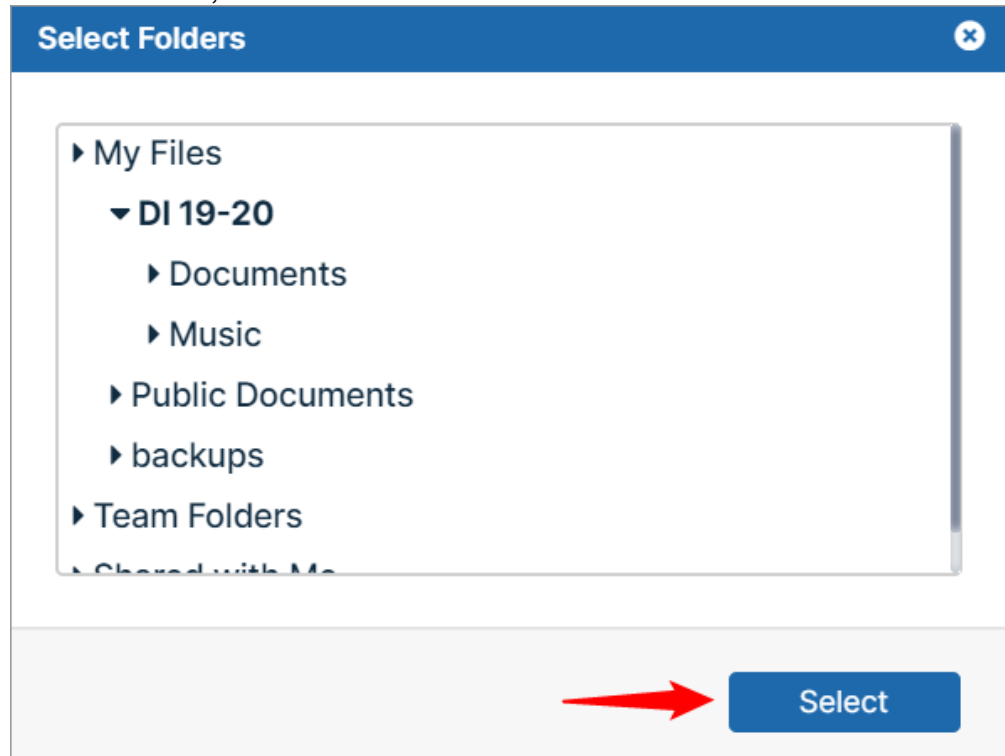
In the window for step 2, **Cloud Storage**, you choose which files to sync.



1. Choose:
  - **Sync Everything** to sync all of your FileCloud files and folders.
  - **Sync nothing and use only Document Editing mode** to use Sync to edit your FileCloud files from your desktop without syncing changes with FileCloud.
  - **Sync only selected folders** to choose which folders' content to sync. If you choose this option, you are prompted to choose the folders to sync.
    - i. Click **Add Folders**.  
The **Select Folders** dialog box opens.



- ii. For each folder that you want to sync, in **My Files**, **Team Folders**, or **Shared with Me**, navigate down to the folder, and choose **Select**.

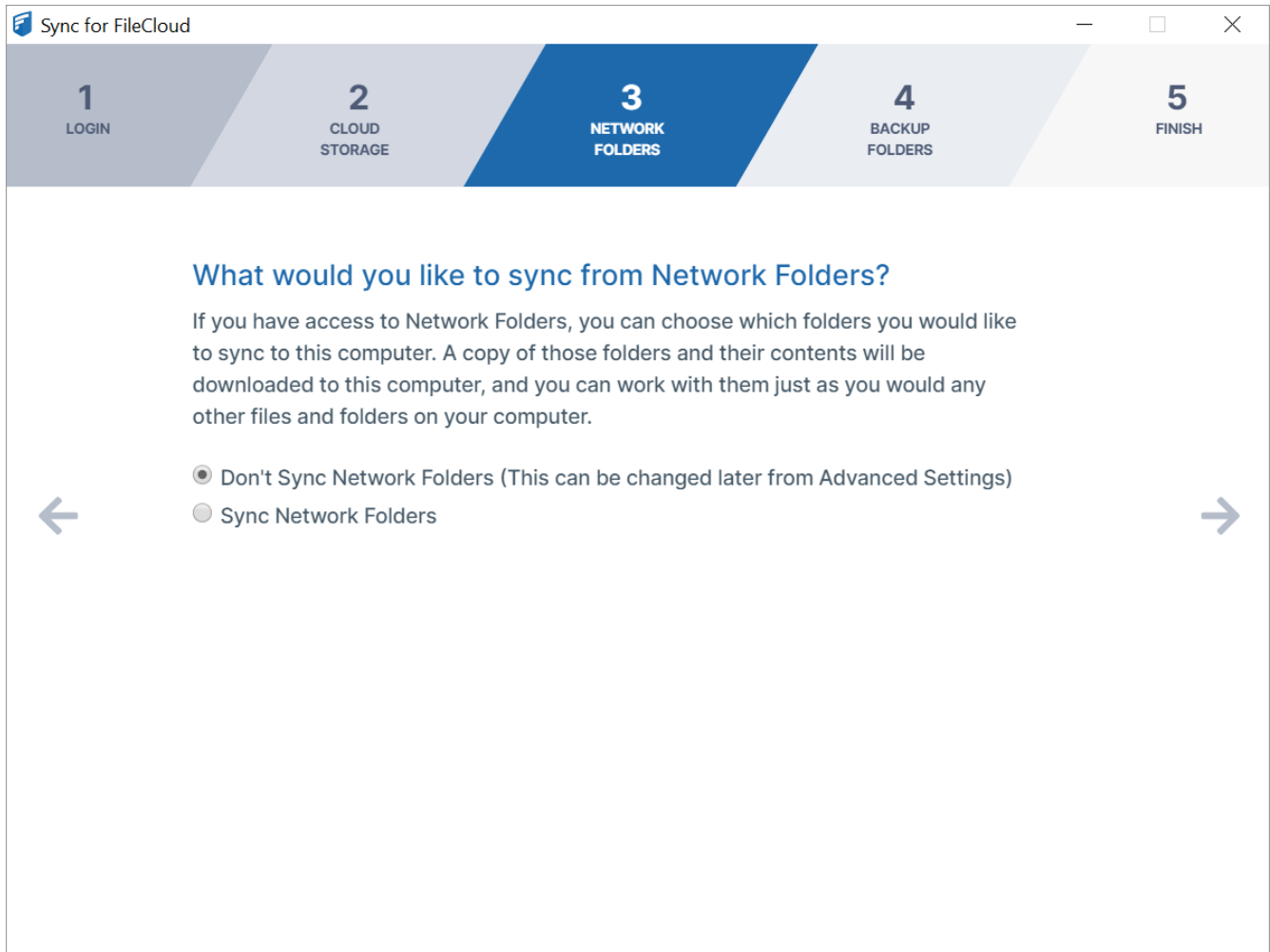


2. Click the right arrow to go to the window for [Step 3, Network Folders](#).

After installation, you can [change your sync options](#).

### Step 3 Sync Network Folders

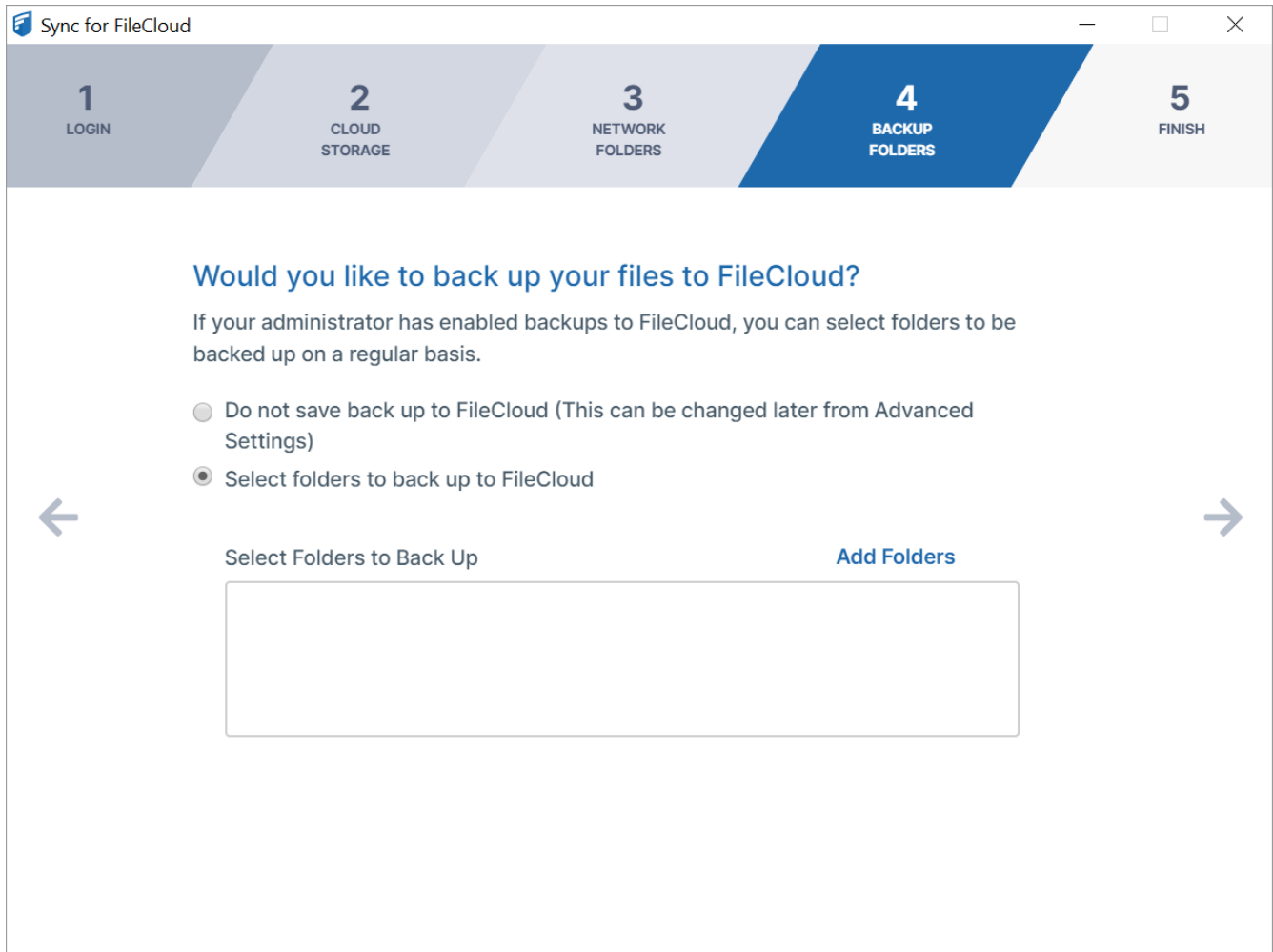
Since Network Folders are not a FileCloud Online feature; check **Don't Sync Network Folders**, and then click the arrow to go to [Step 4, Backup Folders](#).



## Step 4 Backup Folders

**i** If you see the message **Backup folders not enabled. This feature is not available, please contact your administrator**, you may continue to set up and log in to FileCloud Sync by clicking the right arrow in the screen.

The window for step 4, **Would you like to back up your folders to FileCloud?**, lets you choose which folders to back up on FileCloud.



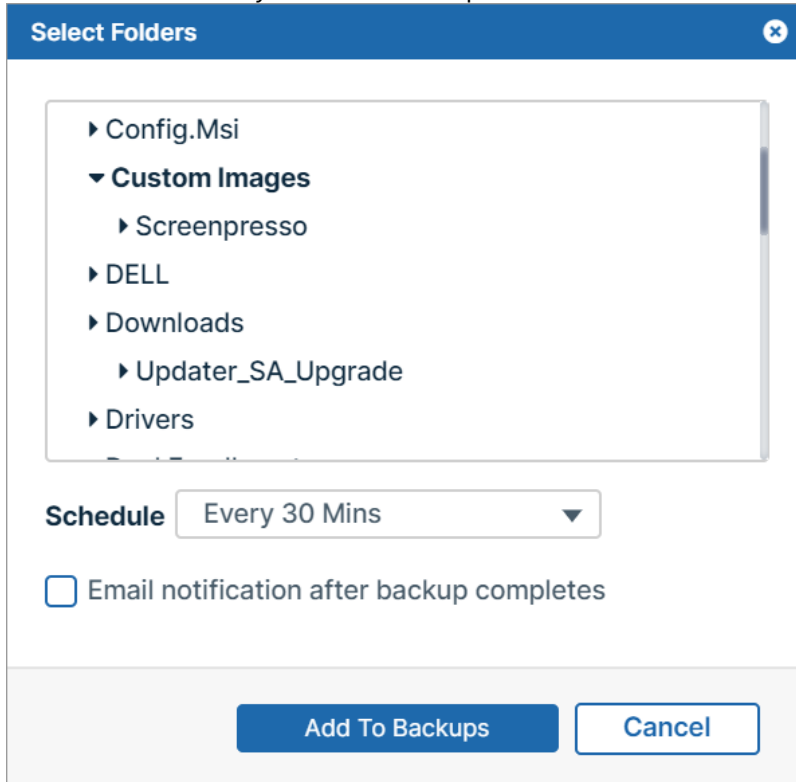
Choose one of the options:

- **Do not save additional backups on FileCloud (This can be changed later from Advanced Settings)**
- **Select folders to back up to FileCloud.**

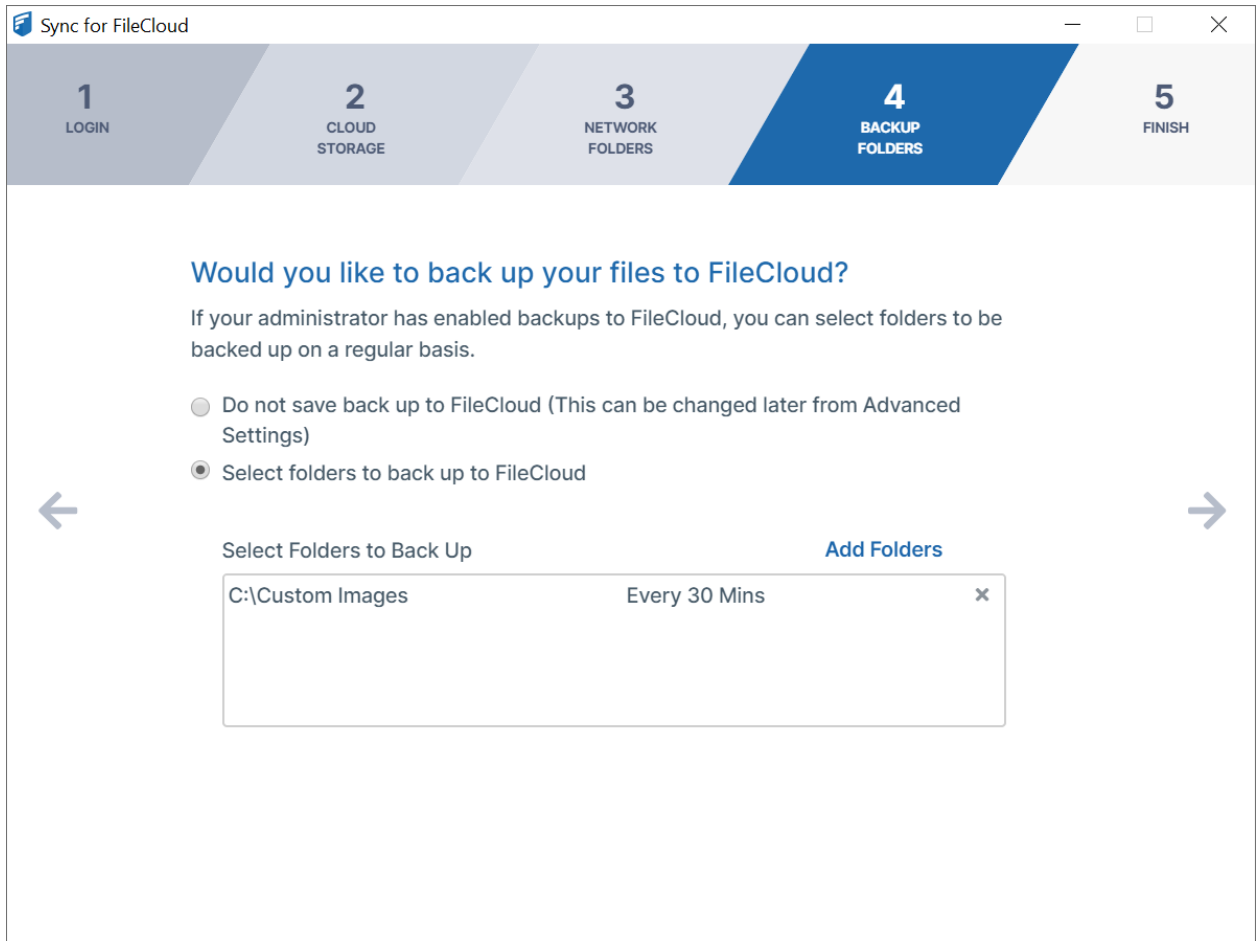
If you choose **Select folders to back up to FileCloud**, you are prompted to choose the folders to back up.

1. Click **Add Folders**.  
The **Select Directory** dialog box opens.

2. Choose the folder that you want to back up.



3. In **Schedule**, choose how often you want to back up the folder.
4. Check **Email notification after backup completes** if you want to be notified each time the folders in the directory are backed up.
5. Click **Add to Backups**.  
The **Select Directory** dialog box closes and the folder is added for backing up.

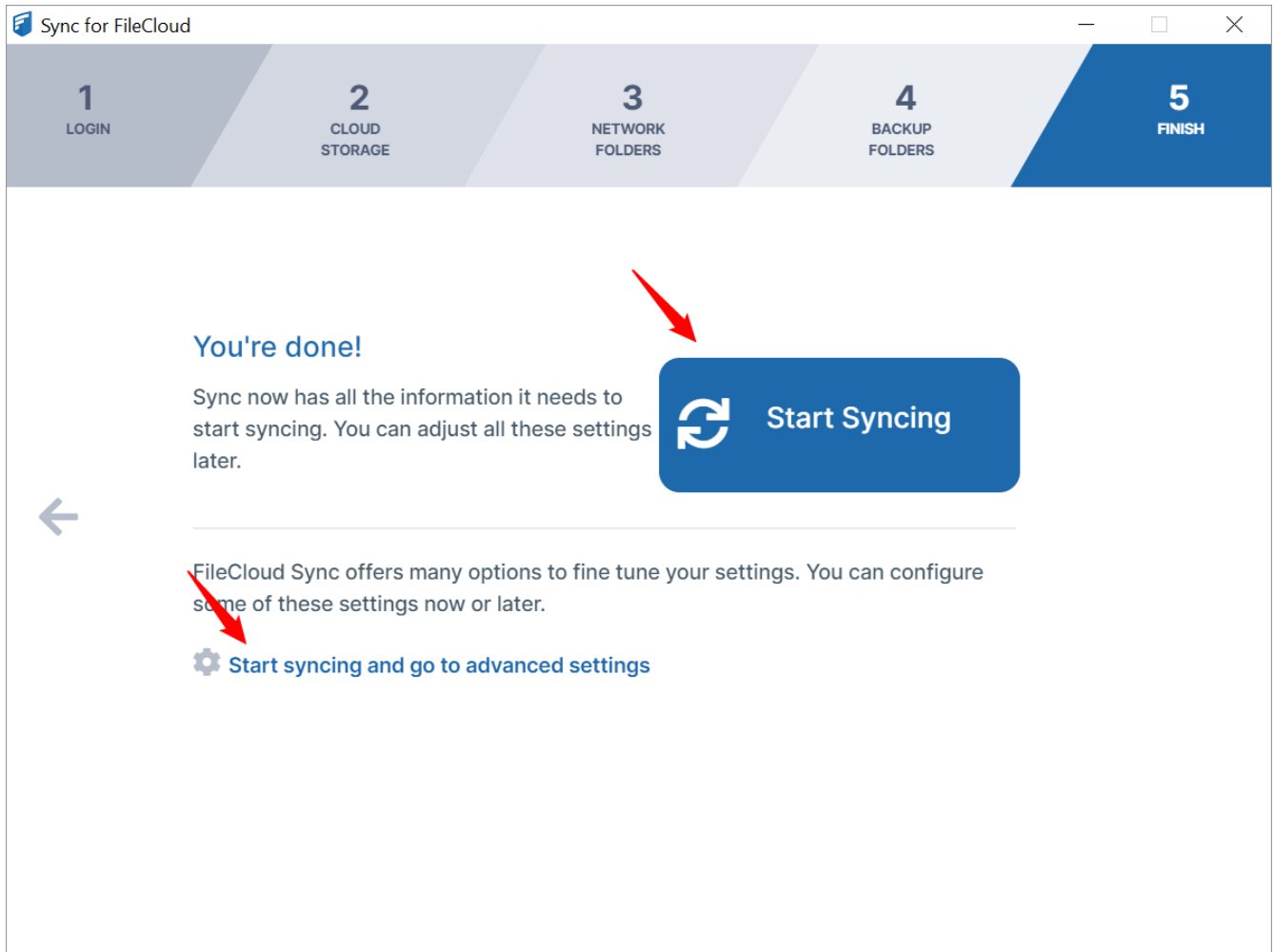


For information about editing settings for backing up folders, see [Backing Up Files](#).

Click the right arrow to go to [Step 5 Finish](#).

## Step 5 Start using Sync

The window for step 5, **Finish** lets you start syncing and go to advanced settings.



Click **Start syncing** to turn on Sync.

Click **Start syncing and go to advanced settings** to go to the [Settings](#) page of the Sync dashboard.

## Exiting or Resetting Sync

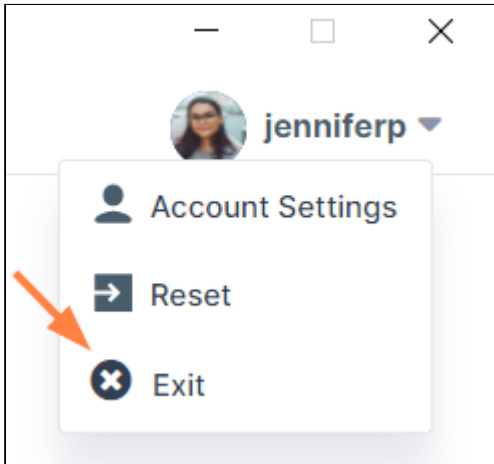
When you exit Sync, your session ends, but your username, password, and configuration settings are saved, so that when you re-open Sync, your settings are automatically filled in.

Resetting Sync removes your username, password, and configuration settings from Sync. When you reset, the login screen reappears, and you must newly enter your username and password and set up your Sync configuration.

You can exit Sync or reset Sync from the **Account Settings** option in the mini-dashboard or the main dashboard.

### To exit Sync

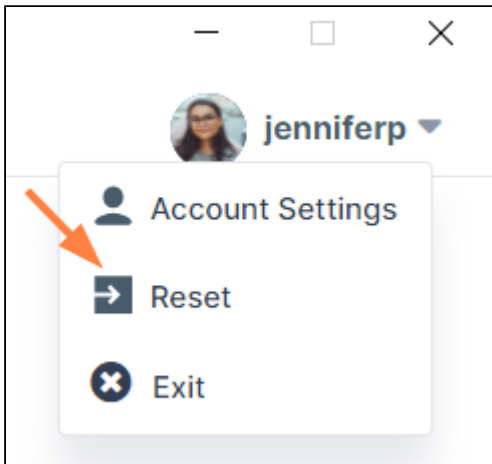
In the [mini-dashboard](#) or the [main dashboard](#), in the upper-right corner, click your username and choose **Exit**.



Sync closes, but when you reopen it, you are automatically logged in and your configuration settings are applied.

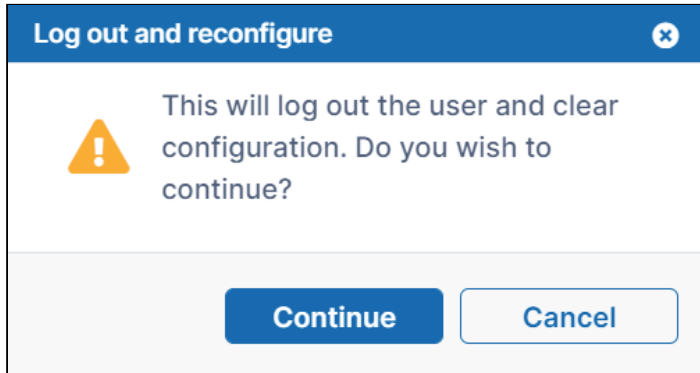
### To reset Sync

1. In the [mini-dashboard](#) or the [main dashboard](#), in the upper-right corner, click your username and choose **Reset**.



The following confirmation dialog box opens. It alerts you that you will be logged out and your settings will be

cleared.



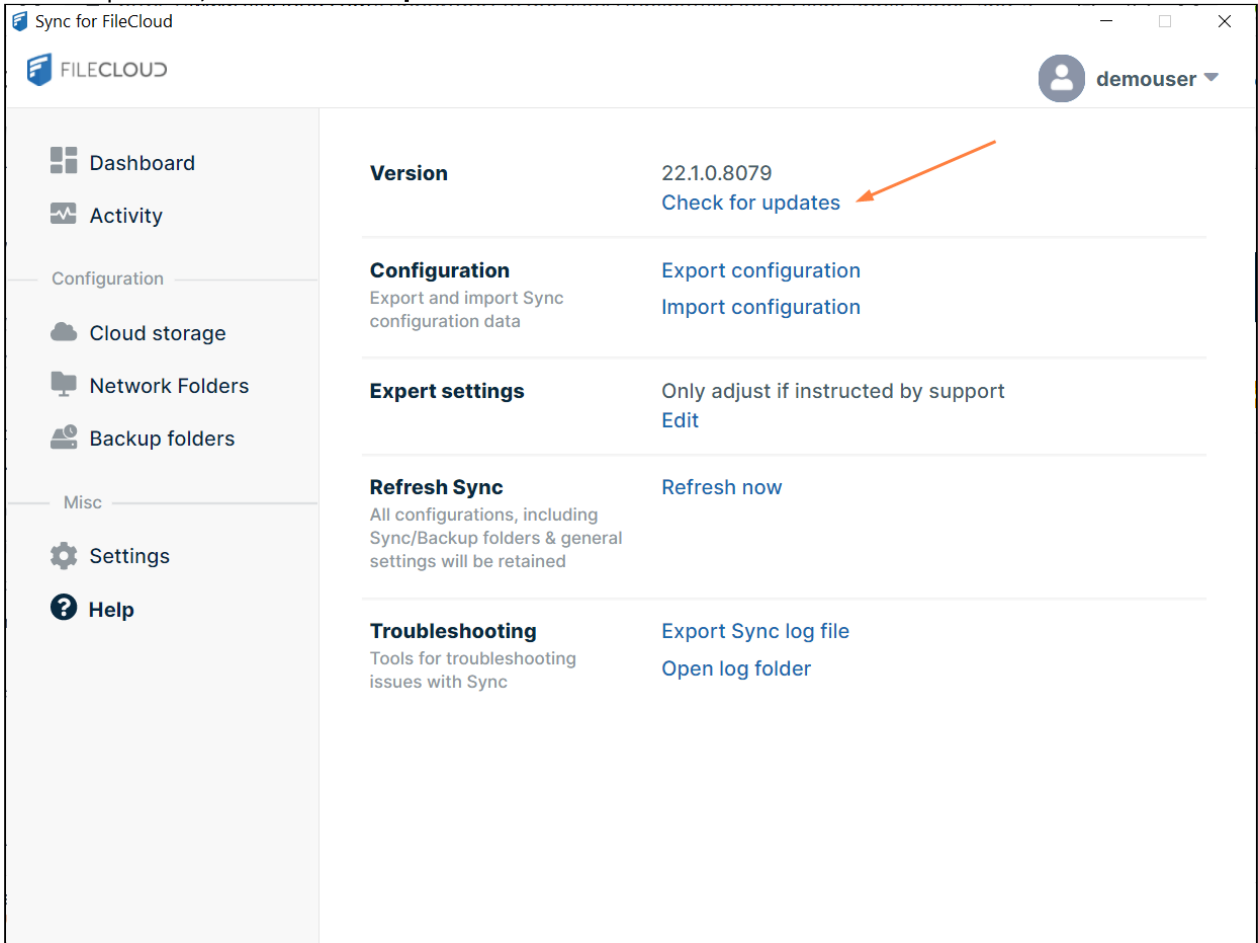
2. Click **Continue**.  
You are logged out of Sync and all of your settings are removed.  
The [Get Started](#) page opens.  
In addition to entering your username and password, you are required set up sync folders and sync schedules again.

## Checking for Updates to Sync

### To check if there are updated versions of Sync:

1. To open the mini-dashboard, In your system tray, right-click on the Sync icon and choose **Open**.
2. To open the main dashboard, In the mini-dashboard, click **Dashboard**.
3. In the navigation panel, click **Help**.



4. In the Help screen, click **Check for Updates**.

If there are updates to install, you are redirected to the installation link.

If you have the latest version installed, the following message appears at the bottom of the screen:



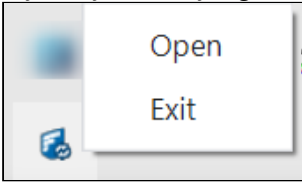
## Opening and Using Sync Dashboards

Once Sync is installed and running, you can work in the Sync folders in file explorer, and perform Sync operations in its mini-dashboard and main dashboard.

The mini-dashboard was made to give you a small interface that stays out of your way as you work, but enables you to run Sync operations and provides you with the information you need about your data and Sync operations. The main dashboard enables you to fully configure your Sync application as well as run Sync operations and view Sync logs.

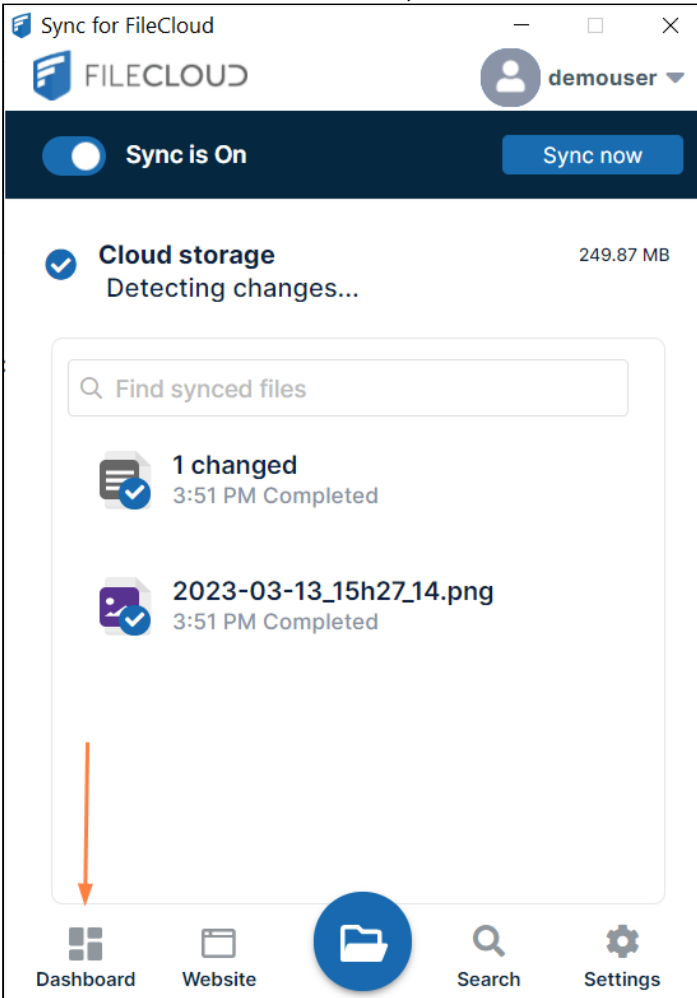
Each time you open Sync, the mini-dashboard opens. From the mini-dashboard, you can access the main dashboard.

1. In your system tray, right-click the Sync icon, and choose **Open**.

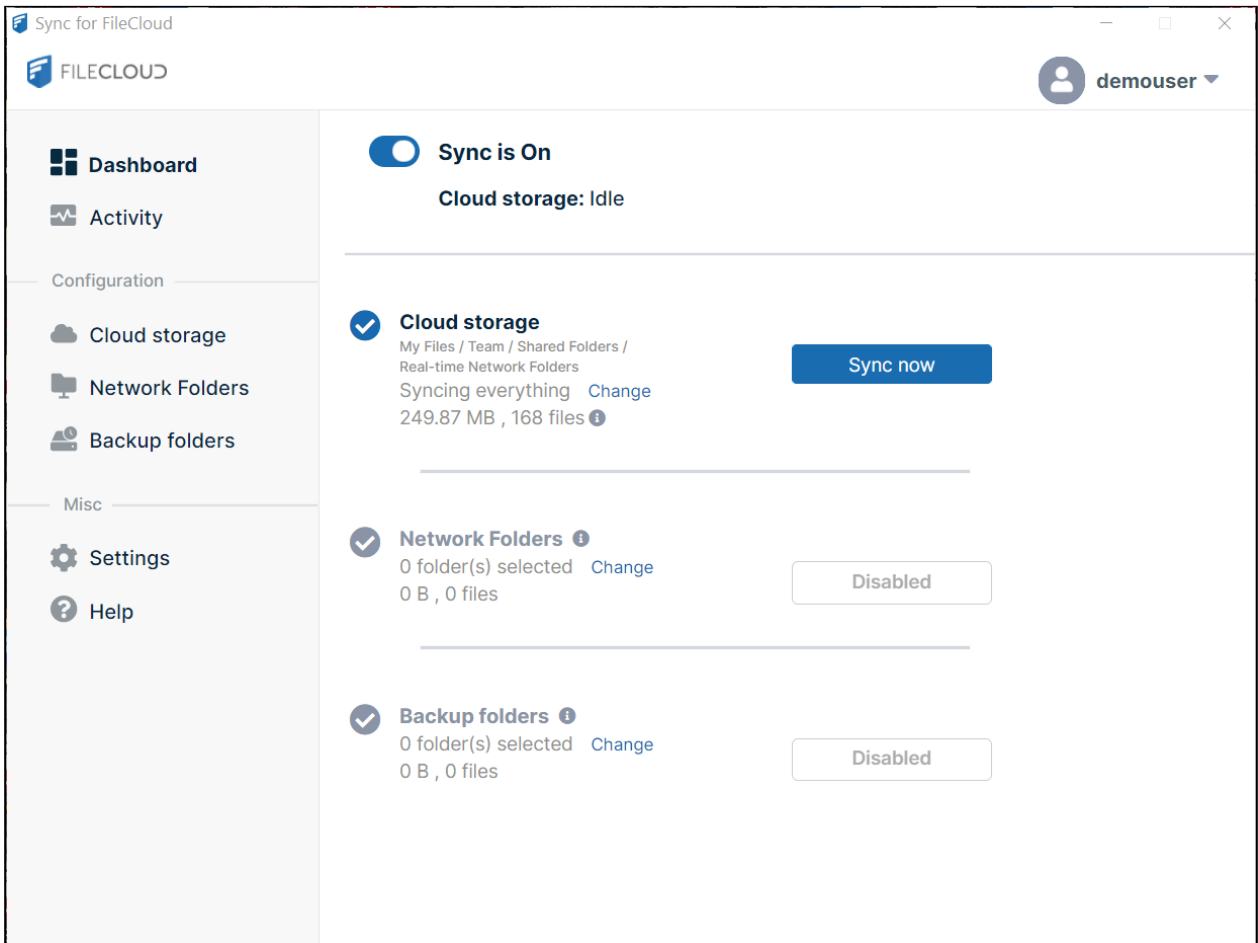


The mini-dashboard opens.

2. At the bottom of the mini-dashboard, click **Dashboard**.



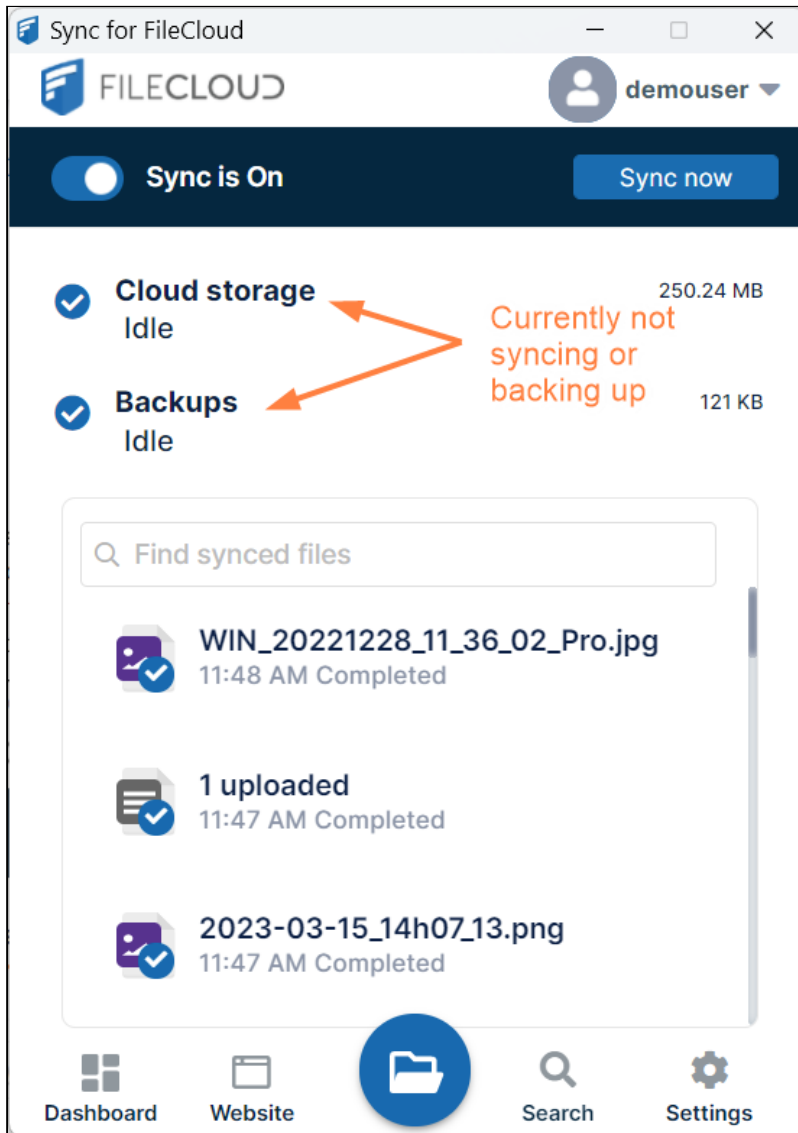
The main dashboard opens:



## Working in the Mini-Dashboard

In the mini-dashboard, you can view Sync information, enable and disable the application, and run Sync manually.

- The **Cloud Storage** icon appears checked if syncing is enabled for it or with a warning sign if there are any file syncing errors.
- If enabled but not syncing, Cloud Storage displays **idle**.
- In the center of the mini-dashboard is a list showing data from the most recent sync. The number of conflicts (if any) is displayed at the top of the list, and synced files and folders are displayed below it.

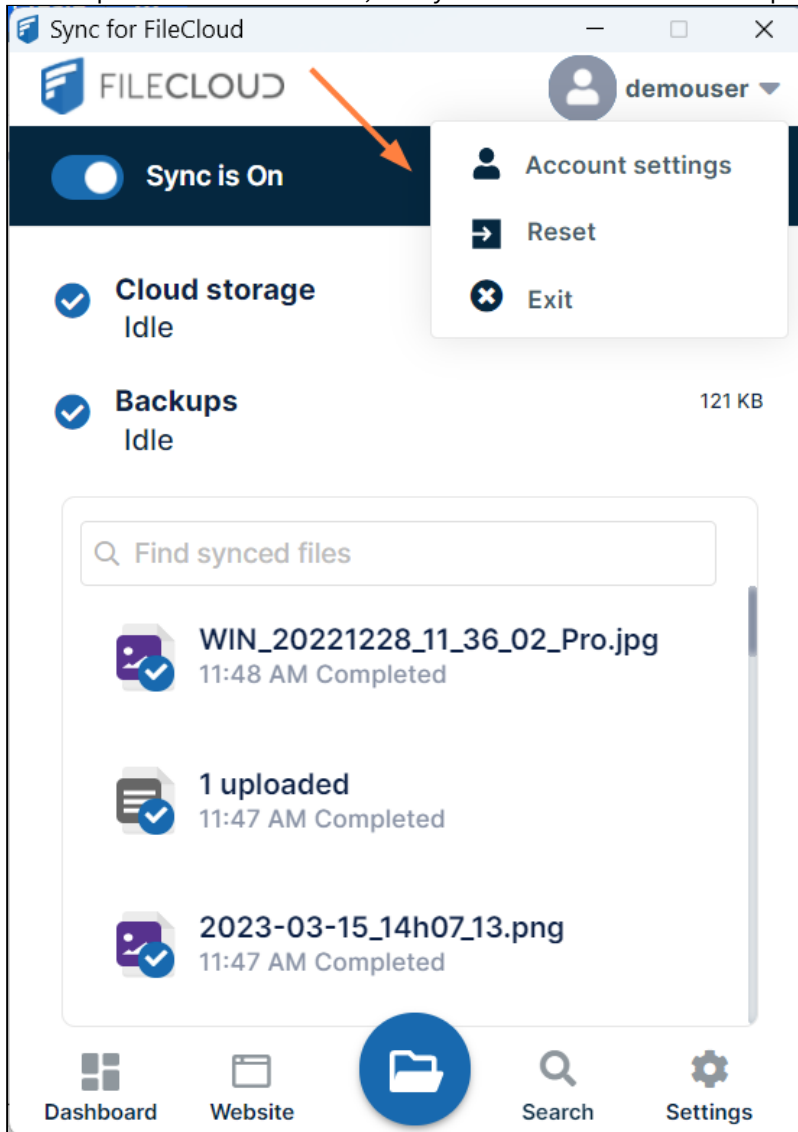


- The mini-dashboard displays a row of icons that you can click to perform actions or go to other locations in the Sync interface

Icon	Action
Dashboard	Opens the main dashboard
Website	<a href="#">Opens FileCloud user portal.</a> You can also open the FileCloud user portal by right-clicking your username in the mini-dashboard or main dashboard and clicking <b>Account Settings</b> . In the <b>Account Settings</b> screen, click the link to the server URL.

Icon	Action
Search	Opens Sync search
Settings	Opens the Settings page of the main dashboard.

- At the top of the mini-dashboard, click your username to access the options **Account Settings**, **Reset**, and **Exit**.



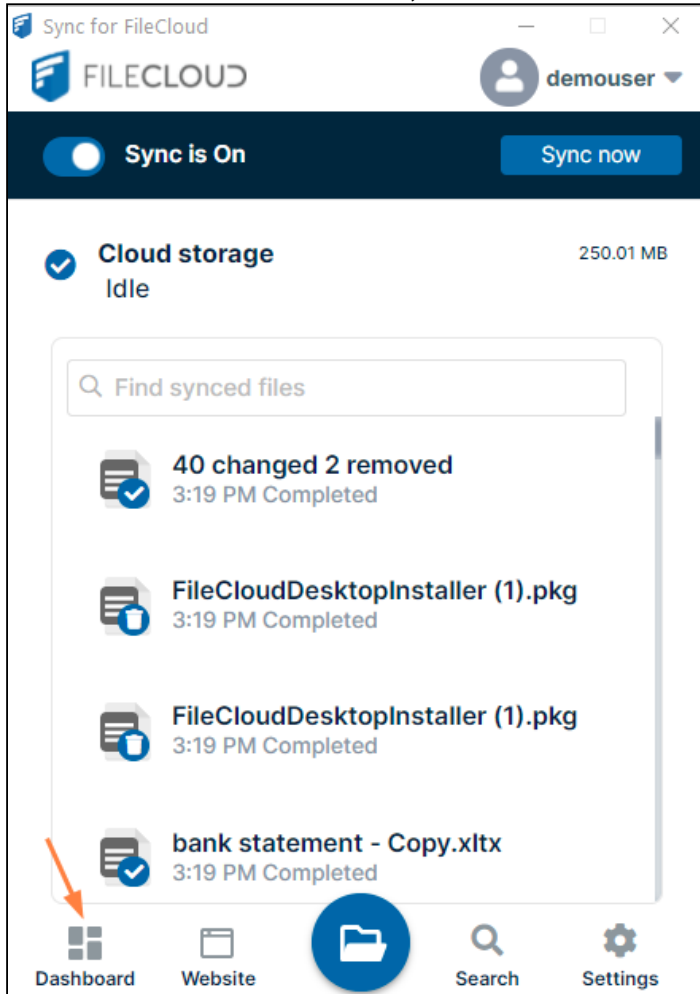
- Click **Account Settings** to go to the **Account Settings** page of the main dashboard
- Click **Reset** to clear your settings.
- Click **Exit** to log out of Sync, but save your settings.

## Working in the Main Dashboard

You can sync files and folders, change settings, and review information in the main dashboard.

### To access the main dashboard:

1. In the system tray, right click on the Sync icon, and choose **Open**. Sync's mini-dashboard opens.
2. At the bottom of the mini-dashboard, click the **Dashboard** icon.



The main dashboard opens. It has several screens, which are listed in the left navigation pane. Click the name of a screen to open it.

The screenshot displays the 'Sync for FileCloud' application window. The title bar shows the application name and standard window controls. The interface includes a top navigation bar with the FileCloud logo and a user profile for 'demouser'. A left-hand navigation pane is titled 'Main dashboard, navigation pane' and contains sections for 'Dashboard', 'Activity', 'Configuration', and 'Misc'. Under 'Configuration', there are links for 'Cloud storage', 'Network Folders', and 'Backup folders'. Under 'Misc', there are links for 'Settings' and 'Help'. The main content area shows the 'Sync is On' status with a toggle switch. Below this, the 'Cloud storage' section is active, showing 'My Files / Team / Shared Folders / Real-time Network Folders' and 'Syncing everything' with a 'Sync now' button. The 'Network Folders' and 'Backup folders' sections are both disabled, each showing '0 folder(s) selected' and '0 B, 0 files'.

Sync for FileCloud

FILECLOUD demouser

Main dashboard, navigation pane

- Dashboard
- Activity
- Configuration
  - Cloud storage
  - Network Folders
  - Backup folders
- Misc
  - Settings
  - Help

Sync is On

Cloud storage: Idle

Cloud storage

My Files / Team / Shared Folders / Real-time Network Folders

Syncing everything [Change](#)

250.01 MB , 172 files ⓘ

Sync now

Network Folders ⓘ

0 folder(s) selected [Change](#)

0 B , 0 files

Disabled

Backup folders ⓘ

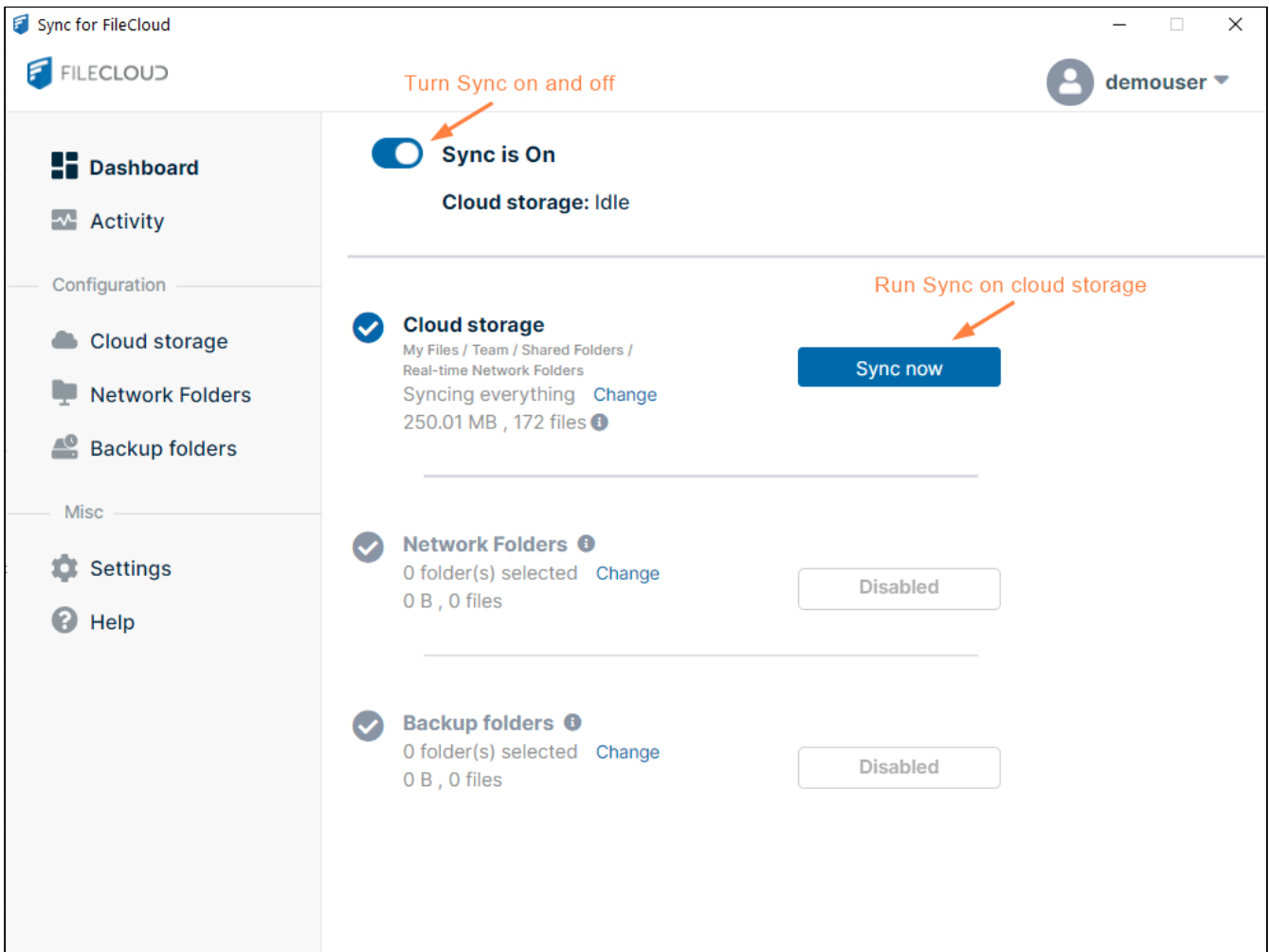
0 folder(s) selected [Change](#)

0 B , 0 files

Disabled

### Dashboard screen

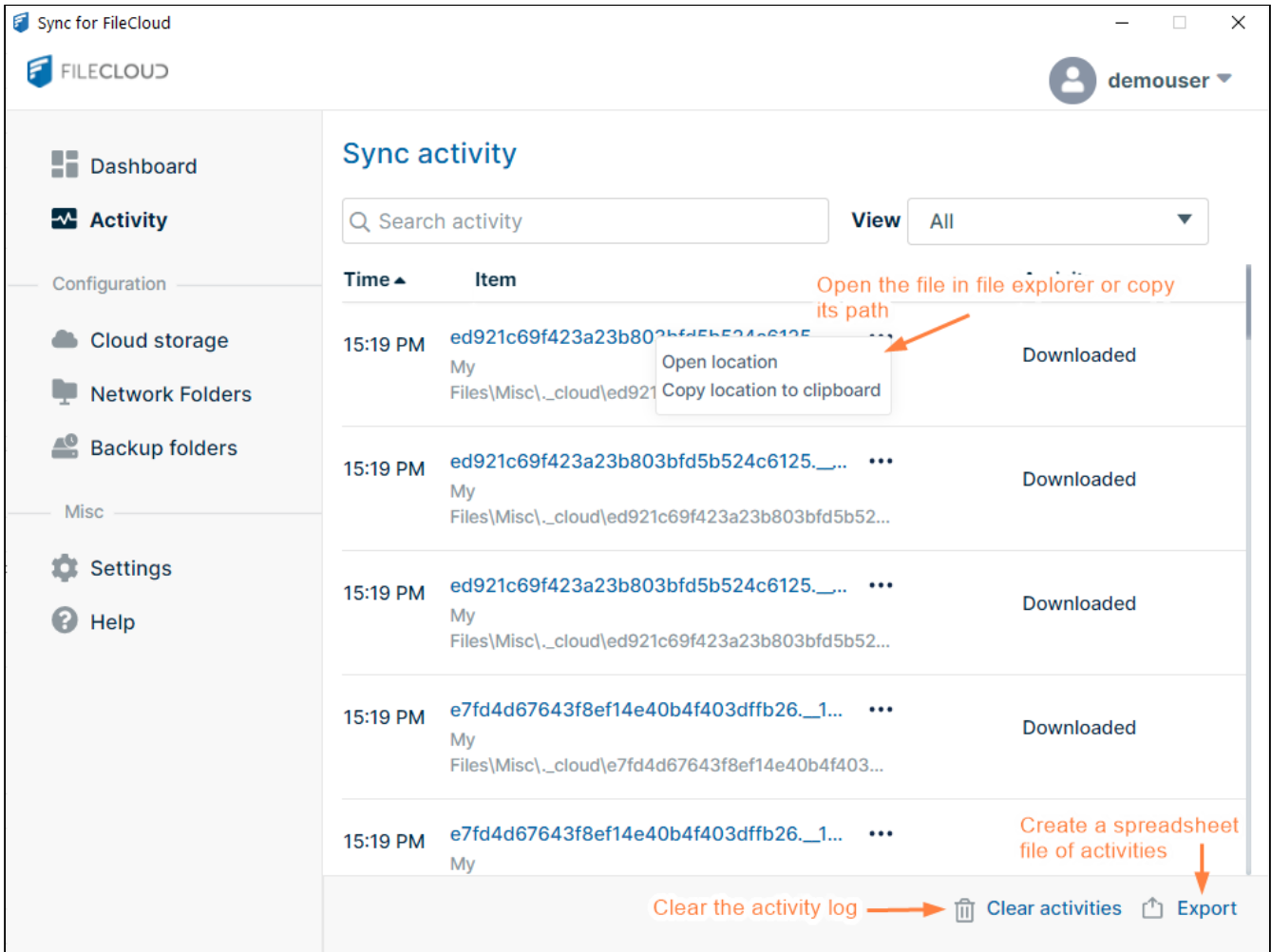
The **Dashboard** screen is the first screen that opens in the main dashboard. It displays Sync information and lets you turn Sync on and off as well as run Sync manually.





### Activity screen

In the **Activity** screen, you can view the content of log files, and open files in file explorer. For more information about the **Activity** screen, see [View or Clear Log Messages in Sync](#).



## Cloud Storage screen

The **Cloud storage** screen enables you to view and change your Sync settings for FileCloud content in **My Files**, **Team Folders**, and **Shared with Me**.

For more information, see [Cloud Storage: Selective Folder Sync](#).

Sync for FileCloud

FILECLOUD demouser

### Cloud storage

Choose which remote files from FileCloud Sync to sync to this computer. A copy of the files will be downloaded to the computer, and you can work with them just as you would any other files on your computer.

Sync everything (My Files, Team Folders, Shared Folders)

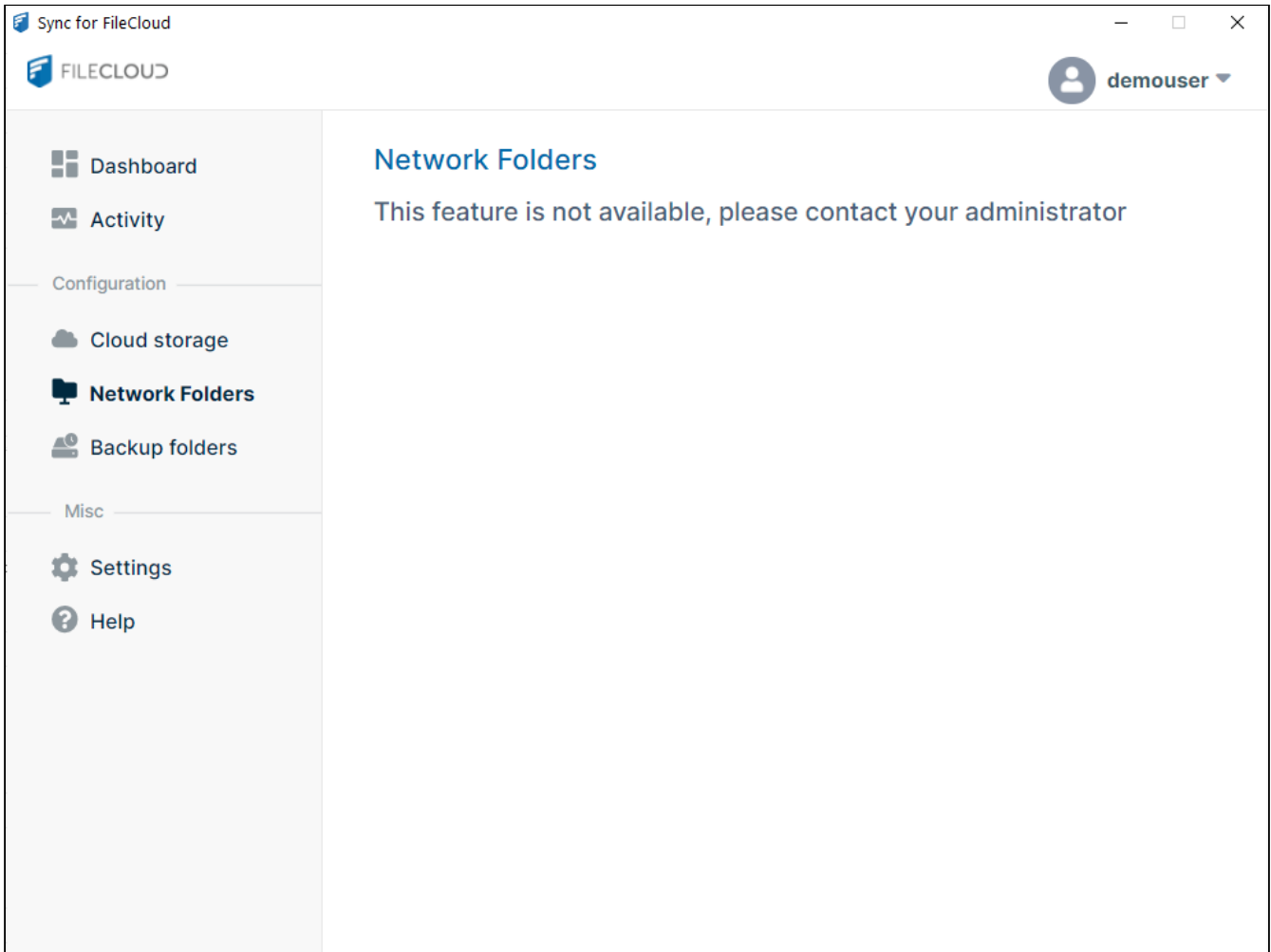
Sync only selected folders

Select the remote folders to sync to this computer [Add folders](#)

/demouser/DI 19-20	0 B	x
/demouser/Product Offerings	0 B	x

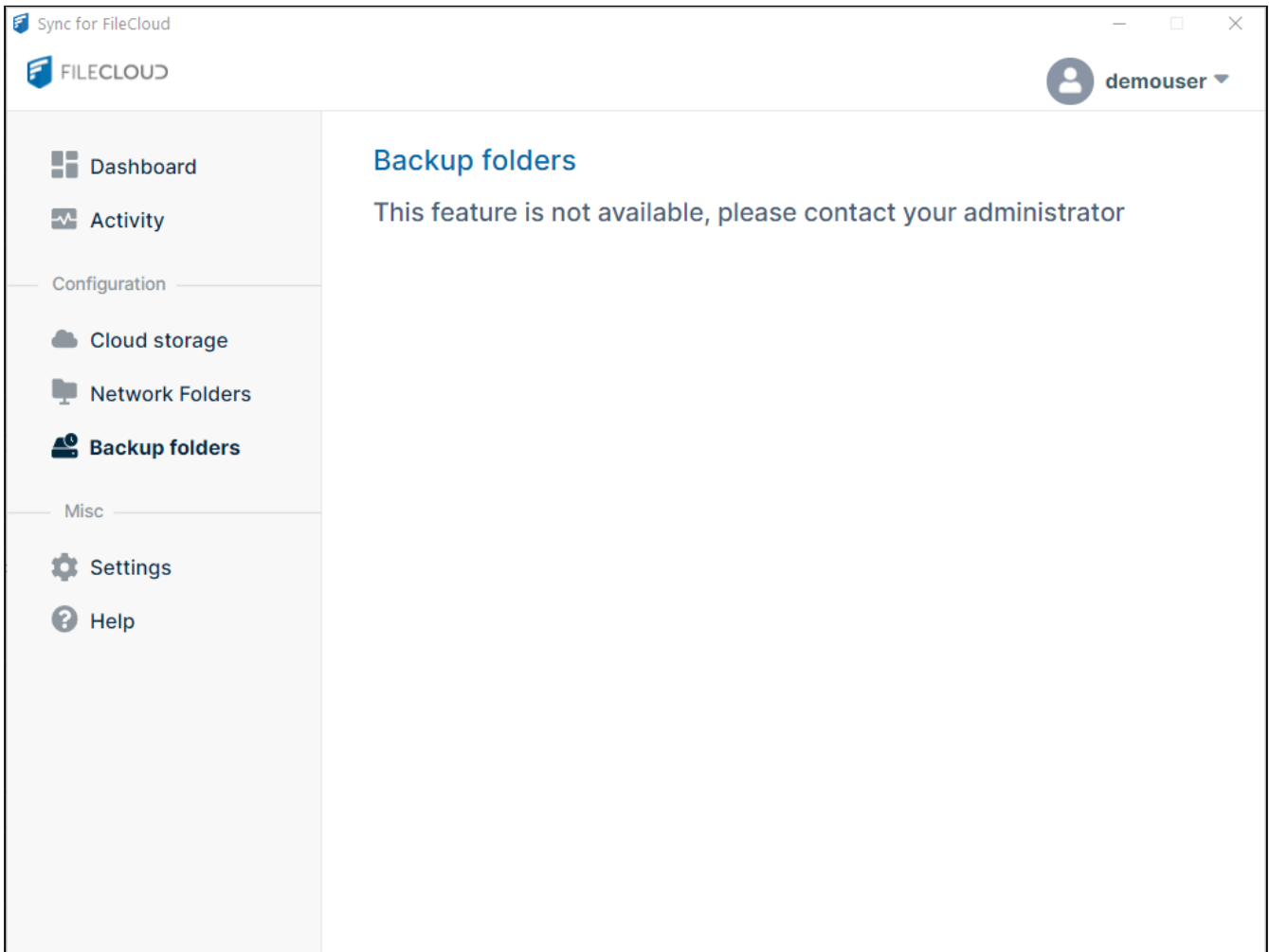
## Network Folders screen

Most FileCloud Online users do not have access to **Network Folders** and see the following message on the **Network Folders** screen:



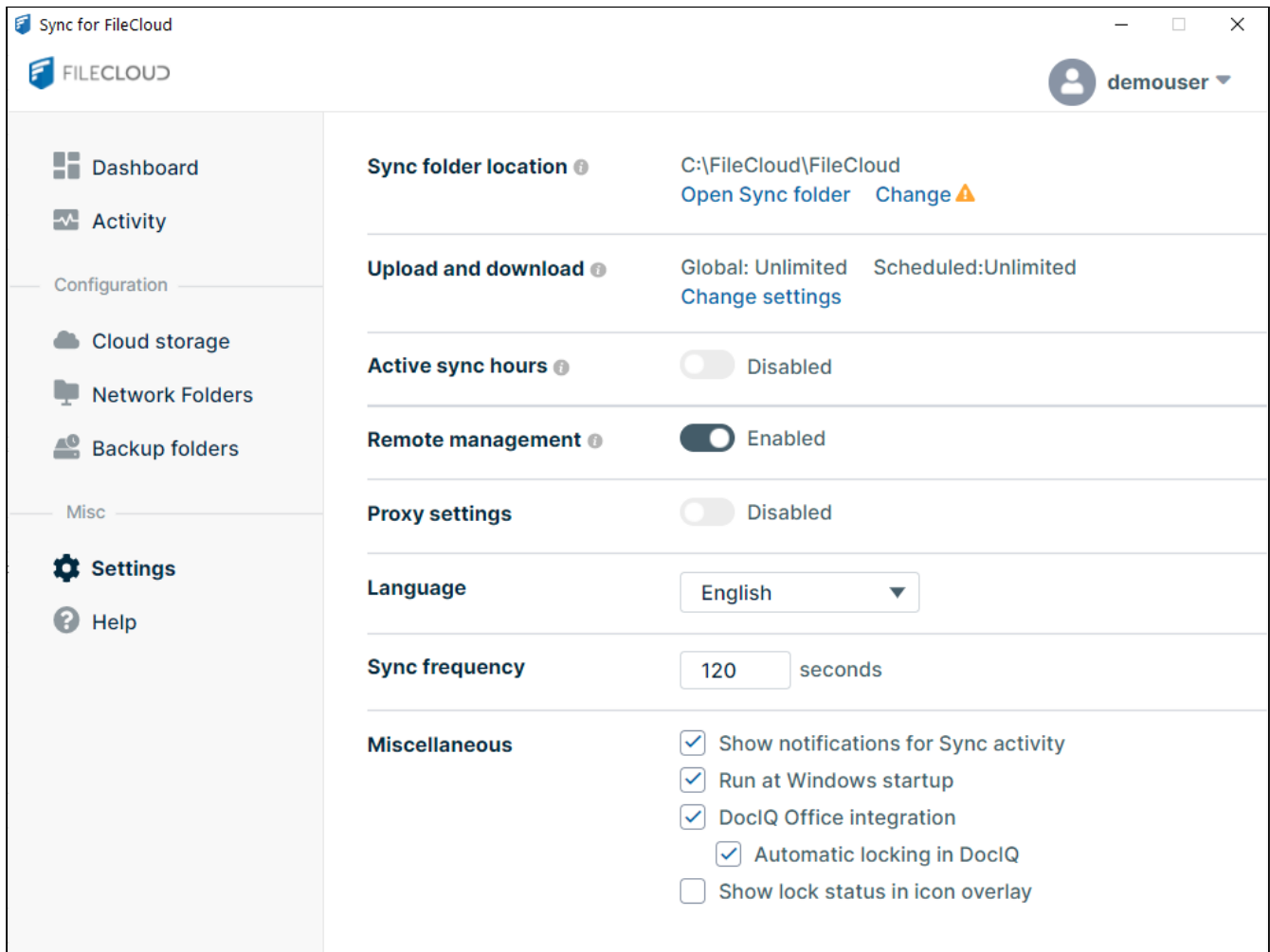
## Backup folders screen

Most FileCloud Online users do not have access to the backup function in Sync and see the following message on the **Backup folders** screen:



## Settings screen

The **Settings** screen lets you view and change Sync settings.  
For more information, see [Sync Settings](#).



Sync for FileCloud

FILECLOUD demouser

- Dashboard
- Activity
- Configuration
- Cloud storage
- Network Folders
- Backup folders
- Misc
- Settings**
- Help

**Sync folder location** ⓘ C:\FileCloud\FileCloud  
[Open Sync folder](#) [Change](#) ⚠

**Upload and download** ⓘ Global: Unlimited Scheduled: Unlimited  
[Change settings](#)

**Active sync hours** ⓘ  Disabled

**Remote management** ⓘ  Enabled

**Proxy settings**  Disabled

**Language** English ▼

**Sync frequency**  seconds

**Miscellaneous**

- Show notifications for Sync activity
- Run at Windows startup
- DocIQ Office integration
  - Automatic locking in DocIQ
  - Show lock status in icon overlay

## Help screen

The **Help** screen lets you view log files, import and export Sync configuration, and check for Sync updates. For more information, see [Sync Logs](#).

The screenshot shows the 'Sync for FileCloud' application window. The title bar reads 'Sync for FileCloud' and the user profile is 'jenniferp'. The left sidebar contains navigation options: Dashboard, Activity, Configuration, Cloud storage, Network Folders, Backup folders, Misc, Settings, and Help. The main content area displays the following information:

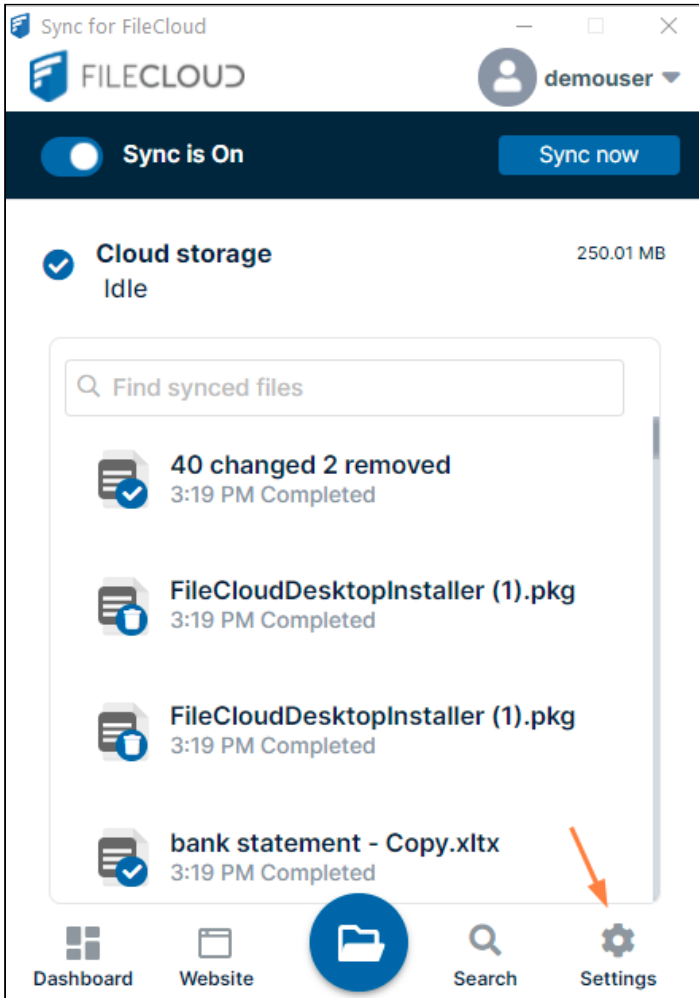
<b>Version</b>	23.1.0.8491 <a href="#">Check for updates</a>
<b>Configuration</b> Export and import Sync configuration data	<a href="#">Export configuration</a> <a href="#">Import configuration</a>
<b>Expert settings</b>	Only adjust if instructed by support <a href="#">Edit</a>
<b>Full Sync</b> Maintain current configurations, and resync all data. For use when there may be an issue with the previously synced data.	<a href="#">Full Sync now</a>
<b>Troubleshooting</b> Tools for troubleshooting issues with Sync	<a href="#">Export Sync log file</a> <a href="#">Open log folder</a>

## Sync Settings

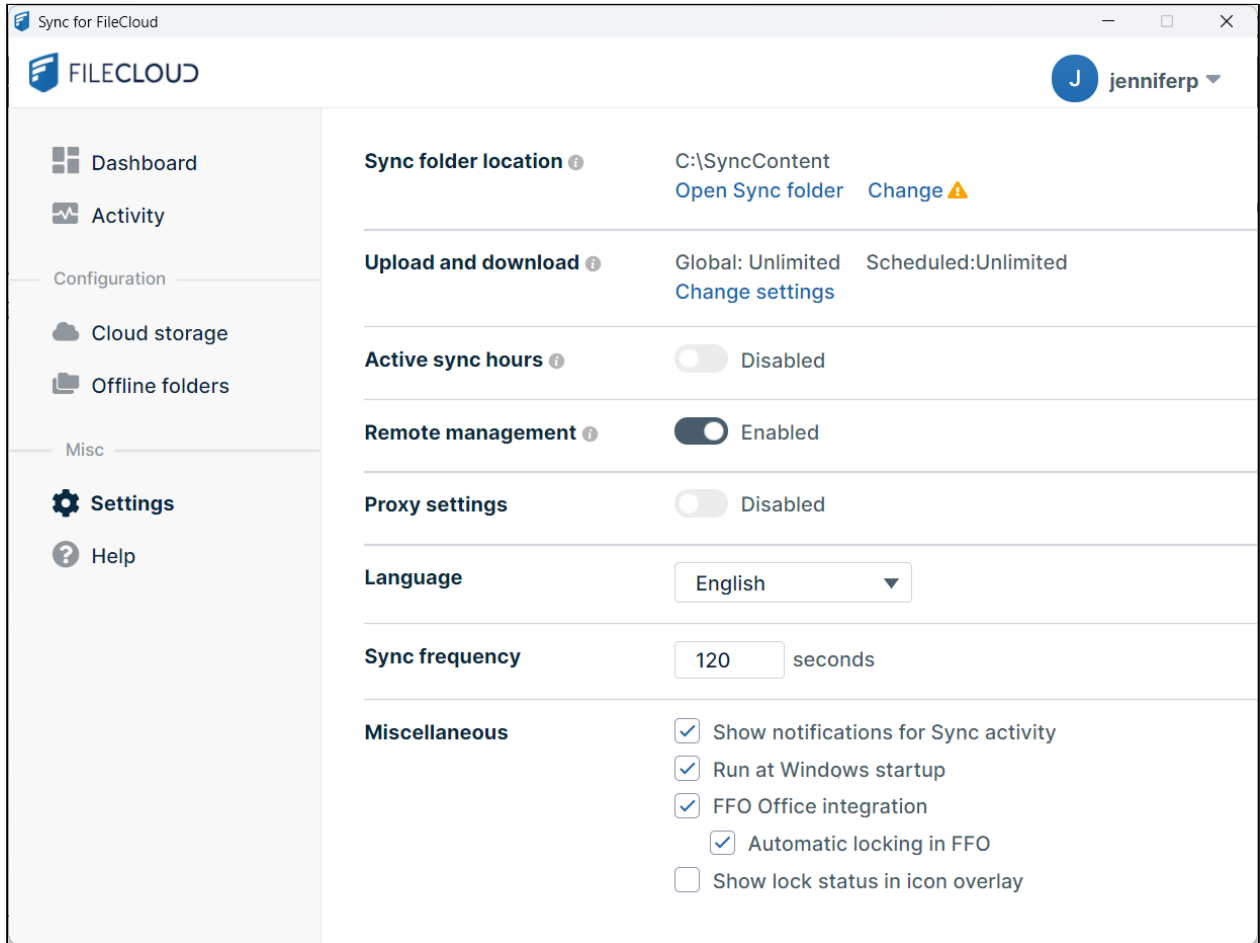
You can view and control Sync settings from the Settings page of the [main dashboard](#).

### To get to the Settings page:

1. In the system tray, right click on the Sync icon, and choose **Open**. Sync's mini-dashboard opens.
2. At the bottom of the mini-dashboard, click the **Settings** icon.



The main dashboard opens to the **Settings** page.



**Sync folder location** ⓘ C:\SyncContent  
Open Sync folder [Change](#) ⚠

---

**Upload and download** ⓘ Global: Unlimited Scheduled: Unlimited  
[Change settings](#)

---

**Active sync hours** ⓘ  Disabled

---

**Remote management** ⓘ  Enabled

---

**Proxy settings**  Disabled

---

**Language** English ▼

---

**Sync frequency** 120 seconds

---

**Miscellaneous**


- Show notifications for Sync activity
- Run at Windows startup
- FFO Office integration
  - Automatic locking in FFO
- Show lock status in icon overlay

Setting	Function
<b>Sync folder location</b>	Click <b>Open Sync Folder</b> to open the Sync directories in your file explorer. Click <b>Change</b> to select a different location (a different drive or folder) for your Sync folder in file explorer.
<b>Upload and download</b>	See <a href="#">Limit upload and download rate</a> .
<b>Active sync hours</b>	See <a href="#">Limit Sync To a Schedule</a> .
<b>Remote management</b>	Allows Sync users to manage their Sync application by overriding an Administrator's settings, but from FileCloud version 19.1 and later, administrator's may disable the ability to override. See <a href="#">Managing Client Devices</a> .



Setting	Function
<b>Proxy settings</b>	Enabled or disabled by default depending on initial Sync configuration. You can enable, disable, and change proxy settings here. You must restart Sync for this to take effect.
<b>Language</b>	Change the language of the interface. You must restart Sync for this to take effect.
<b>Sync frequency</b>	You can change the built-in sync frequency of 120 seconds for cloud storage. You must restart Sync for this to take effect.
<b>Miscellaneous</b>	<ul style="list-style-type: none"> <li>• <b>Show Notifications for Sync Activity</b> - <b>Yes</b> by default. Uncheck to change to <b>No</b>. You must restart Sync for this to take effect.</li> <li>• <b>Run at Windows Startup</b> - <b>No</b> by default. Check to change to <b>Yes</b>.</li> <li>• <b>FFO Office Integration</b> - checked (yes) by default. Uncheck to change the setting. You must restart Sync for this to take effect. If you are using DocIQ instead of FFO, the label appears as <b>DocIQ Office Integration</b>. For more information about DocIQ or FFO, see <a href="#">Using DocIQ with Office for Sync Users</a> or <a href="#">Using FileCloud for Office with Sync</a>. <ul style="list-style-type: none"> <li>• <b>Automatic Locking in FFO</b> - Checked (yes) by default. If automatic locking in FFO is checked, when you open a file in Sync, FFO automatically tries to lock it and give it read-only access. Check or uncheck to change the setting. You must restart Sync for this to take effect. If you are using DocIQ instead of FFO, the label appears as <b>Automatic Locking in DocIQ</b>.</li> </ul> </li> <li>• <b>Trust FFO</b> - Only appears the first time you log in to FileCloud Sync. <ol style="list-style-type: none"> <li>1. Click <b>Trust FFO</b> to use <a href="#">FileCloud for Office</a>.</li> <li>2. If you are prompted to allow installation of the FileCloud for Office certificate, click <b>Yes</b>. The <b>Trust FFO</b> button disappears, and you will not have to click it again.</li> </ol> <div data-bbox="813 1346 1463 1549" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Miscellaneous</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Show notifications for Sync activity</li> <li><input checked="" type="checkbox"/> Run at Windows startup</li> <li><input checked="" type="checkbox"/> FFO Office integration</li> <li><input checked="" type="checkbox"/> Automatic locking in FFO</li> <li><input checked="" type="checkbox"/> <b>Trust FFO</b></li> <li><input type="checkbox"/> Show lock status in icon overlay</li> </ul> </div> </li> <li>• <b>Show Lock Status in Icon Overlay</b> - <b>No</b> by default. When checked, if a user locks a file or folder in Sync, the lock icon overlay appears over it in the Sync directory in file explorer.</li> </ul>

## Limit Sync To a Schedule

 The ability to limit the time when Sync is active is available in FileCloud version 18.2 and later.

You can set a schedule for the times when you want the Sync application to run; otherwise, when it is on, it runs 24 hours, every day.

Scheduling Sync is useful if:

- you are running the FileCloud Sync app on a busy network and want Sync to run at the least busy times
- you want to save your changes to FileCloud only at the end of each day

 If you enter settings, the only time syncing occurs is the time specified in the settings.

For example:

If you choose:

- Sunday and Tuesday for days of the week
- the hours from 8:00 AM To 10:00 AM

Then Sync is active only on Sundays and Tuesdays and only during the hours between 8 AM and 10 AM. It is disabled on other days and times.

**Active sync hours** ✕

**Sync**  Every day

**Select the days of the week when the Sync app should be active:**

Monday  Tuesday  Wednesday  Thursday

Friday  Saturday  Sunday

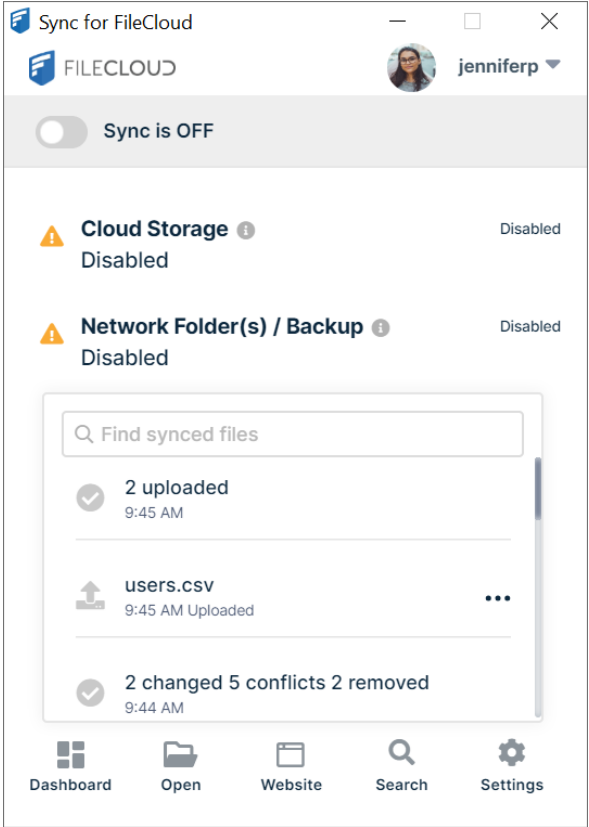
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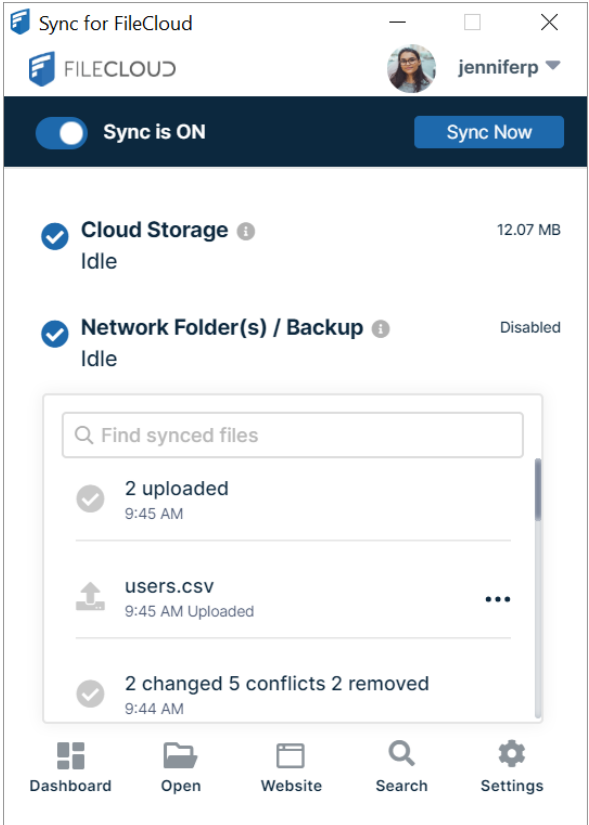
**Select the times on the selected days when the Sync app should be active:**

**Start time:**

**Stop time:**

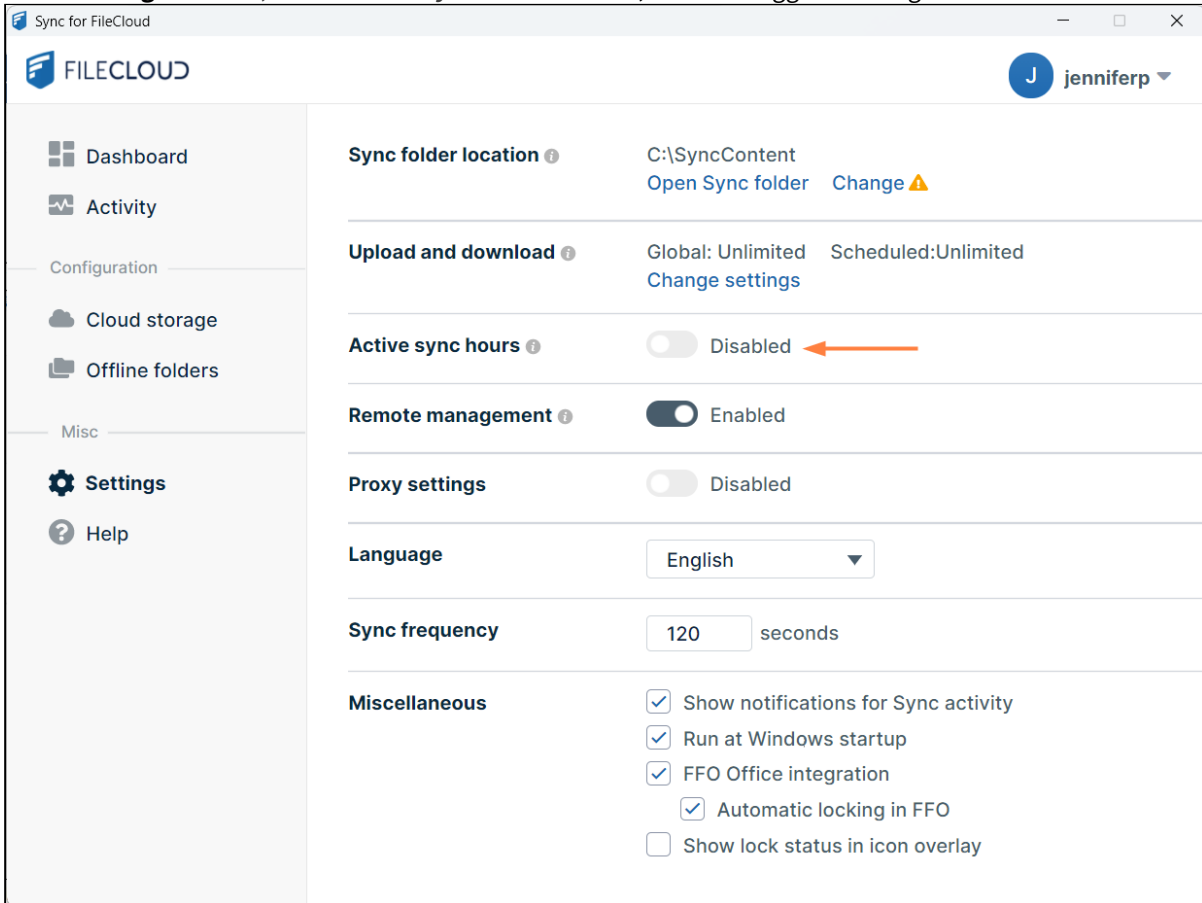
The settings you use impact the Sync application in the following ways:

Setting	Value	Impact	Notes
Active Sync Hours	enabled	<p>Sync is active only during the scheduled times.</p> <ul style="list-style-type: none"> <li>At all other times Sync remains disabled, which means real-time syncing, offline folders syncing, and backup are disabled.</li> <li><b>Sync is off</b> appears on the mini dashboard and main dashboard.</li> </ul>  <p>⚠️ If you choose the Doc editing only mode, then you cannot set Active Sync Hours</p>	

Setting	Value	Impact	Notes
Active Sync Hours	disabled	<p>Sync is always active.</p> <ul style="list-style-type: none"> <li>• <b>Sync is on</b> appears on the mini dashboard and main dashboard.</li> <li>• The <b>Sync Now</b> button appears on the mini dashboard and the main dashboard.</li> </ul> 	<p>If the <b>Active Sync Hours</b> settings are disabled because you are in Document Editing mode, you can enable them by clicking <b>Sync is Off</b> in the main dashboard or mini-dashboard. The dashboard setting now appears as <b>Sync is On</b> and <b>Active Sync Hours</b> settings are enabled.</p>
Doc editing only	enabled	<p>This mode always takes precedence over <b>Active Sync Hours</b></p> <p>If you are in Document editing only mode, the <b>Active Sync Hours</b> settings are disabled.</p>	<p>To use <b>Active Sync Hours</b> settings again:</p> <ul style="list-style-type: none"> <li>• Click <b>Sync is Off</b> in the main dashboard or mini-dashboard. It now appears as <b>Sync is On</b> and <b>Active Sync Hours</b> settings are enabled.</li> </ul>
Doc editing only	disabled	<p><b>Active Sync Hours</b> settings are enabled and a schedule can be set.</p>	

**To set a schedule for Sync times:**

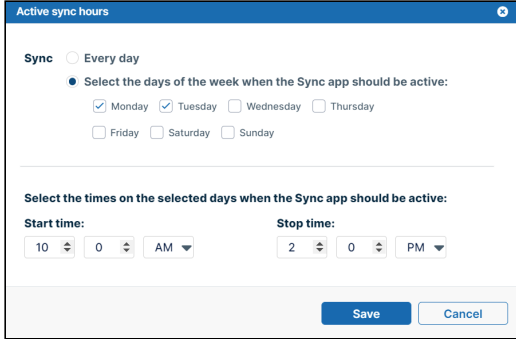
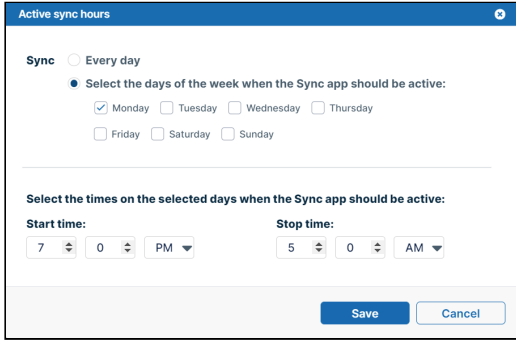
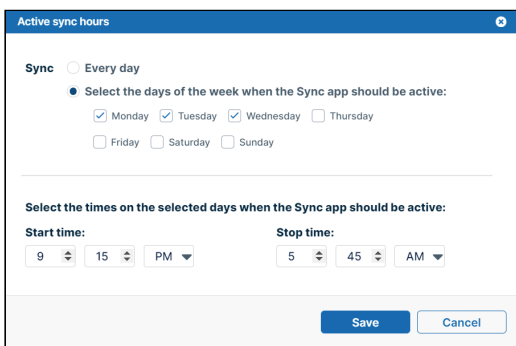
1. In your system tray, right-click on the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Settings**.  
The **Settings** window in the main dashboard opens.
3. In the **Settings** window, in the **Active Sync Hours** section, click the toggle to change it to **Enabled**.

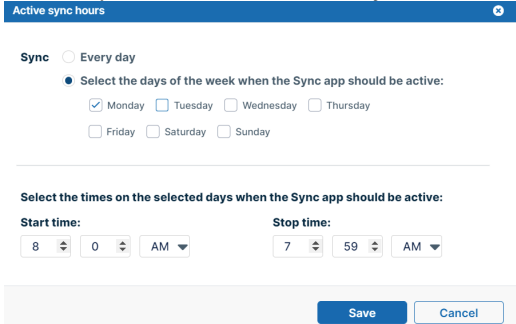
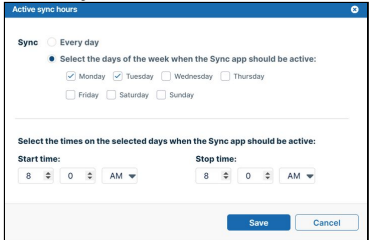


The **Active Sync Hours** dialog box opens.


4. Select **Every Day** or **On a Specific Day**.
5. If you choose **On a Specific Day**, check all of the days that you want Sync active
6. You can only set one time interval. Use the **Start Time** and **Stop Time** fields.  
If you want an overnight time interval, the **End Time** must precede the **Start Time**. Otherwise, Sync assumes the time interval occurs on each checked day separately. See [Special cases for active sync hours](#), below.
7. Click **Save**.
8. Restart Sync to apply your changes.

## Special cases for Active Sync Hours

Case	How to configure	Notes:
<p>Active times start and stop at the same times multiple days, that is:  <b>Mon 10:00 am - Mon 2:00 pm</b>  <b>and</b>  <b>Tues 10:00 am - Tues 2:00 pm</b></p>		<p>The Sync app does not treat this as Monday 10:00 am to Tuesday at 2:00 pm.</p>
<p>If <b>Stop time</b> is later than <b>Start time</b>, do not check the next day; it is assumed that the time continues into the next day.</p> <p>If you check the next day, the app includes the next day and its following day as well (see the example in the next row).</p>		<p>The Sync app treats this as Monday 7:00 pm to Tuesday 5:00 am.</p> <p>(If you check Monday and Tuesday, The Sync app would treat it as Monday 7:00 pm - Tuesday 5:00 am and Tuesday 7:00 pm to Wednesday 5:00 am)</p>
<p>Active times are overnight on consecutive days, that is:  <b>Mon 9:15 pm - Tue 5:45 am</b>  <b>and</b>  <b>Tue 9:15 pm - Wed 5:45 am</b>  <b>and</b>  <b>Wed 9:15 pm - Thu 5:45 am</b></p>		<p>The Sync app does not treat this as Monday 9:15 pm through Thursday 5:45 am.</p>

Case	How to configure	Notes:
<p>From a certain time one day to the same time the next day, for example: <b>8am Mon - 8am Tues</b></p>	<p>Not possible, instead schedule from Monday 8am to 7:59 am. The Sync app assumes that the time period flows into Tuesday.</p> 	<p>The following setting would cause sync to never occur:</p> 

## Limit upload and download rate


 The ability to limit the rate that Sync uploads and downloads files to reduce the impact on the network is available in FileCloud version 18.2 and later.

If you are running the FileCloud Sync app on a slow network, when Sync transfers files it can quickly use up the resources of the network.

- You can limit Sync's upload and download rate to reduce the impact on your network and day to day operations.
  - Rates are specified in kilobytes (KB/s).
  - You can set a limit to be used whenever you are running Sync.
  - You can set a limit that is enforced only during a specific interval of time.
  - You can set a different rate limit for uploading files than you set for downloading.
- If the available KB/s are less than the specified maximum, then file transfer will be limited to the available KB/s.
- Sync maintains the file transfer limits even when there are multiple simultaneous uploads or downloads.

For example,

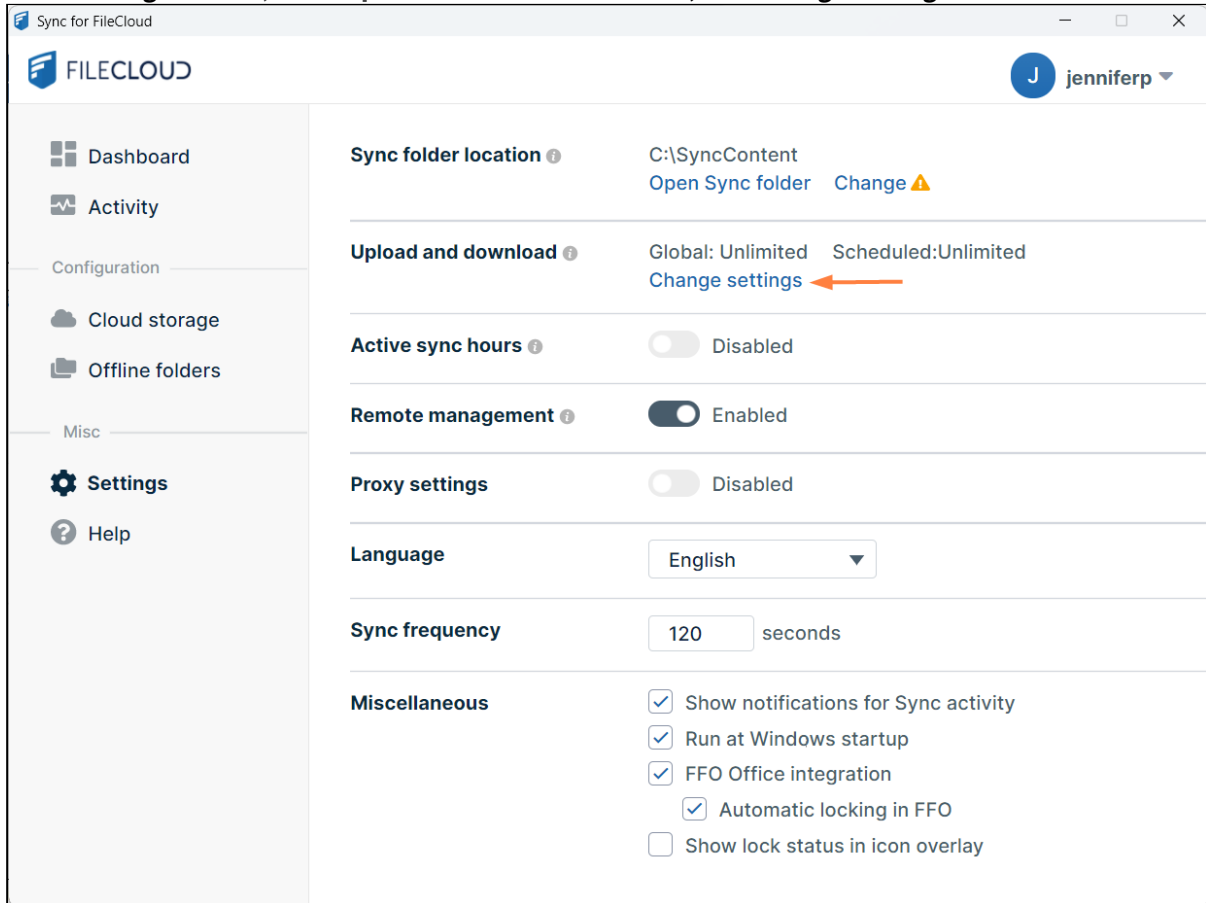
- If the default simultaneous uploads or downloads is 4 and you set a 400 KB/s rate limit
- If 4 streams are active, then each is limited to 100 KB/s
- If only one stream is active then that stream will take up 400 KB/s

 If you do not specify a rate limit or if it is set to -1, then Sync will use all of the available KB/s.

### To set a rate limit for Sync:

- In your system tray, right-click on the Sync icon and choose **Open**.
- In the mini-dashboard, click **Settings**.  
The **Settings** window in the main dashboard opens.

3. In the **Settings** window, in the **Upload and Download** section, click **Change Settings**.



The **Upload and Download** window opens.



**Upload and download** ✕

**Global rate limits:** ⓘ

Max upload speed Unlimited KB/s"

Max download speed Unlimited KB/s

**Scheduled rate limits:** ⓘ

Max upload speed Unlimited KB/s

Max download speed Unlimited "KB/s"

---

**Scheduled rate limits:**

Every day

On a specific day

Select Day ▼

**Start time:**

▼

▼

AM ▼

**Stop time:**

▼

▼

AM ▼

Save

Cancel

4. Under **Global Rate Limits**, check **Max Upload Speed** or **Max Download Speed** and enter a number for **KB/s**.
5. To set a limit that is enforced only during a specific time interval:
  1. Under **Scheduled Rate Limits**, check **Max Upload Speed** or **Max Download Speed** and enter a number for **KB/s**
  2. In the lower portion of the window:
    - i. Leave **Every Day** checked, or check **On a Specific Day** and choose the day in the **Select Day** drop-down list.
    - ii. Leave the **Start Time** and **Stop Time** at 0 (to indicate all times) or enter times when the scheduled rate limits are effective.  
In the following example, maximum upload and download speeds have been set to 150 KB/s for Saturdays at 6 am to 9 pm only.

Upload and download
✕

**Global rate limits:** ⓘ

Max upload speed  KB/s"

Max download speed  KB/s"

**Scheduled rate limits:** ⓘ

Max upload speed  KB/s

Max download speed  "KB/s"

---

**Scheduled rate limits:**

Every day

On a specific day

Start time:

Stop time:

Save

Cancel

6. Click **Save**.
7. Restart Sync to apply your changes.

## Synchronizing Files

### Automatic Syncing

By default, when FileCloud Sync is on, files and folders are automatically synced.

#### Automatic Sync schedules

By default, automatic syncing takes place 24 hours/day, every day. However, you may change this schedule.

- [Change the default Sync schedule](#)

Files and folders in Managed Storage are automatically synced every 2 minutes by default, but you can change this in the setting [Sync Frequency](#).

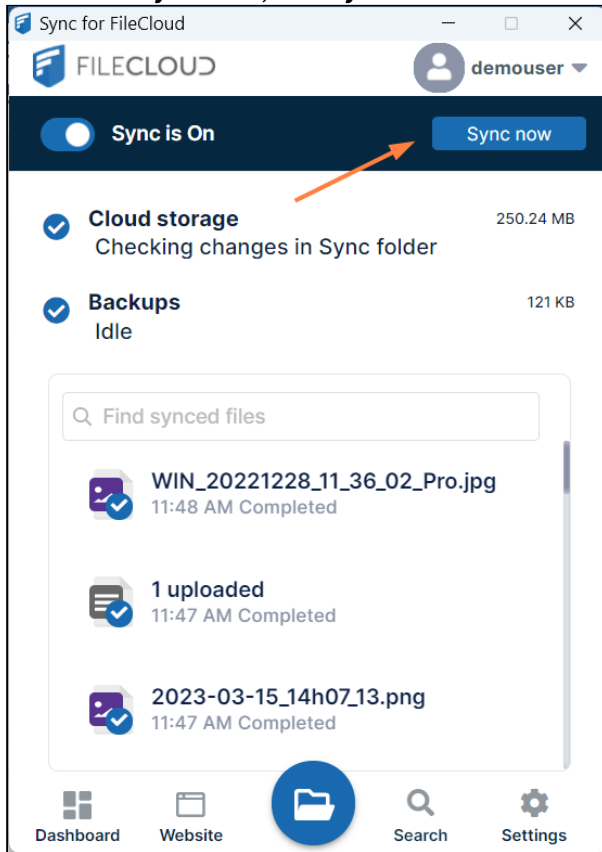
### Manual Syncing

You can also sync files manually from the mini-dashboard or main dashboard at any time.

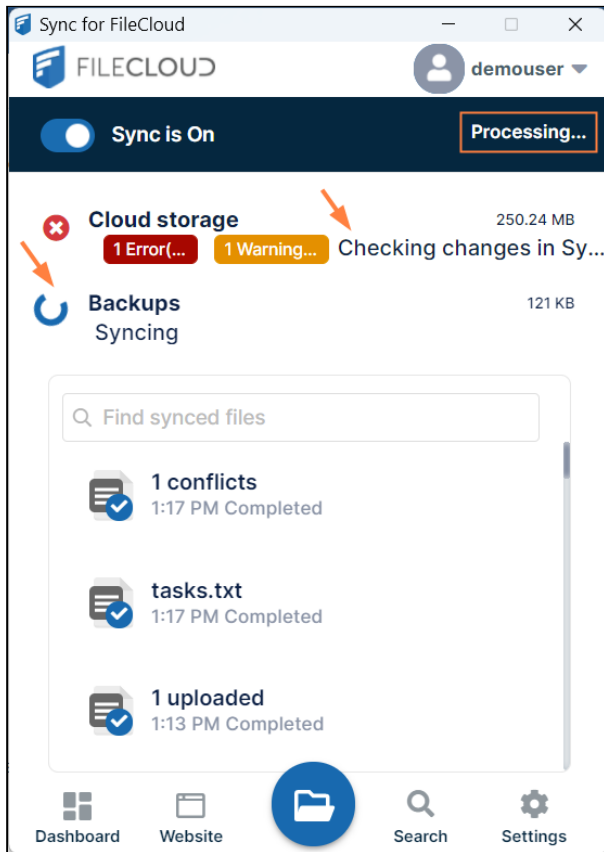
#### Manually sync from the mini-dashboard

**To manually sync from the mini-dashboard:**

1. In your system tray, right-click on the Sync icon and choose **Open**.  
The mini-dashboard opens.
2. If you see **Sync is OFF** at the top of the mini-dashboard, click the toggle to change the setting to **Sync is ON**.
3. Across from **Sync is ON**, click **Sync Now**.

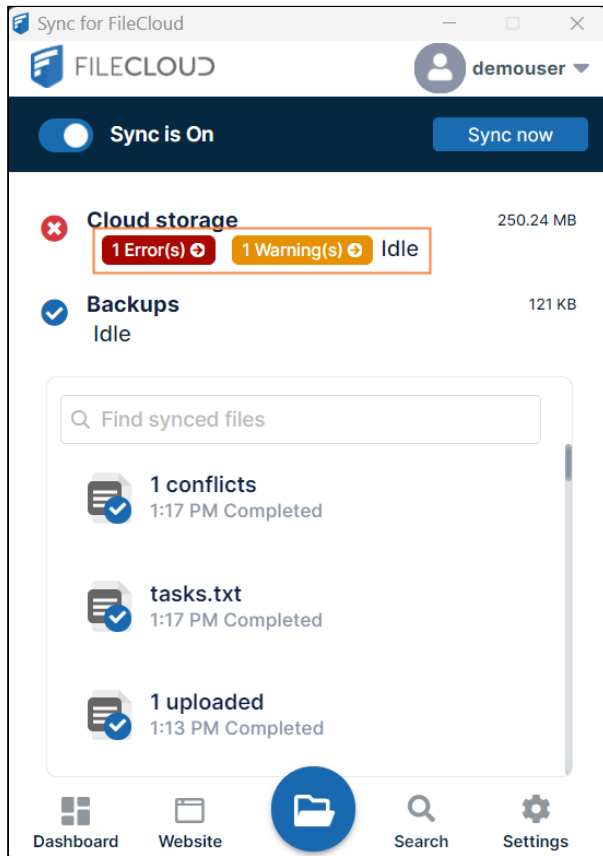


The mini-dashboard indicates if cloud storage or backups are being processed, lists the files being processed, and indicates any errors or conflicts.



When processing is complete, **Cloud storage** and **Backups** displays **Idle** next to them as well as the number of files with errors. To handle error files after syncing see [Managing Sync Conflicts](#) and [Sync Troubleshooting](#)

## Guide.

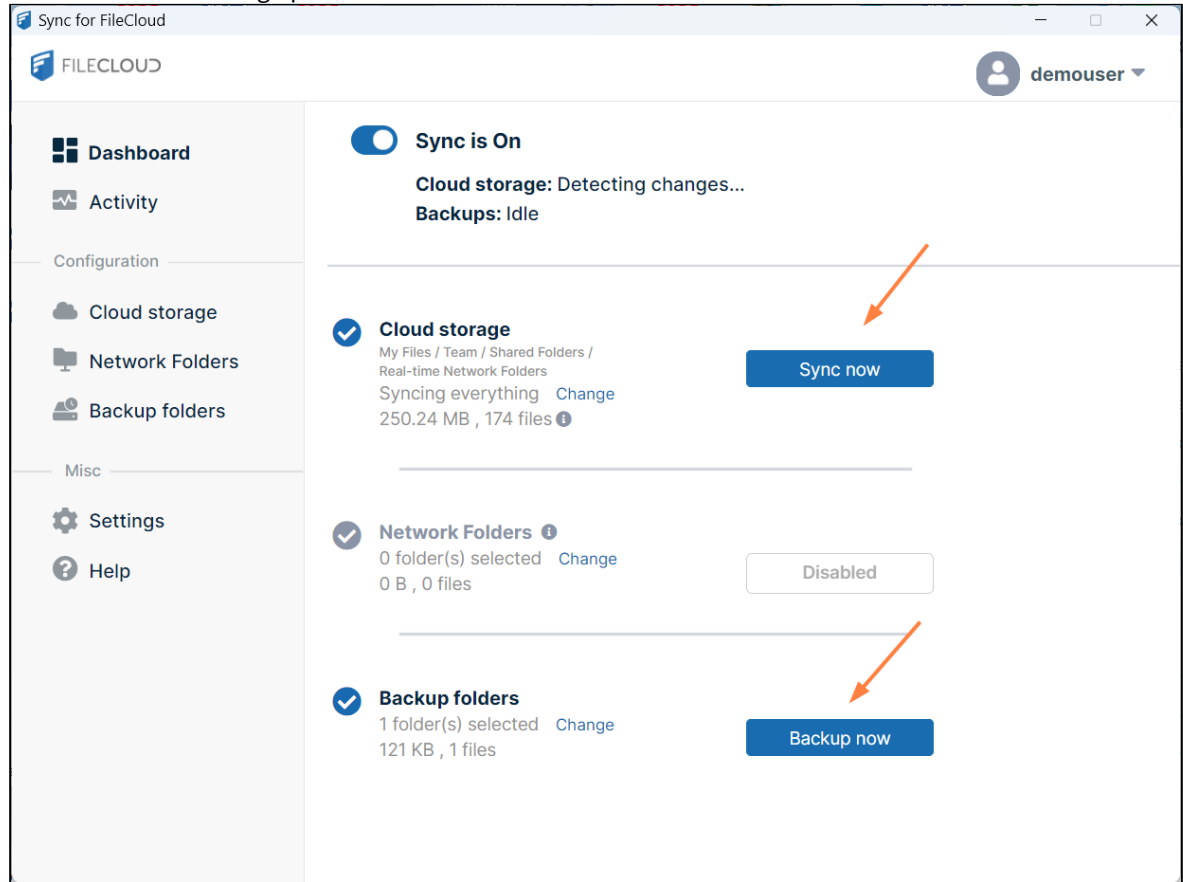


### Manually sync from the main dashboard

#### To manually sync from the main dashboard:

1. In your system tray, right-click on the Sync icon and choose **Open**.  
The mini-dashboard opens.
2. Click the **Dashboard** icon.  
The main dashboard opens to the **Dashboard** screen.
  - a. **Cloud Storage** is listed with a **Sync Now** button next to it if syncing is enabled and files are available for syncing. **Backup Folders** is listed with a **Backup Now** button next to it if backing up is enabled and files

are selected for backing up.



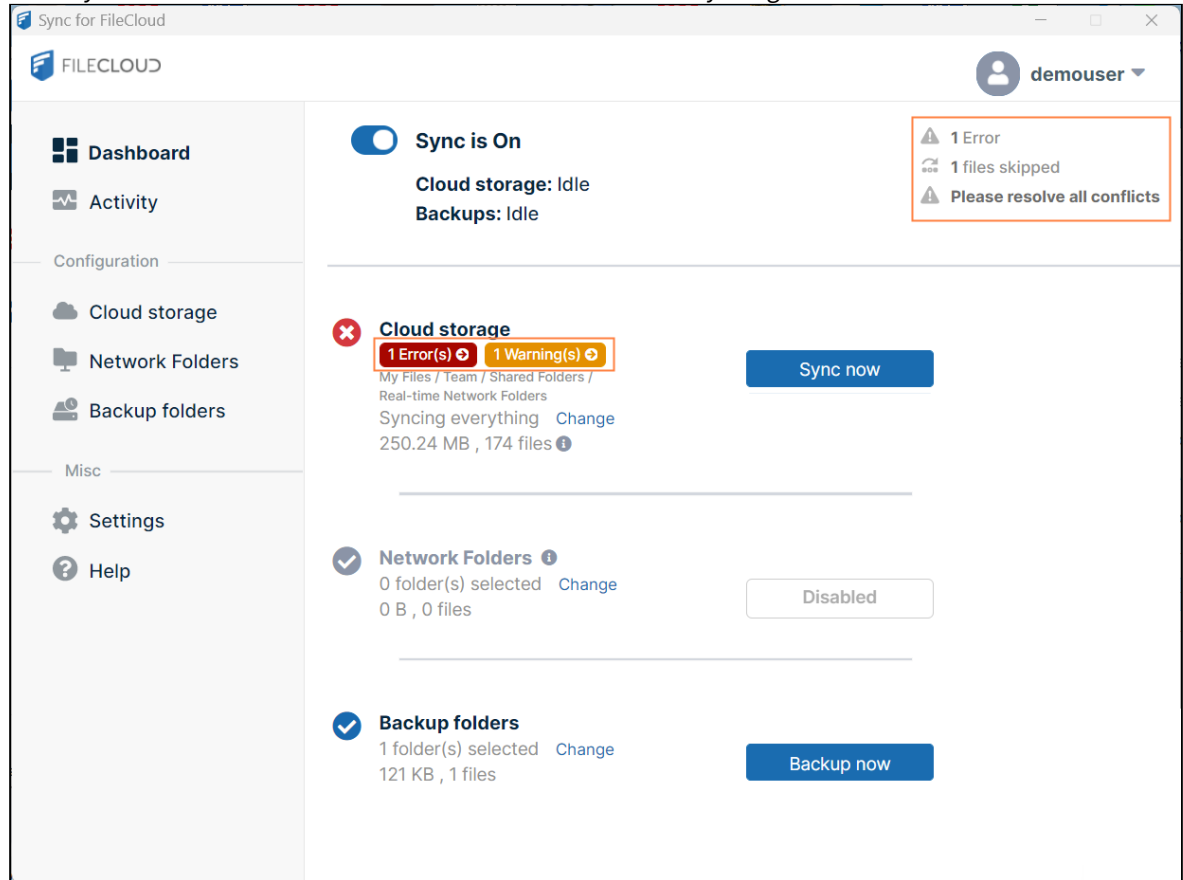
- b. Click the **Sync Now** button to begin syncing files and folders or the **Backup now** button to begin backing up.  
The screen indicates that sync or backup is in process:

The screenshot shows the 'Sync for FileCloud' application window. The interface includes a sidebar with navigation options: Dashboard, Activity, Configuration (Cloud storage, Network Folders, Backup folders), and Misc (Settings, Help). The main content area displays the sync status:

- Sync is On**: A toggle switch is turned on. Below it, the status is 'Cloud storage: Checking changes in Sync fol...' and 'Backups: Idle'. In the top right corner, there are three warning icons: '1 Error', '1 files skipped', and 'Please resolve all conflicts'.
- Cloud storage**: This section has a red 'x' icon and shows '1 Error(s)' and '1 Warning(s)'. It lists 'My Files / Team / Shared Folders / Real-time Network Folders' and 'Syncing everything'. A 'Change' link is present. Below this, it shows '250.24 MB , 174 files'. A 'Processing...' button is highlighted with a red box.
- Network Folders**: This section has a green checkmark icon and shows '0 folder(s) selected' and '0 B , 0 files'. A 'Change' link is present. A 'Disabled' button is shown.
- Backup folders**: This section has a green checkmark icon and shows '1 folder(s) selected' and '121 KB , 1 files'. A 'Change' link is present. A 'Backup now' button is shown.

When syncing is complete, the screen displays the size and number of files synced and the number of skipped files and errors. Files are skipped if there is a problem that prevents syncing, such as bad characters in the filename. A warning triangle and errors indicate that there was a conflict due to two

recently saved versions of the file or another error that causes syncing to fail.



- c. To see why files were skipped, resolve conflicts, or review other errors click the skipped message or error message.

After syncing:

## Managing Sync Conflicts

### What is a Sync conflict?

Conflict can arise under the following conditions:

- When two people save the same file at approximately the same time. In this case the first person's changes are saved to the server, and when the second person's sync app tries to save the file, it realizes there is a new version and prevents the second person's changes from uploading and overwriting the first person's changes. In this case the first person's file is downloaded instead and saved locally adjacent to the original file with "Conflict\_" appended to it.
- While one person was editing a file offline, the file was modified by another user. When the person who was offline comes back online and the sync app tries to upload the edited version to the server, it detects that there is a new version available and instead of overwriting the changes on the server, it downloads the server file locally and mark it as a "Conflict" file.



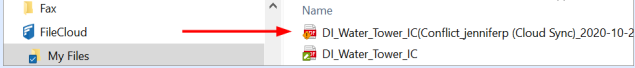
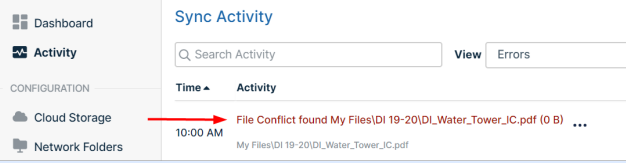
When two people change the same file at the same time, FileCloud Sync app won't try to merge the changes.

- Instead, Sync will save the original file
- Sync also saves a second version which has the same name but is appended with the information about the conflict

- i** Conflict files are named as follows, where **filename** is the name of the file with the conflict, and the date is the date and time of the conflict:
- For a file in a shared folder, where **other** is the name of the other user who modified the file: **filename**(Conflict\_**other** (Web browser)\_2020-03-25-22-50-36).txt
  - For a file in a team folder, where **teamname** is the team folder account name: **filename**(Conflict\_**teamname** (Web browser)\_2020-03-25-23-01-42).txt
  - For a read-only file in a local sync folder,: **filename**(Conflict\_Read-Only\_2020-04-27-21-35-33).doc

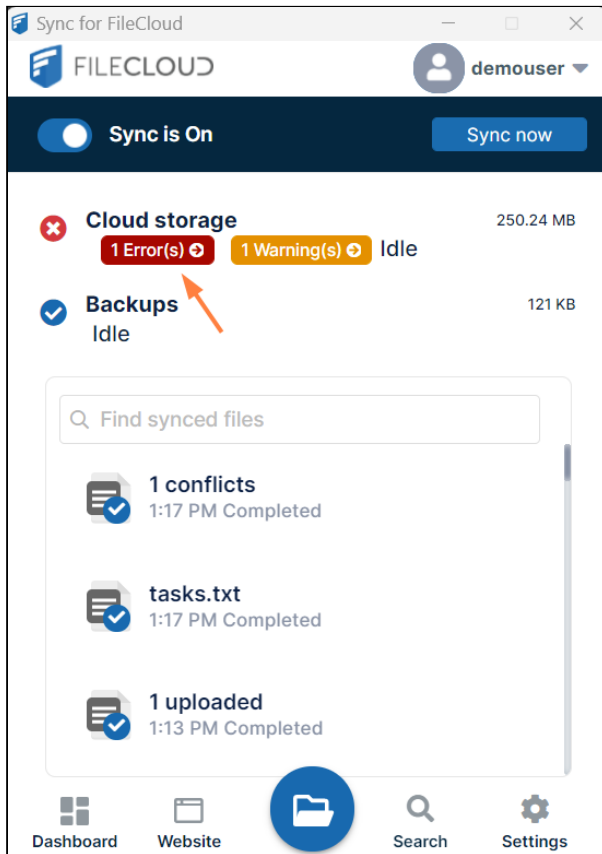
By creating a second file, FileCloud Sync ensures that all changes are preserved and one person's changes do not overwrite another person's work.

Your Sync conflicts appear in two places, and you can resolve them in either.

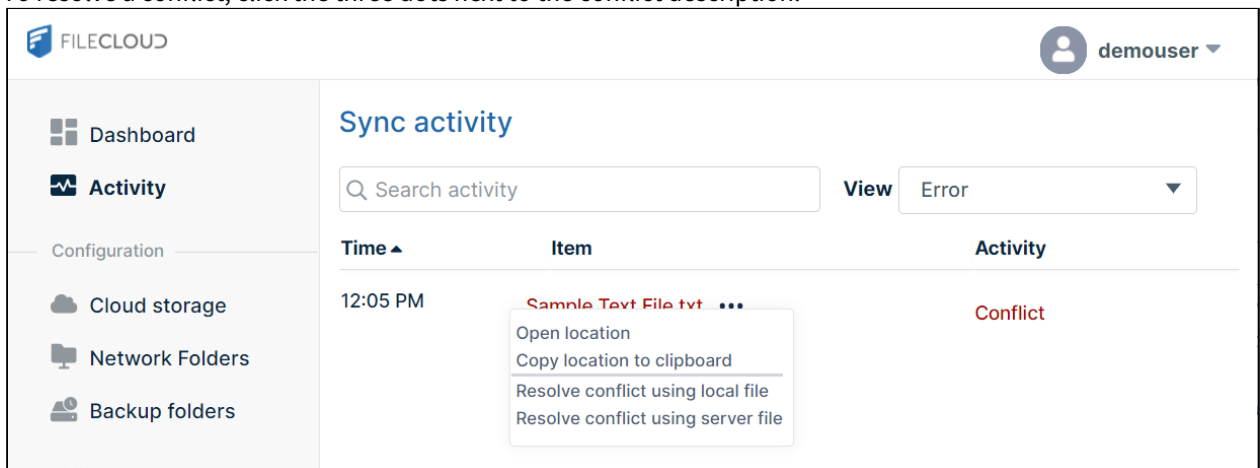
A conflict file appears in your browser's file listing	It also appears in the Activities window of the dashboard
	

### To resolve an individual conflict from the Sync dashboard:

1. In your system tray, right-click on the Sync icon and choose **Open**.  
The mini-dashboard opens. If a previous Sync resulted in conflicts or other errors, it displays an error notification.



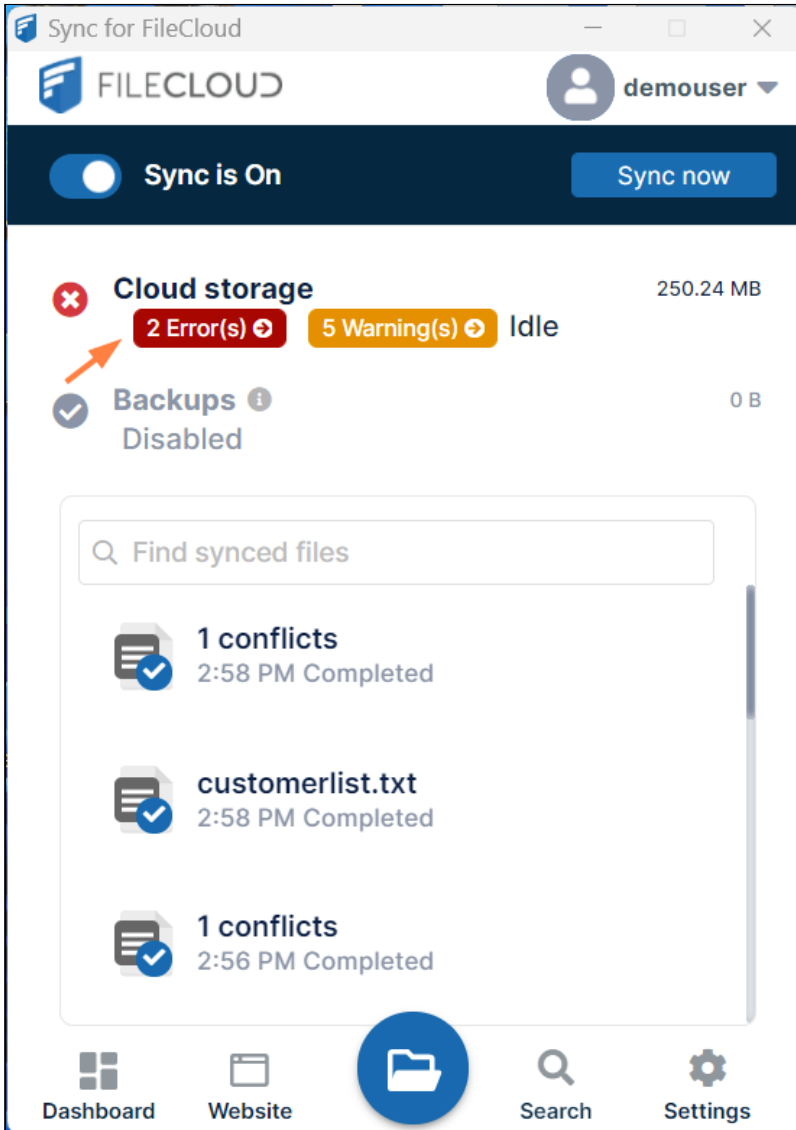
2. Click the error notification.  
The dashboard opens to the **Activity** window with **Error** selected in the **View** drop-down list. Errors, including conflict errors, are listed below it.
3. To resolve a conflict, click the three dots next to the conflict description.



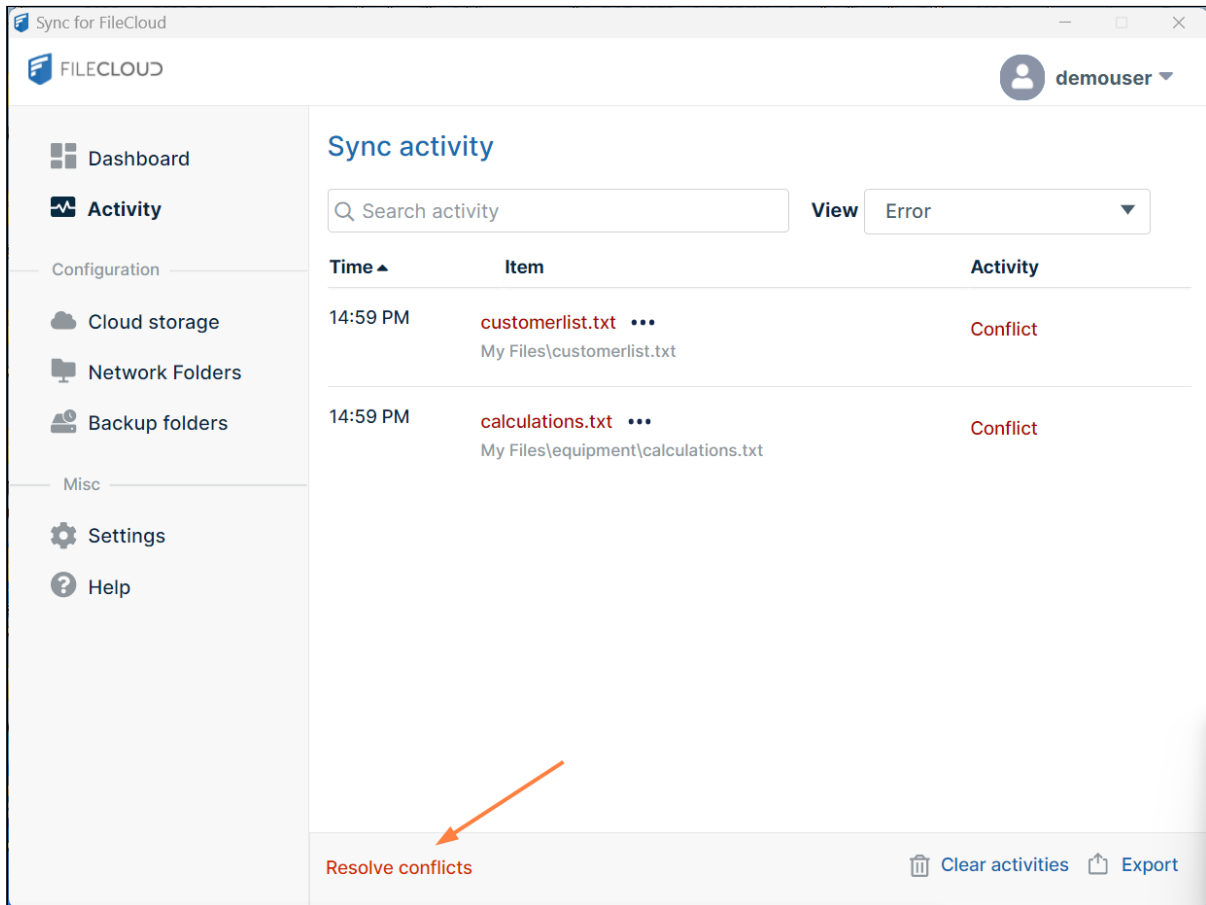
4. Click **Resolve conflict using local file** to discard the server file and keep your modified local file.  
or  
Click **Resolve conflict using server file** to discard the local file and save the file that is currently on the server.
5. If you want to go to your Sync folder in file explorer and resolve the conflict there, click **Open Location**.
6. If you want to copy and paste the location in a message or file, click **Copy Location to Clipboard**.

## To resolve multiple conflicts from the Sync dashboard:

1. In your system tray, right-click the Sync icon and choose **Open**.  
The mini-dashboard opens. If a previous Sync resulted in conflicts or other errors, it displays an error notification.



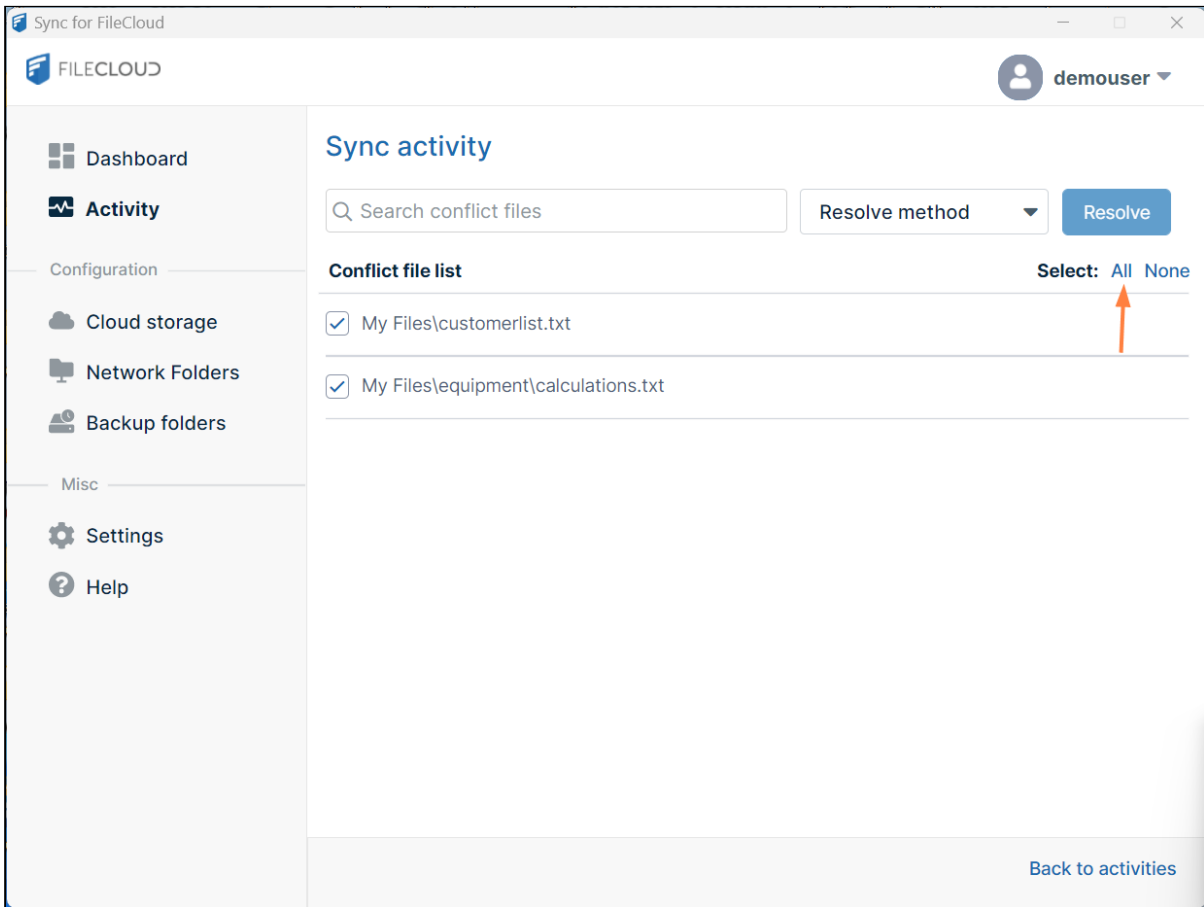
2. Click the error notification.  
The dashboard opens to the **Activity** window with **Error** selected in the **View** drop-down list. Conflicts and other errors are listed below it.
3. At the bottom of the window, click the **Resolve Conflicts** link.



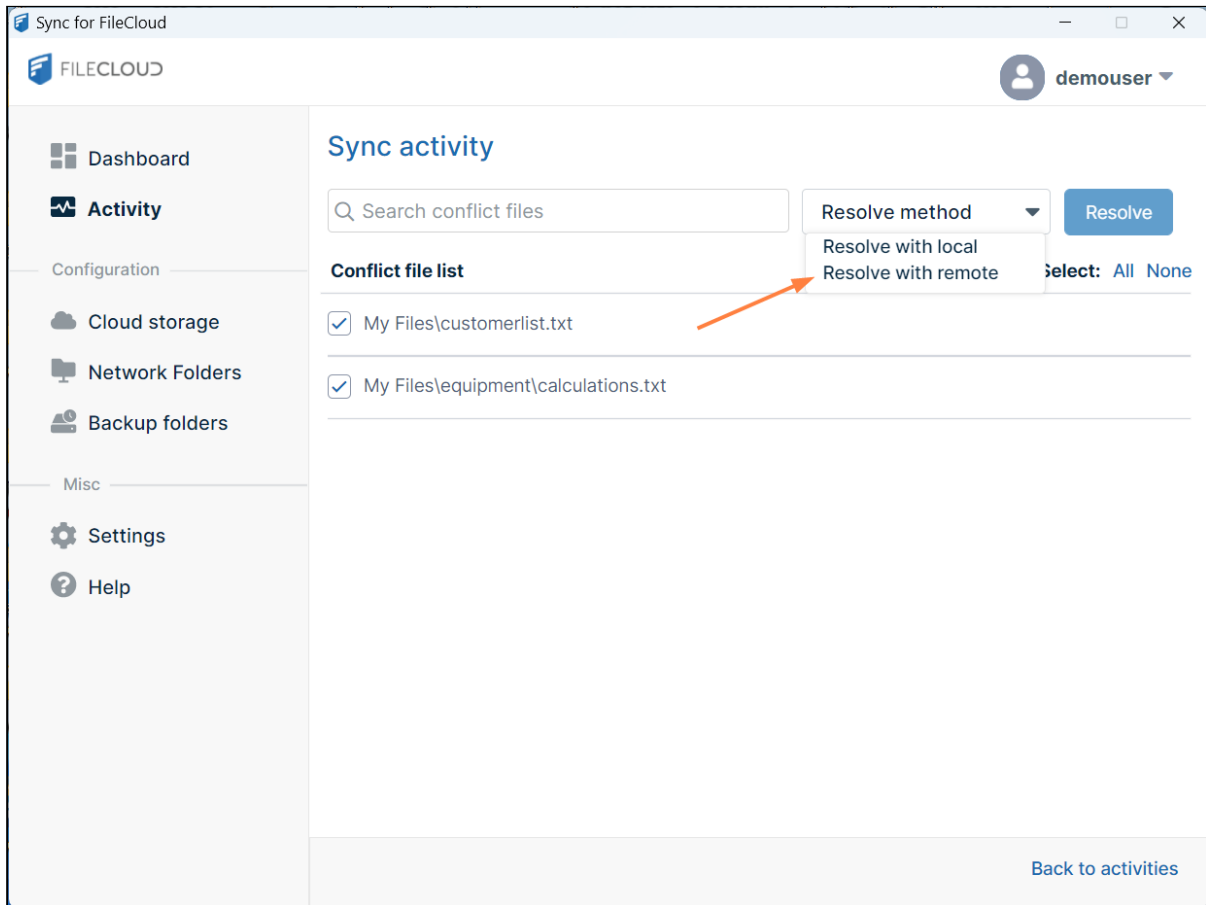
The screenshot shows the 'Sync for FileCloud' application window. The title bar reads 'Sync for FileCloud'. The top left corner features the 'FILECLOUD' logo. The top right corner shows a user profile icon for 'demouser'. A left-hand navigation menu includes 'Dashboard', 'Activity' (selected), 'Configuration', 'Cloud storage', 'Network Folders', 'Backup folders', 'Misc', 'Settings', and 'Help'. The main content area is titled 'Sync activity' and contains a search bar labeled 'Search activity' and a 'View' dropdown menu set to 'Error'. Below this is a table with three columns: 'Time', 'Item', and 'Activity'. The table lists two conflict entries, both at 14:59 PM. The first entry is for 'customerlist.txt' located at 'My Files\customerlist.txt'. The second entry is for 'calculations.txt' located at 'My Files\equipment\calculations.txt'. At the bottom of the table, there is a 'Resolve conflicts' link with a red arrow pointing to it. To the right of this link are 'Clear activities' and 'Export' buttons.

Time	Item	Activity
14:59 PM	customerlist.txt ... My Files\customerlist.txt	Conflict
14:59 PM	calculations.txt ... My Files\equipment\calculations.txt	Conflict

- The window now displays the file conflicts with checkboxes beside them and a **Resolve method** drop-down list.
4. Click **All** to check all of the files, or individually check files.



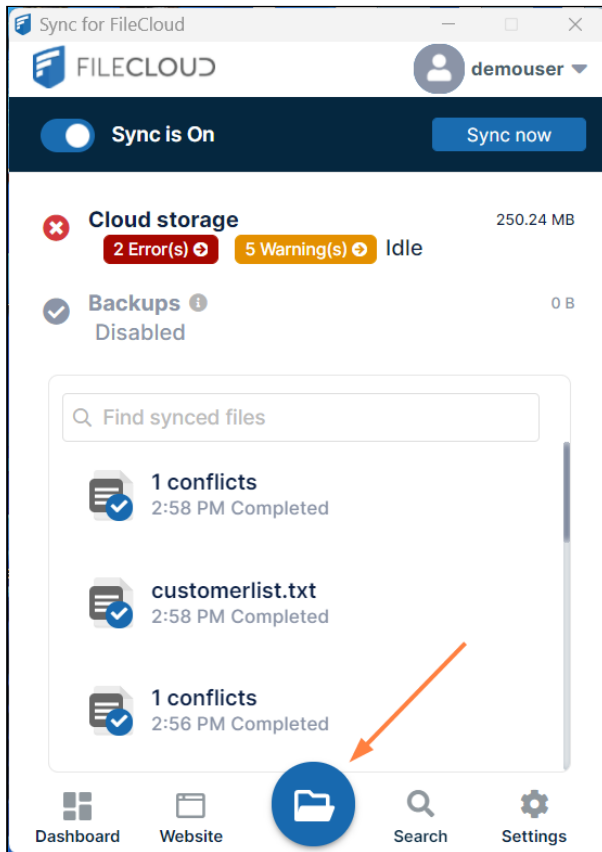
5. In the **Resolve method** drop-down list:  
Choose **Resolve with Local** to discard the server file and keep your modified local file for each checked conflict.  
or  
Choose **Resolve with Remote** to discard the local file and save the file that is currently on the server for each checked conflict.



6. Click **Resolve**.
7. In the confirmation box, click **Yes**.

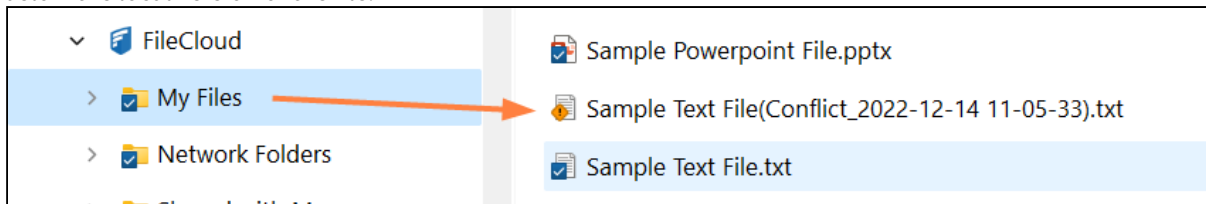
### Resolve a conflict from the Sync directory in file explorer:

1. In your system tray, right-click on the Sync icon and choose **Open**.
2. In the mini-dashboard, click the **Open Sync Folder** icon.

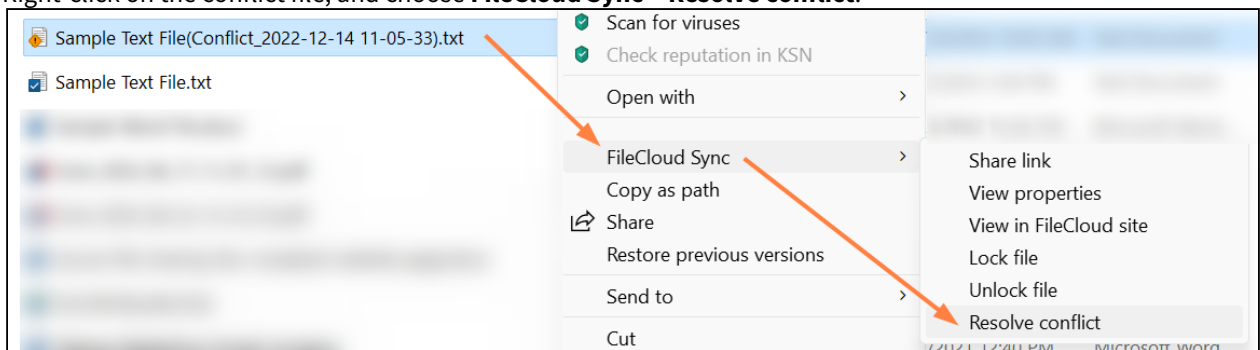


File explorer opens and displays your Sync directory.

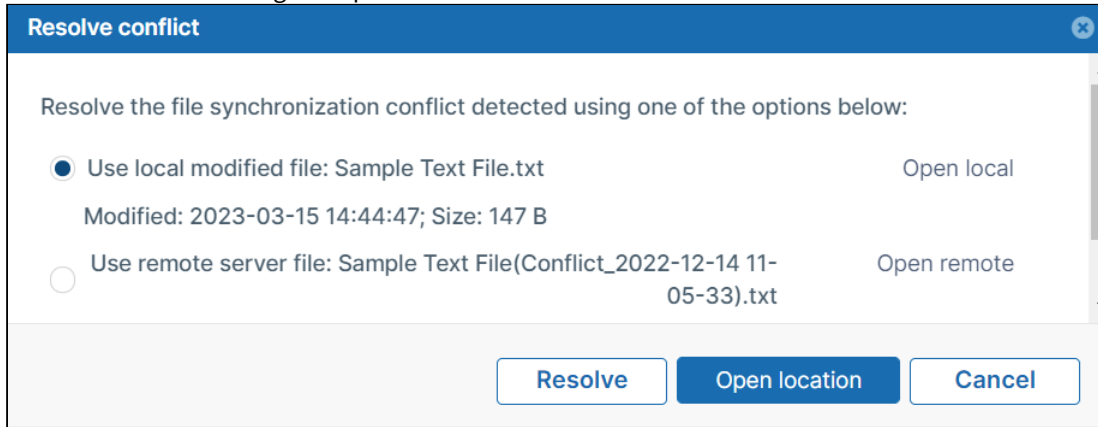
3. Open the folder in your Sync directory that contains the conflict file or folder.  
A conflict file has a yellow warning icon over it and a name in conflict format in parentheses. It appears above or below the local version of the file.



4. Right-click on the conflict file, and choose **FileCloud Sync > Resolve conflict**.



A **Resolve Conflict** dialog box opens.



5. If you want to check the content of either file before choosing which copy to save, click **Open local** or **Open remote**.
6. Select **Use local modified file: (filename)** to discard the server file and keep your modified local file.  
or  
select **Use remote server file: (filename)** to discard your modified local file and save the server file.
7. Click **Resolve**, and confirm your change.  
The conflict file no longer appears.

## Reviewing Skipped Files

When synchronization occurs, some file types in the local Sync folder are not processed by the Sync client application because they are on the list of ignored files.

- Files of this type are not uploaded from your local computer to the server.

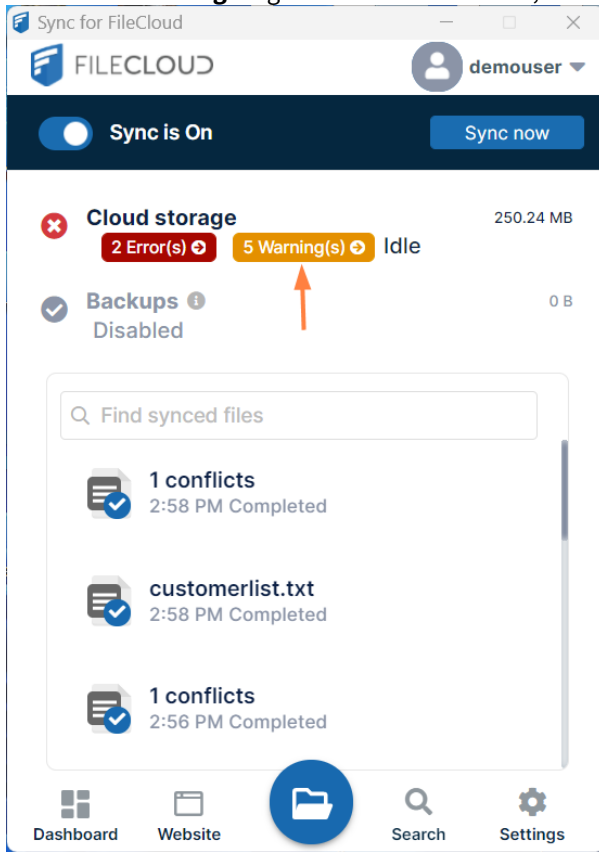
The following types of files are currently ignored by the Sync client application:

Description	Notes
Files in use	These are files that have an exclusive write lock or are read-only
File names matching the skip regex string	This is configured in a file, usually by your administrator
File names with special characters	~, <, >, :, \, /, *, ?, \r, \n And also .cache and .tmp.part files
File name extensions which are restricted by the server	This is configured by your administrator

**To view a list of skipped files:**



1. In your system tray, right-click on the Sync icon and choose **Open**.
2. If there is a **Warnings** tag in the mini-dashboard, click the tag.



The **Activity** screen opens with **Skipped (All)** appearing in the **View** drop-down list.

The screenshot shows the 'Sync activity' page in FileCloud. On the left is a navigation sidebar with 'Dashboard', 'Activity', 'Configuration', 'Cloud storage', 'Network Folders', 'Backup folders', 'Misc', 'Settings', and 'Help'. The main content area has a search bar, a 'View' dropdown set to 'Skipped (All)', and a table of activity records. The table has columns for 'Time', 'Item', and 'Activity'. Four records are shown, all with the status 'Skipped (All)'. The 'Item' column contains error messages: 'Bad characters in file name: CLFC-50021-...' followed by the file path. An orange arrow points to the 'View' dropdown menu.

Time	Item	Activity
15:20 PM	Bad characters in file name: CLFC-50021-... My Files\README(Conflict_2022-12-14 11-17-06).md	Skipped (All)
15:20 PM	Bad characters in file name: CLFC-50021-... My Files\Sample Text File(Conflict_2022-12-14 11-05-33).txt	Skipped (All)
15:20 PM	Bad characters in file name: CLFC-50021-... My Files\tasks(Conflict_2023-03-07 14-57-46).txt	Skipped (All)
15:20 PM	Bad characters in file name: CLFC-50021-... My Files\equipment\calculations(Conflict_2023-03-16 14-56-29).txt	Skipped (All)

The description for each file indicates why it was skipped.

- Click the three dots next to the description for options.

This screenshot is similar to the previous one but shows a context menu for the first file. The menu has two options: 'Open location' and 'Copy location to clipboard'. An orange arrow points to the 'Open location' option.

Time	Item	Activity
15:20 PM	Bad characters in file name: CLFC-50021-... My Files\README(Conflict_2022-12-14 11-17-06).md	Skipped (All)
15:20 PM	Bad characters in file name: CLFC-50021-... My Files\Sample Text File(Conflict_2022-12-14 11-05-33).txt	Skipped (All)

- Click **Open Location** to open the folder in file explorer where the file is stored, or click **Copy Location to Clipboard** to copy the storage path so you can paste it into a message or a file.
- You may go through the files and correct the problems causing them to be skipped and Sync again.

#### To export or clear the skipped files:

- At the bottom of the screen, click **Export** or **Clear**.  
Clicking **Clear** does not only clear records in **Skipped (All)** view, it clears all **Sync Activity** records.

The screenshot shows the 'Sync activity' section of the FileCloud interface. On the left is a navigation sidebar with options: Dashboard, Activity, Configuration, Cloud storage, Network Folders, Backup folders, Misc, Settings, and Help. The main area displays a table of sync activities. At the top right, there is a search bar and a 'View' dropdown menu set to 'Skipped (All)'. The table has three columns: 'Time', 'Item', and 'Activity'. All four entries show a time of 15:20 PM and a status of 'Skipped (All)'. An orange arrow points to the 'Clear activities' button at the bottom right of the table.

Time	Item	Activity
15:20 PM	Bad characters in file name: CLFC-50021-... My Files\README(Conflict_2022-12-14 11-17-06).md	Skipped (All)
15:20 PM	Bad characters in file name: CLFC-50021-... My Files\Sample Text File(Conflict_2022-12-14 11-05-33).txt	Skipped (All)
15:20 PM	Bad characters in file name: CLFC-50021-... My Files\tasks(Conflict_2023-03-07 14-57-46).txt	Skipped (All)
15:20 PM	Bad characters in file name: CLFC-50021-... My Files\equipment\calculations(Conflict_2023-03-16 14-56-29).txt	Skipped (All)

Clear activities Export

## Checking Sync Status

You can check the status of your most recent sync in the main dashboard, the mini dashboard, or on the system tray icon.

### Status in the main dashboard

After a sync operation runs, if there are any errors or skipped files, the main dashboard displays a count in the upper-right corner. It also displays a red error sign, a yellow warning sign, or a check (to indicate a successful run) beside

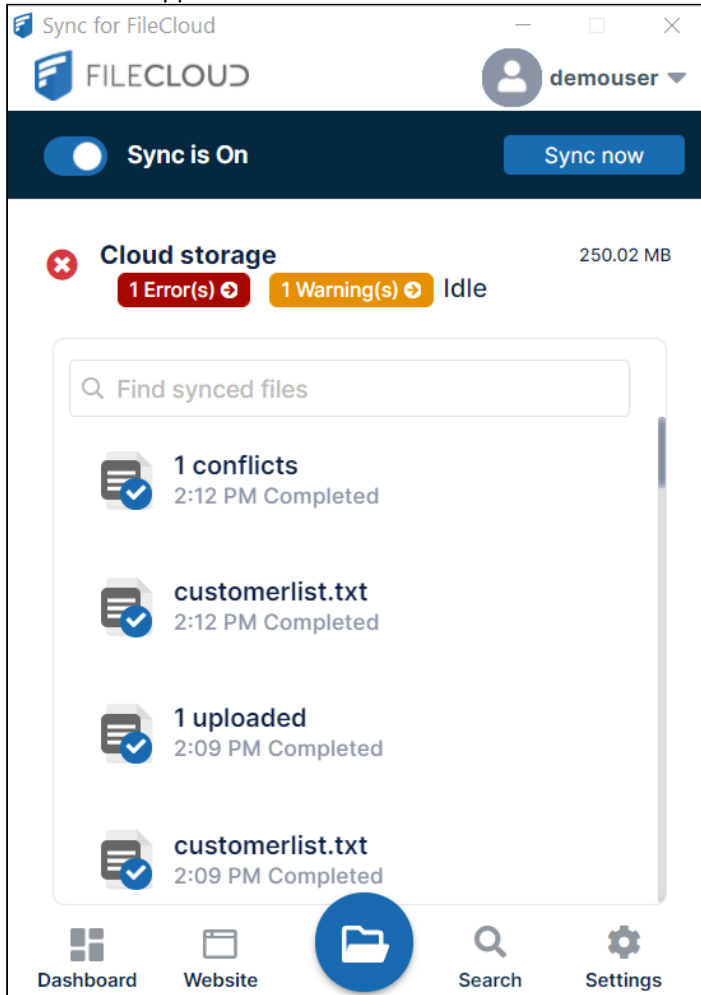
**Cloud storage.**

The screenshot shows the FileCloud Sync for FileCloud interface. The top bar includes the FileCloud logo and a user profile for 'demouser'. The left sidebar contains navigation options: Dashboard, Activity, Configuration, Cloud storage, Network Folders, Backup folders, Misc, Settings, and Help. The main content area displays the sync status. At the top, a 'Sync is On' toggle is active, and the status is 'Cloud storage: Idle'. A summary of sync issues is shown: '1 Error' (indicated by a red triangle), '1 files skipped' (indicated by a yellow triangle), and 'Please resolve all conflicts'. Below this, the 'Cloud storage' section is highlighted with a red error flag and shows '1 Error(s)' and '1 Warning(s)'. It includes a 'Sync now' button and details: 'My Files / Team / Shared Folders / Real-time Network Folders', 'Syncing everything', and '250.18 MB, 173 files'. The 'Network Folders' and 'Backup folders' sections are both disabled, each showing '0 folder(s) selected' and '0 B, 0 files'.

**Status flags in the mini-dashboard**

- If there were conflicts in the most recent sync operation, the mini-dashboard displays a red error flag with the number of conflicts.
- If there were skipped files in the most recent sync, the mini-dashboard displays a yellow flag with the number of skipped files.
- If the most recent sync was successful, the mini-dashboard displays a check in a blue circle before **Cloud storage**.  
Click the red or yellow flag in the mini-dashboard to go to the main dashboard's **Sync Activity** page to see the

conflicts or skipped files.




## Status flags in the system tray

You don't have to open one of the dashboards to check your sync status. Sync alerts you to problems with a status indicator that appears as a dot overlaying the icon in the system tray:



The color of the dot indicates the status of the most recent sync operation:

Icon	Color	Status
	Red	Error in Sync activity

	Yellow	Warning about Sync activity
	None	Sync was successful or no activity
	Black (white circle)	Sync Running

Click the Sync icon to open the mini-dashboard.

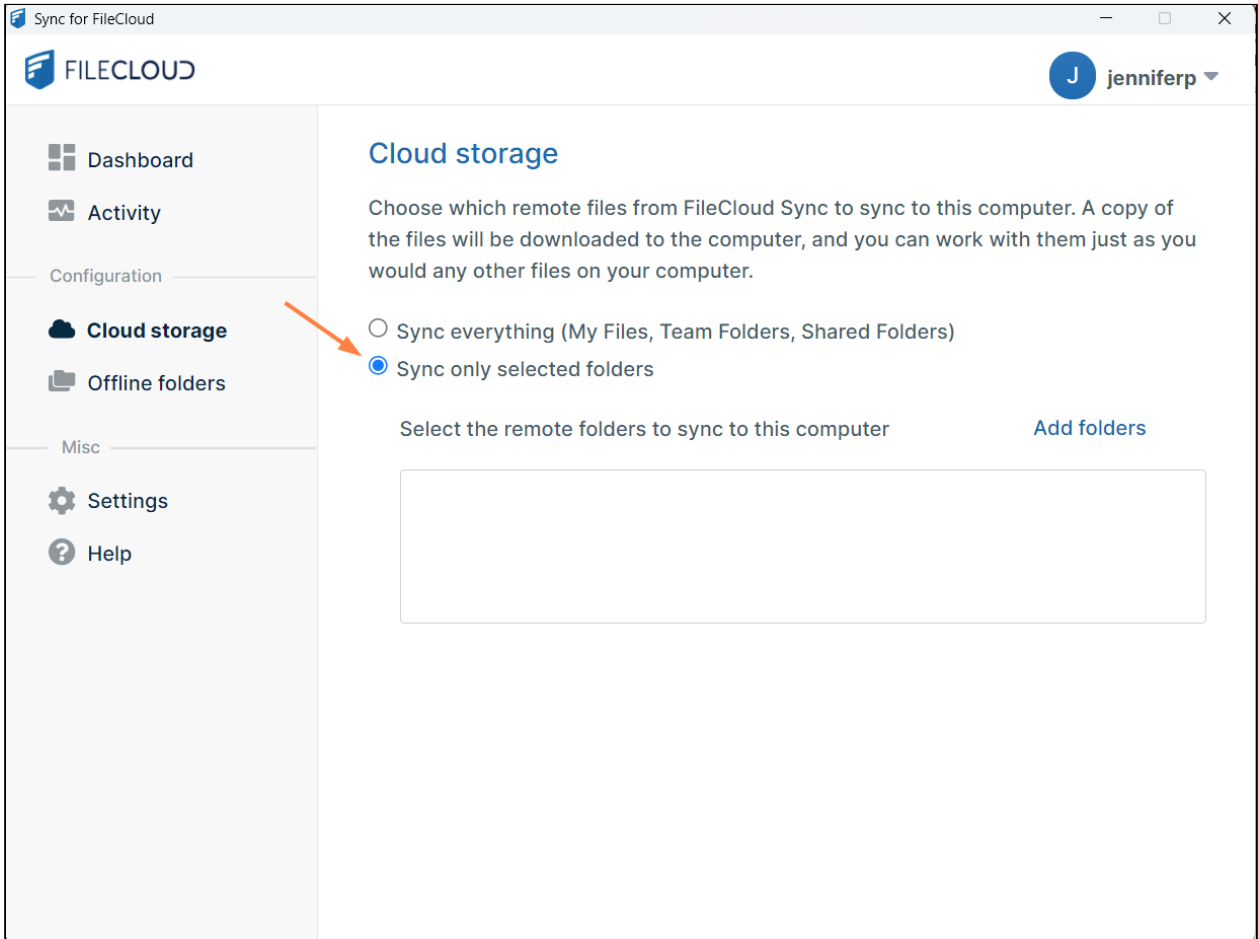
## Cloud Storage: Selective Folder Sync

### Limiting what gets Synced

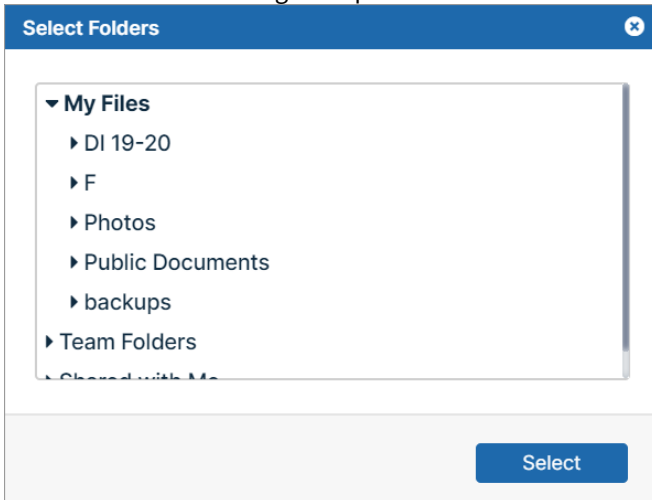
You can choose to limit which folders in cloud storage get synced. This is useful when you have terabytes of data in an account and you only want a few gigabytes of folders locally to conserve space.

#### To limit which folders are synced:

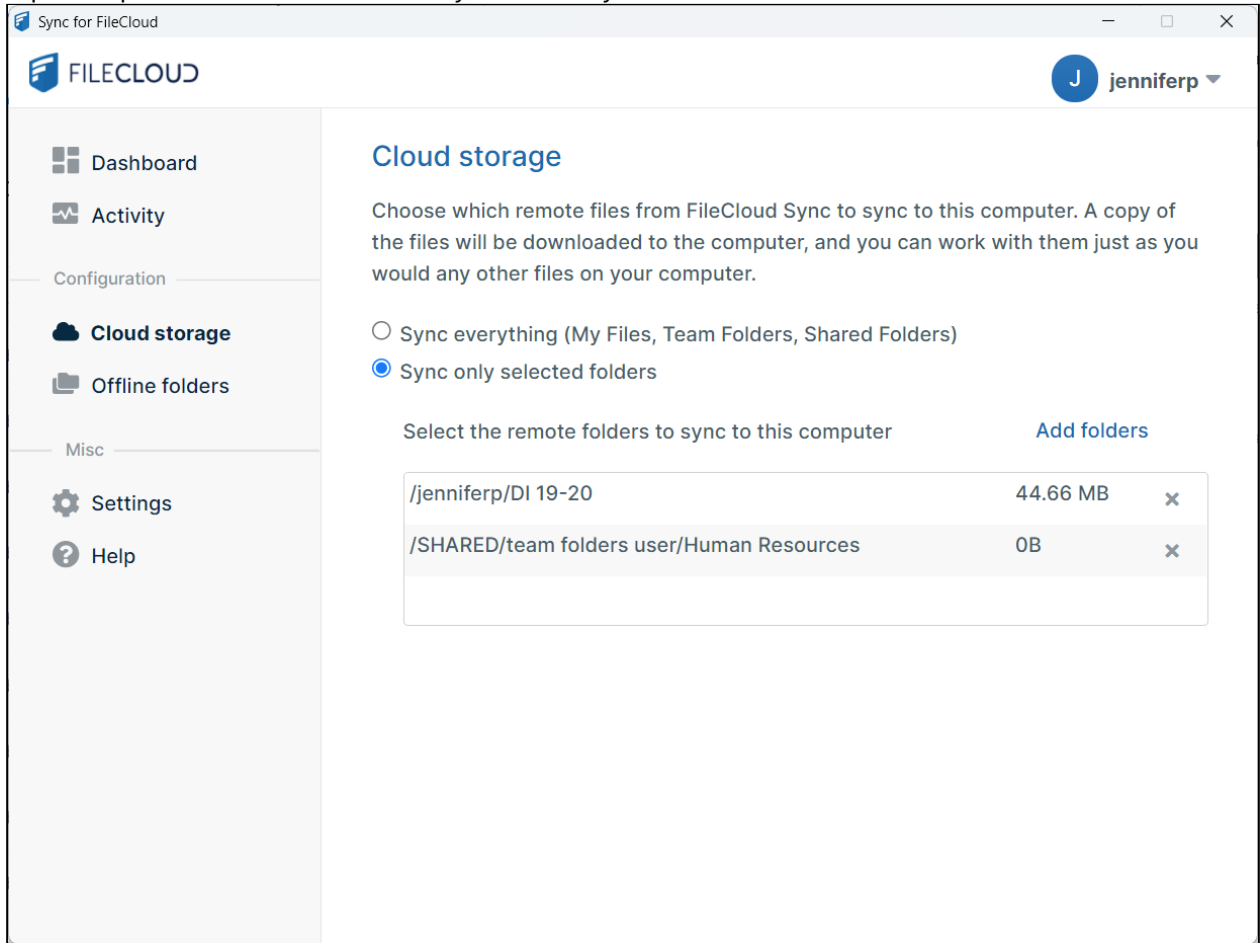
1. In your system tray, right-click on the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Dashboard**.
3. In the navigation pane of the dashboard, click **Cloud Storage**.  
The **Cloud Storage** window opens.
4. Select the radio button for **Sync only selected folders**.

5. Click **Add Folders**.

The **Select Folders** dialog box opens.

6. In **My Files**, **Team Folders**, or **Shared with Me**, navigate down to a folder that you want to sync, and choose **Select**.

7. Repeat steps 5 and 6 for each folder that you want to sync.



The screenshot shows the 'Sync for FileCloud' application window. The interface includes a sidebar with navigation options: Dashboard, Activity, Configuration, Cloud storage (selected), Offline folders, Misc, Settings, and Help. The main content area is titled 'Cloud storage' and contains the following text: 'Choose which remote files from FileCloud Sync to sync to this computer. A copy of the files will be downloaded to the computer, and you can work with them just as you would any other files on your computer.' Below this text are two radio button options: 'Sync everything (My Files, Team Folders, Shared Folders)' and 'Sync only selected folders' (which is selected). A section titled 'Select the remote folders to sync to this computer' includes an 'Add folders' button and a table of selected folders:

/jenniferp/DI 19-20	44.66 MB	x
/SHARED/team folders user/Human Resources	0B	x

**To view Sync details about your selected sync folders:**

- In the **Cloud Storage** window of the dashboard, click one of the selected folders. Below it, the details about the most recent sync are listed: the number of folders synced, the number of files



synced, total MB synced, and the number of files ignored (not synced).

**Cloud storage**

Choose which remote files from FileCloud Sync to sync to this computer. A copy of the files will be downloaded to the computer, and you can work with them just as you would any other files on your computer.

Sync everything (My Files, Team Folders, Shared Folders)  
 Sync only selected folders

Select the remote folders to sync to this computer Add folders

/jenniferp/DI 19-20	44.66 MB	x
/SHARED/team folders user/Human Resources	0B	x

Folder details

**Folder:** /jenniferp/DI 19-20

**Stats:** 1 folders, 20 files, 44.66 MB synced, 0 ignored

#### To remove a folder from selective sync:

- In the Cloud Storage window of the dashboard, click the x to the right of the folder that you want to remove, and confirm that you want to remove it.

#### To return to syncing all folders:

- In the Cloud Storage window of the dashboard, select the radio button for **Sync Everything**. The box and list of selected folders disappears. If you want to do a selective sync again, when you click the **Sync only selected folders** radio button, the box will be empty, and you must manually add the folders for selective sync again.

**i** When you switch from syncing all files to selected files, any existing files in your sync folder will not be removed automatically. If you want to remove them, you must remove them manually. This is to prevent accidental deletion of any user files.

## Selective Sync Behavior when Centralized Configuration is set

When the Sync app behavior is controlled centrally by the administrator (through User Policy → Device Configuration settings in the admin portal), users of the Sync app cannot add or remove selective sync folders **unless they are given permission to override central configuration**.

When a user tries to make any changes, the following message is displayed - "Centralized Configuration is being applied. Settings cannot be changed. Please contact your administrator for assistance."

## Advanced Offline Sync mode

**i** This is an advanced feature not meant for general use, please enable and use only if there is something specific that you need to accomplish.

**⚠** For **Local to Remote** syncing to be effective, the **Allow Users to Backup** setting must be enabled in the admin portal. For admins, the **Allow Users to Backup** setting is located in the admin portal at **Settings > Endpoint Backup**.

Some users want more granular control over which local folders are synced to which remote folders and in which direction.

There is an "advanced offline sync mode" in sync that allows control of such options.

### To enable advanced mode:

1. Exit Sync.
2. Open syncclientconfig.xml, at:

Operating System	Path
Windows	%APPDATA%\FileCloudSync\syncclientconfig.xml
Mac OSX	{HomeDir}\FileCloudSync\syncclientconfig.xml
Linux	{HomeDir}\FileCloudSync\syncclientconfig.xml

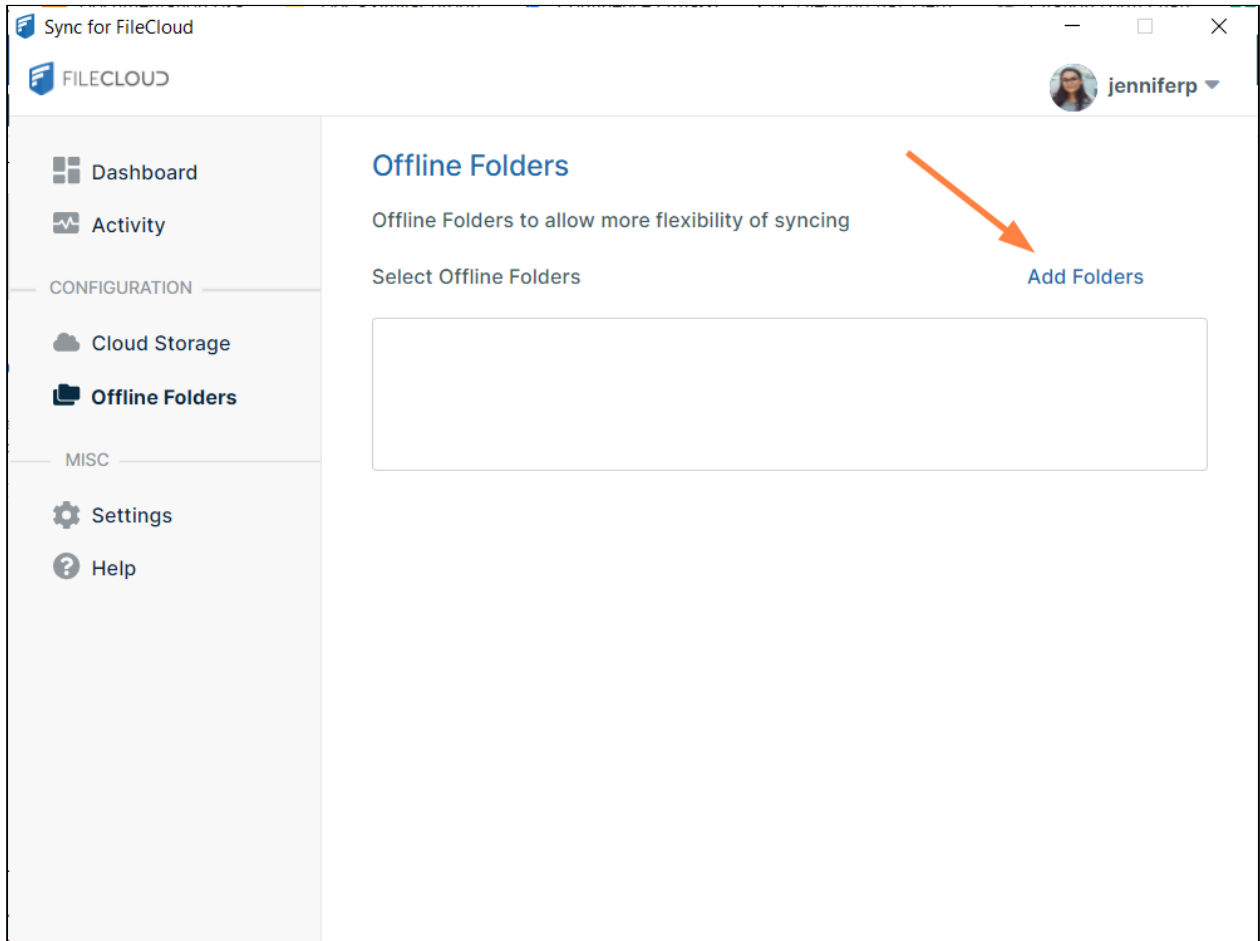
3. Add the following entry:

```
<rowentry>
  <name>advancedoffline</name>
  <type>bool</type>
  <value>1</value>
</rowentry>
```

4. Restart Sync.

To add a folder in advanced mode:

1. In the system tray, right click the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Dashboard**.
3. In the navigation panel of the dashboard, click **Offline Folders**.
4. Click **Add Folders**.



The **Add New Offline Folder** dialog box opens.

5. In **Remote Folder**, select the location to sync to.

6. In **Local Folder**, select the location to sync from.

The screenshot shows a dialog box titled "Add New Offline Folder". It contains the following fields and controls:

- Remote folder:** A text input field containing "/EXTERNAL/Misc" and a blue "Select" button.
- Local Folder:** A text input field containing "C:\Misc" and a blue "Select" button.
- Schedule:** A dropdown menu currently showing "Manual".
- Mode:** A dropdown menu currently showing "Sync".
- At the bottom, there are two buttons: "Add Folder" and "Cancel".

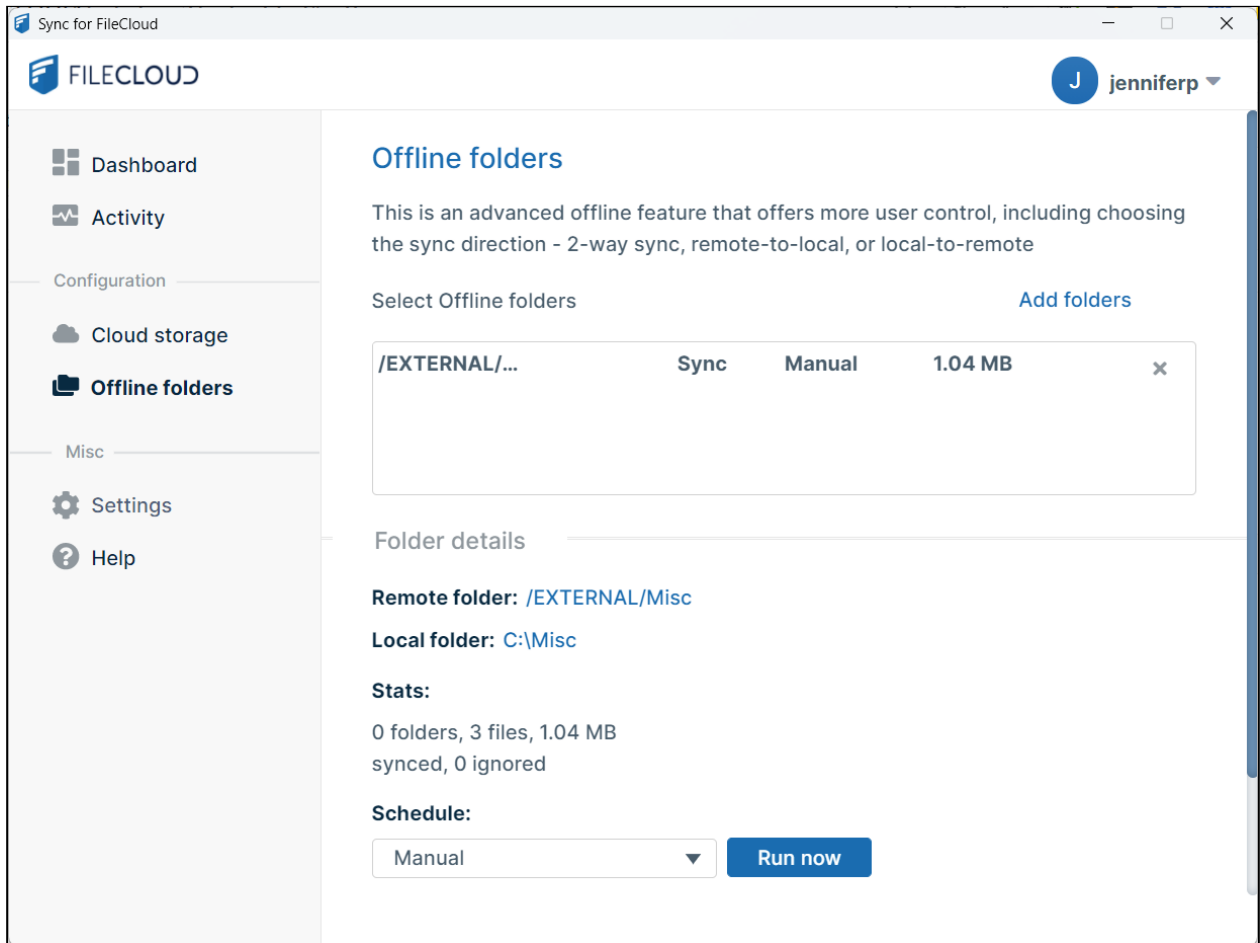
7. In **Schedule**, select one of the following:

- **Manual** - Choose this to run Sync manually instead of automatically on a schedule.
- a sync frequency in minutes or hours - Choose one of these to specify how frequently Sync should run automatically.
- **Choose a different schedule** - Choose this to run Sync daily or on specified weekdays at a specific time. The following dialog box, where you can specify your custom schedule, opens:

The screenshot shows a dialog box titled "Add New Offline Folder" with the following configuration:

- Sync:** Two radio buttons are present: "Every Day" (unselected) and "Choose specific days of the week" (selected).
- Days of the week:** A row of checkboxes for Sun, Mon, Tue, Wed, Thurs, Fri, and Sat. The "Mon" and "Fri" checkboxes are checked.
- Start Time:** Three dropdown menus showing "02", "00", and "AM".
- At the bottom, there are two buttons: "Save" and "Cancel".

8. In **Mode**, choose one of the following:
- **Sync** - 2 way sync mode. Files from local are uploaded to remote server. Remote changes are also synced to local.
  - **Local to Remote** - One way sync, where only changes from local are synced to remote server. No changes are synced from remote to local. Note that files deleted locally are not deleted remotely. Note:
  - **Remote to Local** - One way sync, where only changes from remote are synced to local. No changes are synced from local to remote.
9. Click **Add Folder**.  
Now this location will start working in the advanced offline mode configured.



**Offline folders**

This is an advanced offline feature that offers more user control, including choosing the sync direction - 2-way sync, remote-to-local, or local-to-remote

Select Offline folders Add folders

/EXTERNAL/...	Sync	Manual	1.04 MB	x
---------------	------	--------	---------	---


**Folder details**

**Remote folder:** /EXTERNAL/Misc

**Local folder:** C:\Misc

**Stats:**  
0 folders, 3 files, 1.04 MB synced, 0 ignored

**Schedule:**  
Manual Run now

-  When advanced offline sync mode is enabled:
- The **backup option** is not available unless the **Mode** is set to **Local to Remote**.
  - For remote to local syncing (**Mode** is set to **Remote to Local**), the modified dates of local folders are updated to the date of syncing, but the server folders keep their original modified dates. The modified dates of local files retain the value of their modified dates on the server.

## Backing Up Files

In addition to syncing files automatically, you can also back up specific folders in your Windows, Mac or Linux Desktop to FileCloud for safekeeping.

Folders selected for backup are automatically backed up on a schedule selected by the user.



 Configure which files are backed up



➔ Configure the backup schedule



➔ View and restore backups

## Selecting Files to Backup

**i** Important Note: Backup must be enabled by your FileCloud administrator to allow you to back up your computer's files and folders. If your administrator has disabled backup, you will not see the Backup link in the navigation pane of the main dashboard.

The following procedure explains how to add or modify file and folder backup in Sync after you have logged in. To set up backup when you log in to Sync, see [Step 4 Backup Folders](#).

To select the files you want backed up:

1. Launch FileCloud Sync by right-clicking on the icon in your system tray and then selecting **Open**.
2. In the mini-dashboard, click **Dashboard**.
3. In the navigation pane of the main dashboard, click **Backups**.

Sync for FileCloud

FILECLOUD jenniferp

Dashboard

Activity

CONFIGURATION

Cloud Storage

Network Folders

Backups

MISC

Settings

Help

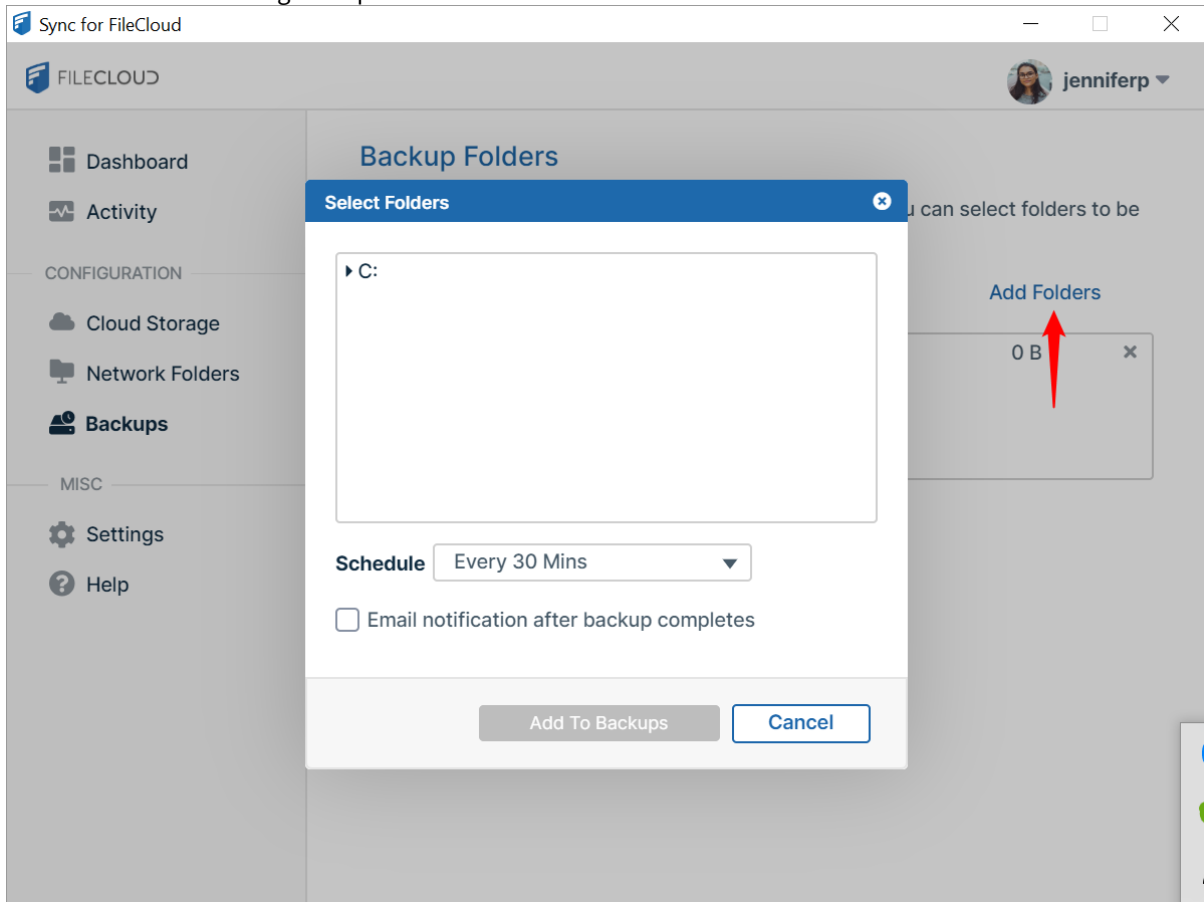
### Backup Folders

If your administrator has enabled backups to FileCloud, you can select folders to be backed up on a regular basis.

Select Folder to Back Up [Add Folders](#)

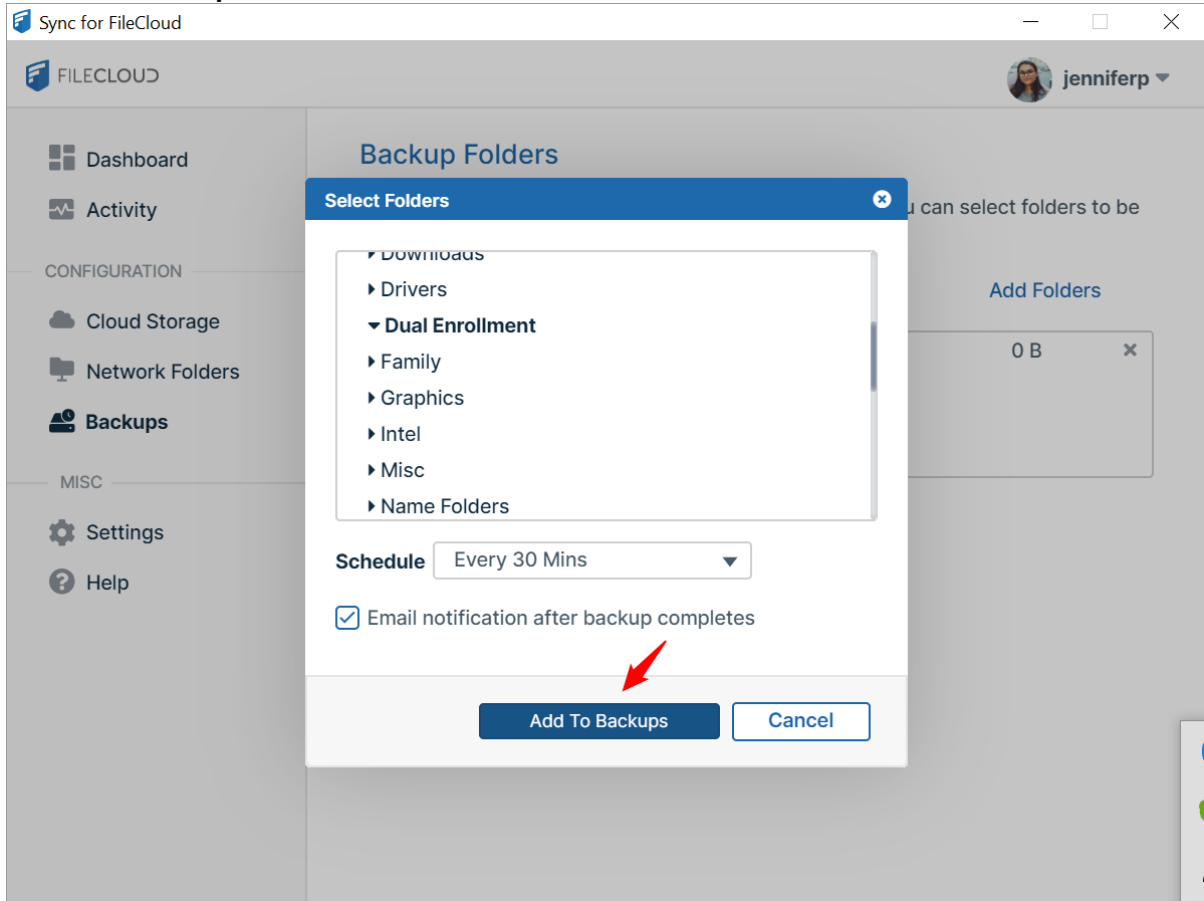
C:\Custom Images	Every 30 Mins	0 B	x
------------------	---------------	-----	---

4. Click **Add Folders**.  
The **Select Folders** dialog box opens.



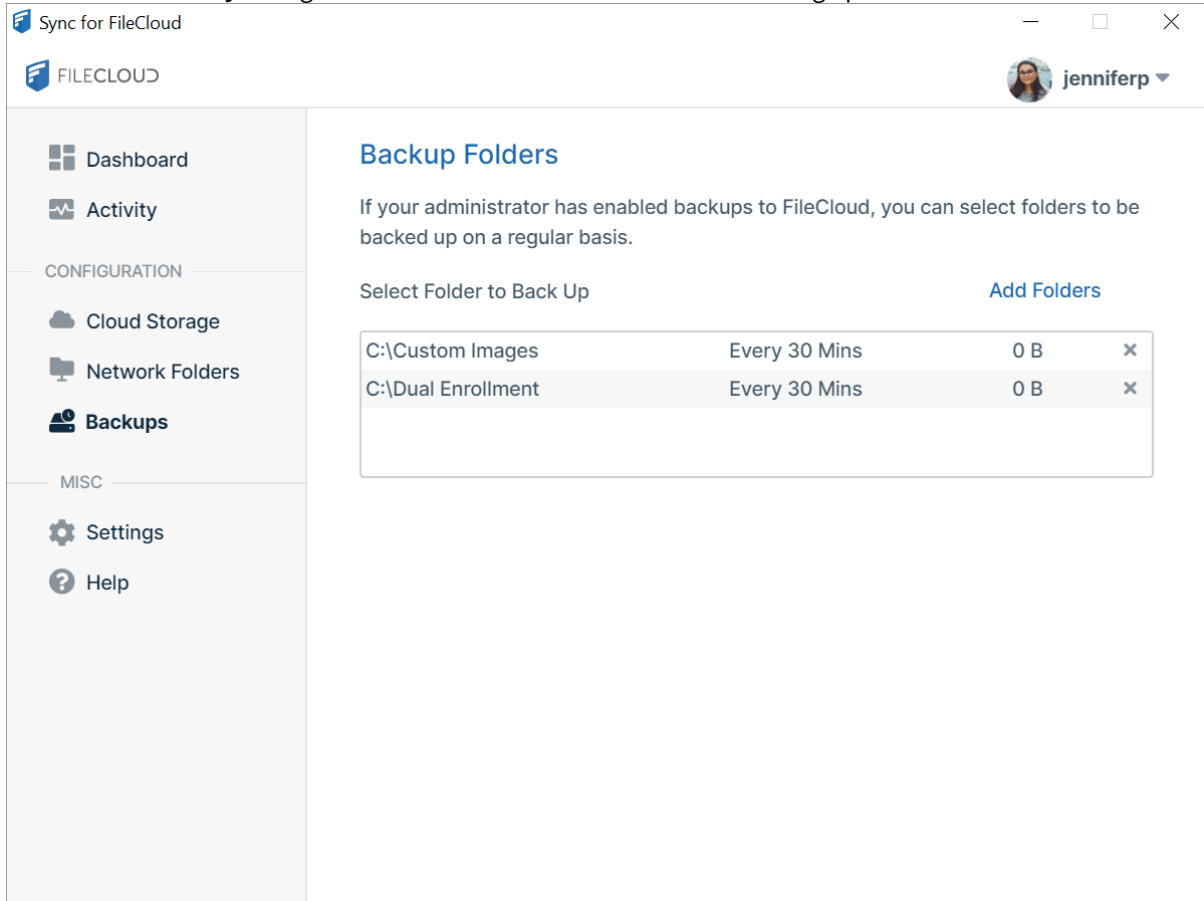
5. Expand the directory to the folder that you want to back up.
6. In **Schedule**, choose how often you want to back up the folder.
7. Check **Email notification after backup completes** if you want to be notified each time the folders in the directory are backed up.

8. Click **Add to Backups**.





The **Select Directory** dialog box closes and the folder is added for backing up.



## Configure the Backup Schedule

**i** Important Note: Backup must be allowed by your FileCloud administrator. If your administrator has disabled backup, you will not have the option to set up backup.

By default, folders selected for backup are backed up every 30 minutes.

To change the schedule:

1. Launch FileCloud Sync by right-clicking on the icon in your system tray and then selecting **Open**.
2. In the mini-dashboard, click **Dashboard**.
3. In the navigation pane of the main dashboard, click **Backups**.

4. Select a folder path in the box.  
Below it, folder details including its schedule are displayed.

Sync for FileCloud

FILECLOUD jenniferp

Dashboard

Activity

CONFIGURATION

Cloud Storage

Network Folders

Backups

MISC

Settings

Help

### Backup Folders

If your administrator has enabled backups to FileCloud, you can select folders to be backed up on a regular basis.

Select Folder to Back Up [Add Folders](#)

C:\Custom Images	Every 30 Mins	0 B	x
C:\Dual Enrollment	Every 30 Mins	0 B	x

#### Folder Details

**Folder:** C:\Custom Images

**Stats:** 0 folders, 0 files, 0 B synced, 0 ignored

**Schedule:** Every 30 Mins [Run Now](#)

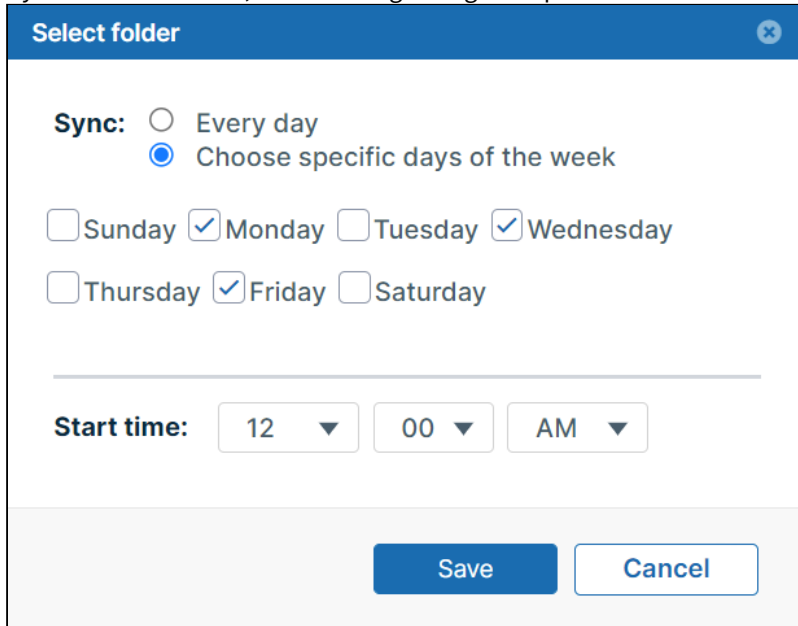
Last Run: 2020-10-21 13:35:54

Time Taken for Last Run: 1 secs

Email Notification after backup completes

5. In **Schedule**, choose a new time interval or **Manual** or **Custom** (the last two options in the drop-down list). If you choose a new time interval, sync runs immediately after you save the setting, and at the specified interval from that time on.

If you choose **Custom**, the following dialog box opens.



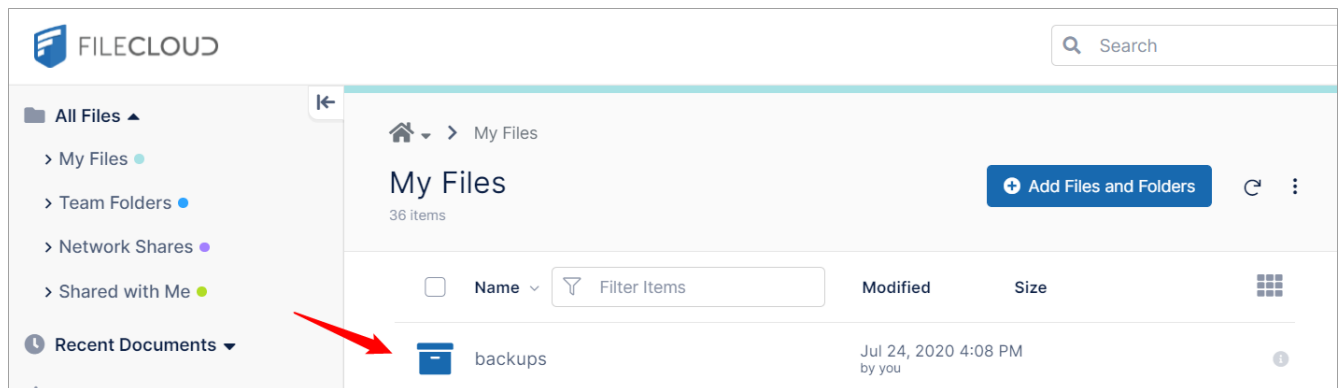
- Set up your custom schedule. You can only choose one **Start Time** that the custom backup runs.
- Click **Save**.
- To run a backup now, click **Run Now**.

## Viewing and Restoring Backups

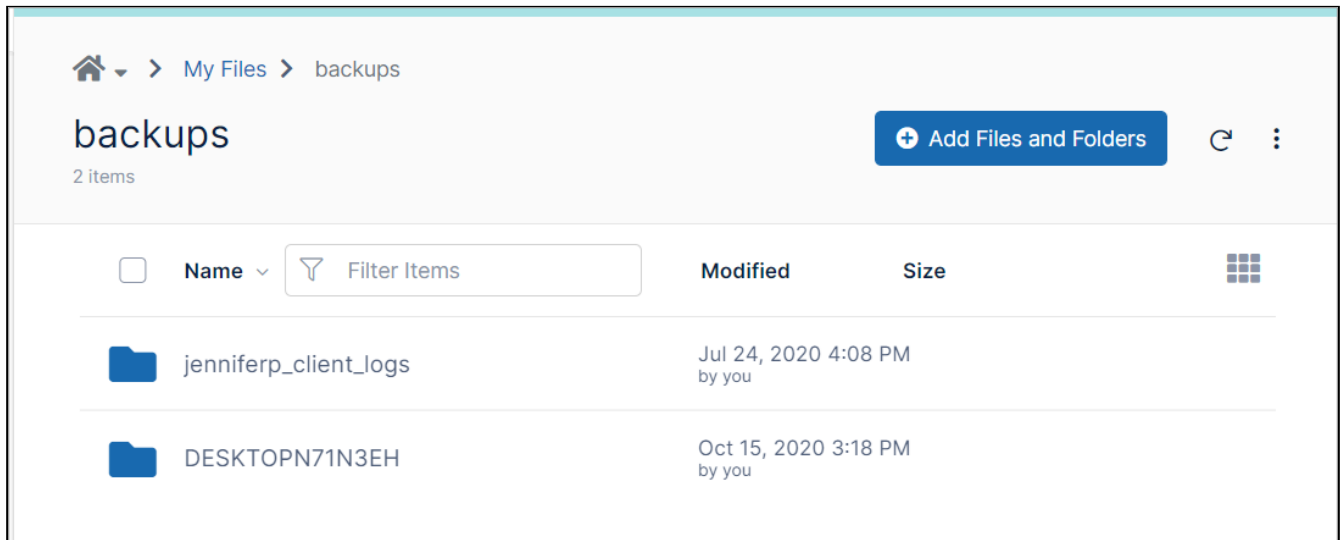
### Viewing Backups

Files on your computer are backed up to your FileCloud **My Files/backups** folder.

You can view the backups folder by opening FileCloud in your web browser and opening your **My Files/backups** folder.



The backups folder includes a sub-folder for each device that is backed up to FileCloud. Each device folder includes a sub-folder for each folder backed up from that device.



 Note that backed up files are included in the total storage allocated to you in FileCloud.

## Restore Backups

You can restore backups from the FileCloud server by downloading backed up files using the web portal, FileCloud Drive or the WebDAV app.

## Old Versions of Files in Backup

When you edit and modify files that are being backed up, new versions will be uploaded to FileCloud, and it will create a new version of that file. So it is possible to roll back to a previous version.

## Deleted Files and Folders in Backup

When files and folders are deleted in a folder that is backed up, they are not removed from the FileCloud backup folder. So if files or folders are deleted accidentally, the backup files are not removed. If you want to remove backed up files or folders you must delete them directly from the FileCloud web portal.

## Globally Backing Up User Files and Folders

**This topic is for use by admins.**

You can configure Sync backup so that specific local paths on all users' computers and devices are backed up. This ensures that certain user content, including configuration files, is always backed up and easy to restore.

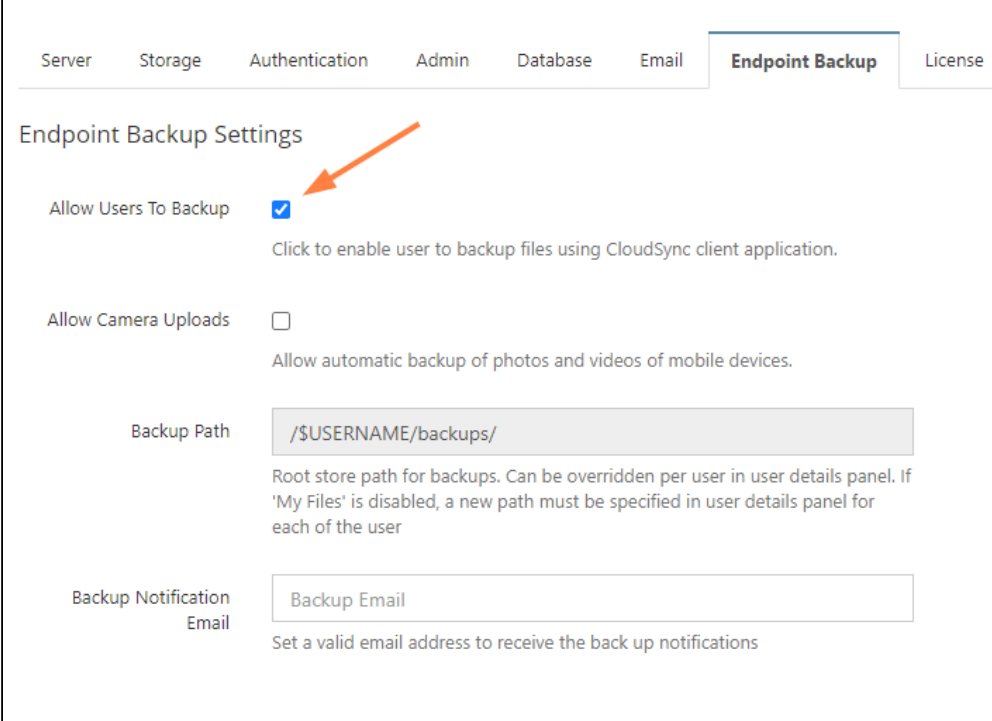
### Requirements:

- Endpoint Backup must be enabled for FileCloud Sync from the Admin Portal.
- FileCloud Sync must be installed on the users' computers and **Remote Management** must be enabled.

- The Sync users' policy in the Admin portal must include this custom device configuration for Sync.

### To configure Sync to globally back up users' files and folders:

1. Enable **Endpoint Backup** for FileCloud Sync from the Admin Portal.
  - a. In the Admin portal, navigate to **Settings > Endpoint Backup**.
  - b. Enable the **Allow Users To Backup** option and click **Save**.



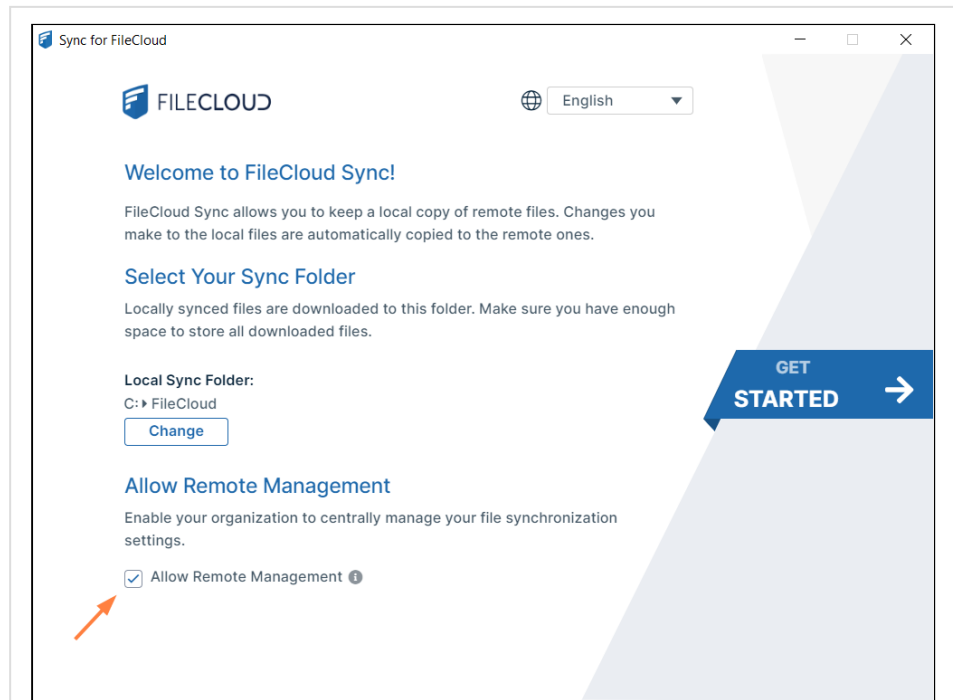
The screenshot shows the 'Endpoint Backup Settings' page in the FileCloud Admin Portal. The navigation bar at the top includes 'Server', 'Storage', 'Authentication', 'Admin', 'Database', 'Email', 'Endpoint Backup', and 'License'. The 'Endpoint Backup' tab is active. The settings are as follows:

- Allow Users To Backup:** Checked (indicated by an orange arrow). Description: Click to enable user to backup files using CloudSync client application.
- Allow Camera Uploads:** Unchecked. Description: Allow automatic backup of photos and videos of mobile devices.
- Backup Path:** /\$USERNAME/backups/. Description: Root store path for backups. Can be overridden per user in user details panel. If 'My Files' is disabled, a new path must be specified in user details panel for each of the user.
- Backup Notification Email:** Backup Email. Description: Set a valid email address to receive the back up notifications.

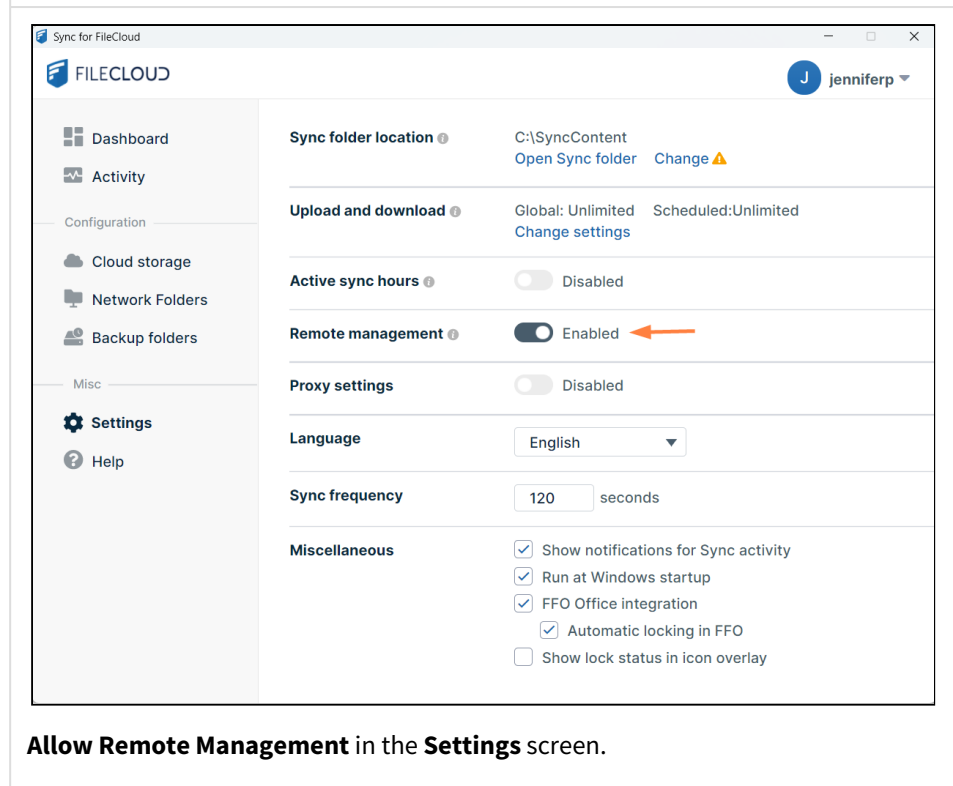
### 2. Install FileCloud Sync and enable Remote Management

For the device configurations set up in policies to take effect, enable remote management in FileCloud Sync.

- a. To enable remote management:
  - either:
    - Have users manually enable the **Remote Management** option in the FileCloud Sync App. They can either do this on the **Get Started** screen when they log in or in the **Settings** screen after they log in.



**Allow Remote Management** in the **Get Started** screen.



**Allow Remote Management** in the **Settings** screen.

or:

- Enable the remote management setting for a mass deployment (set **allowcentralmgmt** to **1**). See [Mass Deployment - Default Configuration Support](#) for help with the configuration. Mass deployment registry entries must be created before FileCloud Sync is initialized in the users' local machines or the configuration in the registry will not take effect.

**i** You may set a registry key to hide the **Allow Remote Management** and **Remote Management** settings in Sync so that users cannot disable remote management. See [Device Configuration XML For Sync](#) for instructions.

3. In the policy used by Sync users, set a default device configuration for FileCloud Sync. For help creating the XML, see the [Device Configuration XML](#) documentation for Sync.
  - a. In the Admin portal, navigate to **Settings > Policies** and edit the Sync users' policy.

Server Storage Authentication Admin Database Email Endpoint Backup License **Policies** SSO Content Search Web Edit

Third Party Integrations ServerLink Misc Reset

Team Folders

Manage Policy + New policy

Filter

Policy Name	User Count	Group Count	DEFAULT	Actions
TEAM FOLDER POLICY	1	0	<input type="checkbox"/>	
Global Default Policy	0	0	<input checked="" type="checkbox"/>	

- b. Go to the **Device Configuration** tab and enter the configuration in XML format.

Policy Settings - Global Default Policy

**Note:** Some policy settings will not be applicable for Guest and Limited users.

Manage Device Configuration

Client Configuration

```
<xml>
<cloudsync>
<allowuserconfigforbackup>0</allowuserconfigforbackup>
<offline_folder_count>7</offline_folder_count>
<offline_folder_1>C:\Users\${USER}\AppData\Roaming\Microsoft\Outlook\${USERID}\backups\${USERID}\Outlook\1\30m\1\0</offline_folder_1>
<offline_folder_2>C:\Users\${USER}\Pictures\${USERID}\backups\${USERID}\Pictures\1\30m\1\0</offline_folder_2>
<offline_folder_3>C:\Users\${USER}\Desktop\${USERID}\backups\${USERID}\Des
```

Save Reset Close

Below is a sample script to use:

```

<xml>
<cloudsync>
<allowuserconfigforbackup>0</allowuserconfigforbackup>
<offline_folder_count>7</offline_folder_count>
<offline_folder_1>C:\Users\${USER}\AppData\Roaming\Microsoft\Outlook|/${
${USERID}/backups/${USERID}/Outlook|1|30m|1|0|0</offline_folder_1>
<offline_folder_2>C:\Users\${USER}\Pictures|/${USERID}/backups/${USERID}/
Pictures|1|30m|1|0|0</offline_folder_2>
<offline_folder_3>C:\Users\${USER}\Desktop|/${USERID}/backups/${USERID}/
Desktop|1|30m|1|0|0</offline_folder_3>
<offline_folder_4>C:\Users\${USER}\Music|/${USERID}/backups/${USERID}/Music|1
|30m|1|0|0</offline_folder_4>
<offline_folder_5>C:\Users\${USER}\Favorites|/${USERID}/backups/${USERID}/
Favorites|1|30m|1|0|0</offline_folder_5>
<offline_folder_6>C:\Users\${USER}\AppData\Roaming\Microsoft\Templates|/${
${USERID}/backups/${USERID}/Office_Templates|1|30m|1|0|0</offline_folder_6>
<offline_folder_7>C:\Users\${USER}\Documents|/${USERID}/backups/${USERID}/
Documents|1|30m|1|0|0</offline_folder_7>
</cloudsync>
</xml>


```


Notice that the first parameter in Line 5 of the XML above is the local path of the user's computer. The lines after it are the other local directories that need to be included in the Sync Backup.

c. Save the configuration.

Now, the folders specified in the configuration settings will be backed up for all Sync users when a Sync backup runs.

## Managing Files in File Explorer

 The remote file browser functionality is available in FileCloud Server version 13.0 and later. The ability to access details and metadata for a file directly in Sync is available in FileCloud Server version 18.2 and later.

 If you are using FileCloud Sync with Mac OSX, you must enable the FileCloudSync extension in your system to be able to view right-click options in explorer. See [Mac OSX Finder Right-Click Extension](#) for help.




You can use FileCloud Sync to synchronize your files with the FileCloud Server.

FileCloud Sync appears as a folder in a file explorer window in Windows Explorer or Mac OSX Finder. It's sub-folders are **My Files**, **Network Folders**, **Team Folders**, and **Shared with Me**.

Sync is an alternative to using the user portal to access files stored on the FileCloud Server. With Sync, the files are stored locally, and you work on them locally.



## What do you want to do?

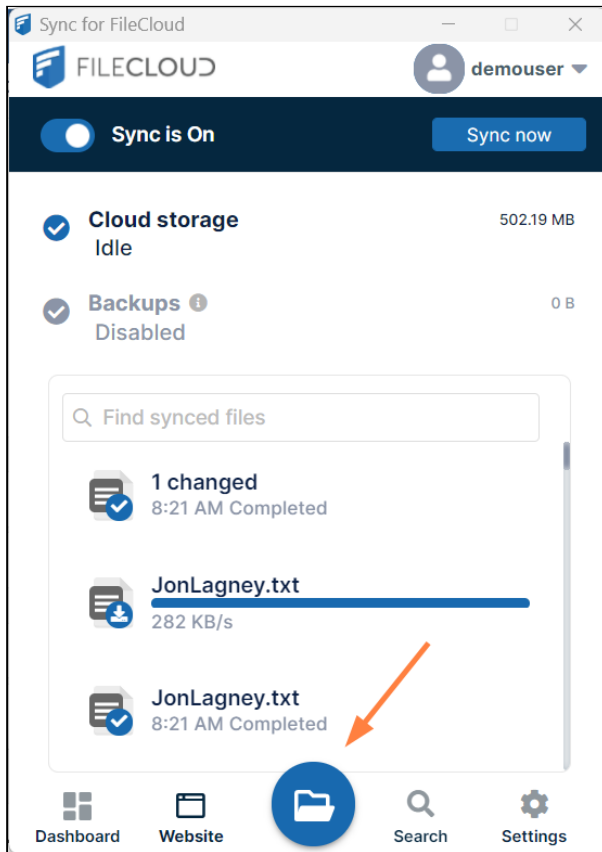
 <p>Locate and Manage Files</p>	<ul style="list-style-type: none"> <li>➔ Browse my files</li> <li>➔ Search for a folder</li> <li>➔ Delete a file or folder</li> <li>➔ Lock and Unlock Folders</li> </ul>
 <p>Share Files and Folders</p>	<ul style="list-style-type: none"> <li>➔ Share Files</li> <li>➔ Share a FileCloud Link</li> <li>➔ Create Direct FileCloud Link</li> </ul>
 <p>Work with Files</p>	<ul style="list-style-type: none"> <li>➔ View or add comments about a file</li> <li>➔ View or add metadata to a file</li> <li>➔ Download a File</li> <li>➔ Upload a File</li> <li>➔ Perform file explorer actions on Sync files</li> </ul>

## Browse My Sync Files

FileCloud Sync appears as a mapped drive in a file explorer window in Windows Explorer and Mac OSX Finder.

### To open Sync in file explorer

1. In your system tray, right-click on the Sync icon and choose **Open**.
2. At the bottom of the mini-dashboard, click the folder icon.



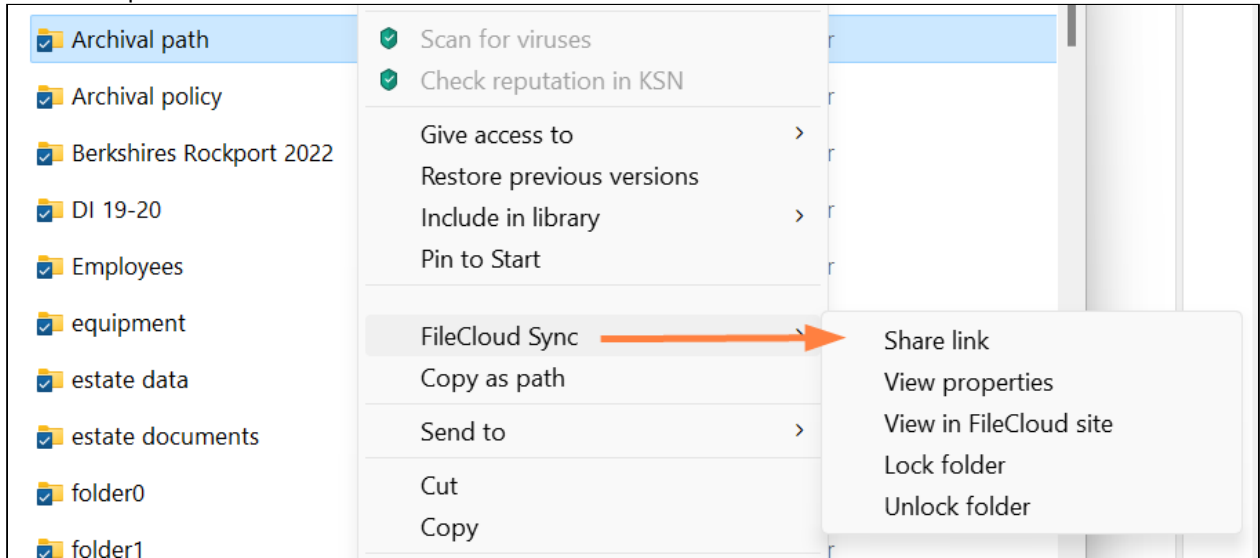
Your Sync folder in file explorer opens. It has the same folders for My Files, Network Folders, and Shared with Me that appear in the FileCloud user portal.



Navigate to files and sub-folders as you do for any other files and folders in your explorer window.

**To view FileCloud options:**

- Right-click on a file or folder and choose **Show more options**, then hover over FileCloud Sync to view the FileCloud options.



## Sharing Files in Sync

File sharing allows you to provide public or private access to files stored in FileCloud and saved in your Sync folders.

While files can easily be shared by emailing them to someone, sharing files using Sync allows you to:

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

You can share a file in many different ways.

	Requires a FileCloud Account	Set Permissions	Set Options	Share with Everyone	Share with a Specific User
Public	✗ Anyone with the link can access	<ul style="list-style-type: none"> <li>✓ View</li> <li>✓ Download</li> </ul>	<ul style="list-style-type: none"> <li>✓ Share Name</li> <li>✓ Expiration</li> <li>✓ Restrict Downloads</li> <li>✓ Notifications</li> <li>✓ Require Password</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> </ul>
Private	<ul style="list-style-type: none"> <li>✓ Invite those without an account to create one</li> </ul>	<ul style="list-style-type: none"> <li>✓ View</li> <li>✓ Download</li> <li>✓ Share</li> </ul>	<ul style="list-style-type: none"> <li>✓ Share Name</li> <li>✓ Expiration</li> <li>✓ Notifications</li> </ul>	<ul style="list-style-type: none"> <li>✗ Add Groups to share with multiple users at once</li> </ul>	<ul style="list-style-type: none"> <li>✓ With a FileCloud account</li> </ul>

To create a share or manage it, select the **Share Link** option from the right-click menu.

💡 If the file is already being shared, click the **Share Link** option to edit or manage the share.

The **Share link** window opens. The share is public unless you make it private. You can copy the link to the share and send it to the person or people you want to share with.

Share link for calculations.txt ✕

**Your share has been created**

**Share link**

Modify link

⌂
↗
✉

Copy link  
⌂

Open link  
↗

Email link  
✉

🌐 This share is **Public**  
Anyone with link can view. [Change](#)

Remove share
Share options
OK

## What do you want to do?



Share Files Publicly *No FileCloud account required.*



Share Files Privately *FileCloud account required.*

## Sharing Files Publicly in Sync

You can share a file so that anyone can access the file 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, 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 privately](#).

When you share a file:

- A **Share link** window opens to provide the link. By default the file can be accessed by external users.
- You can click **Change** or **Share options** to set sharing restrictions.
- You can edit and send an email inviting new or existing users to access the share.

Create a public share:

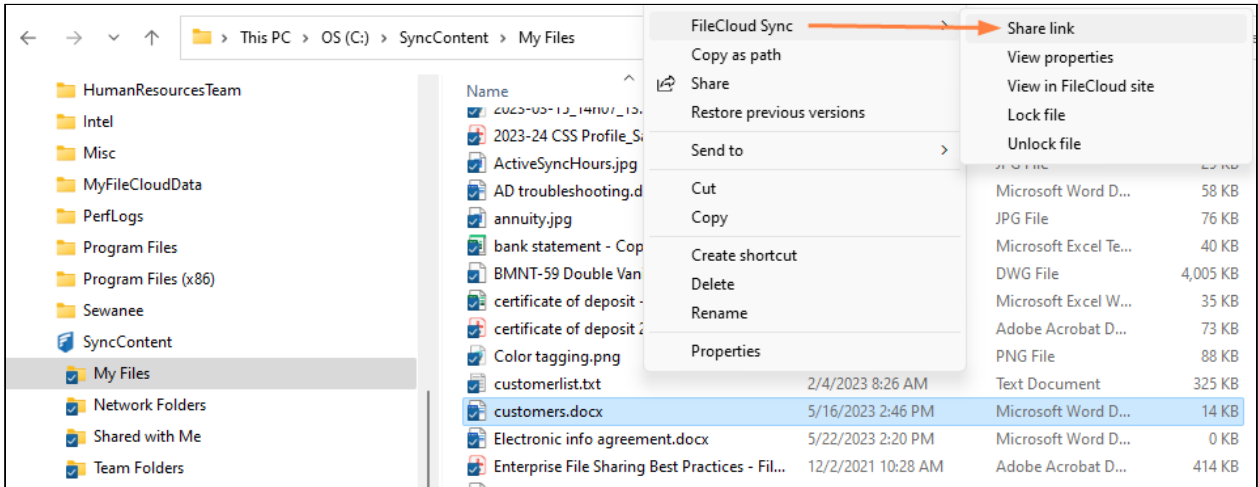
In your system tray, right-click the Sync icon and choose **Open**.

1. At the bottom of the mini-dashboard, click the folder icon.

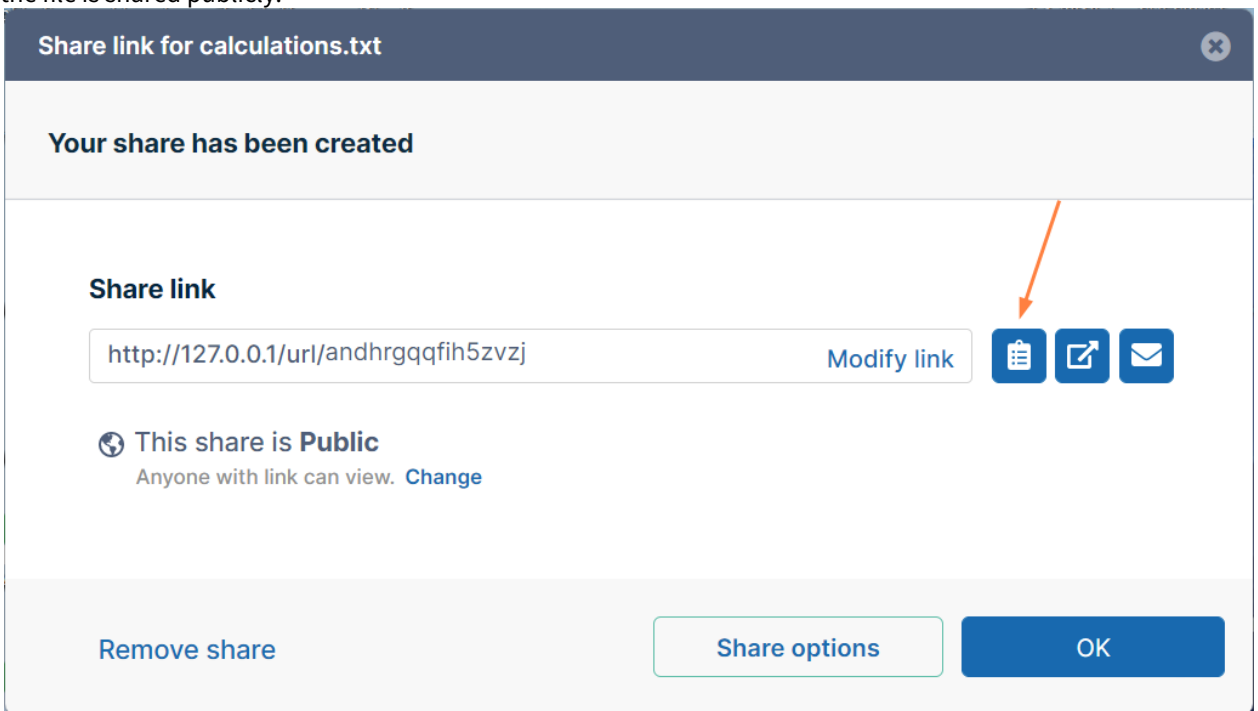
Your Sync folder in file explorer opens.

Name	Status	Date modified	Type
FileCloud			
My Files	<input checked="" type="checkbox"/>	10/15/2020 3:37 PM	File folder
Network Folders	<input checked="" type="checkbox"/>	9/9/2020 3:39 PM	File folder
Shared with Me	<input checked="" type="checkbox"/>	6/15/2020 9:59 AM	File folder
Team Folders	<input checked="" type="checkbox"/>	6/15/2020 9:59 AM	File folder

2. Navigate to the file or folder you want to share, then right-click on it and choose **Show More Options**. In the next menu choose **FileCloud Sync > Share Link**.



The **Share link** dialog box opens. Unless you click the **Change** or **Share options** button and change the settings, the file is shared publicly.

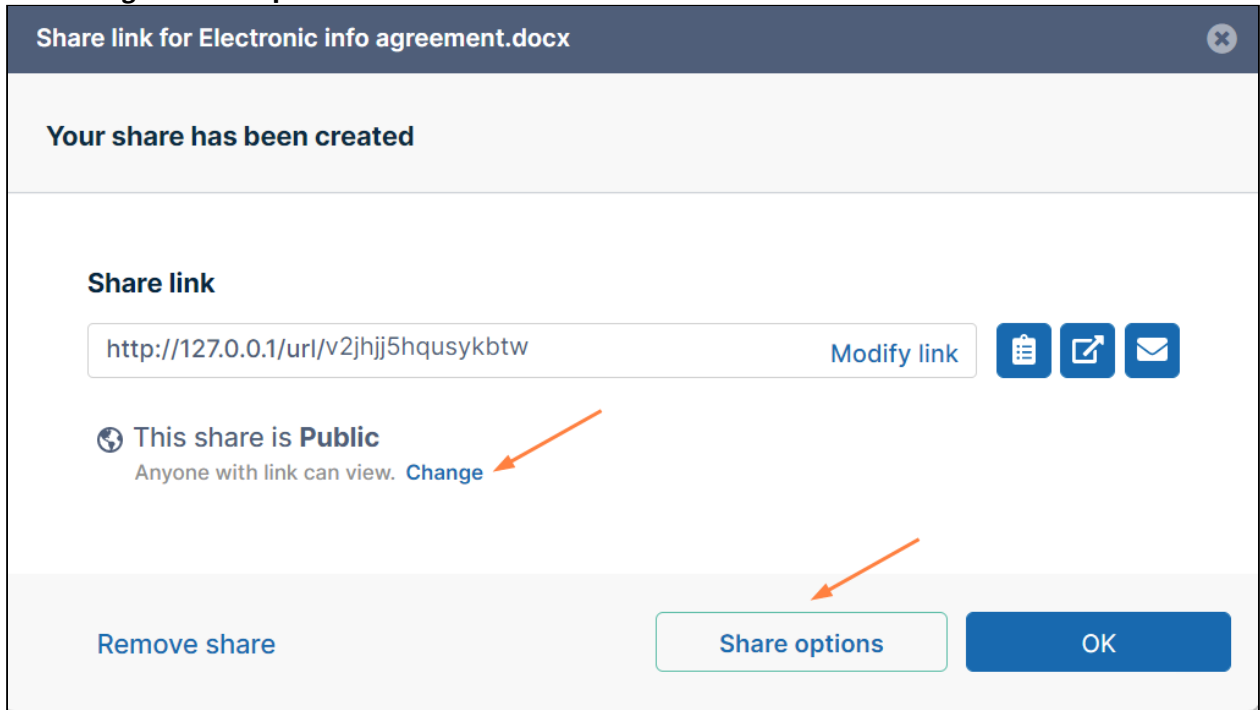


3. Click the **Copy Link** button, and then paste the link in an email or text message and send it to users to give them access to the file.

#### Create a public share and add share options




1. In your system tray, right-click the Sync icon and choose **Open**.
2. At the bottom of the mini-dashboard, click the folder icon.  
Your Sync folder in file explorer opens.

3. Navigate to the file or folder you want to share, then right-click on it and choose **Show More Options**. In the next menu choose **FileCloud Sync > Share Link**. The **Share link** dialog box opens.
4. Click **Change** or **Share options**.



The window expands and shows share options.

**Share link for Electronic info agreement.docx**

**Share link**  
 Modify link   

**Shared file**  
 My Files > Electronic info agreement.docx

**Share options** | Share history

**Share name:** EKNiTV7ATUuYfZKA Change

**Expires:** Never expires

**Max number of downloads:** No Restrictions

**Send email notifications:** Yes

**Sharing permissions:**

- Allow anyone with link
- Allow anyone with link and password
- Allow selected users and/or groups

Remove share OK

5. Change any of the options. See [Sync: Share options for files](#) for information about these settings.
6. Click **OK**.

## Sharing Files Privately in Sync

When you share a file privately, you share it only with existing FileCloud users or groups, but you can invite a new user to create a FileCloud account and then access the share.

Sharing files privately:

- Provides more security than sharing files publicly.
- Is useful when you only have a small number of people you want to share with.
- Requires the user to log in with a FileCloud account to access the file on the User Portal.

Users have the following permission options in private shares:

Permission	Description
Read permitted	Read permission allows users to view, browse and download files. Removing read permission removes the user from the share completely.



Permission	Description
Download permitted	Download permission allows the user to download and save the file.
Share permitted	Share permission allows the user to share your file with other users. Share permission can be provided only if read and download permission are already provided.

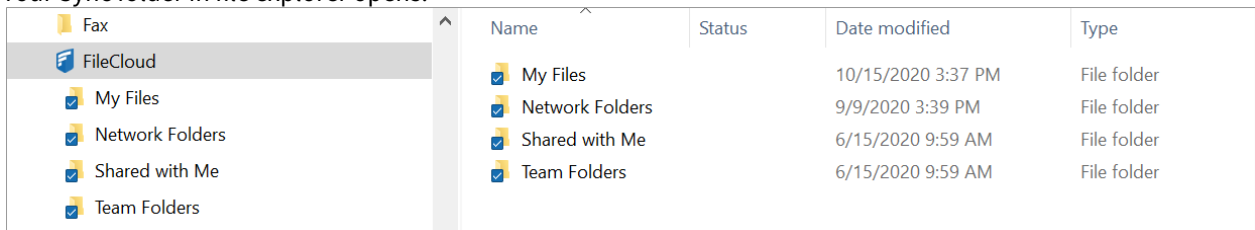
To share files privately in Sync

The procedure for sharing a file privately from the Sync folder in content explorer is nearly identical to the procedure for sharing a file privately from the user portal, Only the first few steps for selecting the file and choosing to share it are different.

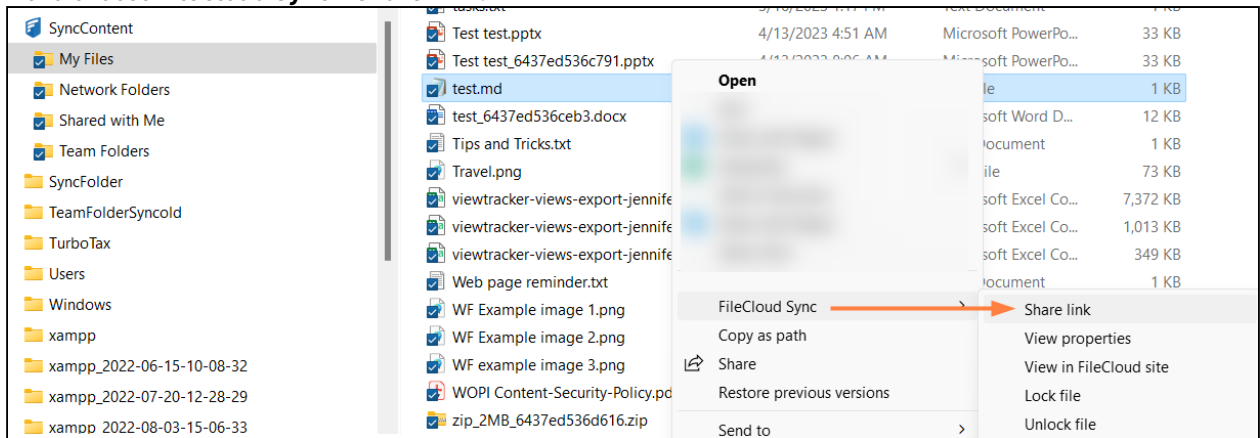
### Initial steps for sharing a file from Sync:

1. In your system tray, right-click on the Sync icon and choose **Open**.
2. At the bottom of the the mini-dashboard, click the folder icon.

Your Sync folder in file explorer opens.



3. Navigate to the file or folder you want to share, then right-click on it and choose **Show More Options**. In the next menu choose **FileCloud Sync > Share Link**.



The **Share link** dialog box opens. By default, the file is shared publicly.

4. To share the file privately, go to [Sharing Files Privately](#) and continue from Step 2.

### Sync: Share options for files

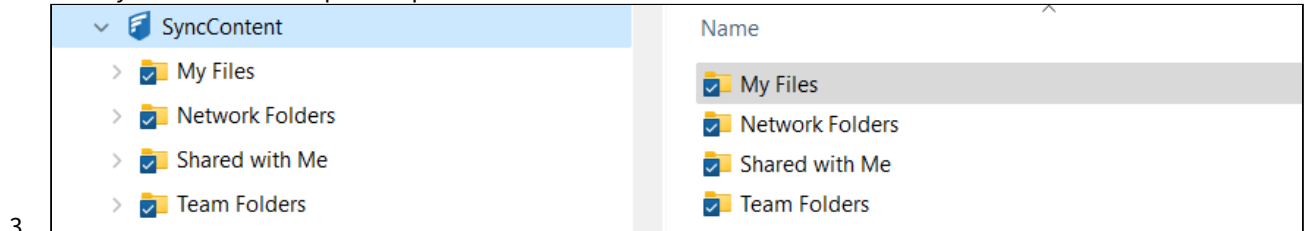
When you initially share a file or when you edit the share, you can add share options.

Note: To configure share options for a file that has already been shared, right-click a file in the Sync folder and choose **Share FileCloud Link**.

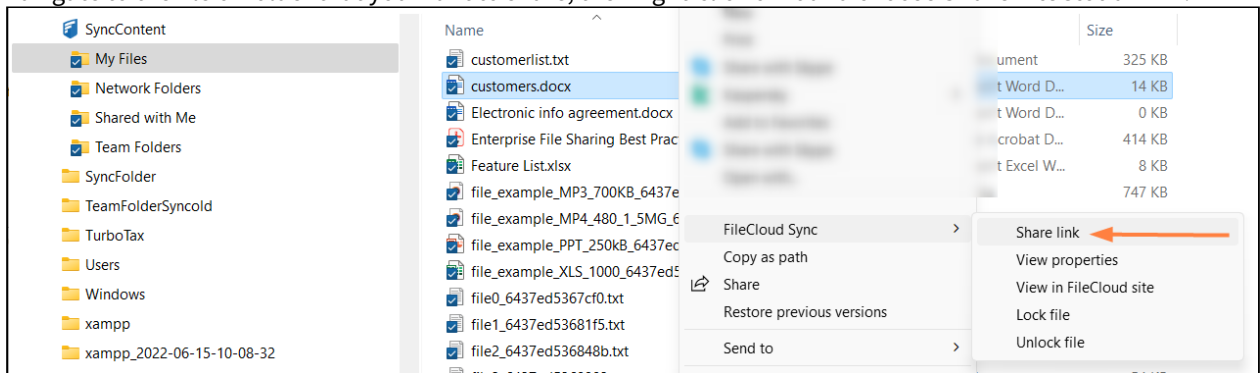
### Perform advanced share actions:

1. In your system tray, right-click on the Sync icon and choose **Open**.
2. At the bottom of the mini-dashboard, click the folder icon.

Your Sync folder in file explorer opens.

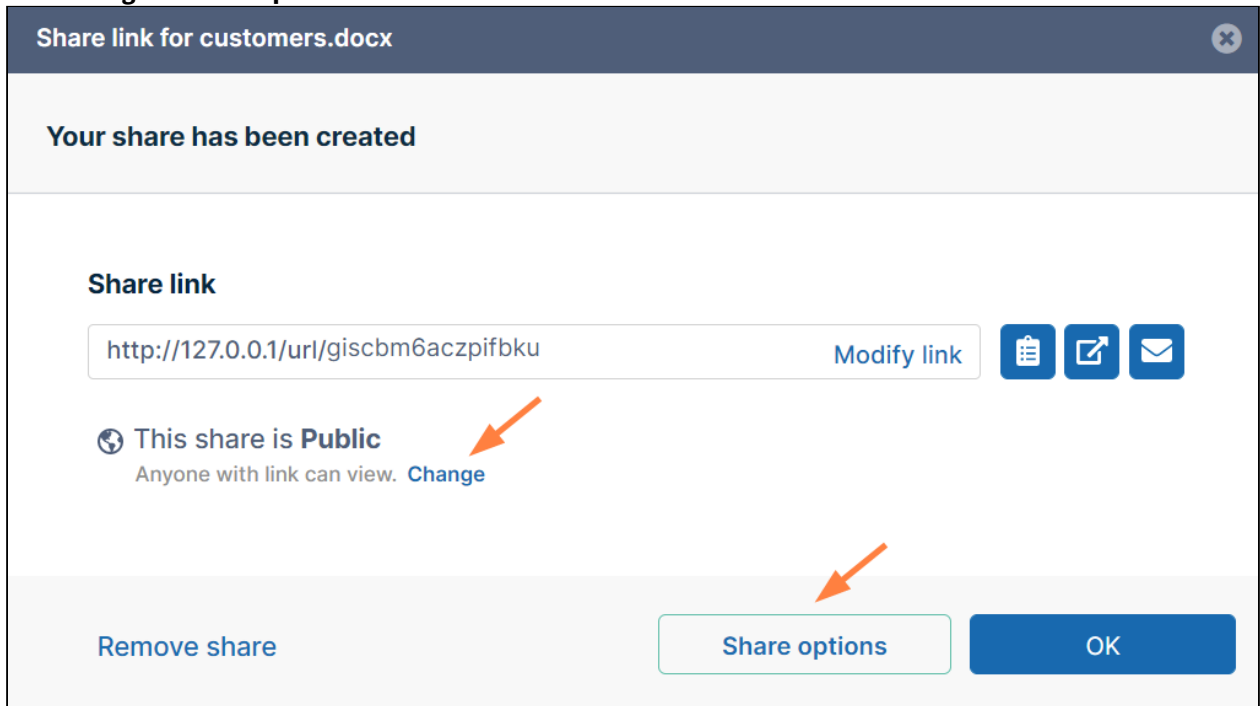


4. Navigate to the file or folder that you want to share, then right-click on it and choose **Share FileCloud Link**.



The Share Link dialog box opens.

5. Click **Change** or **Share options**.



The dialog box expands to show share options.

Share link for customers.docx
✕

**Share link**

http://127.0.0.1/url/giscbm6aczpifbku
Modify link

**Shared file**  
My Files > customers.docx

Share options

Share history

Share name: MeCSoxXBG22QIDad [Change](#)

---

Expires: Never expires

---

Max number of downloads: No Restrictions

---

Send email notifications: Yes

---

Sharing permissions:

- Allow anyone with link
- Allow anyone with link and password
- Allow selected users and/or groups

Remove share

OK

6. Click the icons beside the share link to perform basic actions on it.

**Share link**

http://127.0.0.1/url/giscbm6aczpifbku
Modify link

**Shared file**  
My Files > customers.docx

Copy link

Email link

Open link

- Click **Copy Link** to paste the link into a message or email.
- Click **Open Link** to view the shared file in the FileCloud user portal.
- Click **Email Link** to email the link to one or more users.

7. Change any of the values under **Share Options**, and click **OK**.

Share options

Share history

**Share name:** MeCSoxXBG22QIDad [Change](#)

---

**Expires:** Never expires

---

**Max number of downloads:** No Restrictions

---

**Send email notifications:** Yes

---

**Sharing permissions:**

- Allow anyone with link
- Allow anyone with link and password
- Allow selected users and/or groups

Advanced option	To change
<b>Share Name</b>	Click the link, and enter a new name in <b>Share Name</b> . This is useful if you want to give the share a descriptive or memorable name.
<b>Expires</b>	Click the link, and click <b>Yes</b> , then choose an expiration date in the date picker.
<b>Max number of downloads</b>	Click <b>No Restrictions</b> , and select <b>Restricted to</b> . In <b>Max download allowed</b> , enter the maximum number of downloads. This enables you to prevent excessive distribution of the file.
<b>Send email notifications</b>	<b>Yes</b> , by default. Notifies you when the recipients make changes to the share. Click <b>Yes</b> and select <b>No</b> to stop receiving these notifications.

Advanced option	To change
<b>Password (Public Shares only)</b>	Click the link, and click <b>Yes</b> . You may use the automatically generated password or change it to a more descriptive or memorable one. Check <b>Show Password</b> to check what you've entered.
<b>Sharing permissions</b>	<p>To change from <b>Allow anyone with link</b> (public share) to another option:</p> <ol style="list-style-type: none"> <li>Select one of the other options.           <ul style="list-style-type: none"> <li>If you select <b>Allow anyone with link and password</b>, the share remains public, but users must enter a password to view it. When you choose this option, a password is automatically generated and listed, but you may change it.               <div data-bbox="802 653 1463 829" data-label="Image"> <p>Sharing permissions:</p> <p><input type="radio"/> Allow anyone with link</p> <p><input checked="" type="radio"/> Allow anyone with link and password</p> <p><input type="text" value="z7v5cuvi"/></p> <p><input type="radio"/> Allow selected users and/or groups</p> </div> </li> <li>If you selected <b>Allow selected users and/or groups</b>, the share becomes private and you may add specific users and groups.               <div data-bbox="802 932 1463 1152" data-label="Image"> <p>Sharing permissions:</p> <p><input type="radio"/> Allow anyone with link</p> <p><input type="radio"/> Allow anyone with link and password</p> <p><input checked="" type="radio"/> Allow selected users and/or groups</p> <p>Users (0) Groups (0)</p> <p><a href="#">Invite users</a></p> <p>User View Download Upload Share Sync Delete Manage</p> <p>No entries</p> </div> </li> </ul> </li> </ol> <p>For help inviting users and groups and setting their permissions, see:</p> <ul style="list-style-type: none"> <li><a href="#">Sharing Files Privately</a></li> <li><a href="#">Public Share Options for Files</a></li> <li><a href="#">Private Share Options for Files</a></li> </ul>

## Lock and Unlock Files in Sync

You can set a lock to prevent other users from opening a file.

Locking tells other users that you are actively using that file.

When a file is locked, the following conditions apply:

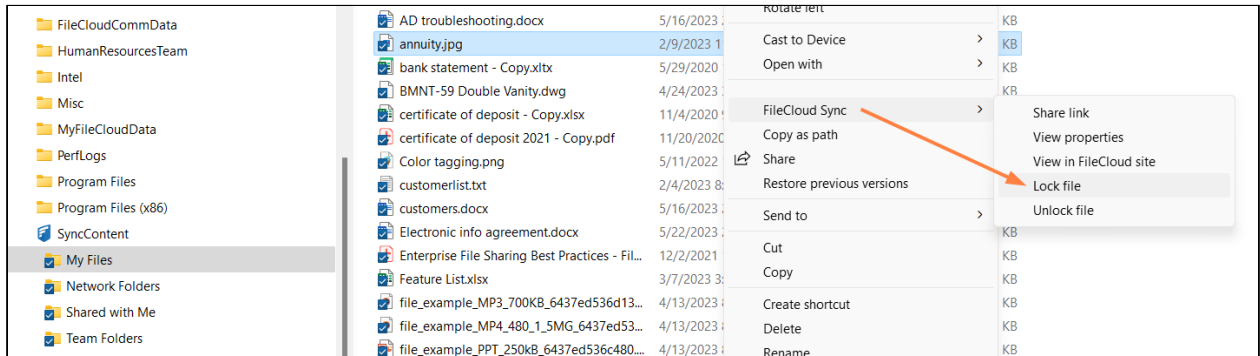
- The owner of the lock has full access to that file and can modify it
- An Admin can always override a lock
- Users can download and view the locked file
- Users cannot modify the locked file

When you lock a file, all of the following clients will be subject to the lock restrictions:

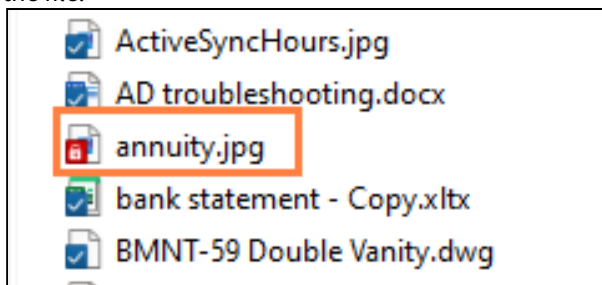
- User Portal accessed from a web browser
- FileCloud Drive
- FileCloud Sync
- Mobile clients
- WebDAV

### To lock a file:

1. In your system tray, right-click the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Open**.  
Your Sync folders open in file explorer.
3. Navigate to the file you want to lock, right-click it, and choose **Show more options**. Then choose **FileCloud Sync > Lock file**.

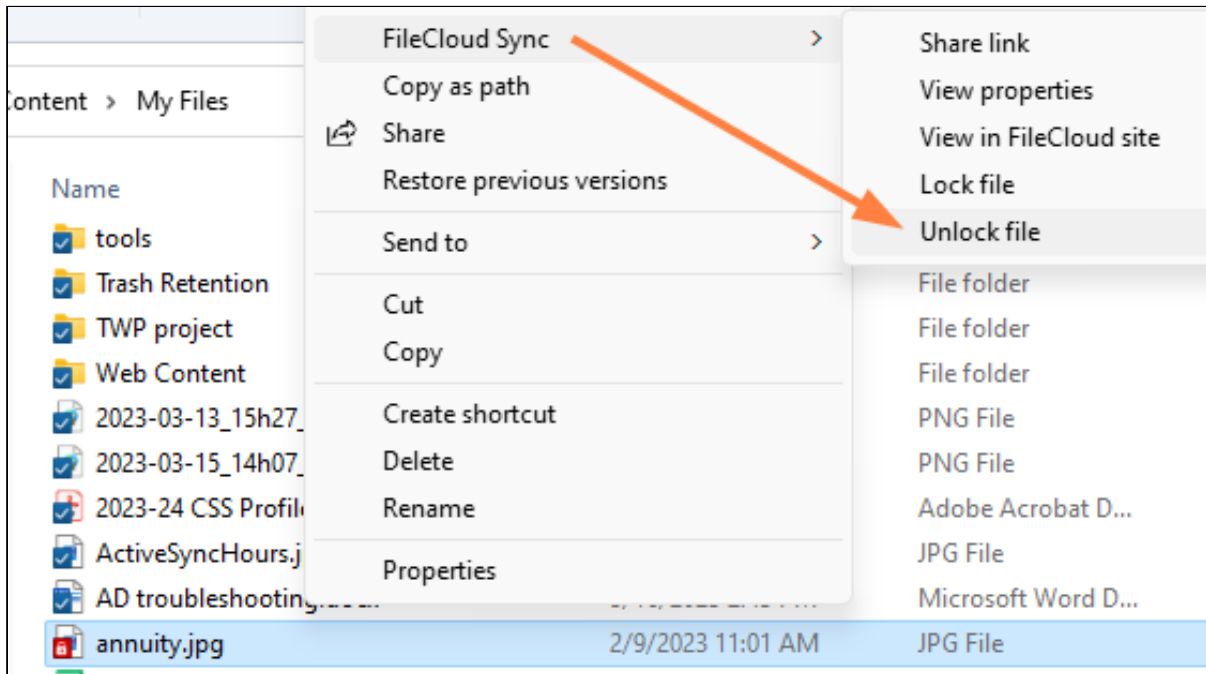


If you have checked **Show Lock Status in Icon Overlay** in [Sync Settings](#), the red lock overlay icon appears on the file.

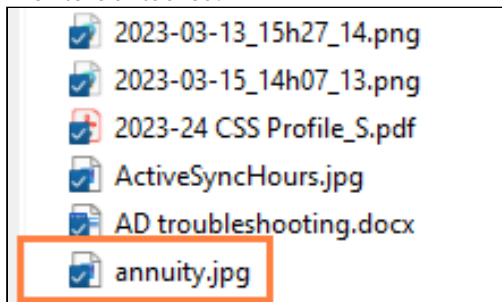


### To unlock a file:

1. Right-click the file you want to unlock, and choose **Show more options**. Then choose select **Unlock FileCloud File**.



The file is unlocked:



## Lock and Unlock Folders in Sync

You can set a lock to prevent other users from opening a folder.

Locking tells other users that you are actively using that folder.

When a folder is locked, the following conditions apply:

- The owner of the lock has full access to that folder and can modify it
- An Admin can always override a lock
- Users can download and view the locked folder
- Users cannot modify the locked folder

When you lock a folder, all of the following clients will be subject to the lock restrictions:

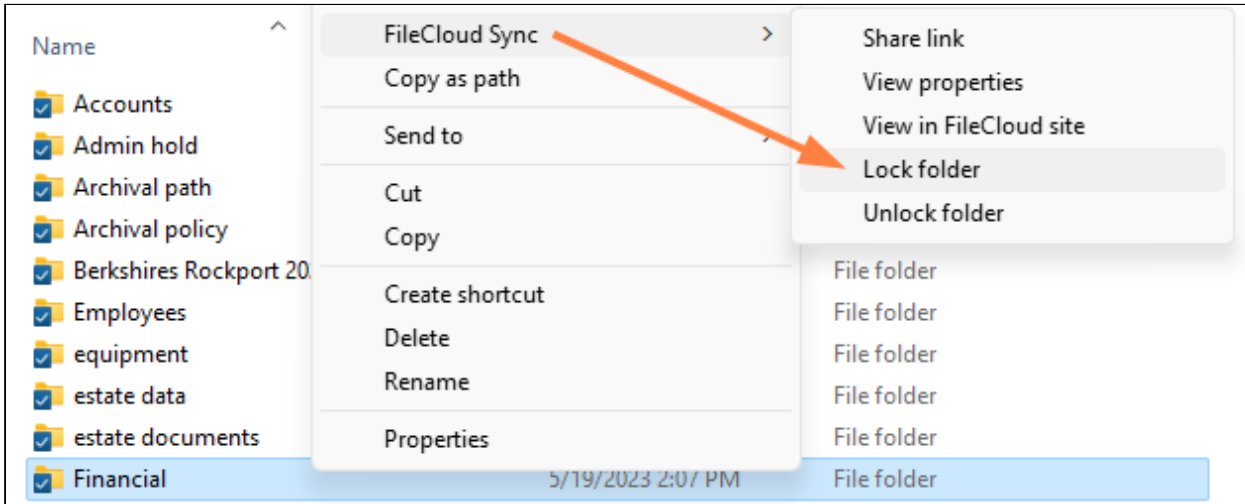
- User Portal accessed from a web browser
- FileCloud Drive
- FileCloud Sync
- Mobile clients



- WebDAV

### To lock a folder:

1. In your system tray, right-click the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Open**.  
Your Sync folders in file explorer open.
3. Right-click the folder you want to lock, and choose **Show more options**. Then choose **FileCloud Sync > Lock folder**.

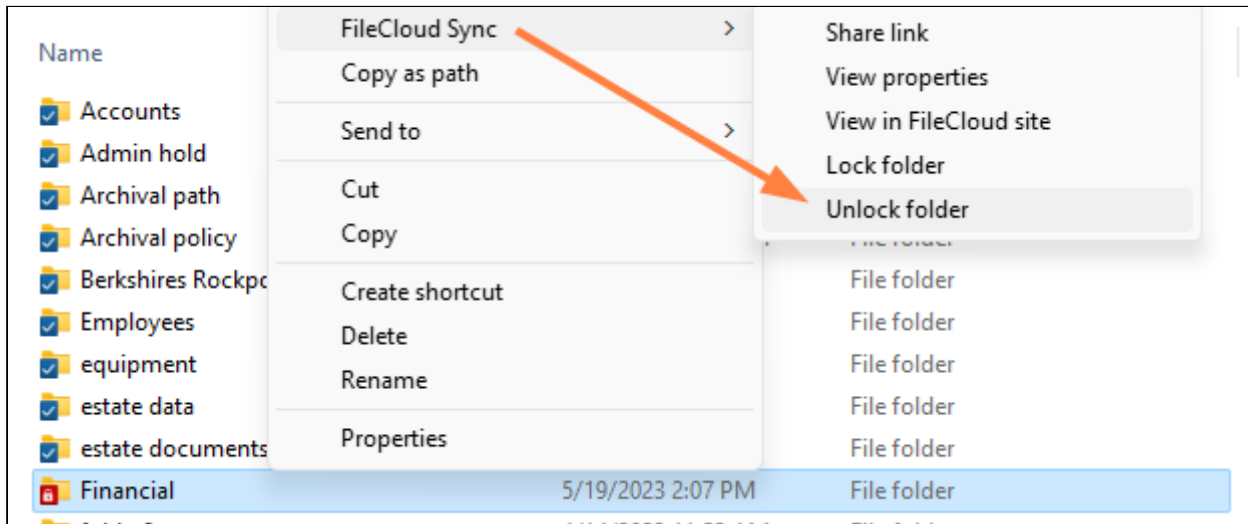


If you have checked **Show Lock Status in Icon Overlay** in [Sync Settings](#), the red overlay icon appears on the folder.



### To unlock a folder:

1. Right-click the folder you want to unlock, and choose **Show more options**. Then choose **FileCloud Sync > Unlock folder**.



The folder is unlocked:

Employees	4/11/2023
equipment	4/11/2023
estate data	4/11/2023
estate documents	5/11/2023
Financial	5/19/2023
folder0	4/14/2023
folder1	4/14/2023

## Create a Direct FileCloud Link in Sync

You can use this option to create a link to a share that can be accessed by users who are already part of the share.

The Direct Link option works only with items in the following folders:

- Shared with me
- Team Folders

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

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.

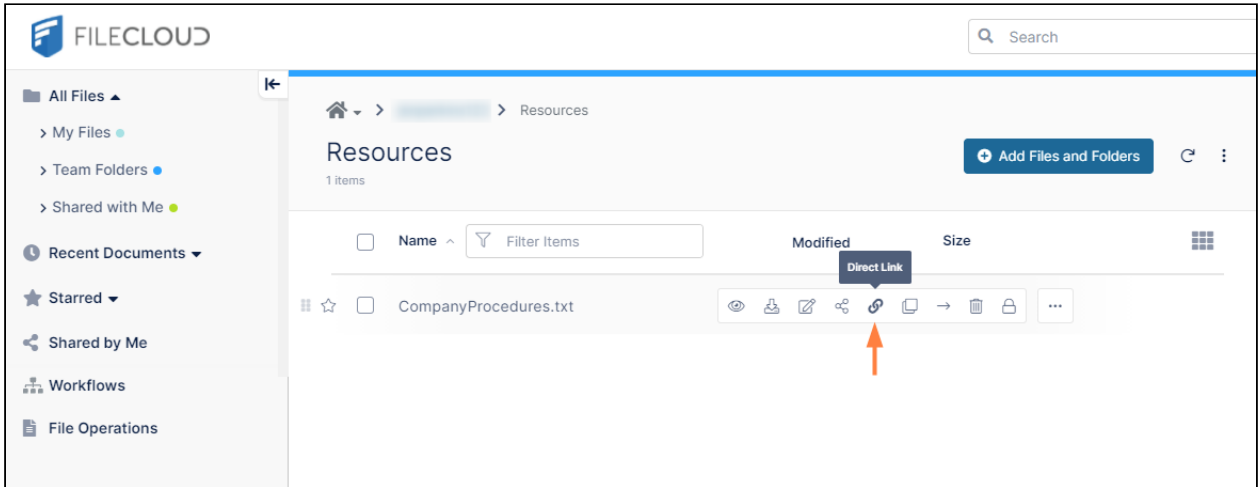
When users click the link, they are prompted to log in and then taken directly to the selected folder or file.

**Limitation**

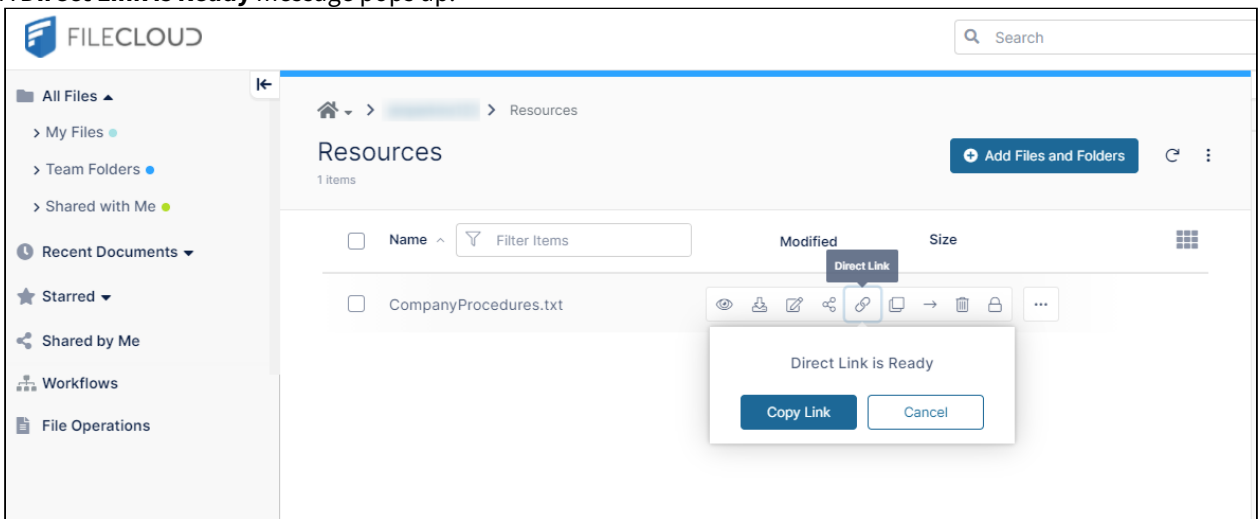
For Team Folders, direct links to files in sub-folders that are created by users who have access to the parent folder and sub-folder will not work for users who only have access to the sub-folder, because the links will include the parent folder path, which does not exist in the file structure of those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

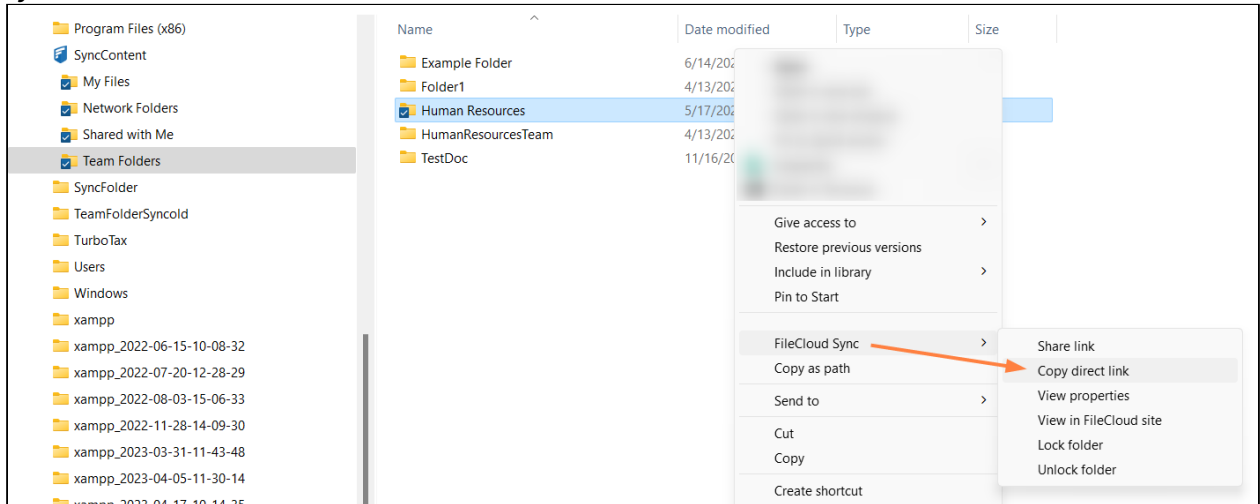


3. Click **Copy Link**.
4. Paste the link into an email or a file, and send it to users.

**To create a direct link:**

1. In your system tray, right-click the Sync icon and choose **Open**.

2. In the mini-dashboard, click **Open**.  
Your file explorer opens and displays the Sync folders.
3. Open **Team Folders** or **Shared with Me**.
4. Navigate to the item, then right-click it and choose **Show More Options**. In the next menu choose **FileCloud Sync > Create Direct FileCloud Link**.



The direct link is created and copied to the clipboard. You can now paste it into an email or a file.

## Performing file explorer actions on Sync files

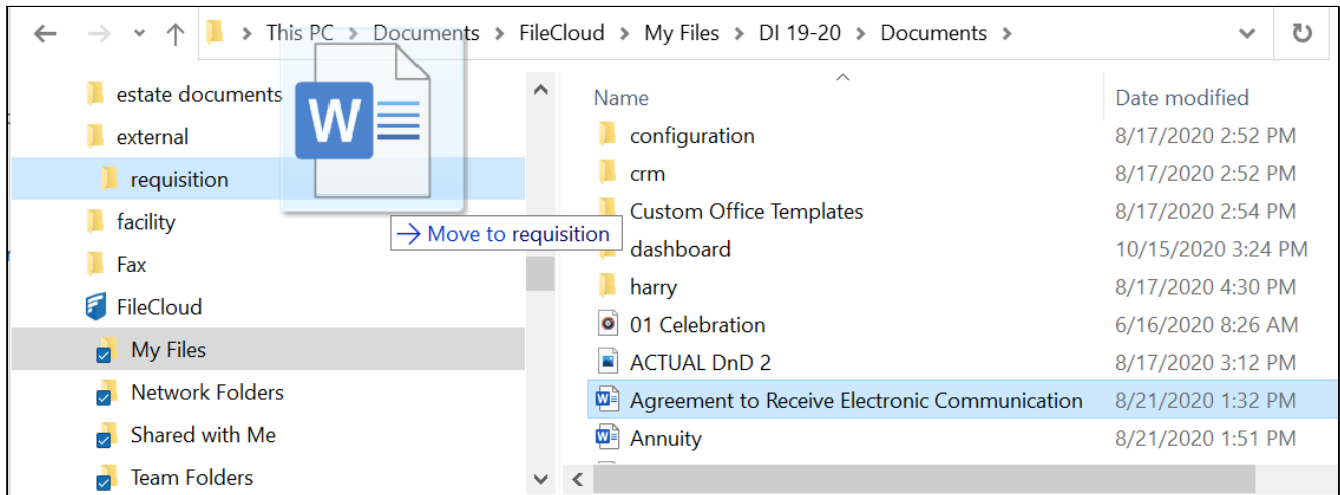
You can perform most file explorer actions on Sync files and folders. Follow the same procedures you use to perform these actions on other files and folders in file explorer, and they are synced to the FileCloud server. They include:

- Creating a new folder in your Sync folders.  
Sync records this as an upload when it syncs with the FileCloud server.
- Deleting a Sync file or folder.  
Sync records this a deletion when it syncs with the FileCloud server.
- Editing a Sync file or folder.  
Sync records this as an upload when it syncs with the FileCloud server.
- Moving a Sync file or folder within Sync folders.  
Sync records this as a deletion and an upload when it syncs with the FileCloud server.
- Renaming a Sync file or folder.  
Sync records this as a deletion and an upload when it syncs with the FileCloud server.

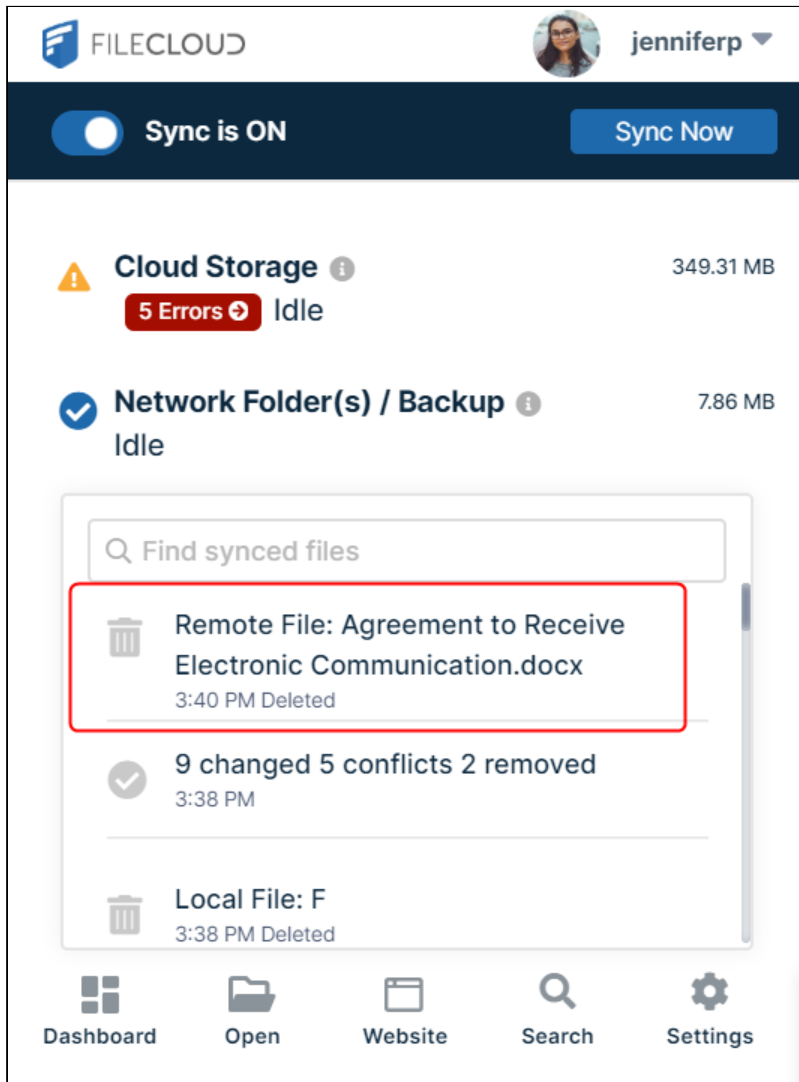
## Delete Files and Folders in Sync

When you are in your Sync folders in your file explorer, you can delete a file or folder from FileCloud by moving it from a Sync folder to a folder outside of your Sync folders. When the action is synced to FileCloud, it is recorded as a deletion.

In the example below, the file **Agreement to Receive Electronic Communication** is moved from a sub-folder in the Sync **My Files** folder to the external folder **Requisition**.



When syncing occurs, the **Agreement to Receive Electronic Communication** file is logged as a deletion:

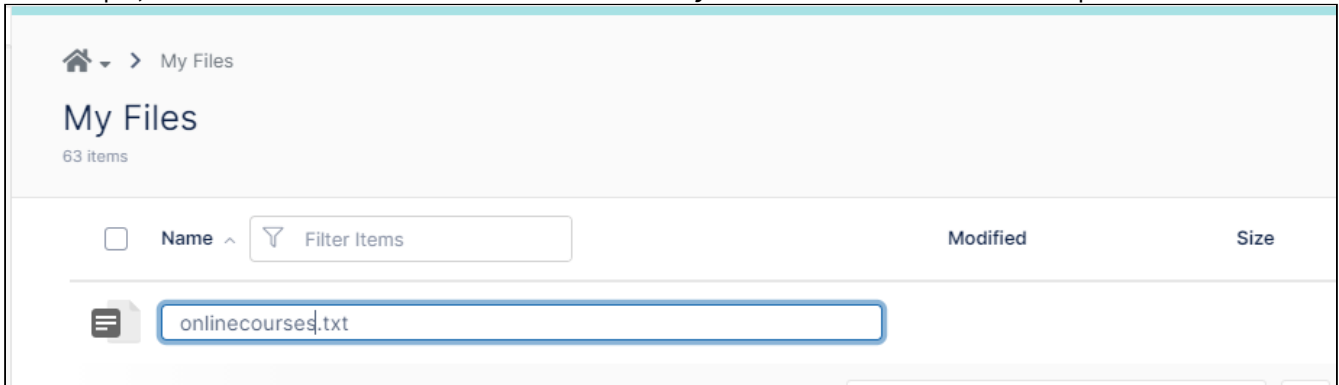


You can also delete the file through the normal process of right-clicking on the file or folder within the Sync folders and choosing **Delete**.

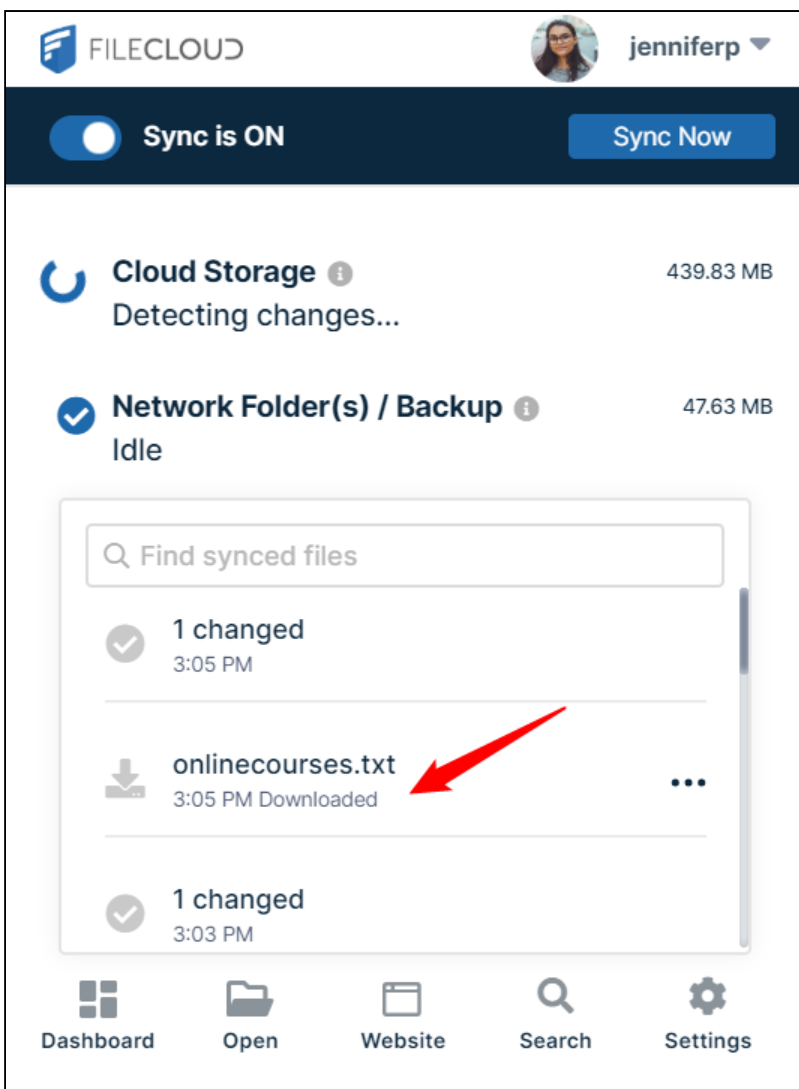
## Download a File in Sync

If you create a new file or folder in FileCloud, when Sync runs and the file is added to the local Sync folder, it is recorded as a download action in Sync.

For example, the file **onlinecourses.txt** is created in a user's **My Files** folder in the FileCloud user portal.



Sync records the action as a download because it downloads the new file to the local Sync My Files folder.

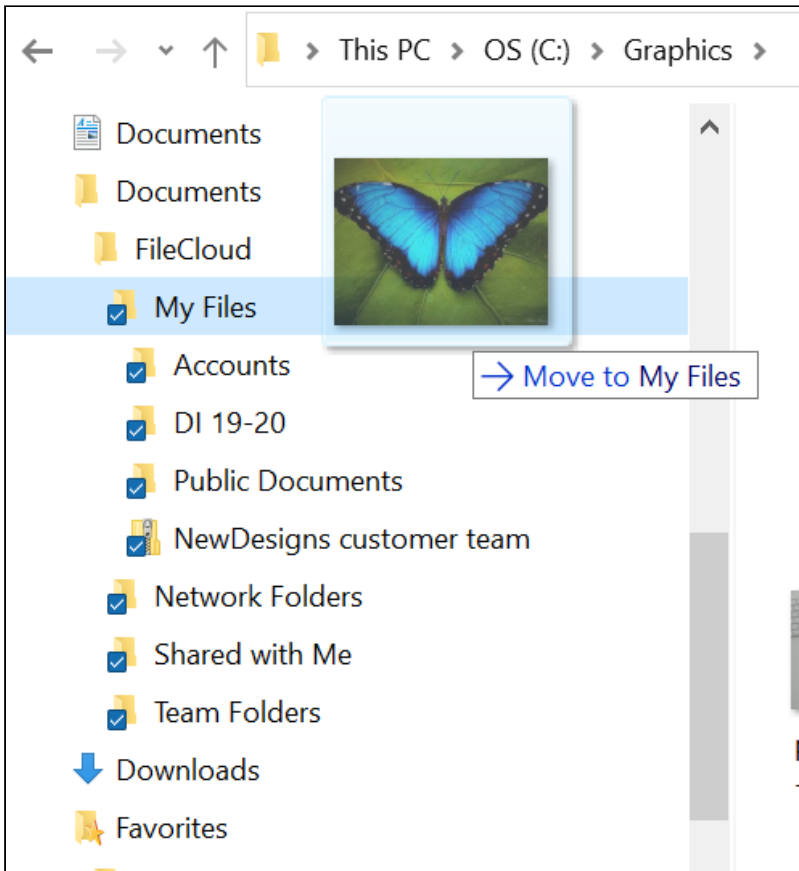


## Upload a File in Sync

### How to upload files in Sync

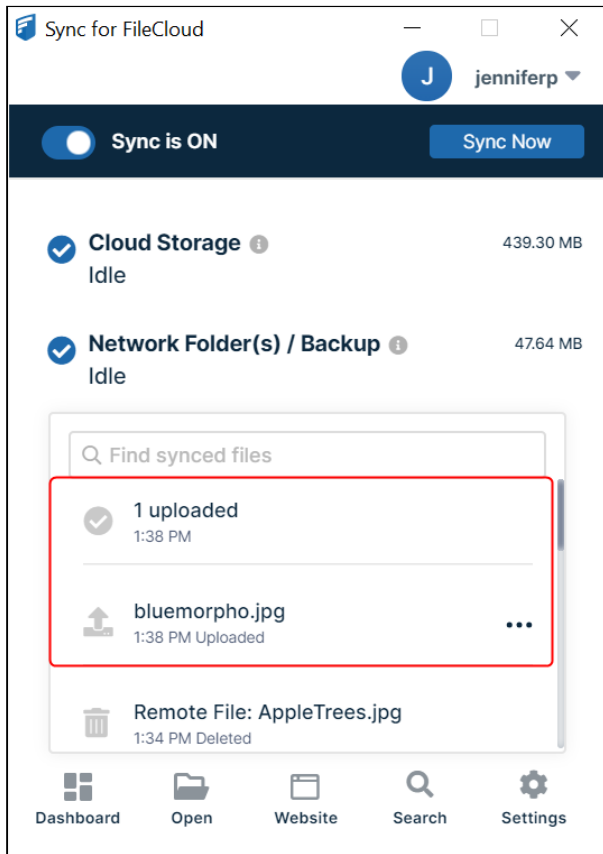
Drag and drop files or folders into the Sync folders to upload them to FileCloud.

Here, a user drags a file from an external folder and drops it into **My Files**:





When FileCloud syncs, the action appears as an upload:



## 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.

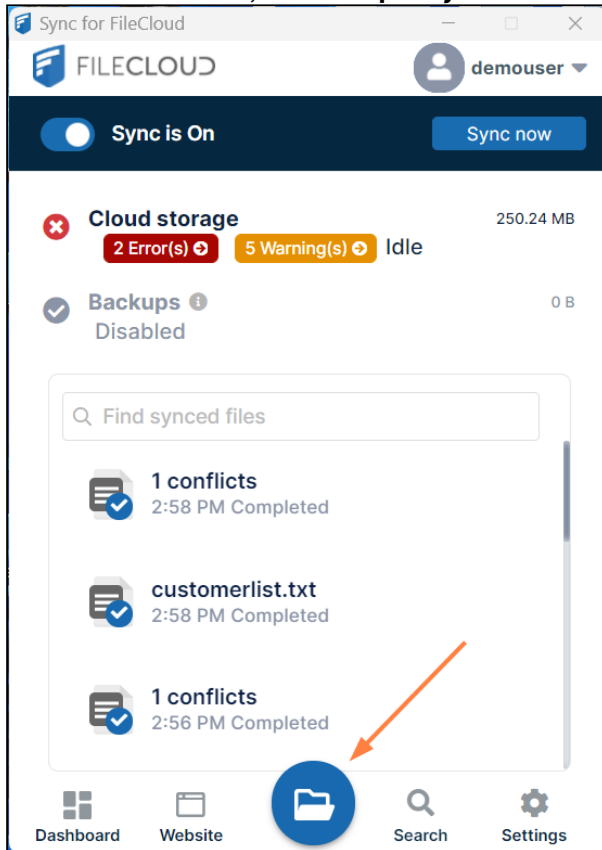
### **i** For Admins

- 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](#).

## Resolve conflicts in Sync

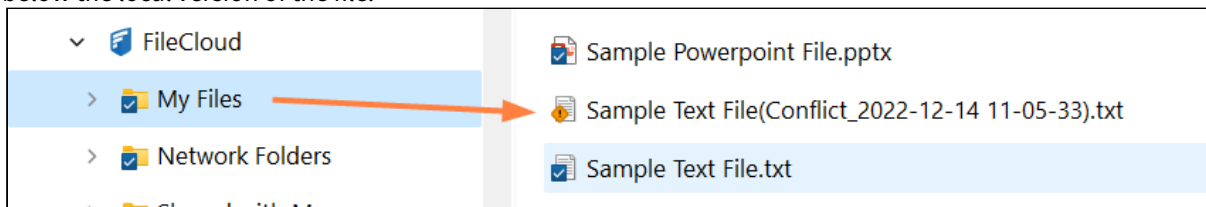
### Resolve a conflict from the Sync directory in file explorer:

1. In your system tray, right-click on the Sync icon and choose **Open**.
2. In the mini-dashboard, click the **Open Sync Folder** icon.

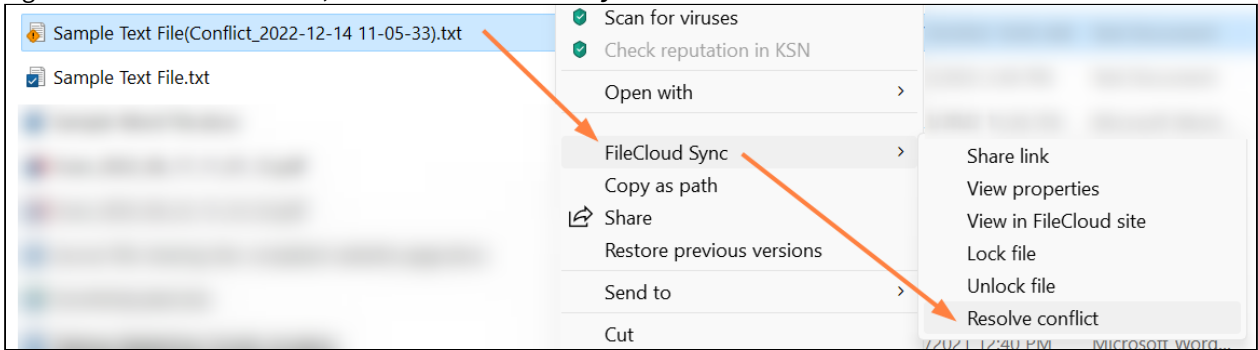


File explorer opens and displays your Sync directory.

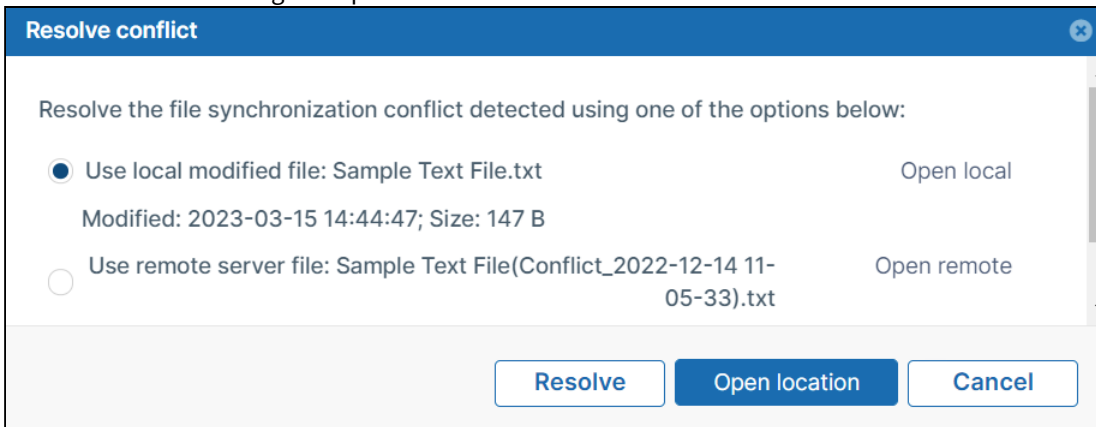
3. Open the folder in your Sync directory that contains the conflict file or folder.  
A conflict file has a yellow warning icon over it and a name in conflict format in parentheses. It appears above or below the local version of the file.



4. Right-click on the conflict file, and choose **FileCloud Sync > Resolve conflict**.



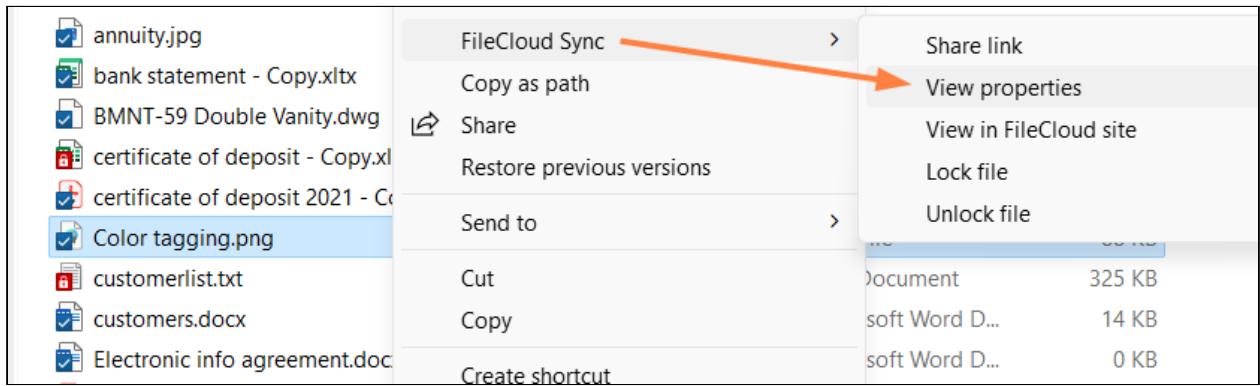
A **Resolve Conflict** dialog box opens.



5. If you want to check the content of either file before choosing which copy to save, click **Open local** or **Open remote**.
6. Select **Use local modified file: (filename)** to discard the server file and keep your modified local file.  
or  
select **Use remote server file: (filename)** to discard your modified local file and save the server file.
7. Click **Resolve**, and confirm your change.  
The conflict file no longer appears.

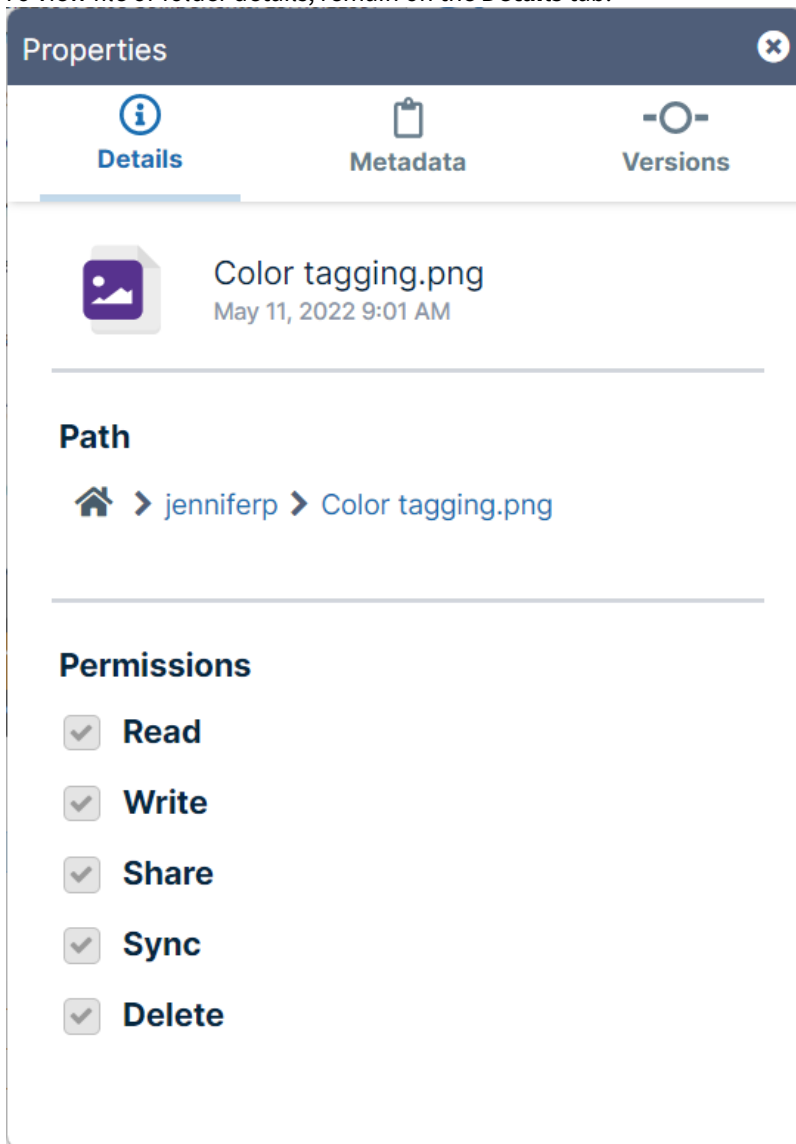
## View a file or folder's details in Sync

1. In your system tray, right-click on the Sync icon and choose **Open**.
2. At the bottom of the the mini-dashboard, click the folder icon.  
Your Sync folder in file explorer opens.
3. In your Sync folders, navigate to the file or folder.
4. Right-click the file or folder and choose **Show More Options**. In the next menu choose **FileCloud Sync > View properties**.

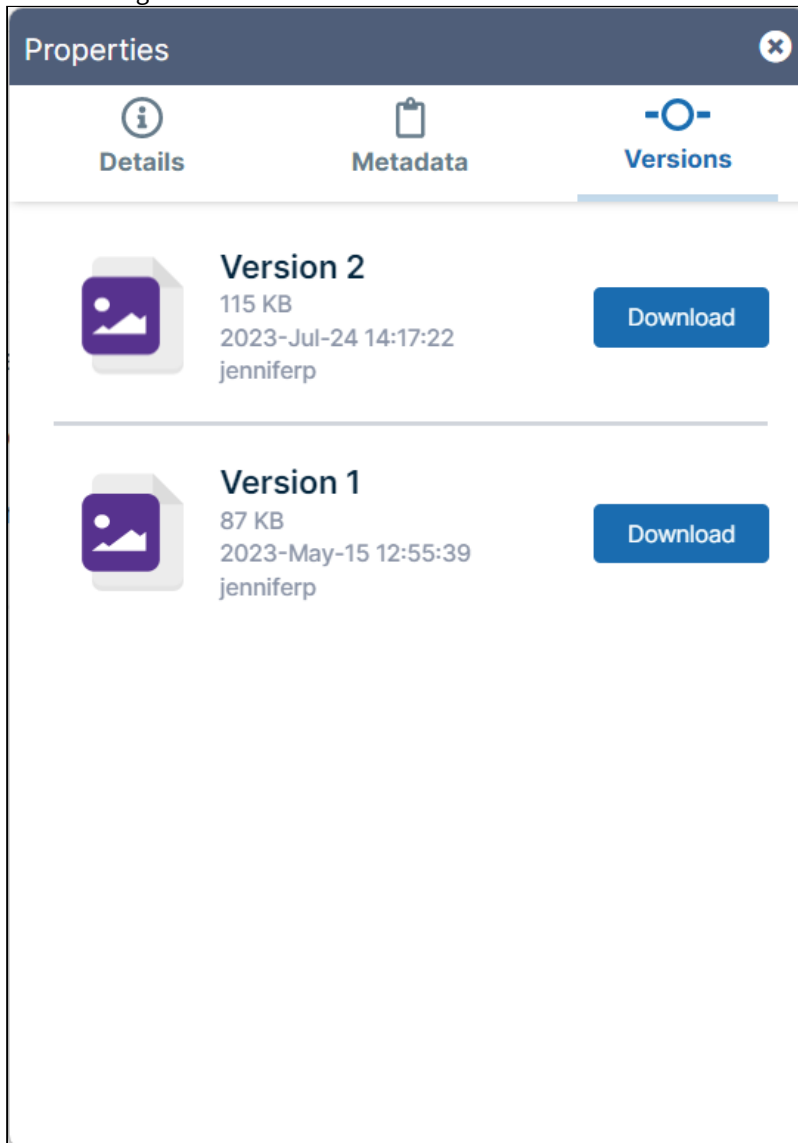


A **Properties** dialog box opens to the **Details**, **Metadata**, and **Versions** tabs.

- To view file or folder details, remain on the **Details** tab.



- If you are viewing details of a file, as in the image above, the filename and last modified date are shown at the top of the **Details** tab.
  - Under **Path** the path of the file or folder is listed.
  - Under Permissions, your permissions for the file or folder are listed.
6. To see information about a file's versions, click the **Versions** tab. The tab lists details of each version of the file and includes a download arrow beside each version for downloading it.



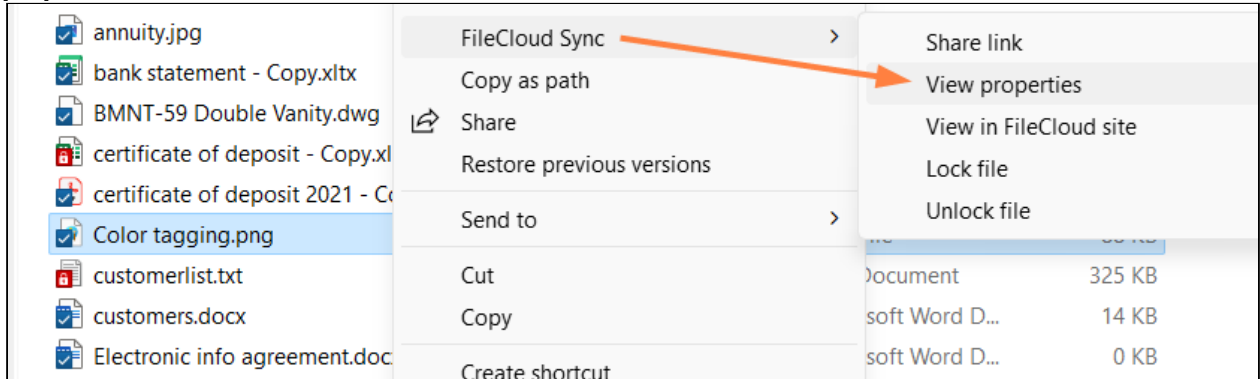
7. To see information about the files metadata, click the **Metadata** tab. For information about working in the **Metadata** tab, see [Work with Metadata in Sync](#).

## Work with Metadata in Sync

You can view the metadata attributes for a file, or add an attribute if your administrator allows it.

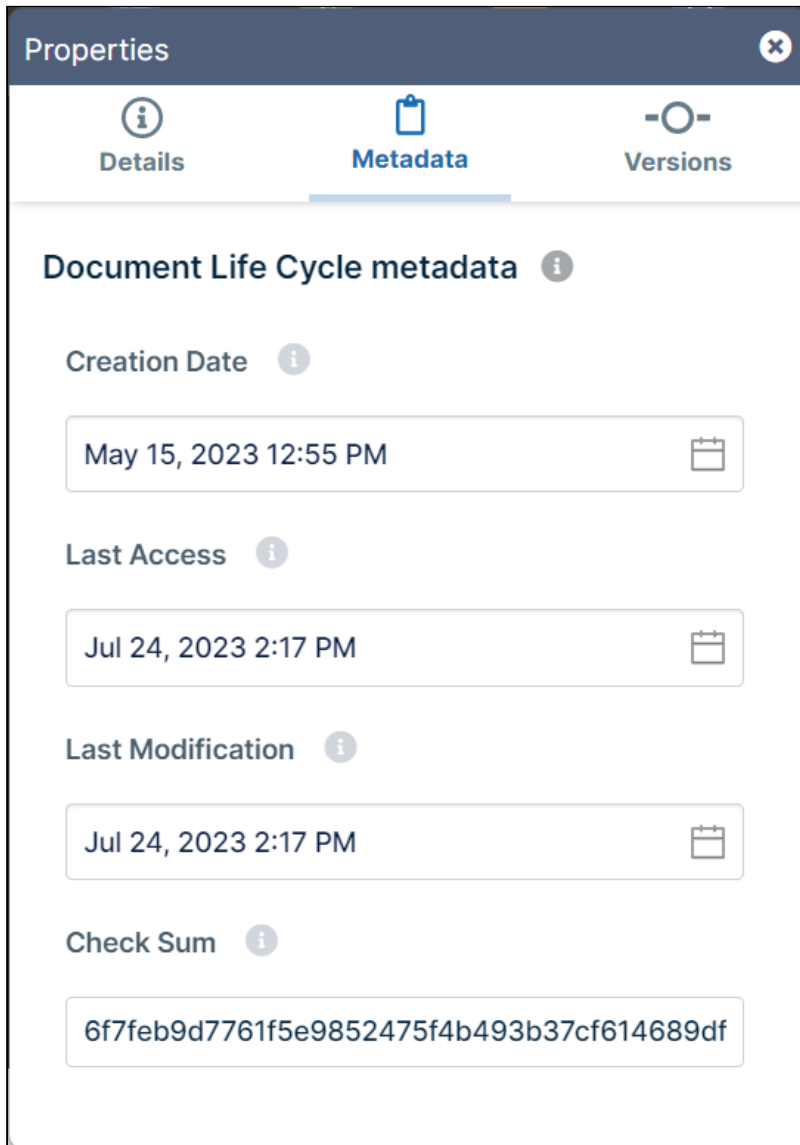
### To view or add metadata:

1. In your system tray, right-click the Sync icon and choose **Open**.
2. At the bottom of the the mini-dashboard, click the folder icon. In your Sync folders, navigate to the file or folder.
3. Right-click the file or folder and choose **Show More Options**. In the next menu choose **FileCloud Sync > View properties**.



A **Properties** dialog box opens to the **Details, Metadata, and Versions** tabs.

- Click the **Metadata** tab.  
The metadata sets available for the file or folder are listed.

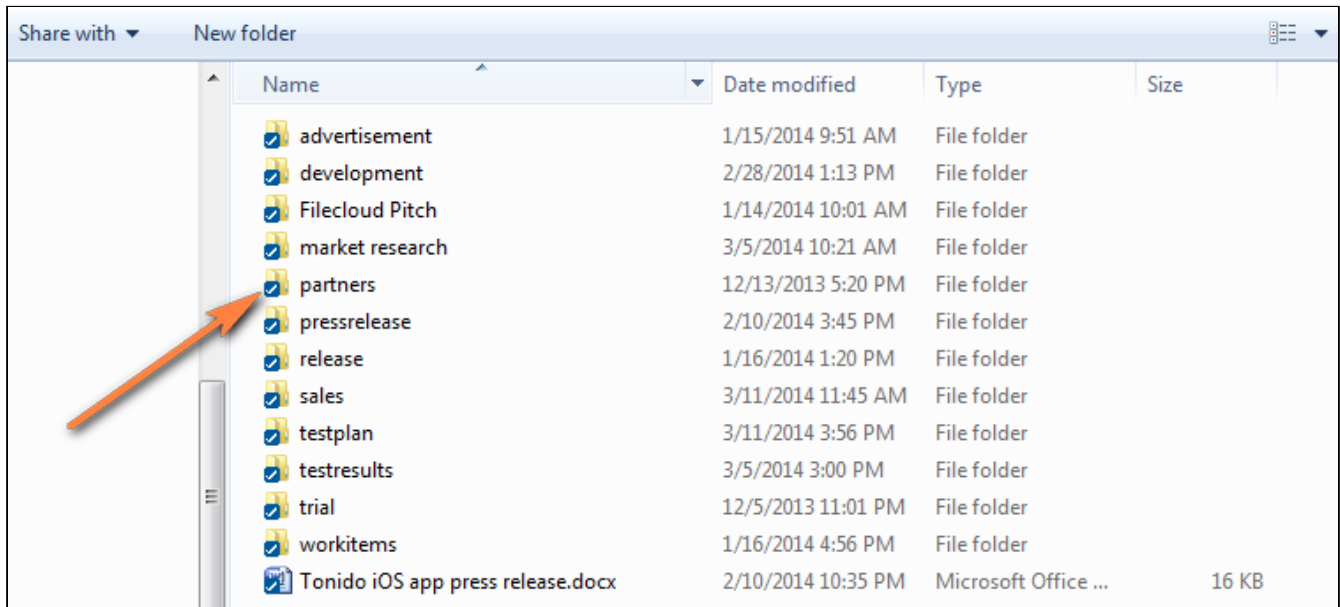


- View and if you have permission, add or modify metadata values.  
For more information about metadata in FileCloud, see [Managing Metadata](#).

## Sync Icon Overlays

The FileCloud Sync app on Windows shows overlay icons on files and folders to indicate their sync status.

The overlay icons appear on all files and folders inside MyFiles, Network Shares, Team Folders, and Shared with Me.



The following icon overlays are currently supported.

Icon	Status
No Icon	File or Folder is new and has not been synced to the sync server.
	File or Folder has been synced to server and is up to date.
	File has been modified and has not yet been synced to the server.
	File is in conflict because changes have been made both in the server and locally. It needs to be resolved by the user.
	File is in a lock state and the owner must release the lock for other users to update it. The lock only appears if you have checked <b>Show Lock Status in Icon Overlay</b> in <a href="#">Sync Settings</a> .

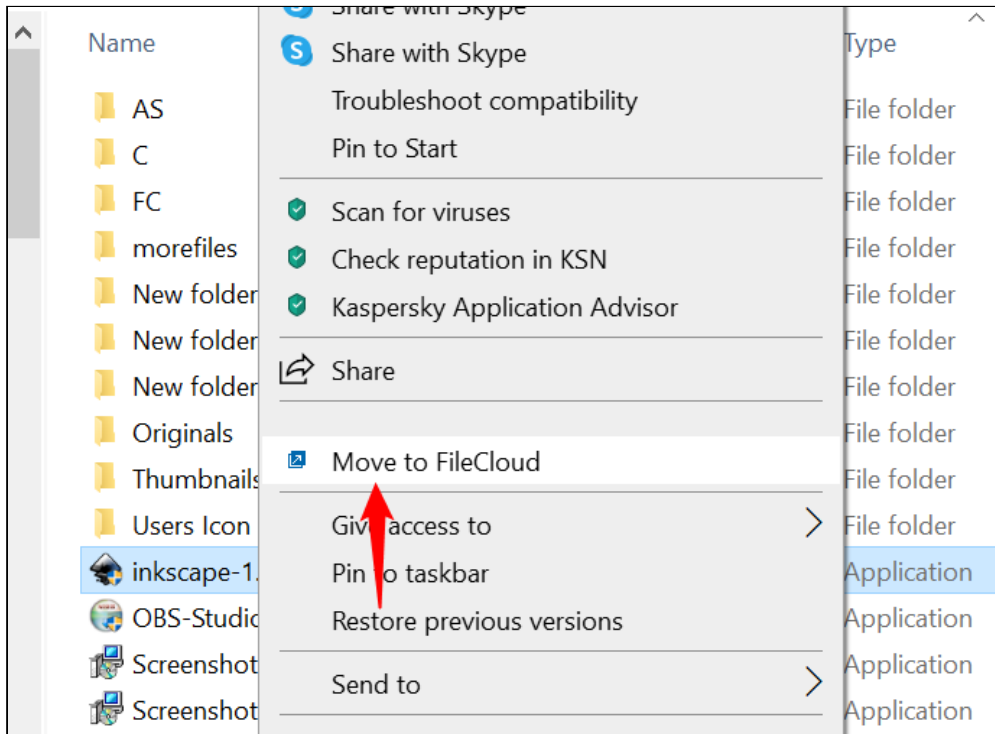
## Move a File Outside Sync into FileCloud

When Sync is running, if you right-click on a file or folder outside of the Sync folders the menu displays a **Move to FileCloud** action.



To move a file or folder outside the FileCloud Sync folder to **My Files**, right-click the file or folder and choose **Move To FileCloud**.

The file or folder is moved into the **My Files** Sync folder and automatically synced to the remote FileCloud server.



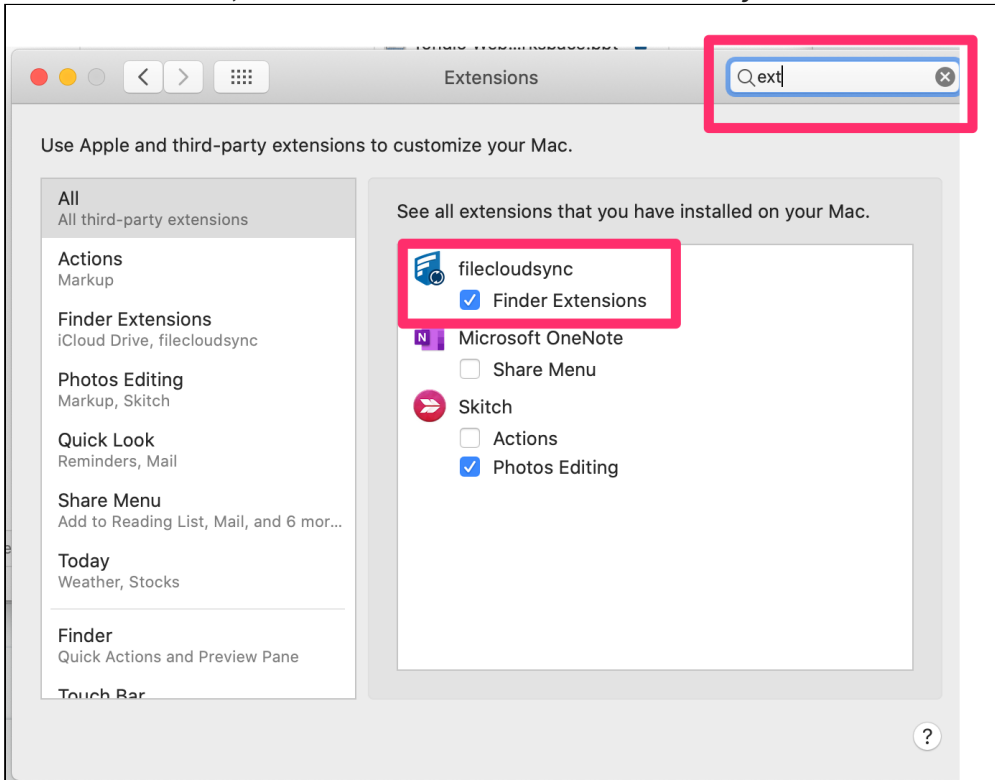
## Mac OSX Finder Right-Click Extension

### Mac OSX Finder Right-Click Extension

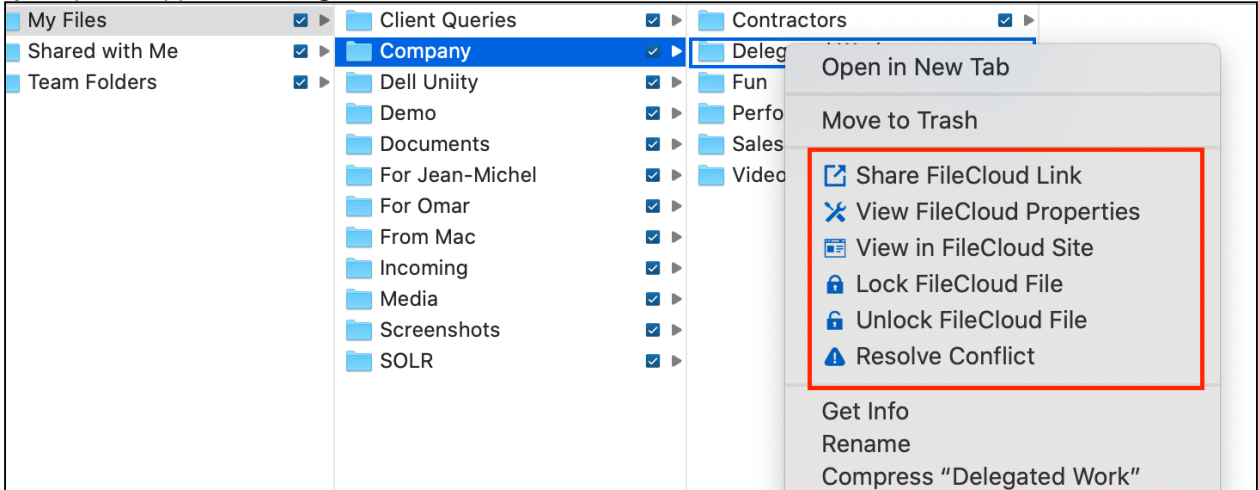
To include right-click sharing options with FileCloud Sync on Mac OSX, you must enable FileCloud Sync extensions.

1. Open your MacOS settings, and go to **System Preferences > Extensions**.

2. Search on *extensions*, and enable **Finder Extensions** for **filecloudsync**.



Now when you go to the Sync folder in the Finder, icons appear to the right of files and folders, and FileCloud Sync options appear in the right-click menu.



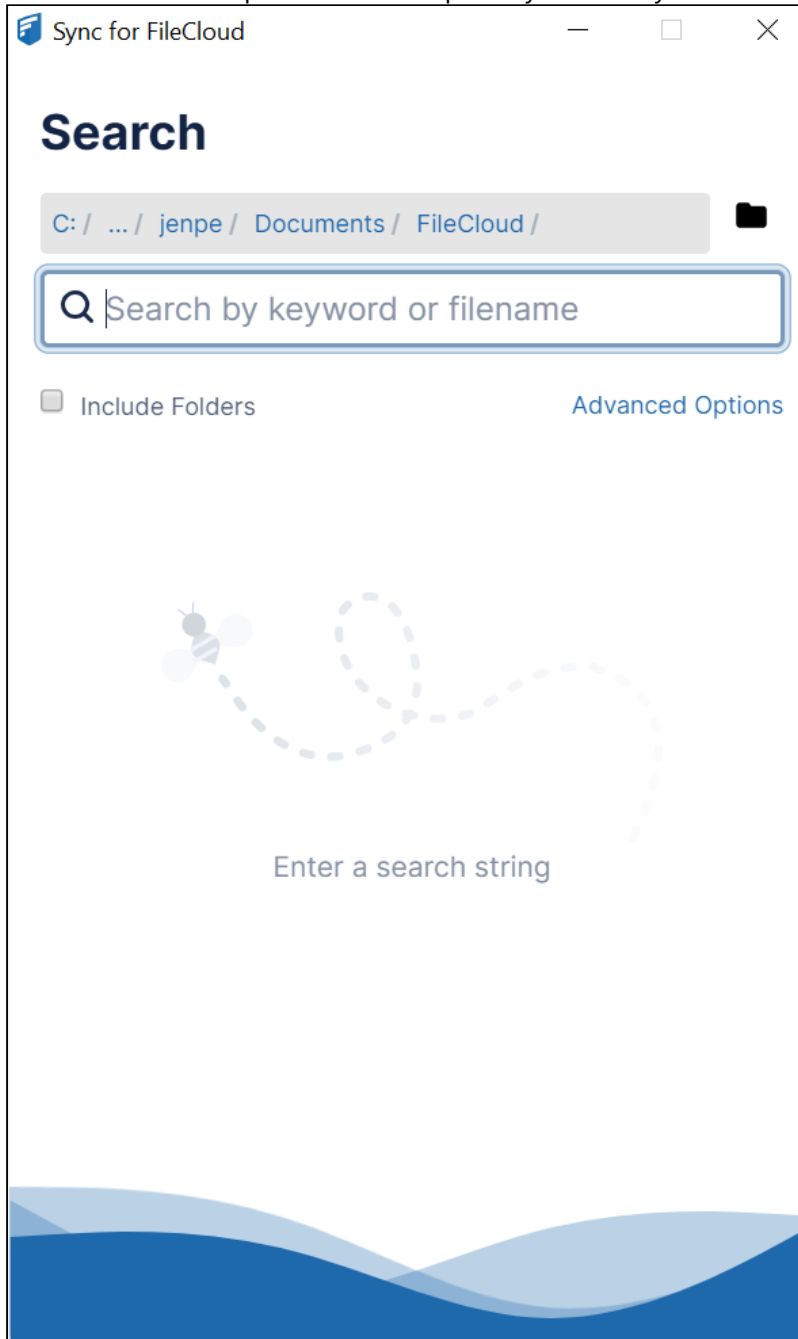
## Searching in Sync

Beginning with FileCloud Version 20.2, users are able to search for files in Sync using the desktop client.

## How do I access the search window?

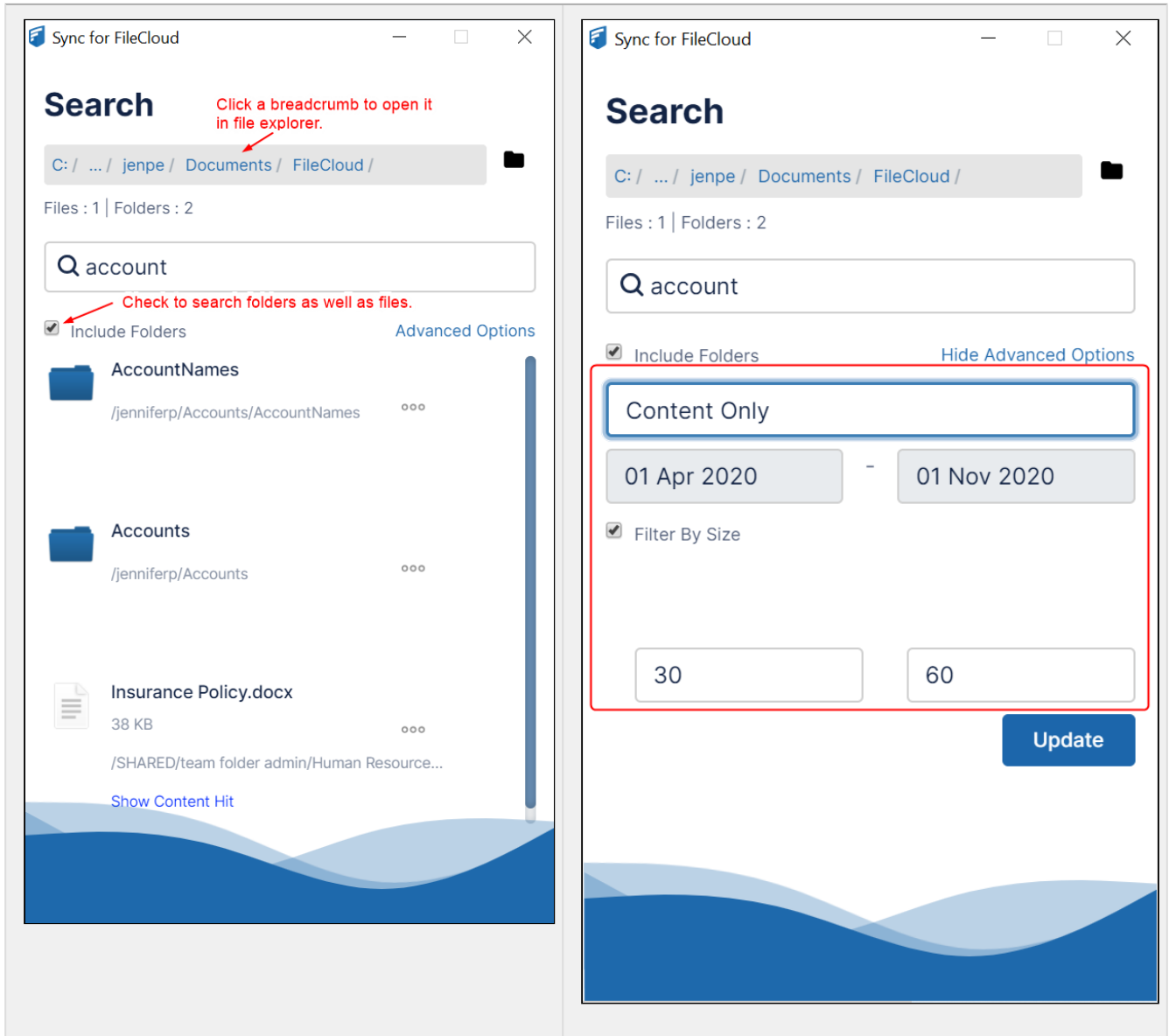
1. In your system tray, right-click on the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Search**.

The **Search** window opens. The current path is your local Sync folder.



## Basic and Advanced Search

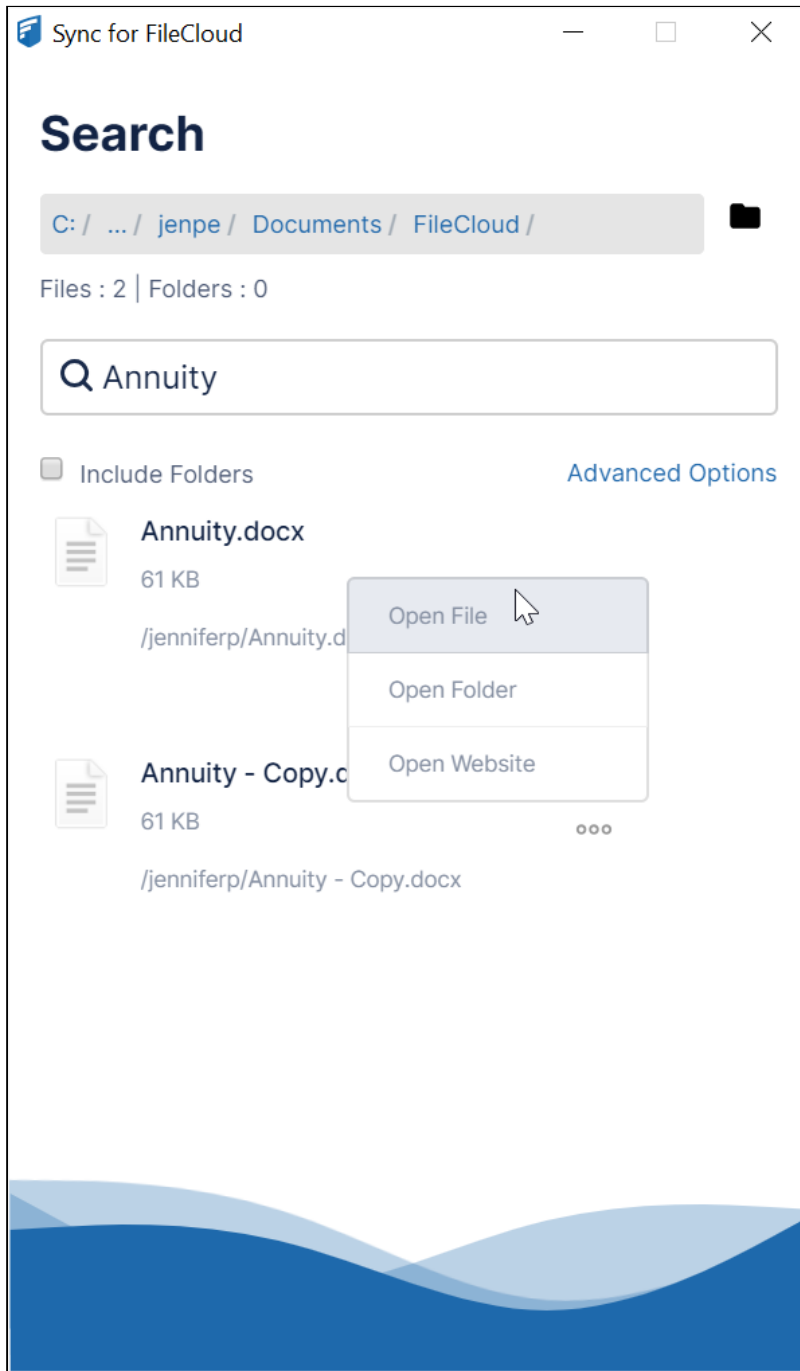
<b>Basic search view</b>	<b>Advanced search view</b>
<p>Enter a search term. Searching begins automatically. The files and folders returned are listed in the lower portion of the Search window.</p> <p>Check <b>Include Folders</b> to search folder names as well as file names.</p>	<p>Click <b>Advanced Options</b> in the Basic search to view the Advanced Options fields. Choose any of the advanced options:</p> <ul style="list-style-type: none"> <li>• <b>All, Name Only, Content Only, or Metadata</b></li> <li>• Date range</li> <li>• <b>Filter by size</b> (check the box, then enter a size range)</li> </ul> <p>Click <b>Update</b> to begin the search. The results appear in Basic search view.</p>



## Accessing items after searching

**Access a file after searching:**

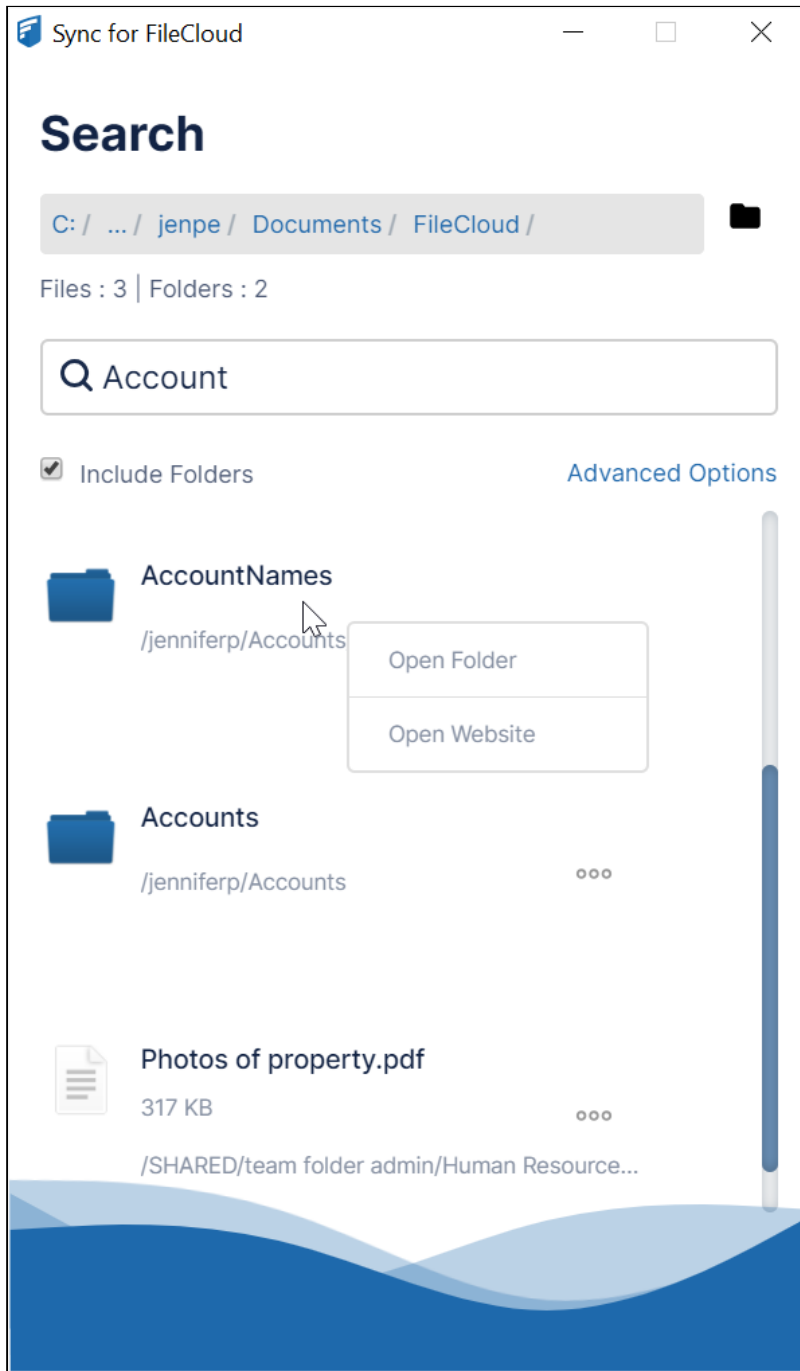
1. In the Search window, right-click the file.



2. To open the file in an application, click **Open File**.
3. To view the file listing in the Sync folder, click **Open Folder**.
4. To view the file listing in FileCloud, click **Open Website**.

**Access a folder after searching:**

1. In the Search window, right-click the folder.



2. To view the folder in the Sync folder, click **Open Folder**.
3. To view the folder in FileCloud, click **Open Website**.

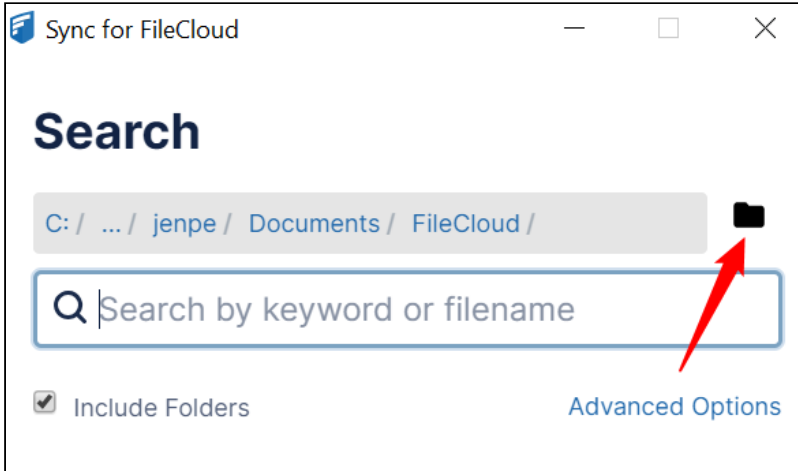
Also see:

## Changing the Sync search path

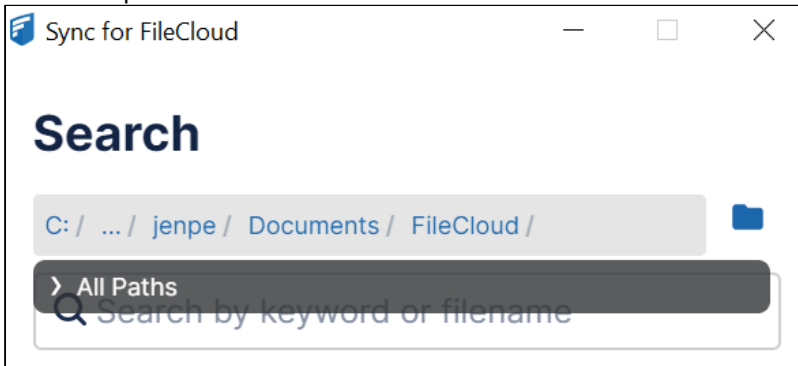
You can change the search path without leaving the Search window.

### To change the search path from the Search window:

1. Click the folder icon next to the search box.

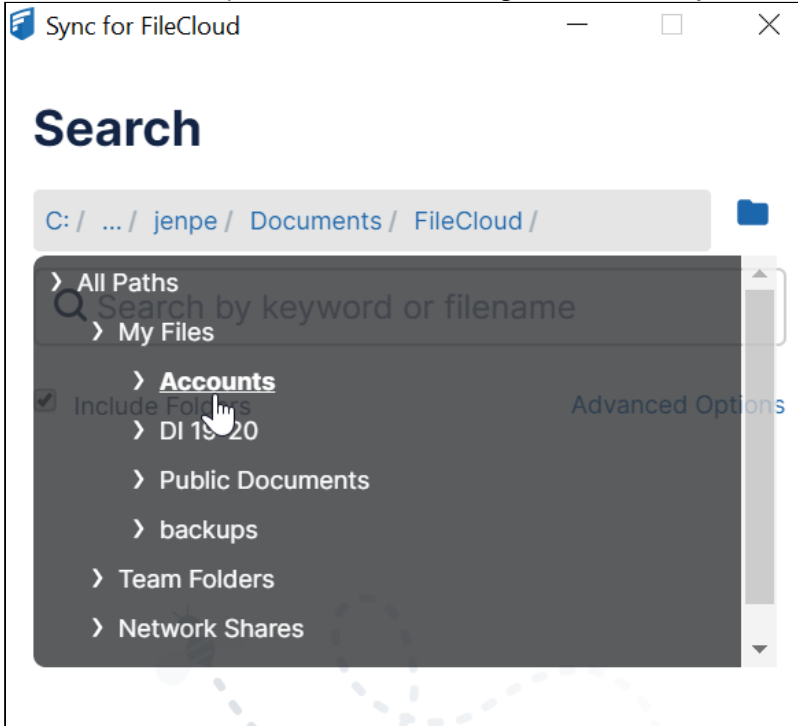


### All Paths opens:

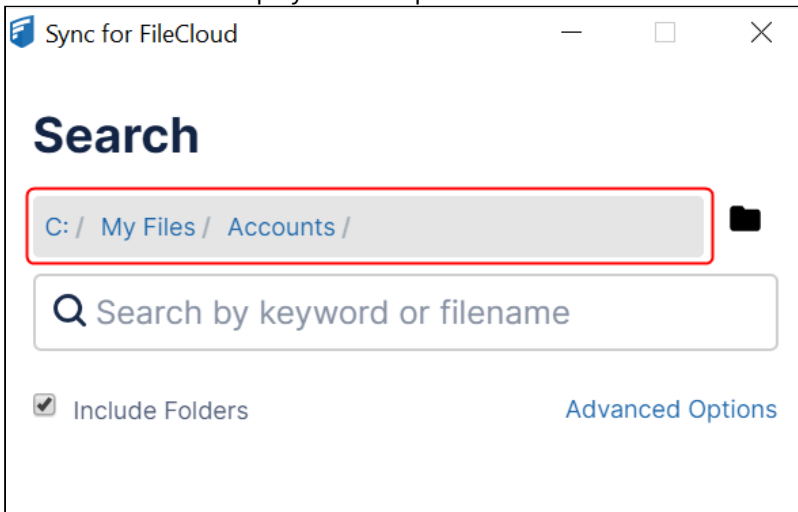




- Click the arrow to expand **All Paths**, and navigate to the folder you want to search.



- Click the folder.  
The Search window displays the new path:



## Content Search in Sync

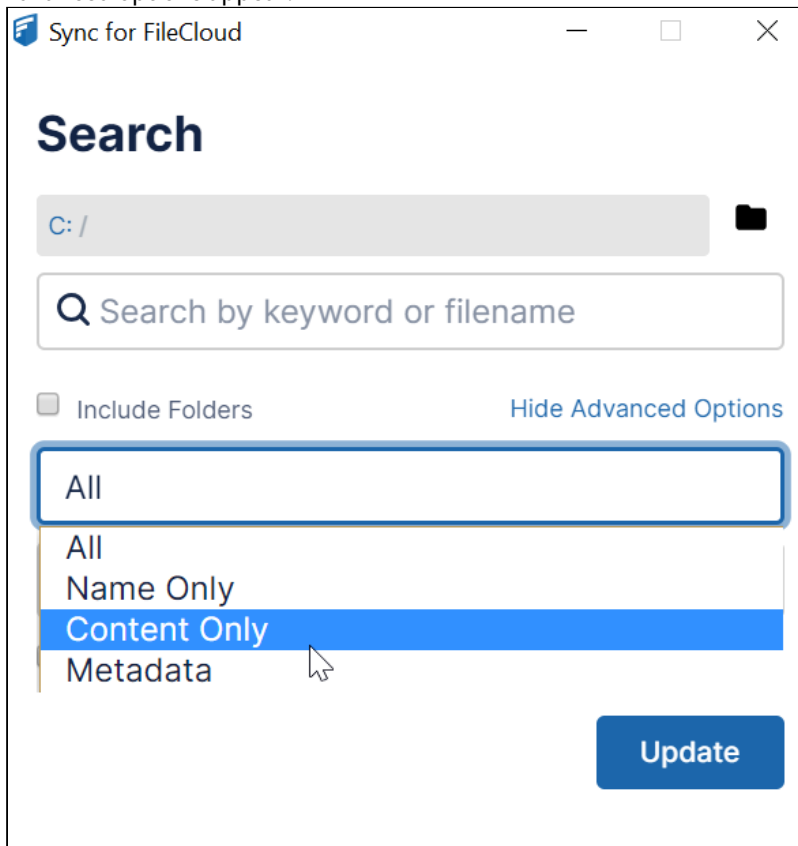
Content search enables you to search through the text in file types such as txt, pdf, doc, docx, xls, xlsx, ppt, and pptx.

Note that your admin must have configured [content search](#) in FileCloud for content searches to work.

Any files with matches are displayed with the link **Show Content Hit** below them.

To search in content:

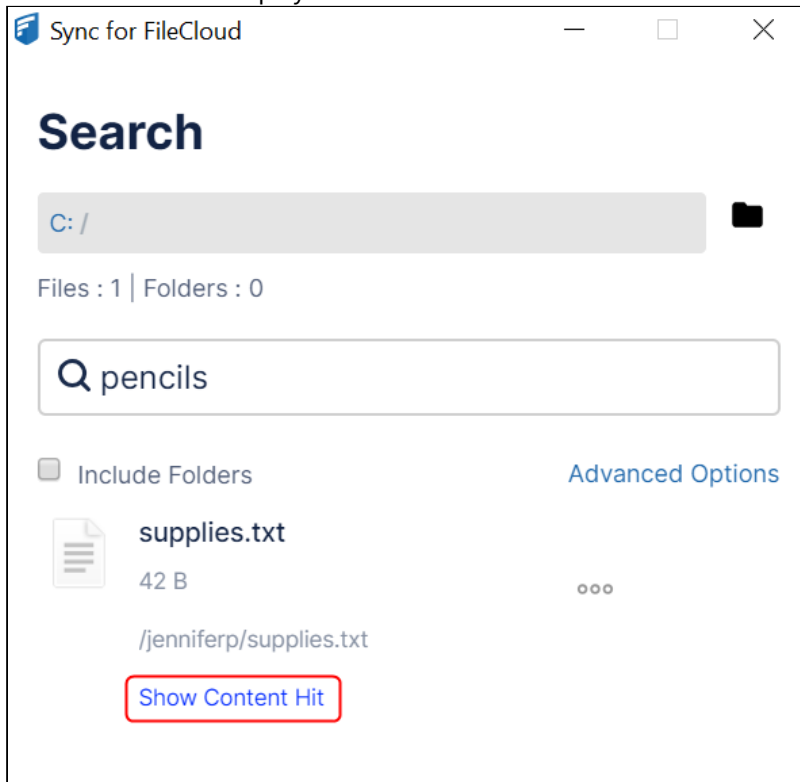
1. Access the Search window in Sync.
2. Click **Advanced Options**.  
Advanced options appear.



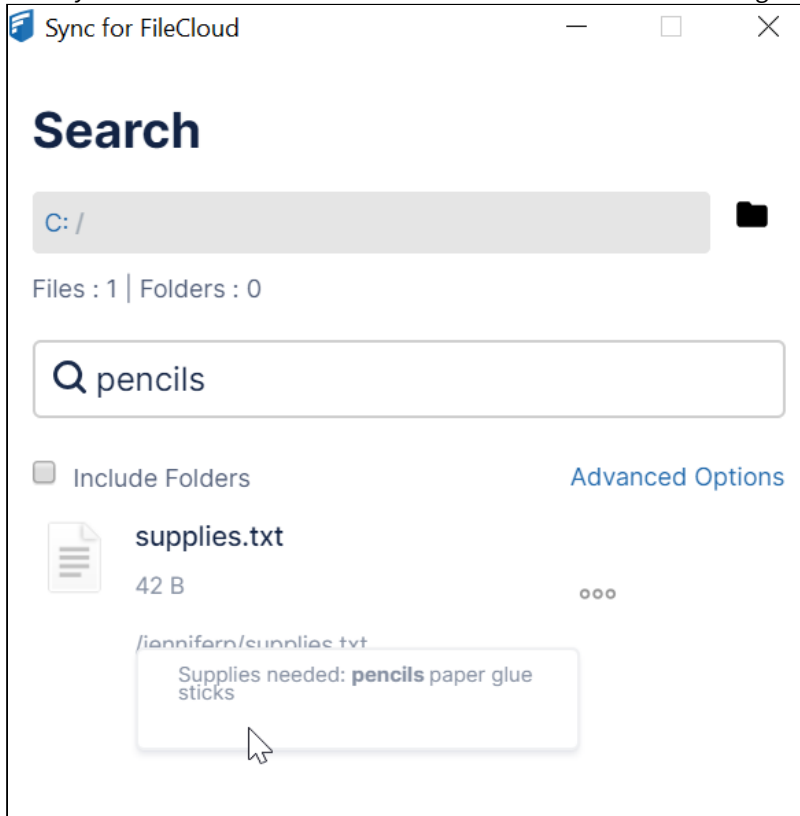
3. In the drop-down list, choose **Content Only**.
4. Enter a search term.

5. Click **Update**.

The Search window displays the results with the link **Show Content Hit** below each result.



6. Hover your cursor over **Show Content Hit** to view the text containing the search term:



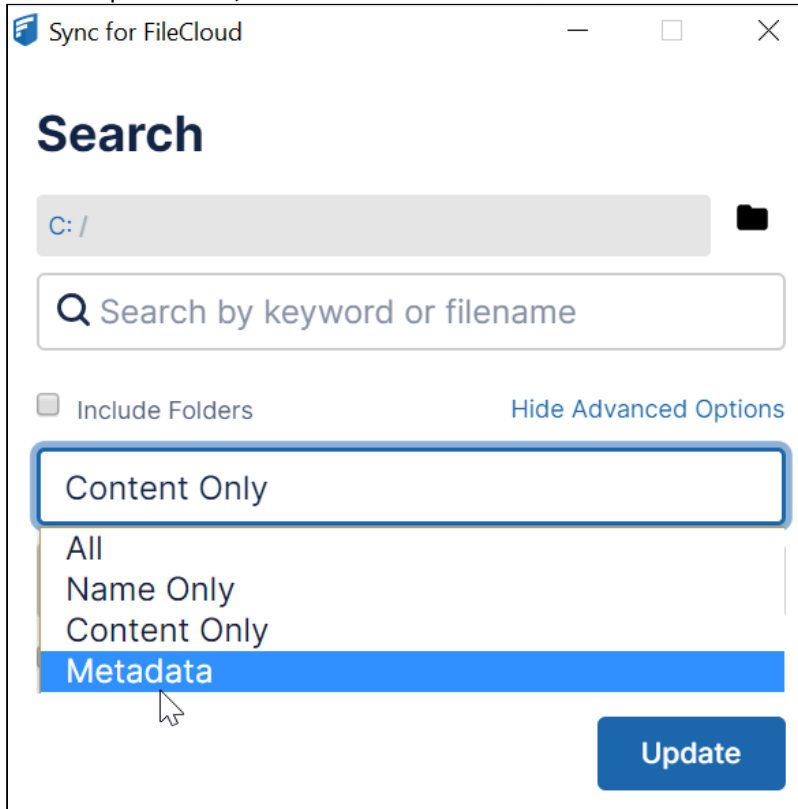
## Metadata Search in Sync

You can search on metadata from any of the metadata sets in Sync.

To search on metadata:

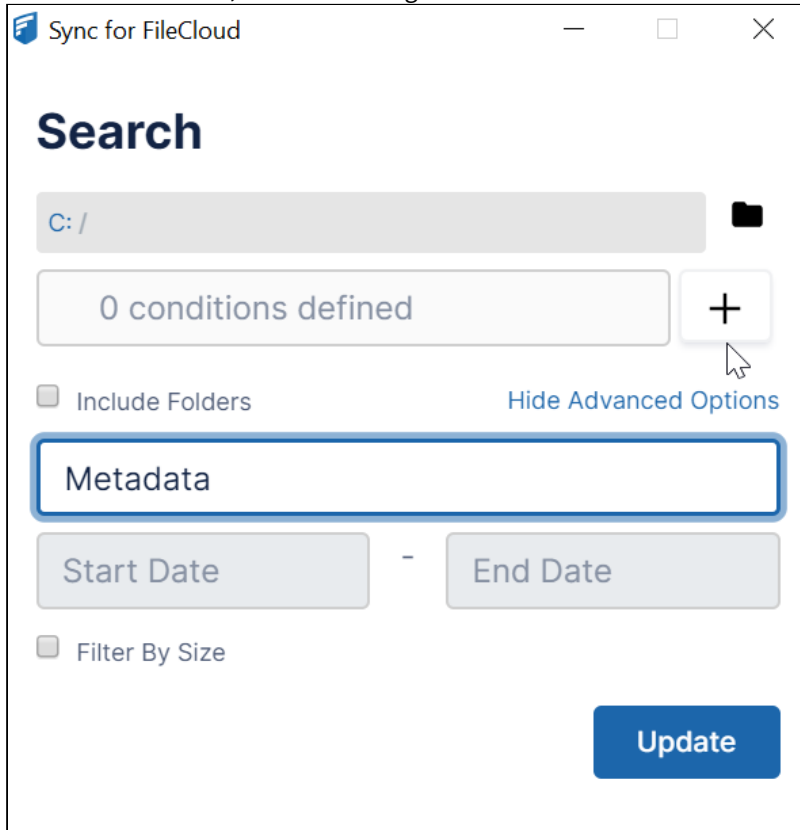
1. [Access the Search window in Sync.](#)
2. Click **Advanced Options**.  
Advanced options appear.

3. In the drop-down list, choose **Metadata**.



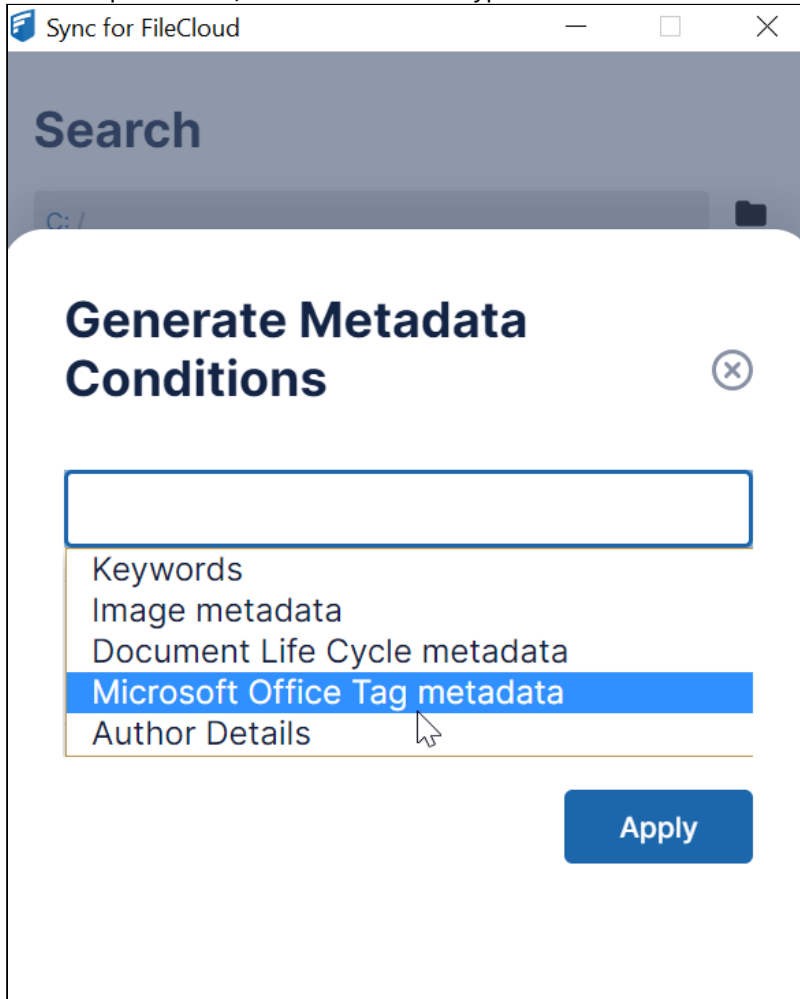
A **Conditions defined** field appears.

4. To define conditions, click + to the right of the field.



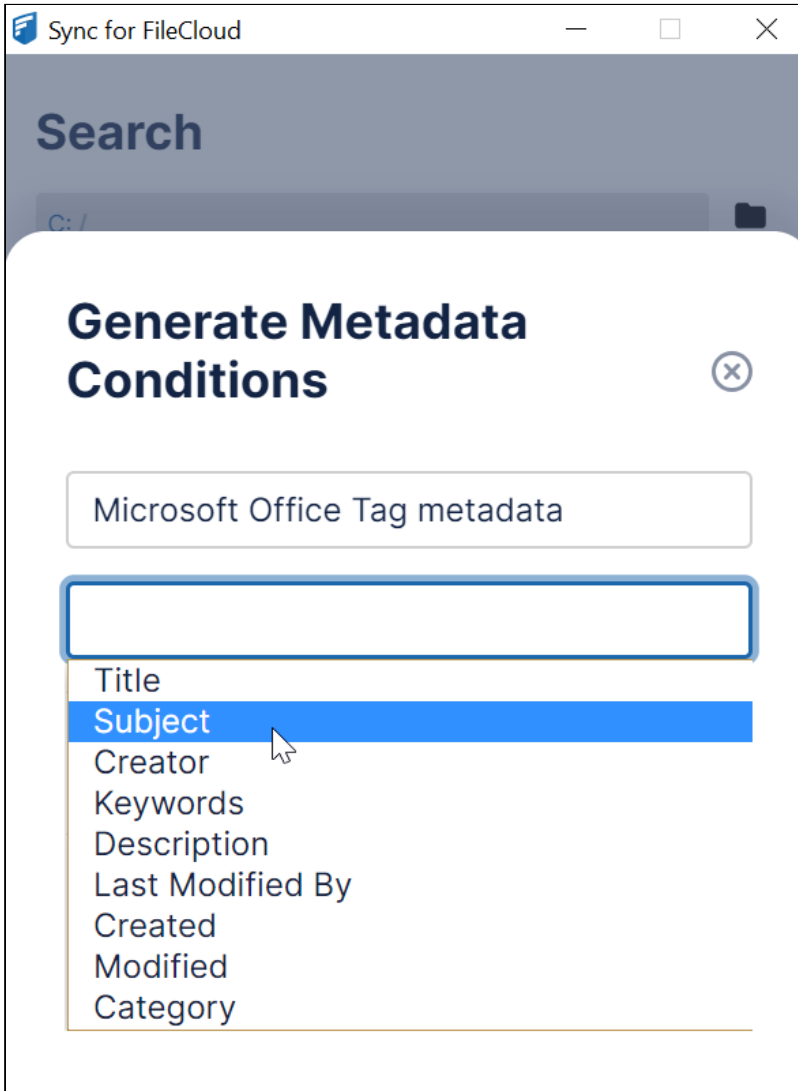
A **Generate Metadata Conditions** window opens. Add search conditions in this window.

5. In the drop-down list, choose a metadata type.



A drop-down list of the metadata type's attributes appears below it.

6. Choose an attribute.

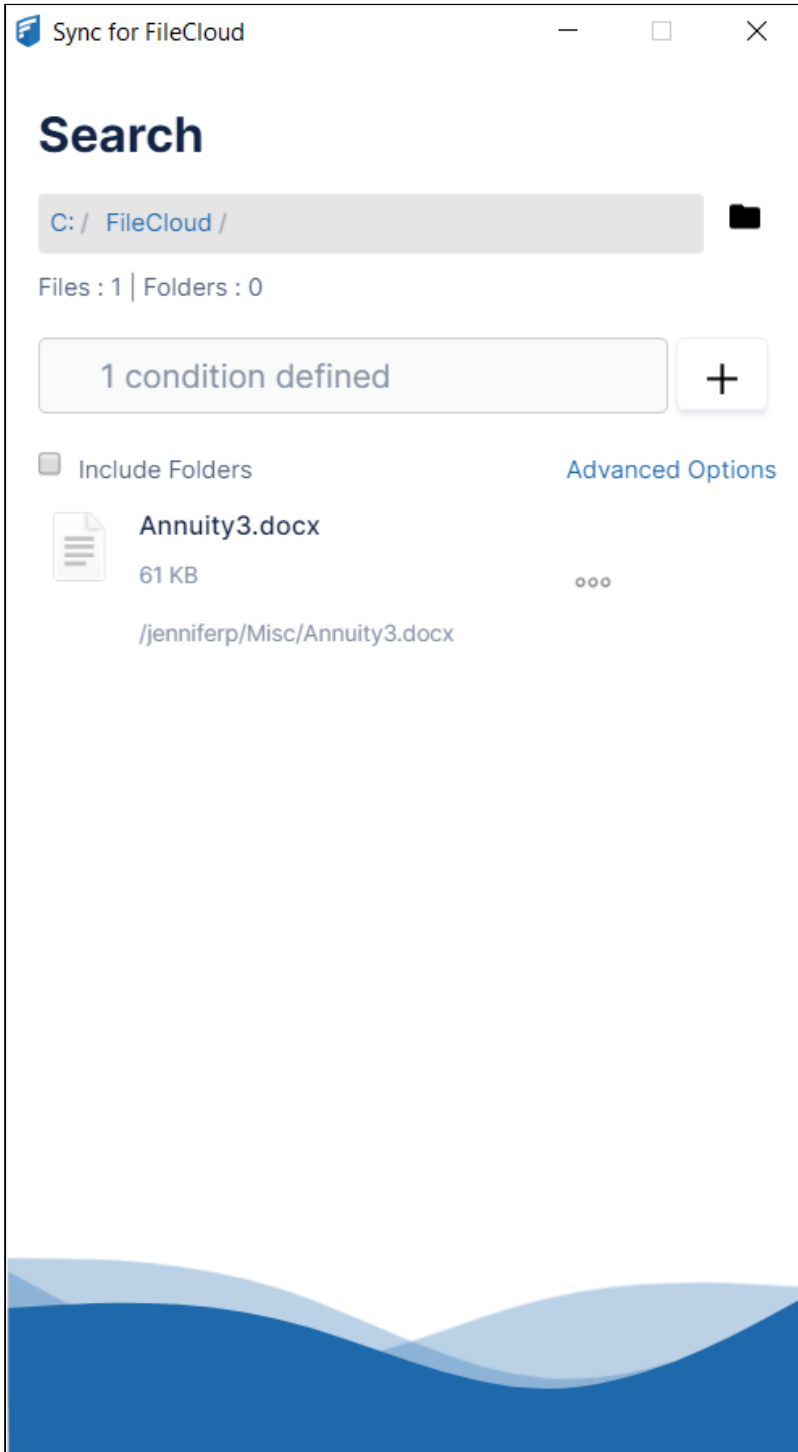




A field for the attribute value appears below it.

The screenshot shows a window titled "Sync for FileCloud" with a "Search" header. Below the header is a breadcrumb "C: / FileCloud /". The main content is a "Generate Metadata Conditions" dialog. It contains two input fields for conditions. The first field contains "Microsoft Office Tag metadata" and "Subject". The second field contains "Subject" and "Investments". An orange box highlights the "Subject" attribute field and the "Investments" value field. Below the input fields is an "Add" button. At the bottom of the dialog is a table with columns "Set", "Attribute", "Value", and "Clear". The table contains two rows: "Microsoft Office Tag metadata" with attribute "Subject" and value "Investments", and "Subject" with attribute "Investments" and value "s". An orange arrow points from the "Investments" value field to the "Apply" button.

7. Enter a value in the attribute field, and click **Add**.  
The value is case-sensitive.
8. Add any number of additional conditions, and click **Apply**.  
The search results are returned.

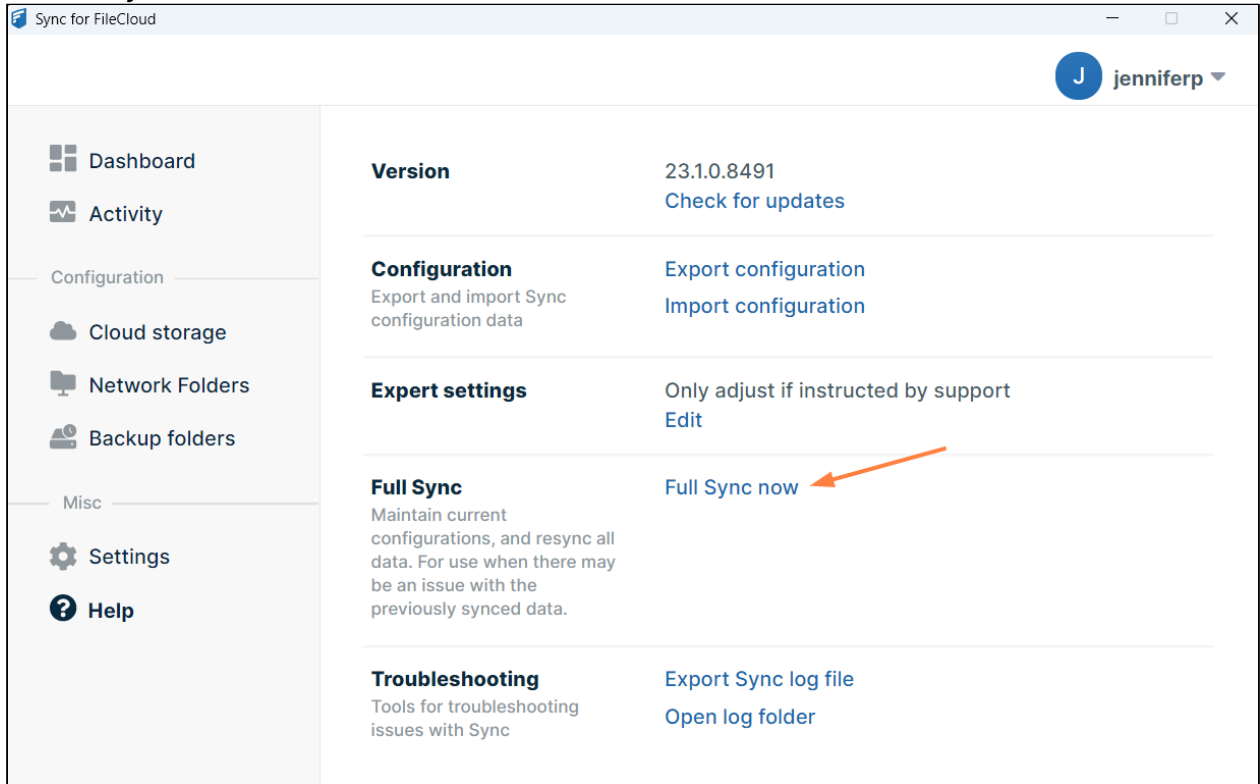


## Refreshing Sync

Users can refresh Sync from the Sync dashboard. Admins can refresh Sync for a particular user or users from the Device Management screen by entering a command.

### For users: Refresh Sync from the dashboard

1. To open the mini-dashboard, In your system tray, right-click on the Sync icon and choose **Open**.
2. To open the main dashboard, in the mini-dashboard, click **Dashboard**.
3. In the navigation panel, click **Help**.
4. Click **Full Sync Now**.



Files and folders are immediately re-synced.

**Refresh Sync Complete** appears at the bottom of the dashboard.

The screenshot shows the FileCloud Online dashboard interface. On the left is a navigation sidebar with categories: Dashboard, Activity, Configuration, Cloud storage, Network Folders, Backup folders, Misc, Settings, and Help. The main content area displays several sections: Version (23.1.0.8491, Check for updates), Configuration (Export and import Sync configuration data, Export configuration, Import configuration), Expert settings (Only adjust if instructed by support, Edit), Full Sync (Maintain current configurations, and resync all data. For use when there may be an issue with the previously synced data., Full Sync now), and Troubleshooting (Tools for troubleshooting issues with Sync, Export Sync log file, Open log folder). At the bottom of the dashboard, a blue notification bar displays 'Refresh Sync complete' with an information icon on the left and a close icon on the right. An orange arrow points to the notification text.

#### For admins: Refresh Sync from the admin portal

**⚠** This command only works correctly when run in the **Manage Devices** screen, as shown in this procedure. Do not use it by entering it into the **Device Configuration** tab of a policy, as this will cause the command to run and refresh Sync every 5 minutes.

1. Log in to the admin portal, and in the navigation panel, click **Devices**.
2. In the Manage Devices screen, select the check boxes of the Sync devices to refresh.

- In the upper-right corner of the screen, click **Command**.

The screenshot shows the FileCloud 'Manage Devices' page. The interface includes a sidebar on the left with navigation options like 'HOME', 'USERS / GROUPS', 'MANAGE', and 'GOVERNANCE'. The main area displays a table of devices with columns for Health, Type, User name, Device Name, Device Details, Last Access, Status, Access, Action, and Logs. The 'Command' button in the top right corner is highlighted with an orange arrow. The 'Device Management' option in the sidebar is also highlighted with an orange arrow.

Health	Type	User name	Device Name	Device Details	Last Access	Status	Access	Action	Logs
<input type="checkbox"/>		ncnp	iPhone	App version: OS: iOS -	At 02:30 PM on Mar 18 2022 from 127.0.0.1	Needs Admin Approval	Blocked	1	
<input type="checkbox"/>		tester	FileCloud Drive	App version: 19.2.0.2241 OS: Windows 8 - 6.2 (Build 9200)	At 07:23 AM on Oct 30 2020 from Wloclawek, Poland	Needs User Approval	Allowed	0	
<input type="checkbox"/>		madhan	FileCloud Drive	App version: 20.2.0.4524 OS: Windows 8 - 6.2 (Build 9200)	At 08:29 AM on Sep 19 2020 from Round Rock, United States	Needs User Approval	Allowed	0	
<input checked="" type="checkbox"/>		jennifer.perkins	Cloud Sync	App version: 22.1.0.7817 OS: Windows 10 - 10.0 (Build 19044)	Today at 01:29 PM from Dallas, United States	Approved	Allowed	0	
<input type="checkbox"/>		demo	iPhone 13	App version: 21.3.30 (975) OS: iOS - 15.5	Today at 09:27 AM from 2.138.143.95	Approved	Allowed	0	
				App version: 1.0 (1)	At 10:21 AM on Aug 01				

The **Send Config Command** dialog box opens.

- Enter the following xml:  

```
<cloudsync><refreshsync>1</refreshsync></cloudsync>
```

The screenshot shows the 'Send Config Command' dialog box. The text area contains the XML code: `<cloudsync><refreshsync>1</refreshsync></cloudsync>`. The 'Send' button is highlighted.

- Click **Send**.

**Full Sync now** and **Reset** (from the username drop-down list) are two different actions. **Full Sync now** clears your sync database and performs a new Sync without clearing your Sync configuration. **Reset** clears your configuration (the folders you have set up to sync) and also clears your sync database.

**Note:** Clicking [Sync Now](#) in the main dashboard or mini dashboard, performs an immediate sync of any changes so you don't have to wait for the automatic sync to run. It neither clears your Sync database nor clears your Sync configuration.

## View or Clear Log Messages in Sync

You can view log messages to troubleshoot Sync issues, or clear the log if the file is getting too large.

### To view log messages:

1. In your system tray, right-click the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Dashboard**.
3. In the navigation pane of the dashboard, click **Activity**.

The **Sync Activity** page opens. By default, **View** is set to **All**, and all Sync activities are listed.

The screenshot displays the 'Sync Activity' page within the 'Sync for FileCloud' application. The interface includes a navigation pane on the left with options like Dashboard, Activity, Cloud Storage, Network Folders, Backups, Settings, and Help. The main content area shows a table of sync activities. At the top right, there is a search bar and a 'View' dropdown menu currently set to 'All'. At the bottom, there are buttons for 'Clear Activities' and 'Export'.

Time	Activity
15:45 PM	Annuity3.docx (61 KB) My Files\Annuity3.docx
15:40 PM	Annuity2.docx (61 KB) My Files\Annuity2.docx
13:38 PM	bluemorpha.jpg (27 KB) My Files\bluemorpha.jpg
13:32 PM	AppleTrees.jpg (4.21 MB) My Files\AppleTrees.jpg
13:29 PM	tofuvermicelli.png (147 KB) My Files\tofuvermicelli.png

4. To view only certain types of log files, choose from the options in the **View** drop-down list.

The screenshot shows the 'Sync Activity' interface. At the top left is a search bar labeled 'Search Activity'. Below it is a table with two columns: 'Time' and 'Activity'. The table contains three entries:

Time	Activity
15:45 PM	Annuity3.docx (61 KB) ... My Files\Annuity3.docx
15:40 PM	Annuity2.docx (61 KB) ... My Files\Annuity2.docx
13:38 PM	bluemorpho.jpg (27 KB) ... My Files\bluemorpho.jpg

To the right of the table is a 'View' dropdown menu, which is highlighted with a red box. The dropdown menu is currently set to 'Uploaded' and shows a list of options: 'Uploaded', 'Downloaded', 'Errors', and 'Skipped (All)'.

The full list of options in the **View** drop-down list is:

- All
- Uploaded
- Downloaded
- Errors - You can resolve errors in this view. See [Resolve conflicts in Sync](#).
- Skipped (All)
- Skipped (My Files)
- Skipped (Network Folders)
- Skipped (Backup Folders)
- Skipped (Root Folder)

**Note:** For more information about skipped files, see [Reviewing Skipped Files](#).

5. To search for a file in your current view, enter a string into the search bar.

**To export activities:**

- To export a spreadsheet file of the list of files in your current view, click **Export**.

**To clear the log file:**

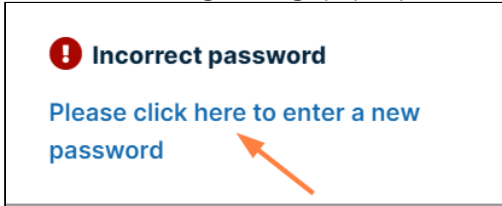
1. On the **Activity** screen, click **Clear Activities**.  
This clears all entries from the log, not just the entries for the current view.

## Updating a Changed Password in Sync

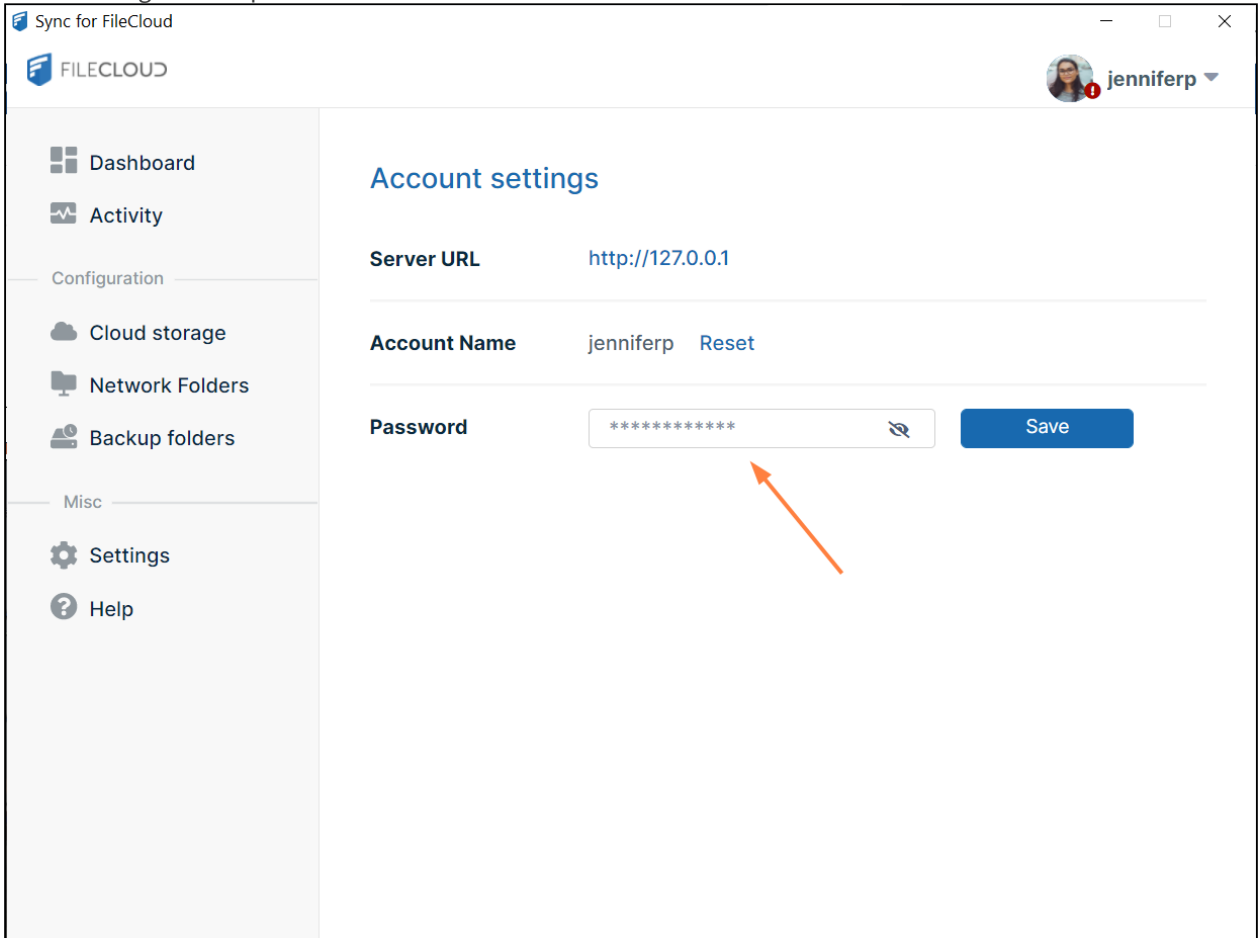
If your password is updated outside of Sync while you are working in Sync, a message tells you that you must enter the changed password.

**To update to the changed password so you can continue working in Sync:**


1. When the following message pops up, click on the text:



The following screen opens:



2. Enter the changed password into **Password** and click **Save**.  
A message that Sync has saved the password and is validating it appears.
3. Continue working in Sync.

 The **Password** field on the **Account Settings** screen cannot be used to change your password from Sync; you can only use it to update your password in Sync after it has been changed outside of Sync.

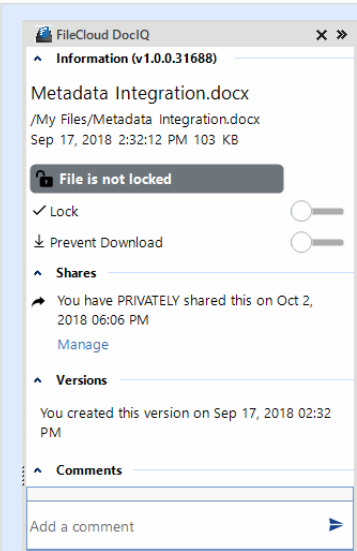


## Using DocIQ with Office for Sync Users

**⚠ New FileCloud Sync users:** DocIQ has been replaced with FileCloud for Office. Please see the [FileCloud for Office with Sync documentation](#).

**Current FileCloud Sync users (DocIQ users):** FileCloud no longer supports DocIQ. Later this year, DocIQ will be fully deprecated. Although you can continue to use DocIQ with the current release, we recommend using FileCloud for Office, which can be downloaded from the Office add-ins store. Now, when you upgrade FileCloud Sync, you are given the choice of using FileCloud for Office or continuing to use DocIQ. If you choose to use FileCloud for Office, please see the [FileCloud for Office with Sync documentation](#).

DocIQ is a Microsoft Office add-in for FileCloud Sync and FileCloud Drive clients.



DocIQ works with the following Microsoft Office applications:

- Word
- Excel
- PowerPoint

**What does DocIQ do?**

DocIQ works with Office documents to help you manage shared files.

DocIQ gives you the ability to:

- manage file locking
- collaborate with your colleagues through comments
- see how shared files are being managed

**How do I use DocIQ?**

1. You open an Office application such as Word, Excel or PowerPoint.
2. Inside the Office application, you open a file saved to a FileCloud Sync or FileCloud Drive folder.
3. DocIQ displays as a task panel inside the Office application with the following information:
  - File details
  - Lock status
  - File sharing details
  - Comments attached to the file

**How do I install and work with DocIQ?**

1. [Install DocIQ with Sync.](#)
2. [Configure DocIQ for Sync.](#)
3. [Work with file locking.](#)
4. [Troubleshoot Doc IQ issues.](#)

## Install DocIQ with Sync

**For users who begin using FileCloud in version 23.1 or users who have not used DocIQ previously:** You will not see an option to install DocIQ when you install or upgrade FileCloud Sync. Instead, you will be given the option of installing [FileCloud for Office](#).

**Current FileCloud Sync users (DocIQ users):** Later this year, DocIQ will be deprecated, and FileCloud will no longer support it. Although you can continue to use DocIQ, we recommend using FileCloud for Office, which can be downloaded from the Office add-ins store. Now, when you upgrade FileCloud Sync, you are given the choice of using FileCloud for Office or continuing to use DocIQ. If you choose to use FileCloud for Office, please see the [Using FileCloud for Office with Sync](#) documentation.

DocIQ allows you to easily manage FileCloud options for a file directly in Microsoft Office applications.

To install DocIQ, you just need to update your FileCloud Sync software to the latest version.

 [Install FileCloud Sync](#)

## FAQ's

### Do I need to do anything before installing it?

It's easy! Just make sure you have this:



Microsoft Office - Version 2007 or later



for Windows

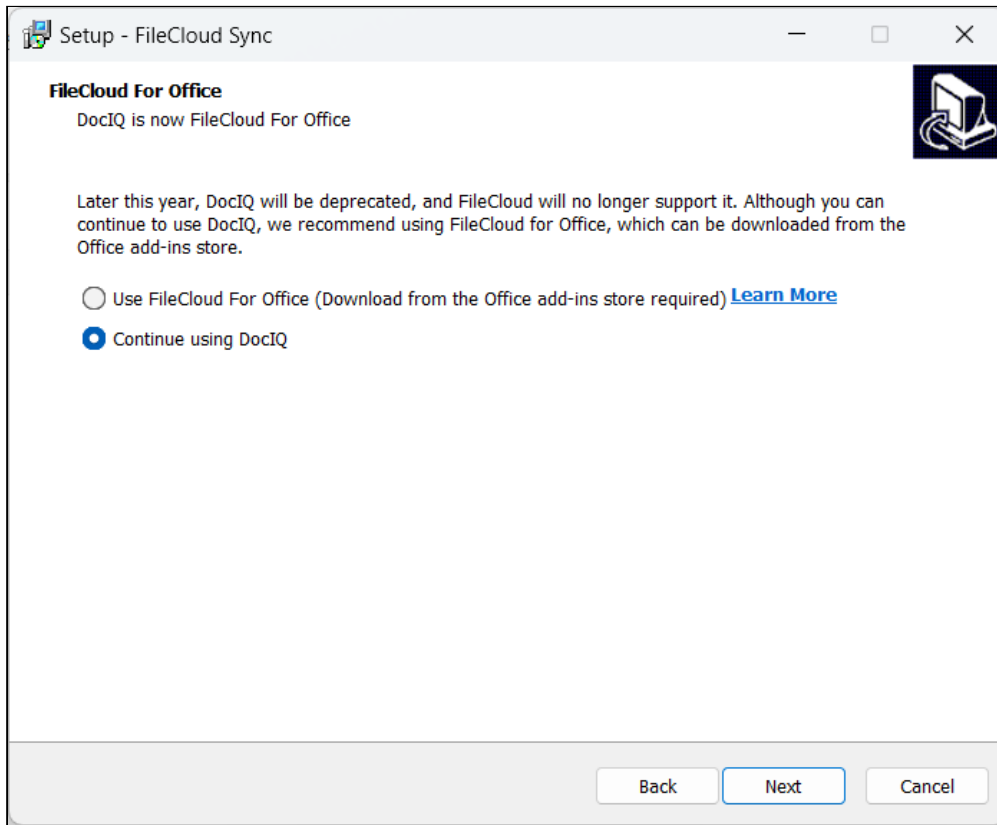


DocIQ does not support Microsoft Office for Mac OS. If you are a macOS user, install [FileCloud for Office \(FFO\)](#).

### How do I continue to use it?

You may continue to use DocIQ when you update the FileCloud Sync Client.

When you reach this screen in the setup wizard, choose **Continue using DocIQ**.



➔ Install [FileCloud Sync](#)

### Where is DocIQ installed on my computer?

DocIQ is installed in the following folder:

```
program files(x86) / DocIQ
```

### Configure DocIQ for Sync



DocIQ gets all configuration information from FileCloud Sync and Drive.

For example, when a file is opened from Sync, DocIQ will know which FileCloud account you are using.

- This allows DocIQ to show you information about the file that is uploaded to the FileCloud Server site in the Office application.




There are a few properties that can be configured in Sync and Drive for DocIQ:

Option	Description	How to Configure
--------	-------------	------------------

 <p>Enable or Disable DocIQ Integration</p>	<p>This option removes the DocIQ panel that is shown in a Microsoft Office application after DocIQ is installed and enabled.</p> <p>This option is useful if you only need to disable DocIQ for a short time while troubleshooting computer issues.</p> <p>This option does not permanently remove DocIQ. To remove DocIQ, you have the following options:</p> <ul style="list-style-type: none"> <li>• uninstall Sync or Drive</li> <li>• use the Windows Programs Control Panel to remove DocIQ</li> </ul>	<ol style="list-style-type: none"> <li>1. In your system tray, right-click on the Sync icon and choose <b>Open</b>.</li> <li>2. At the bottom of the mini-dashboard, click <b>Settings</b>. The <b>Settings</b> page opens in the main dashboard.</li> <li>3. Beside Miscellaneous, disable DocIQ by unchecking <b>DocIQ Office integration</b>.</li> <li>4. To enable DocIQ again, check <b>DocIQ Office integration</b>.</li> </ol> <p>This configuration can be set in the admin portal (via centralized device configuration) using the following command:</p> <pre>&lt;cloudsync&gt; &lt;officehelperdisabled&gt;0&lt;/ officehelperdisabled&gt; &lt;/cloudsync&gt;</pre> <p>Setting this value to 0 will enable DocIQ automatically, and setting it to 1 will disable DocIQ automatically.</p>
 <p>Automatically enable Lock on file open</p>	<p>This creates the following scenario:</p> <ul style="list-style-type: none"> <li>• When a supported file from Sync or Drive is opened</li> <li>• DocIQ will automatically attempt to lock the file, with read allowed status.</li> </ul>	<ol style="list-style-type: none"> <li>1. In your system tray, right-click on the Sync icon and choose <b>Open</b>.</li> <li>2. At the bottom of the mini-dashboard, click <b>Settings</b>. The <b>Settings</b> page opens in the main dashboard.</li> <li>3. Beside <b>Miscellaneous</b>, disable automatic locking in DocIQ by unchecking <b>Automatic locking in DocIQ</b>.</li> <li>4. To enable automatic locking in DocIQ again, check <b>Automatic locking in DocIQ</b>.</li> </ol> <p>This configuration can be set in the admin portal (via centralized device configuration) using the following command:</p> <pre>&lt;cloudsync&gt; &lt;officehelperlockonedit&gt;1&lt;/ officehelperlockonedit&gt; &lt;/cloudsync&gt;</pre> <p>Setting this value to 1 will enable locking automatically, and setting it to 0 will disable locking automatically.</p>

## Work with DocIQ File Locking in Sync

You can use file locking to:

-  See if you have the file locked for editing
-  Easily turn locking on and off
-  Prevent or enable downloads of this file

Locking is critical for shared files, since another user can also open the file and make changes.

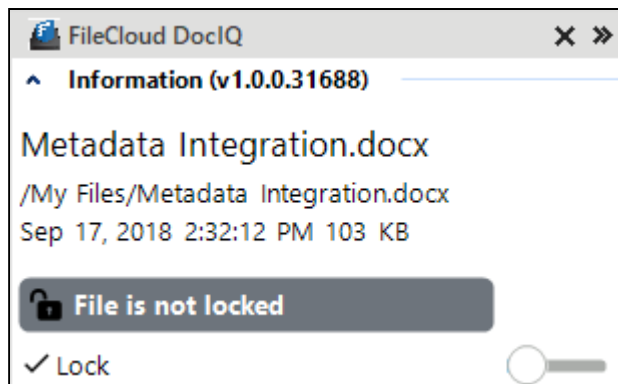
- When one user opens a file, DocIQ automatically locks the file for editing.
- The lock is shown right in the Office application you are using to edit the file.

## FAQ's

### How do I know the status of a lock?

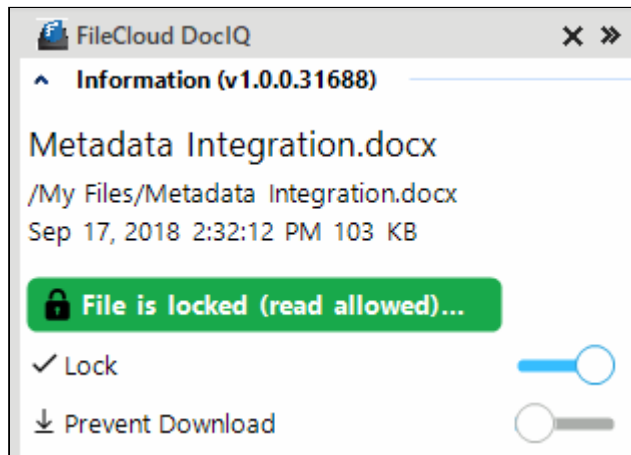
To see the lock status:

1. In a Microsoft Office application, open a file saved to your Sync folder.
2. In the DocIQ panel, under the file name, location, and date information, you can see the lock status.



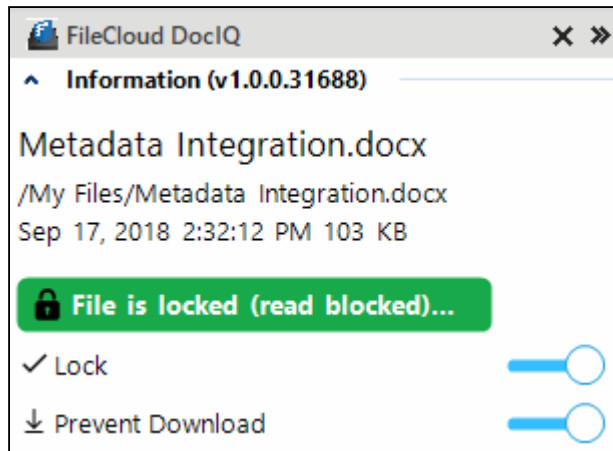
File is not locked when:

- Lock is OFF



File is locked (read allowed) when:

- Lock is ON
- Prevent Download is OFF



File is locked (read blocked) when:

- Lock is ON
- Prevent Download is ON

The following table describes what each lock status means and how it impacts what you can do with the file and others you have shared it with.

Lock Status	Access by lock owner	Access by others
File is locked (read allowed)	Read and Modification allowed	Only read is allowed, no modification is allowed

Lock Status	Access by lock owner	Access by others
File is locked (read blocked)	Read and Modification allowed	No Read and Modification is allowed
File is not locked	Read and Modification allowed	Read and Modification allowed

### When does the lock status change?

In the following scenario:

- When a supported file from Sync or Drive is opened
- When automatic lock on an open file is enabled

DocIQ will automatically attempt to lock the file, with read allowed status.

#### For a file with a Read Blocked status:









If USER1 has locked (read blocked) the file:









- FileCloud Sync will not download the file for USER2

However, if USER2 has already downloaded the file, then:

- FileCloud Sync will allow DocIQ to open the file
- FileCloud Drive will not allow the file to be opened by USER2, unless Drive has already cached the file

You can use the following table to understand the status of lock:

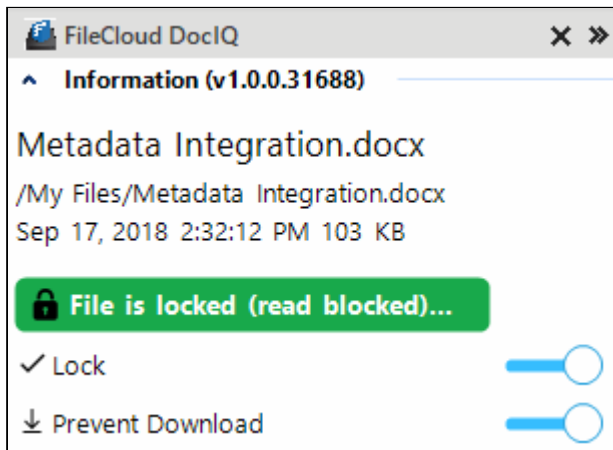
Action	Doc IQ Lock Enabled	Prevent Download	Lock Status Before Open	Lock Status After Open	Lock Status After close
An unlocked file is opened by USER1			File is not locked	File is locked (read allowed) by USER1	File is not locked
An unlocked file is opened by USER1			File is not locked	File is not locked	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (Read Allowed) by USER1	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (Read Allowed) by USER1	File is not locked

Action	Doc IQ Lock Enabled	Prevent Download	Lock Status Before Open	Lock Status After Open	Lock Status After close
A file locked by USER1 is opened by USER1			File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1	File is not locked
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1

 Note that you cannot enable *Prevent Download* unless *DocIQ Lock* is also enabled.

### How can I prevent another using from downloading a file I am working on?

When you lock a file, you can block other users from reading the file by enabling Prevent download.



 Note that you can not enable *Prevent Download* unless *DocIQ Lock* is also enabled.

If another user, USER2, attempts to download the file, USER2 will see the following conditions:

- The file cannot be downloaded from the FileCloud User Portal



- FileCloud Sync will not download the file that is locked and read-blocked.
- FileCloud Drive will not open the file that is locked and read-blocked.
- DocIQ will open the file from a Sync path when file is already available in the Sync client (previously downloaded).
- DocIQ will open the file from a Drive path when the Drive client allows a file to be opened.

## Troubleshoot DocIQ in Sync

DocIQ is very straightforward to install, configure, and use.

If you encounter issues, try using these troubleshooting tips.

### Tips for general issues

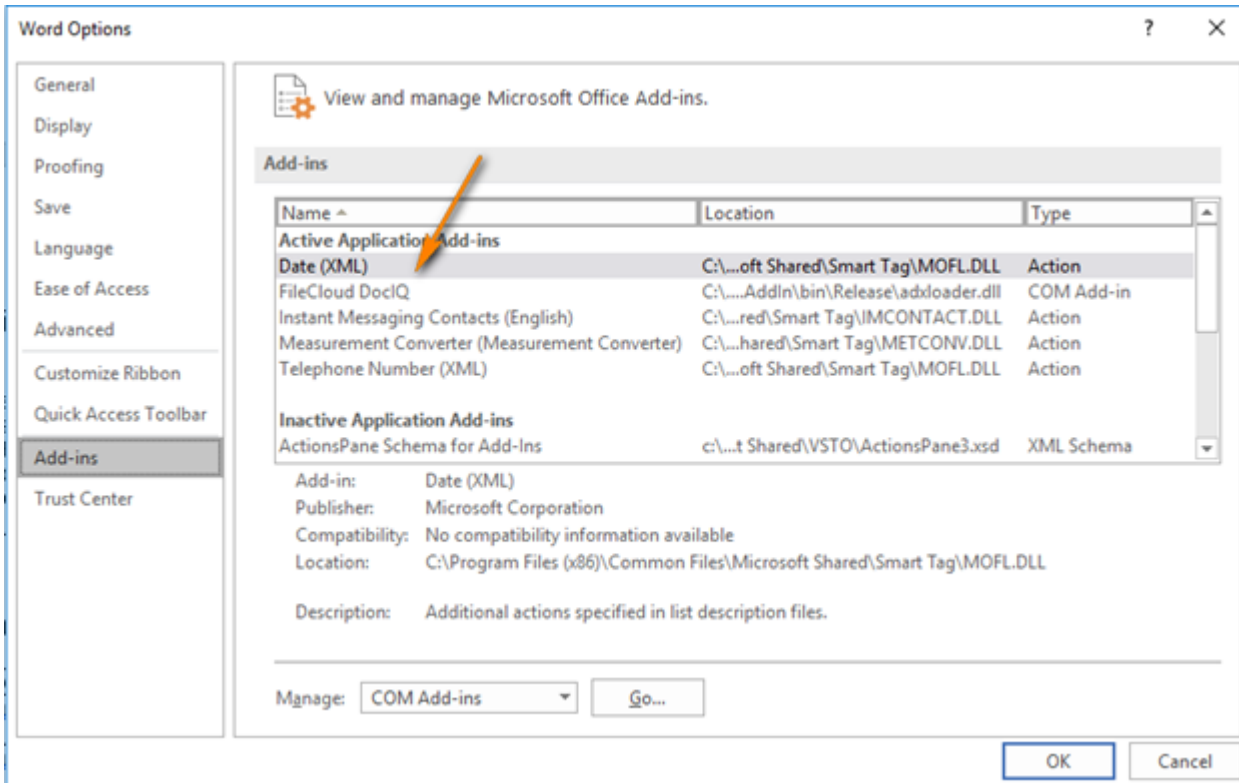
Review the DocIQ Log files

DocIQ logs are found in %appdata%/DocIQ/data/DocIQaddin.log

### DocIQ is not displayed in your Office app

Check if DocIQ office integration is enabled in Sync/Drive Path:

1. Check if the file you opened is in a Sync or Drive folder
2. Reconnect to Drive or Sync.
  - a. From the System Tray, right-click the FileCloud icon, and select **Exit**; then [start Sync](#) again.
3. In an Office application, such as Word, open File Options
  - a. From the menu, select File, then Options.
  - a. In Add-ins, under Active Application Add-ins verify that FileCloud DocIQ is listed.



### DocIQ cannot get file details

Check if file is available in FileCloud by logging into the FileCloud User Portal.


➔ [Logging in to the User Portal](#)

To temporarily disable DocIQ to troubleshoot other computer issues, you can

➔ [Configure DocIQ for Sync](#)


If you need to, you can uninstall DocIQ in the following ways:

### From the Windows Control Panel

1. Next to the Start button (  ), in the search box, type *Control Panel*.
2. From the results, select *Control Panel*.
3. Select *Programs and Features*, and then select *DocIQ*.
4. At the top of the list, next to Organize, click *Uninstall*.


### Uninstall the Sync application

DocIQ will be uninstalled when Sync application is uninstalled.


1. Next to the Start button (  ), in the search box, type *Control Panel*.
2. From the results, select *Control Panel*.
3. Select *Programs and Features*, and then select *FileCloudSync*.
4. At the top of the list, next to *Organize*, click *Uninstall*.

### Uninstall the Drive application

DocIQ will be uninstalled when Drive application is uninstalled.

1. Next to the Start button (  ), in the search box, type *Control Panel*.
2. From the results, select *Control Panel*.
3. Select *Programs and Features*, and then select *FileCloudDrive*.
4. At the top of the list, next to *Organize*, click *Uninstall*.

## Using FileCloud for Office with Sync

 FileCloud for Office is an MS Office add-in for Word, Excel, and PowerPoint which can be used in both Windows and macOS with FileCloud Sync, FileCloud Drive, and FileCloud Desktop. It is available in FileCloud beginning with version 23.1.

For instructions on how to install FileCloud for Office, see [Using FileCloud for Office](#).

If you have been using FileCloud Sync with DocIQ, see the instructions [for previous users of DocIQ](#) at the bottom of this page.

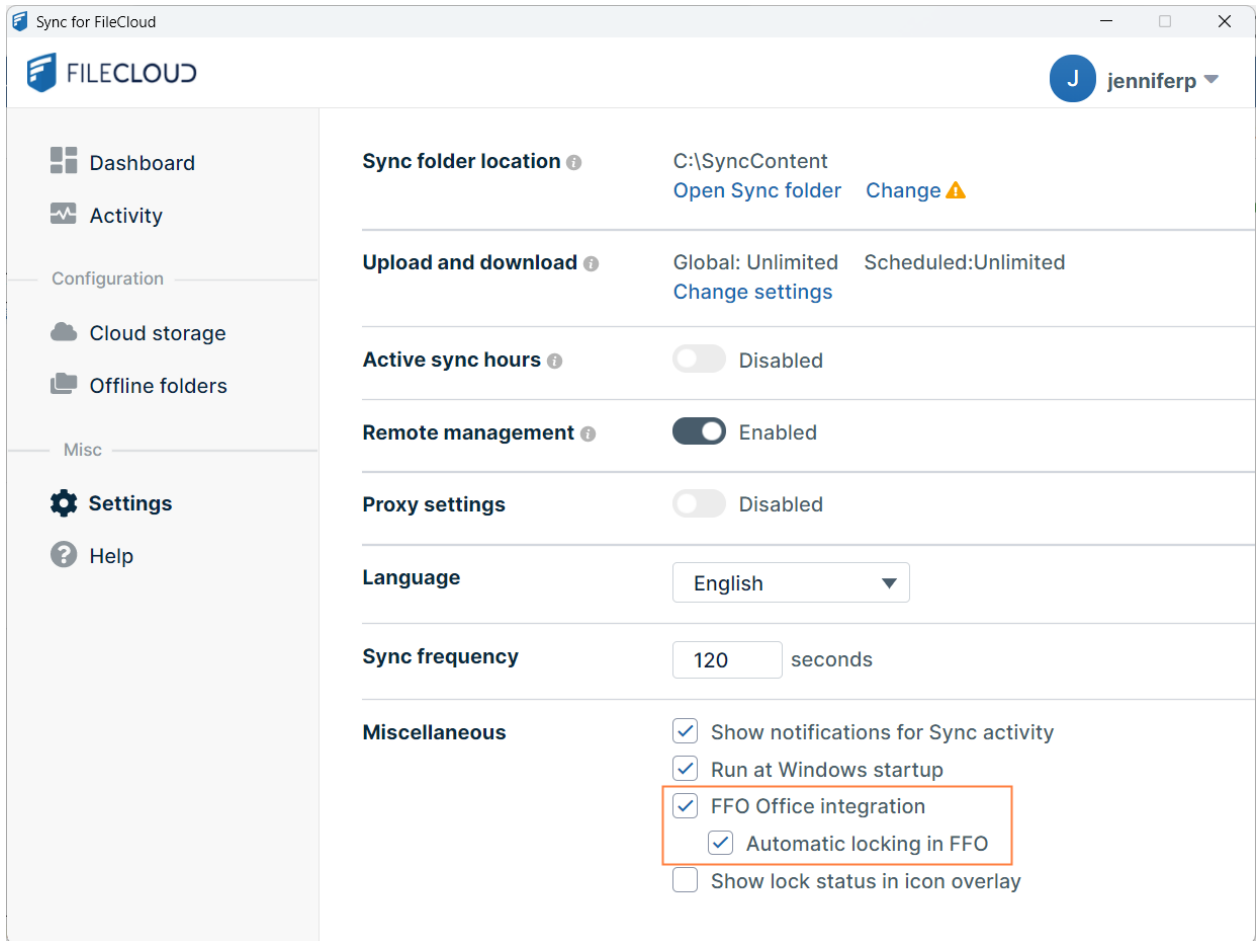
### Before using FileCloud for Office with Sync

The first time you install Sync or upgrade Sync to use FileCloud for Office you must confirm that you trust FileCloud for Office.

#### To confirm that you trust FileCloud for Office:

1. After you log in to FileCloud Sync, click the **Settings** tab.
2. Click the **Trust FFO** button.

The **Trust FFO** button disappears, and the checkboxes for **FFO Office integration** and **Automatic locking in FFO** are automatically checked:



FileCloud for Office is now enabled in Sync, but to use it in Office files, you must [include the add-in](#) in each type of Office file (Word, Excel, and PowerPoint) in your FileCloud Sync directory.

**Note:** To use FileCloud for Office without the automatic locking feature, uncheck **Automatic locking in FFO**.

## Working with FileCloud for Office in Sync

The FileCloud for Office task panel displays information about a file and enables you to:

- Lock or unlock a file.
- Prevent or allow download of a file while locked.
- Share a file.
- Manage file versions, and view file details and metadata.

### Lock or unlock a file

#### Locking and unlocking files

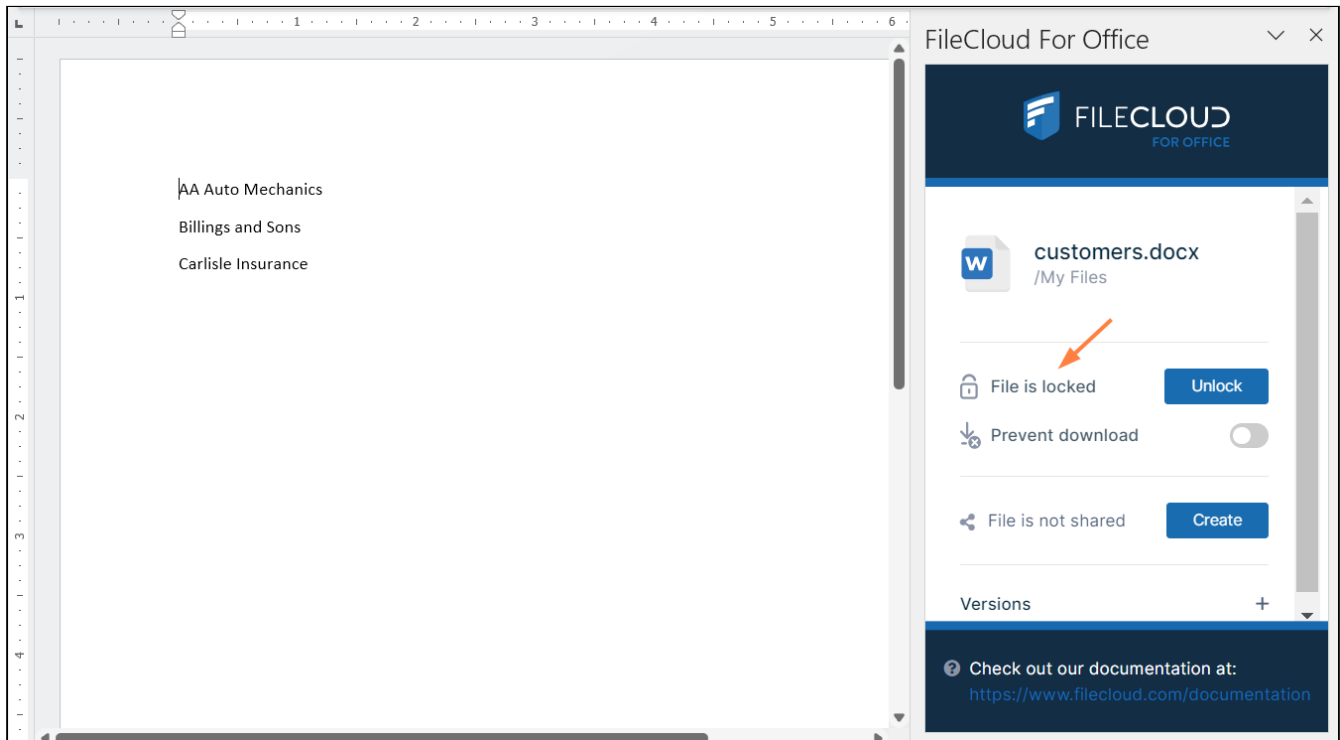
You can use the file locking function in FileCloud for Office to:

- See if you have a file locked for editing
- Turn a file lock on or off
- Prevent or enable downloads of a locked file

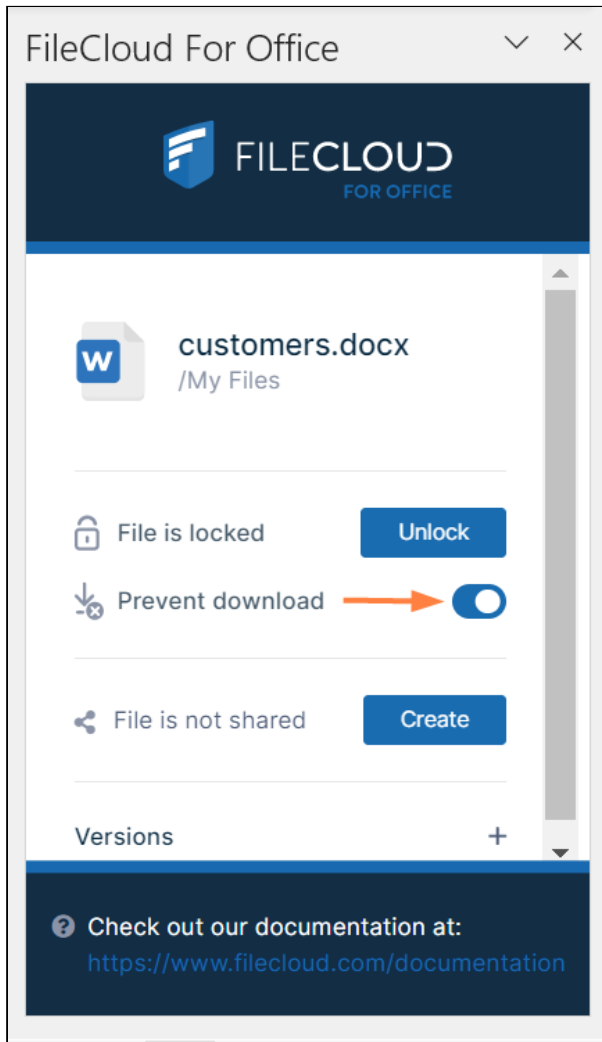
If a shared file is not locked when you open it for edit, another user can also open the file and make changes.

To avoid this, by default, FileCloud for Office automatically locks files for editing when they are opened.

When you open an Office file in your client directory, the FileCloud for Office panel shows **File is locked**, and by default, users are allowed to download or read the file (**Prevent download** is disabled).

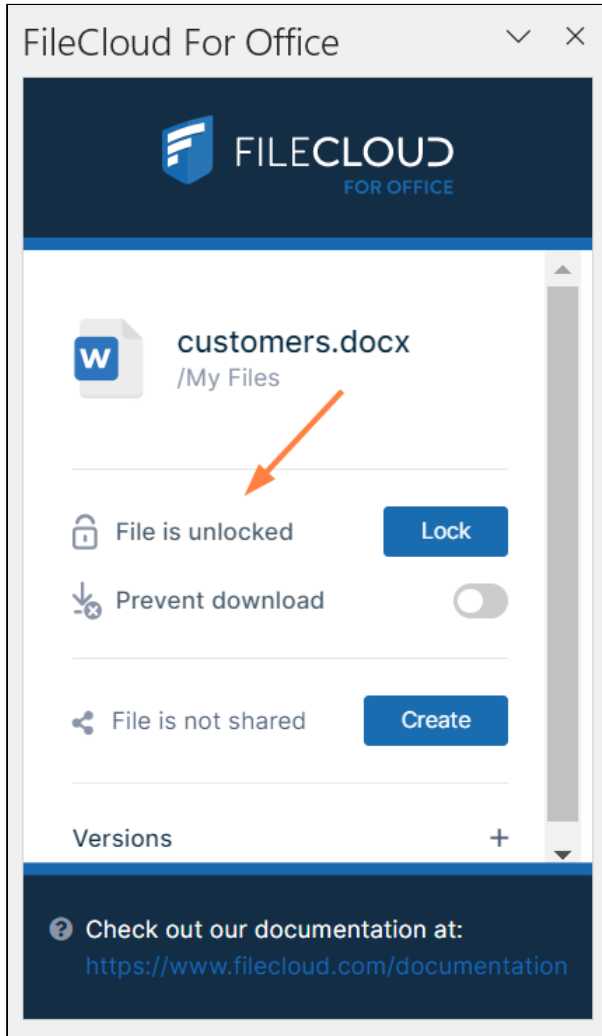


- To prevent other users from downloading or reading the file while it is locked, click the **Prevent download** slider.



- To unlock the file while you have it opened for edit, click **Unlock**. Now other users can modify as well as view and download the file.

**Note:** Prevent download cannot be enabled when the file is unlocked.



The following table describes what each lock status means and how it impacts what you and others you have shared the file with can do with the file.

Lock Status	Access by lock owner	Access by others
File is locked (download allowed)	Read and modification allowed	Only read is allowed, no modification is allowed
File is locked (download prevented)	Read and modification allowed	Neither read nor modification is allowed
File is not locked	Read and modification allowed	Read and modification allowed

**For a locked file with download (read) prevented:**

If USER1 has locked (and read blocked) the file:

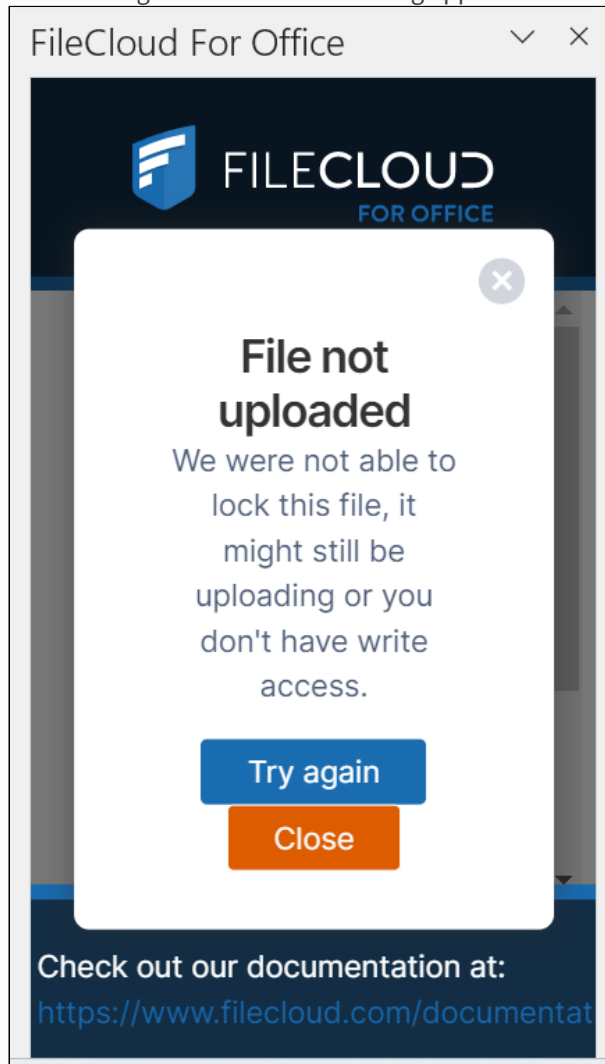
- The FileCloud client will not download the file for USER2

However, if USER2 has already downloaded the file in Sync or Drive, then:

- FileCloud Sync will allow FileCloud for Office to open the file.
- FileCloud Drive will not allow the file to be opened by USER2, unless Drive has already cached the file.

**If an admin prevents file locking after a user has locked a file in a client:**

















- The lock is automatically removed from the file
- Additional files cannot be locked using FileCloud for Office, and when you attempt to lock a file, an error message similar to the following appears:



If you are an admin and want to disable locking, see [Managing User Locks](#).

You can use the following table to understand the status of lock:



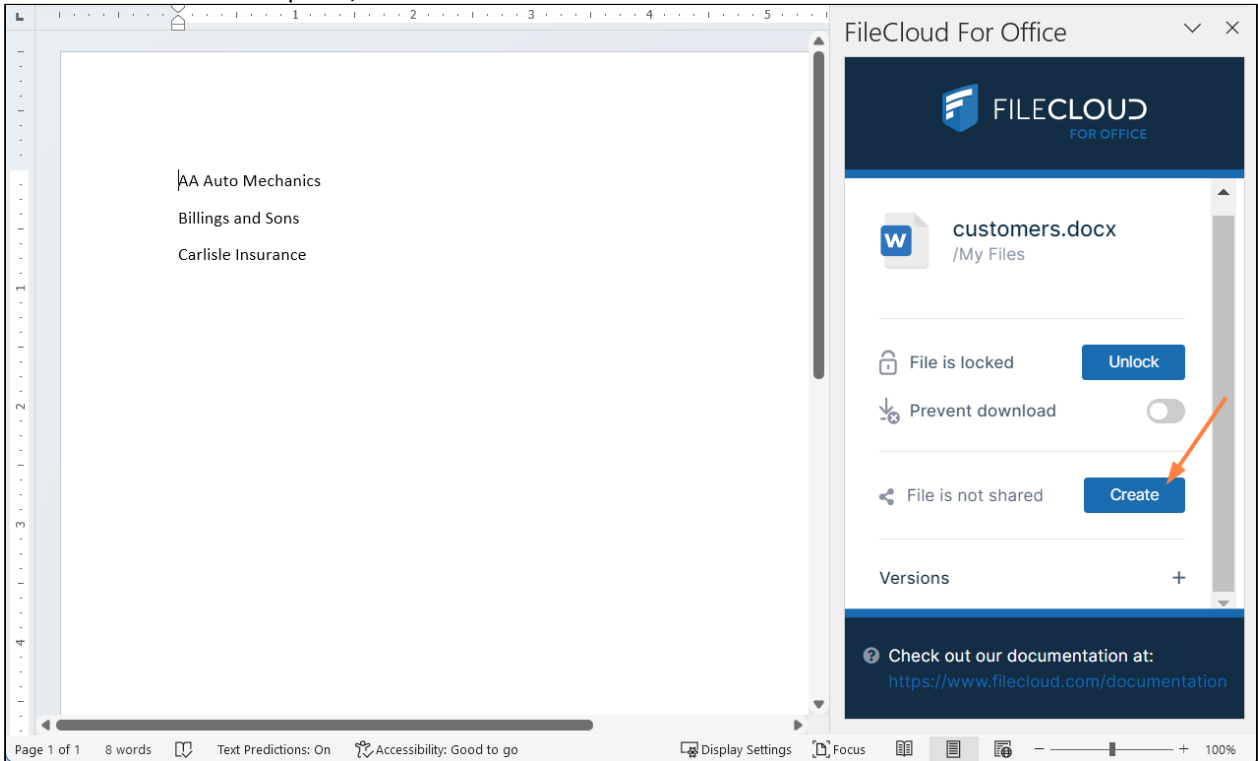
Action	Doc IQ Lock Enabled	Prevent Download	Lock Status Before Open	Lock Status After Open	Lock Status After close
An unlocked file is opened by USER1			File is not locked	File is locked (read allowed) by USER1	File is not locked
An unlocked file is opened by USER1			File is not locked	File is not locked	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (Read Allowed) by USER1	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (Read Allowed) by USER1	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1	File is not locked
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1

## Share a file

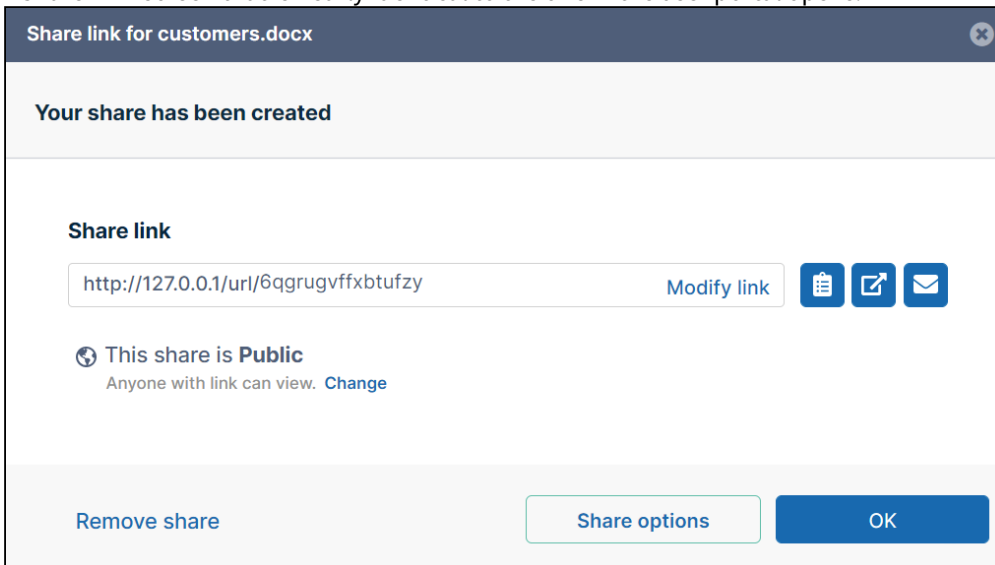
### Sharing a file

**To share a file or folder that is opened with FileCloud for Office:**

1. In the FileCloud for Office panel, click **Create**.



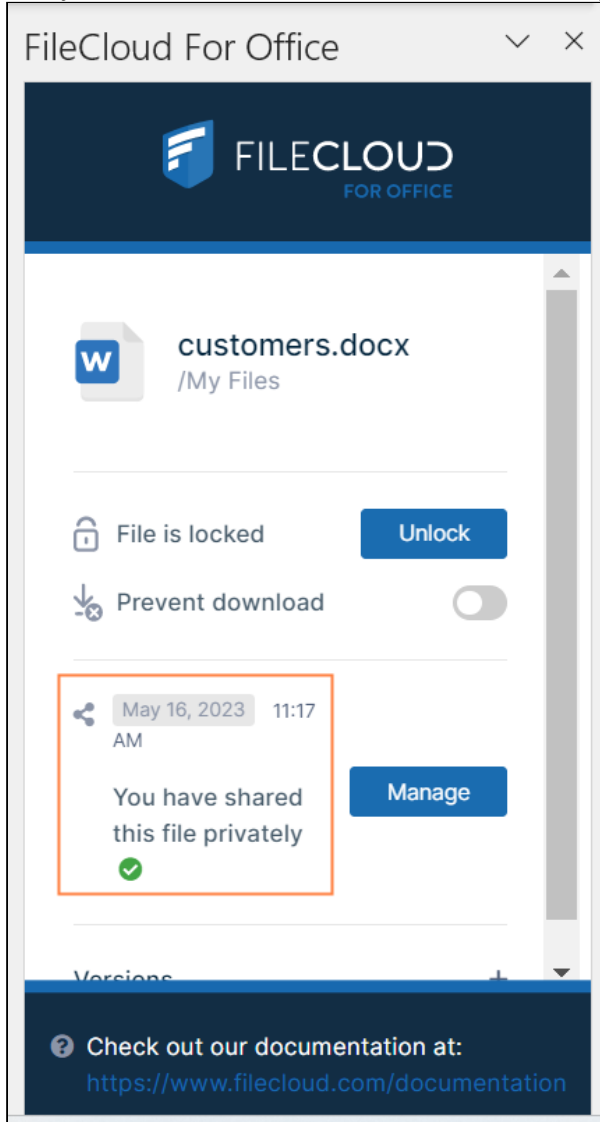
A Share Link screen that is nearly identical to the one in the user portal opens:



2. Share the file using the same settings and options that you would for a share in the user portal. See [Sharing Files and Folders](#) for help.

**Note:** The option for downloading the share QR code, which is available for shares created from the user portal, is not available for shares created in FileCloud for Office.

After you have shared the file, the FileCloud for Office panel displays details of the share:



3. Click **Manage** to change the options or permissions in the share.

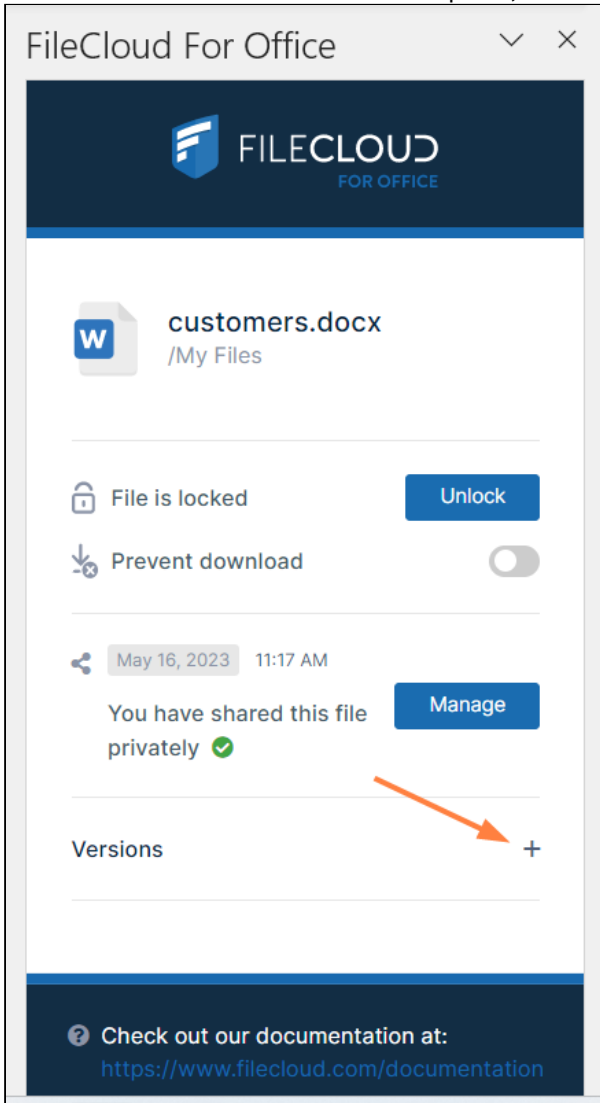
Download versions, view details and metadata

**Downloading versions, viewing details, viewing metadata**

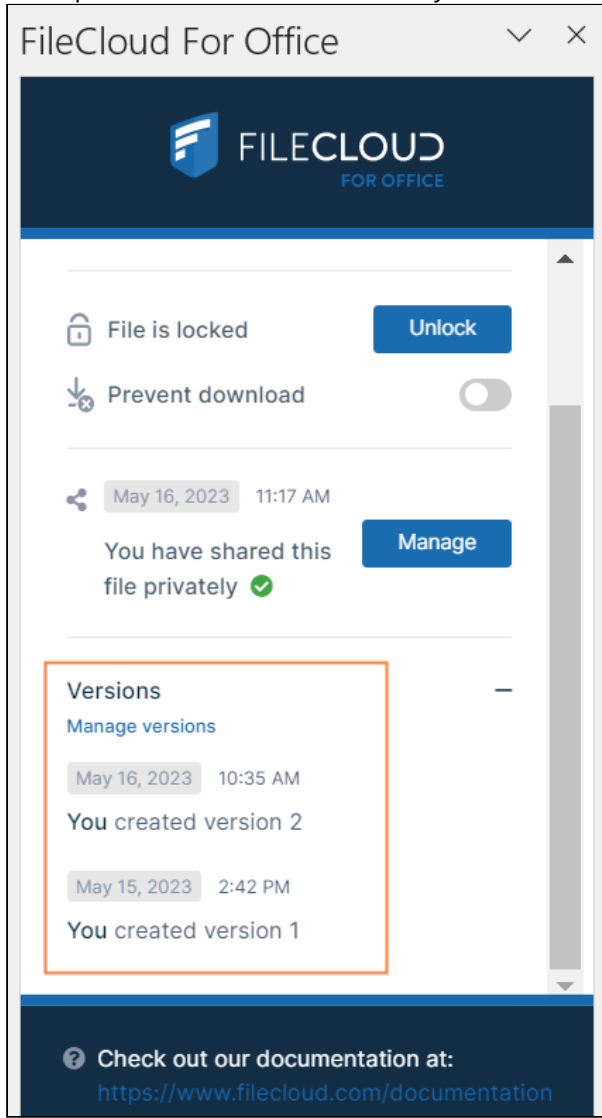
Versions

**To view a file's version information in FileCloud for Office:**

1. At the bottom of the FileCloud for Office panel, click the + across from **Versions**.

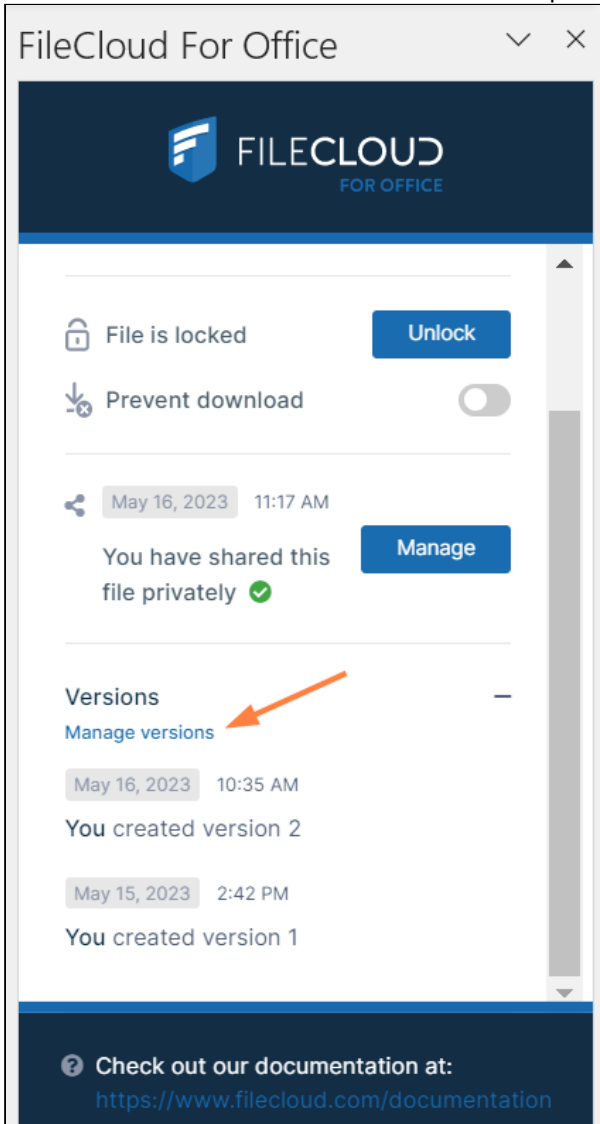


The expanded **Versions** section shows you version information about the file.

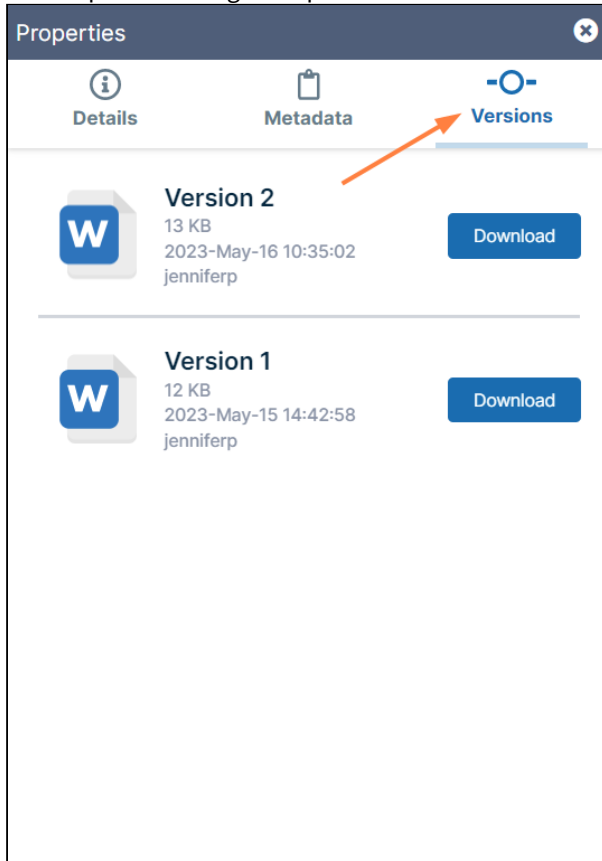


**To download file versions in FileCloud for Office:**

1. In the **Versions** section of the FileCloud for Office panel, click **Manage versions**.



The Properties dialog box opens to the **Versions** tab.

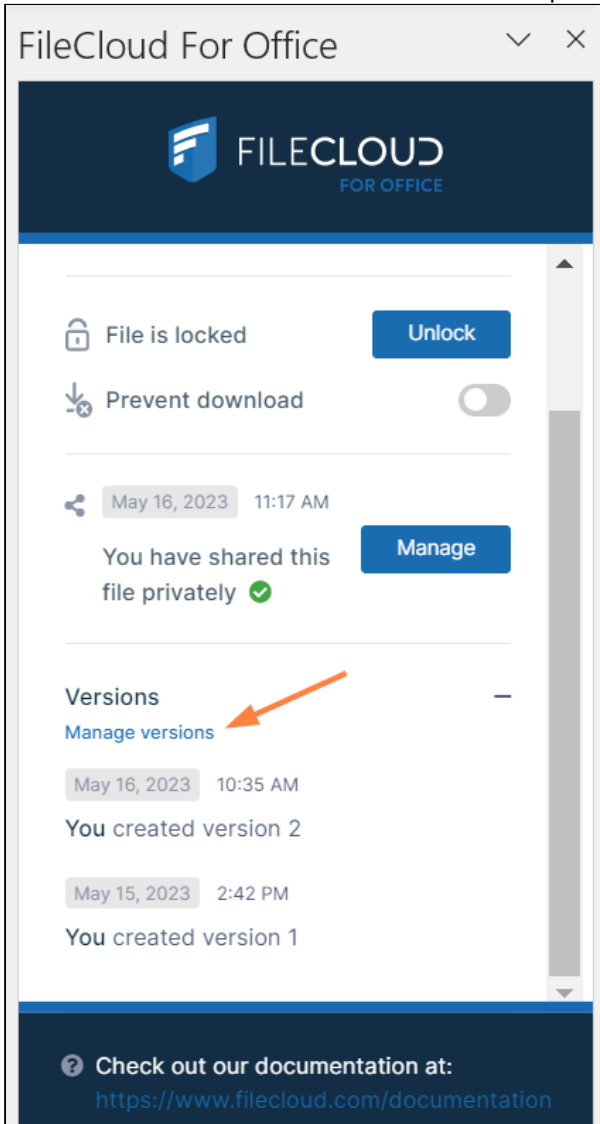


2. Click **Download** for the version that you want to download, and save it.

## Details

**To view file details:**

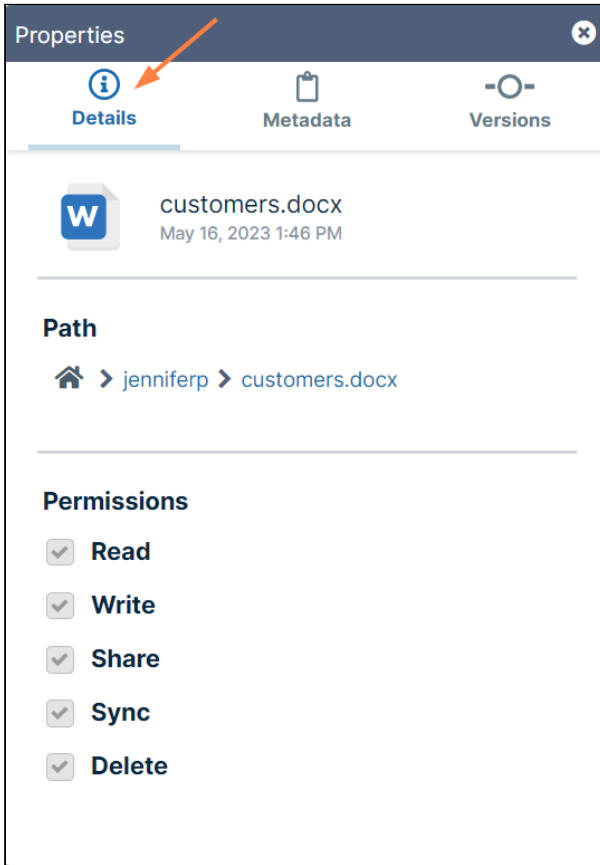
1. In the **Versions** section of the FileCloud for Office panel, click **Manage versions**.



The **Properties** dialog box opens to the **Versions** tab.



2. Click the **Details** tab.

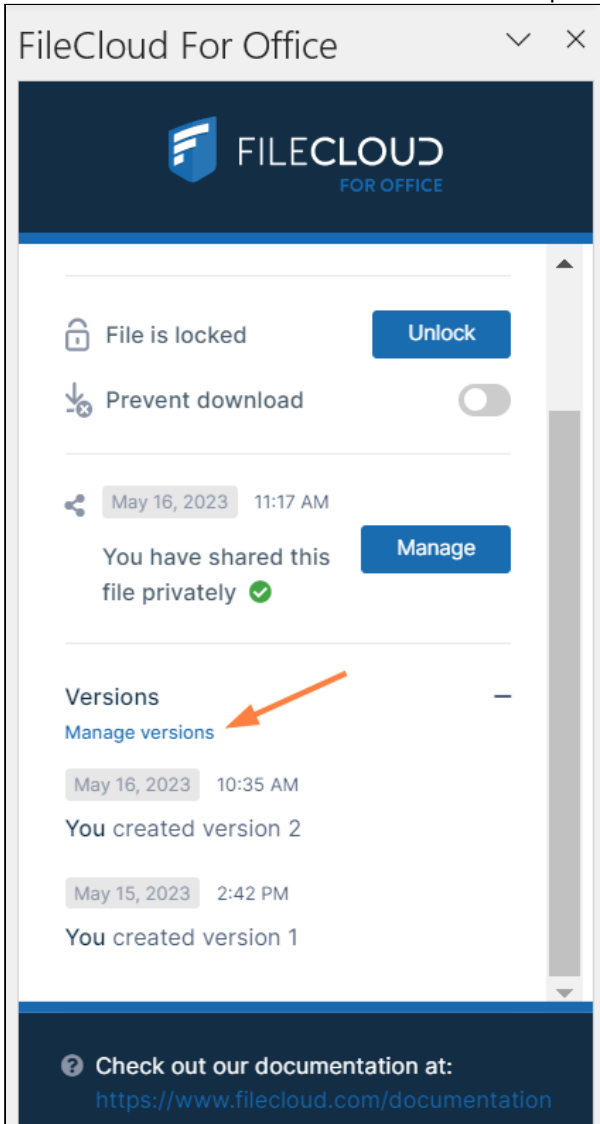


The details shown are the filename and type, the last modified date, the path of the file in FileCloud, and your permissions for the file.

## Metadata

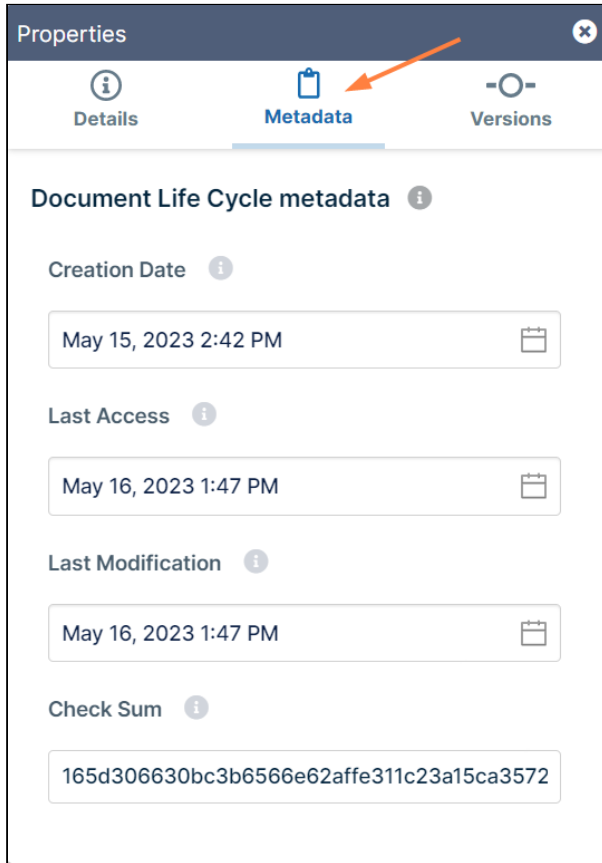
To view metadata information for the file:

1. In the **Versions** section of the FileCloud for Office panel, click **Manage versions**.



2. **The Properties** dialog box opens to the **Versions** tab.

3. Click the **Metadata** tab.



Each metadata set applied to the file is listed with the values for its fields.

FileCloud for Office log locations

### Locating FFO logs

The locations of log files for FileCloud for Office in Windows and macOS are the following:

**Windows:** %appdata%/FFOserver

**macOS:** /Users/[USERNAME]/Library/Preferences/FFOserver

View and add comments

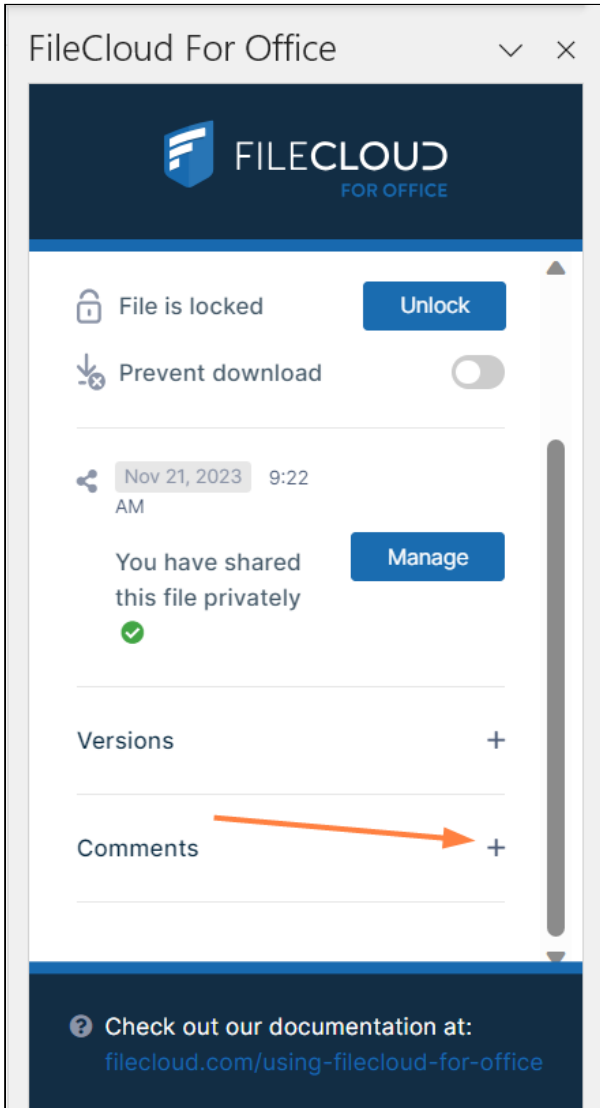
### Viewing and adding comments

Comments added to files and folders in FileCloud for Office also appear in the user portal and any of the other client apps.

### To view and add comments in FileCloud for Office:

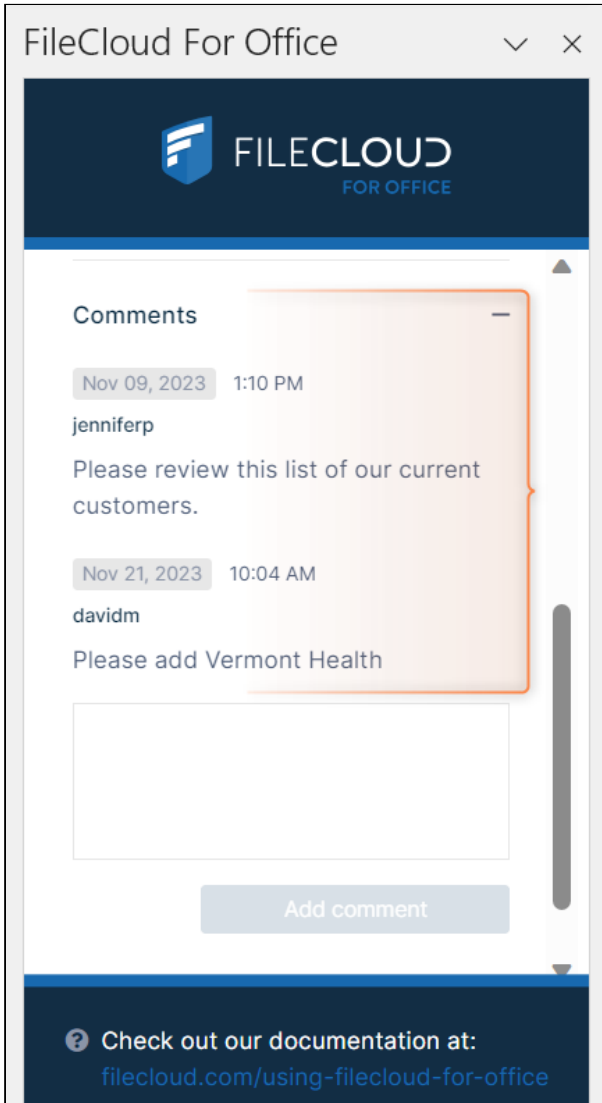
1. If **Comments** is not visible in the FileCloud for Office panel, scroll down to the bottom of the panel.

2. Click the + across from **Comments**.

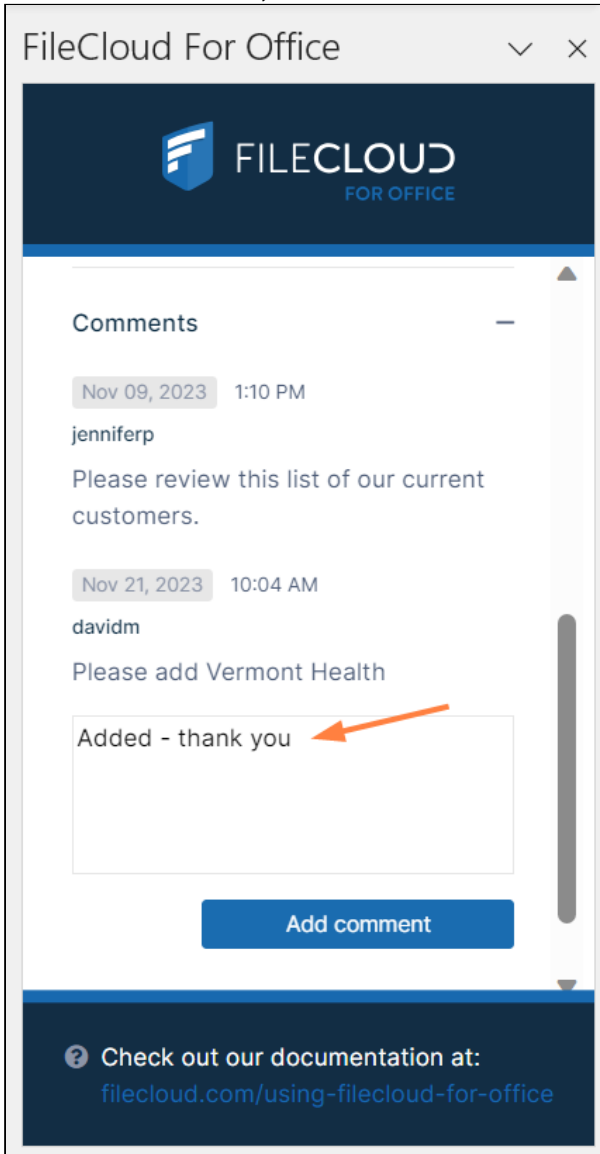


Any existing comments added to the file or folder here or anywhere else in FileCloud appear above

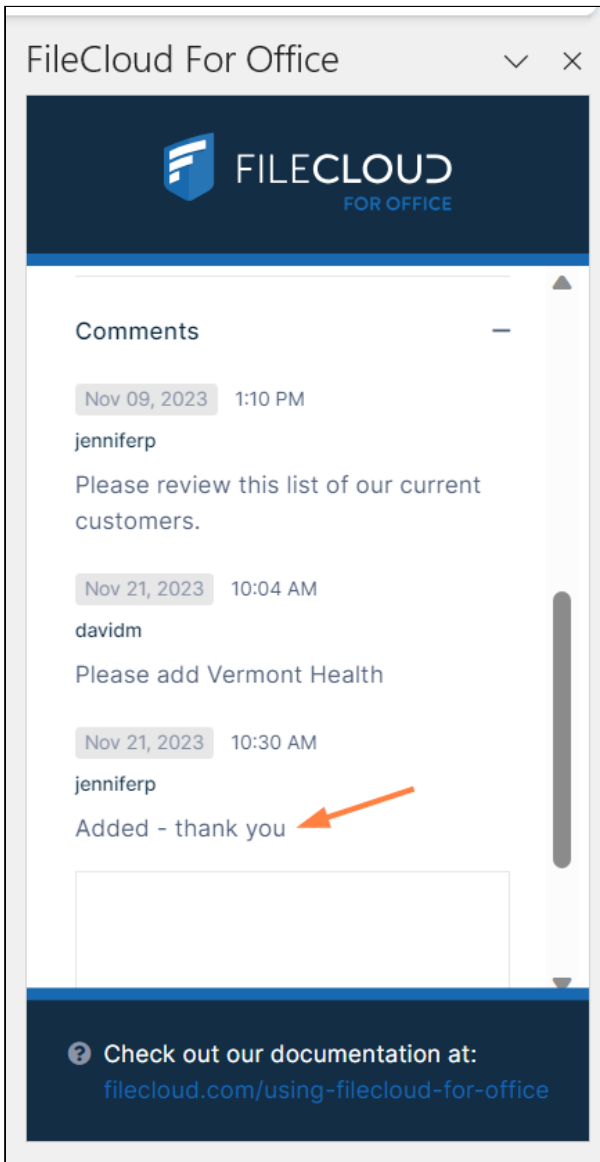
the **Comments** box.



3. To add a new comment, click inside the **Comments** box and enter the comment.



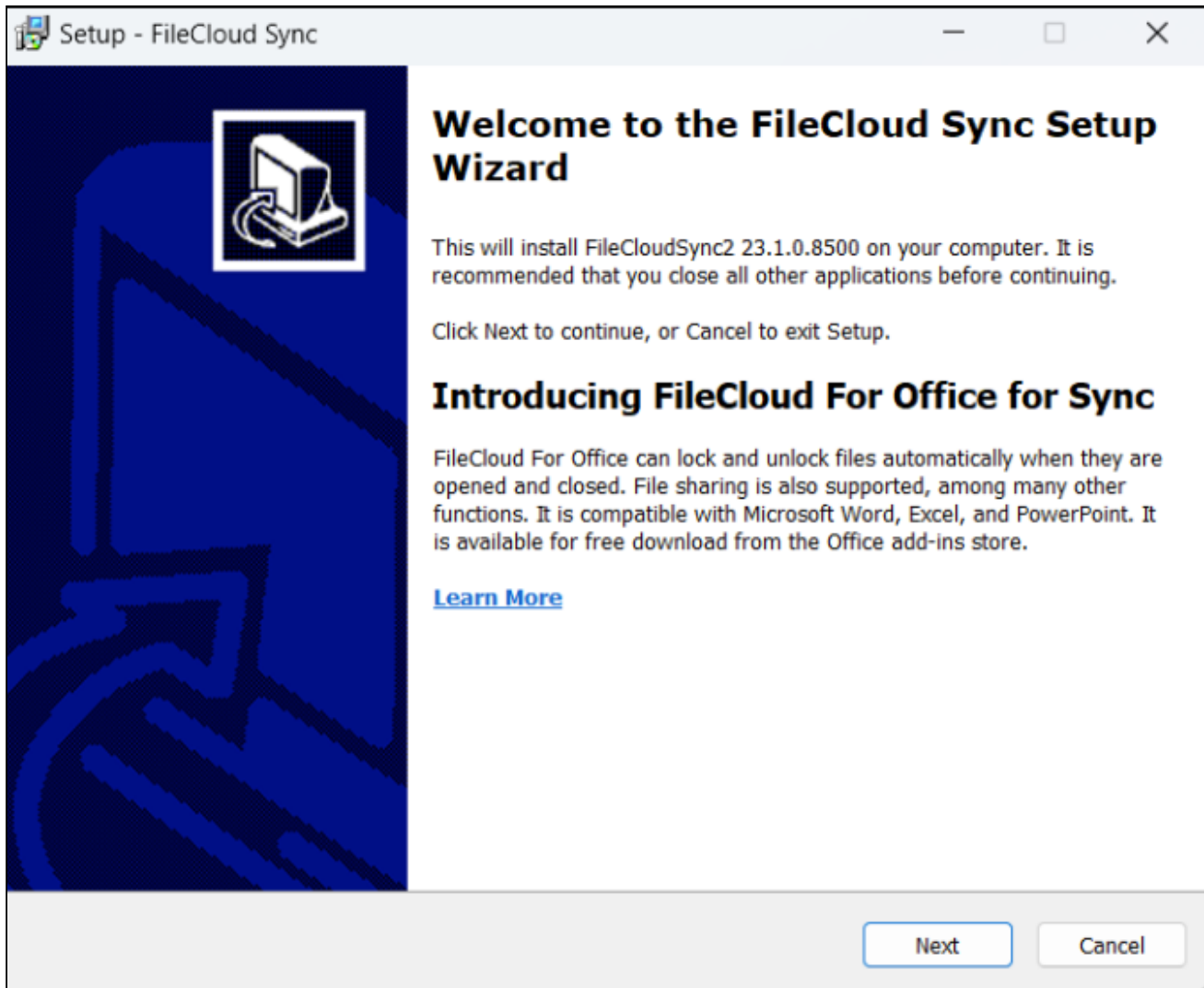
4. Click **Add comment**.  
The comment is added.



## For previous users of DocIQ

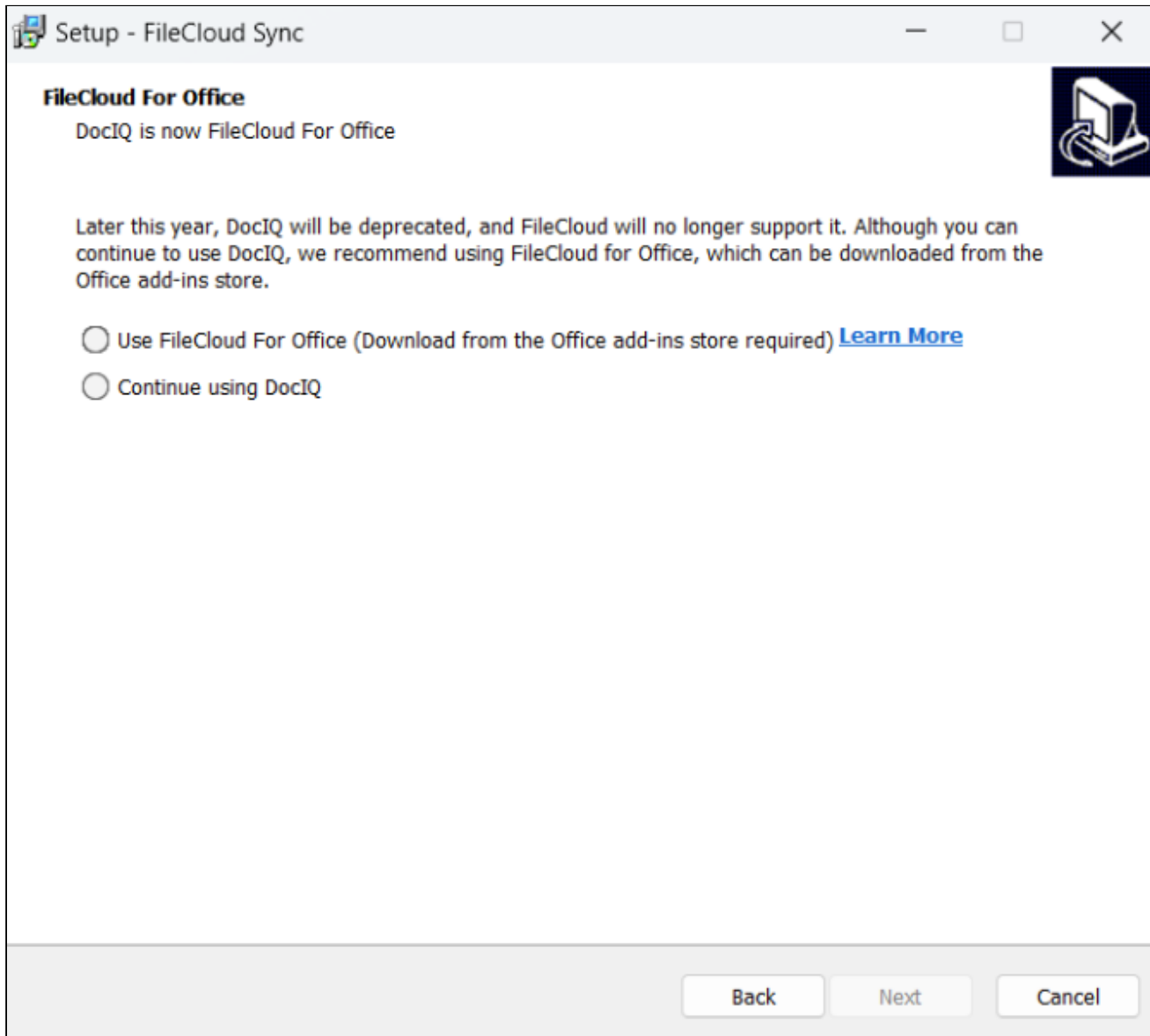
If you have never used FileCloud Sync with DocIQ before, the installer will automatically configure Sync for use with FileCloud for Office, and this section does not apply to you.

If you have previously been using FileCloud Sync with DocIQ, when you run the FileCloud Sync installer, the first screen of the wizard introduces you to FileCloud for Office:



The installer prompts you to choose whether you want to continue using DocIQ or switch to FileCloud for Office (DocIQ will be deprecated in the future).





Choose whether you want to use FileCloud for Office or DocIQ. If you choose FileCloud for Office, you are also required to install an add-in.

The installer configures your Sync installation to function with the option you have chosen.

## Sync Troubleshooting Guide

The FileCloud Sync client ensures that the content of your local files is exactly the same as the same files on the FileCloud server.

But, because of the wide variety of local computer environments and network and server configurations, there may be occasional issues when synchronization occurs.

You can troubleshoot synchronization issues by understanding how sync works and taking steps to resolve specific issues.

## Files that don't sync

Under the following conditions, FileCloud sync client might be unable to sync files to or from your FileCloud installations.

### Long Filenames or Paths

Windows Operating Systems only allows files and folder names of around 260 characters or less. So paths longer than those are not synced. If the entire file path and name exceed 260 characters, shorten the name or move the file or folder to a higher-level folder within your FileCloud.

### Names Ending with "." or ","

Files and folders ending with these characters will cause an error. The files must be renamed.

### Special Characters

FileCloud Sync doesn't sync some files with characters that are incompatible with some operating systems.

Rename them to something more suitable for use across multiple operating systems.



- The \* character
- The < character
- The > character
- The : character
- The \ character
- The / character
- The | character
- The ? character
- The \* character
- The ~ character

The following files will also **not be synchronized**:



- tonido.db
- Thumbs.db
- desktop.ini
- Anything ending with .tmp
- Anything ending with .lnk
- Files or Folders ending with space
- .tonidocache
- Folders with the name .cache
- Anything starting with Conflict\_
- sync.ico
- .ds\_store (starting with 4.71 version of Sync Client)

- Any hidden files (usually files starting with . in Linux and files with hidden attribute in windows)
- File names and file extensions which are restricted by the server admin
- Files that are in use

**i** Beginning in Version 19.1, FileCloud supports overriding file type restrictions. To allow users to sync file types such as lnk, ini and thumbs.db, as well as hidden files, use the **allowedfilelist** option on page [XML Options for Sync](#).

**i** In 11.0, Sync did not synchronize files with "." in the name. In 12.0, this restriction has been removed.

**i** Sync only detects changes when the file size changes. If the file size does not change, then the file modification is not detected by sync.

## Change Sync Folder Location

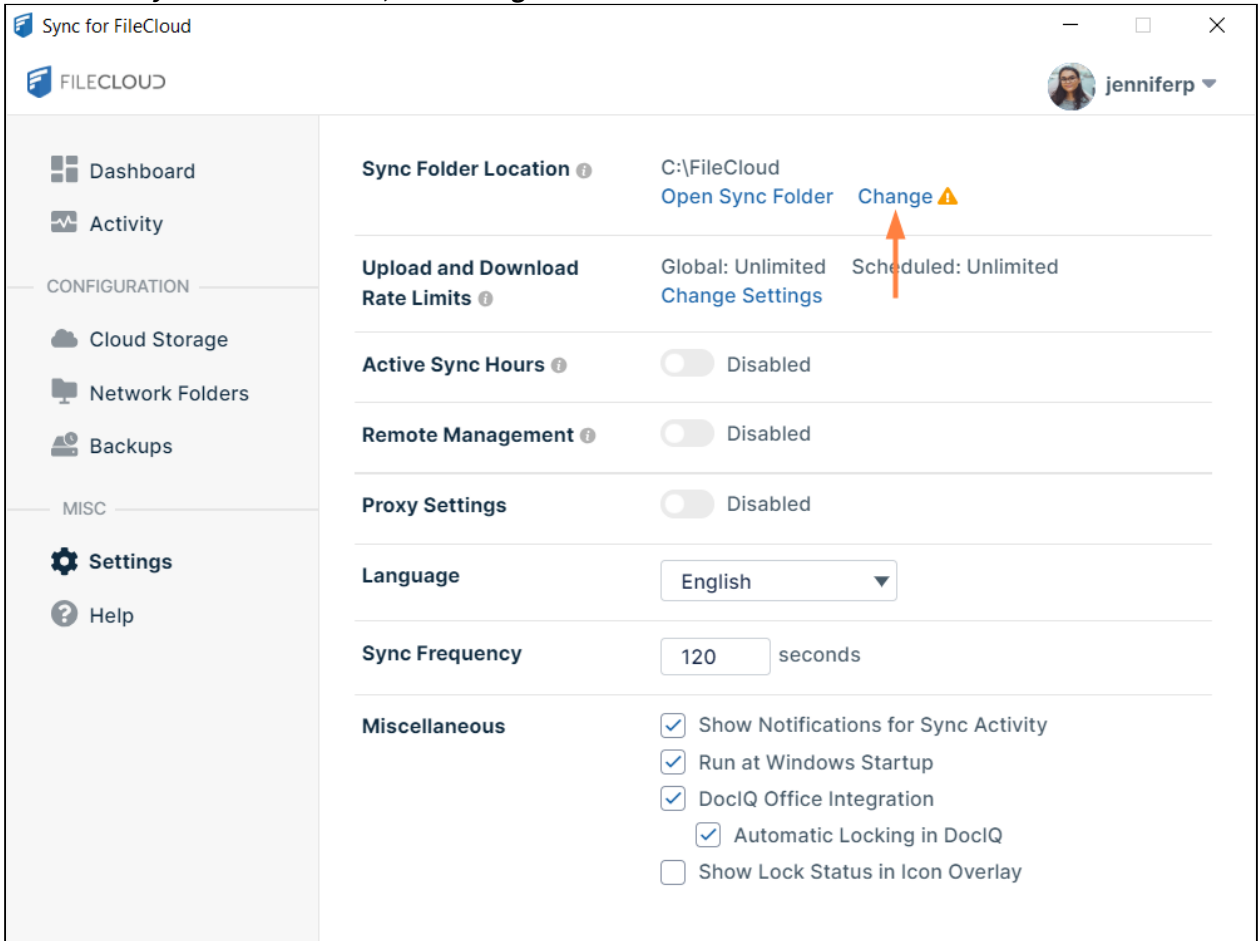
The FileCloud Sync app stores synchronized files at the following default locations:

- **Windows:** C:\users\\Documents\FileCloud
- **Mac OSX:** {HomeDir}\FileCloud
- **Linux:** {HomeDir}\FileCloud

### To change the Sync folder location:

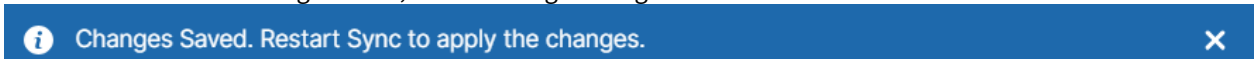
1. In your system tray, right-click the Sync icon, and choose **Open**.  
The mini-dashboard opens.
2. At the bottom of the mini-dashboard, click **Settings**  
The main dashboard opens to the **Settings** screen.

3. Across from **Sync Folder Location**, click **Change**.



Your content explorer opens.

4. Choose a new Sync folder.  
At the bottom of the Settings screen, the following message is shown:



5. Restart Sync.

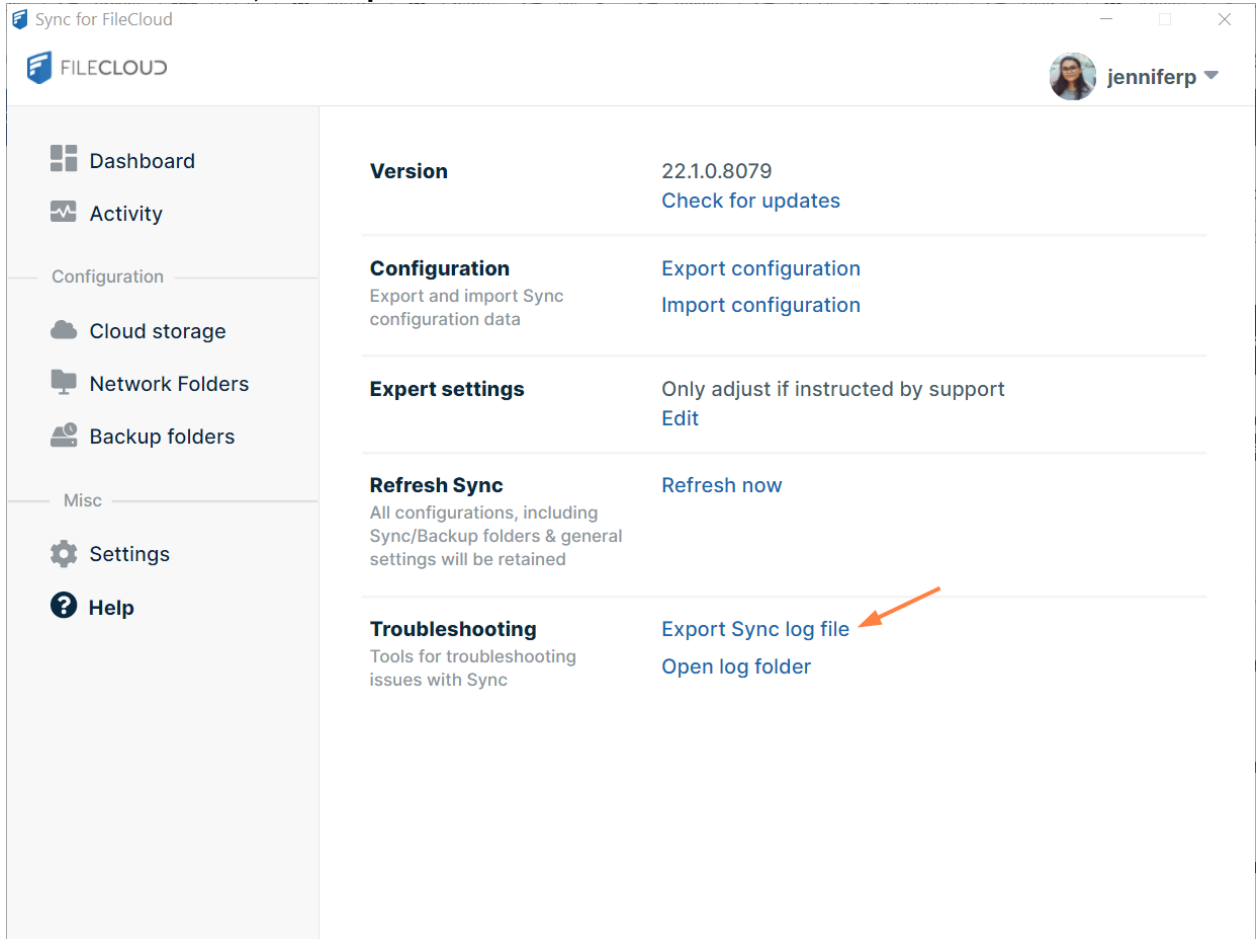
## Sync Logs

If the FileCloud Sync client stops working, you might need to send Sync data logs to Technical Support, so they can help address the issue.

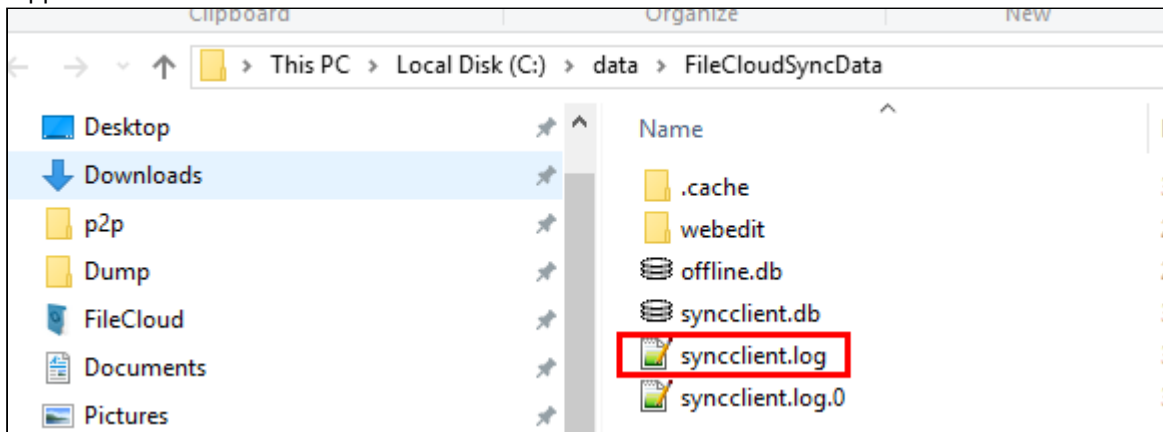
To access log files:

1. In your system tray, right-click the Sync icon and click **Open**.
2. In the mini-dashboard, click **Dashboard**.

- In the main dashboard, click **Help**.



- To get the most recent log file, click **Export Sync Log File**.
  - To get all the log files, click **Open Log Folder**.
- The folder where the syncclient.log files are located opens. Sometimes there are multiple syncclient.log files numbered syncclient.log.0, syncclient.log.1, etc. You can copy them all to a zip file and send it via email to support.



## Sync Engine Types

FileCloud Sync has two types of synchronization engines.

- A real-time synchronization engine
- A periodic synchronization engine

### Real-time Synchronization

Real-time synchronization synchronizes files as they change locally and with minimum delay from the server. You can initiate a sync immediately using the **Sync Now** option. Real-time synchronization works for all files inside Managed Storage (My Files and Shared with Me) .

### Periodic Synchronization

Periodic synchronization synchronizes files on a specified time interval starting at every 30 minutes, 1 hour, etc, depending on your setting in **Sync Frequency** in the [Settings screen](#) of the main dashboard. Backing up files from your local computer to your remote server is also a form of periodic synchronization.

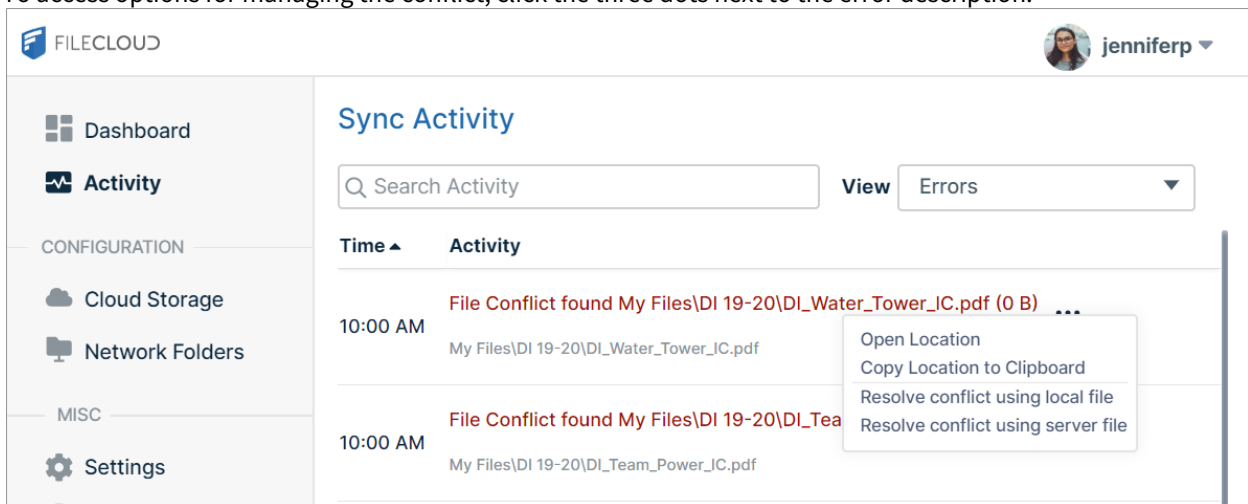
	<b>Real-time Synchronization</b>	<b>Periodic Synchronization</b>
Local Change Upload Frequency	Uploads local changes as soon as a local file changes.	Uploads changes after specific intervals.
Remote Change Download Frequency	Default is every 2 minutes; can be changed by changing the <b>Sync Frequency</b> in the <a href="#">Settings screen</a> of the main dashboard.	Downloads changes after specific intervals.
Type of Remote Storage	Managed Storage (My Files and Shared with Me)	Local to remote backup,
Initial Setup	Folders under My Files and Shared Folders with Sync permissions are automatically downloaded.	User manually chooses folders to download and sync.
Limits	<ul style="list-style-type: none"> <li>• Managed Files (no limit, tested up to 300,000 files).</li> </ul>	Efficient up to 500-1000 folders. The more folders, the longer it takes to synchronize.

## View Sync Error Details

### View errors from the Sync Activity screen

To view details about an error from the **Sync Activity** screen:

1. In the system tray, right-click the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Dashboard**.
3. In the main dashboard, click **Activity**.  
The **Sync Activity** screen opens.
4. In the **View** drop-down list, choose **Errors**.  
The screen lists activities that resulted in errors along with the location of the error.
5. To access options for managing the conflict, click the three dots next to the error description.



6. To resolve file conflicts, see [Managing Sync Conflicts](#).

## Sync Errors: Causes and Resolutions

Because of the wide variety of local computer environments and the many network and server configurations, there can sometimes be issues when synchronization occurs.

💡 Click an issue in the following list to read more about it.

### Shared with Me Folder is not syncing

#### Cause

The shared folder must have permissions set in order for you to sync with it.

#### Resolution

Make sure the shared folder has **Sync** permissions enabled.

➔ [Private Share Permissions for Folders](#)

### **Team Folders are not synchronizing**

#### **Cause**

FileCloud treats Team Folders in the same way as Managed Storage.

- If one file fails to synchronize because it is locked, the sync operation is cancelled, and no files in Team Folders are synced..

#### **Resolution**

Verify that none of the files on the server that you are trying to sync are locked.

### **Initial sync is taking too long**

#### **Cause**

When starting up for the first time on a new computer, Sync:

1. Downloads all the files from the FileCloud server; and
2. Stores the files in the temporary Sync cache folder; and
3. Copies the files into the Sync folder.

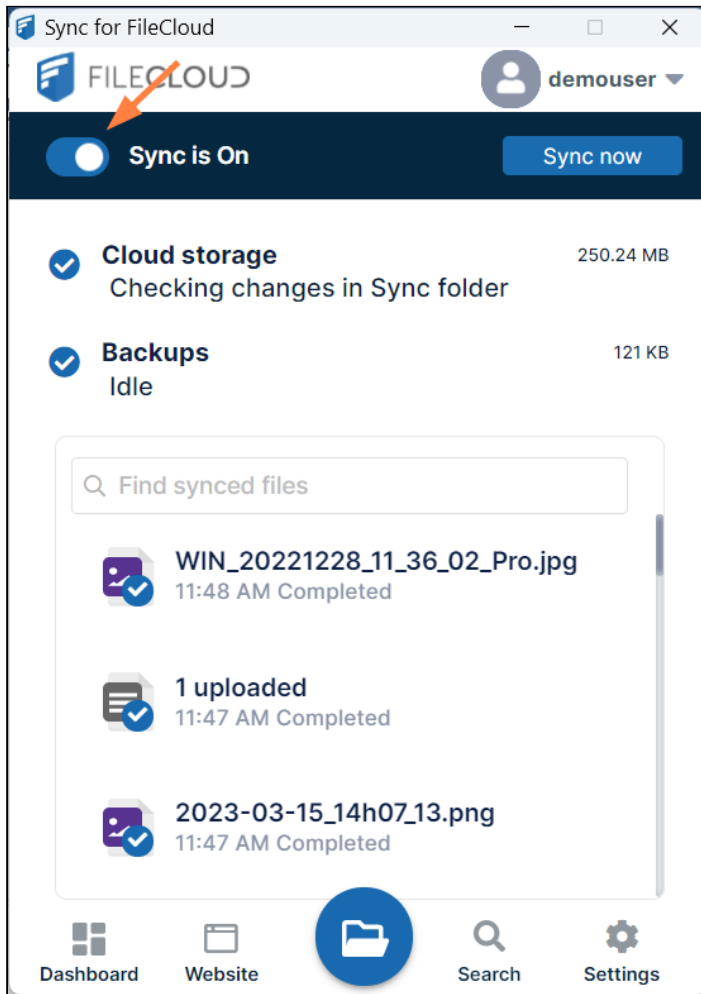
If there are a large number of files and data on the FileCloud server, initially downloading the files will take a long time.

★ Subsequent file synchronization will be faster.

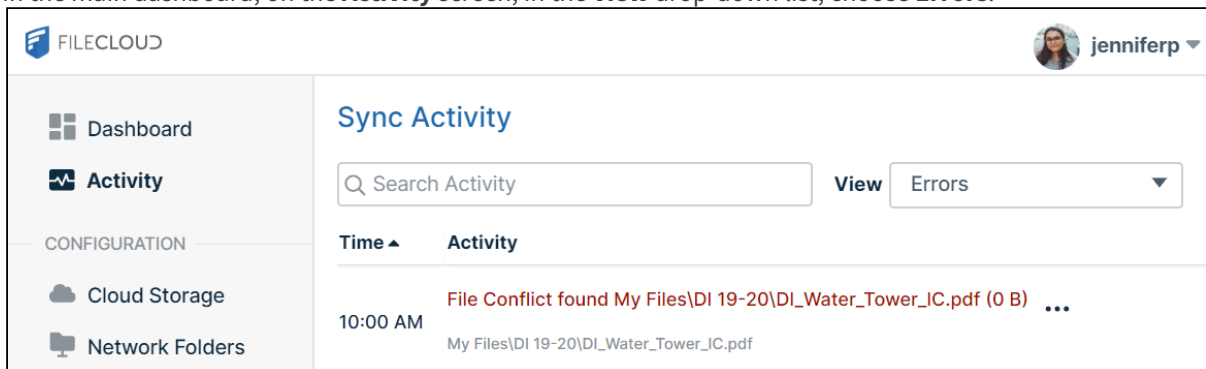
#### **Resolution**

- At the top of the mini-dashboard or the main dashboard (in the Dashboard screen) confirm that you see the message **Sync is ON**, which indicates that Sync is enabled.





- In the main dashboard, on the **Activity** screen, in the **View** drop-down list, choose **Errors**.



If there are errors, please find the description of the error type on this page.

## Download Sync Error

### Cause

After downloading files, Sync finds an inconsistency with the downloaded file from the server. This could be due to several factors:

- An interruption in the download
- A temporary interruption in network availability
- A problem with the file on the server

### Resolution

- Download the same file via the web browser and see if it downloads correctly.
  - Note the size of the file. Does the size match the size displayed in the web browser listing?
  - If the size matches then there could be a transient network condition. Try syncing the files again.
  - If the file size doesn't match then there is something wrong with storage. Please contact FileCloud support.

### Upload Sync Error

#### Cause

Sync is unable to upload a file back to the server.

#### Resolution

- Try uploading the same file to the same location using the web browser.
  - If the upload fails, then note the error.
  - The problem could be that the location you are trying to upload to has no permissions or that there is an issue with a server configuration or the environment.
  - Check with your administrator to see if the server has sufficient disk space in the drive FileCloud is installed on.
- Check the file name for any special characters that could make the upload fail.
  - If this is the issue, try renaming the file and see if the upload works.

### File Overlays not appearing on Windows

#### Cause

The computer requires a reboot after installation.

#### Resolution

- Check if Windows Explorer integration was installed and the PC was rebooted.

### Some files are not syncing

#### Cause

FileCloud restricts the use of certain special characters in file names. If a file contains one of these characters it is not synchronized.

..  
\  
/

:  
\*  
?  
"  
<  
>  
|

FileCloud allows an administrator to restrict certain types of files for security reasons.

### Resolution

- Check the [full list of special characters that don't get synchronized](#).
- Check if the file has an extension that is disallowed for Sync by server.
  - For example, by default, PHP, PHP5 file extensions don't get synced.
  - [You can change the allowed file types on the server and restart the sync](#)

### Sync is looping continuously on some folders

#### Cause

If you try to share a folder that contains other folders already being shared, Sync might continuously try to sync those folders.

For example:

- You share */SHARED/john/toplevel*
- And a sub-folder inside the *toplevel* folder is also being shared */SHARED/john/toplevel/subfolder*

### Resolution

Check if there is a share set up for a top folder and one of its sub-folders, both of which have sync permissions.

- Only sync the top-level folder, which will also cause the sub-folder to be synchronized.

### File changes are not uploading

#### Cause

Sync uses file sizes to detect file changes and then upload them. Some file formats like XLS don't change the file size when content is changed so these files might not be uploaded.

### Resolution

- Try changing to XLSX format if possible
- Use the optional parameters to detect changes using file checksums or modified timestamps (or both). See: **Document Life Cycle Metadata** in [Working With Built-In Metadata](#)

### Number of synced files and sizes don't match Mac OSX Finder

**Cause**

Finder includes files and folders in the total list of items so that number will be different from the number of files reported in Sync.

Also .DS\_Store files are not synced by sync app, so those files will not be synced.

```
A = 'find . -type f | wc -l'
```

```
B = 'find . -type f -name ".DS_Store" | wc -l'
```

Number of files in sync will match A - B

Finally, the size reported by Finder uses a different way of calculating GB size vs FileCloud.

Windows uses the standard GB while Macs use a GB = 1,000,000,000 bytes.

**No error is shown when a user copies/pastes a file/folder into the parent folder**

Filecloud Sync does not show an error every time a user copies and then pastes a file or folder into a read-only parent folder. In FileCloud Drive, the same action displays an error that the parent folder is read-only. The user can be confused when no error is shown in FileCloud Sync but is shown in Drive.

**Cause:** In FileCloud Sync, these errors are shown every 3 hours only.

- The user will see the message: **Skipping top level files or folders that are not inside a sync-able folder**
- The message is displayed in the **Activity** log and also as a pop-up notification
- Only the name of the very first folder or file that cannot be synchronized is displayed in the **Activity** log and pop-up (Instead of every file and folder name)

# FileCloud Drive

**i** FileCloud Drive versions below 22.1 do not support MacOS Ventura. If you are using MacOS Ventura, please install or upgrade to FileCloud Drive 22.1.

FileCloud Drive now supports Big Sur Version 11.3 and higher running on Apple Silicon. However, a change to your security settings is required. See [FileCloud Drive: Configuration for Big Sur Running on Apple Silicon](#).

You can use FileCloud Drive to store, access, and share files to collaborate with the people you work with or share data with.

- FileCloud Drive is a client application that allows you to access FileCloud and the files you store there.
- You can access files in Drive in the same way you access them on a Windows PC in Windows Explorer.
- The same features that are available on the User Portal are available in Drive.
- Drive allows you to easily open the User Portal.
- In FileCloud version 18.2 and later, you can access Drive files from Microsoft applications.

This section describes how to use Drive on a Windows computer; however, you can also use Drive on a Mac with [FileCloud Drive for Mac](#).

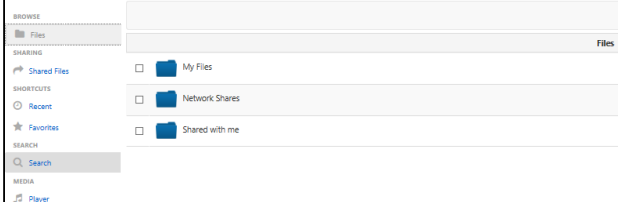
Full sharing functionality is available in FileCloud Drive on Windows in FileCloud version 17.3 and later. Updated right-click menu options for sharing are available in FileCloud version 18.2 and later. The ability to create a direct link to a folder is available in FileCloud version 19.1 and later. The FileCloud Drive interface was redesigned in FileCloud Version 21.1.

## In this section:

### What is FileCloud Drive?



FileCloud Drive allows you to access files in FileCloud the same way you access them in Windows.

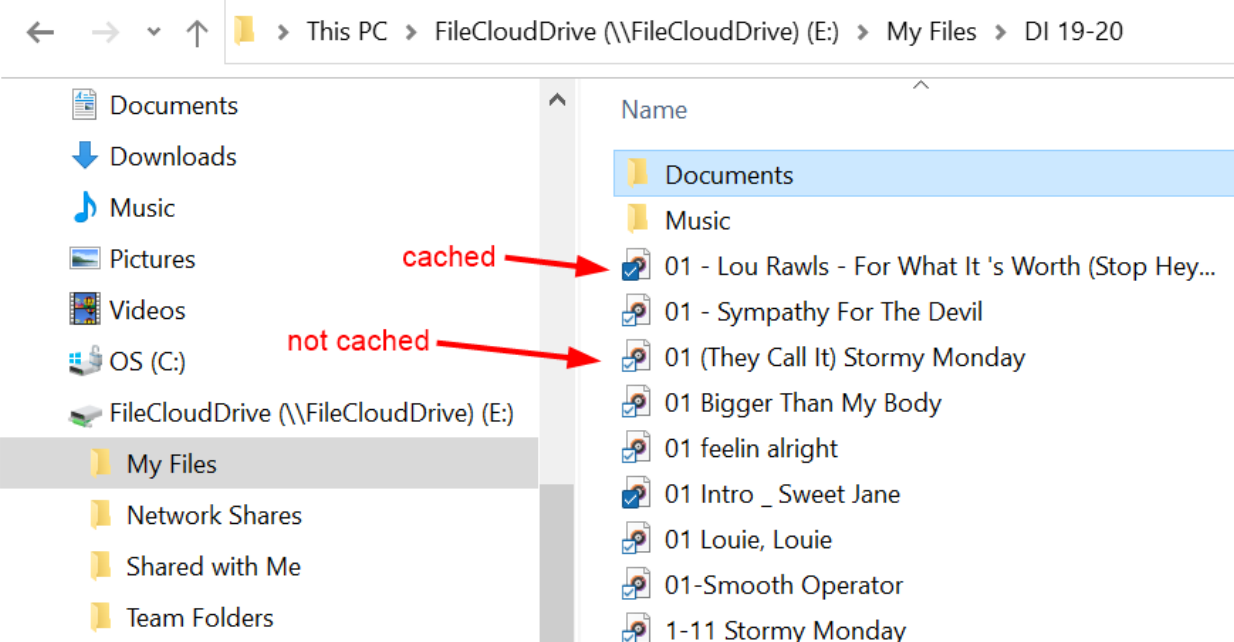
If you are used to working with Windows File Explorer, you may think that changing to a Web-based UI will reduce your efficiency. Traditionally, with a Web-based UI, you must open the website to download files, then modify them in their application, and then open the website again to upload them back to the Web UI. This effort is eliminated when you work through FileCloud Drive. You can actually edit files the same way you edit them in Windows because the files (and folders) appear virtually in File Explorer and are directly accessible.

This is how our files are accessible in the FileCloud Server application.	Similarly, this is how our files are accessible in a Windows PC using FileCloud Drive.																
	<table border="1"> <thead> <tr> <th>Name</th> <th>Date modified</th> <th>Type</th> <th>Size</th> </tr> </thead> <tbody> <tr> <td>My Files</td> <td></td> <td>File folder</td> <td></td> </tr> <tr> <td>Network Shares</td> <td></td> <td>File folder</td> <td></td> </tr> <tr> <td>Shared with me</td> <td></td> <td>File folder</td> <td></td> </tr> </tbody> </table>	Name	Date modified	Type	Size	My Files		File folder		Network Shares		File folder		Shared with me		File folder	
Name	Date modified	Type	Size														
My Files		File folder															
Network Shares		File folder															
Shared with me		File folder															

When you open one of your Drive folders, the same contents that appear in the FileCloud user portal are listed. Files are cached when they are initially accessed (either by the system during download or by you when you initially open them).

To help you determine how quickly you can access files, checkmark overlays appear on files:

- Files with icons overlaid with a white check on a blue background  are cached.
- Files with icons overlaid with a blue check on a white background  are not cached.

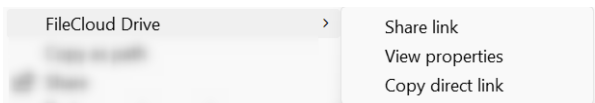
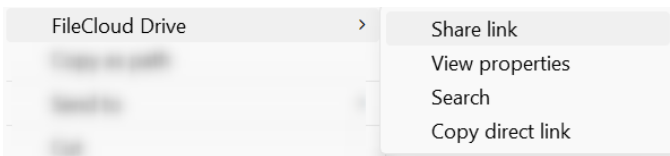


The screenshot shows a Windows File Explorer window with the address bar set to "This PC > FileCloudDrive (\\FileCloudDrive) (E:) > My Files > DI 19-20". The left sidebar shows "My Files" selected. The main pane displays a list of folders and files. Red arrows point to specific files: "01 - Lou Rawls - For What It 's Worth (Stop Hey..." is labeled "cached" and "01 (They Call It) Stormy Monday" is labeled "not cached".

The following FileCloud options are available for Drive from the Explorer window when you right-click on a file or folder in My Files or Network Folders and choose **Show More Options > FileCloud Drive**:

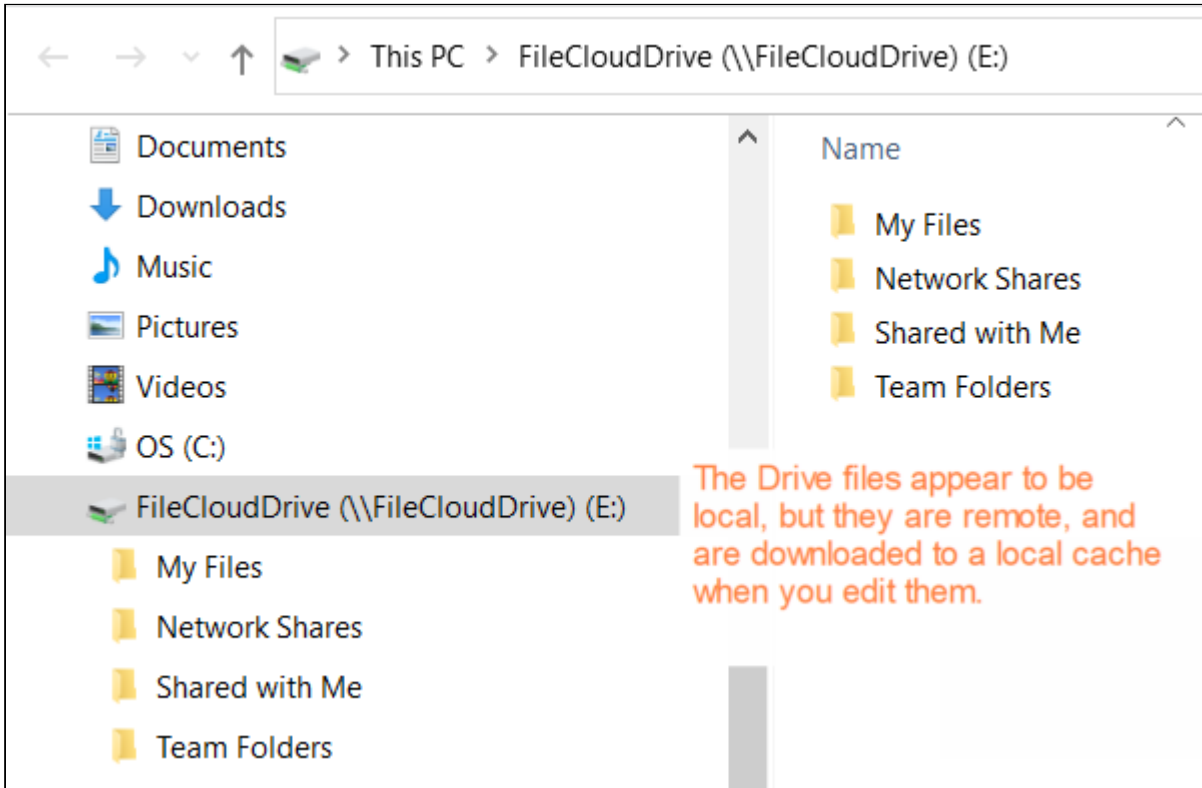
A File	A Folder
	

When you right-click on a file or folder in Team Folders or Shared with Me and choose **Show More Options**, you also see an option to share a link with someone who already has access to the Team Folder or Shared with Me. To share a link with someone who already has access to a folder, see [Sending a link from a Team Folder or Shared With Me](#)

A File in a Team Folder or Shared with Me	A Folder in a Team Folder or Shared with Me
	

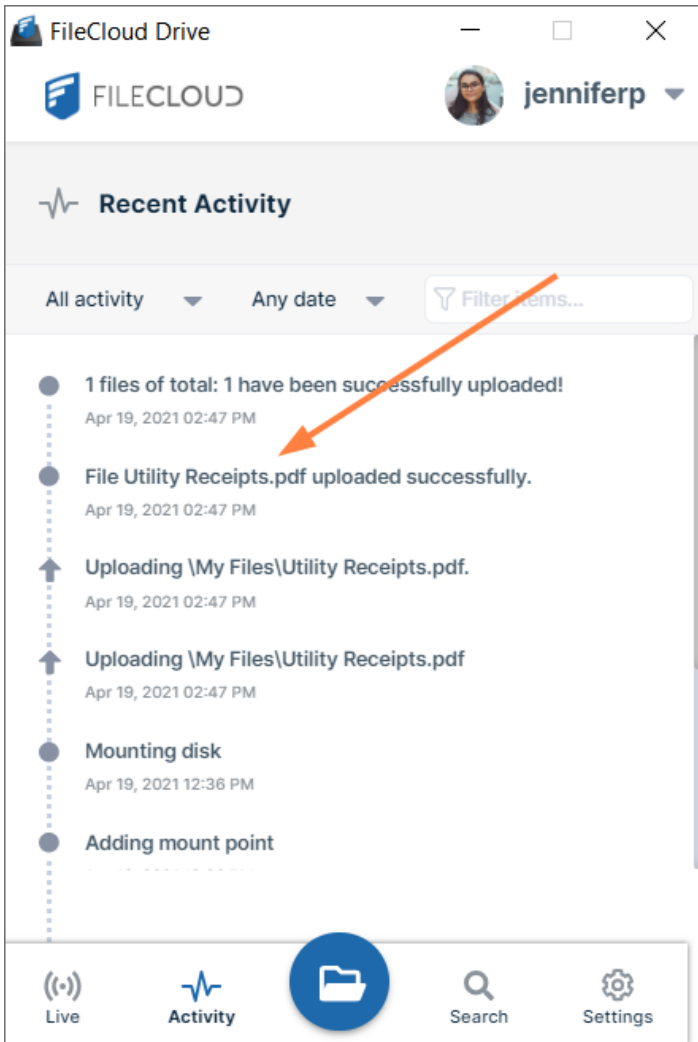
## Understanding FileCloud Drive

FileCloud Drive provides a virtual view of your FileCloud files and makes it appear as if the files are actually local, but in reality they are not. When you open them in your explorer or finder, they are downloaded to a local cache. When you save the files, they are saved to the cache and then uploaded to FileCloud's remote server.

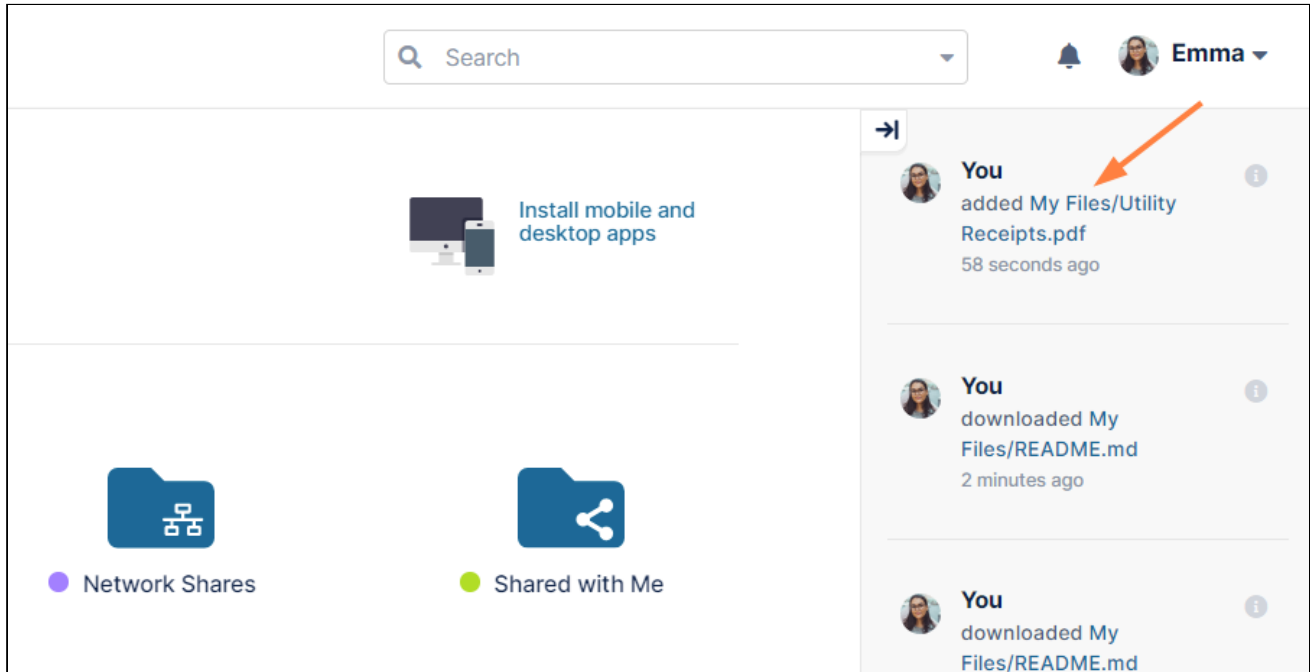


When you save your files, confirm that they have been uploaded to FileCloud by looking for the notification in the Drive app or the FileCloud user portal notifications.














File upload notification in Drive app.




File upload notification in FileCloud user portal.

Network Dependency	Description	Best Practice
<p>💡 Network must be available.</p>	<p>FileCloud Drive depends on your network to download files from the remote FileCloud server and to upload them back to it.</p>	<p>✅ Use a reliable network connection.</p>

Network Dependency	Description	Best Practice
<p> File size determines download time.</p>	<p>When you have a large file, for example 1 GB, and you try to open it in an application via FileCloud Drive, it is not instantaneously available like smaller files. The time it takes to be downloaded from the remote connection and then opened is visible to you, and depending upon your network connectivity this could take a while.</p>	<ul style="list-style-type: none"> <li> Use FileCloud Drive to work with small to medium sized files</li> <li> Use FileCloud Drive to edit documents</li> <li> Use FileCloud Drive to upload a small number of files or download small documents.</li> <li> FileCloud Drive is more convenient than using the web portal to edit files because it avoids manually downloading the file first, editing it, and then re-uploading it to the server.</li> <li> FileCloud Drive's explorer window automatically opens the document in the application, allows you to edit, saves it, and then uploads the file back to the server.</li> <li> Use FileCloud Sync If you are working with files that are 1 GB or larger, because they are stored directly in File Explorer.</li> </ul>
<p> Network connectivity determines how long it takes to complete an action.</p>	<p>When you choose an action like copy or delete from the system tray menu, the cursor icon animates until all operations are committed to the FileCloud Server. When the action is complete, the cursor stops animating. The time it takes the action to complete depends on the speed of your network connection. That is why it is better to use Drive with small files and small amounts of files at once.</p>	<ul style="list-style-type: none"> <li> Wait for the cursor to stop moving before choosing another action.</li> </ul>

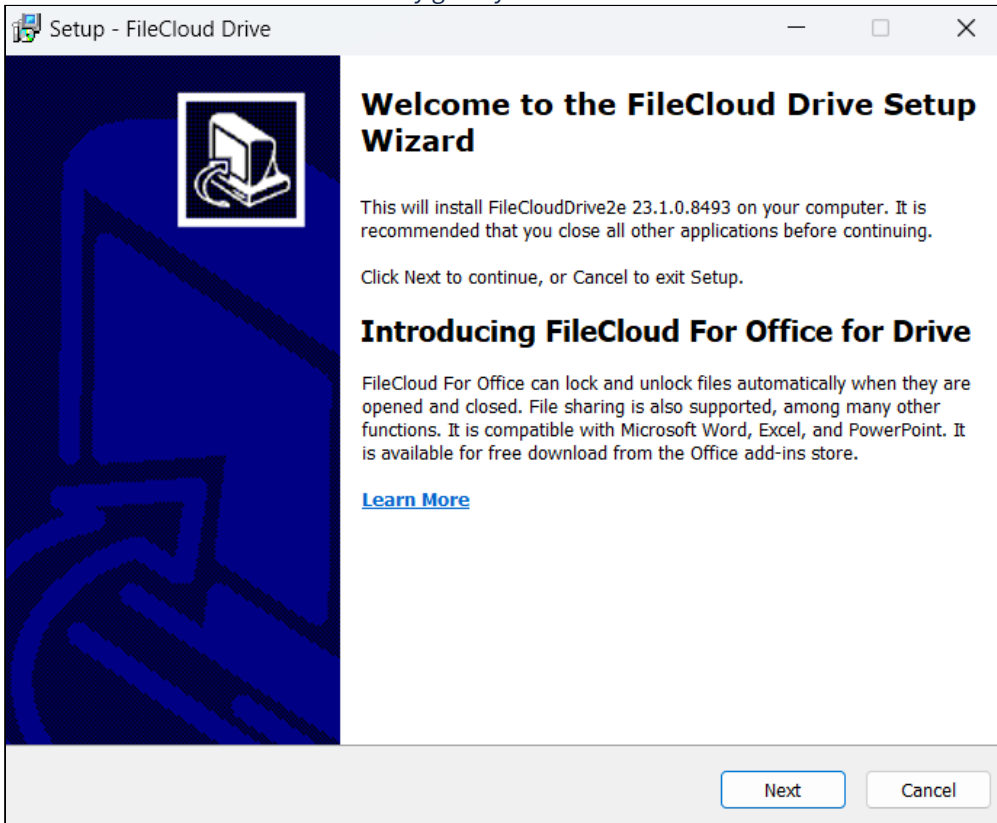
## Installing FileCloud Drive

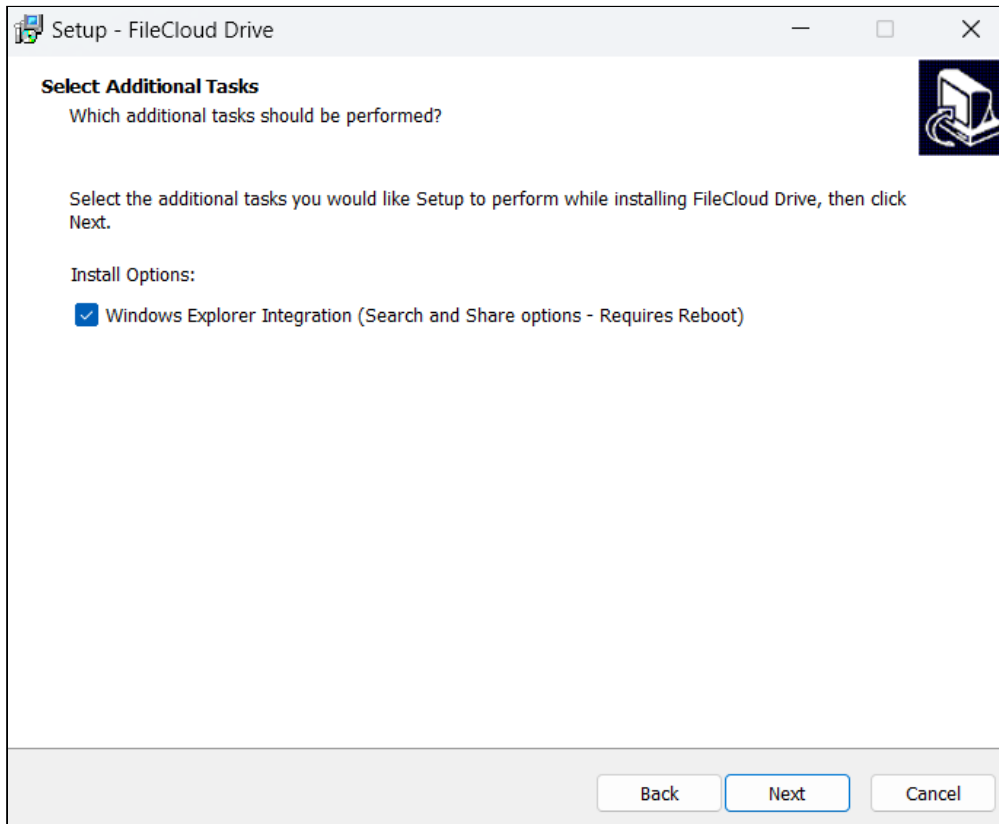
 **Current FileCloud Drive users (DocIQ users):** Later this year, DocIQ will be deprecated, and FileCloud will no longer support it. Although you can continue to use DocIQ, we recommend using FileCloud for Office, which can be downloaded from the Office add-ins store. Now, when you upgrade FileCloud Drive, you are given the choice of using FileCloud for Office or continuing to use DocIQ. If you choose to use FileCloud for Office, please see the [Using FileCloud for Office with Drive](#) documentation.

Beginning in FileCloud Version 21.3, Drive installs into the folder **Program Files** instead of the folder **Program Files(x86)**.

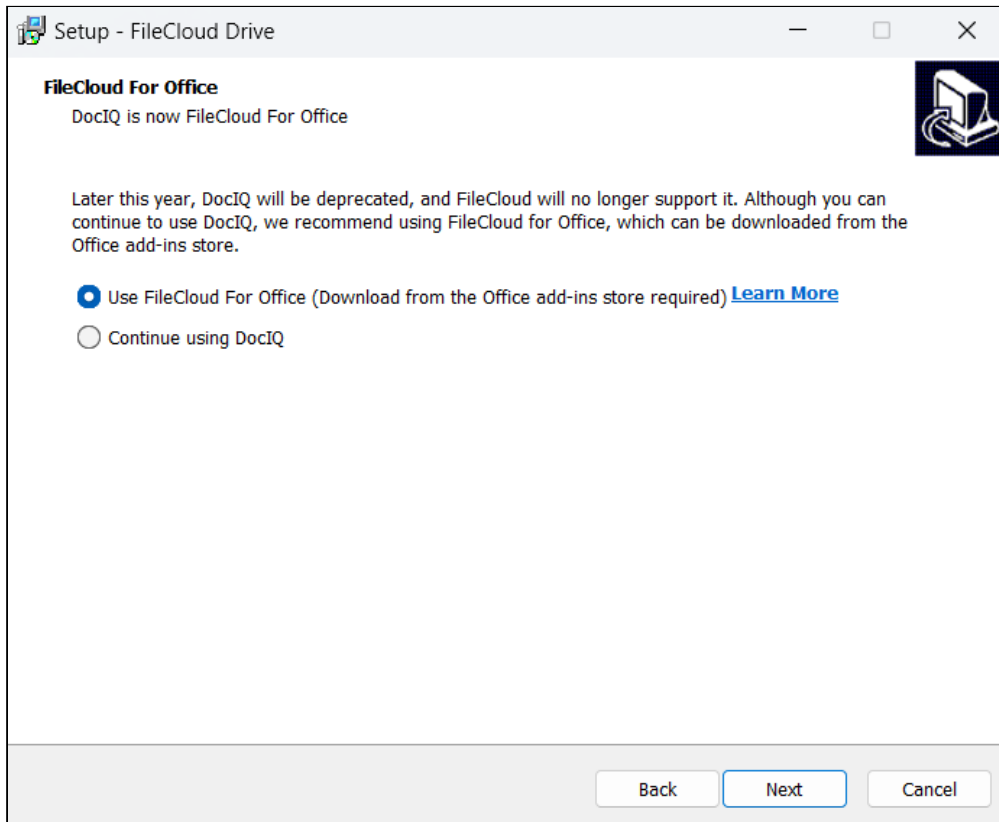
To install FileCloud Drive:

1. Download FileCloud Drive from the following URL:  
<http://www.filecloud.com/additional-downloads/#drive>
2. To run the installation wizard, click the FileCloudDrive2eSetup.exe execution file you just downloaded. The first screen of the wizard currently gives you information about the new FileCloud for Office feature.

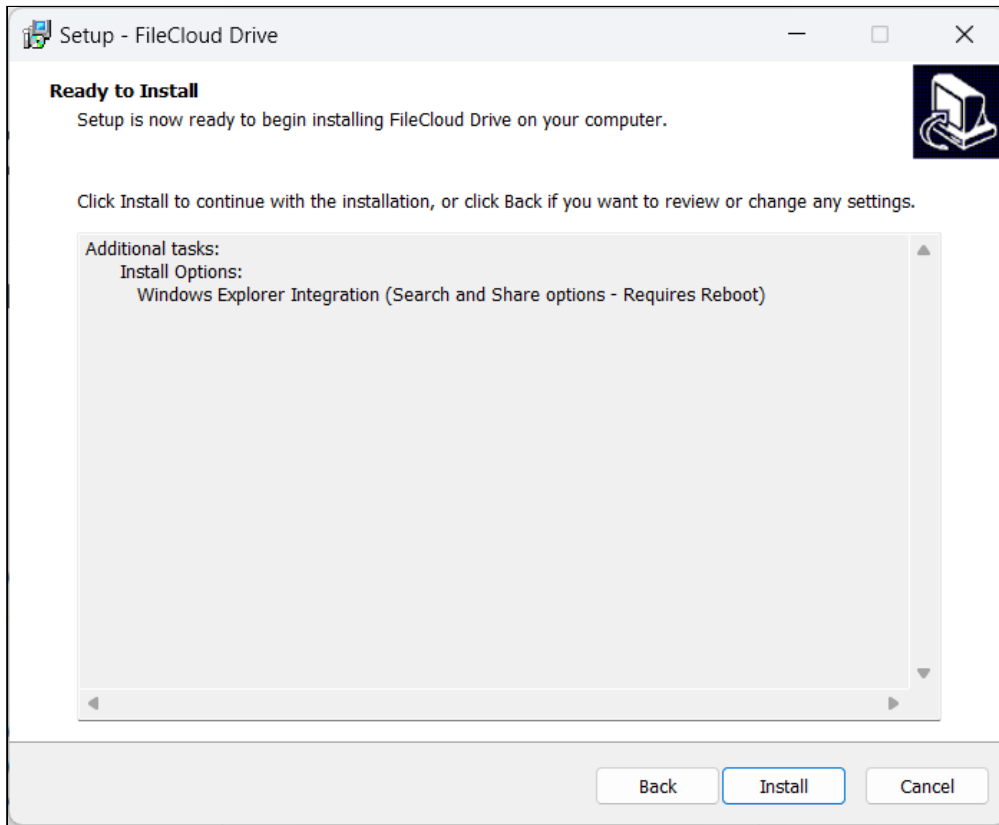


3. Click **Next**.4. Leave the checkbox checked, and click **Next**.

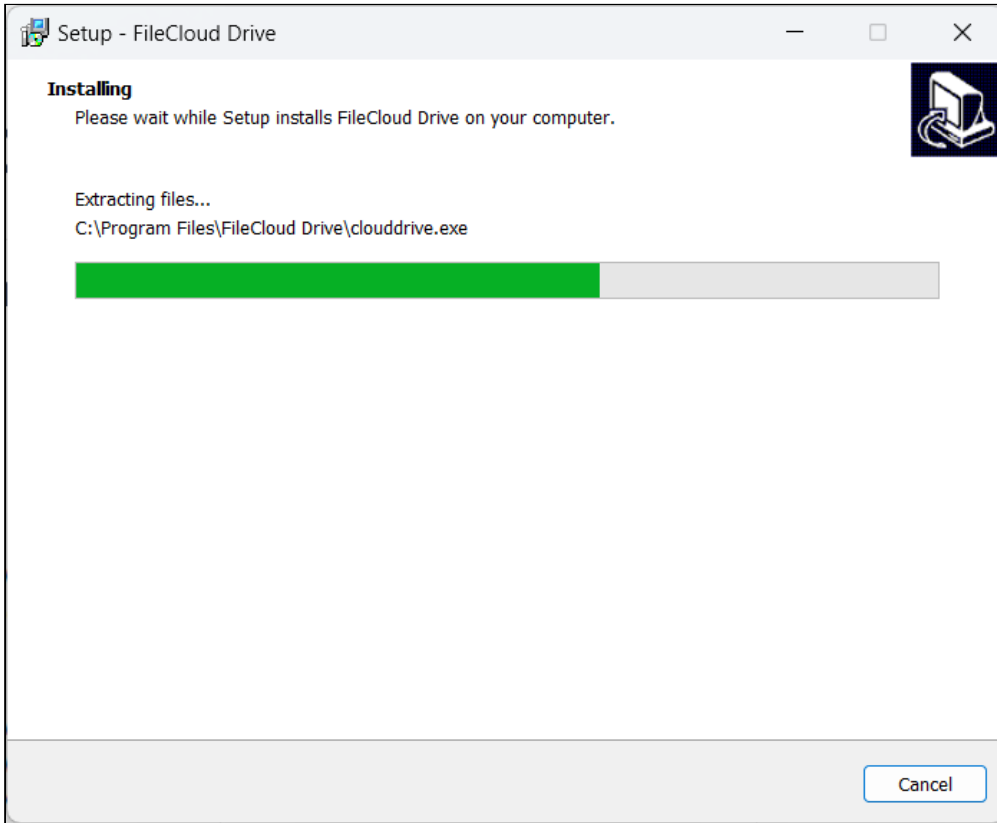
If you are already a Drive user using DocIQ, and this is an upgrade, the next screen gives you the option of using DocIQ or FileCloud for Office. For more information, see [Using FileCloud for Office with Drive](#). If you are a new Drive user, the following screen does not appear.



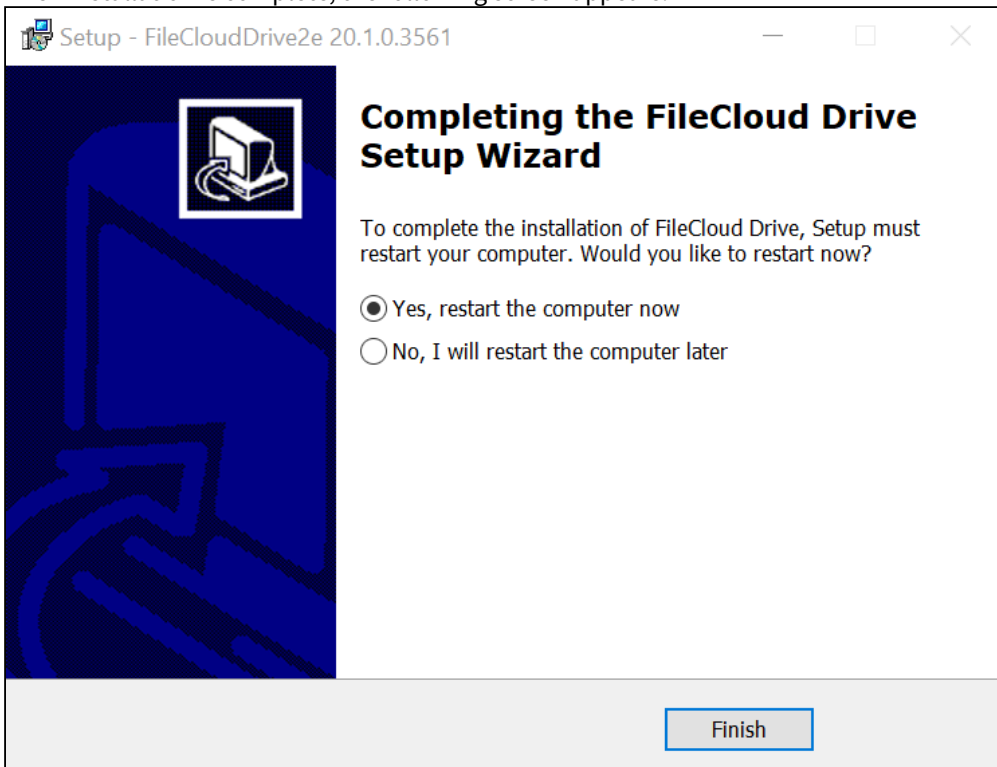
The next screen appears:



5. Click **Install**.  
The wizard shows the installation's progress.



When installation is complete, the following screen appears:



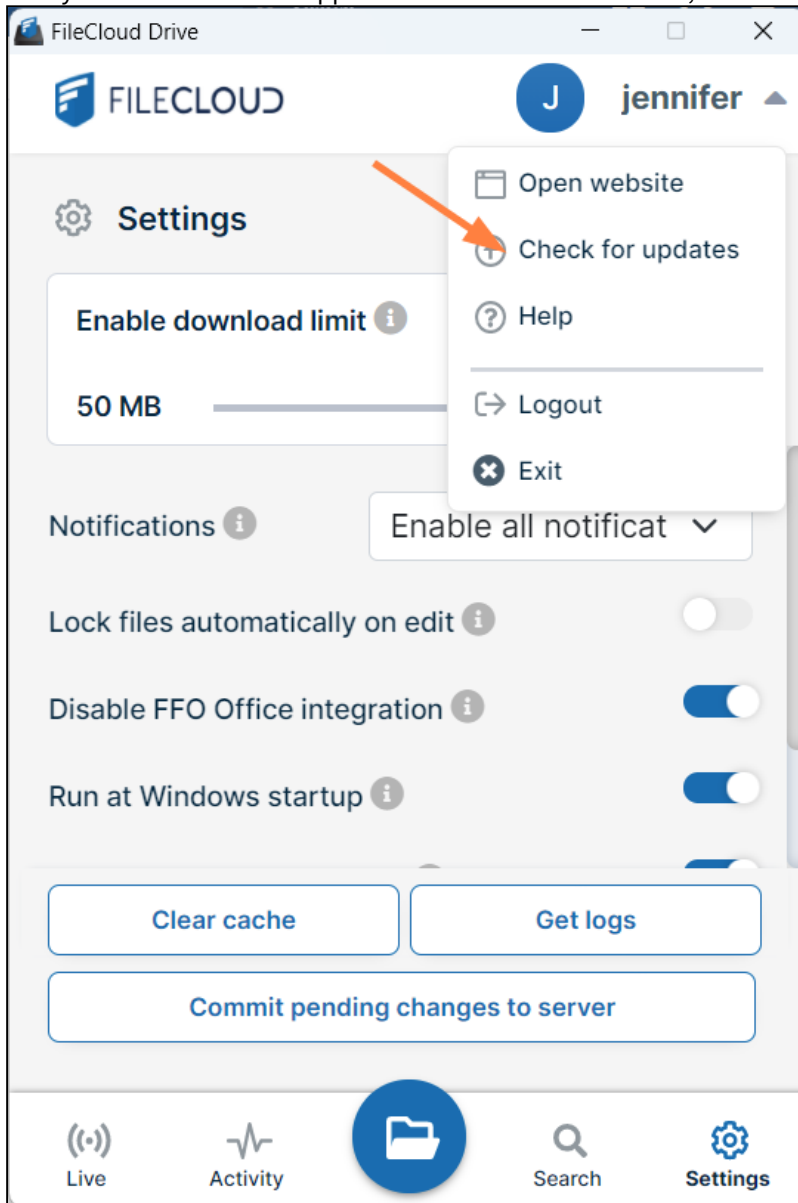


6. Leave **Yes, restart the computer now** selected to begin using Drive or the latest version of Drive, and click **Finish**.

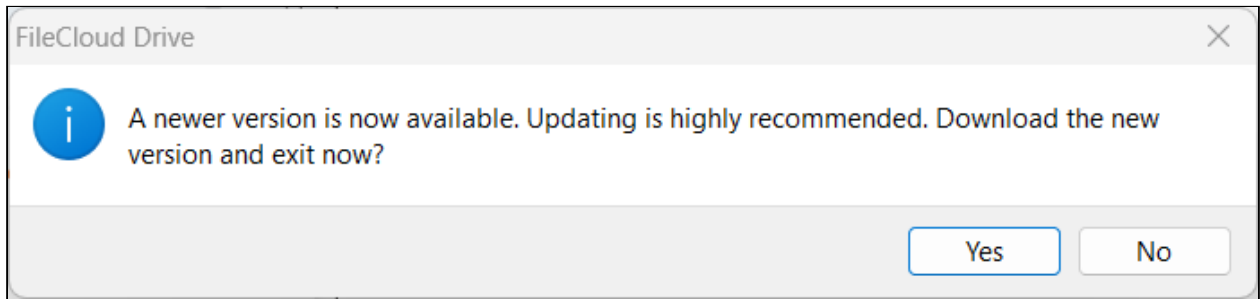
## Checking for Drive Updates

### To check if there are updated versions of Drive:

1. Click your username in the upper-left corner of the dashboard, and choose **Check for updates**.



If there is a new version of Drive available, the following message appears:



2. Click **Yes**.  
Drive is closed and the new installation file is downloaded to your system.
3. Save and run the installation file.  
The new version of Drive is installed and you are prompted to restart your computer.

## Start and Log In to Drive

After installation and restarting your computer, FileCloud Drive should open automatically.

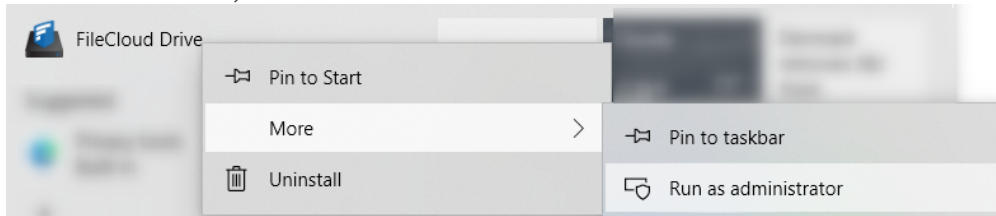
- The same content that is available from the User Portal is listed locally as a drive.
- You can add/delete/edit files that are stored on your FileCloud Server folder from the drive.

## Starting Drive

### Starting Drive and the startup wizard

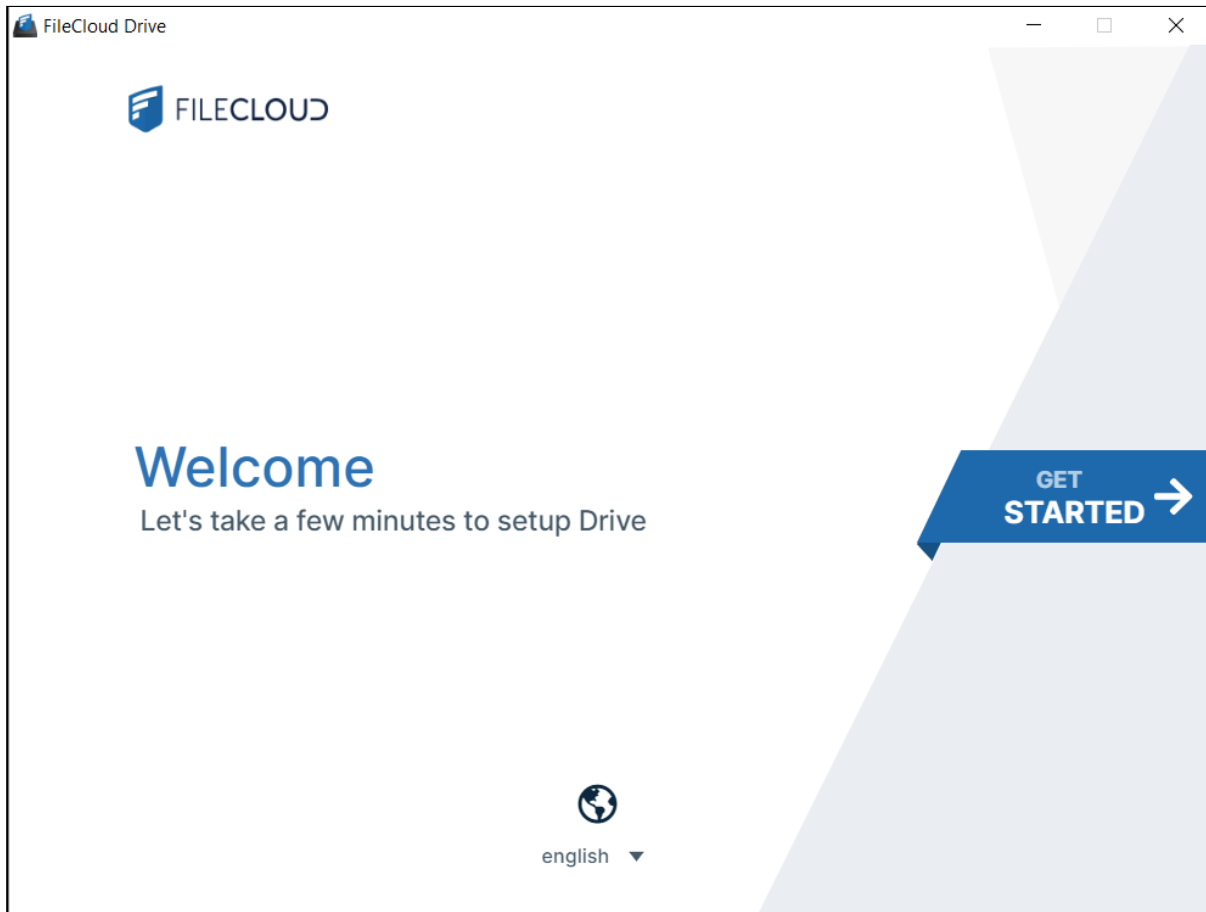
If Drive did not run after you restarted your computer:

1. From the Start menu, click **FileCloud Drive > More > Run as administrator**.



### 1 Start Drive from Start Menu

A log-in window opens.



## 2 Drive Login/Setup wizard, initial screen

2. To change the user interface language from English, use the drop-down list at the bottom of the screen.
3. Click the **Get Started** banner to go to the next screen.

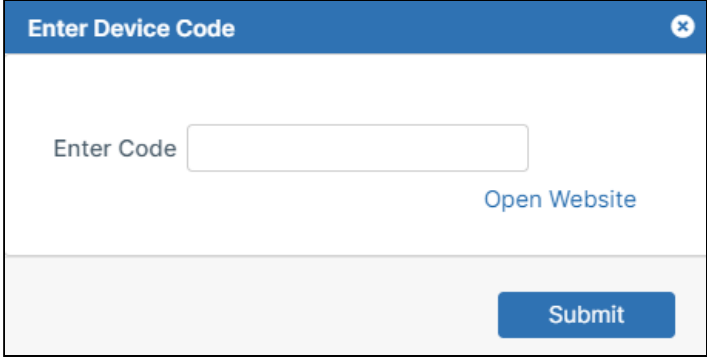
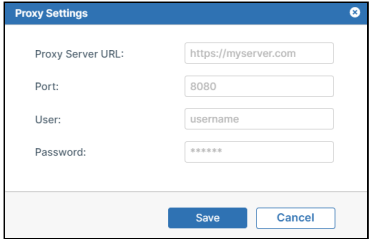
### Step 1: The wizard's log-in screen

After you click the **Get Started** banner in the first wizard screen, the **Login** screen opens:

### 3 Drive Login/Setup Wizard Login screen

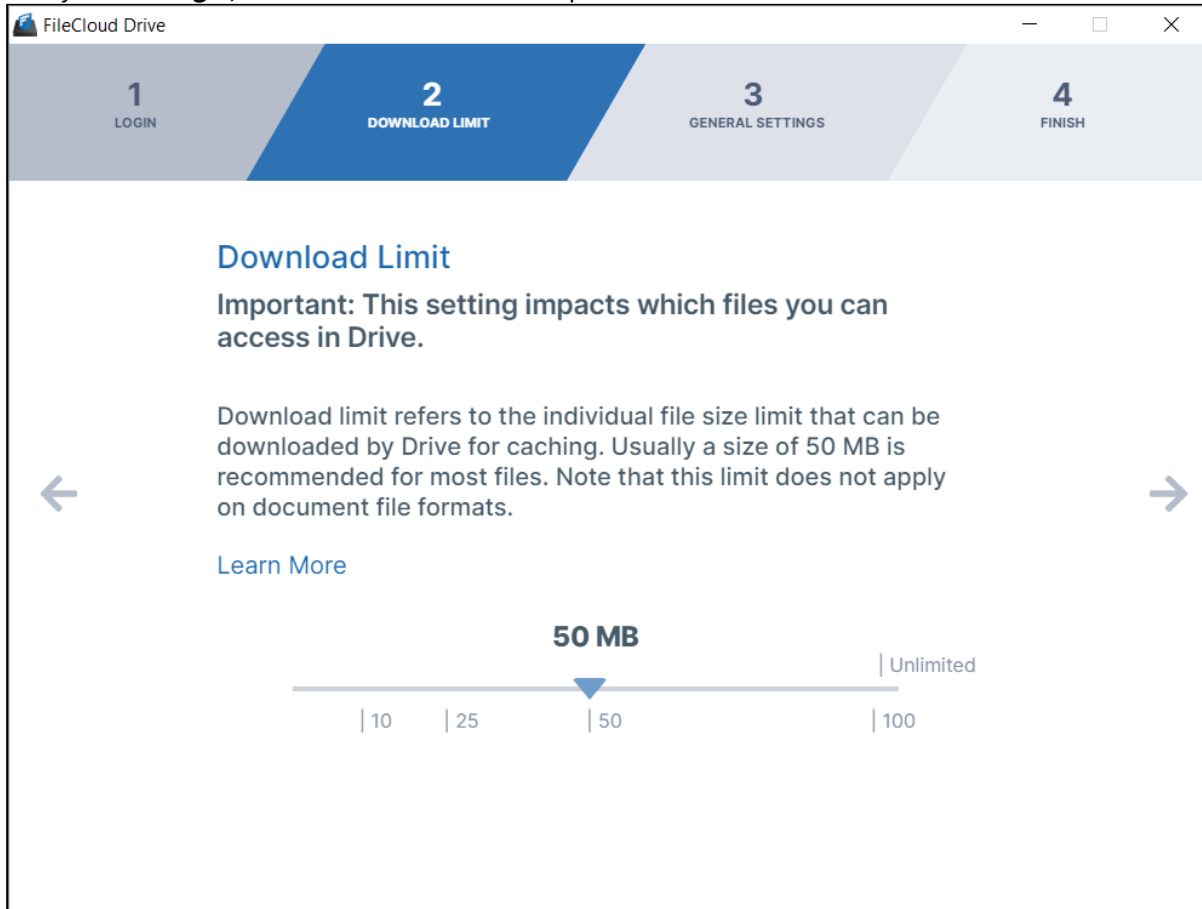
1. Choose a **Login Method**.  
To log in with SSO, see [Log In Using Single sign-on \(SSO\)](#).  
To log in using a device authentication code, see [Using Code Based Authentication for Drive](#).
2. In **Server URL**, enter your server address.
3. In **Account**, enter your username.
4. In **Password**, enter your FileCloud account password.  
You may enter proxy settings instead. See [Proxy server for FileCloud Drive](#).
5. Click **Login**.

Setting	Description	Example
Server URL	<p>The URL to the FileCloud Server.</p> <p>You can find this URL</p> <ul style="list-style-type: none"> <li>• In the Welcome to FileCloud email you received with your user account</li> <li>• By contacting your Administrator</li> </ul>	<p>https:// &lt;myteam&gt;.&lt;filecloud_site&gt;.com</p>

Setting	Description	Example
Account	Your FileCloud account name or email address. You can find this URL <ul style="list-style-type: none"> <li>In the Welcome to FileCloud email you received</li> <li>By contacting your Administrator</li> </ul>	<user name>  username@myteam.myfilecloud.com
Password	The password to your FileCloud account.	
SSO	Single sign-on (SSO) is a user authentication process that permits you to enter one name and password in order to access multiple applications.	Drive users can read about:  ➔ <a href="#">Log In Using Single sign-on (SSO)</a>
Device Authentication Code	This allows you to get a Device Authorization Code to connect to the server instead of a username and password. Your administrator must configure this option. If they do: <ol style="list-style-type: none"> <li>You must enter the server URL, the user account name (or email), and then click the "Request Access" button.</li> <li>If the request access was successful, you will get the following dialog which needs a device authorization code to login.</li> </ol> 	Administrators can read about:  ➔ <a href="#">Configuring Desktop Apps Login support - Code Based Authentication</a>  Drive users can read about:  ➔ <a href="#">Using Device Authorization Codes</a>
Proxy Settings	If your company requires a proxy server to connect to internet, then you must provide that information. In the log-in screen of the dashboard, click Proxy Settings in the wizard's Log In screen.	➔ <a href="#">Enter Proxy Settings</a>  

**Step 2: The wizard's Download Limit screen**

After you click **Login**, the **Download Limit** screen opens.



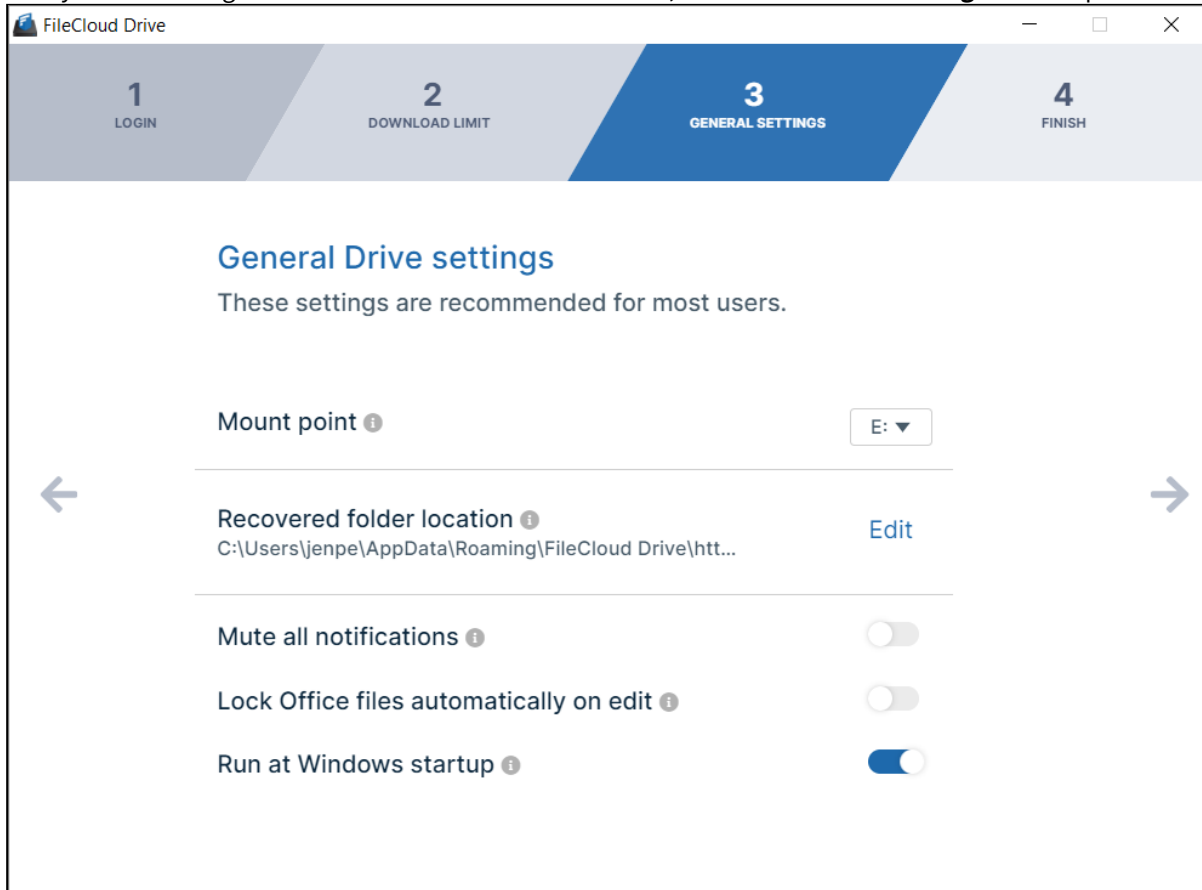
Before a user can read or update a file in Drive, the file must be fully downloaded, which may lead to heavy bandwidth usage. To limit this, FileCloud Drive has a maximum file size download limit setting which is set to 50 MB by default. You may adjust this setting depending on your system's performance and the size of files that your users commonly access in Drive.

**i** The download limit does not apply to the following file types: .txt, .rtf, .doc, .docx, .xls, .xlsx, .ppt, .pptx, and .indd.

1. To change the **Download Limit**, move the arrow to the left or right.
2. Click the right arrow to go to the next wizard screen.

### Step 3: The wizard's General Settings screen

After you click the right arrow in the **Download Limit** screen, the **General Drive Settings** screen opens.

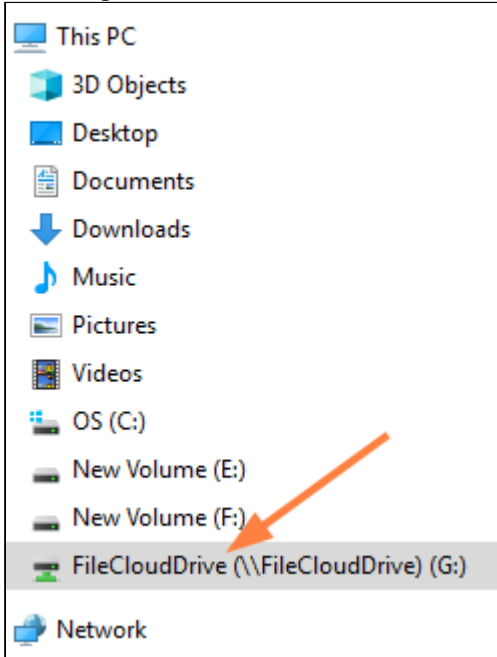


1. **Mount Point** is entered automatically as your next available drive letter. Optionally, choose a different drive letter in the **Mount Point** drop-down list.
2. By default, **Recovered folder location** is set to %APPDATA%/FileCloudDrive/data/Recovered. Click **Edit** to select a new location. For information about recovering files, see [Recover Files After Interrupted Drive Uploads](#).
3. By default, system notifications are enabled. To turn off system notifications, click the slider button for **Mute all notifications** until it is enabled.
4. By default, when Office files are opened for edit, they are not locked. To lock Office files files when they are opened, click the slider button for **Lock Office files automatically on edit** until it is enabled.
5. By default, Drive runs when Windows starts up. To disable running of Drive when Windows starts, click the slider button for **Run at Windows startup** until it is disabled.
6. Click the right arrow to go to the next wizard screen.

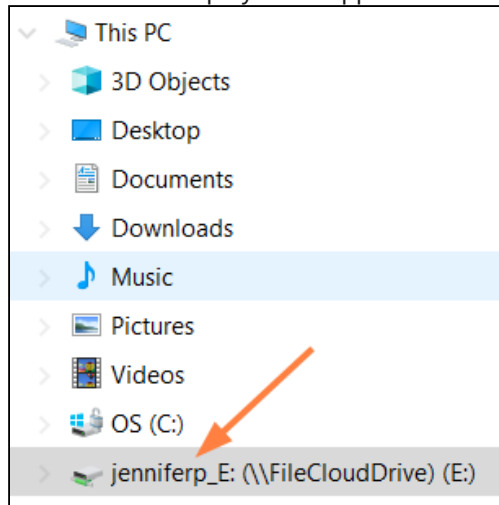
#### Setting the mount point's the volume name:

- By default, FileCloud Drive autogenerates a generic and unique volume name like FileCloudDrive.

- The autogenerated volume name will be the productname (FileCloudDrive or Whitelabeled name)



- To have the volume label use the user's display name:
  - Open the FileCloud Drive configuration file for editing.  
It is located in **Program Files/FileCloud Drive/service/config.xml**.
  - Add the following key:  
**<useuniquemountlabel>1</useuniquemountlabel>**  
Now the user's display name appears in the volume name.



### Allowing multiple instances to run:

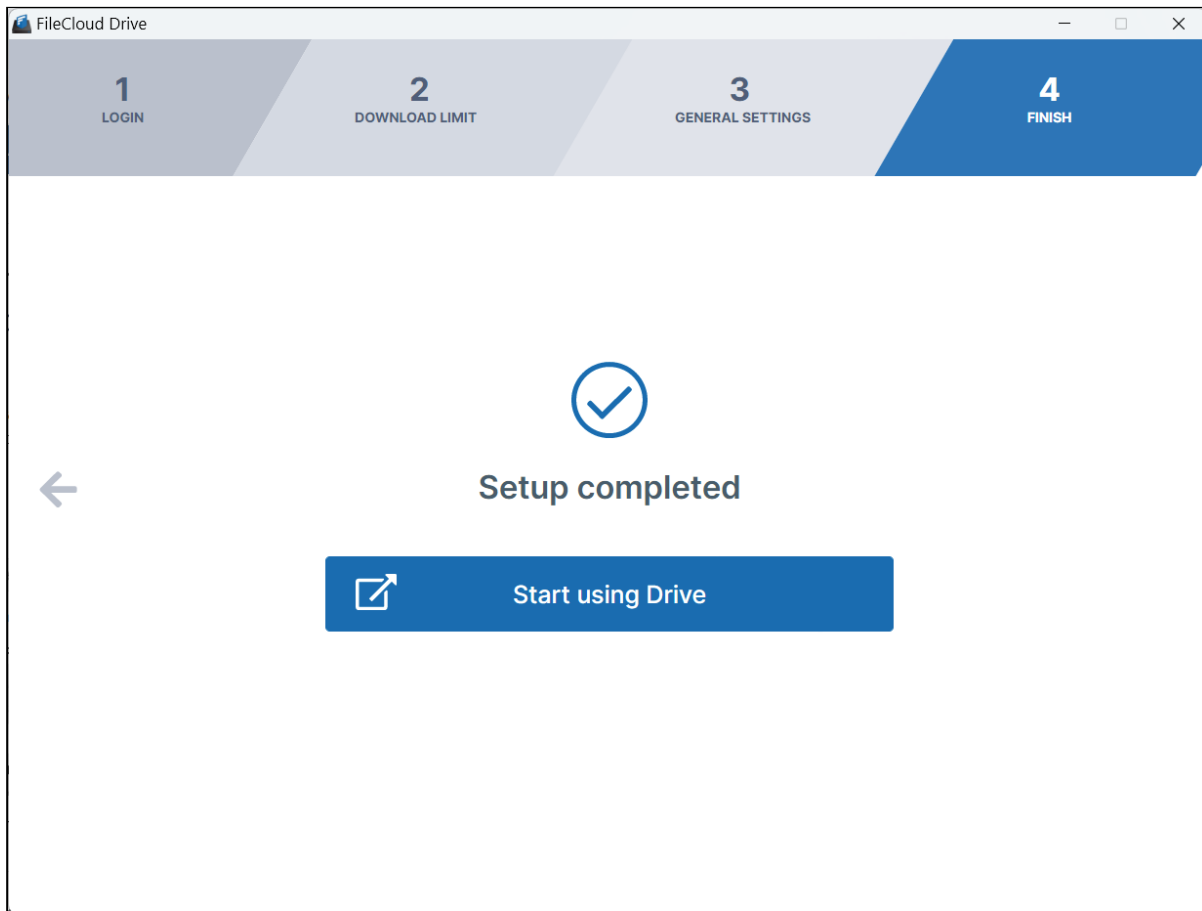
For a server environment where multiple sessions are simultaneously running, use the key: **<useuniquemountlabel>**

- Open the FileCloud Drive configuration file for editing.  
It is located in **Program Files/FileCloud Drive/service/config.xml**.
- To allow multiple instances to run, also include the key:  
**<multimount>1</multimount>**

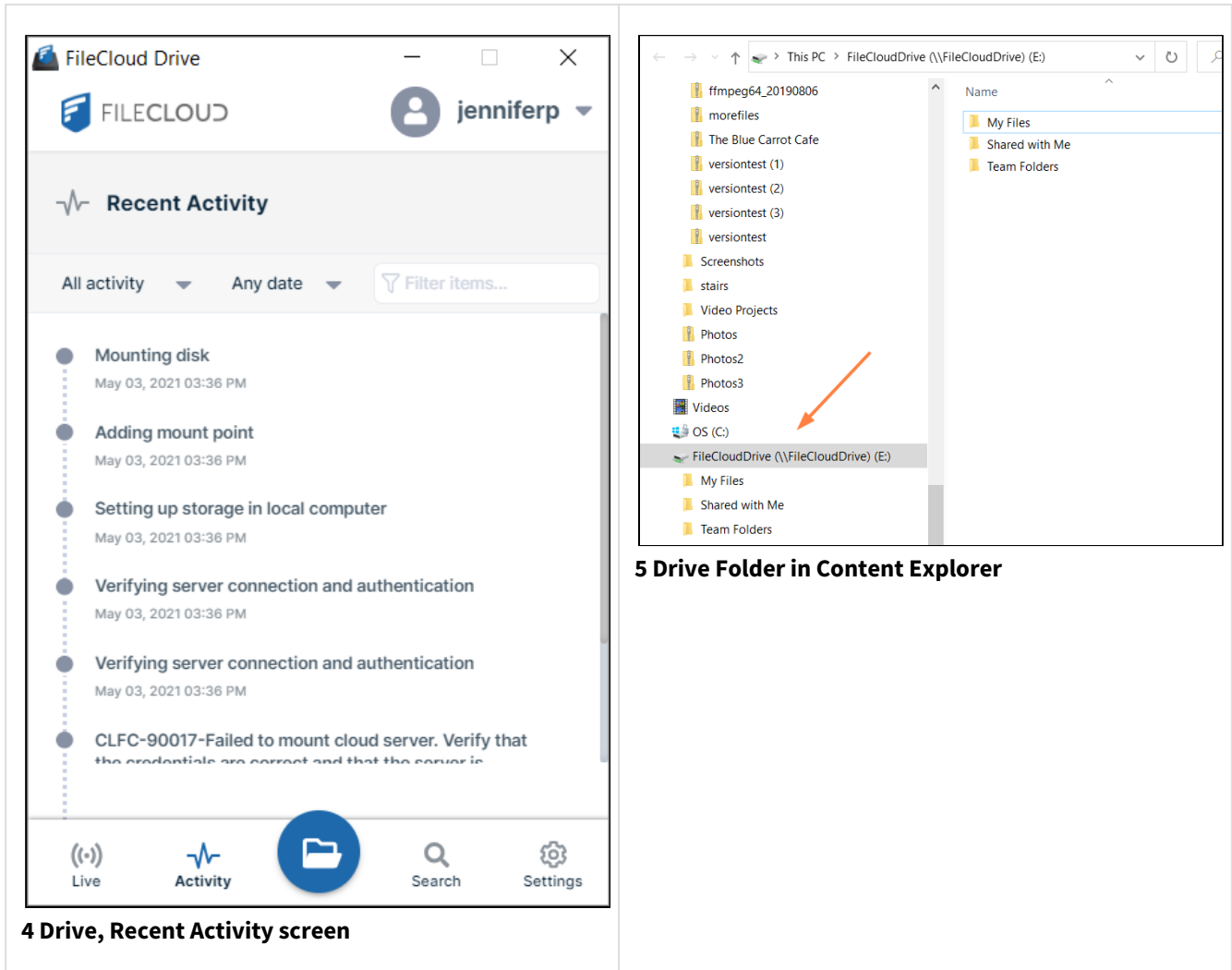


#### Step 4. Finish

After you click the right arrow in the **General Settings** screen, the **Finish** screen opens.



Click **Start using Drive** to open the **Recent activity** screen of the Drive dashboard and the mounted Drive folder in file explorer.



## Related topics

### Log In Using Single sign-on (SSO)

Note: Filecloud only supports SAML SSO. It does not support NTLM SSO.

Single sign-on (SSO) is a type of a user authentication that enables you to log in once to multiple software applications. If your admin sets it up, they will provide you with an SSO username and password.

During FileCloud Drive login, you may choose **SSO** in the **Login** screen of the Startup wizard.

### 6 Drive Login/Setup Wizard, SSO selected

#### To login to FileCloud using SSO:

1. In the **Login** screen of the Drive wizard, for **Login Method**, click **SSO**.
2. In **Server URL**, enter your FileCloud address.
3. Click **Login**.  
You are logged in and taken to the next Drive wizard screen, **Download Limit**.

## Using Code Based Authentication for Drive

Your Administrator may require you to log in with a code instead of a user name and password.

#### To login to the FileCloud Server using a code:

1. In the **Login** screen of the Drive wizard, for **Login Method**, click **Device Authentication Code**.

2. Type in the server URL and the user account name (or email).

FileCloud Drive

1 LOGIN 2 DOWNLOAD LIMIT 3 GENERAL SETTINGS 4 FINISH

## Login to your account

Please log in using one of the methods below.

**Login Method** Password SSO **Device Authentication Code**

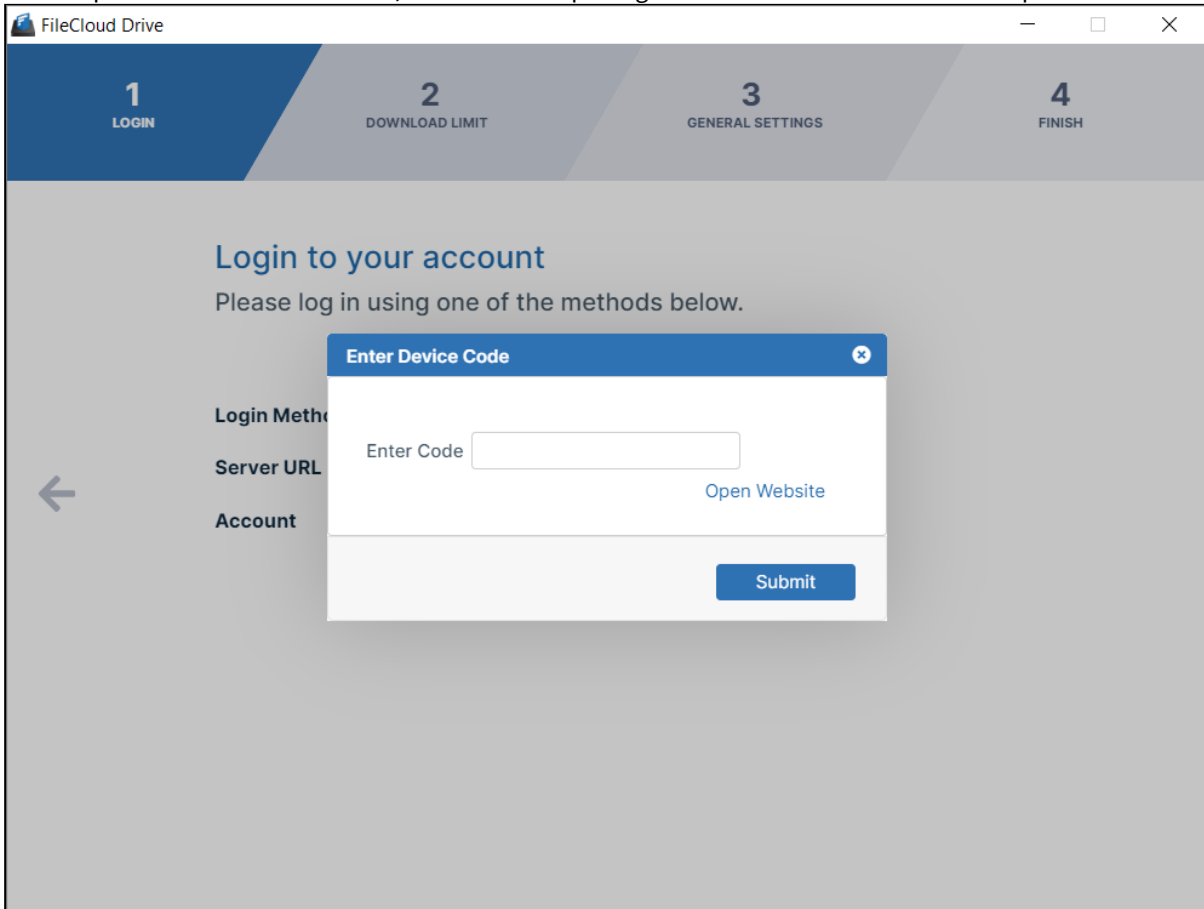
**Server URL**

**Account**

[Proxy Settings](#) [Login](#)

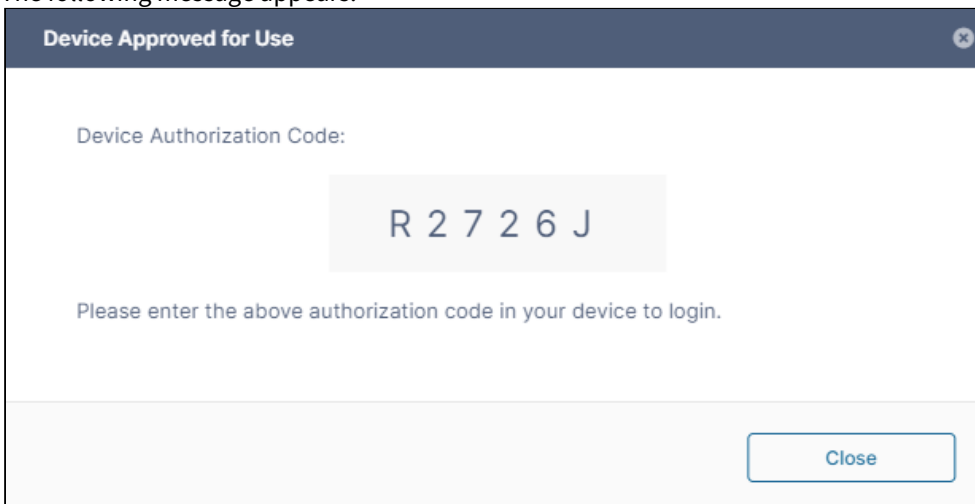
3. Click **Login**.

4. If the request access was successful, a window for opening the **Device Authorization** code opens:



5. Sign in to the FileCloud user portal, and go to Settings > Devices.  
6. Approve the device.

The following message appears:




7. Copy the **Device Authorization Code** and paste it into the authorization code field.  
8. Click **Submit** to log in.

- You are logged in and taken to the next Drive wizard screen, **Download Limit**.

## FileCloud Drive Two-Factor Authentication

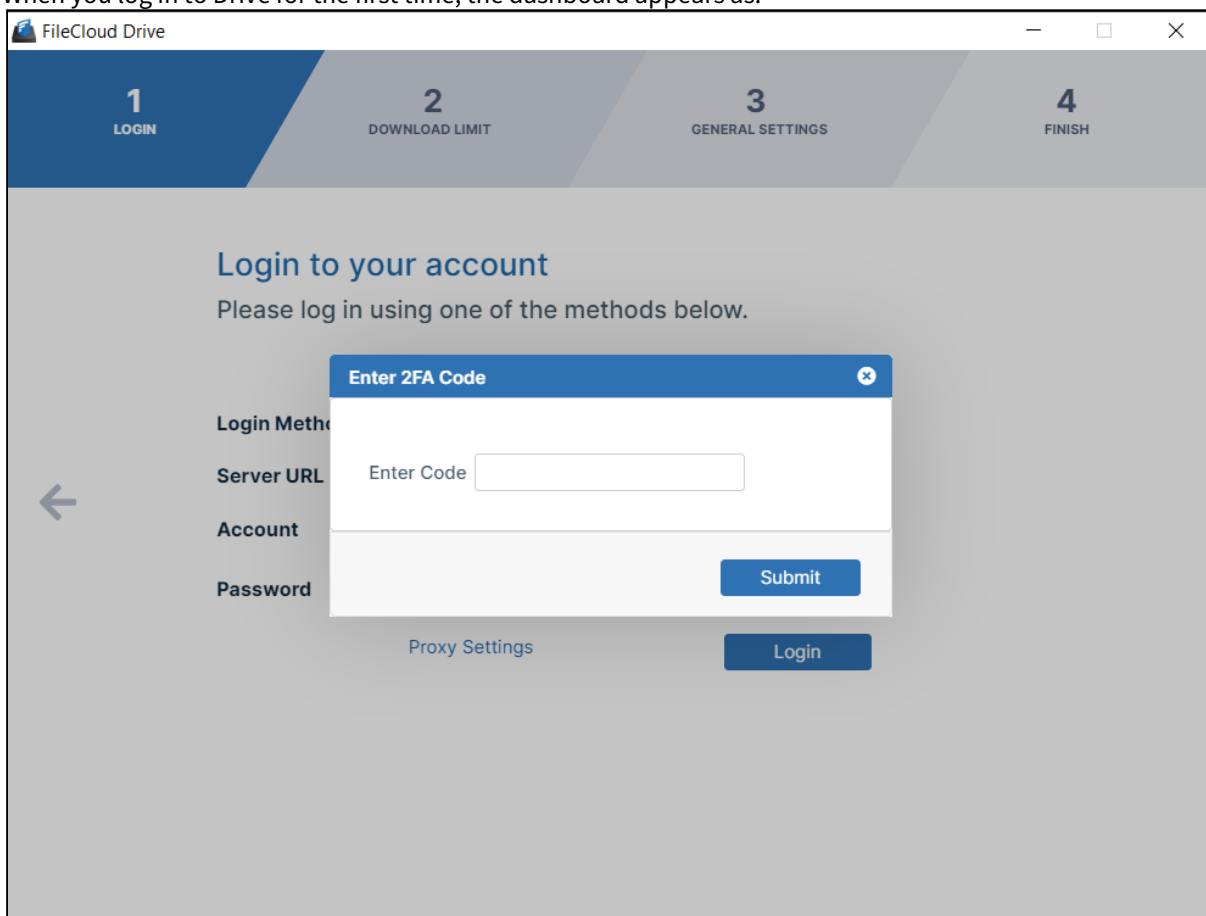
FileCloud Drive supports two-factor authentication (2FA) codes when your administrator enables [2FA](#) in the FileCloud server.

- The code is required the first time a new device is connected.
- On subsequent logins to FileCloud Drive the user is prompted to enter a new 2FA code.

 Two-Factor authentication codes are required if the device record is removed by your Administrator from the [Device Management panel](#)

### To log in when 2FA is enabled:

- When you log in to Drive for the first time, the dashboard appears as:



You receive your authentication code by the method configured by you administrator, such as email or SMS.

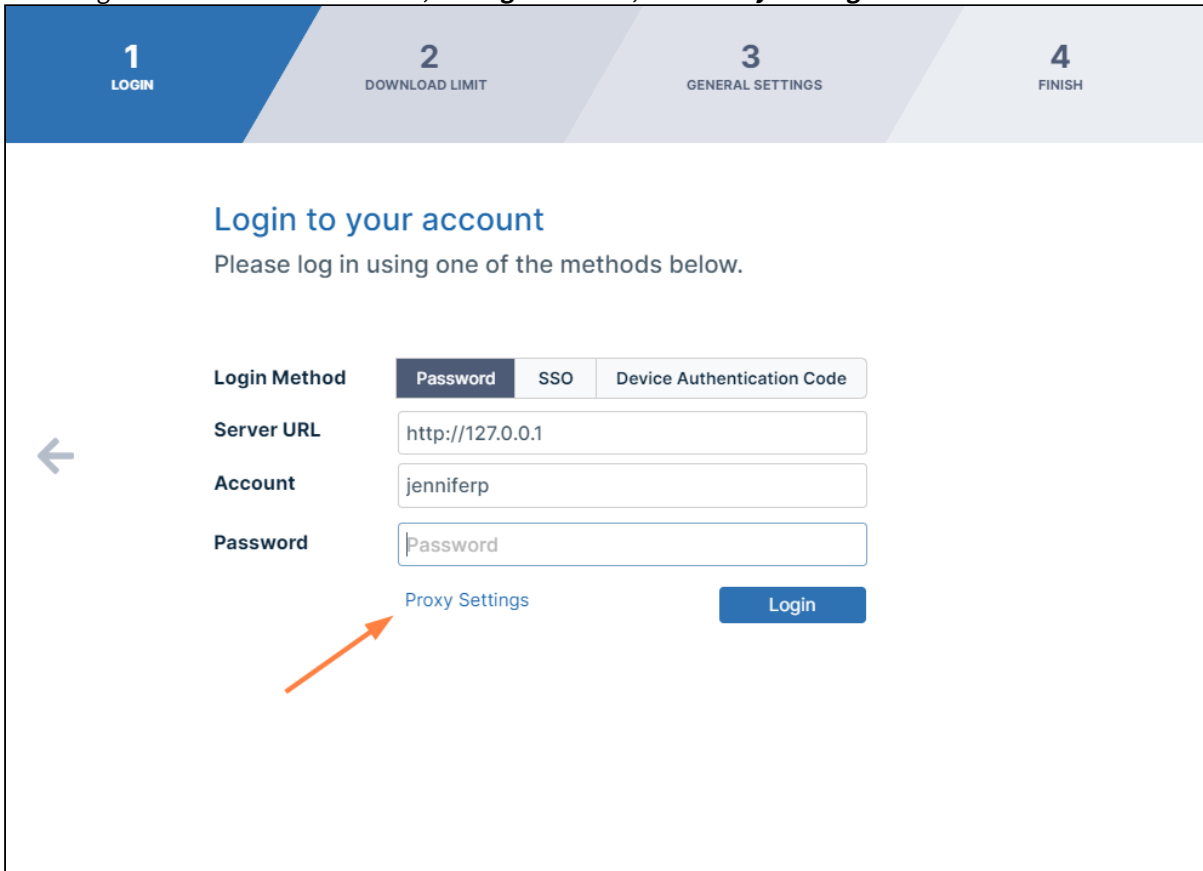
- Enter the code, and click **Submit**.
- You are logged in and taken to the next Drive wizard screen, **Download Limit**.

## Proxy server for FileCloud Drive

FileCloud Drive can use a proxy server to connect with FileCloud server.

To enter proxy settings:

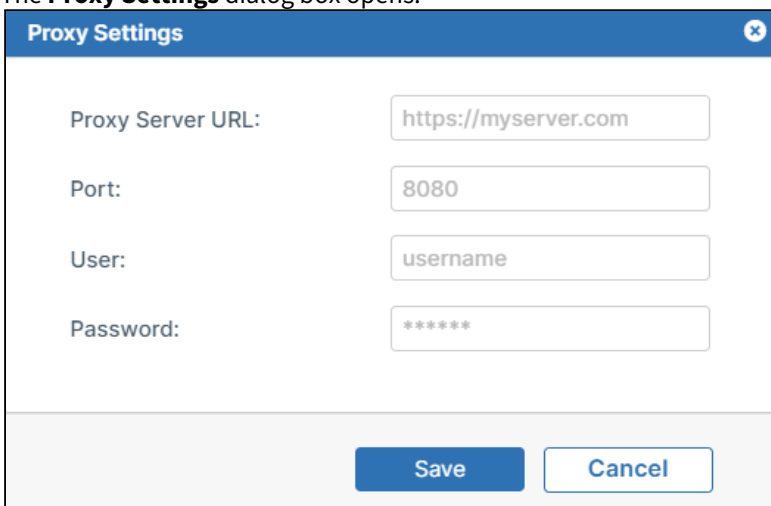
1. In the Login screen of the Drive wizard, for **Login Method**, click **Proxy Settings**.



The screenshot shows the 'Login to your account' screen in the FileCloud Drive wizard. The wizard has four steps: 1 LOGIN, 2 DOWNLOAD LIMIT, 3 GENERAL SETTINGS, and 4 FINISH. The current step is 1. The screen displays the following fields and options:

- Login Method:** Password (selected), SSO, Device Authentication Code
- Server URL:** http://127.0.0.1
- Account:** jenniferp
- Password:** Password
- Proxy Settings:** A link with an orange arrow pointing to it.
- Login:** A blue button.

The **Proxy Settings** dialog box opens:



The Proxy Settings dialog box contains the following fields and buttons:

- Proxy Server URL:** https://myserver.com
- Port:** 8080
- User:** username
- Password:** \*\*\*\*\*
- Save:** A blue button.
- Cancel:** A white button with a blue border.

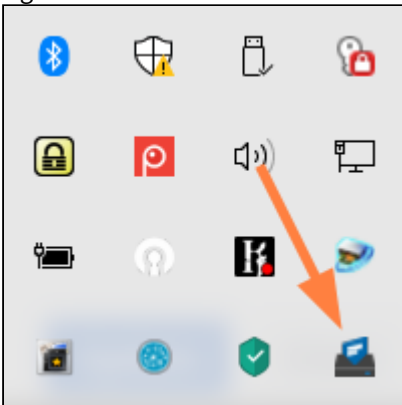
2. Fill in the proxy settings and click **Save**.
3. Click **Login**.
4. You are logged in and taken to the next Drive wizard screen, **Download Limit**.

## FileCloud Drive System Tray Options

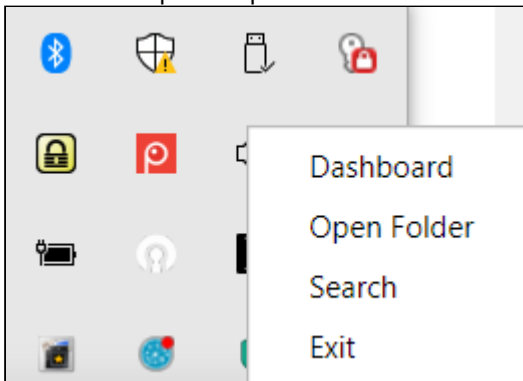
You can use system tray icons to quickly access menu options for opening the FileCloud Drive dashboard, navigating to drive in file explorer, searching for files and exiting FileCloud Drive.

To open the right-click menu:

1. In the lower right corner of your Windows desktop, open the system tray.
2. Right-click on the FileCloud Drive icon.



The menu of options opens:



Option	Description
Dashboard	Opens a window of FileCloud Drive activity and settings.



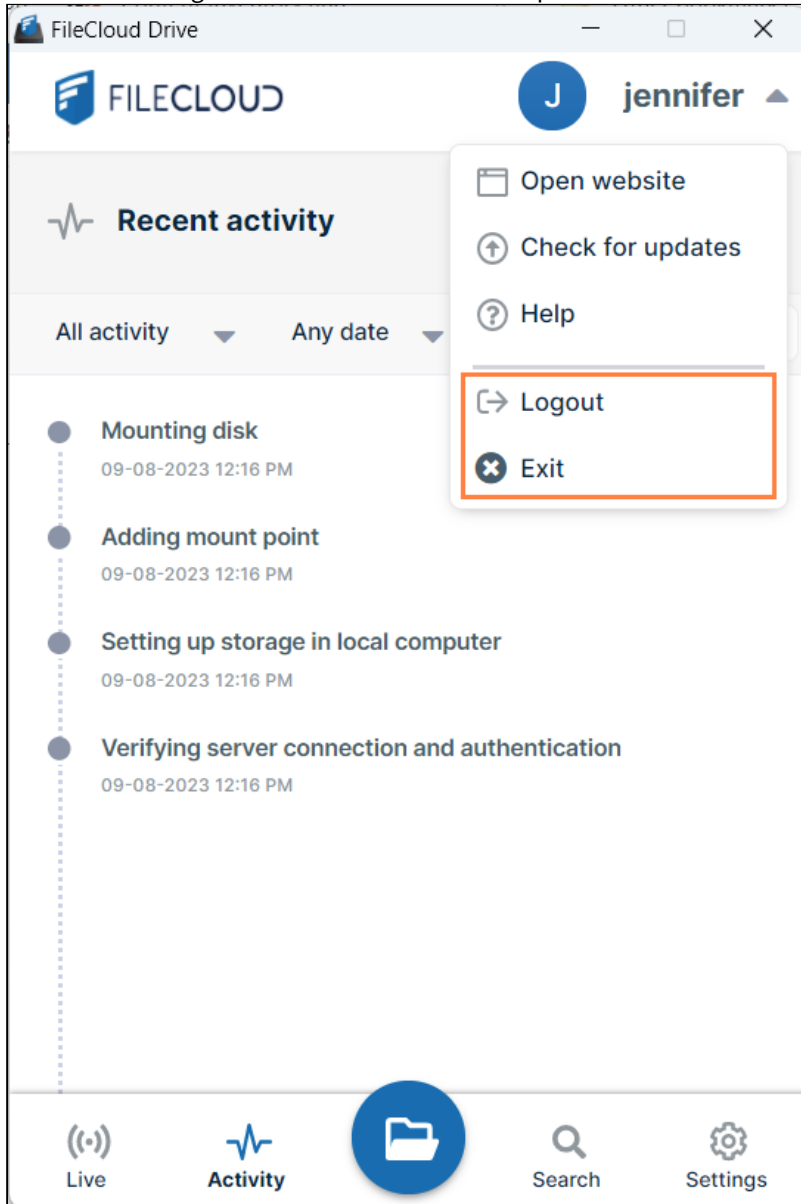
Option	Description
Open Folder	Launches an explorer window that displays the contents of the mounted drive volume. If the remote server is not available or configured then nothing is launched.
Search	Opens a FileCloud Drive Search window where you can type in a keyword, browse to a specific folder, and set Advanced Search options. For more information, read <a href="#">Searching in Drive</a> .
Exit	Unmount and exit FileCloud Drive application.

## Exit or Log Out of Drive

When you exit Drive, your session ends, but your username, password, and configuration settings are saved, so that when you re-open Drive, your settings are automatically filled in.

Logging out of Drive removes your username, password, and configuration settings and takes you back to the startup wizard, where you must enter your server URL, account, and password and configure Drive.

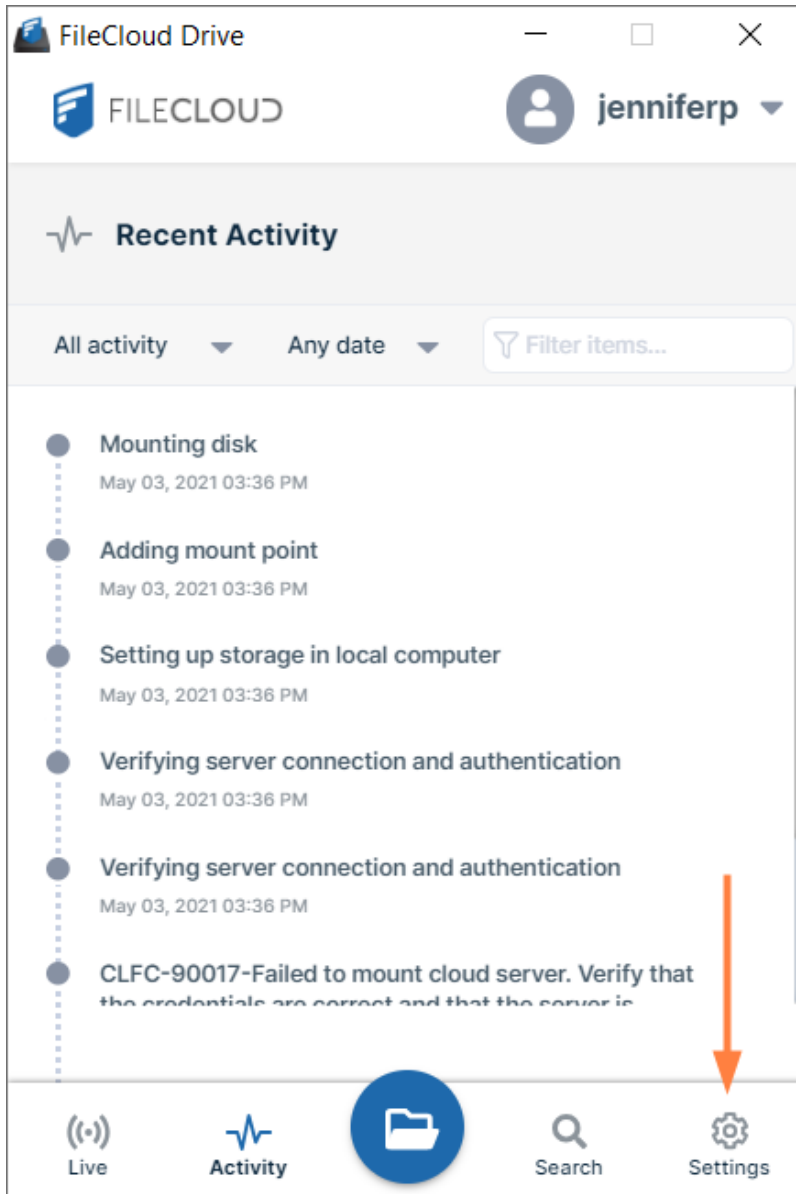
You can exit or log out of Drive from the user drop-down list in the Drive dashboard.



## Settings

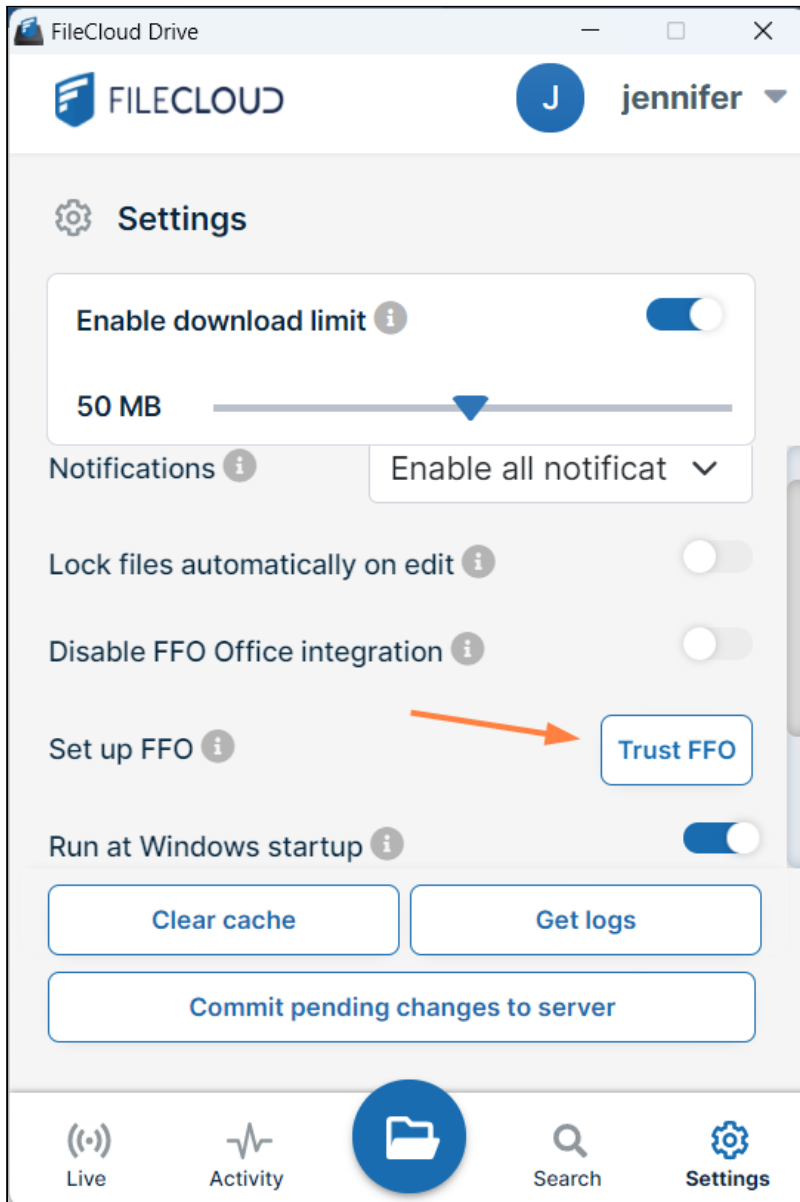
### To change settings for FileCloud Drive:

1. [Log in to Drive](#).
2. At the bottom of the Drive dashboard, click the **Settings** button.

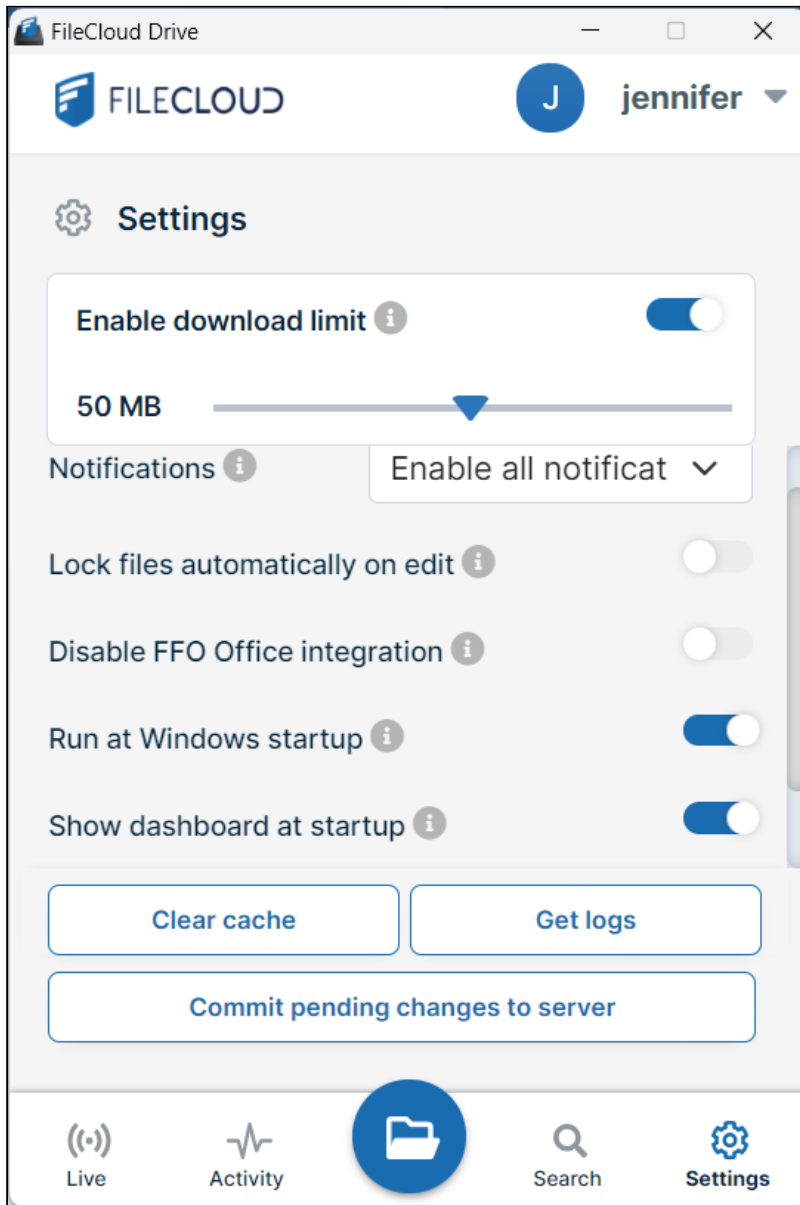


### 7 Drive, Settings button

The Settings screen of the dashboard opens. The first time you open it after installing, a **Trust FFO** button appears (unless you have chosen to continue to use docIQ.)



After you click **Trust FFO** once, it does not appear on the settings screen again. Now when you click **Settings**, the following screen appears. If you have chosen to continue using DocIQ, the label **Disable DocIQ Office integration** appears instead of the label **Disable FFO Office integration**.



3. Change any settings.

For more information about the settings, click or expand the links below:

### Enable and set the download limit

FileCloud Drive sets a limit on the size of files you can download (with exceptions for some file types) to 50MB by default.

**i** File types that this limit does not apply to are: .txt, .rtf, .doc, .docx, .xls, .xlsx, .ppt, .pptx, and .indd.

This default limit is set for the following reasons:

- FileCloud Drive must download a file from the server before it can be read, modified, or updated.

- Windows can pre-fetch files to improve user experience and can request files that are not actively used.
- This activity can sometimes cause heavy bandwidth usage.
- To limit this, FileCloud Drive has a maximum file size limit setting to prevent downloading large files.

To change the download limit size, slide the pointer to the left or right.

To disable the download limit, click the **Enable download limit** slider until it appears gray.

### Notifications

The default setting is **Enable all notifications**, which enables display of both Drive system toast notifications and floating status notifications.

You may change the setting to:

**Mute all notifications** - Disables display of both system toast and floating status notifications. **Note:** *File transactions and important notifications may be missed.*

**Mute system notifications** - Disables display of system toast notifications, but enables display of floating status notifications.

**Mute app notifications** - Disables display of floating status notifications, but enables display of system toast notifications. **Note:** *File transactions and important notifications may be missed.*

### Lock files automatically on edit

Use the automatic lock feature to lock a file on the FileCloud server while it is being edited by one user to prevent another user from editing it at the same time.

By default, the automatic lock feature is disabled. To enable it, click the **Lock files automatically on edit** slider.

Note that only certain types of files can be automatically locked. For more information, see [Automatic Locking in FileCloud Drive](#).

### Disable DocIQ/FFO Office integration

If you have installed [FileCloud for Office](#), the first time you log in and view settings, a **Set up FFO** label and a **Trust FFO** button appears. You must click the **Trust FFO** button to install the certificate for FFO. This removes the **Set up FFO** label and **Trust FFO** button from **Settings**. They will not appear again. However, to use FFO, you are still required to [include the FFO add-in](#).

[FileCloud for Office](#) (or [DocIQ](#)) is enabled by default. To disable it, click the **Disable FFO Office Integration** (or **Disable DocIQ Office Integration**) slider so that it turns blue.

### Run at Windows Startup

By default, FileCloud Drive is run on Windows startup. To prevent Drive from automatically running on startup, click the **Run at Windows Startup** slider so that it turns gray.

### Show Dashboard At Startup

By default, when FileCloud Drive starts, it automatically displays the dashboard. To prevent Drive from automatically displaying the dashboard when it starts, click the **Show Dashboard At Startup** slider so that it turns gray.

### Clear Cache

If Drive is not displaying updated information or is running slowly, clear your cache by clicking the **Clear Cache** button.

### Get Logs

To open the folder that stores Drive log files, click the **Get logs** button.

### Commit Pending Changes to Server

If you experience a lag between the time you perform an action and the time it is committed to the server, click **Commit Pending Changes to Server** to commit the changes to the server now.

## Automatic Locking in FileCloud Drive

Automatic locking is only supported for certain file types in Drive. When you open file types that do not have automatic lock support, you must manually lock them to ensure that Drive does not attempt to upload them while they are being edited.

### Automatic locking of Adobe and Quickbooks files

In Drive in Windows, automatic locking is supported for the following file types:

- Microsoft Word
- Bluebeam Revu
- Adobe InDesign
- Adobe Illustrator
- Microsoft PowerPoint
- Microsoft Excel
- Corel WordPerfect
- Quickbooks
- AutoCAD

To enable the automatic lock feature, see [Settings](#).

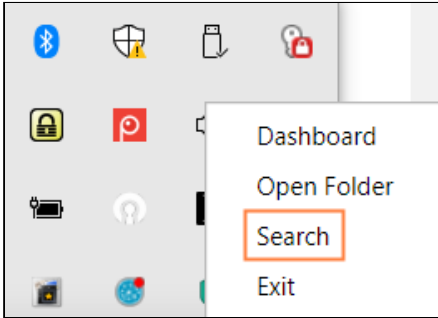
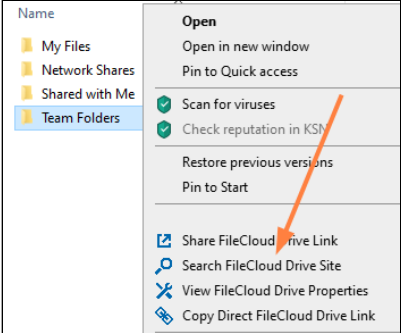
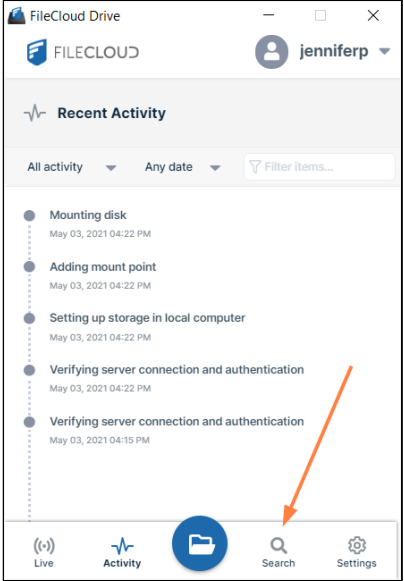
## Working in FileCloud Drive

### In this section:

### Searching in Drive

From 18.1 FileCloud users are able to search for files using a desktop client.

## How do I access the search window?

<p>Initiating search from the Drive system tray</p> <p>The taskbar Search option opens the basic Search UI with the default search path.</p>  <p><b>8 Search option from Drive icon in system tray</b></p>	<p>Initiating search from the Drive folder</p> 	<p>Initiating search from the dashboard</p> 
---	---	---

## Basic and Advanced Search

<p><b>Basic search view</b></p>	<p><b>Advanced search view</b></p>
---------------------------------	------------------------------------



Enter a search term, and click **Enter**. The files and folders returned are listed in the lower portion of the Search window.

By default, file names, content, and metadata are searched. To include folders in the search or to filter the search, click **Show advanced options**.

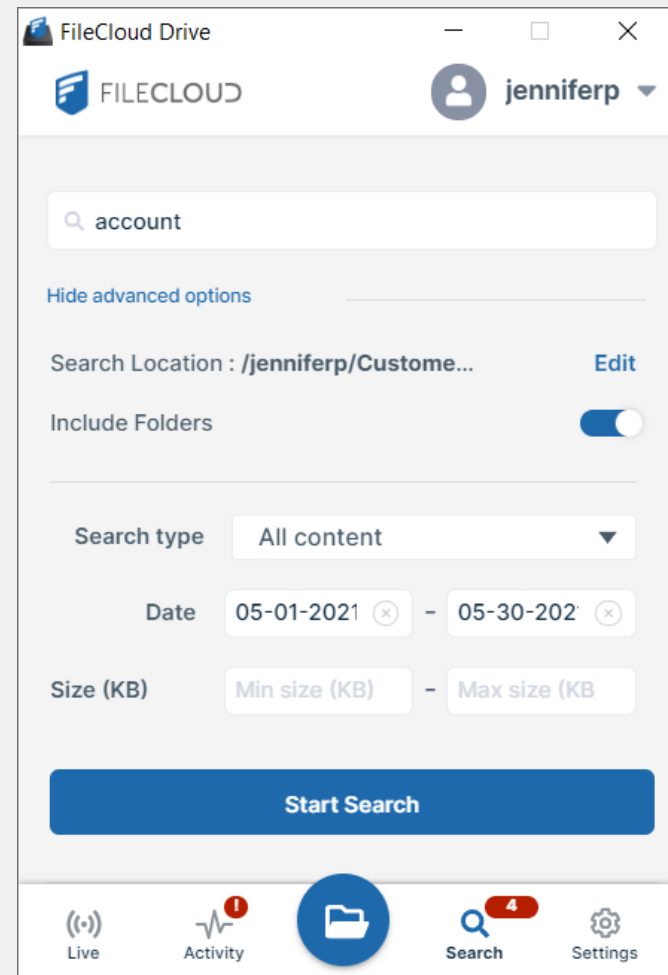
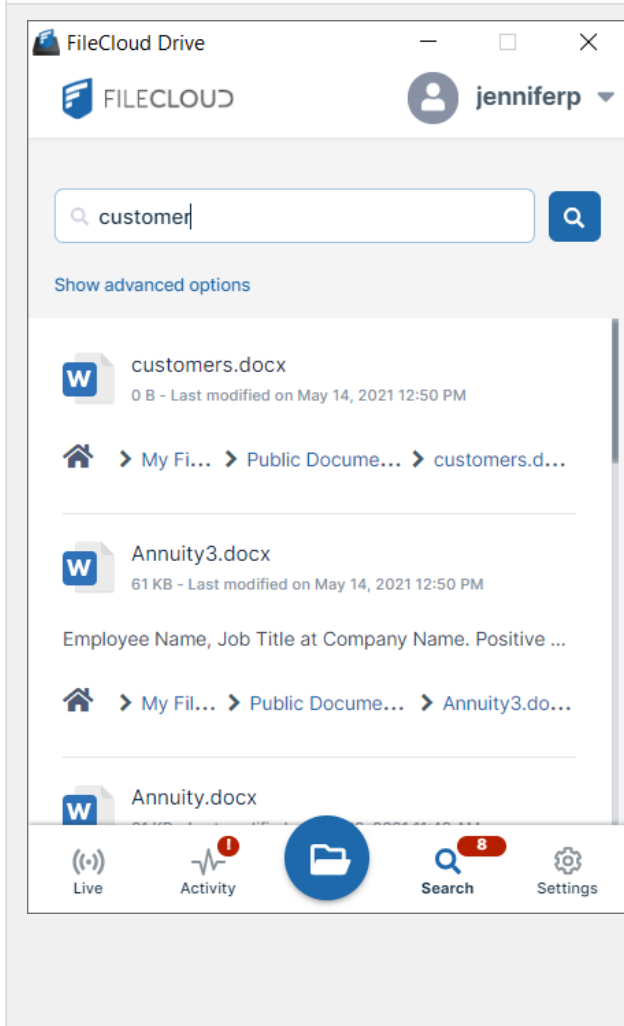
The number of items found appears in the red oval near the Search icon at the bottom of the view.

Click **Show advanced options** in the basic search to view the advanced options fields. Configure any of the advanced options:

- **Search Location** - Click **Edit** and navigate to the folder path that you want to search
- **Include Folders** - Toggle the button to include folders as well as files in the search
- **Search type** - **All content** (default), **Name only**, **Content only**, or **Metadata**
- **Date** - Enter a date range
- **Size (KB)** - Enter a size range

Click **Start search** to begin the search. The results appear in the basic search view.

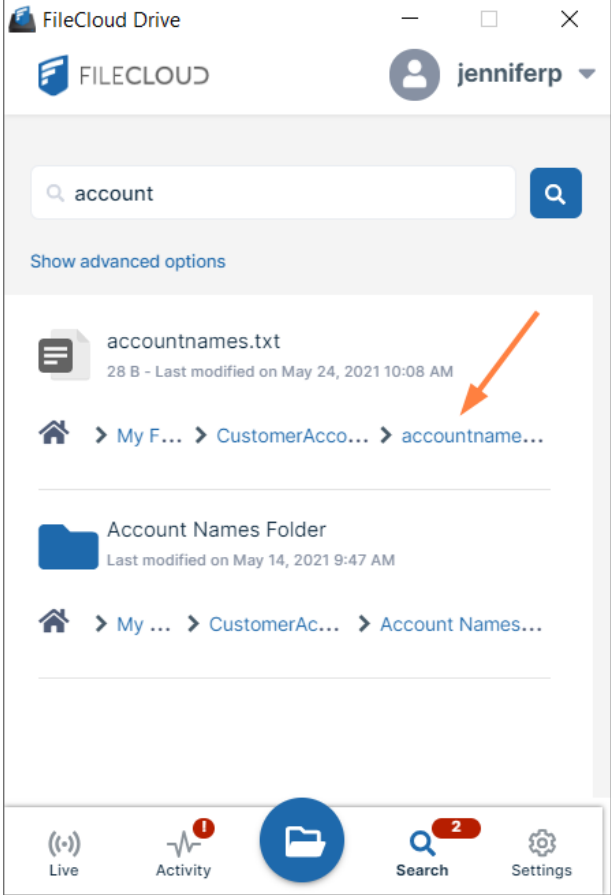
The number of items found appears in the red oval near the Search icon at the bottom of the view.



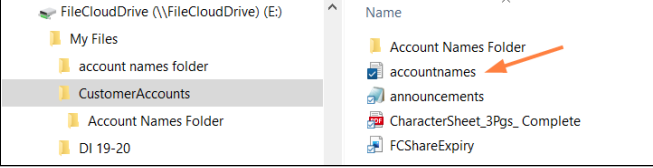
## Accessing items after searching

After your search results are returned, you can access any location in the item's path in content explorer by clicking on it.

**Click here:**



**To open here:**



Also see:

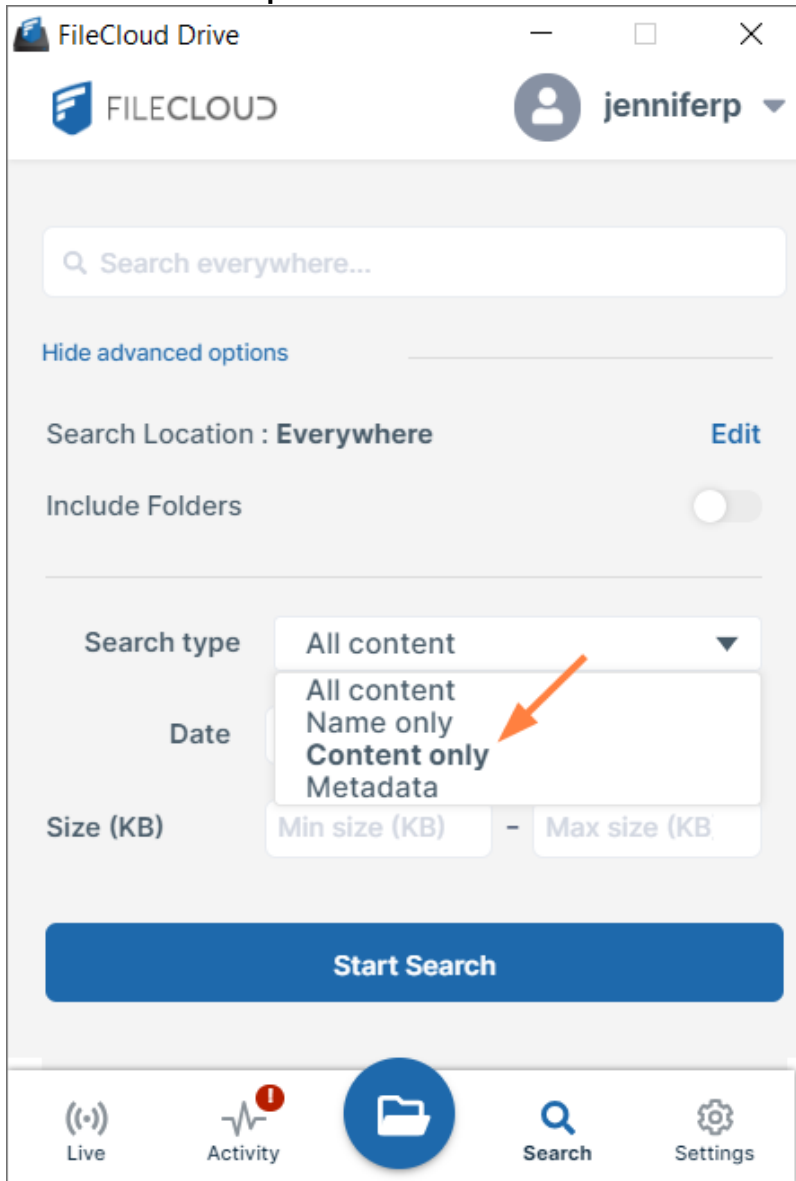
## Content Search in Drive

Content search enables you to search through the text in file types such as txt, pdf, doc, docx, xls, xlsx, ppt, pptx. Search results display the matching term in bold.

### To perform a content search:

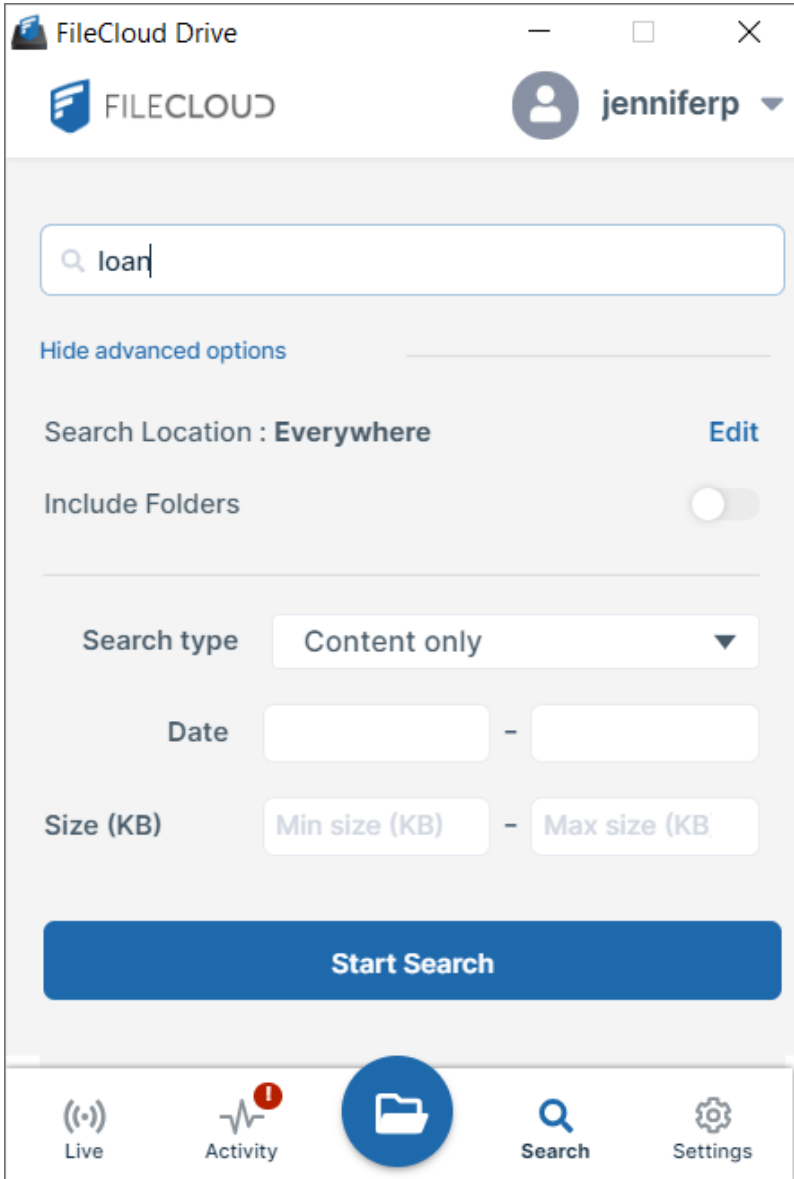
1. [Access the Search window in Drive.](#)

2. Click **Show advanced options**.



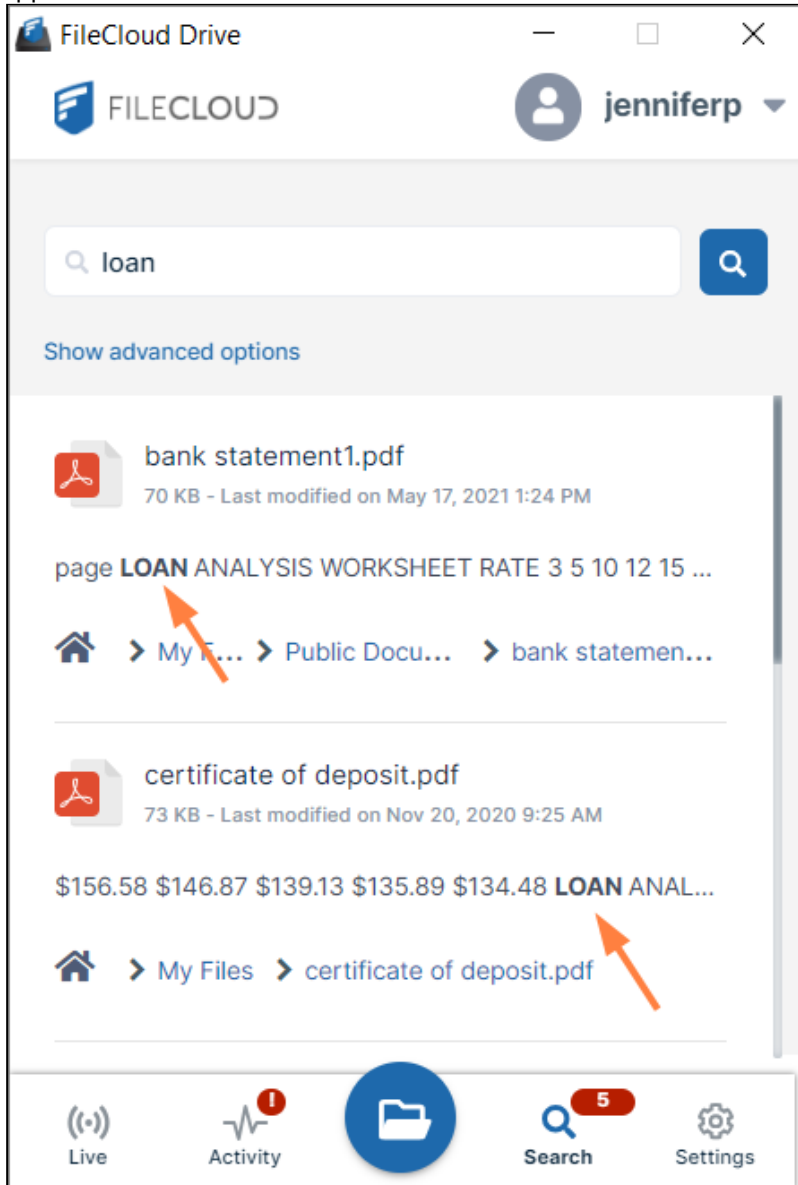
3. In the drop-down list, choose **Content Only**.

4. Enter a search term.



5. Click **Start Search**.  
The search returns files that include the search term in their content. The phrase including the search term

appears in bold.



## Metadata Search in Drive

You can search on metadata from any of the metadata sets in Drive.

### To search on metadata:

1. Open the [Search window](#) in Drive.
2. Click **Show advanced options**.
3. Choose **Metadata** as the **Search type** and define search conditions.


This video shows you how:



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

*Movie URL not available.*

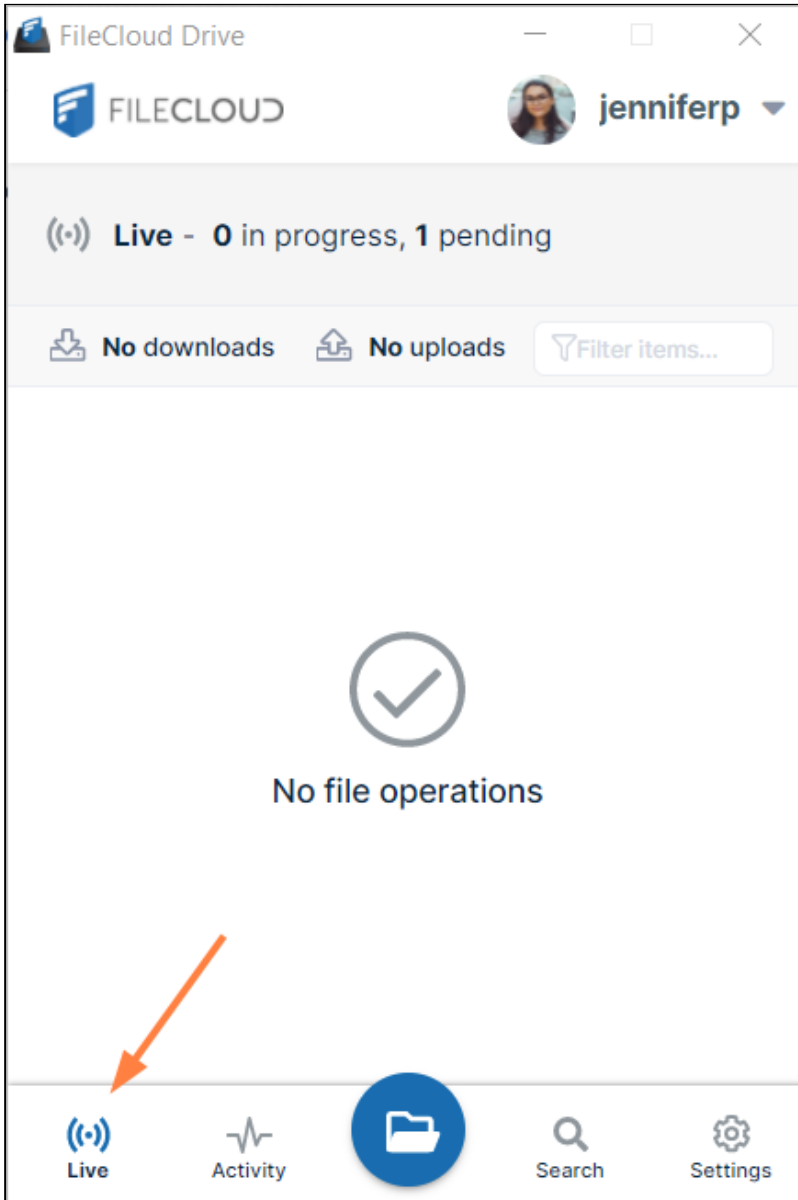
## Viewing FileCloud Drive Activity

 The ability to cancel pending and in progress downloads and to view a count of pending downloads is available in FileCloud version 21.3 and later.

You can view live activity as well as the history of recent activity in FileCloud Drive.

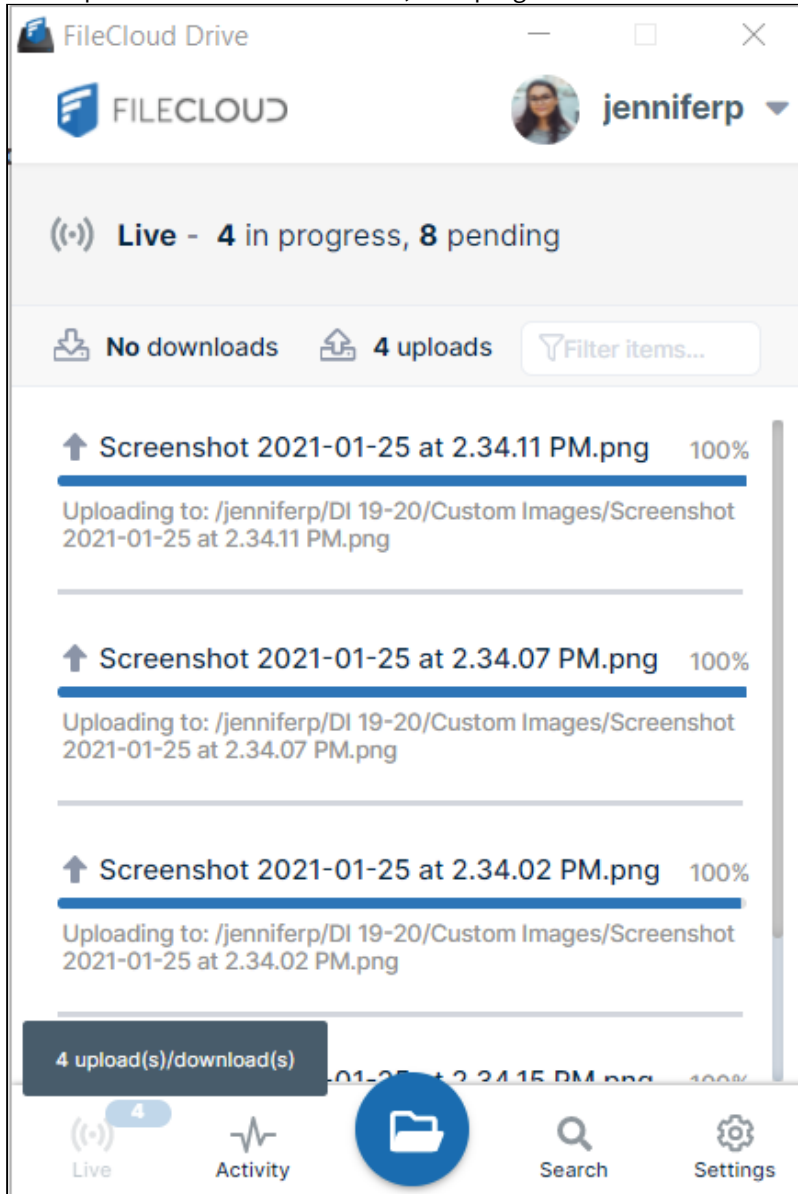
To view live activity in Drive:

1. [Log in to Drive](#), or in the system tray, right-click on the Drive icon, and choose **Dashboard**.  
Click the **Live** button at the bottom of the page.



The number of uploads and downloads pending and in progress appears at the top of the dashboard.

While uploads and downloads occur, their progress is shown on the dashboard.

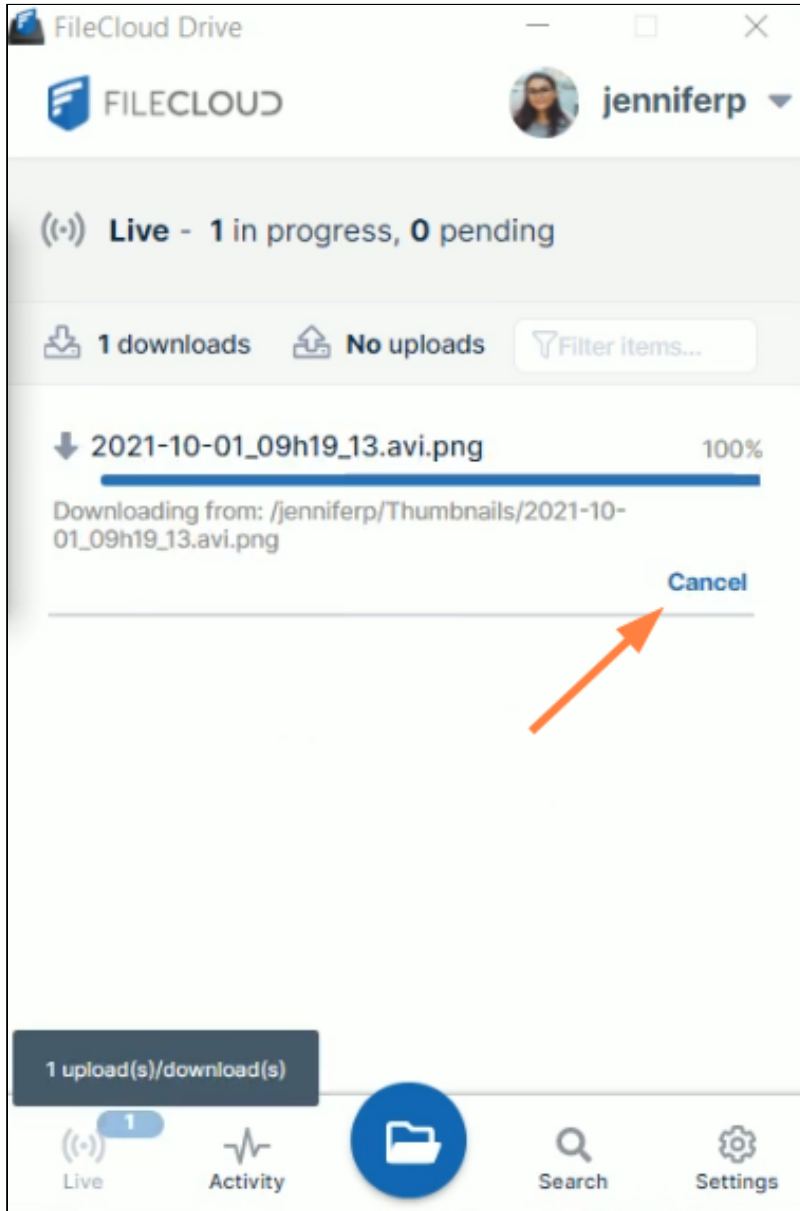


To cancel pending or in-progress downloads in Drive:

While a file's download is still in progress, a cancel button appears to its right on the Drive dashboard.



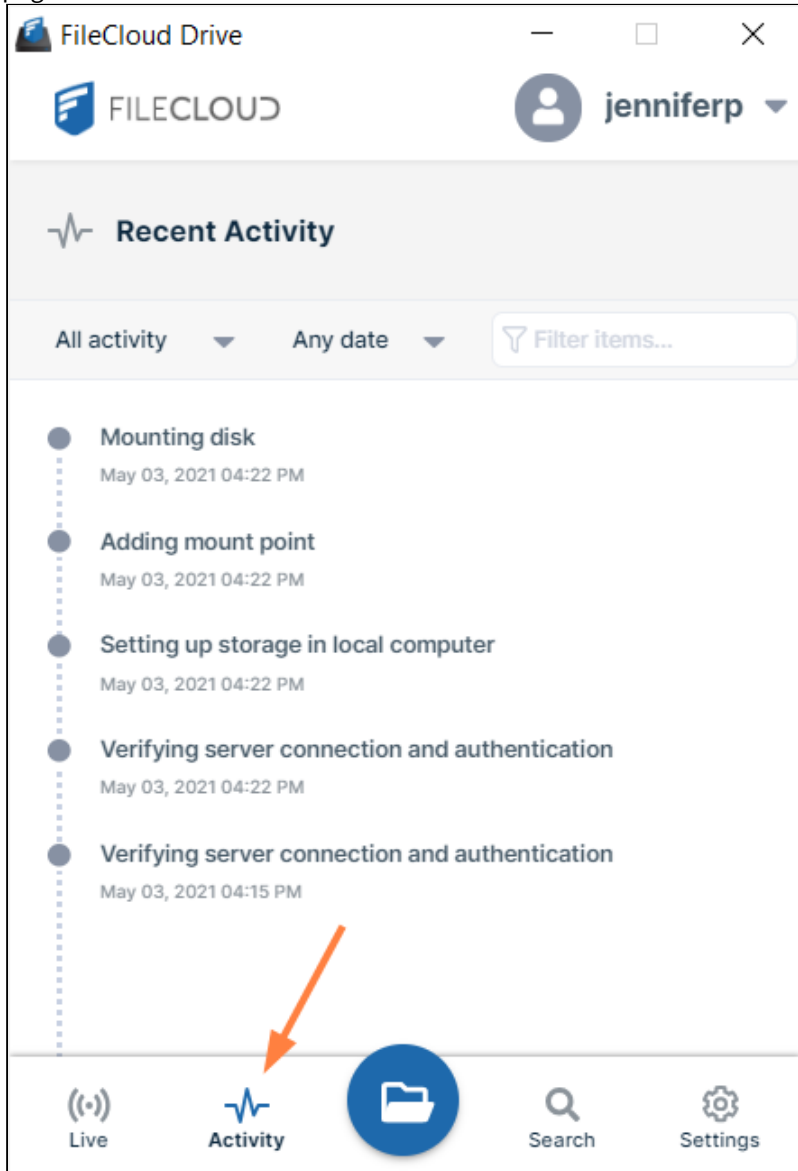
- Click the **Cancel** button to cancel the download.



To view recent activity in Drive:

1. [Log in to Drive](#), or in the system tray, right-click on the Drive icon, and choose **Dashboard**.  
If the dashboard does not display the **Recent Activity** screen, click the **Activity** button at the bottom of the

page.























## Sharing Files in Drive

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

Sharing files allows you to:

- Keep track of who you have shared a file with
- Add comments about the file
- Monitor file versions
- Control changes people make to the file or folder by setting a combination of permissions to read, view, modify, copy, or delete it

You can share a file in many different ways.

	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  Share	 Share Name  Expiration  Restrict Downloads  Notifications  Require Password		
Private	 Invite those without an account to create one	 View  Download  Share	 Share Name  Expiration  Notifications	 Add Groups of multiple user to share with	 With a FileCloud account

In this section:

## Sharing Files or Folders Publicly in Drive

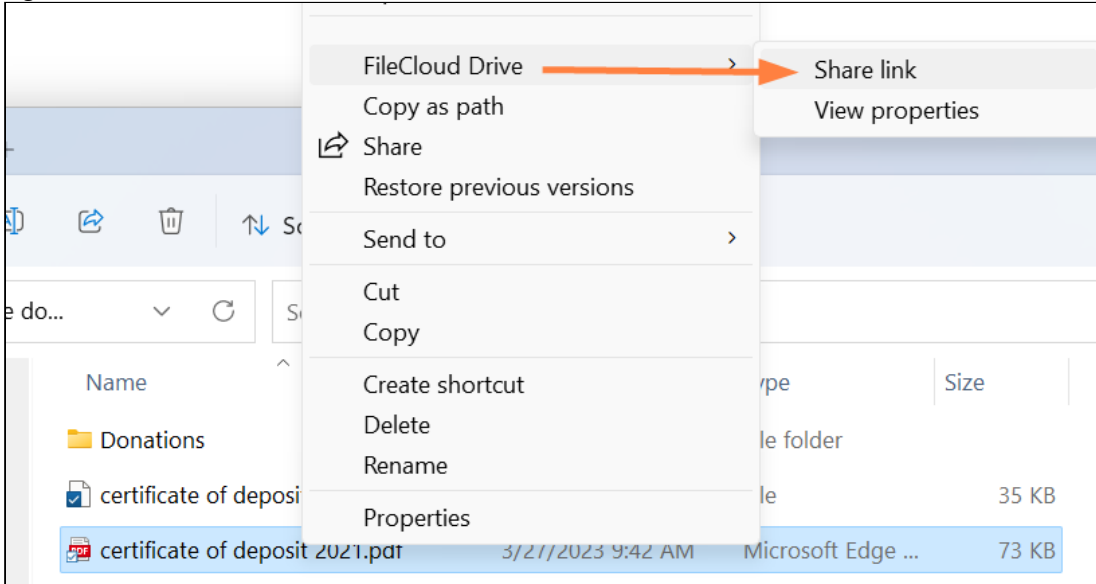
You can share a file or folder so that anyone can access the share even if they don't have a FileCloud account.

If you want more security but still want a large number of people to access the file, you can enable password protection.

Create a quick public share:

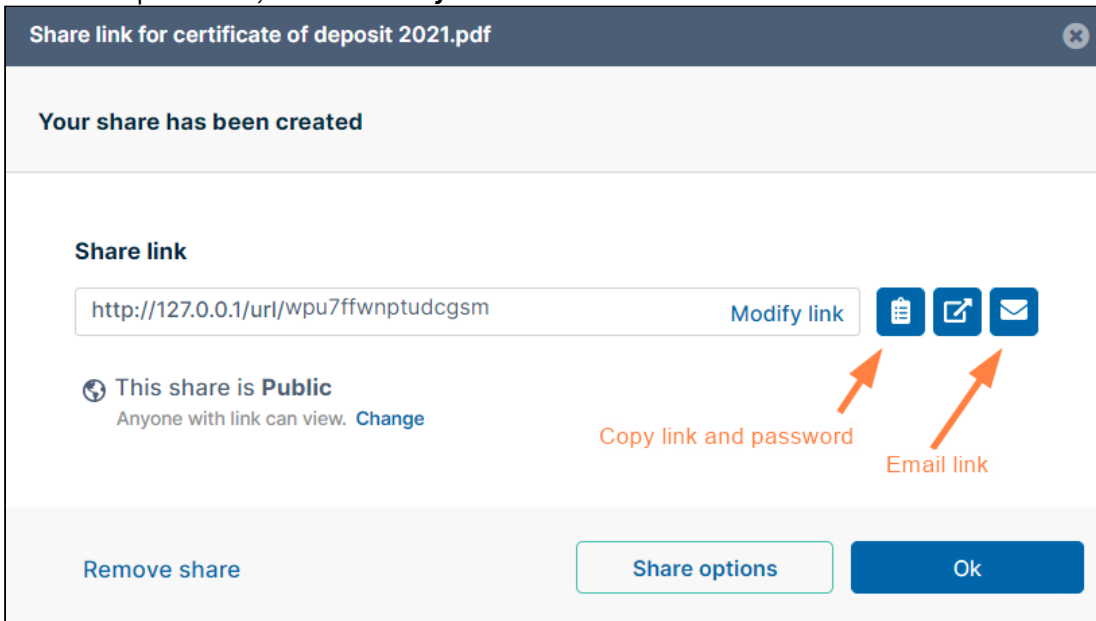
1. Open your drive folder and navigate to the file or folder that you want to share.

- Right-click on the file or folder and choose **Show More Option > FileCloud Drive >Share Link**.



The **Share Link** dialog box opens.

- To create a quick share, leave **Allow anyone with link** selected.



- Click the **Copy link** button to paste the link (and password if it exists) in a message and send it to users to give them access to the shared file.  
OR  
Click the **Email link** button to open an email message that includes the link. Fill in the addresses of recipients you want to send the email to.

Create a public file or folder share with options




- Open your Drive folder and navigate to the file or folder that you want to share.

2. Right-click on the file or folder and choose **Show More Option > FileCloud Drive >Share Link**.
3. The **Share Link** dialog box opens.
4. Click the **Share Options** button.

The **Share Link** dialog box expands to show additional options for the share.

Share link for certificate of deposit 2021.pdf

**Share link**

http://127.0.0.1/url/wpu7ffwnptudcgsm Modify link   

**Shared file**  
My Files > estate documents > certificate of deposit 2021.pdf

**Share options** Share history

Share Name: pIAdU4TArqiTDsgv Change

Expires: Never Expires


Max number of downloads: No Restrictions

Send email notifications: Yes

Sharing permissions:

Allow anyone with link

Allow anyone with link and password



Allow selected users and/or groups




Remove share Ok

5. You may change any of the settings under **Share Options**.  
The **Max number of downloads** setting is available for files but not for folders.
6. See [Public Share Options for Files](#) or [Share Options for Public and Private Folders](#) for help changing the settings.
7. If you click **Allow anyone with link and password**, the share is still public, but requires users to enter the password shown.  
You may change the password, and click **Save** to save it.
8. Click the **Copy link** button to paste the link (and password if it exists) in a message and send it to users to give them access to the shared file  
OR  
Click the **Email link** button to open an email message that includes the link (and password if included). Fill in the addresses of recipients you want to send the email to.

## Public folder permissions

When you share a folder publicly you can set which actions are permitted on the folder share.

**Share Link For ShareFolder**

**Share Link**  
 [Modify Link](#)   

**Shared Folder**  
 My Files > ShareFolder


**Share Options** | Share History

**Share Name:** 4jrQt0ScYAOKR0IR [Change](#)

**Expires:** Never

**Send Email Notifications:** Yes

**Sharing Permissions:**  Allow anyone with link

Allow  

- All View + Download
- All View + Download + Upload
- All View + Upload
- All View Only
- All Upload Only

**Remove Share** **OK**

*Actions to allow for public folder share*

For more information about the actions that you can select, see [Public Share Permissions for Folders](#).

For information about additional options and settings when sharing files and folders, see [Sharing Files and Folders](#)

## Sharing Files or Folders Privately in Drive

When you share a file or folder privately, you can either share it with existing FileCloud users or groups or invite a new user to create a FileCloud account and then access the share.

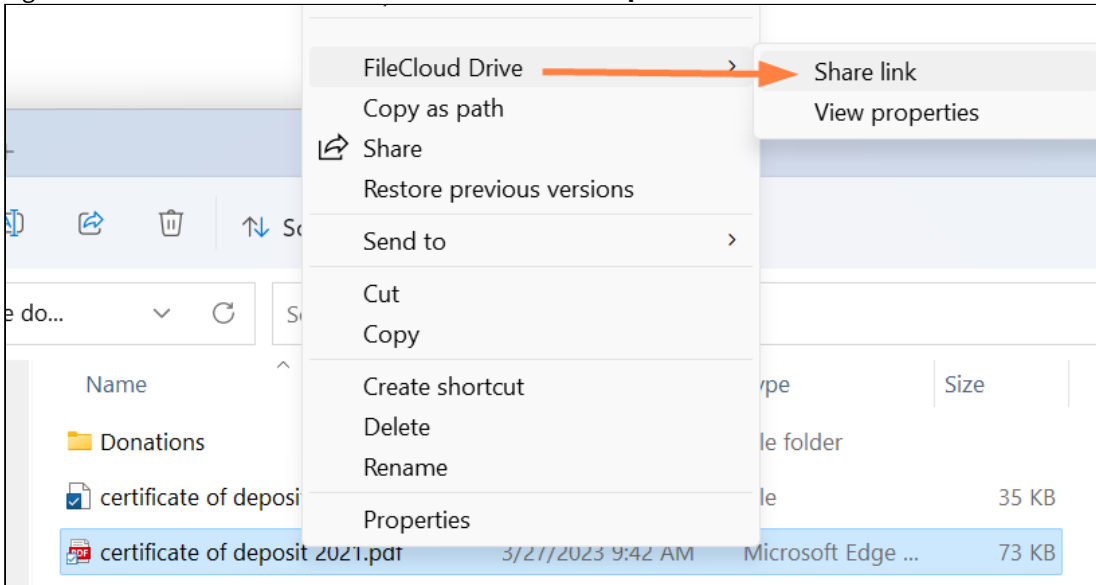
Sharing files or folders privately:

- Provides more security than sharing files or folders publicly.
- Is useful when you only have a small number of people you want to share with.
- Requires the user to log in with a FileCloud account to access the file or folder on the User Portal.

## To share files or folders privately with users or groups

### Share a file or folder privately with an existing or new user

1. Open your Drive folder and navigate to the file or folder that you want to share.
2. Right-click on the file or folder and choose **Show More Option > FileCloud Drive >Share Link**.



The **Share Link** dialog box opens.

3. Click **Share Options**.  
The **Share Link** dialog box expands to display **Share Options**.
4. Change any of the settings under **Share Options**.  
See [Private Share Options for Files](#) or [Share Options for Public and Private Folders](#) for help changing the settings.  
The **Max number of downloads setting** is not available for folders.
5. For **Sharing Permissions**, click **Allow selected users and/or groups**.  
**Users** and **Groups** tabs appear.

Share link for certificate of deposit 2021.pdf

Share link:  [Modify link](#)

**Shared file**  
My Files > estate documents > certificate of deposit 2021.pdf

**Share options** | Share history

Share Name: certificate of deposit 2021.pdf [Change](#)

Expires: Never Expires

Max number of downloads: No Restrictions

Send email notifications: Yes

Sharing permissions:

- Allow anyone with link
- Allow anyone with link and password
- Allow selected users and/or groups

**Users (0)** | **Groups (0)** [Invite users](#)

User	View	Download	Upload	Share	Sync	Delete	Manage
------	------	----------	--------	-------	------	--------	--------

[Remove share](#) [Ok](#)

6. Click **Invite Users**.  
An **Invite Users to this share** dialog box opens.
7. In the **Add email address or account** box, enter the email address or username of an existing user or a new user's email address.



The screenshot shows a dialog box titled "Invite Users to this share". At the top, there is a search bar labeled "Add email address or account" with the text "jessica" entered. Below the search bar, a dropdown menu displays a search result for "jm2344311@gmail.com" with the name "Jessica (jessicam)" and a profile icon. An "Add" button is positioned to the right of this result. Below the dropdown, there is a message "NO USER INVITED." At the bottom of the dialog, there is a checked checkbox for "Send Email", a "Cancel" button, and an "Add Users to this Share" button.

Adding an existing user.

The screenshot shows the same "Invite Users to this share" dialog box. The search bar now contains "liz@example.com". The dropdown menu shows a search result for "liz@example.com" with a plus sign icon and a profile icon. Below the name, there is a message: "A new account will be created with the email address and an email will be sent to liz@example.com with password to login." An "Invite" button is positioned to the right of this result. At the bottom of the dialog, there is a checked checkbox for "Send Email", a "Cancel" button, and an "Add Users to this Share" button.

Adding a new user: when you click **Invite**, an account is created for the user and the account password is sent to their email.

8. Click **Add** to add an existing user or **Invite** to invite a new user.
9. Add any number of share users. When you are done adding users, click **Add Users to this Share**. The users are added to the share and emails are sent to them with a link to the share. For information about sending and editing share emails to users, see [Sending an email notification for a private share](#), below. For any new user(s) you have added to the share, a FileCloud account is automatically created for them and an email with the account password is sent to them. The **Users** tab lists the users with checkboxes for various types of permissions next to them.

Share link for certificate of deposit 2021.pdf

my files > estate documents > certificate of deposit 2021.pdf

**Share options** Share history

Share Name: certificate of deposit 2021.pdf [Change](#)

Expires: Never Expires

Max number of downloads: No Restrictions

Send email notifications: Yes

Sharing permissions:

Allow anyone with link

Allow anyone with link and password

Allow selected users and/or groups

**Users (1)** Groups (0)

[+ Invite users](#)

User	View	Download	Upload	Share	Sync	Delete	Manage
jm2344311@gmail.com x	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Remove share](#) [Ok](#)

View is selected by default, and cannot be edited.

The permissions available for files and folders are different. See [Private Share Permissions for Files](#) or [Private Share Permissions for Folders](#) for more information.

10. Change any of the permissions.
11. Click **OK**.

**i** If you are not able to invite a new user to access your share, contact your administrator about allowing new user account creation. See [Sharing Files Privately with New Users](#).

### Sharing files or folders privately with a group

The procedure for sharing files or folders privately with a group is similar to sharing them privately with a user.

1. Follow steps 1 through 5, above, in [Sharing a file or folder privately with an existing or new user](#).

- In the **Share Links** dialog box, click the **Groups** tab.

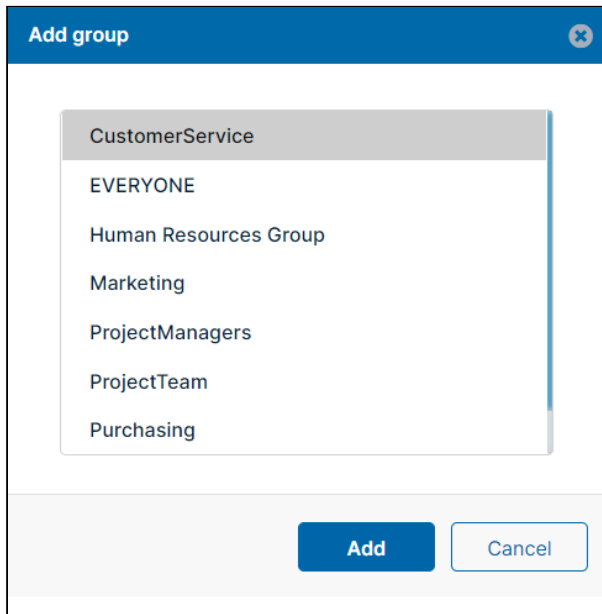
The screenshot shows a dialog box titled "Share link for certificate of deposit 2021.pdf". At the top, there is a "Share link" section with a text input field containing the URL "http://127.0.0.1/url/wpu7ffwnptudcgsm" and a "Modify link" button. Below this is the "Shared file" section, showing the path "My Files > estate documents > certificate of deposit 2021.pdf".

The main area of the dialog is divided into two tabs: "Share options" (selected) and "Share history". Under "Share options", there are several settings:

- Share Name:** "certificate of deposit 2021.pdf" with a "Change" link.
- Expires:** "Never Expires".
- Max number of downloads:** "No Restrictions".
- Send email notifications:** "Yes".
- Sharing permissions:** Three radio button options: "Allow anyone with link", "Allow anyone with link and password", and "Allow selected users and/or groups" (which is selected).

Below the permissions section, there are two tabs: "Users (1)" and "Groups (0)". An orange arrow points to a blue "Add group" button located to the right of the "Groups (0)" tab. At the bottom of the dialog, there is a "Remove share" button on the left and an "Ok" button on the right. A toolbar with icons for "View", "Download", "Upload", "Share", "Sync", "Delete", and "Manage" is also visible.

- Click **Add Group**.  
An **Add Group** dialog box opens:



4. Choose a group and click **Add**.

5. The **Groups** tab lists the group with checkboxes for various types of permissions.

Share link for certificate of deposit 2021.pdf

my files > estate documents > certificate of deposit 2021.pdf

Share options | Share history

Share Name: certificate of deposit 2021.pdf [Change](#)

Expires: Never Expires

Max number of downloads: No Restrictions

Send email notifications: Yes

Sharing permissions:

Allow anyone with link

Allow anyone with link and password

Allow selected users and/or groups

Users (1) | **Groups (1)** | [Add group](#)

Group	View	Download	Upload	Share	Sync	Delete	Manage
CustomerService x	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Remove share](#) | [Ok](#)

6. **View** is selected by default, and cannot be edited.
7. Change any of the permissions.
8. Add any number of additional groups.
9. Click **OK**.

### Sending an email notification for a private share

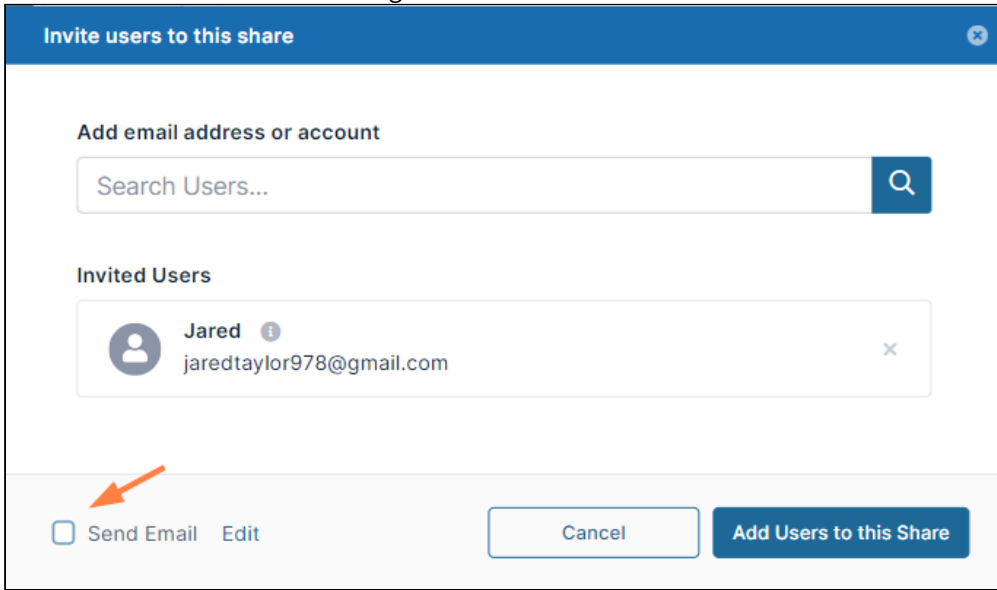
#### Sending an Email Notification for a Private Share

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.

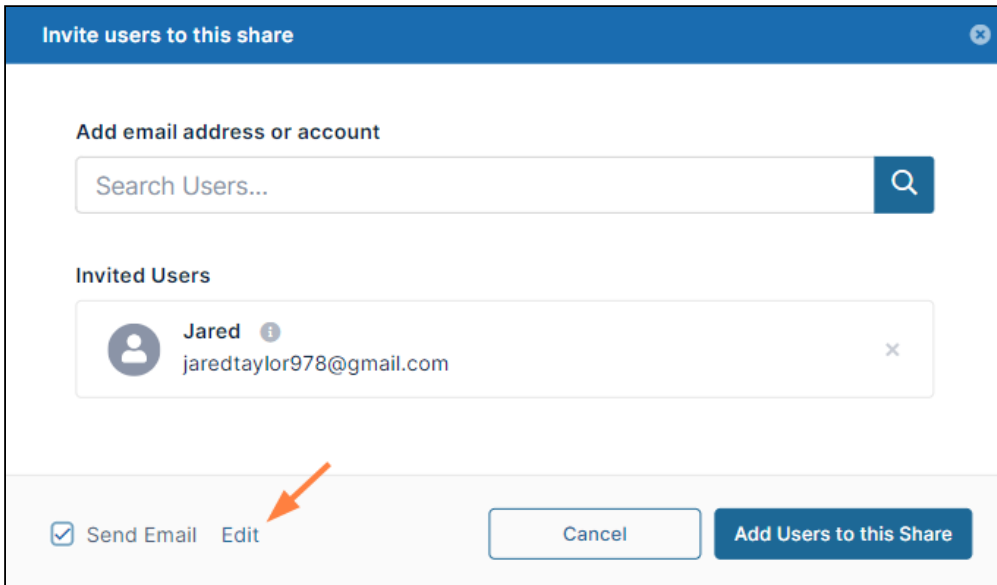
#### To not send the email to share members:

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.

The screenshot shows a 'Customize Email' dialog box. The title bar is blue and contains the text 'Customize Email' and a close button (X). Below the title bar is a light gray bar with a left arrow and the text 'Back'. The main content area is white and contains two sections: 'Subject' and 'Message'. The 'Subject' section has a text input field with the text 'Jennifer has shared files with you'. The 'Message' section has a larger text area with the text 'Jennifer has shared files with you'. At the bottom of the dialog, there is a light gray bar containing an 'Advanced' link, a 'Cancel' button, and an 'OK' button.

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.

**Customize Email**

← Back

**Existing Users**

**To**

Enter comma separated emails

jaredtaylor978@gmail.com

**Subject**

Jennifer has shared files with you

Send a copy to myself

**Message**

**B I U** | | **H** |

FILECLOUD

Jennifer has shared files with you.

Basic Cancel OK

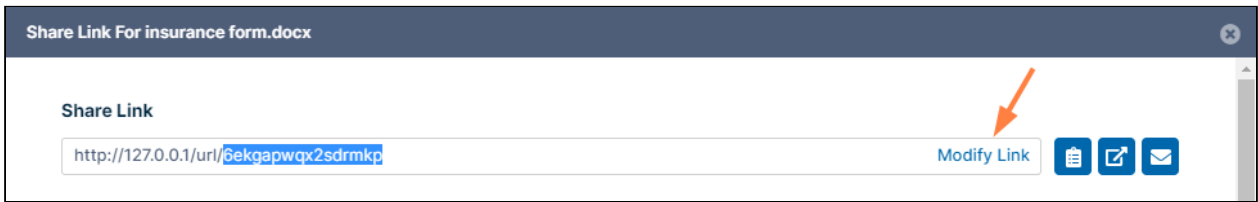
4. Make any changes, and click **OK**.

## Editing a Share Link in Drive

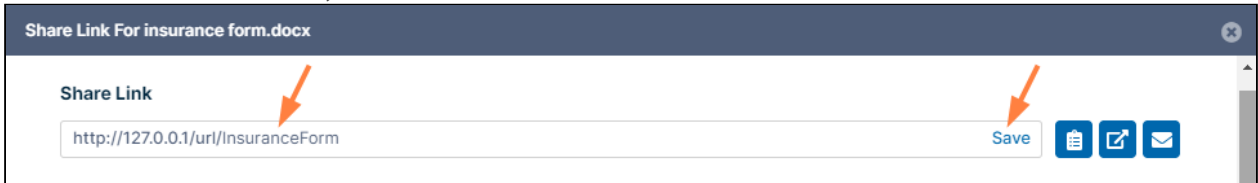
From the **Share Link** dialog box, you can edit the name of a link to be more descriptive.

1. In the **Share Link** dialog box, click **Modify Link**.  
The portion of the link that you can change becomes highlighted.





2. Enter a new name for the link, and click **Save**.

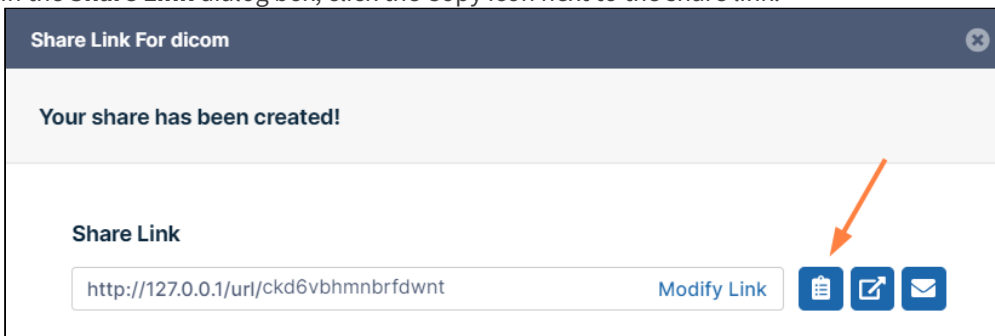


The link name is changed.

## Copying a Share Link in Drive

In the **Share Link** dialog box, you can copy a link and then post it in a site or send it to a user.

- In the **Share Link** dialog box, click the Copy icon next to the share link.

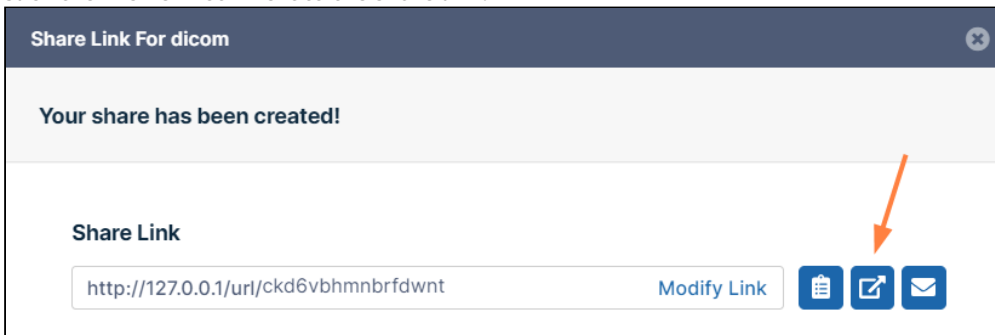


The link is now copied and you may paste it into website or message.

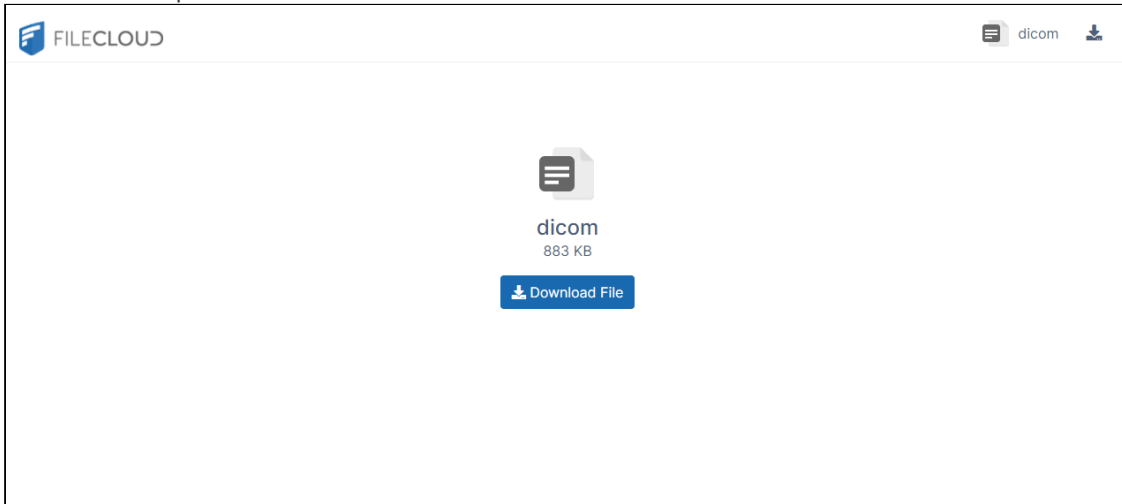
## Previewing a Share in Drive

From the **Share Link** dialog box, you can view a share as it appears to recipients when they click the share link.

- Click the Preview icon next to the share link.



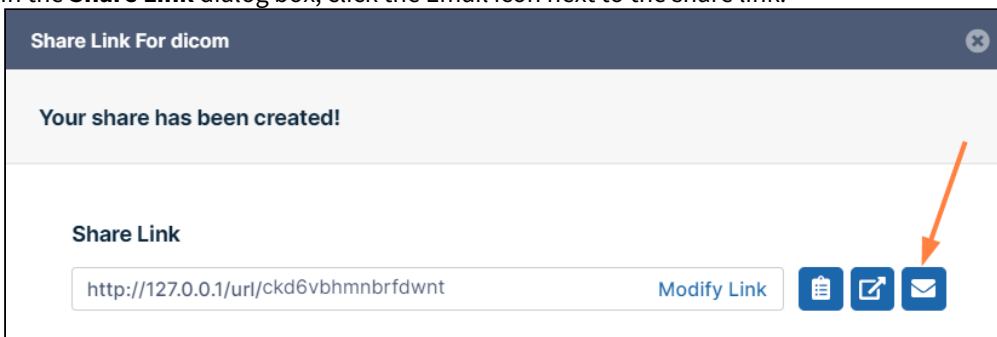
The share link opens in the browser as it would for a user who clicked the link:



## Emailing a Share Link in Drive

From the **Share Link** dialog box, you can email a link to users to give them initial access to your share or to resend a private link to share recipients.

1. In the **Share Link** dialog box, click the Email icon next to the share link.



A **Send Share Link via Email** dialog box opens.

2. Enter a To address and a message.

**Send Share Link via Email For dicom**

**Your Name**

**Your Email**

**To Email**

**Share Link**

**Message**

3. Click **Send Email**.

## Sending a link from a Team Folder or Shared With Me

You can use the Direct Link option to copy a link to an item and send it to others who already have share access to it. That means they must already have permission to access the item.

The Direct Link option works only with items in the following folders:

- Shared with me
- Team Folders

After clicking the share link, the user must log in to FileCloud Server, and is then taken directly to the selected folder or file.

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.

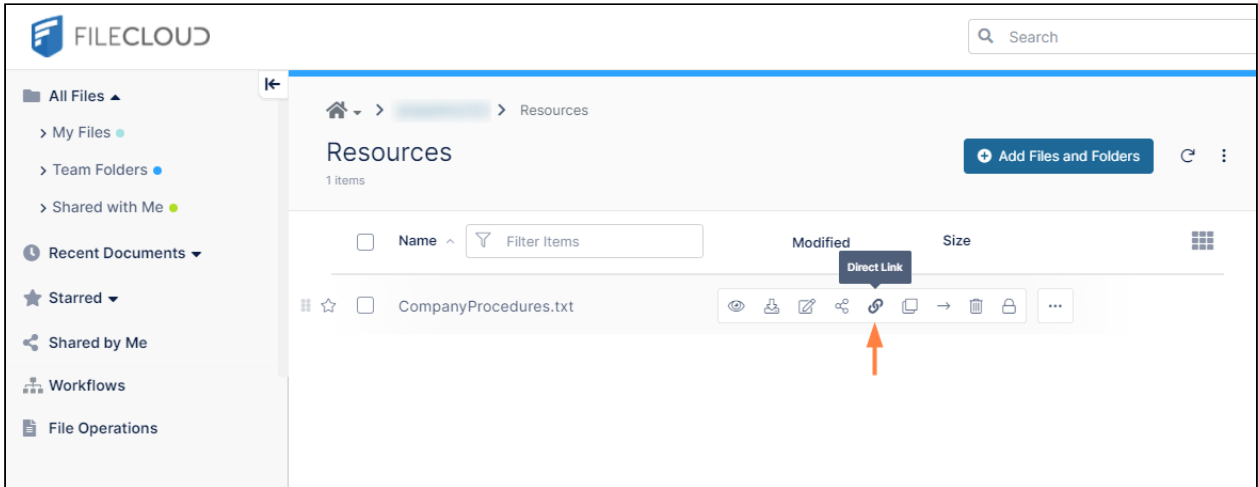
When users click the link, they are prompted to log in and then taken directly to the selected folder or file.

**Limitation**

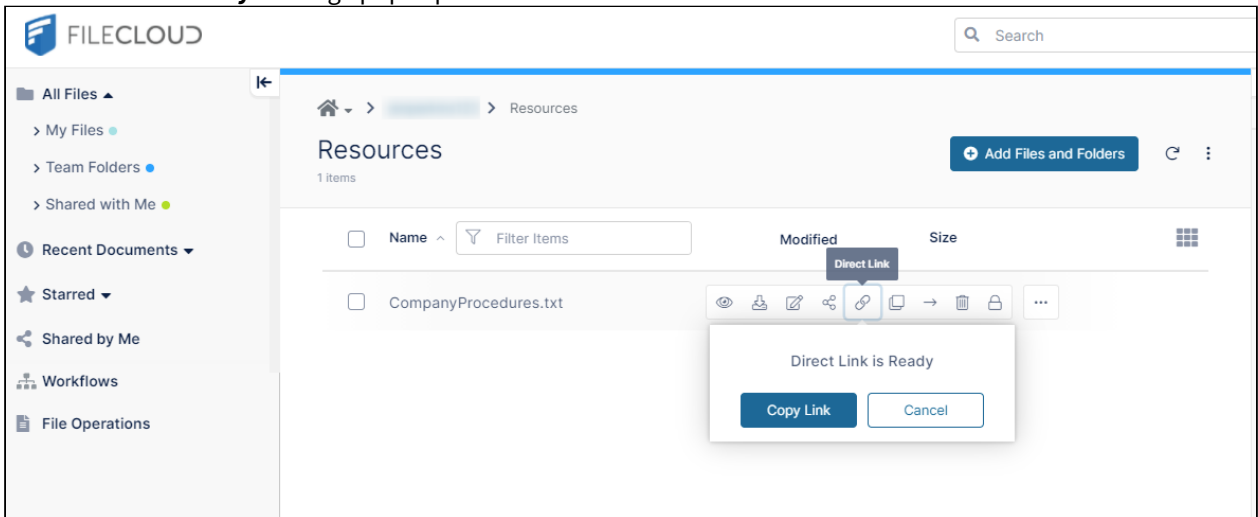
For Team Folders, direct links to files in sub-folders that are created by users who have access to the parent folder and sub-folder will not work for users who only have access to the sub-folder, because the links will include the parent folder path, which does not exist in the file structure of those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

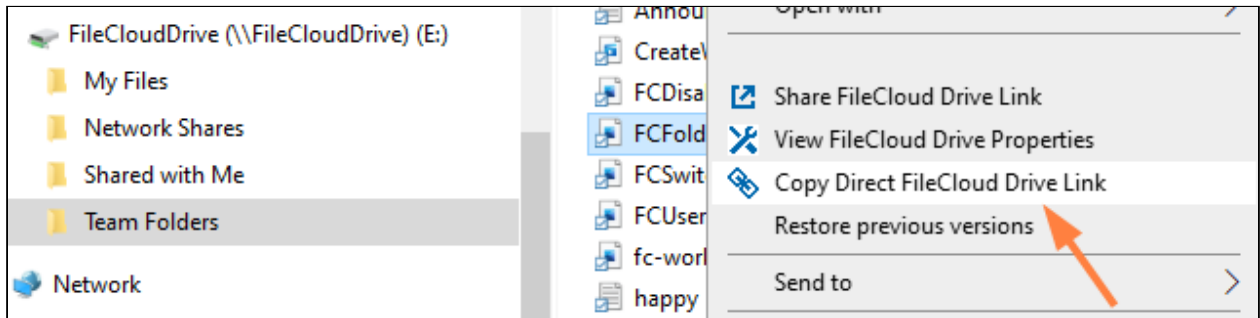


3. Click **Copy Link**.
4. Paste the link into an email or a file, and send it to users.

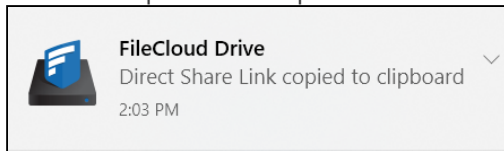
**To share a file by creating a direct link:**

1. Launch FileCloud Drive by right-clicking on the icon in your system tray and choosing **Open Folder**. A File Explorer window opens, displaying the contents of your mapped drive.

2. Open a Team Folder or Shared with Me folder, right-click the item you want to share, and then select **Copy Direct FileCloud Drive Link**.



The link is copied to the clipboard and if alerts are enabled, the following alert appears:



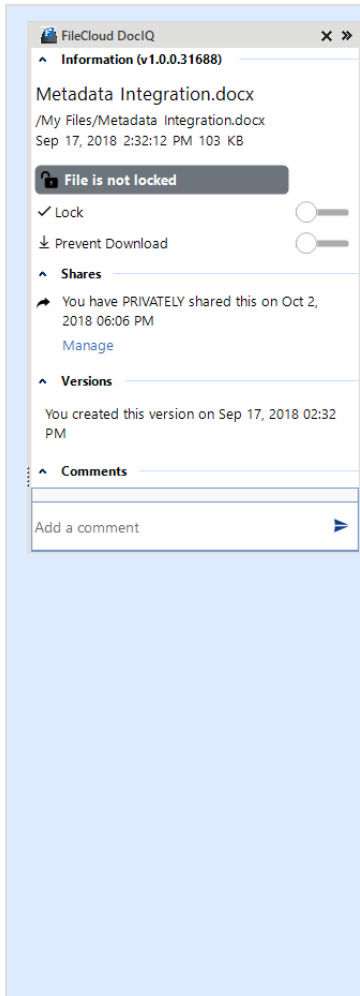
3. Paste the link and send it to a user.

## Using DocIQ with Microsoft Applications

**⚠ New FileCloud Drive users:** DocIQ has been replaced with FileCloud for Office. Please see the [Using FileCloud for Office with Drive](#) documentation.

**Current FileCloud Drive users (DocIQ users):** FileCloud no longer supports DocIQ. Later this year, DocIQ will be deprecated. Although you can continue to use DocIQ with the current release, we recommend using FileCloud for Office, which can be downloaded from the Office add-ins store. Now, when you upgrade FileCloud Drive, you are given the choice of using FileCloud for Office or continuing to use DocIQ. If you choose to use FileCloud for Office, please see the [Using FileCloud for Office with Drive](#) documentation.

DocIQ is a Microsoft Office add-in for FileCloud Sync and FileCloud Drive clients.



DocIQ works with the following Microsoft Office applications:

- Word
- Excel
- PowerPoint

#### What does DocIQ do?

DocIQ works with Office documents to help you manage shared files.

DocIQ gives you the ability to:

- manage file locking
- collaborate with your colleagues through comments
- see how shared files are being managed

#### How do I use DocIQ?

1. Open an Office application such as Word, Excel or PowerPoint.
2. Inside the Office application, you open a file saved to a FileCloud Sync or FileCloud Drive folder.
3. DocIQ displays as a task panel inside the Office application with the following information:
  - File details
  - Lock status
  - File sharing details
  - Comments attached to the file

#### How do I install and work with DocIQ?

1. [Install DocIQ.](#)
2. [Configure DocIQ.](#)
3. [Work with file locking.](#)
4. [Troubleshoot Doc IQ issues.](#)

## Install DocIQ

**⚠ For users who begin using FileCloud in version 23.1 or users who have not used DocIQ previously:** You will not see an option to install DocIQ when you install or upgrade FileCloud Drive. Instead, you will be given the option of installing [FileCloud for Office](#).

**Current FileCloud Drive users (DocIQ users):** DocIQ is no longer supported. Later this year, DocIQ will be fully deprecated. Although you can continue to use DocIQ currently, we recommend using FileCloud for Office, which can be downloaded from the Office add-ins store. Now, when you upgrade FileCloud Drive, you are given the choice of using FileCloud for Office or continuing to use DocIQ. If you choose to use FileCloud for Office, please see the [Using FileCloud for Office with Drive](#) documentation.

DocIQ allows you to easily manage FileCloud options for a file directly in Microsoft Office applications.

[➔ Install FileCloud Drive](#)

## FAQ's

### **Do I need to do anything before installing it?**

It's easy! Just make sure you have this:



Microsoft Office - Version 2007 or later



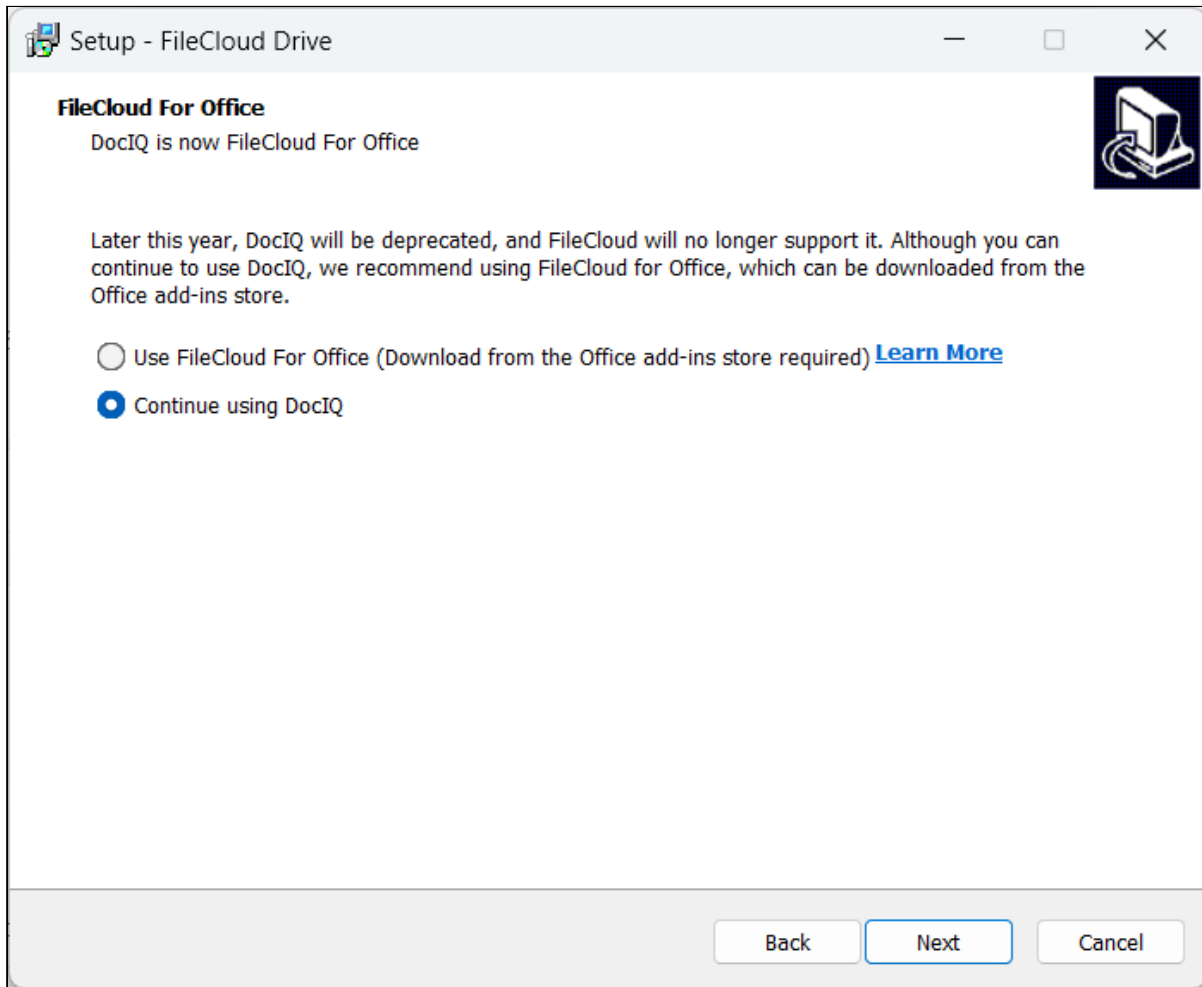
for Windows



DocIQ does not support Microsoft Office for macOS. If you are a macOS user, install [FileCloud for Office \(FFO\)](#), which replaces DocIQ.

### **How do I continue to use it?**

You may continue to use DocIQ when you update the FileCloud Drive Client.



Simply choose this option when you upgrade FileCloud Drive:

➔ [Install/Upgrade FileCloud Drive](#)

### Where is DocIQ installed on my computer?

DocIQ is installed in the following folder:

```
program files(x86)/DocIQ
```

### Configure DocIQ



DocIQ gets all configuration information from FileCloud Sync and Drive.

For example, when a file is opened from Drive, DocIQ will know which FileCloud account you are using.

- This allows DocIQ to show you information about the file that is uploaded to the FileCloud Server site in the Office application.

There are a few properties that can be configured in Sync and Drive for DocIQ:



Option	Description	How to Configure
<p>Enable or Disable DocIQ Integration</p>	<p>This option removes the DocIQ panel that is shown in a Microsoft Office application after DocIQ is installed and enabled.</p> <p>This option is useful if you only need to disable DocIQ for a short time while troubleshooting computer issues.</p> <p>This option does not permanently remove DocIQ. To remove DocIQ, you have the following options:</p> <ul style="list-style-type: none"> <li>• uninstall Sync or Drive</li> <li>• use the Windows Programs Control Panel to remove DocIQ</li> </ul>	<ol style="list-style-type: none"> <li>1. In the system tray, right-click on the FileCloud Drive icon, and then select <b>Dashboard</b>.</li> <li>2. Click  . Settings open.</li> <li>3. To disable DocIQ, select <b>Disable DocIQ Office integration</b>.</li> <li>4. To enable DocIQ, select <b>Disable DocIQ Office integration</b> again.</li> </ol>
<p>Mute all notifications in DocIQ</p>	<p>When other users access a file you have open, DocIQ displays notifications in the DocIQ panel.</p> <p>Select this option when you do not want to see notifications.</p>	<ol style="list-style-type: none"> <li>1. In the system tray, right-click on the FileCloud Drive icon, and then select <b>Dashboard</b>.</li> <li>2. Click  . Settings open.</li> <li>3. To mute notifications for DocIQ (as well as all other notifications for FileCloud Drive) in <b>Notifications</b>, select <b>Mute all Notifications</b>.</li> <li>4. To turn back on notifications for DocIQ (as well as all other notifications for FileCloud Drive) in <b>Notifications</b>, select <b>Enable all Notifications</b>.</li> </ol>

## Work with DocIQ File Locking

You can use file locking to:

- See if you have the file locked for editing
- Easily turn locking on and off
- Prevent or enable downloads of this file

Locking is critical for shared files, since another user can also open the file and make changes.

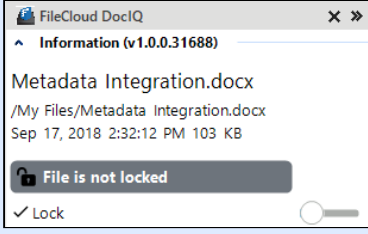
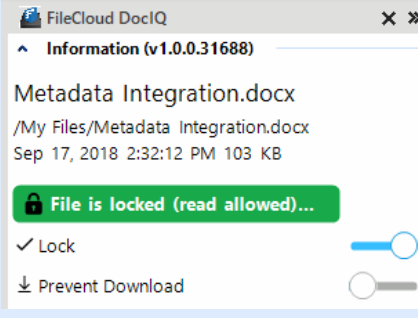
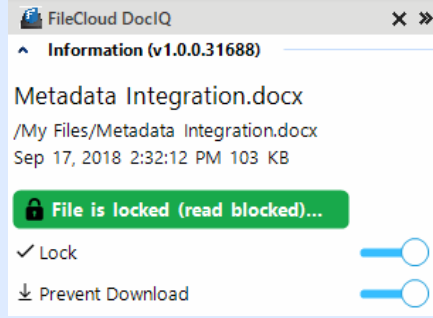
- When one user opens a file, DocIQ automatically locks the file for editing.
- The lock is shown right in the Office application you are using to edit the file.

FAQ's

## How do I know the status of a lock?

To see the lock status:

1. In a Microsoft Office application, open a file saved to your Drive folder.
2. In the DocIQ panel, under the file name, location, and date information, you can see the lock status.

		
<p>File is not locked when:</p> <ul style="list-style-type: none"> <li>• Lock is OFF</li> </ul>	<p>File is locked (read allowed) when:</p> <ul style="list-style-type: none"> <li>• Lock is ON</li> <li>• Prevent Download is OFF</li> </ul>	<p>File is locked (read blocked) when:</p> <ul style="list-style-type: none"> <li>• Lock is ON</li> <li>• Prevent Download is ON</li> </ul>

The following table describes what each lock status means and how it impacts what you can do with the file and others you have shared it with.

Lock Status	Access by lock owner	Access by others
File is locked (read allowed)	Read and Modification allowed	Only read is allowed, no modification is allowed
File is locked (read blocked)	Read and Modification allowed	No Read and Modification is allowed
File is not locked	Read and Modification allowed	Read and Modification allowed

## When does the lock status change?

In the following scenario:

- When a supported file from Sync or Drive is opened
- When automatic lock on an open file is enabled

DocIQ will automatically attempt to lock the file, with read allowed status.

For a file with a Read Blocked status:

If USER1 has locked (read blocked) the file:

- FileCloud Sync will not download the file for USER2

However, if USER2 has already downloaded the file, then:

- FileCloud Sync will allow DocIQ to open the file
- FileCloud Drive will not allow the file to be opened by USER2, unless Drive has already cached the file

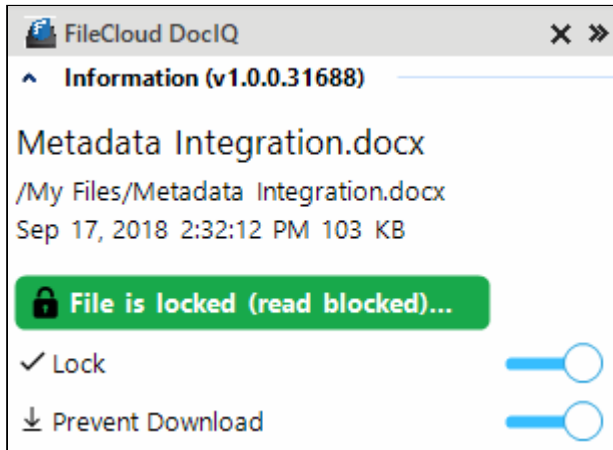
You can use the following table to understand the status of lock:

Action	Doc IQ Lock Enabled	Prevent Download	Lock Status Before Open	Lock Status After Open	Lock Status After close
An unlocked file is opened by USER1			File is not locked	File is locked (read allowed) by USER1	File is not locked
An unlocked file is opened by USER1			File is not locked	File is not locked	File is not locked
A file is locked by USER1 before it is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (Read Allowed) by USER1	File is locked
A file is locked by USER1 before it is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (Read Allowed) by USER1	File is locked
A file is locked by USER1 before it is opened by USER1			File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1	File is locked
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1

💡 Note that you cannot enable *Prevent Download* unless DocIQ *Lock* is also enabled.

### How can I prevent another user from downloading a file I am working on?

When you lock a file, you can block other users from reading the file by enabling Prevent download.



💡 Note that you cannot enable *Prevent Download* unless DocIQ *Lock* is also enabled.

If another user, USER2, attempts to download the file, USER2 will see the following conditions:

- The file cannot be downloaded from the FileCloud User Portal
- FileCloud Sync will not download the file that is locked and read-blocked.
- FileCloud Drive will not open the file that is locked and read-blocked.
- DocIQ will open the file from a Sync path when file is already available in the Sync client (previously downloaded).
- DocIQ will open the file from a Drive path when the Drive client allows a file to be opened.

### Manual file locking in DocIQ

Please note that whether or not manual file locks are released when a file is closed depends on the setting for automatic locking:

- Manual locks are released when closing a file and Drive Automatic Locking is not active.
- Manual locks are not released when closing a file and Drive Automatic Locking is active.

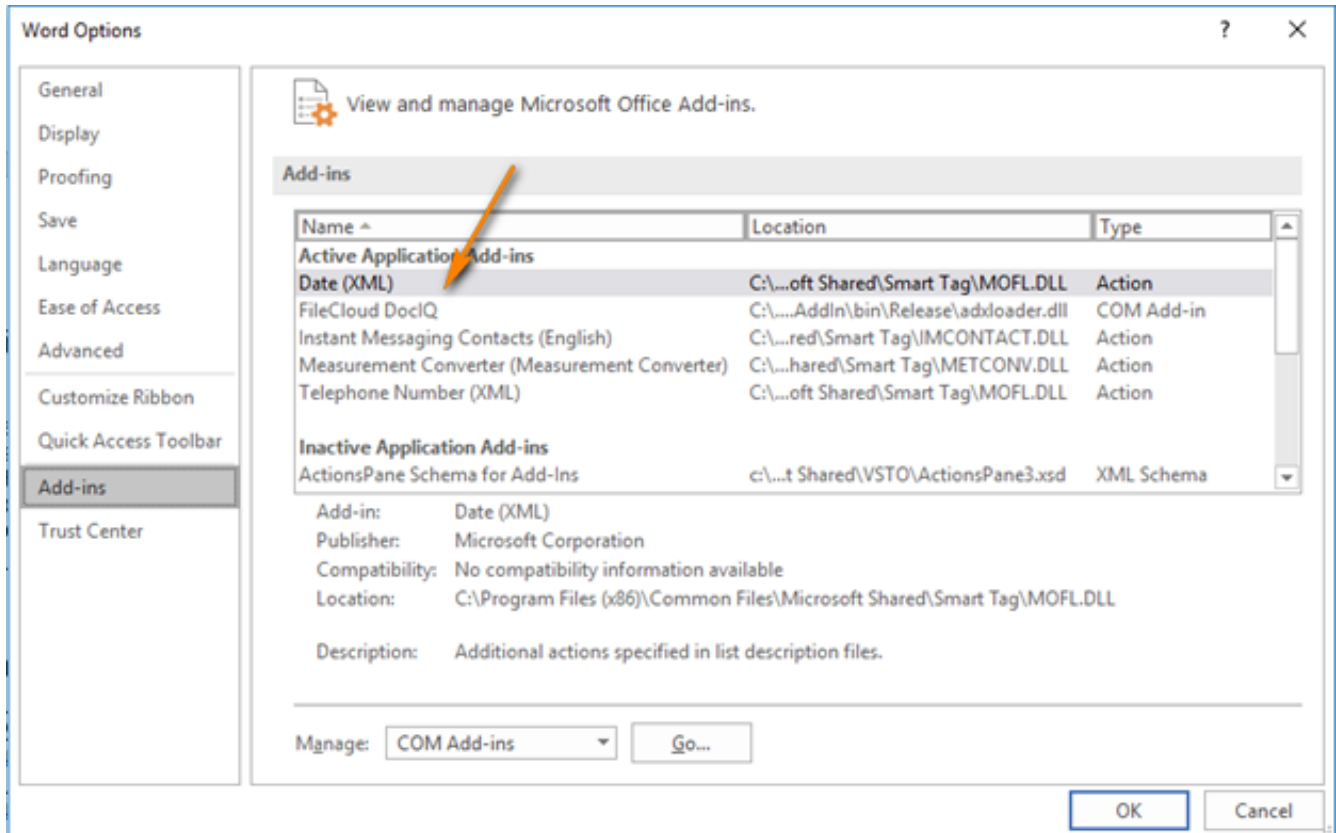
### Troubleshoot, Disable, and Uninstall DocIQ

DocIQ is very straightforward to install, configure, and use. If you encounter issues, try using these troubleshooting tips.

#### DocIQ is not displayed in your Office app

Check if DocIQ office integration is enabled in Sync/Drive Path:

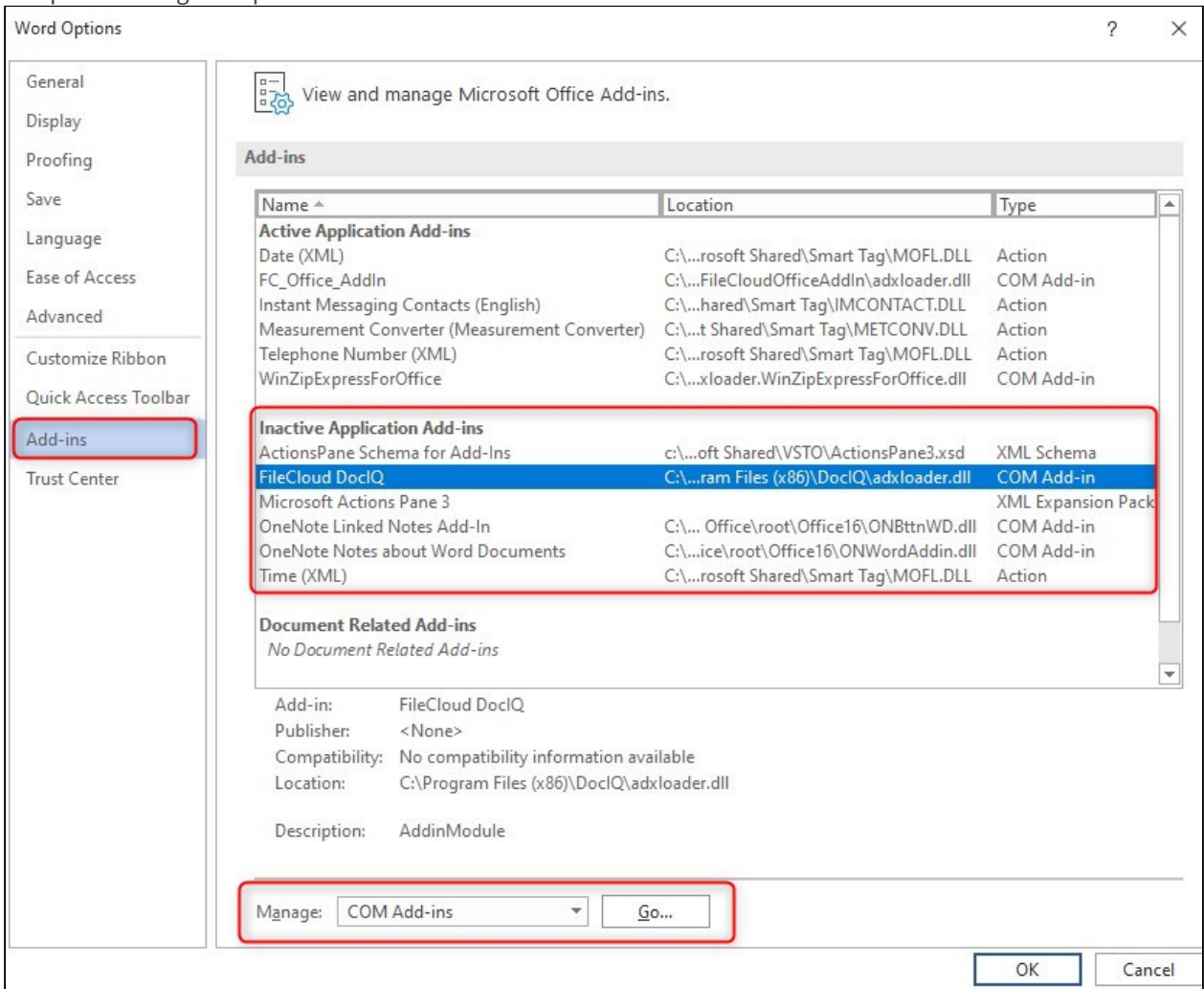
1. Check if the file you opened is in a Sync or Drive folder
2. Restart Drive or Sync.
3. In an Office application, such as Word, open File Options
  - a. From the menu, select File > More > Options.
  - a. In Add-ins, under Active Application Add-ins verify that FileCloud DocIQ is listed.



### DocIQ is present but does not appear when I open an Office application

This occurs if the Office application is storing DocIQ as an inactive add-on. To fix this problem, activate the DocIQ add-on:

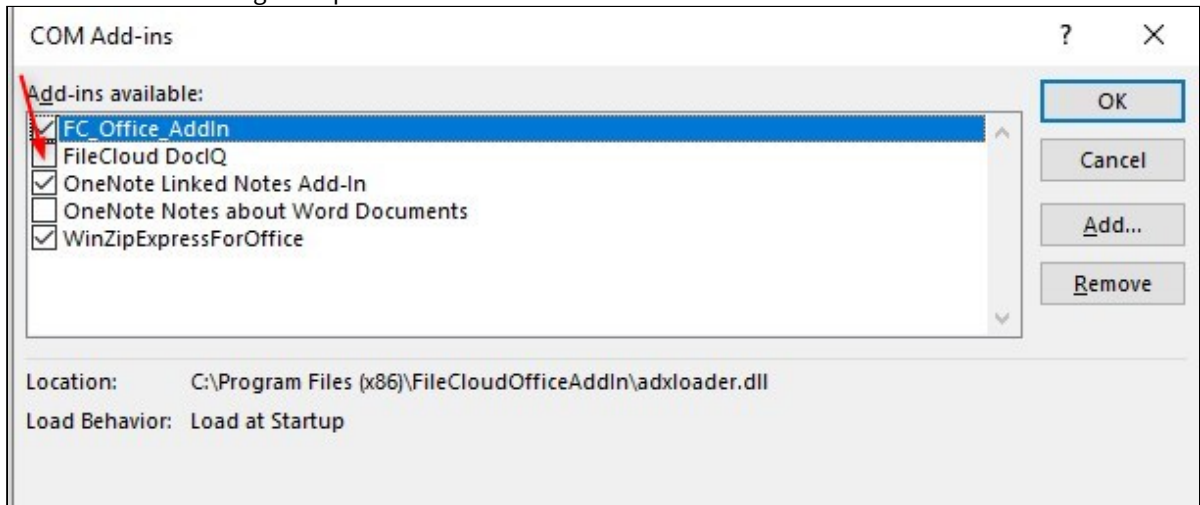
1. In the Office application, with the file open, select **File**, then **Options**.  
An Options dialog box opens:



2. In the navigation bar, click **Add-ins**.
3. Look for **FileCloud DocIQ** under Inactive Application Add-ins.
4. If it is listed there, make sure the **Manage** drop-down list at the bottom of the dialog box displays **COM Add-ins**.

5. Click **Go**.

The COM Add-ins dialog box opens.




6. Check FileCloud DocIQ.
7. Click **OK**.  
The Office document should now display DocIQ.

To temporarily disable DocIQ to troubleshoot other computer issues, see [Configure DocIQ](#).


If you need to, you can uninstall DocIQ in the following ways:

#### From the Windows Control Panel

1. Next to the Start button (  ), in the search box, type *Control Panel*.
2. From the results, select *Control Panel*.
3. Select *Programs*.
4. Select *Programs and Features*, and then select *DocIQ*.
5. At the top of the list, next to *Organize*, click *Uninstall*.

#### Uninstall the Sync application

DocIQ will be uninstalled when Sync application is uninstalled.

1. Next to the Start button (  ), in the search box, type *Control Panel*.
2. From the results, select *Control Panel*.
3. Select *Programs*.
4. Select *Programs and Features*, and then select *FileCloudSync*.
5. At the top of the list, next to *Organize*, click *Uninstall*.


#### Uninstall the Drive application

DocIQ will be uninstalled when Drive application is uninstalled.

1. Next to the Start button (  ), in the search box, type *Control Panel*.
2. From the results, select *Control Panel*.
3. Select *Programs*.

4. Select *Programs and Features*, and then select *FileCloudDrive*.
5. At the top of the list, next to *Organize*, click *Uninstall*.

## Using FileCloud for Office with Drive

 FileCloud for Office is an MS Office add-in for Word, Excel, and PowerPoint which can be used in both Windows and macOS with FileCloud Sync, FileCloud Drive, and FileCloud Desktop. It is available in FileCloud beginning with version 23.1.  
For instructions on how to install FileCloud for Office, see [Using FileCloud for Office](#).  
If you have been using FileCloud Drive with DocIQ, see the instructions [for previous users of DocIQ](#) at the bottom of this page.

### Before using FileCloud for Office with Drive

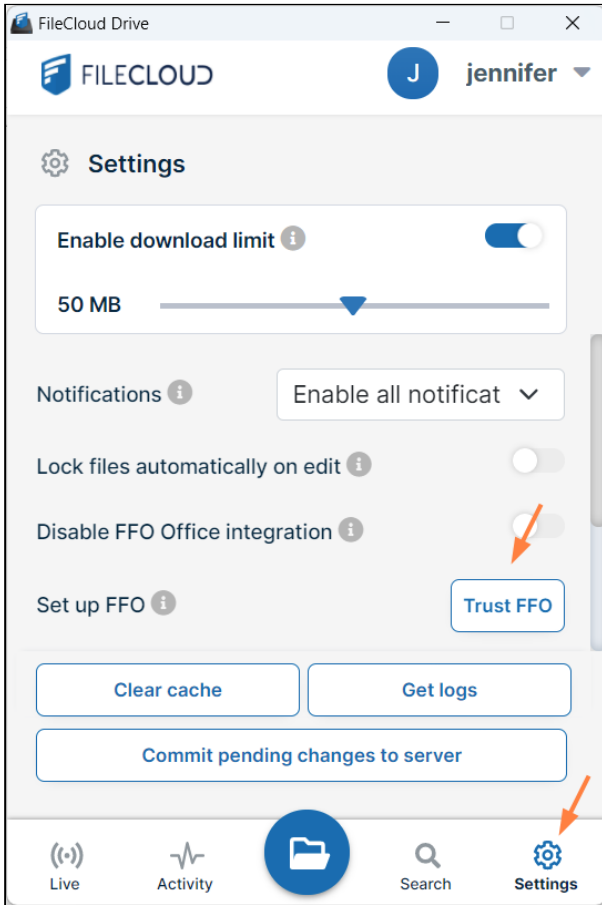
The first time you install Drive or upgrade Drive to use FileCloud for Office you must confirm that you trust FileCloud for Office.

To enable FileCloud for Office:

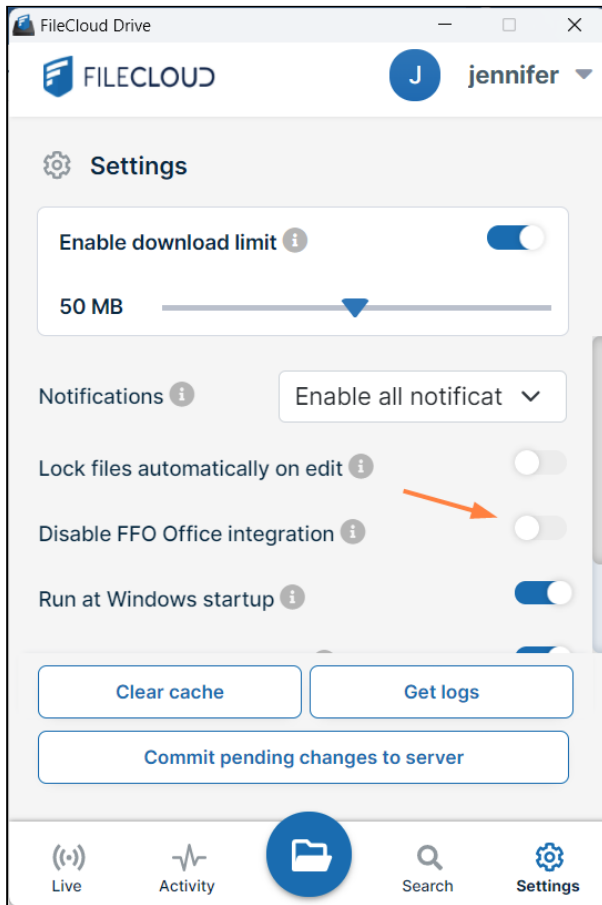
1. After you log in to FileCloud Drive, click the **Settings** tab.



2. Click the **Trust FFO** button.



The **Trust FFO** button disappears, and **Disable FFO Integration** remains automatically turned off:



FileCloud for Office is now enabled in Drive, but to use it in Office files, you must [attach the add-in](#) to to each type of Office file (Word, Excel, and PowerPoint) in your FileCloud Drive directory.

## Working with FileCloud for Office in Drive

The FileCloud for Office task panel displays information about a file and enables you to:

- Lock or unlock a file.
- Prevent or allow download of a file while locked.
- Share a file.
- Manage file versions, and view file details and metadata.

Lock or unlock a file

### Locking and unlocking files

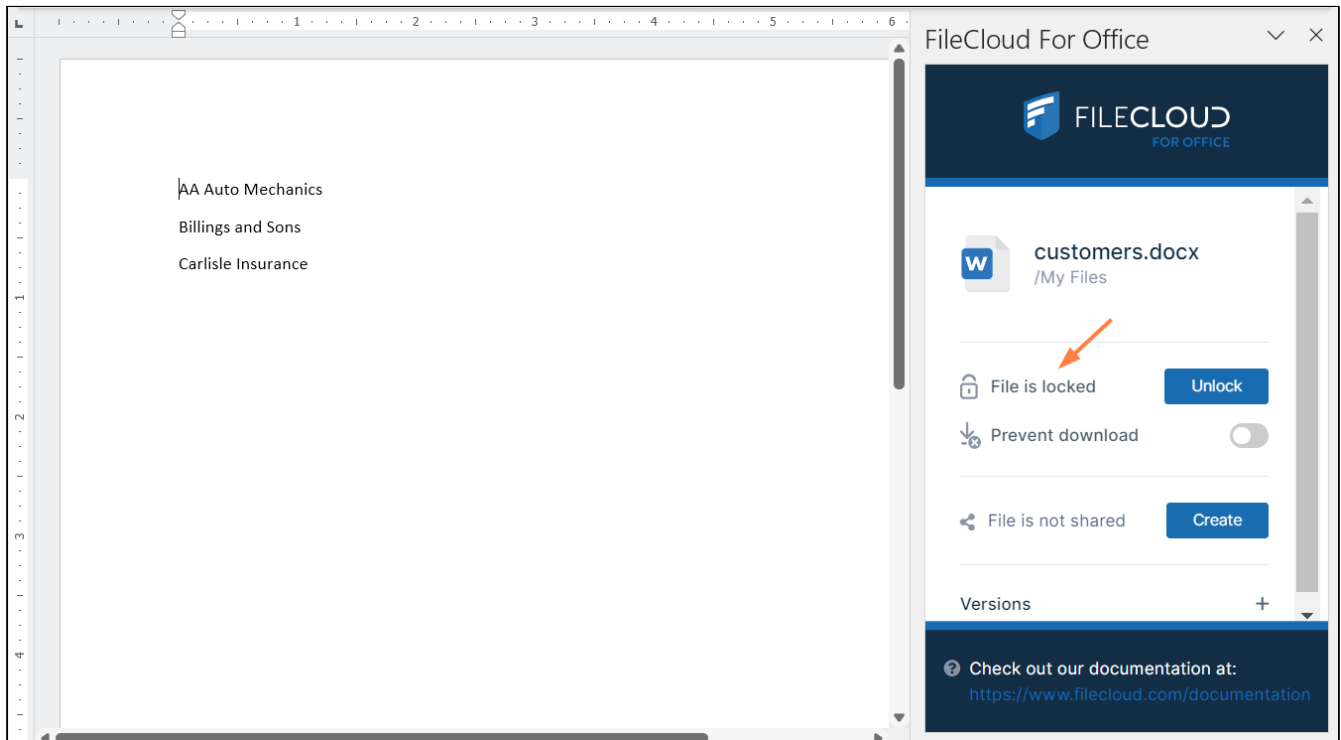
You can use the file locking function in FileCloud for Office to:

- See if you have a file locked for editing
- Turn a file lock on or off
- Prevent or enable downloads of a locked file

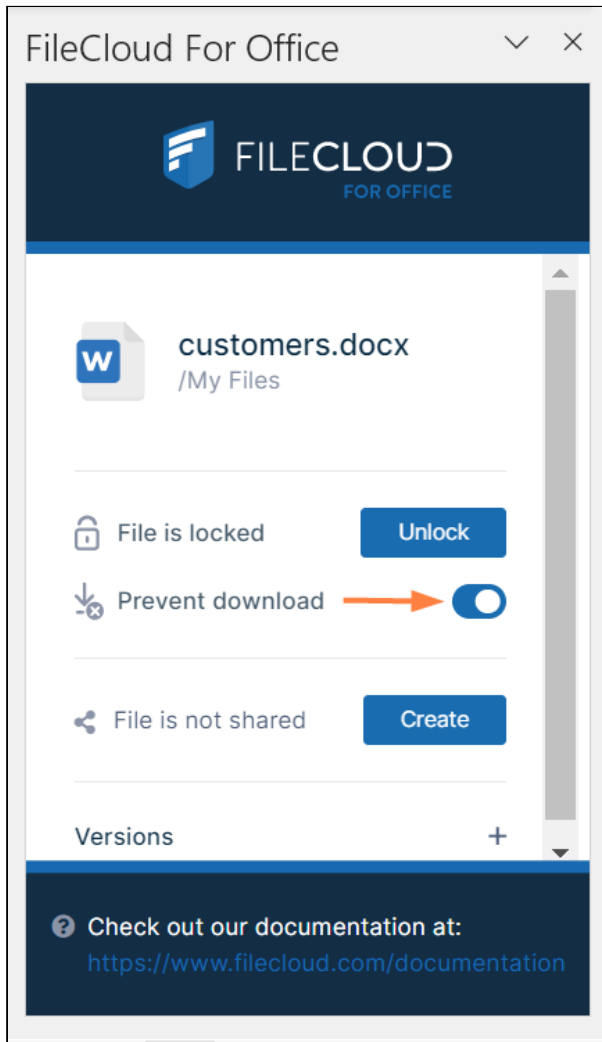
If a shared file is not locked when you open it for edit, another user can also open the file and make changes. To avoid this, by default, FileCloud for Office automatically locks files for editing when they are opened.

When you open an Office file in your client directory, the FileCloud for Office panel shows **File is locked**, and by default,

users are allowed to download or read the file (**Prevent download** is disabled).

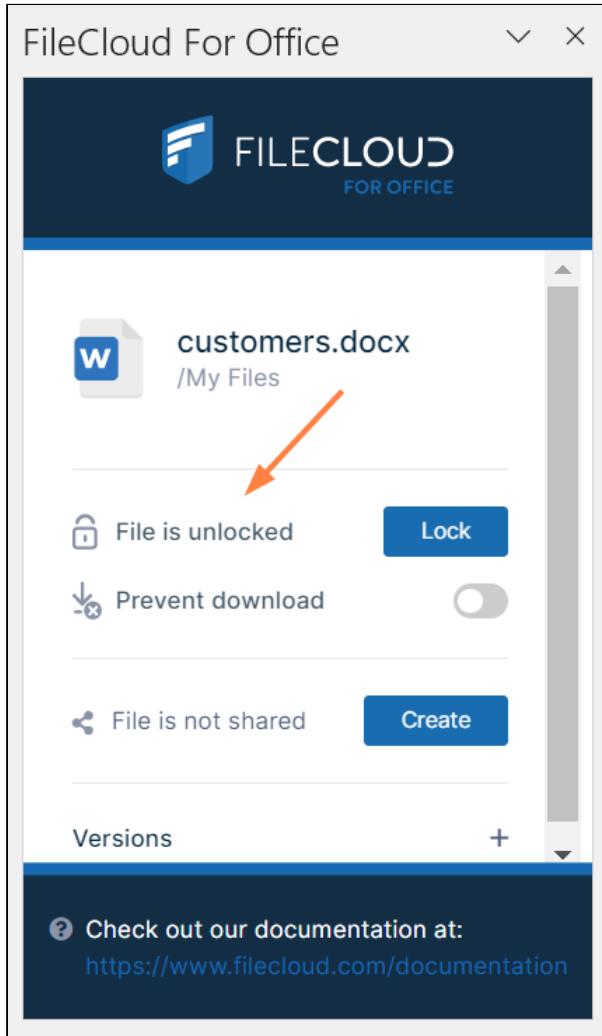


- To prevent other users from downloading or reading the file while it is locked, click the **Prevent download** slider.



- To unlock the file while you have it opened for edit, click **Unlock**. Now other users can modify as well as view and download the file.

**Note:** Prevent download cannot be enabled when the file is unlocked.



The following table describes what each lock status means and how it impacts what you and others you have shared the file with can do with the file.

Lock Status	Access by lock owner	Access by others
File is locked (download allowed)	Read and modification allowed	Only read is allowed, no modification is allowed
File is locked (download prevented)	Read and modification allowed	Neither read nor modification is allowed
File is not locked	Read and modification allowed	Read and modification allowed

**For a locked file with download (read) prevented:**

If USER1 has locked (and read blocked) the file:

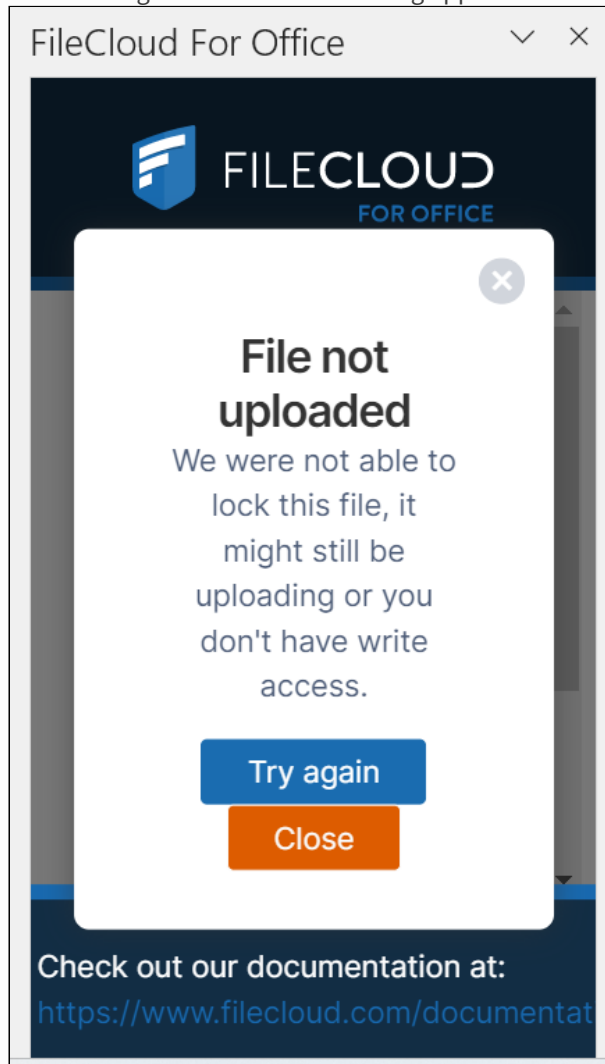
- The FileCloud client will not download the file for USER2

However, if USER2 has already downloaded the file in Sync or Drive, then:

- FileCloud Sync will allow FileCloud for Office to open the file.
- FileCloud Drive will not allow the file to be opened by USER2, unless Drive has already cached the file.

















**If an admin prevents file locking after a user has locked a file in a client:**

- The lock is automatically removed from the file
- Additional files cannot be locked using FileCloud for Office, and when you attempt to lock a file, an error message similar to the following appears:



If you are an admin and want to disable locking, see [Managing User Locks](#).

You can use the following table to understand the status of lock:

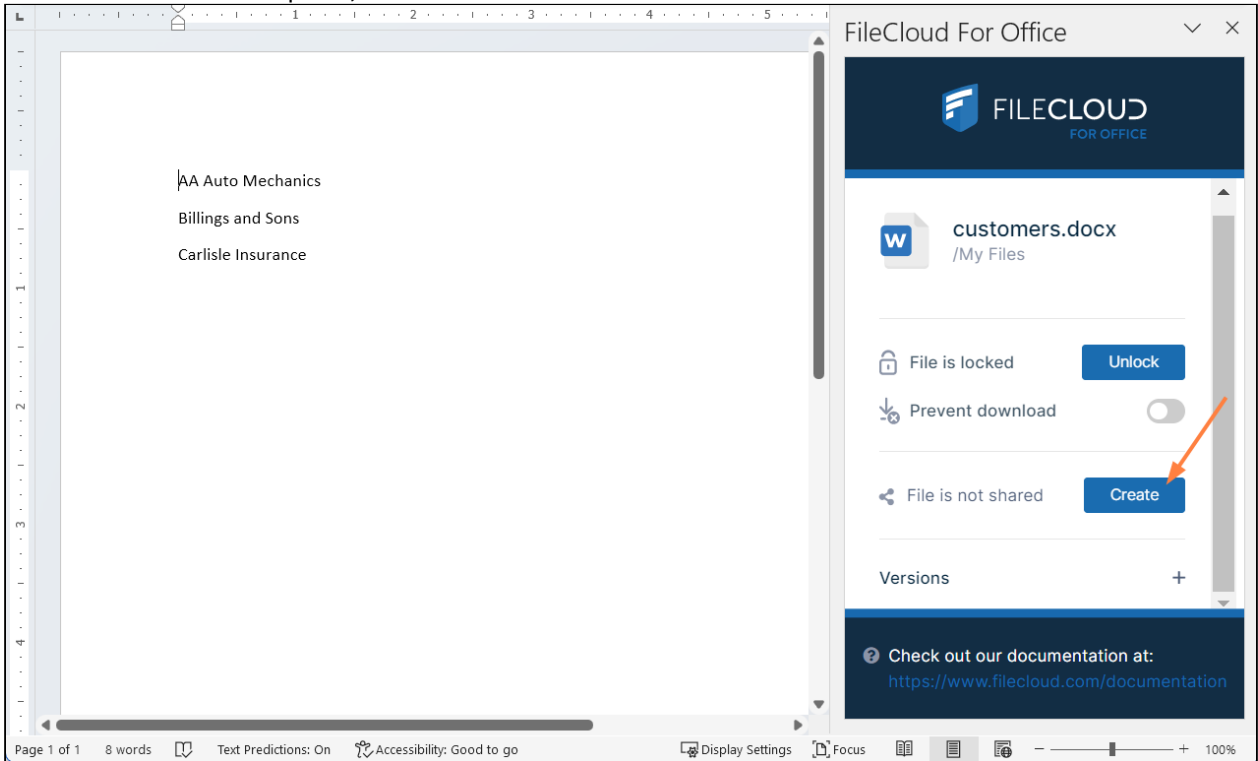
Action	Doc IQ Lock Enabled	Prevent Download	Lock Status Before Open	Lock Status After Open	Lock Status After close
An unlocked file is opened by USER1			File is not locked	File is locked (read allowed) by USER1	File is not locked
An unlocked file is opened by USER1			File is not locked	File is not locked	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (Read Allowed) by USER1	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (Read Allowed) by USER1	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1	File is not locked
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1

Share a file

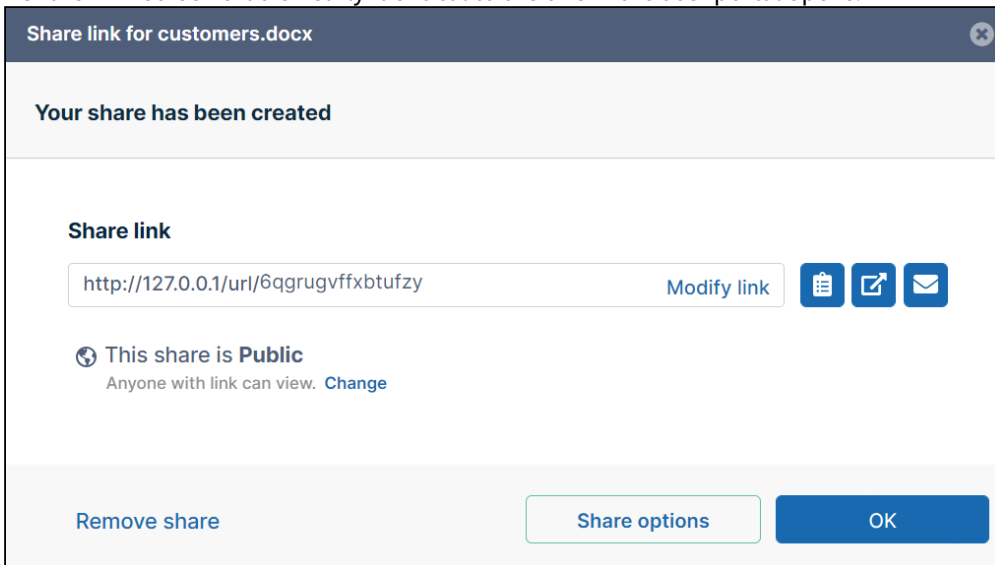
### Sharing a file

**To share a file or folder that is opened with FileCloud for Office:**

1. In the FileCloud for Office panel, click **Create**.



A Share Link screen that is nearly identical to the one in the user portal opens:

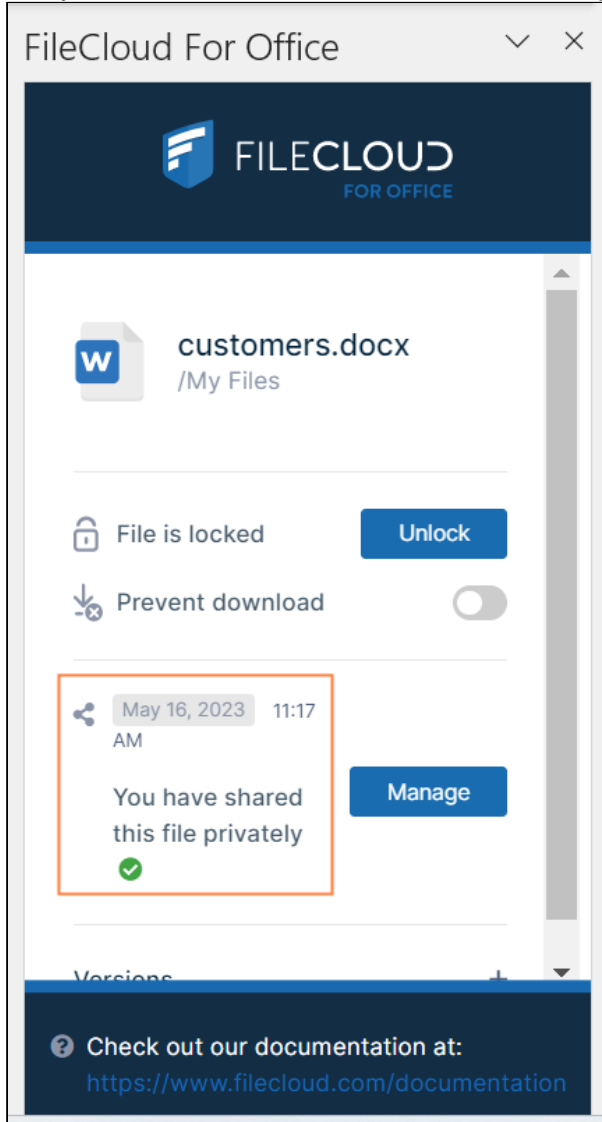


2. Share the file using the same settings and options that you would for a share in the user portal. See [Sharing Files and Folders](#) for help.

**Note:** The option for downloading the share QR code, which is available for shares created from the user portal, is not available for shares created in FileCloud for Office.



After you have shared the file, the FileCloud for Office panel displays details of the share:



3. Click **Manage** to change the options or permissions in the share.

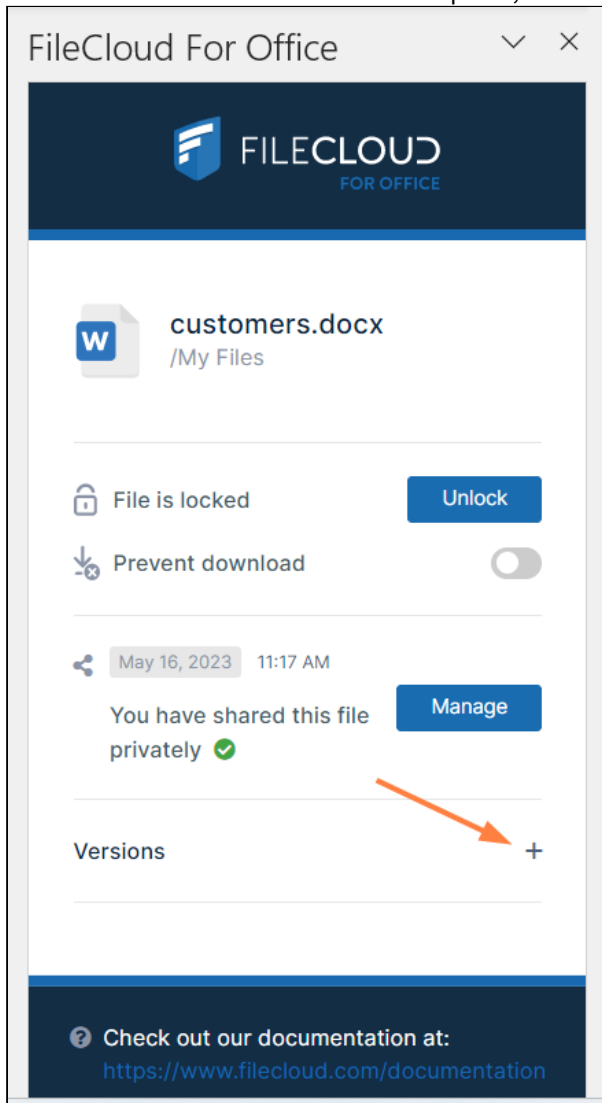
Download versions, view details and metadata

### **Downloading versions, viewing details, viewing metadata**

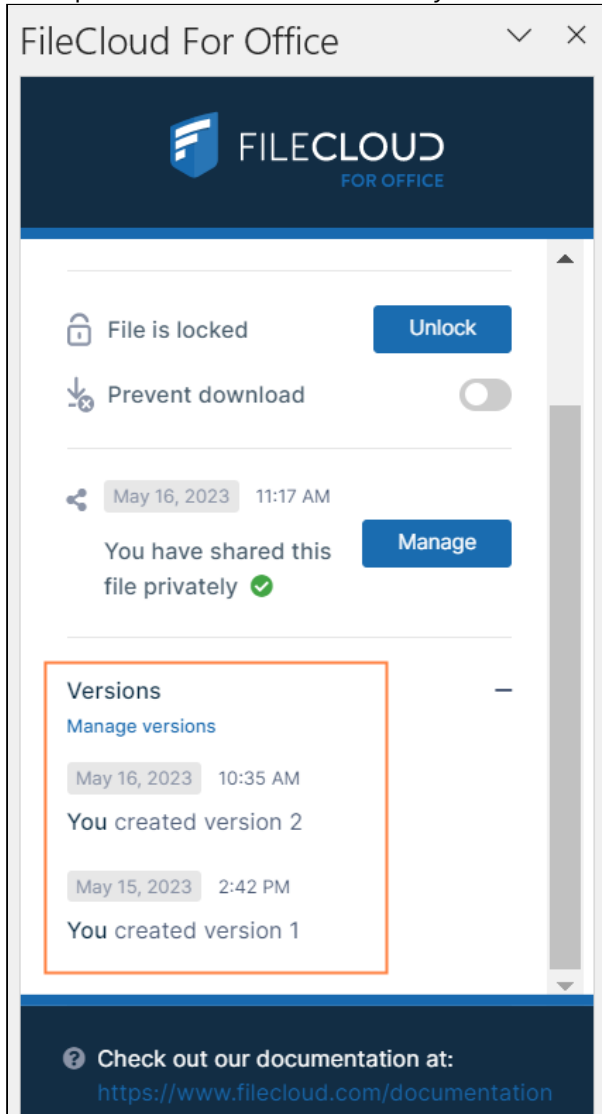
Versions

**To view a file's version information in FileCloud for Office:**

1. At the bottom of the FileCloud for Office panel, click the + across from **Versions**.

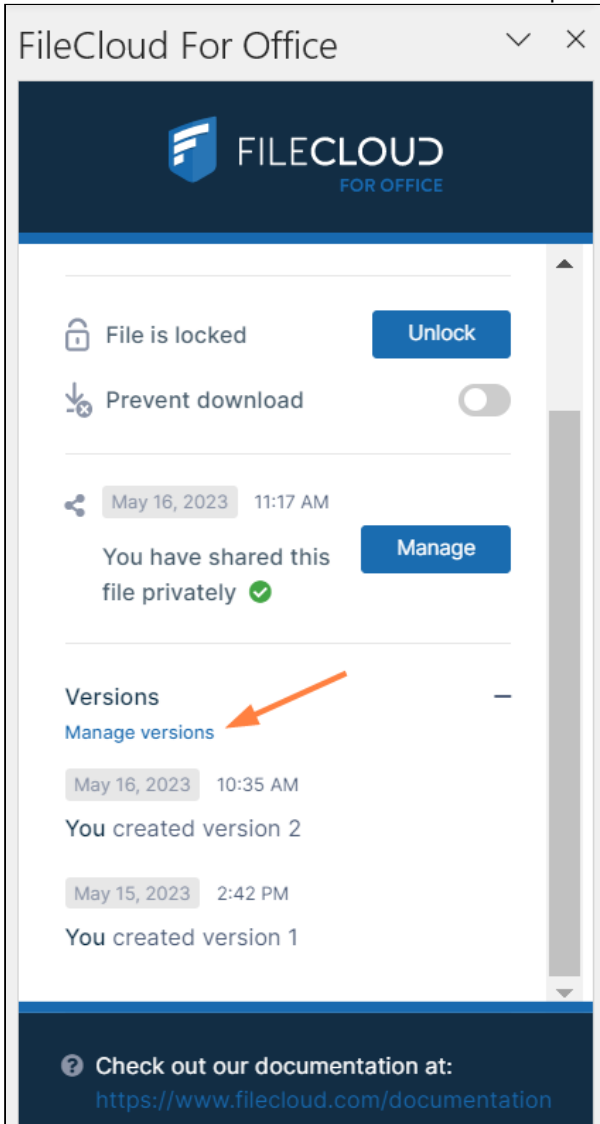


The expanded **Versions** section shows you version information about the file.

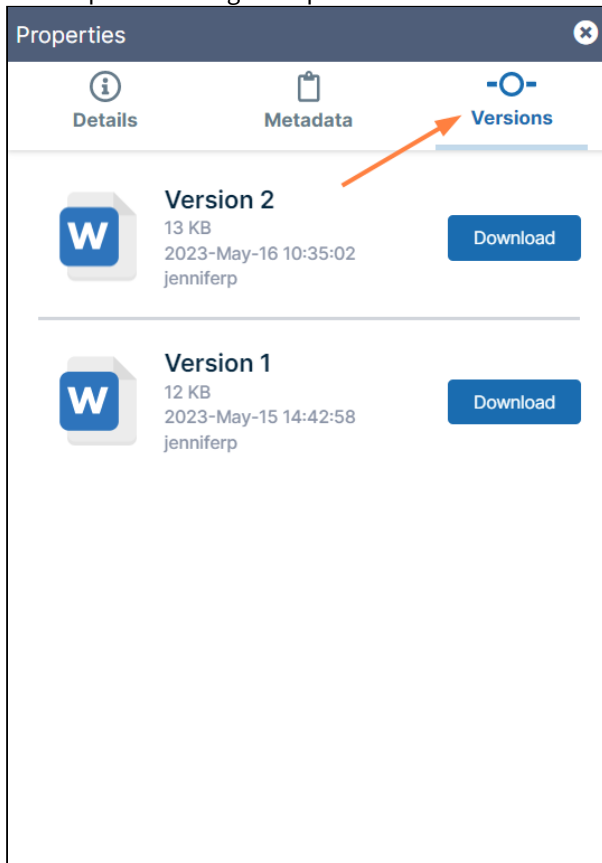


**To download file versions in FileCloud for Office:**

1. In the **Versions** section of the FileCloud for Office panel, click **Manage versions**.



The Properties dialog box opens to the **Versions** tab.

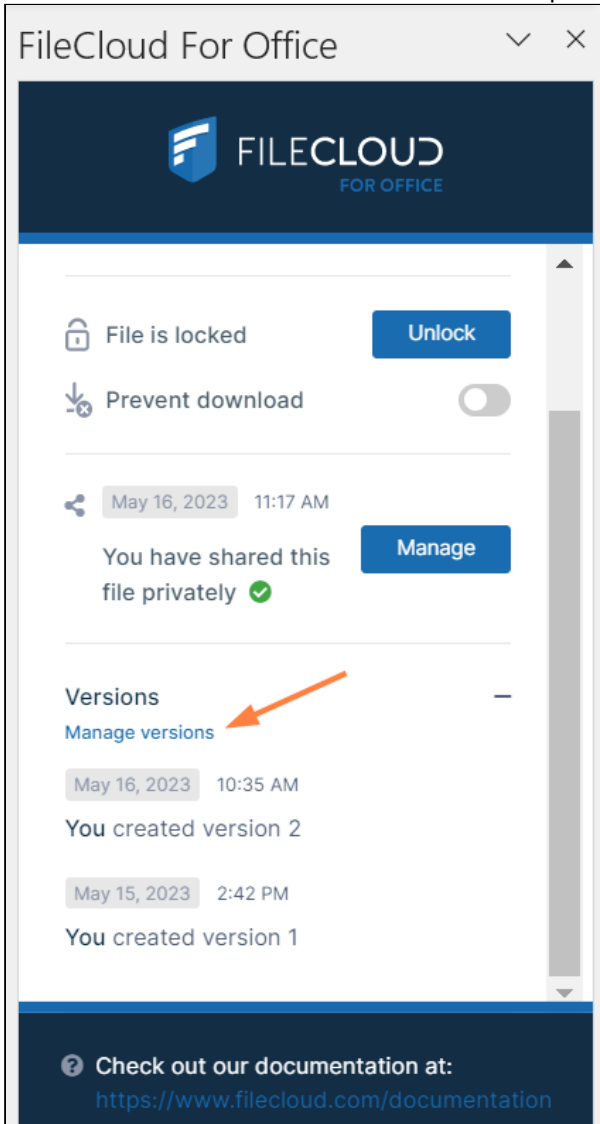


2. Click **Download** for the version that you want to download, and save it.

Details

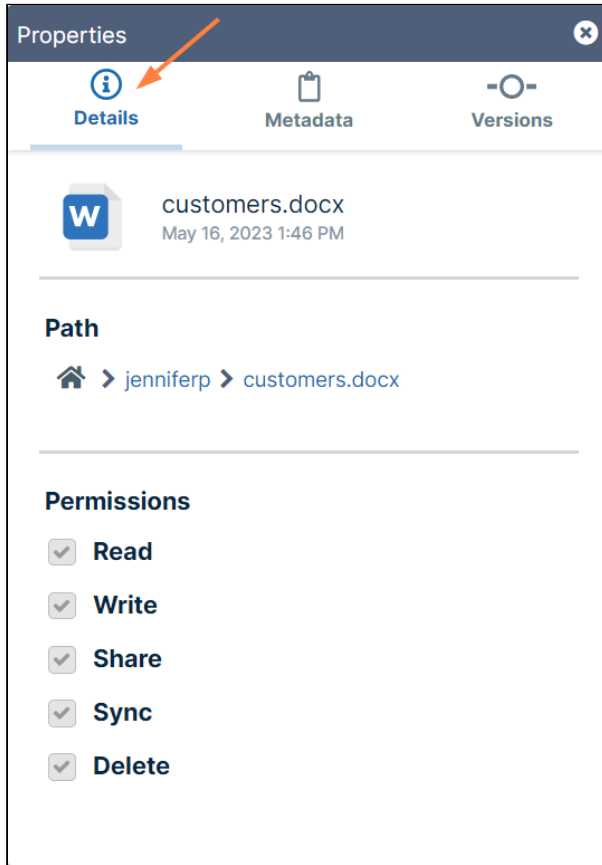
**To view file details:**

1. In the **Versions** section of the FileCloud for Office panel, click **Manage versions**.



The **Properties** dialog box opens to the **Versions** tab.

2. Click the **Details** tab.

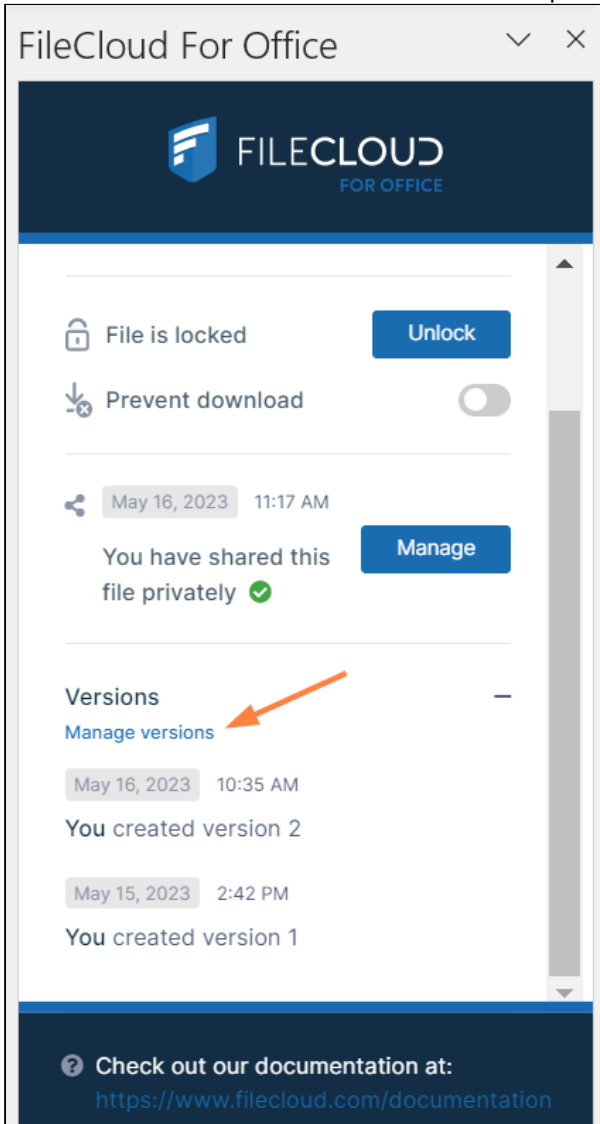


The details shown are the filename and type, the last modified date, the path of the file in FileCloud, and your permissions for the file.

Metadata

To view metadata information for the file:

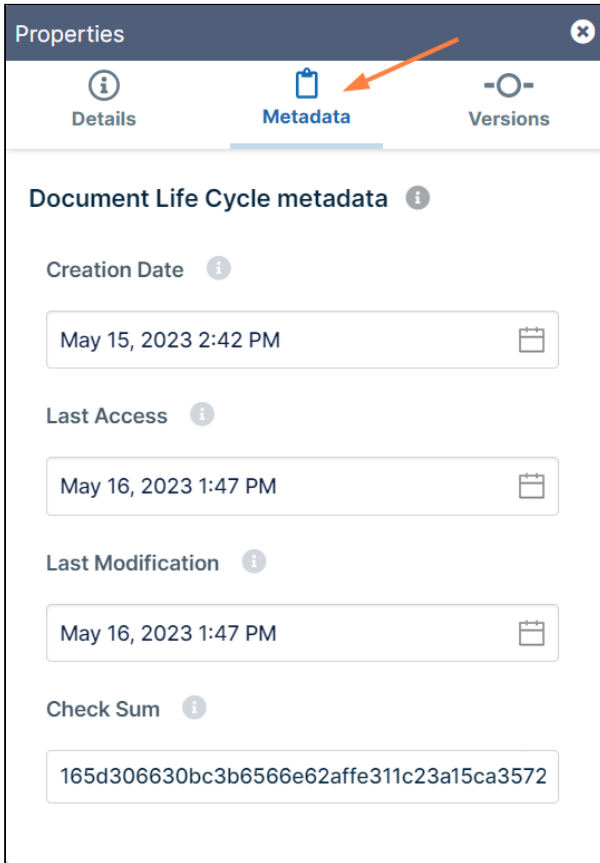
1. In the **Versions** section of the FileCloud for Office panel, click **Manage versions**.



2. **The Properties** dialog box opens to the **Versions** tab.



3. Click the **Metadata** tab.



Each metadata set applied to the file is listed with the values for its fields.

FileCloud for Office log locations

### Locating FFO logs

The locations of log files for FileCloud for Office in Windows and macOS are the following:

**Windows:** %appdata%/FFOserver

**macOS:** /Users/[USERNAME]/Library/Preferences/FFOserver

View and add comments

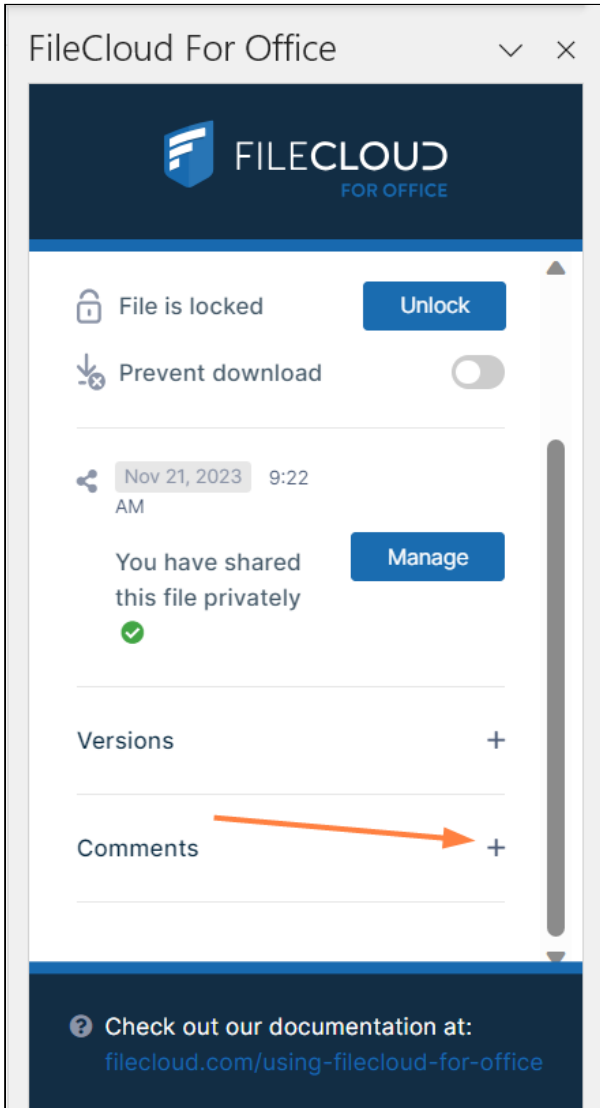
### Viewing and adding comments

Comments added to files and folders in FileCloud for Office also appear in the user portal and any of the other client apps.

### To view and add comments in FileCloud for Office:

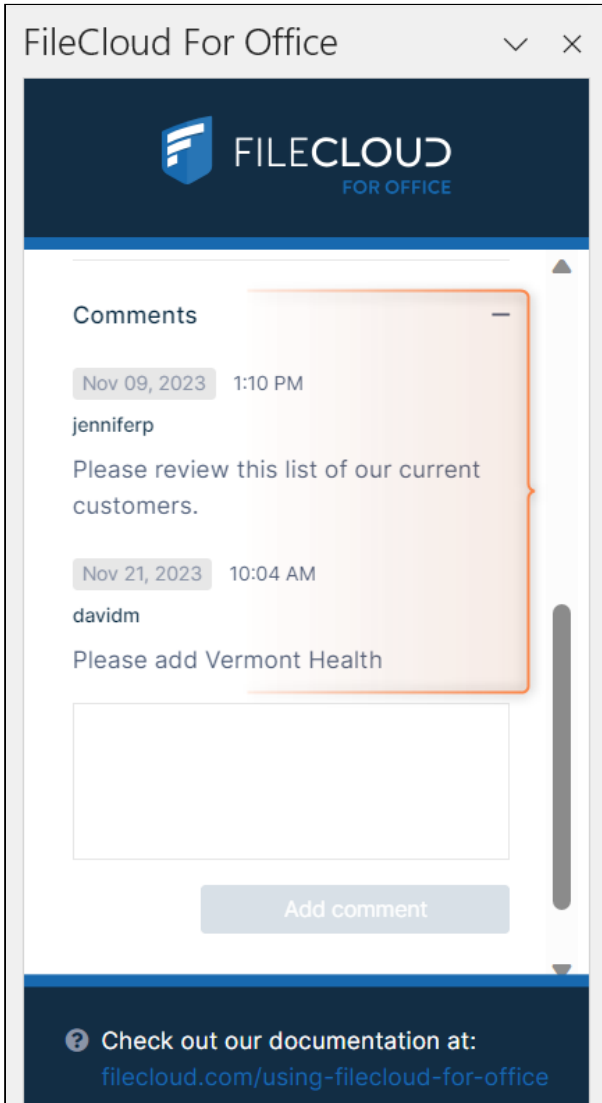
1. If **Comments** is not visible in the FileCloud for Office panel, scroll down to the bottom of the panel.

2. Click the + across from **Comments**.

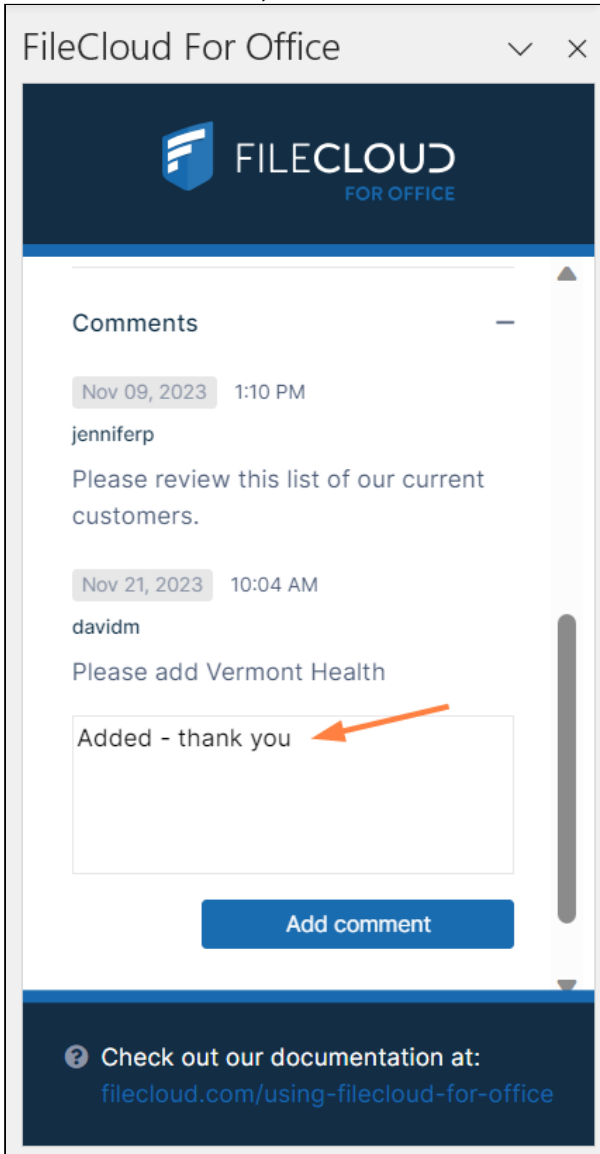


Any existing comments added to the file or folder here or anywhere else in FileCloud appear above

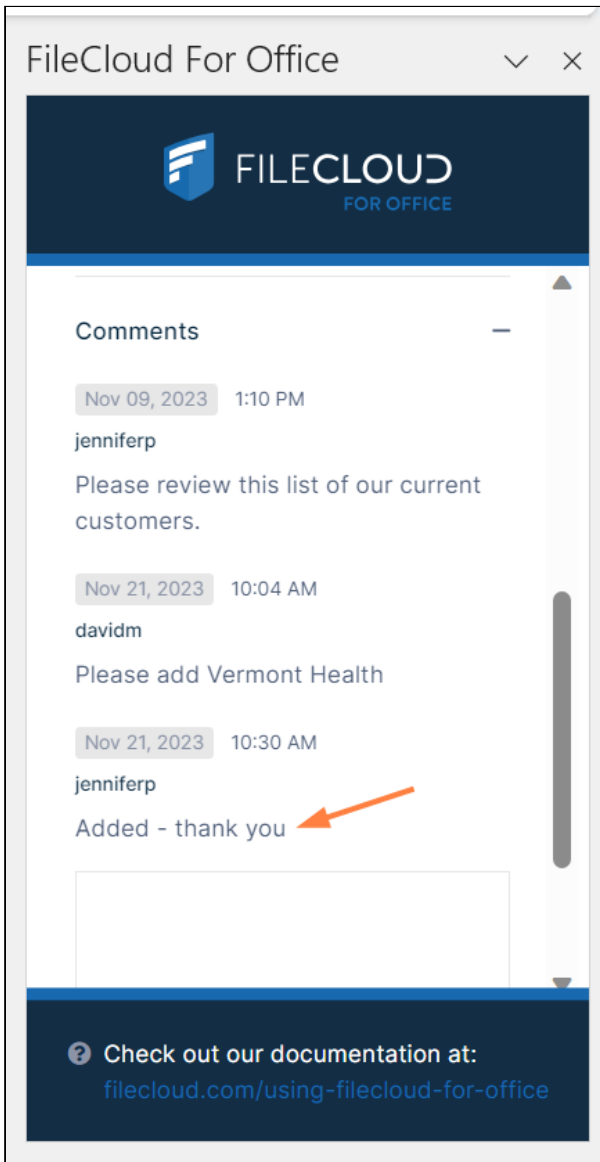
the **Comments** box.



3. To add a new comment, click inside the **Comments** box and enter the comment.



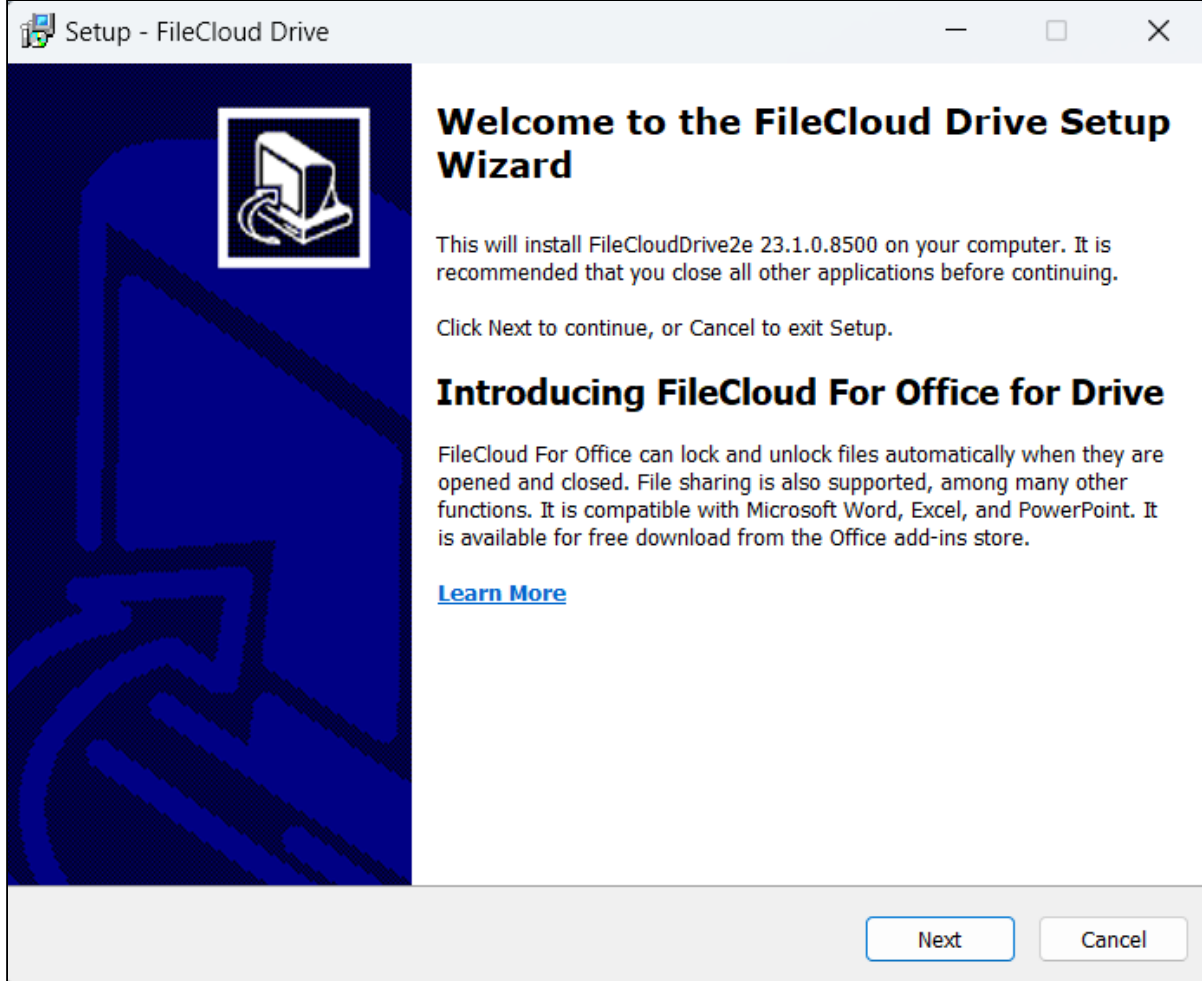
4. Click **Add comment**.  
The comment is added.



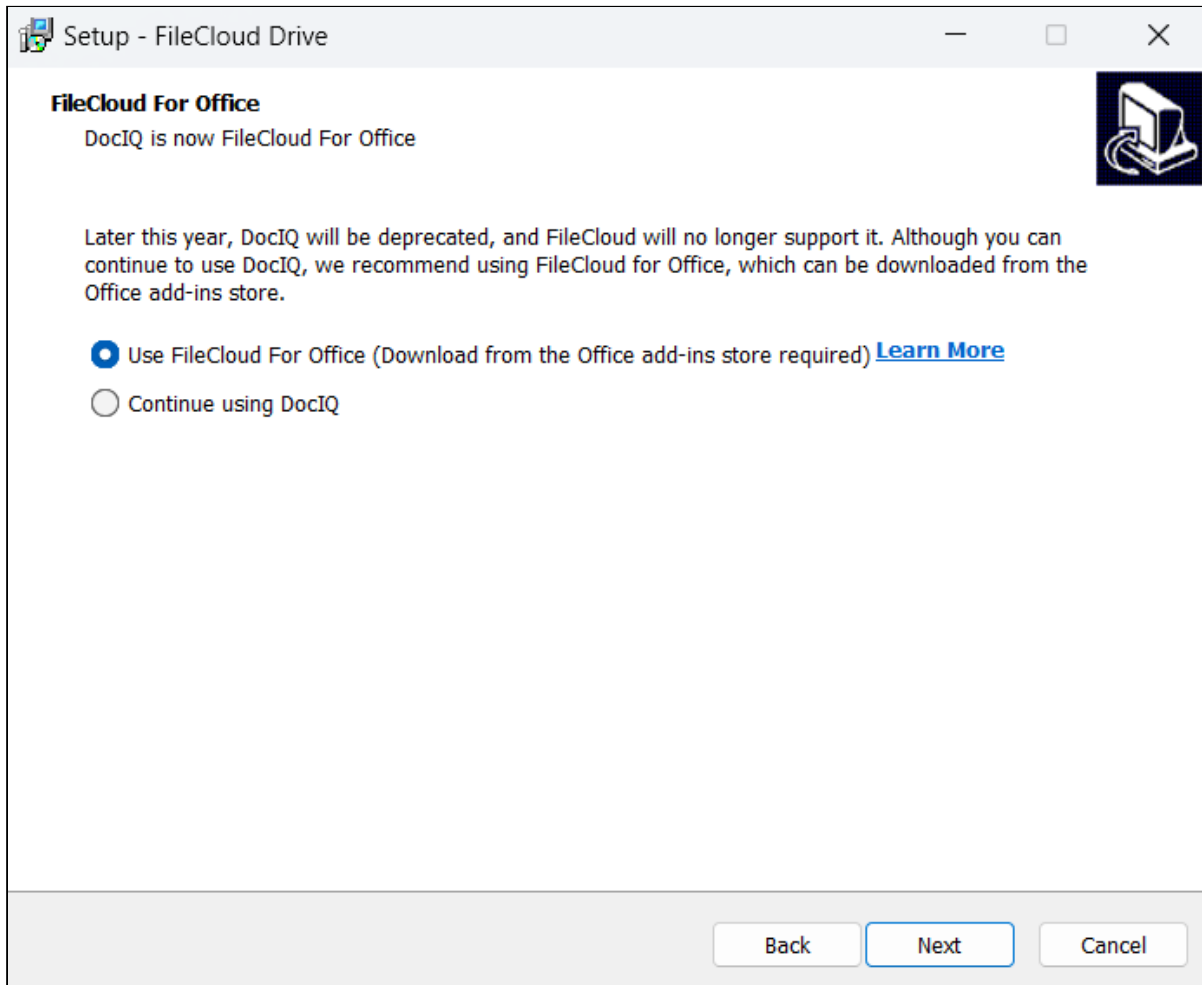
### For previous users of DocIQ

If you have never used FileCloud Drive with DocIQ before, the installer will automatically configure Drive for use with FileCloud for Office, and this section does not apply to you.

When you run the FileCloud Drive installer, the first screen of the wizard introduces you to FileCloud for Office:



If you have been using FileCloud Drive with DocIQ, the installer prompts you to choose whether you want to continue using DocIQ or switch to FileCloud for Office (DocIQ will be deprecated in the future).

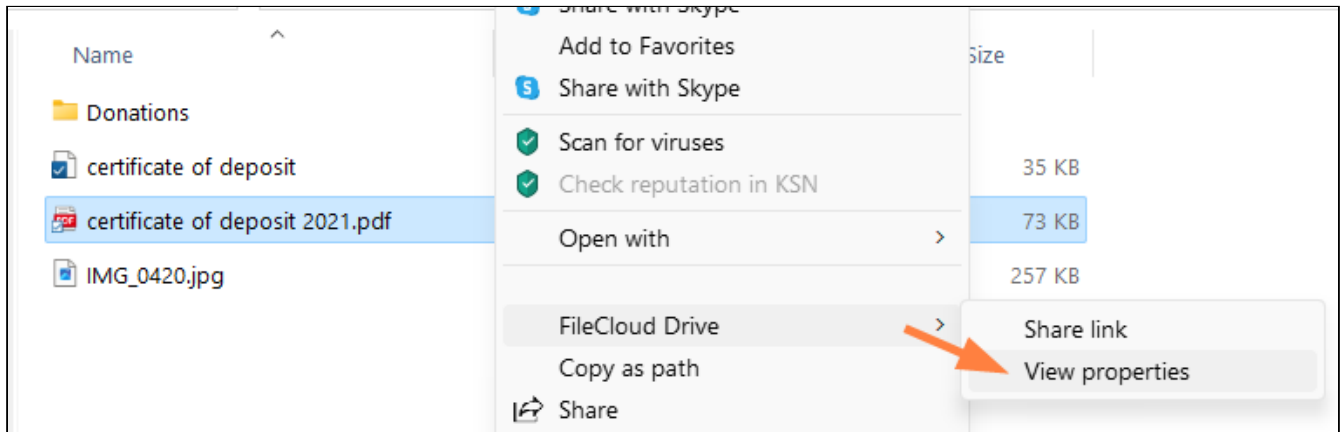


Choose whether you want to use FileCloud for Office or DocIQ. If you choose FileCloud for Office, you are also required to [install an add-in](#).

The installer configures your Drive installation to function with the option you have chosen.

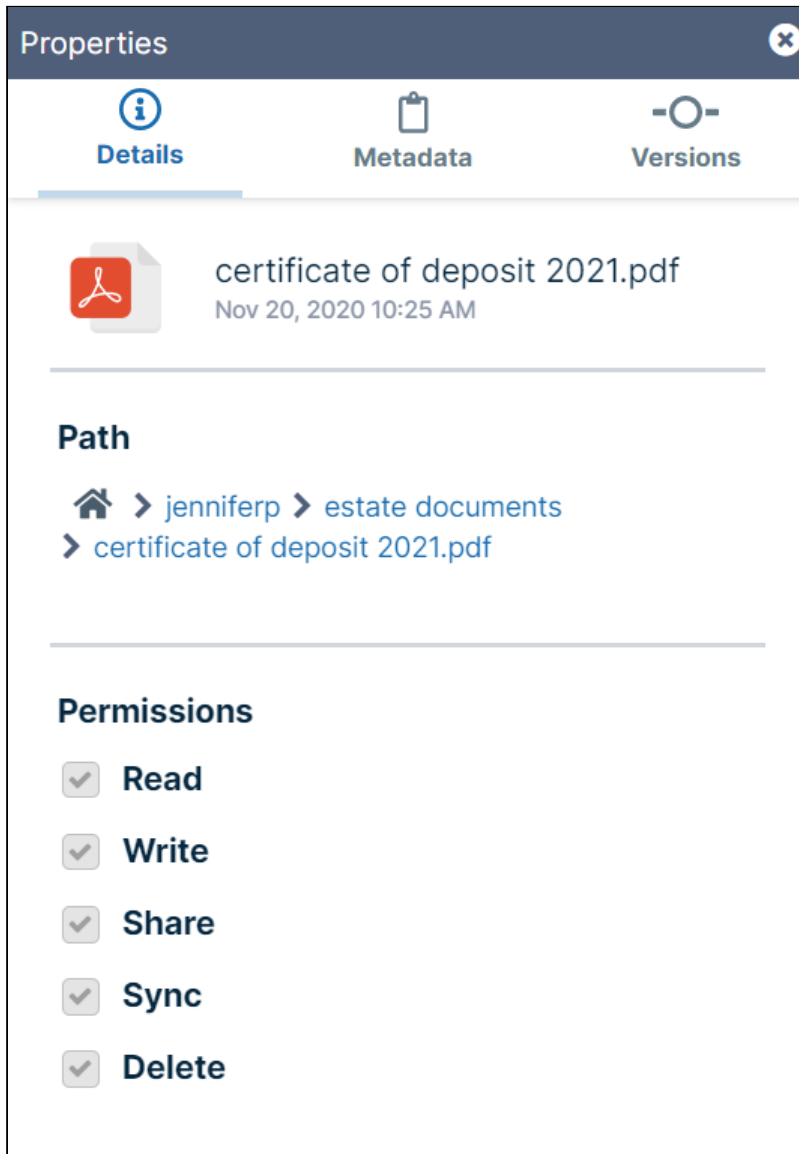
## Viewing Your File Permissions

In Drive, you can view the permissions you have on a file or folder by right-clicking it in content explorer and choosing **Show more options > FileCloud Drive > View properties:**



Drive's Properties window opens to the Details tab, which displays your permissions for the file or folder.





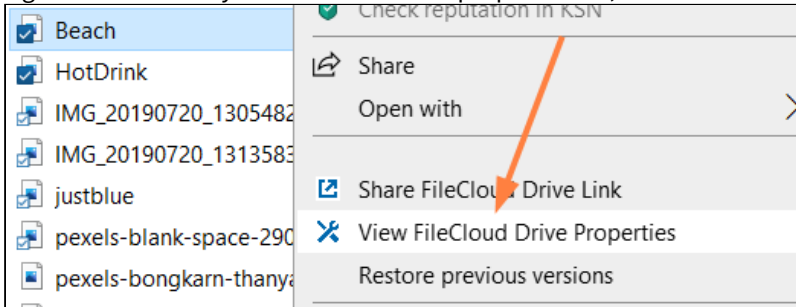
## Viewing and Modifying Metadata

You can see version and metadata information or add metadata tags by viewing file or folder properties.

To view properties:

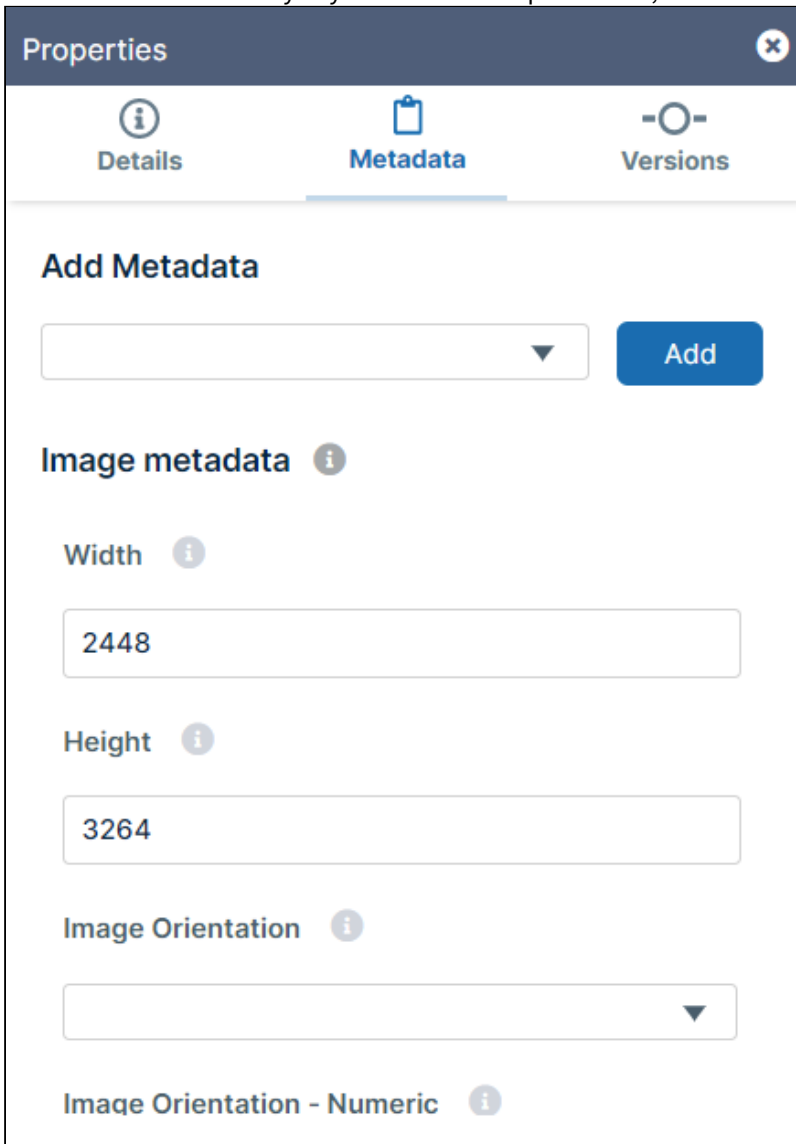
1. Launch FileCloud Drive by right-clicking on the icon in your system tray and choosing **Open Folder**.
2. A File Explorer window opens, displaying the contents of your mapped drive.

- Right-click the item you want to view the properties for, and then select **View FileCloud Drive Properties**.



The **Properties** dialog box opens.

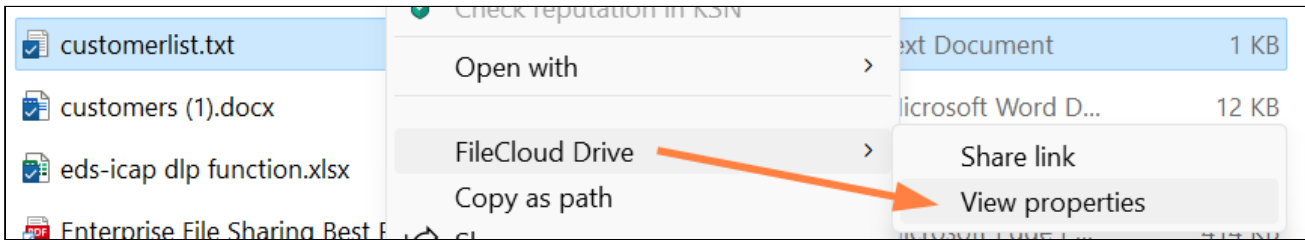
- Click the **Metadata** tab.
- View the metadata. Modify any values with edit permission,



## Viewing and Downloading File Versions in Drive

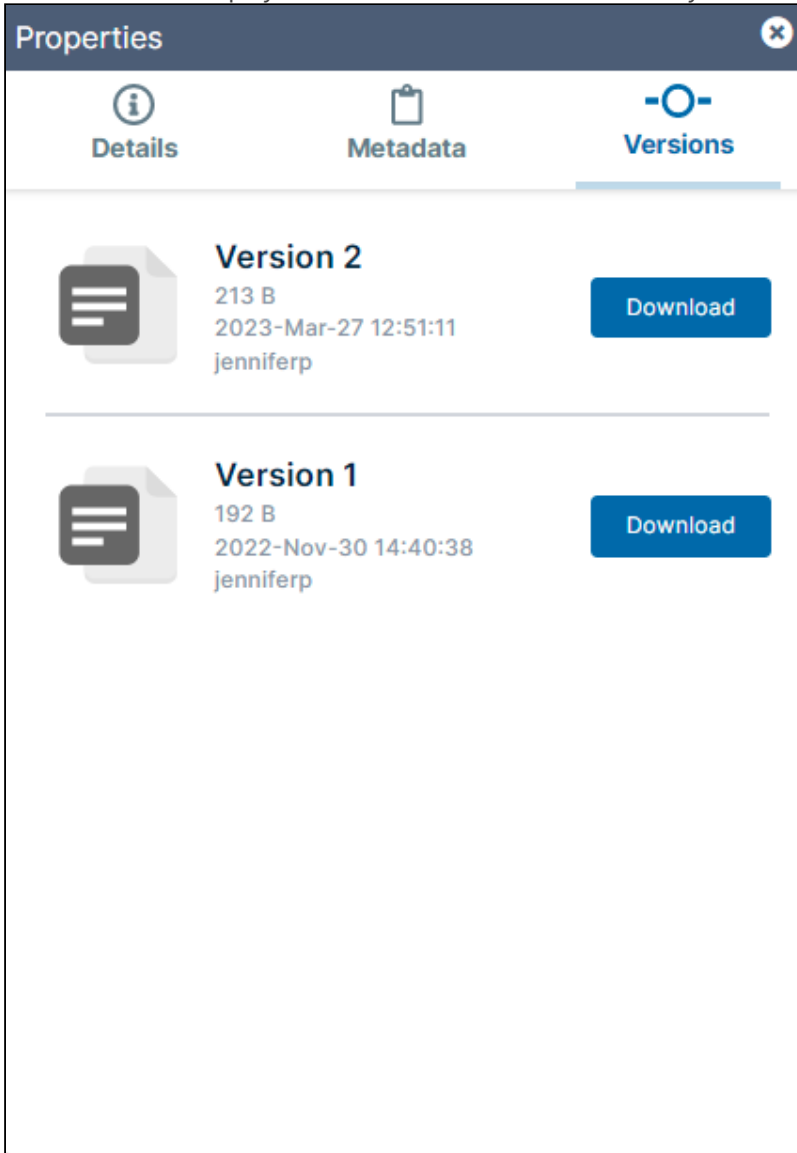
When a file is modified in FileCloud, the original file is saved as the prior version.

In Drive, you can view and download all versions of a file by right-clicking it in content explorer and choosing **Show more options > FileCloud Drive > View properties:**






Drive's **Properties** window opens. Click the **Versions** tab.

The **Versions** tab displays each version of the file and enables you to download it.



## Checking Drive Status

Drive indicates its status by the icon shown in the system tray:

Icon	Image	Status
	Drive standard icon	Drive action was successful or no activity
	Hourglass	Drive is performing an action
	Hourglass with red dot	Error in Drive activity

Click the icon to open the dashboard.

## Using FileCloud Drive in a Remote Desktop Service Environment.

### Configuration Requirements

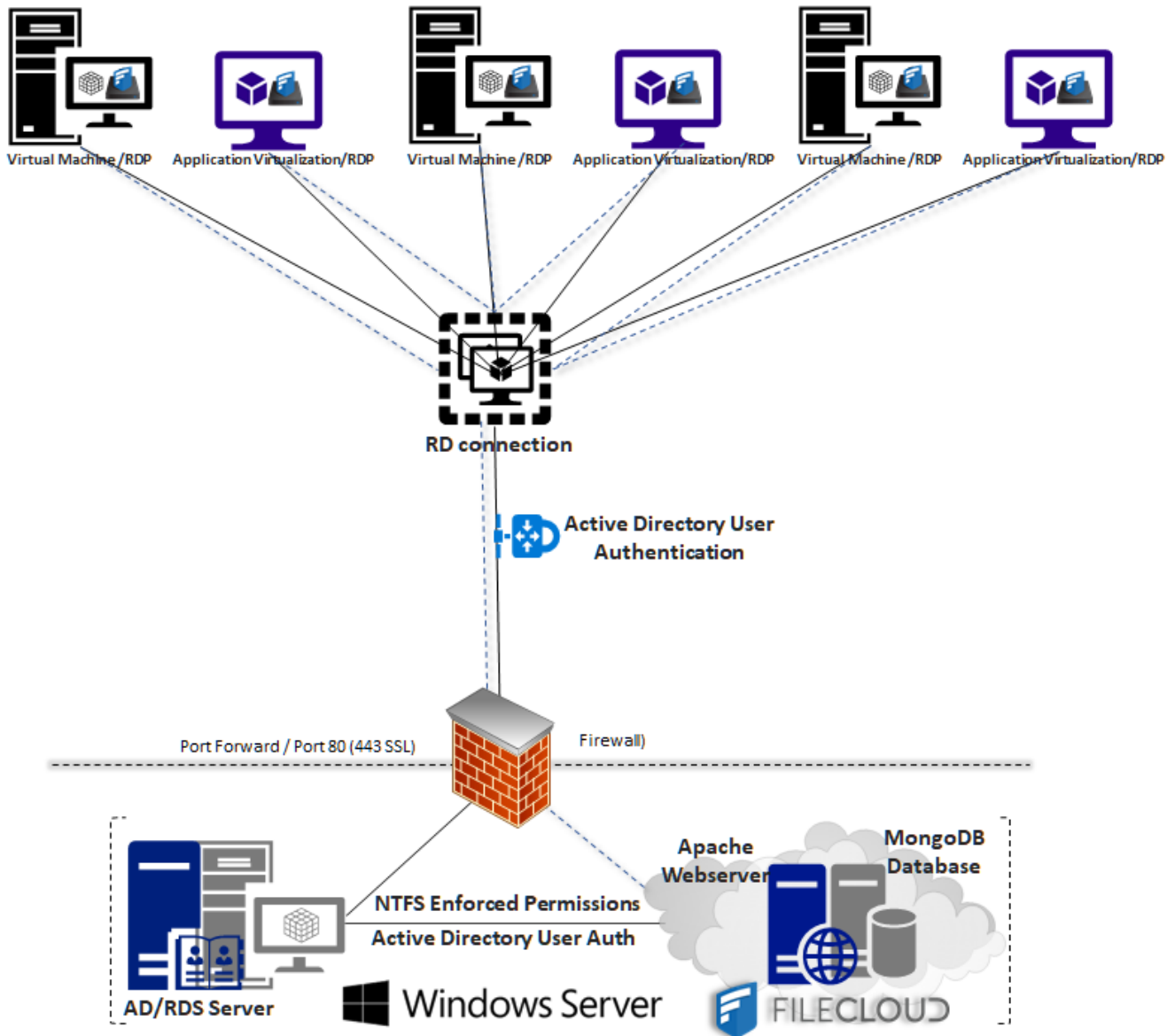
- FileCloud Drive needs to have multi-mount enabled. To enable multi-mount, add the parameter `<multimount>1</multimount>` in `config.xml`.
- To avoid mount letter overwrites, add the parameter `<useuniquemountlabel>1</useuniquemountlabel>` in `config.xml`.
- `config.xml` file is located at `C:\Program Files\FileCloud Drive\service`.

### Environment Requirements

- Windows Server 2012-2019 x64
- The Remote Desktop Service environment containing the following minimum requirements (1 Domain controller / 1 RD Connection Broker / 1 RD Session Host / 1 RD Gateway & Licensing / 1 RD Web Access (IIS) ).

### Additional Information.

- The Remote Desktop Service Terminal Server will share its resources across all active user sessions. Due to this FileCloud Drive's performance may be impacted if the server does not have enough resources. Please be sure to assign enough resources to your server depending on your usage.
- FileCloud Drive will be hosted on the terminal server, but it will mount directly on the user's computer.
- Make sure FileCloud Drive is visible in RD Web Access once you have published it.
- The `config.xml` file is located at `C:\Program Files\FileCloud Drive\service`.



## FileCloud Drive Remote Desktop Service Access

In order to provide access to remote users, install FileCloud Drive within the hosting Remote Desktop Service server, and then publish it.

### To publish FileCloud Drive:

1. Go to **Windows Server Manager > Remote Desktop Services > Collections**.
2. In the navigation panel, under **Collections**, choose your collection.  
In the image below, the selected collection is **FileCloud Deployment**.

3. Under **Remoteapp Programs**, in the **Tasks** drop-down list, choose **Publish RemoteApp Programs**.

The screenshot shows the Server Manager console with the following sections:

- Navigation:** Overview, Servers, Collections (selected), FileCloud Deplo...
- PROPERTIES:** Properties of the collection. Collection Type: Session, Resources: RemoteApp Programs, User Group: FILECLOUDSERVER\Domain Users.
- REMOTEAPP PROGRAMS:** Last refreshed on 7/1/2019 3:31:04 PM | Published RemoteApp programs | 9 total. A table lists programs with columns for Name, Alias, and Visible in RD Web Access. The 'FileCloudDrive2' row is selected. A 'TASKS' dropdown menu is open, showing 'Publish RemoteApp Programs' and 'Unpublish RemoteApp Programs'.
- HOST SERVERS:** Last refreshed on 7/1/2019 2:37:32 PM | All servers | 1 total. A table lists servers with columns for Name, Type, Virtual Desktops, and Allow New Connections. The 'WIN-692E5KFKPBN' row is selected.
- CONNECTIONS:** Last refreshed on 7/1/2019 2:37:35. A table with columns for Server FQDN, User, and Session Status.

The Publish RemoteApp Programs dialog box opens.

4. Select **FileCloudDrive2** from the list and click **Next**.

The screenshot shows the Server Manager console with the 'Publish RemoteApp Programs' dialog box open. The dialog box is titled 'Select RemoteApp programs' and contains a list of programs to be published. The 'FileCloudDrive2' program is selected, and the 'Next >' button is highlighted.

The dialog box contains the following information:

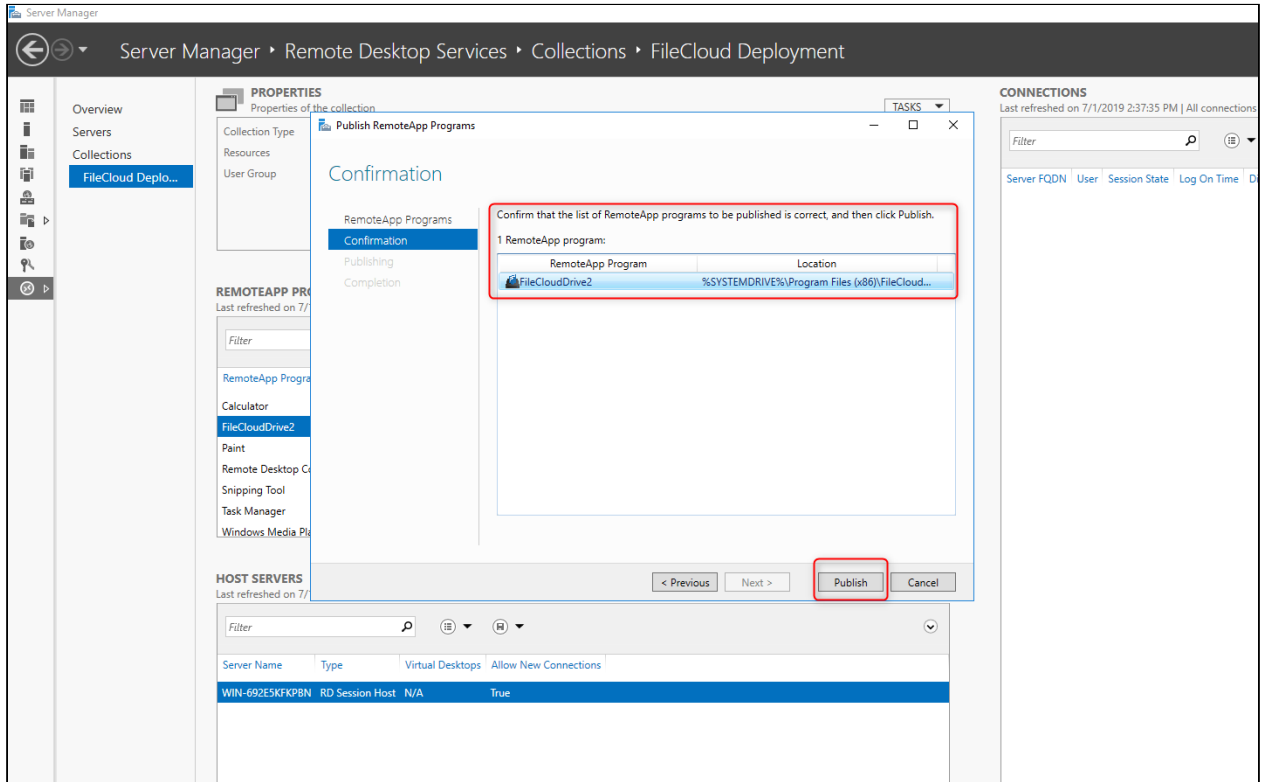
- Collection Type:** Publish RemoteApp Programs
- RemoteApp Programs:** Select the RemoteApp programs to publish to the FileCloud Deployment collection. To add a RemoteApp program to the list, click Add.
- The RemoteApp programs are populated from:** WIN-692E5KFKPBN.FILECLOUDSERVER.US.
- Program List:**

RemoteApp Program	Location
<input type="checkbox"/> Active Directory Administrative C...	%SYSTEMDRIVE%\Windows\system32\dsac.exe
<input type="checkbox"/> Active Directory Module for Wind...	%SYSTEMDRIVE%\Windows\system32\Window...
<input type="checkbox"/> Calculator	%SYSTEMDRIVE%\Windows\system32\win32cal...
<input type="checkbox"/> Character Map	%SYSTEMDRIVE%\Windows\system32\charmap...
<input type="checkbox"/> Defragment and Optimize Drives	%SYSTEMDRIVE%\Windows\system32\dfrgui.exe
<input type="checkbox"/> Disk Cleanup	%SYSTEMDRIVE%\Windows\system32\cleanmg...
<input type="checkbox"/> DNS	%SYSTEMDRIVE%\Windows\system32\dnsc.exe
<input checked="" type="checkbox"/> FileCloudDrive2	%SYSTEMDRIVE%\Program Files (x86)\FileCloud...
<input type="checkbox"/> Group Policy Management	%SYSTEMDRIVE%\Windows\system32\mmc.exe
<input type="checkbox"/> Internet Information Services (IIS)	%SYSTEMDRIVE%\Windows\system32\inetrv\l...
- Buttons:** < Previous, **Next >**, Publish, Cancel

The 'Next >' button is highlighted with a red box. Below the dialog box, the 'HOST SERVERS' section shows a table with the following data:

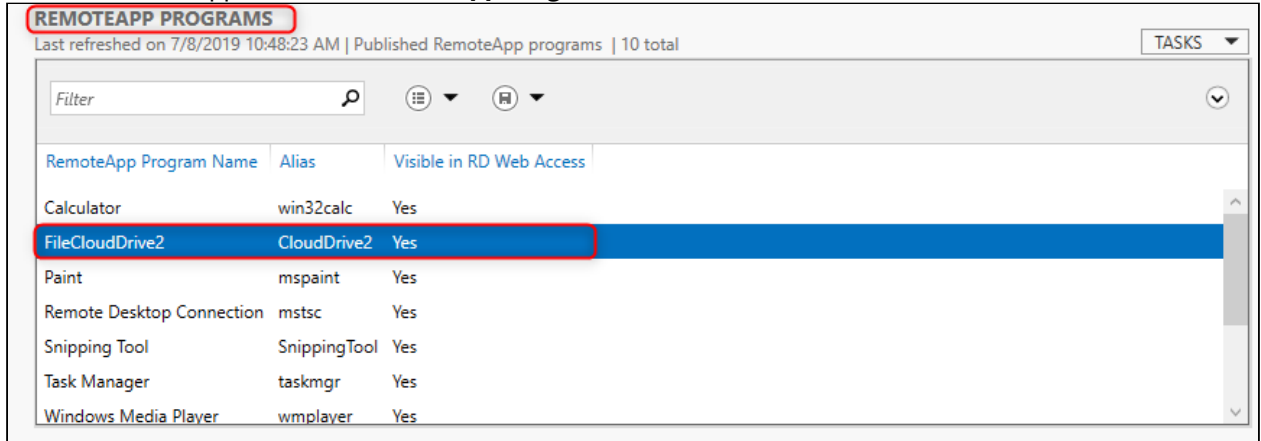
Server Name	Type	Virtual Desktops	Allow New Connections
WIN-692E5KFKPBN	RD Session Host	N/A	True



5. Then click **Publish**.

## 6. When publishing completes, close the window.

**FileCloudDrive2** appears under **RemoteApp Program Name**.

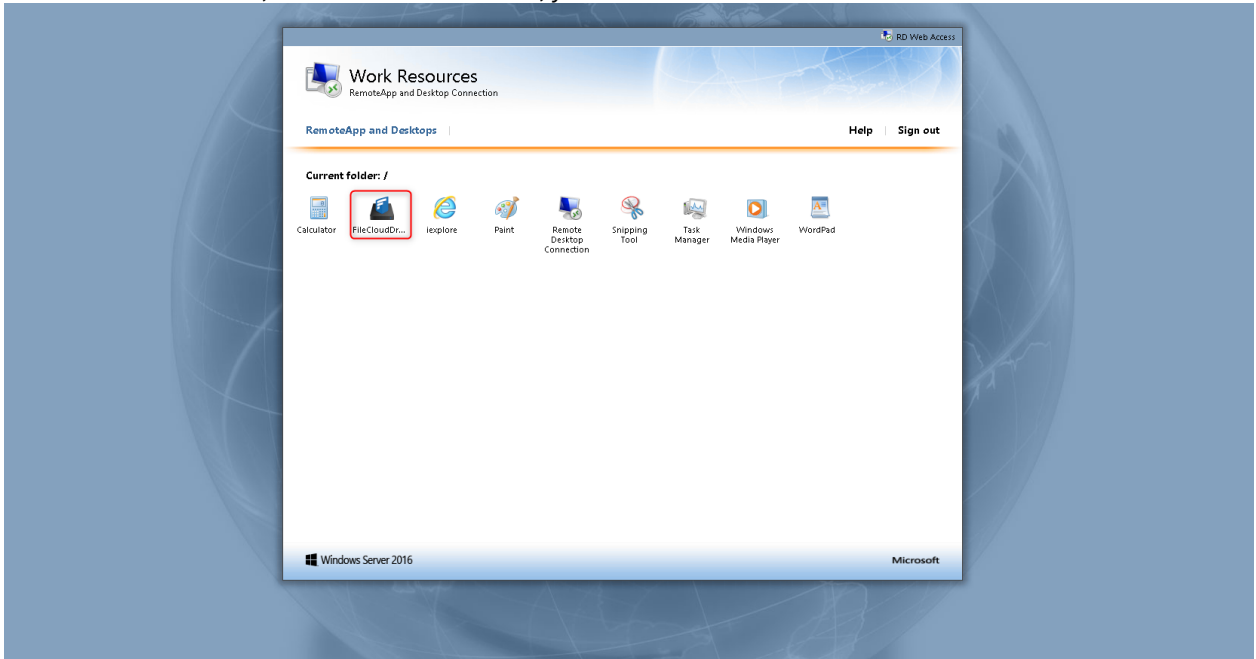


## Accessing FileCloud Drive via Remote Desktop Web Access.

After you publish FileCloud Drive, if it is enabled in your **RemoteApp and Desktops** setup, your users will have access to it via Web.

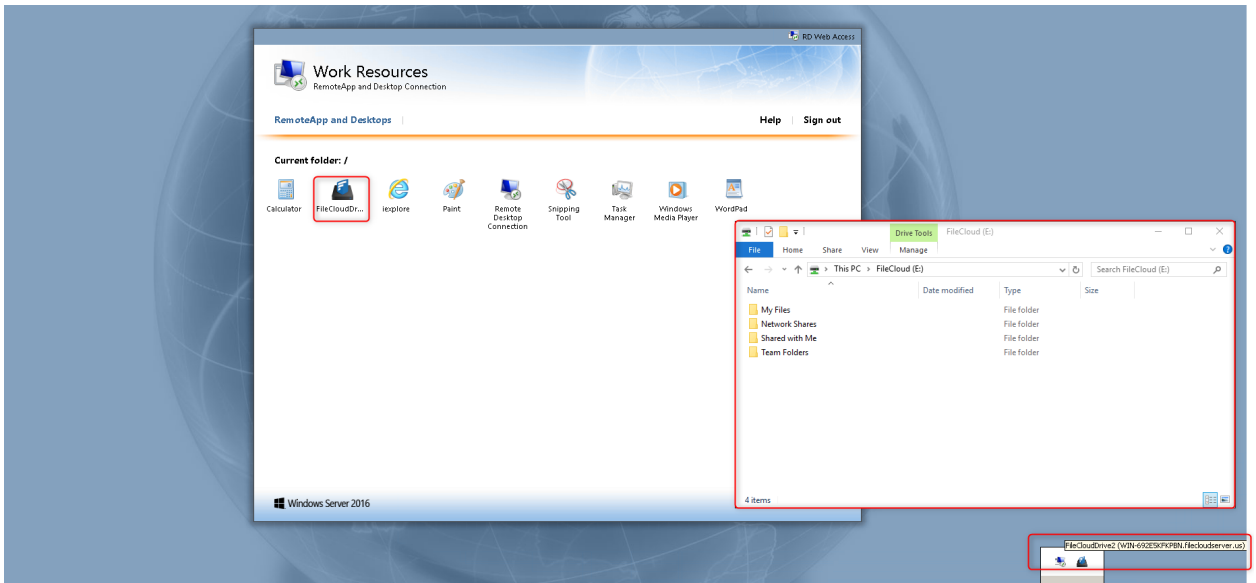
**To access FileCloud Drive via web:**

1. Enter the web IP or URL, and once authenticated, you will see **Work Resources** with FileCloud Drive listed.



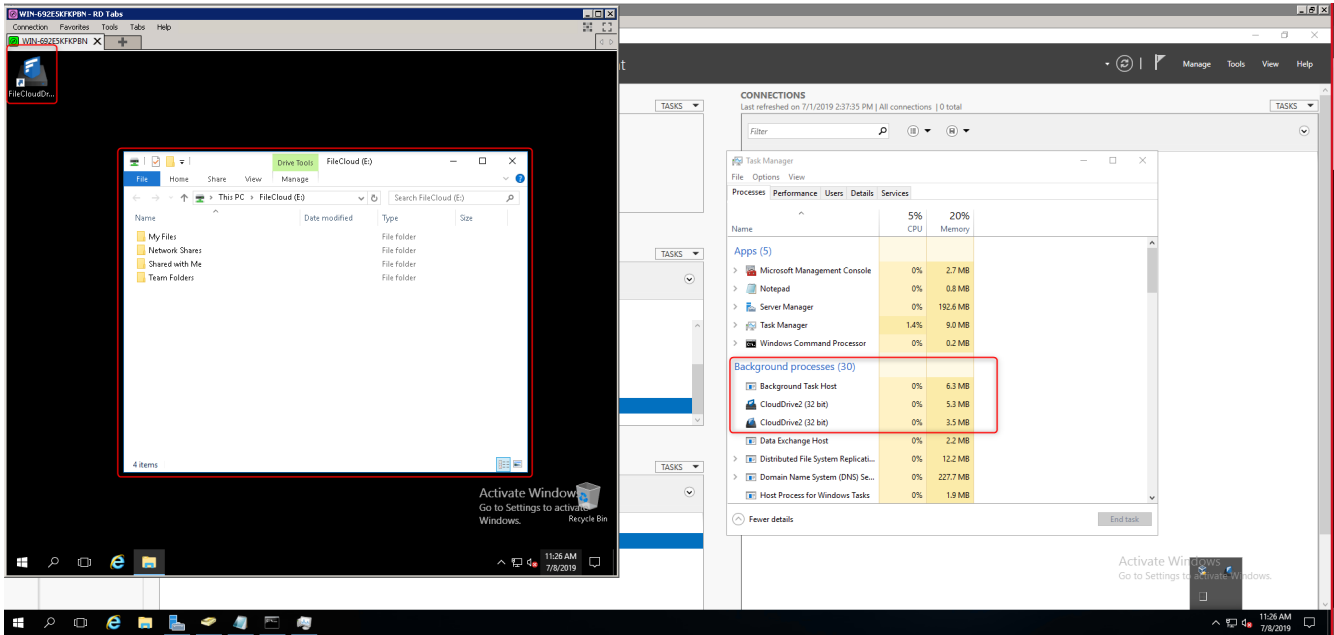
2. To open a remote desktop protocol, click on the FileCloud Drive icon.
3. Click on a file to open it in FileCloud Drive.

**NOTE: You may be asked to authenticate your windows credentials as well as FileCloud Drive credentials on the first run.**



## Accessing FileCloud Drive via Remote Desktop

To access FileCloud via Remote Desktop, connect via RDP using the URL or IP provided by the system administrator, and authenticate with your username and password. Once done you will be able to access FileCloud Drive from within the virtual machine.



## Troubleshooting Drive

### Limitations:

- If Sophos Antivirus is installed, Drive application performance with large files (10MB+) is impacted.

## FAQ - FileCloud Drive

Here are some of the Frequently Asked Questions (FAQ) about FileCloud Drive.

💡 Click on a link to expand it.

### Why Are My Shortcuts Not Working?

There is a limitation to creating shortcuts to FileCloud Drive. When a user reboots their PC shortcuts no longer work because the map FileCloud Drive uses to build the path to your files is deleted when the PC reboots. You can create a new shortcut after you navigate through the application, and the map is recreated.

### Which Special Characters Cannot Be Used in File and Folder Names?


Folder and file names cannot contain:

- ..
- \
- /
- :
- \*
- ?
- "
- <

- >
- |

### Why, when my computer is restarted, does Drive log me in as the previous log-in user?

By default, Drive automatically logs you in as the previous log-in user even after your machine is restarted.

 To read the answer to a question, click on one of the following links:

- [→ Can I See a List of My Recent Activities?](#)
- [→ How Do I Use a Proxy Server to Connect?](#)
- [→ How Do I Lock Files that I Am Editing?](#)
- [→ Can I Use Two-Factor Authentication to Connect?](#)
- [→ Can I Upload Files Larger Than the Storage Quota?](#)
- [→ Drive File Issues](#)

## Drive File Issues

FileCloud Drive may be unable to upload files and folders with the following naming characteristics.

 These differ slightly for Drive for Mac.


### Long Filenames or Paths

The Windows operating system only allows files and folder names of around 260 characters or less. So paths longer than those are not uploaded. If the entire file path and name exceed 260 characters, shorten the name or move the file or folder to a higher-level folder within FileCloud.

### Special Characters

FileCloud Drive doesn't upload some files with characters that are incompatible with certain operating systems.

Please rename them to something more suitable for use across multiple operating systems.

 • The \* character

- The < character
- The > character
- The : character
- The \ character
- The / character
- The | character
- The ? character
- The \* character
- The ~ character

The following file and folder names are also not uploaded.



- tonido.db
- Thumbs.db
- desktop.ini
- \*.tmp\*
- \*.~tmp
- \*.lnk
- Files or Folders ending with space
- Files or folders ending with "." or ","
- .tonidocache
- Anything starting with Conflict\_
- sync.ico
- .ds\_store
- Any hidden files (usually files starting with . in Linux and files with hidden attribute in windows)
- \*.fuse\_hidden
- \*.crdownload
- \*.partial
- \*part
- \*.download
- \*.MACTF
- \*.dwl
- \*.dwl2

## Issues with Uploading a File to Drive

### 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](#).

## Why can't I upload files larger than the storage quota to a Network Folder or Team Folder?



- To create a drive in Windows, FileCloud must specify a size.
- When FileCloud mounts a virtual drive, your storage quota is used as the size of the drive.
- This mechanism restricts uploading files larger than the total size of the drive.

 You must have Administrator privileges to reset your storage quota. If you do not, please contact your administrator to change it for you.

If you need to change the storage quota for a particular user, you can edit their current policy settings or create a new policy.

 Administrators can read more about [Setting the Storage Quota for Users](#)

### To change the upload limit and size of the drive by changing the User Storage Quota:

1. Open a browser and log in to the **Admin Portal**.
2. From the left navigation pane, click **Settings**.
3. Click the **Policies** tab.
4. Click the **New Policy** button.
5. In the **New Policy** dialog box, type in the user's account name or a name for the policy, and then click **Create**.
6. On the **Manage Policy** screen, click the policy you just created, and then click the edit button (  ).
7. On the **Policy Settings** screen, on the **General** tab, change the **User Storage Quota**.  
To set unlimited storage quota for the user, set **User Storage Quota** to **0**.
8. Click **Save**.
9. From the left navigation pane, click **Users**.
10. On the **Manage Users** screen, click the user who you want to add to the new policy, and then click the edit button (  ).
11. On the **User Details** screen, click **Manage Policy**.
12. On the **User Policy** screen, across from **Selected Policy** click **Select**.
13. On the **Policy List** page, select the policy you created for this user, and then click **Select**.
14. On the **User Policy** screen, click **Close**.
15. On the **User Details** screen, click **Save**.

To change the default storage size in Drive, please [Contact FileCloud Support](#).

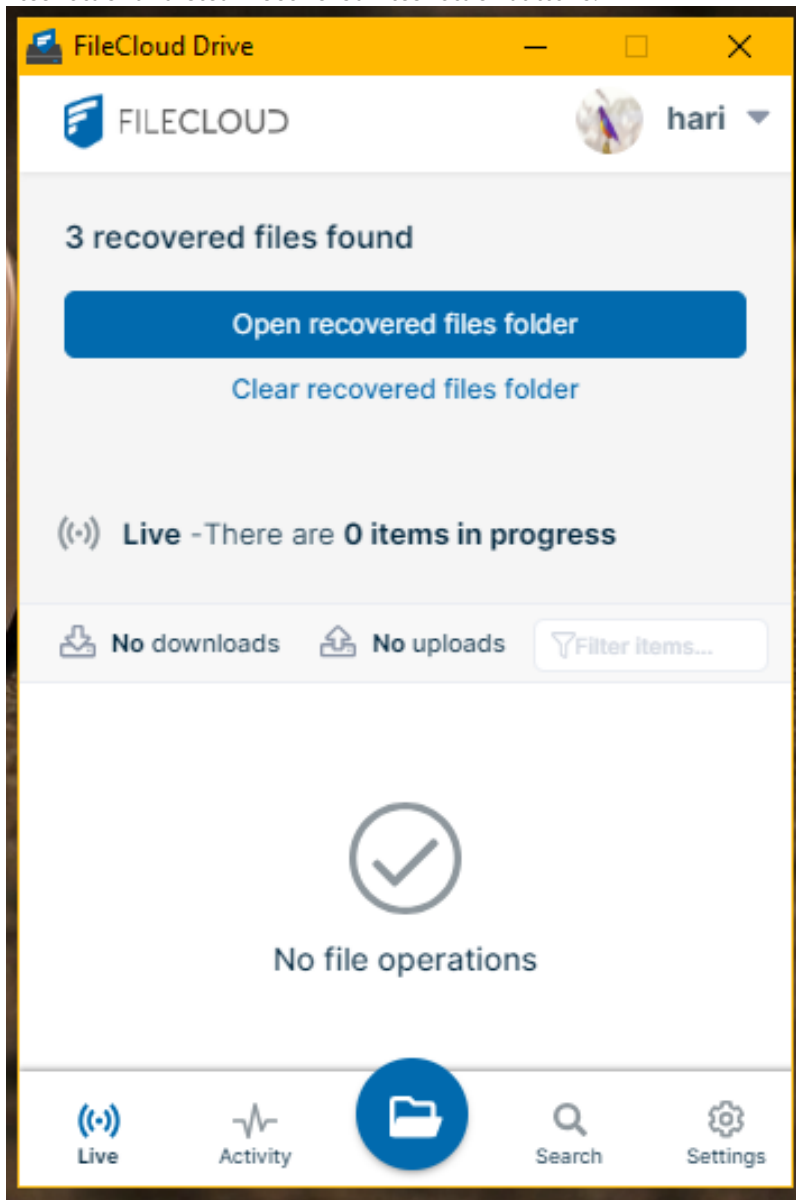
## Recover Files After Interrupted Drive Uploads

In the following scenarios, an upload may be interrupted because of network issues or other reasons:

- saving documents using FileCloud Drive
- uploading files using FileCloud Drive

In these cases the uploaded file is saved to a Recovered folder.

If there are any recovered files in the **Recovered** folder, your **Live** screen alerts you and displays an **Open recovered files folder** and **Clear recovered files folder** buttons.



**To retry the upload:**

1. Click the **Open recovered files folder** button.  
Your file explorer opens to the **Recovered** folder location.
2. Copy the interrupted file to the server and retry the upload.  
To avoid looping, first copy the files into another local directory (for example Downloads) and from there into the Drive folder for the upload.

**To empty the Recovered folder:**

- Click the **Clear recovered files folder** button.

## Cannot Lock XSL Files in Drive

When DocIQ is not enabled, locking of XSL files is not supported in Drive. In other words, When one user has opened an XSL file, other users can open it as well.

However, locking other types of files, including XSLX files, is supported when DocIQ is not enabled.

## Blank Error Messages in FileCloud Drive

### Problem

In the following scenarios, FileCloud Drive users may see a blank error message when connecting:



#### Attempted Re-try without Admin Intervention

1. A new device using FileCloud Drive tries to login to the FileCloud Server site.
2. An error notification appears without providing any text.
3. The FileCloud user clicks OK in the error message dialog box and then exits FileCloud Drive.
4. The user tries to open FileCloud Drive again.
5. An error notification appears without providing any text.

#### Attempted Re-try with Admin Intervention

1. A new device using FileCloud Drive tries to login to the FileCloud Server site.
2. An error notification appears without providing any text.
3. The FileCloud user clicks OK in the error message dialog box and then exits FileCloud Drive.
4. The administrator logs on to the Admin Portal and deletes the device.
5. The user tries to open FileCloud Drive again.
6. An error notification appears without providing any text.



## Cause

This is a known issue when all of the following conditions are set:

Condition	For more information
The Administrator enables and configures two-factor authentication	<a href="#">➔ Enable Two-Factor Authentication</a>
The Administrator creates and configures a workflow to block client access	<a href="#">➔ Using Workflows</a>
You are running FileCloud Server version 18.1 or earlier	<a href="#">➔ FileCloud Server 18.1 Notes</a>

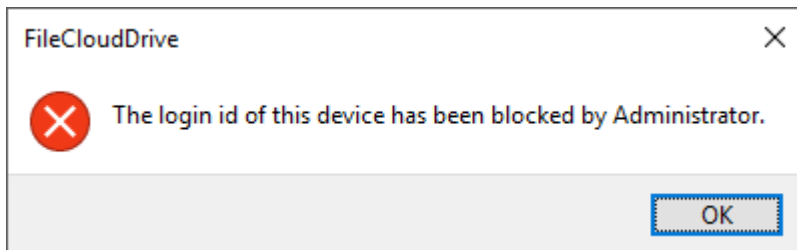
## Resolution

This issue is fixed in FileCloud Server 18.2.

When the following conditions occur:

- The Administrator enables and configures two-factor authentication
- The Administrator creates and configures a workflow to block client access
- You are running FileCloud Server version 18.2 or later

The FileCloud Drive user now sees the following error message with text:

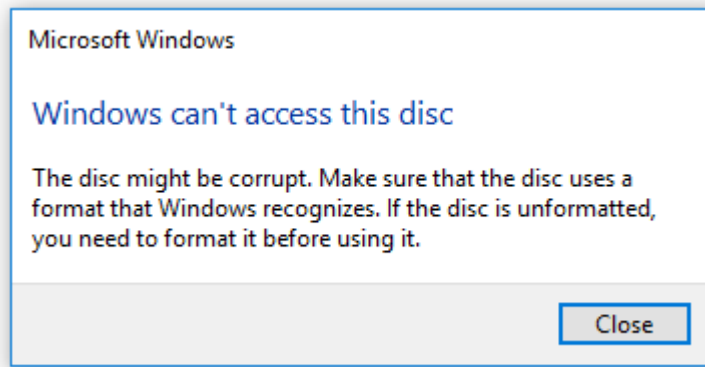


[➔ Upgrade FileCloud](#)

## Windows Can't Access This Disk in Drive

### Problem

FileCloud Drive users may see the following error message when connecting:



## Cause

In the following scenario:

1. The Administrator enables and configures two-factor authentication.
2. The Administrator creates and configures a workflow to block client access.
3. A new device using FileCloud Drive tries to login to the FileCloud Server site.
4. An error notification appears.

This error appears by design. It is the expected result when all of the following conditions are set:

Condition	For more information
The Administrator enables and configures two-factor authentication	<a href="#">➔ Enable Two-Factor Authentication</a>
The Administrator creates and configures a workflow to block client access	<a href="#">➔ Using Workflows</a>

## Resolution

Administrators can explain to the user why the device is blocked by their company policies.

## How to uninstall FileCloud Drive

FileCloud Drive can be uninstalled from Windows "Add/Remove Programs" widget.

## FileCloud Drive for Mac

**i** FileCloud Drive versions below 23.1.2 do not support macOS 14 (Sonoma). If you are using macOS 14, please install or upgrade to FileCloud Drive 23.1.2 or higher.

**i** FileCloud Drive versions below 22.1 do not support macOS Ventura. If you are using macOS Ventura, please install or upgrade to FileCloud Drive 22.1 or higher.

**i** FileCloud Drive version 21.1 and higher supports Catalina and Big Sur.

Please note that for Drive running on Apple Silicon M1, Big Sur 11.3 or higher is required and security settings have to be adjusted.

See [FileCloud Drive: Configuration for Big Sur 11.3 or later versions Running on Apple Silicon](#).

FileCloud Drive for Mac is a client application available for macOS (Catalina and later).

It allows you to access your FileCloud server files like you would access any other files in Mac through the Mac Finder. The files can be edited from and saved directly to your FileCloud server



## About FileCloud Drive for Mac

**i** Beginning with FileCloud 23.1, Drive for Mac includes [FileCloud for Office](#).

Although FileCloud Drive for Mac makes your remote FileCloud server files available as if it is a local drive in your MacOSX Computer, it is important to understand the underlying technology powering FileCloud Drive so that you can use it most efficiently for its intended purpose.

FileCloud Drive for Mac provides a virtual view to your FileCloud files and makes it appear as if the files are actually local, but in reality they are not. The files are present on the remote server and if the underlying network connection is not available, FileCloud Drive for Mac cannot work. So in cases when you are going to be offline and want access to your files, FileCloud Drive for Mac is not a suitable tool and it is recommended to use the FileCloud Sync app instead which keeps a copy of the remote server files locally on your computer.

Also, note that when you have a large file (for example, 1 GB) and you try to open it in an application via FileCloud Drive for Mac, it will first have to be downloaded from the remote connection and then opened. Depending upon your network connectivity this could take a while. So even though these files appear connected to your MacOSX, they are in reality in the FileCloud server.

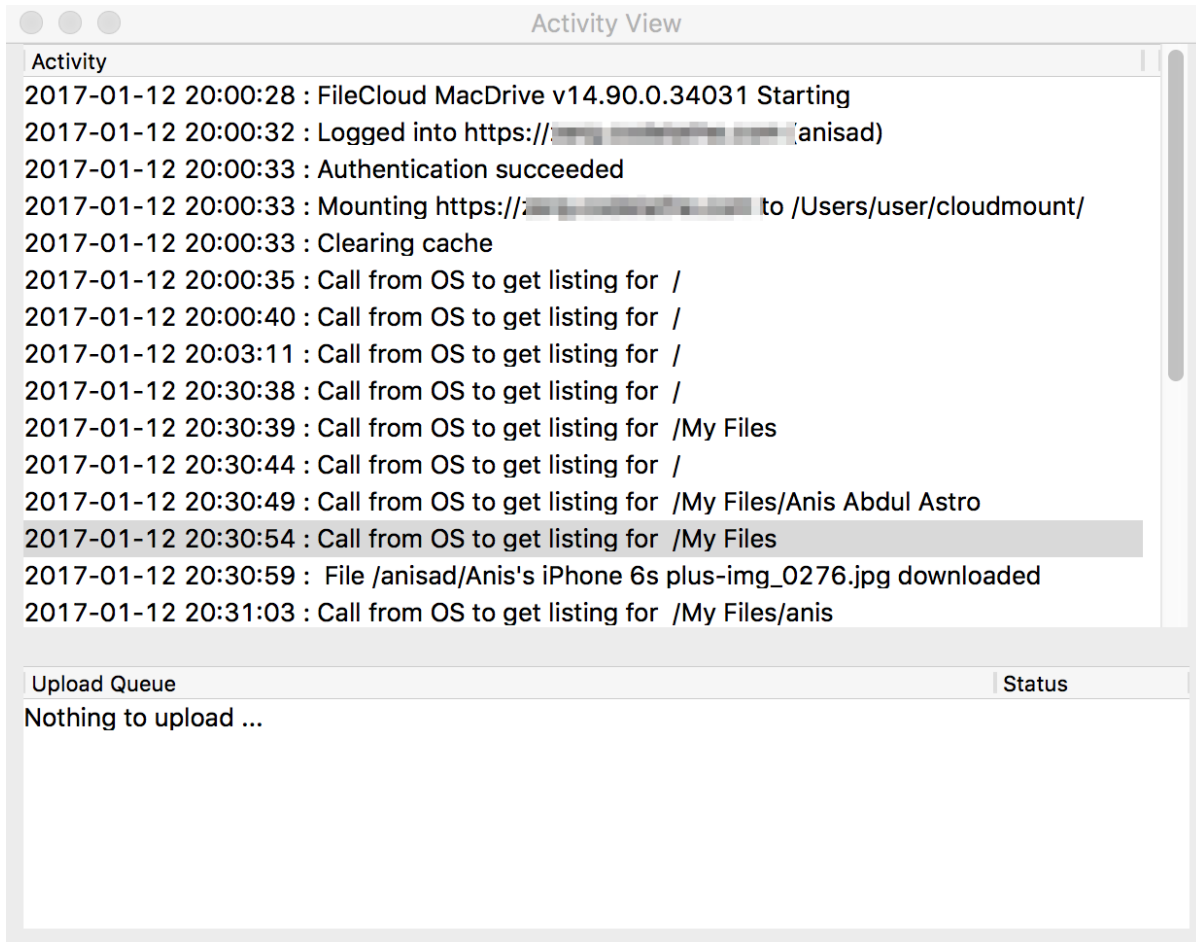
So it is best to use FileCloud Drive for Mac to work with small to medium sized files, to edit documents and use it for uploading small number of files or downloading small documents etc. FileCloud Drive for Mac is more convenient than using the web portal to edit files because it avoids downloading the file first, editing and then re-uploading it back. This

can be done seamlessly by just opening the document in the application via explorer, editing and then saving it to upload it back to the FileCloud.

## Viewing FileCloud Drive for Mac Activity

FileCloud Drive for Mac provides a way that shows the activities being performed by FileCloud Drive for Mac and this provides "under the hood" view.

Select the "View Activity" option in FileCloud Drive for Mac task bar menu



## How to install FileCloud Drive for Mac

**⚠ Current FileCloud Drive users (DocIQ users):** Later this year, DocIQ will be deprecated, and FileCloud will no longer support it. Although you can continue to use DocIQ, we recommend using FileCloud for Office, which can be downloaded from the Office add-ins store. Now, when you upgrade FileCloud Drive, you are given the choice of using FileCloud for Office or continuing to use DocIQ. If you choose to use FileCloud for Office, please see the [Using FileCloud for Office with Drive](#) documentation.

**i** FileCloud Drive versions below 23.1.1 do not support macOS 14 (Sonoma). If you are using macOS 14, please install or upgrade to FileCloud Drive 23.1.2.

**i** FileCloud Drive versions below 22.1 do not support MacOS Ventura. If you are using MacOS Ventura, please install or upgrade to FileCloud Drive 22.1.

FileCloud Drive version 21.1 and higher supports Catalina and Big Sur.

Please note that for Drive running on Apple Silicon M1, Big Sur 11.3 or higher is required and security settings have to be adjusted.

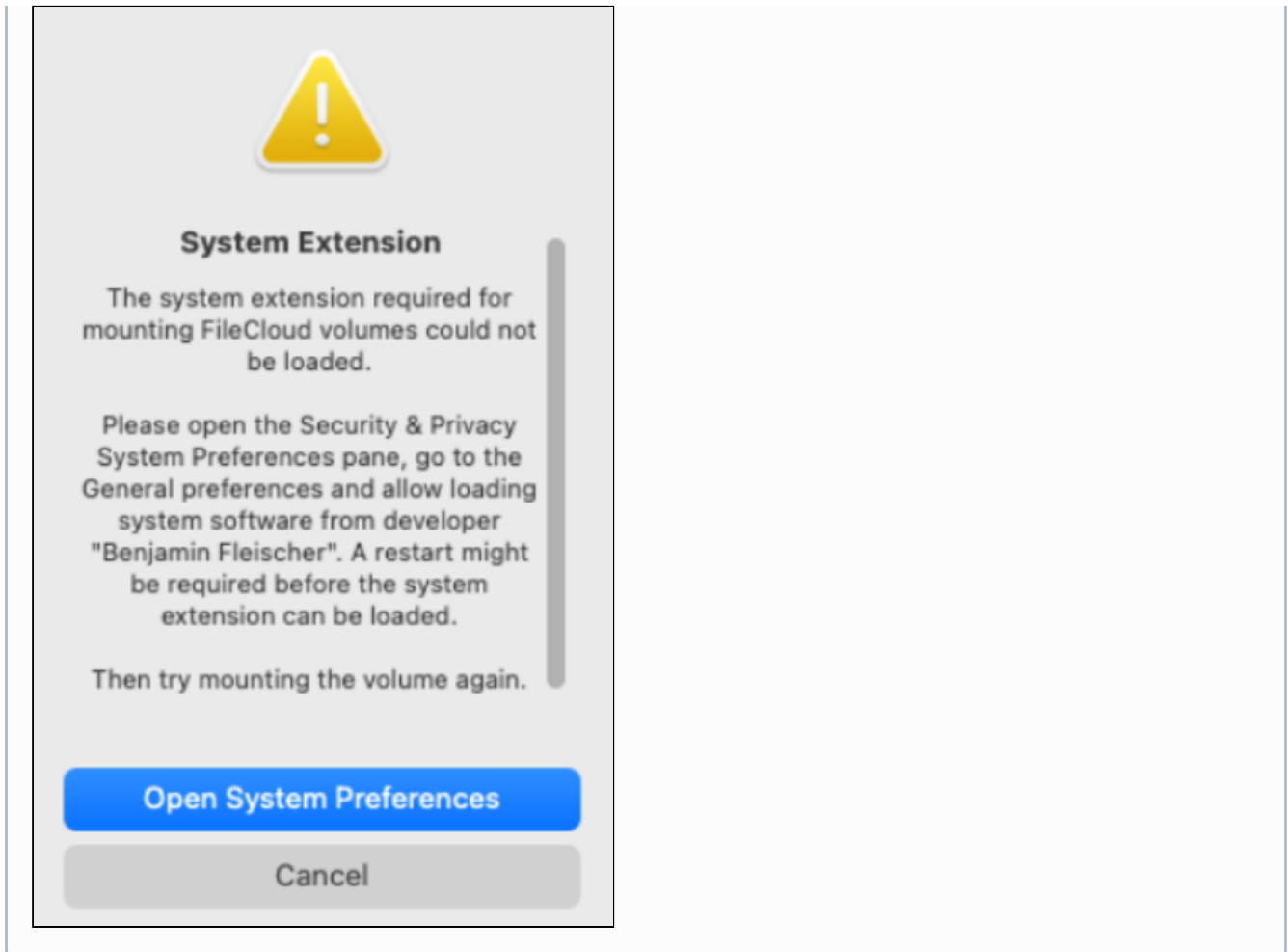
See [FileCloud Drive: Configuration for Big Sur 11.3 or later versions Running on Apple Silicon](#)

## To Install FileCloud Drive for Mac

1. Install the FileCloud Drive for Mac application from this [download](#).
2. Once installed, launch FileCloud Drive for Mac from your applications folder.

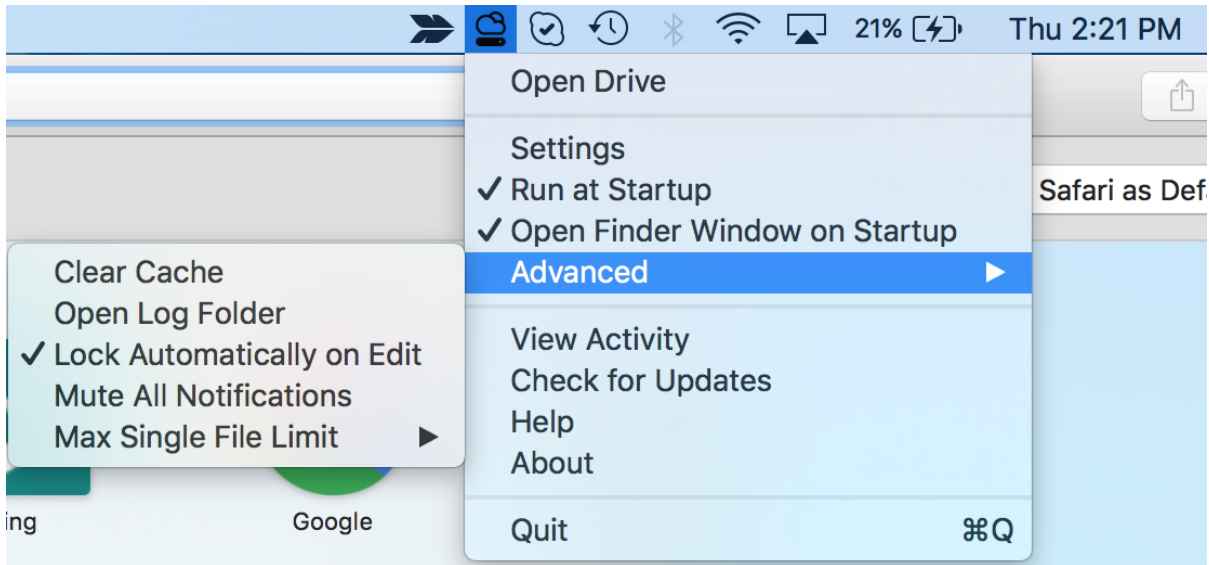
If you are using Mac OS Big Sur, and you have trouble opening documents after installing or updating FileCloud Drive, please [Contact FileCloud Support](#).

When you open Drive, if the following message pops up, follow its instructions, restart your system if necessary, and then re-open Drive.



## FileCloud Drive for Mac Menu Options

This section describes the various menu options in FileCloud Drive for Mac.



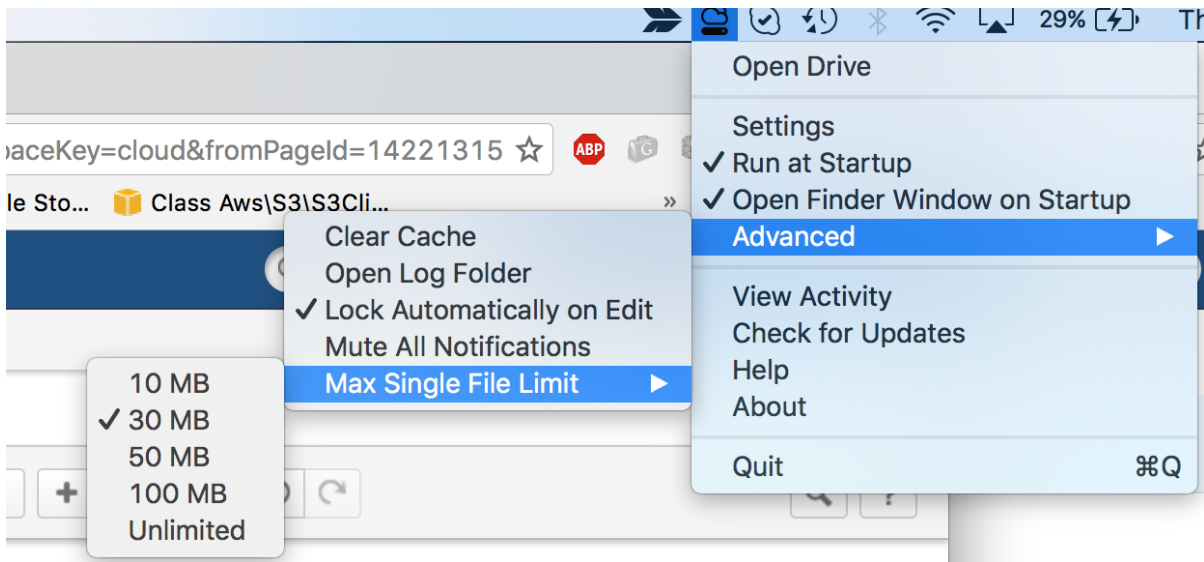
<b>Open Drive</b>	This will launch a finder window to the mounted drive volume. If the remote server is not available or configured then nothing will be launched
<b>Settings</b>	This will display the dialog window to input new server information. If a server is already mounted, then it will be first unmounted and the new server will be mounted.
<b>Run at Startup</b>	This will start FileCloud Drive for Mac automatically when the user logs into the computer.
<b>View Activity</b>	Open a window that shows the current activity as well as transfer details
<b>Check for Updates</b>	This will check if there is a newer version of FileCloud Drive for Mac is available
<b>Help</b>	Launch browser to open online documentation
<b>About</b>	Display version information
<b>Exit</b>	Unmount and exit FileCloud Drive for Mac application

<b>Clear Cache</b>	FileCloud Drive for Mac stores locally accessed file in a local cache. This cache location will be cleared when this option is selected and the volume will be remounted. Any further access to files will cause FileCloud Drive for Mac to download it first. Care must be taken to make sure there are no existing application are actively using files during this operation.
<b>Open Log Folder</b>	This option will launch explorer window to the location containing FileCloud log files. This is used for debug purposes.
<b>Lock Automatically on Edit</b>	This option will lock a file on file open action and will unlock a file on file cloud action. <b>NOTE this function is a file system level behaviour and FileCloud Drive CANNOT KNOW IF A FILE IS OPENED IN AN APPLICATION AFTER THE CONTENTS ARE READ.</b> This also attempts to detect special cases such as Microsoft Office apps and will attempt to keep the lock enabled when a document file is edited but changes in behaviour to MS Office apps can affect this algorithm.
<b>Mute All Notifications</b>	FileCloud Drive for Mac will try to show notifications on various conditions and selecting this option will prevent those notifications from being displayed
<b>Max Single File Limit</b>	FileCloud Drive for Mac will cache a file locally when windows explorer requires it (Typically Finder will try to pre-cache files for quicker access or to display thumbnails or previews). The files are also cached on file open/copy operations. This option will set a limit to max file size that can be accessed. This is primarily meant to manage bandwidth usage .

## How Can I Increase File Size Limits for FileCloud Drive for Mac?

FileCloud Drive for Mac downloads a file from server before it can be read/modified/updated FileCloud Drive for Mac. MacOSX can prefetch files to improve user experience and can request files that are not actively used . This can sometimes cause bandwidth usage. To limit this, FileCloud Drive for Mac has maximum file size limit setting to prevent downloading large files. This limit is set to 30MB by default. You can change this value from the FileCloud Drive for Mac context menu.





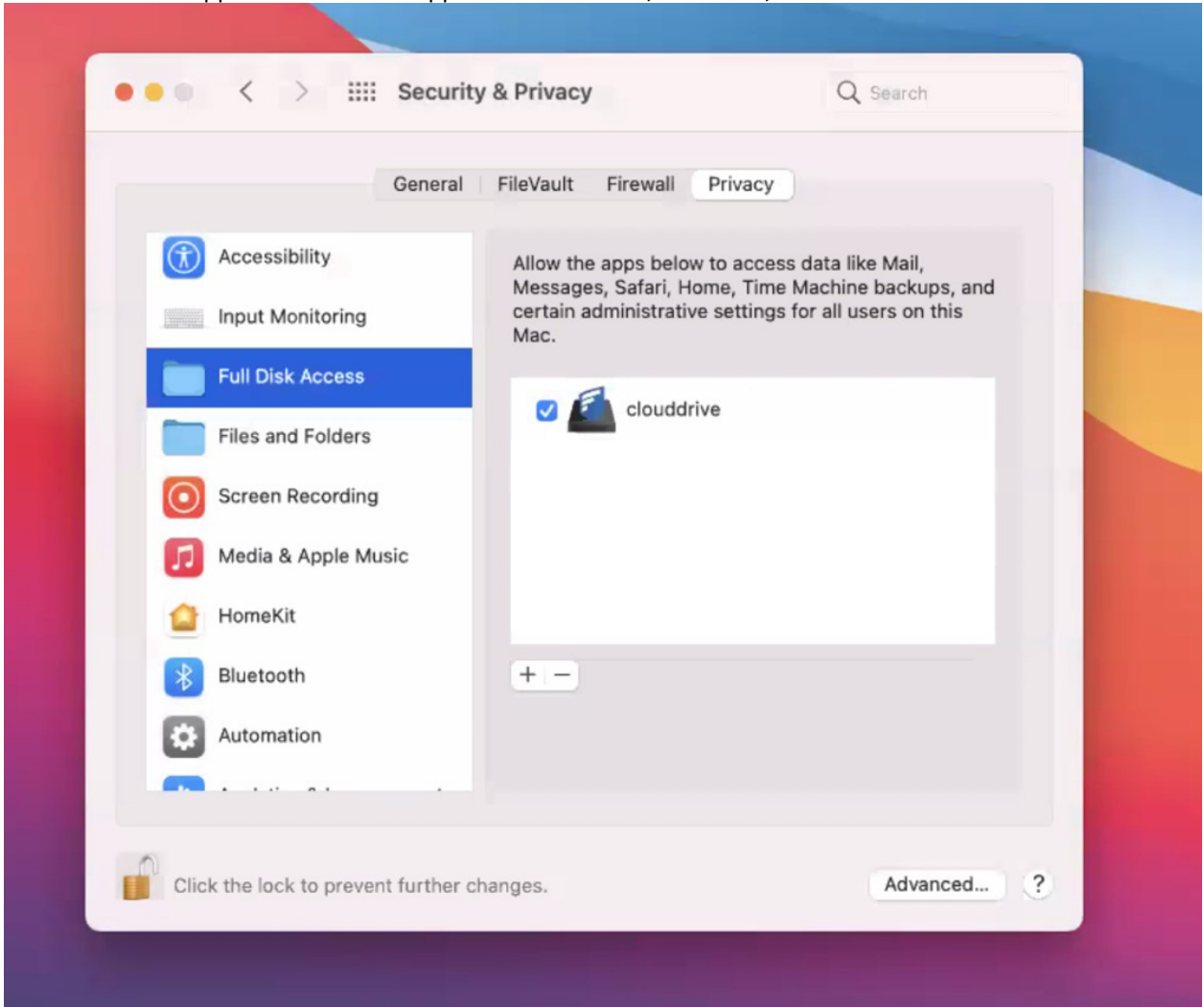
## How to Fix Problems Uploading Large Files

If you are trying to upload a file of 3-5 GB to Drive for Mac and see an error message or a Waiting to Start message that doesn't disappear, you may be able to resolve the problem by granting Drive full disk access.

To enable full disk access:

1. Go to **System Preferences > Security and Privacy**.
2. Click the **Privacy** tab.
3. Click **Full Disk Access** in the left panel.

4. If the **CloudDrive** application does not appear in the window, click the +, and add it.



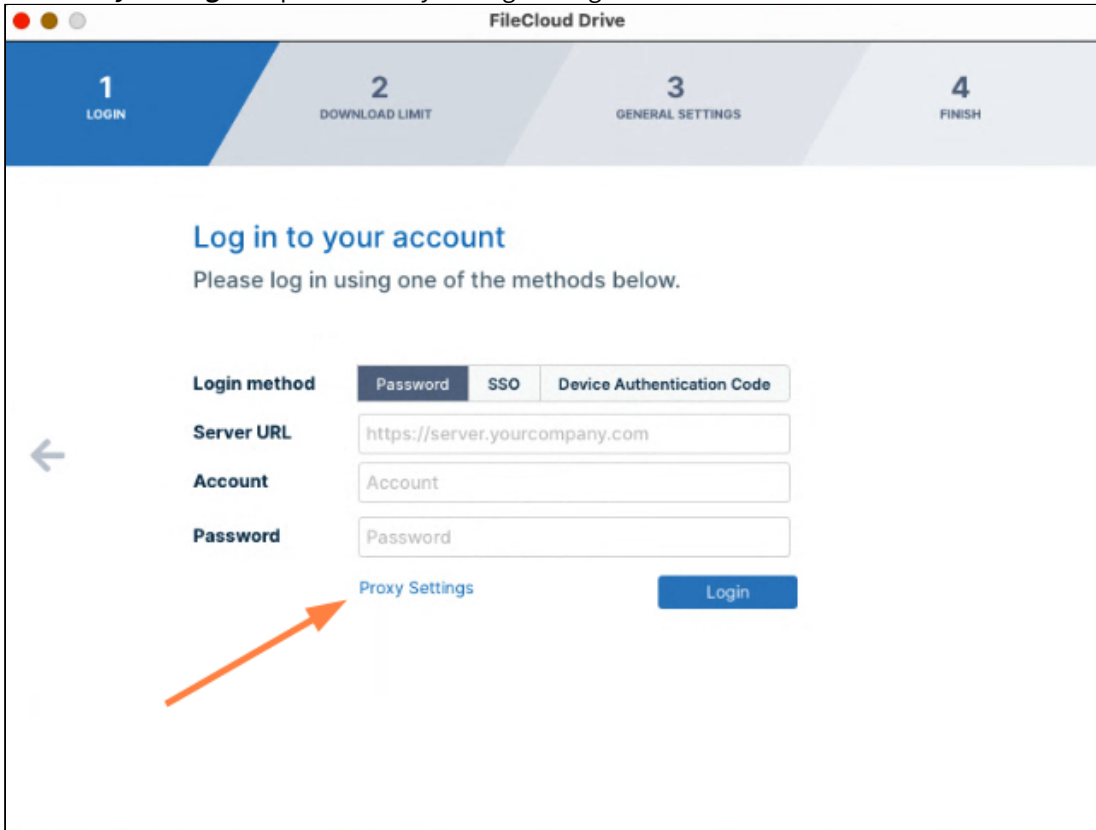
Drive now has full disk access.

## Proxy Server for FileCloud Drive for Mac

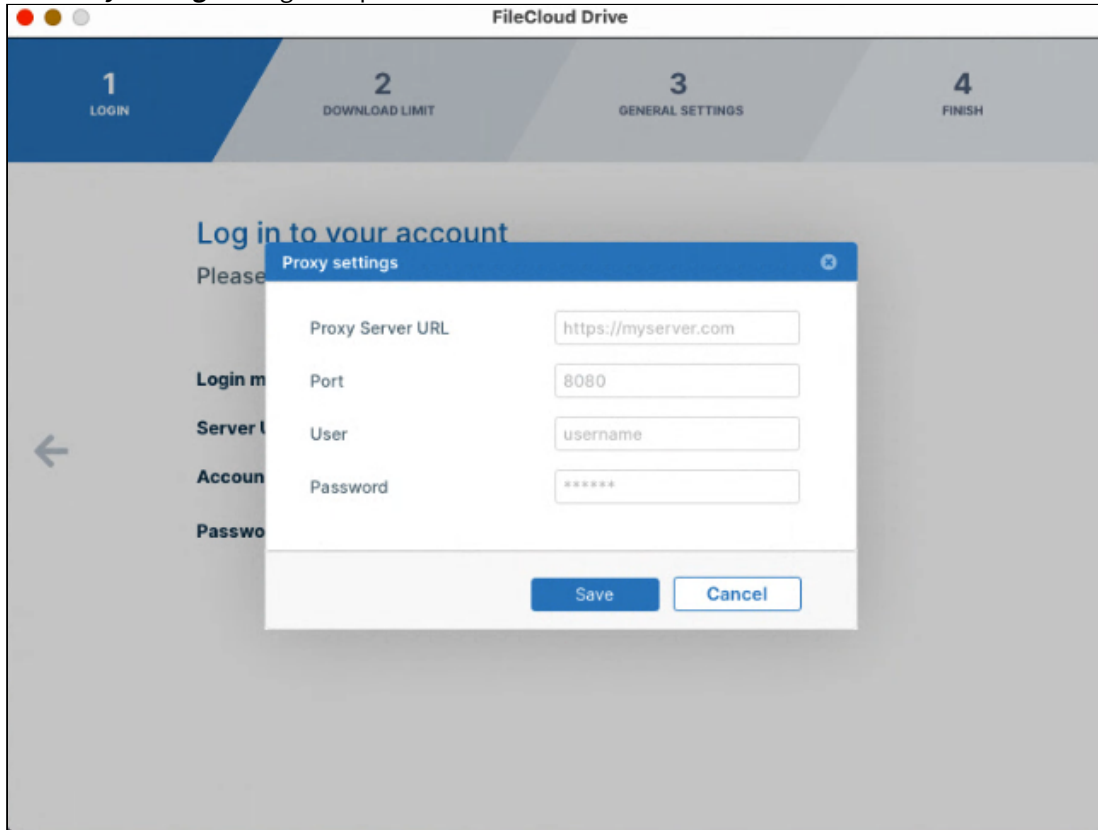
FileCloud Drive for Mac can use proxy server to connect with FileCloud server.

The information should be supplied when you log in to Drive for Mac.

1. Click **Proxy Settings** to open the Proxy settings dialog box.



The **Proxy settings** dialog box opens.



2. Fill in the fields and click **Save**.
3. To log in to FileCloud, click **Login**.

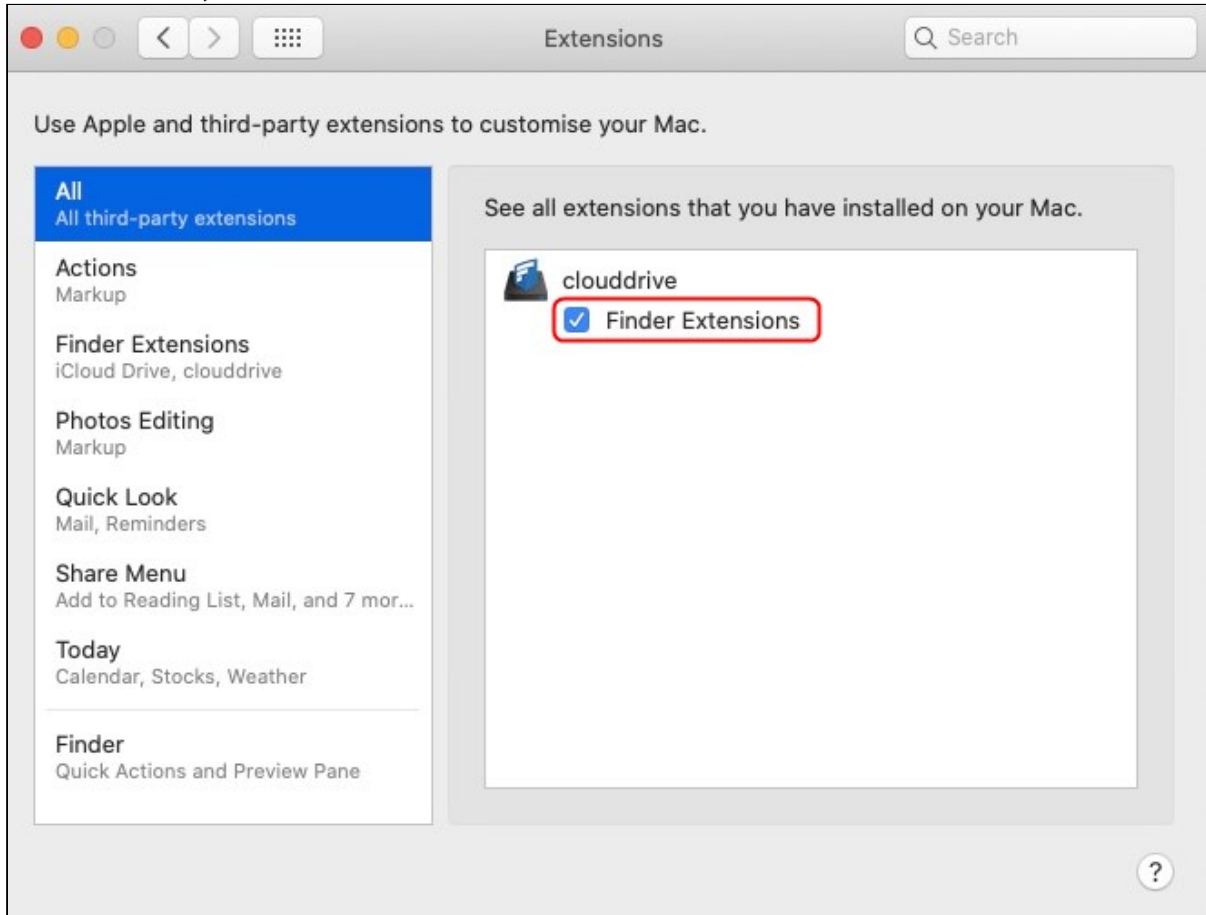
## Enable Right-Click Support in Drive for Mac

Starting in FileCloud Version 20.1, you can enable right-click support in Drive for Mac.

### To enable right-click support in Drive for Mac:

1. Start FileCloud Drive for Mac.
2. Click the Apple logo in the top left corner of the page and choose System Preferences > Extensions.
3. In the left pane, click **All**.

- Under **clouddrive**, check the box for **Finder Extensions**.



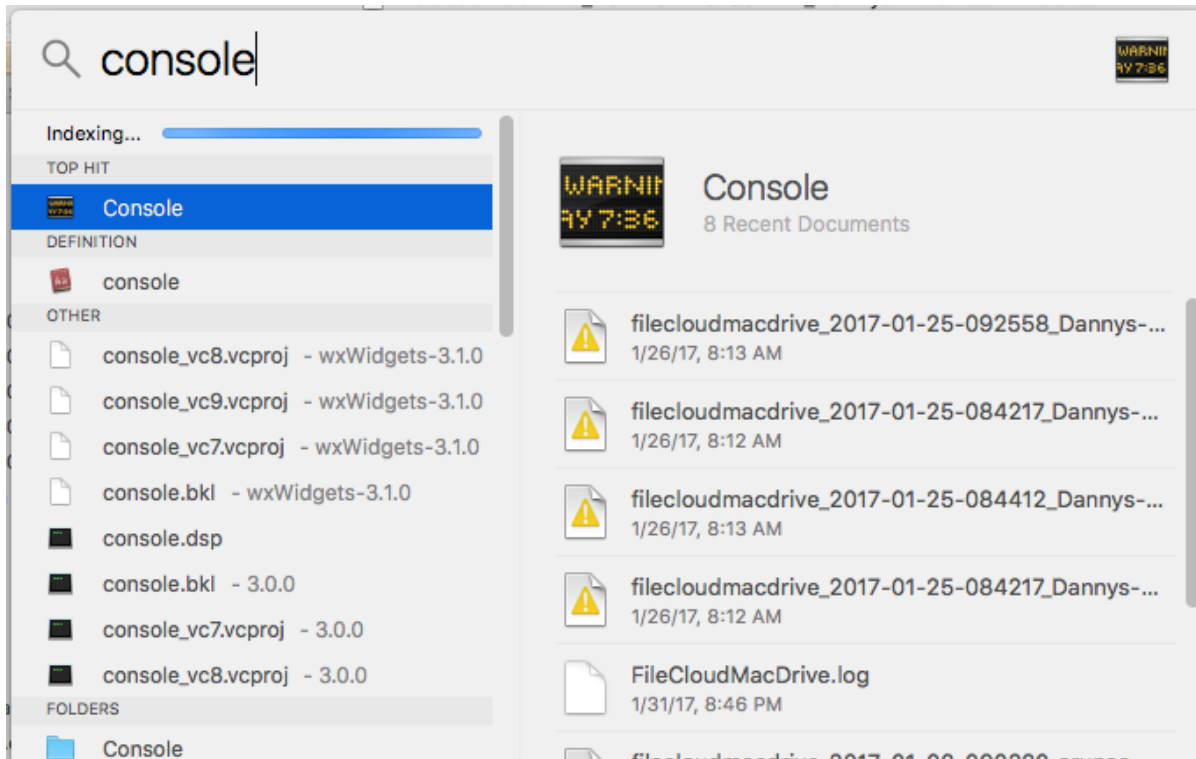
- To relaunch Finder, click the Apple logo in the top left corner of the page and choose Force Quit -> Finder -> Relaunch.
- Restart your computer.
- Start FileCloud Drive for Mac again.

## Viewing a Crash Report for Drive for Mac

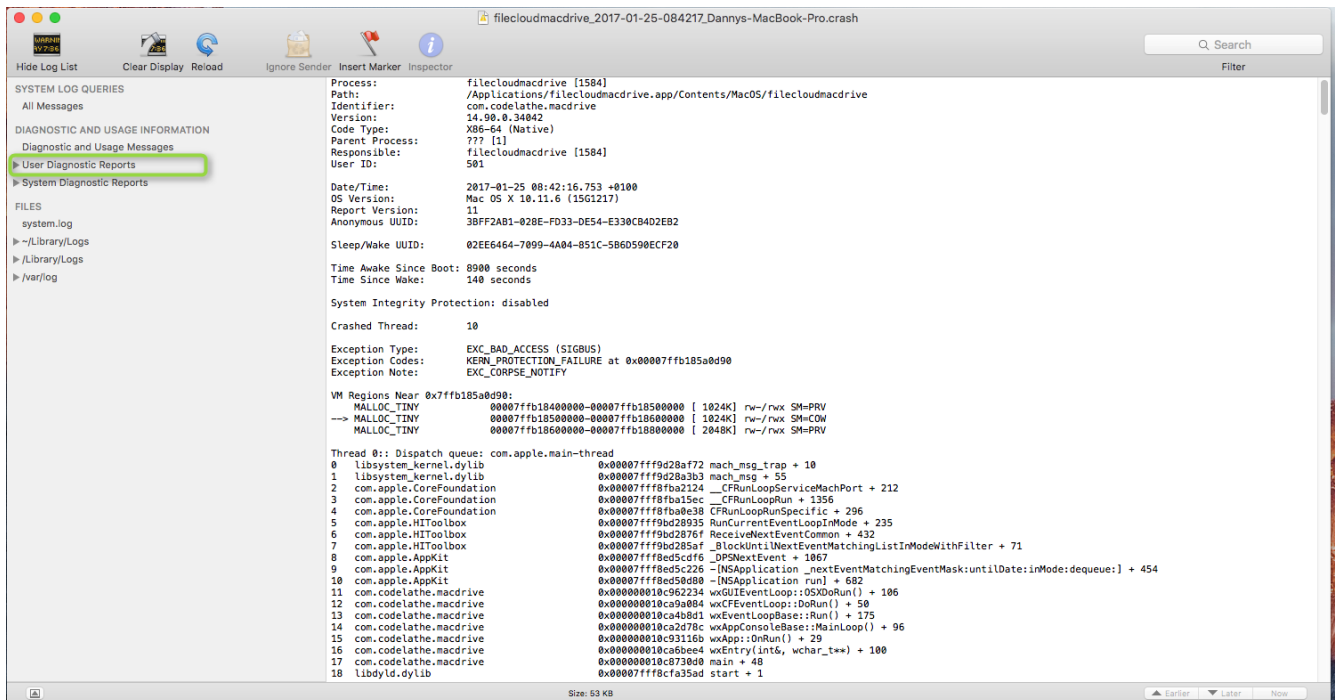
In addition to log file, if the app exits without user intervention, a crash report file is also very useful.

To get the crash report file:

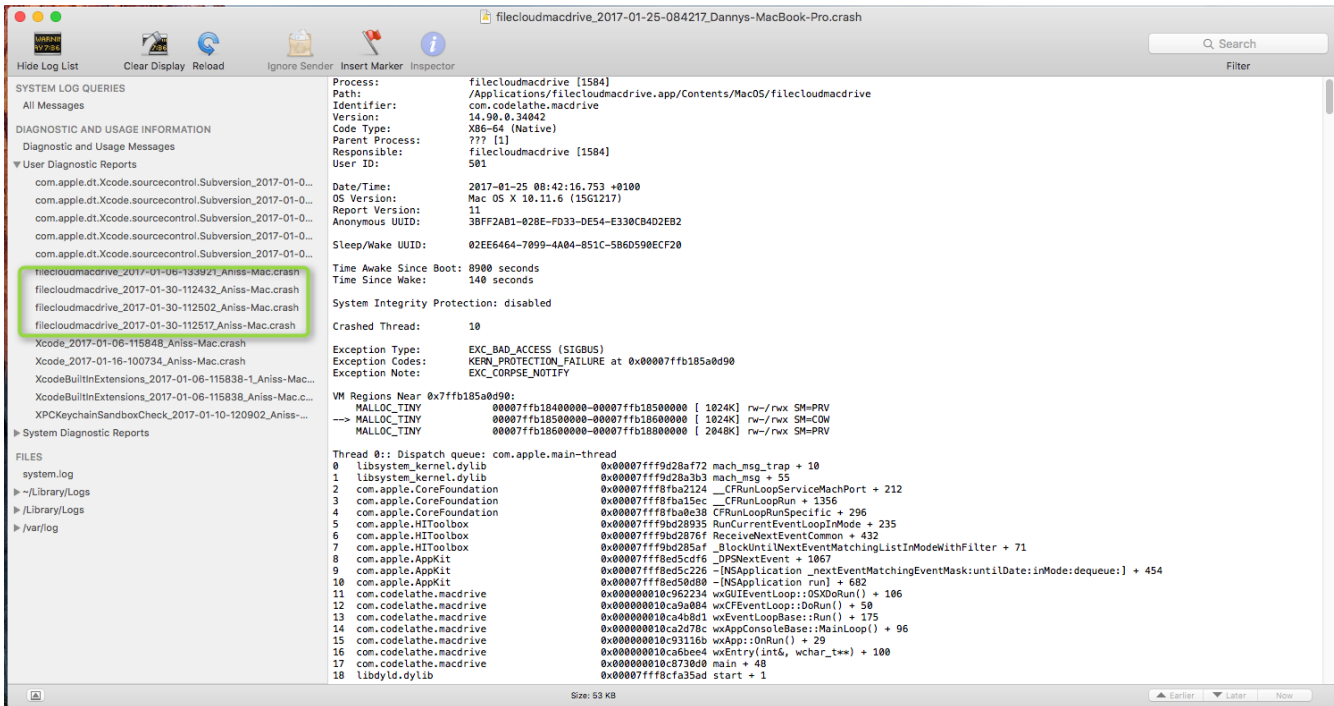
- In the Spotlight window, type "console"



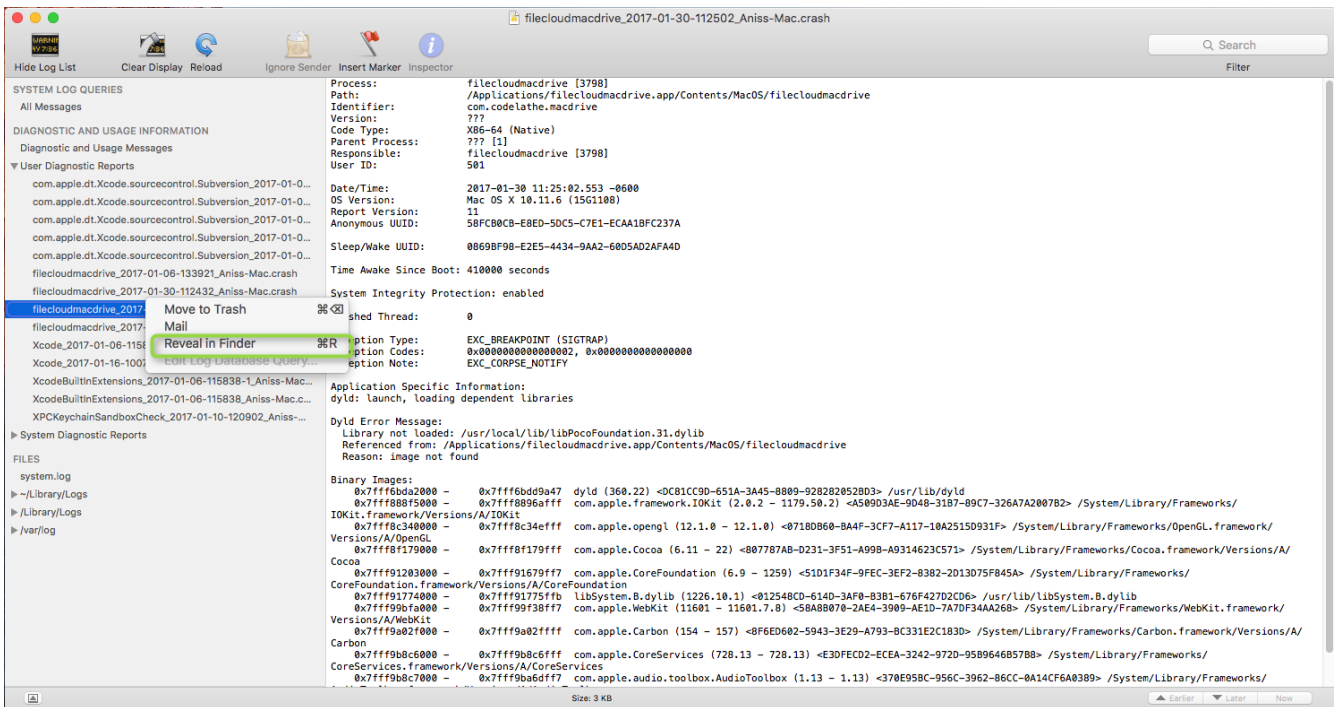
## 2. Locate the "User Diagnostic Reports" section.



## 3. Expand the User Diagnostic Reports section and locate the report that starts with "filecloudmacdrive" and the latest time stamp.



4. Right click the report and select "Reveal in Finder" and email that file.



## FileCloud Drive: Configuration for Big Sur 11.3 or later versions Running on Apple Silicon

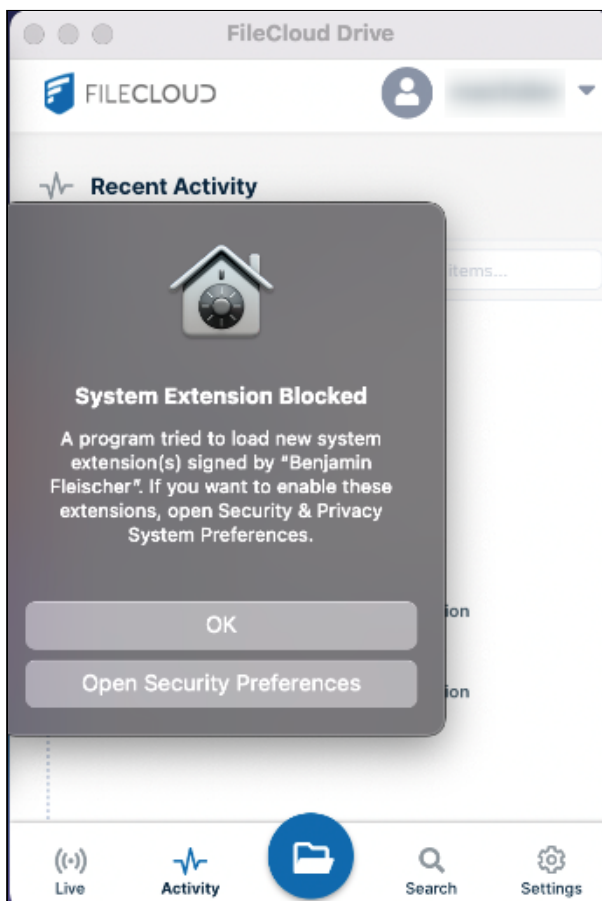
- i** Beginning in FileCloud Version 21.1, Drive supports using Big Sur versions 11.3 and higher. However, you must configure a workaround for FileCloud to run the kernel extension (kext) that Drive uses. Note that prior to version 21.1, Drive does not support Big Sur 11.3 or later versions.

### To configure FileCloud Drive to use Big Sur 11.3 or later versions running on Apple Silicon:

1. Follow the instructions in macOS User Guide to [change the level of security used on your startup disk](#) to **Reduced Security**.
2. [Install Drive for Mac](#).

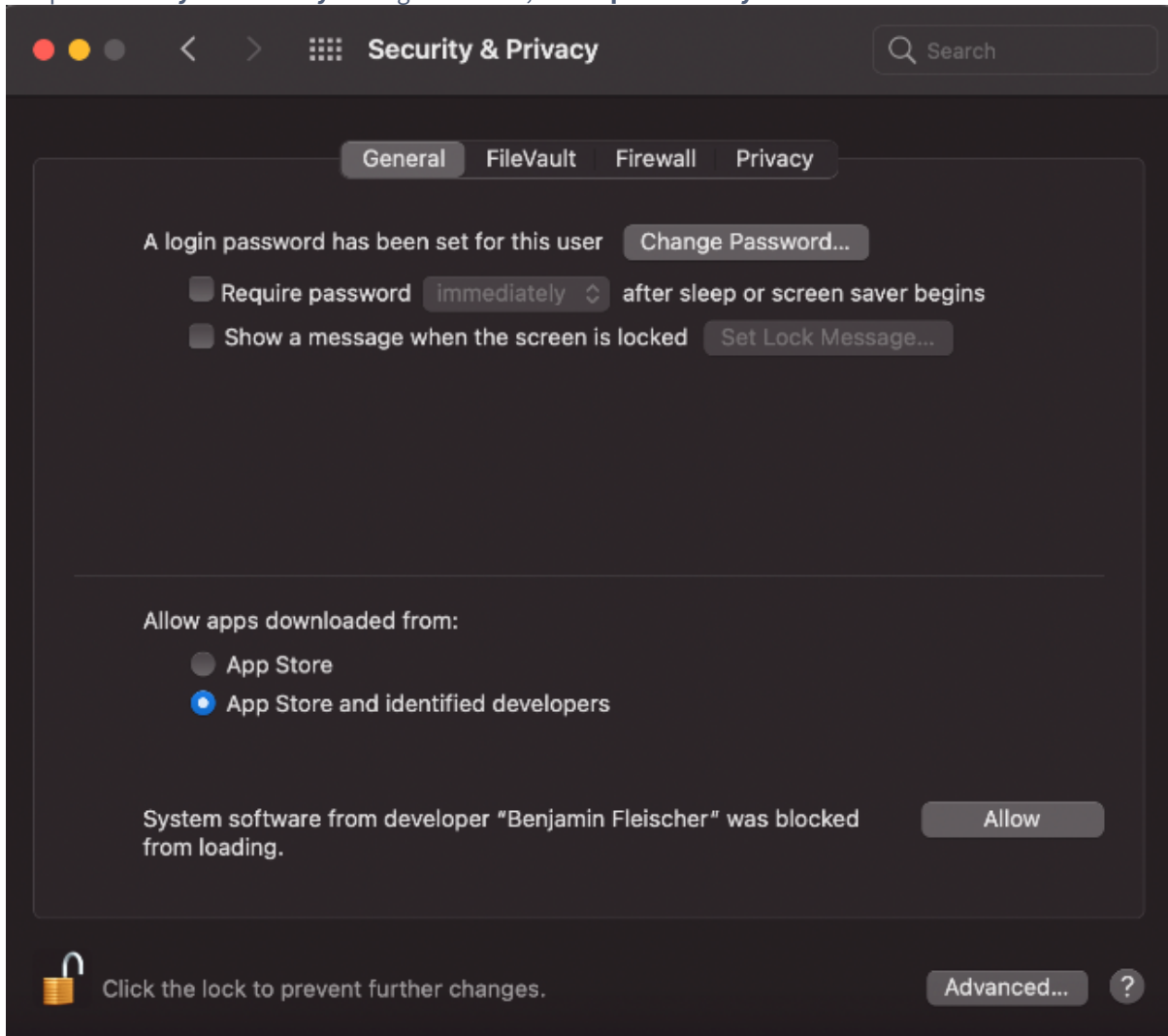
When Drive attempts to start, the message **System Extension Blocked** appears.

- i** **Note:** If you see the message, "**FileCloudDrive**" can't be opened because Apple cannot check if for **malicious software**, see the workaround below.

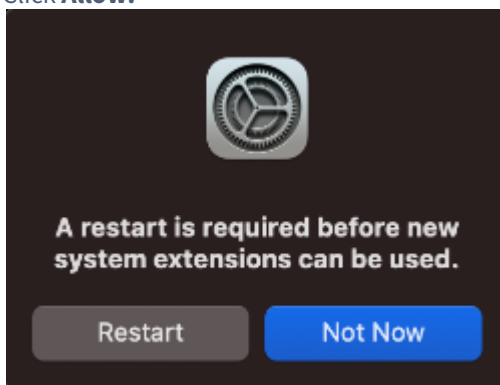




- To open **Security and Privacy** settings in MacOS, click **Open Security Preferences**.



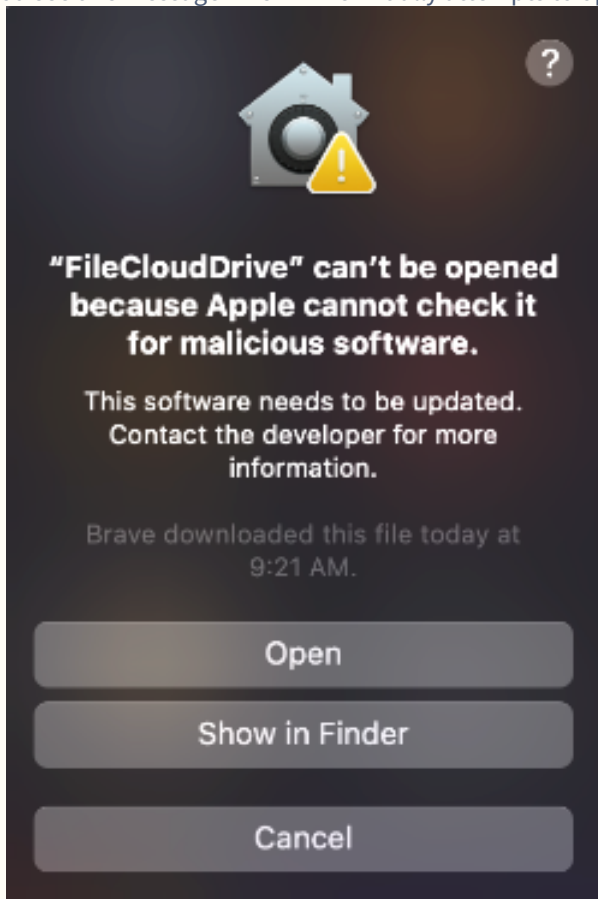
- Click **Allow**.



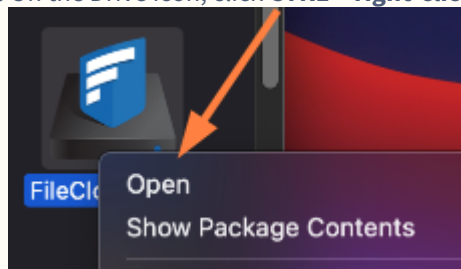
- Click **Restart**.
- When MacOS restarts, you can start Drive normally.

### ⚠️ Workaround

If you see this message when Drive initially attempts to open:



a. On the Drive icon, click **CTRL + right-click** and choose **Open**.



Drive opens.

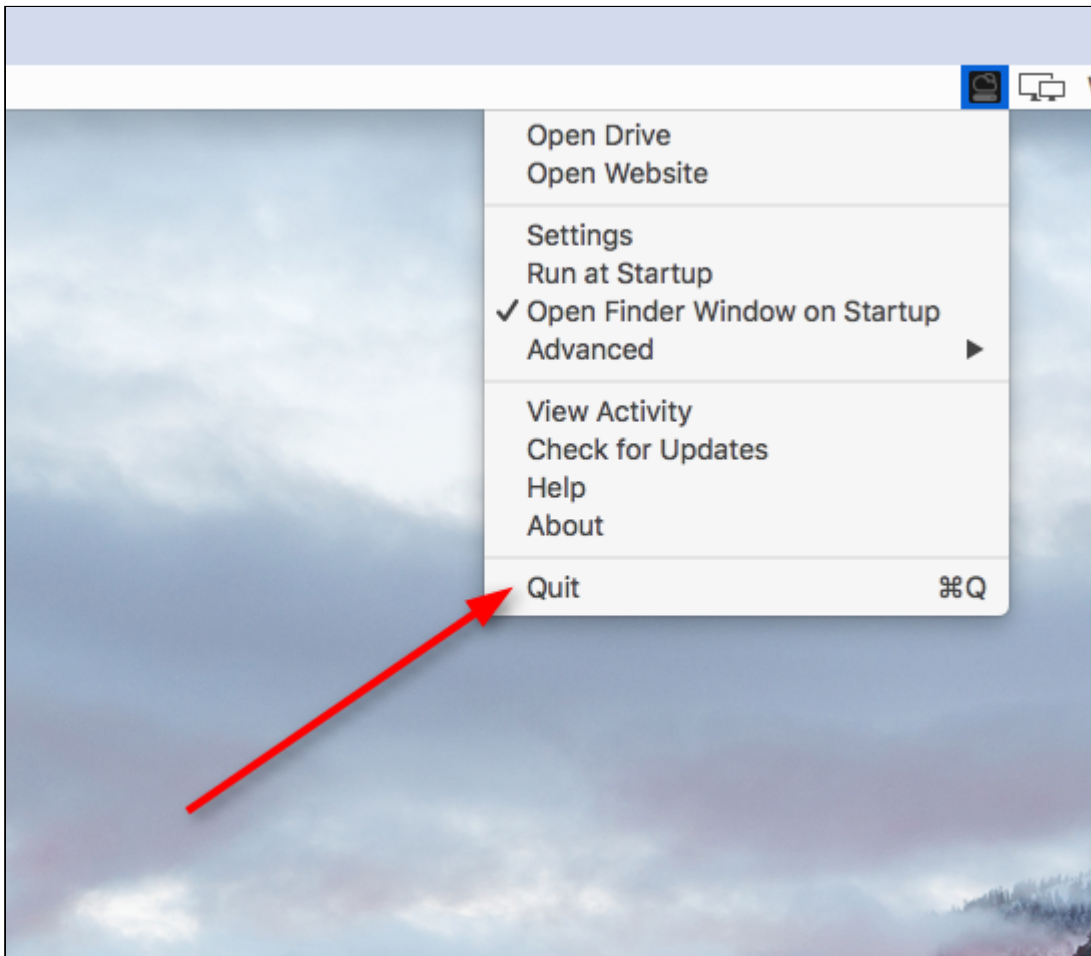
b. Reboot your system.

c. Attempt to open Drive again.

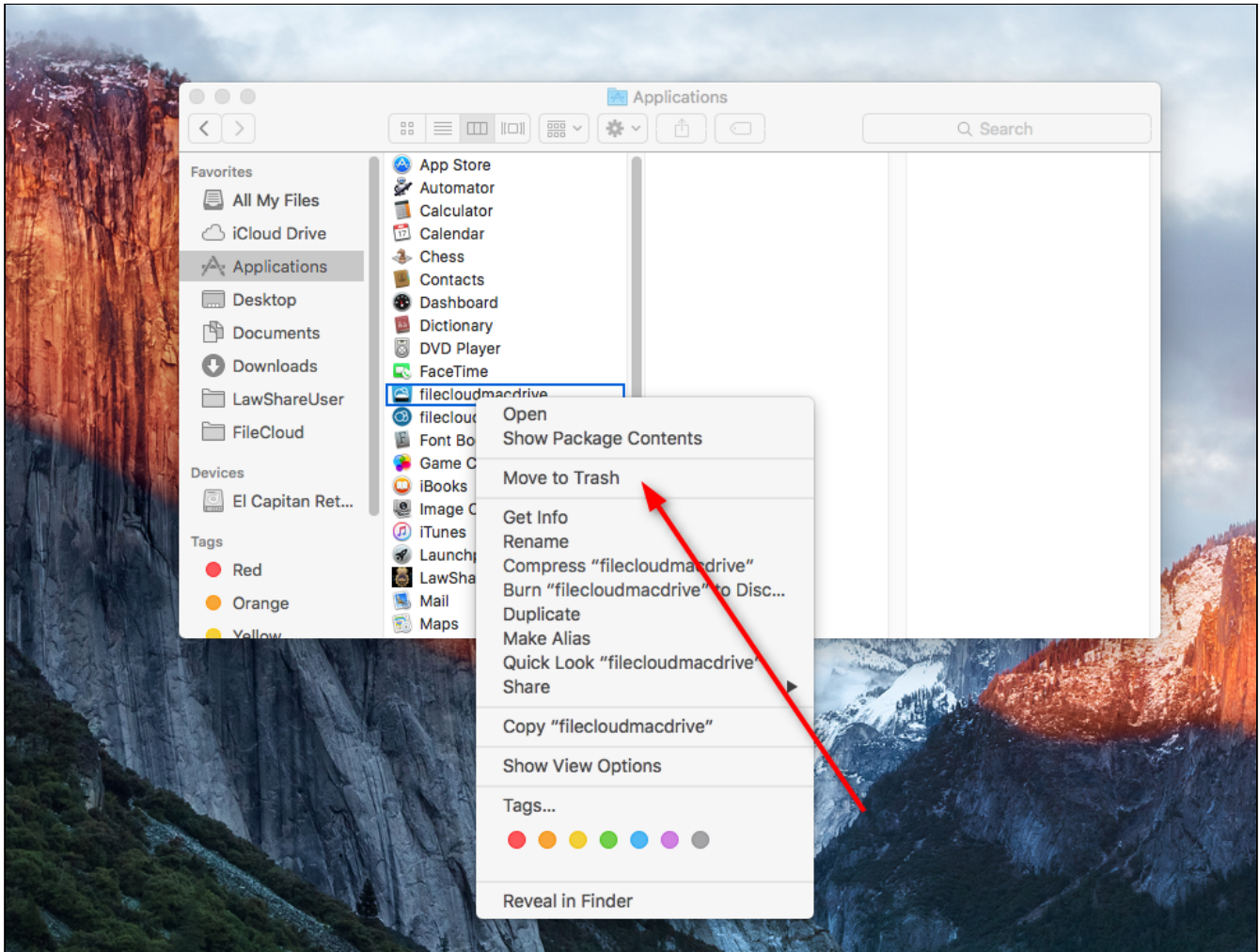
You should now see the **System Extension Blocked** message shown in Step 2, above, and can proceed to Step 3.

## How to uninstall FileCloud Drive for Mac

To uninstall FileCloud Drive for Mac, first you have to quit the Drive app.



Then navigate to Applications, select Filecloud Drive for Mac and click Move to Trash.



To clear the data of FileCloud Drive for Mac, please [Contact FileCloud Support](#).

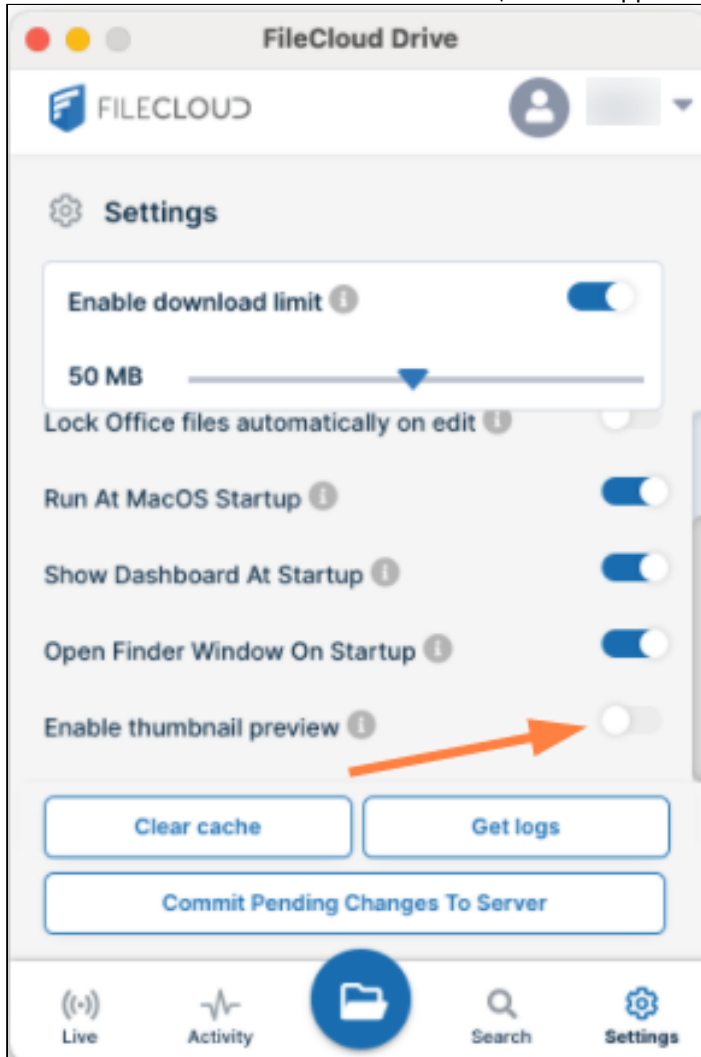
## Enabling Thumbnail Previews in Drive for Mac

Drive for Mac must download all content within a folder in order to generate a thumbnail. To avoid potential performance issues, thumbnail previews are disabled by default in Drive for Mac, and files are only downloaded when selected. However, thumbnail previews may be enabled in Drive for Mac manually.

To enable thumbnail previews in Drive for Mac:

1. Log in to Drive for Mac.
2. At the bottom of the Drive dashboard, click the **Settings** button.

3. Click the **Enable Thumbnail Preview slider** (so that it appears blue).



## FileCloud Add-In for Microsoft Outlook

FileCloud Outlook add-in brings the powerful features of filesharing to the Windows desktop and Outlook. The Outlook add-in enables the user to:-

1. Share a file or folder that resides in FileCloud directly from Outlook.
2. Upload a file to FileCloud and share directly from Outlook.
3. Ability to share a FileCloud file as an email attachment or generate a link.

This seamless integration with MS Outlook will improve the efficiency and productivity of any Outlook user when sharing files or folders within the organization or with 3<sup>rd</sup> party vendors. Therefore, the Outlook add-in brings FileCloud to the email platform and integrates cloud access in the user's workflow.

## System Requirements

OS: Windows 7 and above

Outlook: 2007 and above

.NET Framework: 4.5 and above

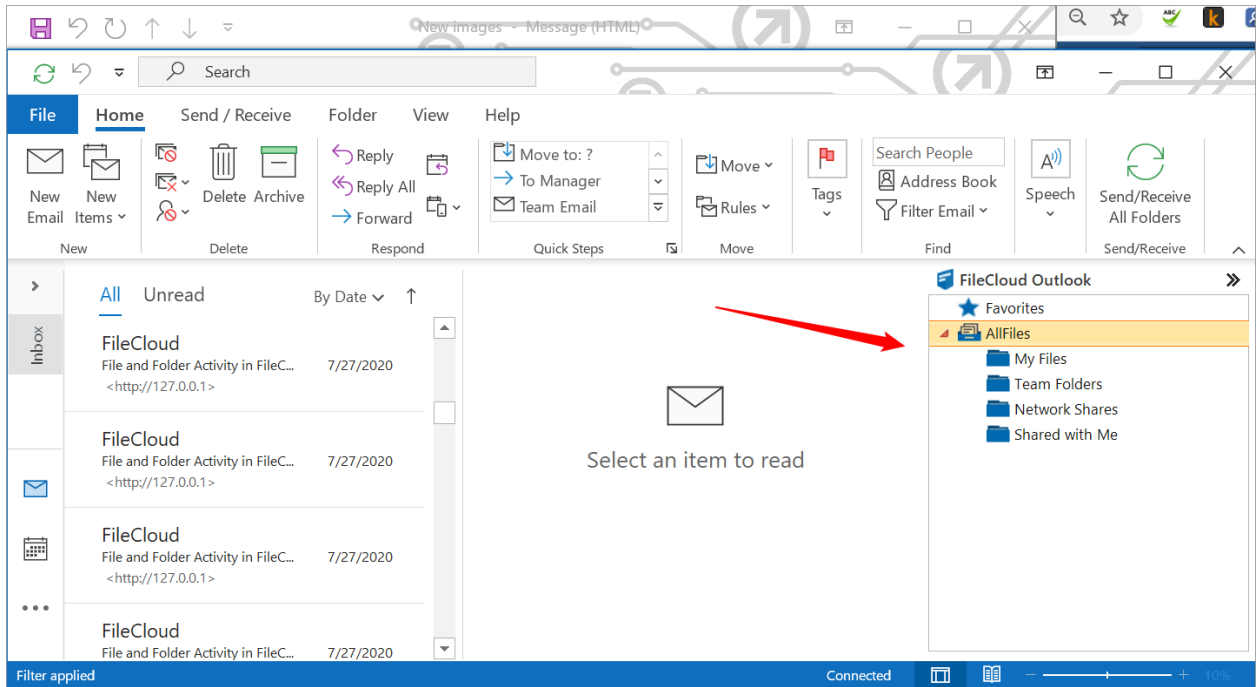
Admin Privileges are required to complete the installation

## Installation

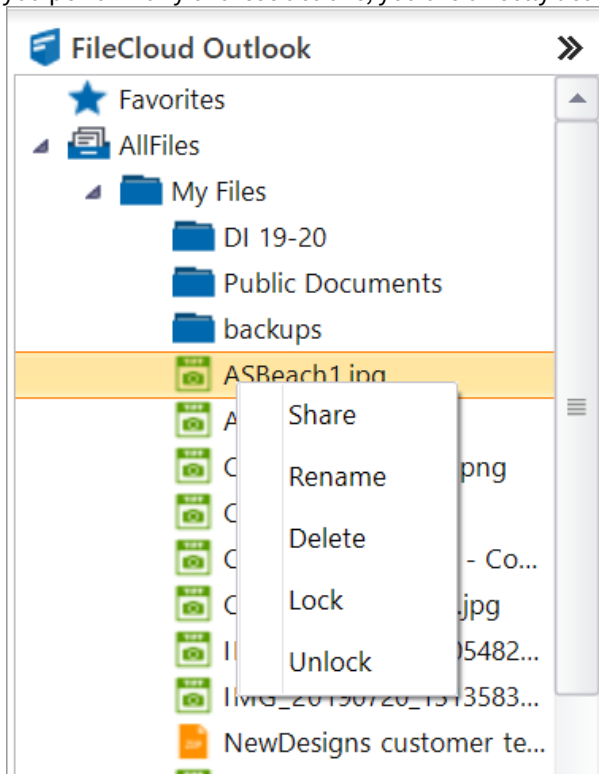
1. Download and install the FileCloud Outlook Add-In through this link: [Outlook Add-In Download](#).
2. Accept any security warnings and continue installation.
3. Admin privileges are required to complete the installation.
4. The add-in will be installed under program files and will be installed for all users in that system.
5. Once installation is complete, please restart Outlook.

Once installed

- In versions 20.2 and higher of FileCloud, a FileCloud explorer appears in the right panel of Outlook. The explorer enables you to work remotely with your FileCloud files and folders from Outlook.



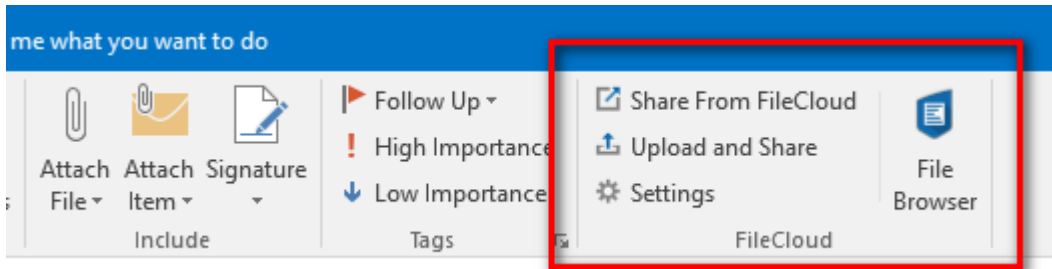
When you right-click on a file in the explorer, a menu with the actions [Share](#), [Rename](#), [Delete](#), [Lock](#) and [Unlock](#) opens. You can also drag an attachment from a message, and drop it into **My Files** or a folder in **My Files**. When you perform any of these actions, you are directly acting on the files in FileCloud.



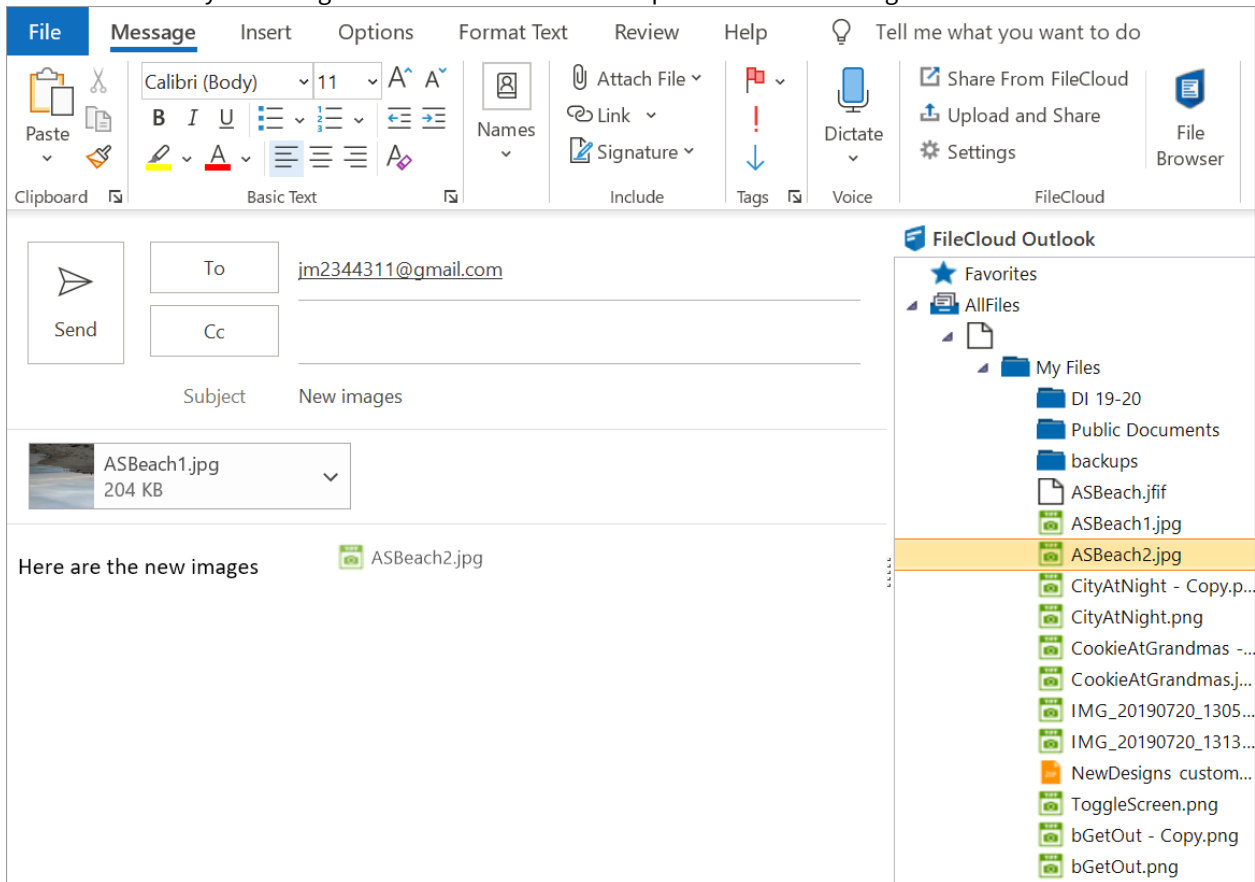
## When you create new email

When you create a new message in Outlook, FileCloud appears in the Outlook ribbon in the message with the following buttons:-

- **Share from FileCloud**
- **Upload and Share**
- **Settings**
- **File Browser**



In Versions 20.2 and higher of FileCloud, the FileCloud explorer also appears when you open the new message box. This enables you to drag a file from FileCloud and drop it into a new message as an attachment.



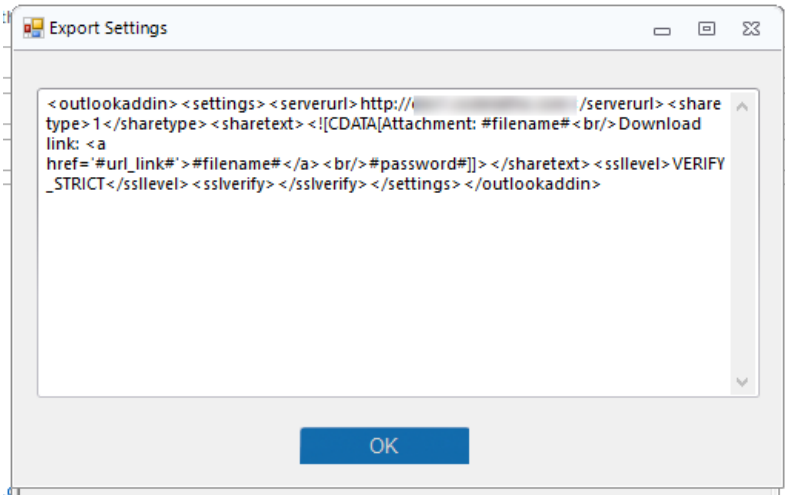


As in the FileCloud explorer in the main Outlook window, when you right-click on a file, a menu with the actions [Share](#), [Rename](#), [Delete](#), [Lock](#) and [Unlock](#) options opens.

## Settings

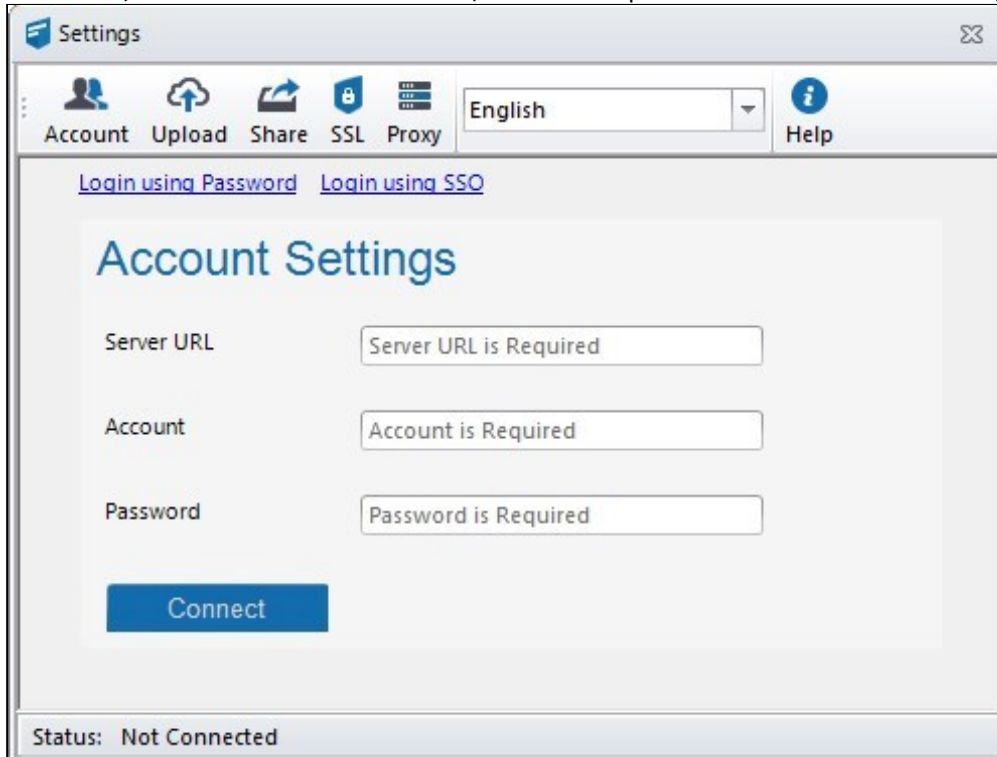
The settings link opens a dialog box that enables you to configure settings and helps you to troubleshoot.

Settings	Description
Account Settings	Sign in to FileCloud by entering the FileCloud Server URL, username and password. The Outlook add-on also supports single sign-on (SSO).
Upload Settings	Set the default upload folder for all files that are uploaded. Allow auto-upload of attachments.  NOTE: To enable/disable auto-upload of attachments, Outlook must be restarted after the setting is changed.

Settings	Description
Share Settings	<p>Set the following settings:-</p> <ol style="list-style-type: none"> <li>1. Send File Share as link or attachment.</li> <li>2. Insert share detail at end of the email body or at the top of the email body.</li> <li>3. Default Share Type - Public Share or Password Protected Share.</li> <li>4. Share Text in HTML - The text that is added to the email body with the share link when the share is created.</li> </ol>
SSL Settings	<p><b>Ignore SSL Errors</b> and <b>Connect to Only TLS 1.2 Server</b> (applicable when your FileCloud server is supporting only TLS 1.2)</p>
Proxy Settings	<p>Enter settings for proxy server, if any.</p>
Language Support	<p>English, Dutch, and Arabic are supported. To make the language change effective, you must restart the Outlook add-in.</p>
Help	<p>Display the FileCloud Version.</p> <p>Troubleshooting - Open the Log Folder where the add-in stores its activity logs</p> <p>Export Settings - Create a well formatted XML of settings. Ideally, admins can create the settings, export them as XML and use the XML file for Mass Deployment using Device Management.</p>  <p>The screenshot shows a dialog box titled "Export Settings" with a text area containing the following XML code:</p> <pre>&lt; outlookaddin&gt; &lt; settings&gt; &lt; serverurl&gt; http://[redacted] /serverurl&gt; &lt; share type&gt; 1&lt;/sharetype&gt; &lt; sharetext&gt; &lt;![CDATA[Attachment: #filename#&lt;br/&gt; Download link: &lt;a href=' #url_link#'&gt;#filename#&lt;/a&gt; &lt;br/&gt;#password#]]&gt; &lt;/sharetext&gt; &lt; ssllevel&gt;VERIFY _STRICT&lt;/ssllevel&gt; &lt; sslverify&gt; &lt;/sslverify&gt; &lt;/settings&gt; &lt;/outlookaddin&gt;</pre> <p>For more detailed support on export settings, please see <a href="#">Centralized Device Management</a></p>

## Account Settings

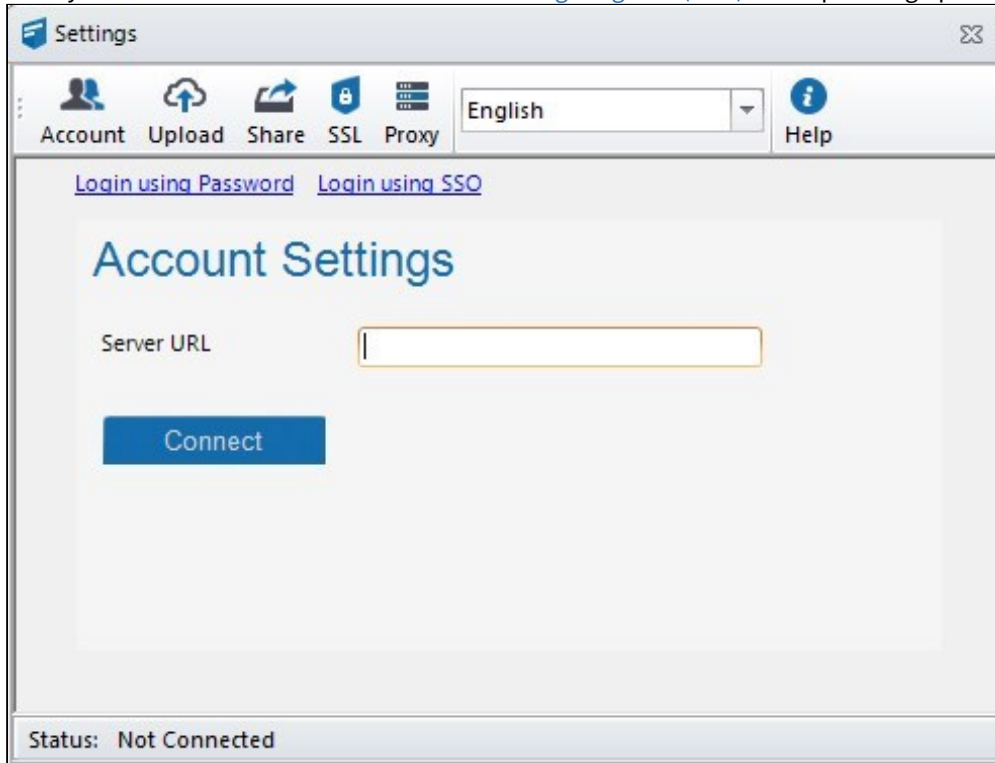
On this tab, enter the FileCloud server URL, account and password and click **Connect** to sign in to FileCloud.



The screenshot shows a 'Settings' dialog box with a title bar and a close button. The main area contains a navigation bar with icons for 'Account', 'Upload', 'Share', 'SSL', and 'Proxy', a language dropdown menu set to 'English', and a 'Help' button. Below the navigation bar are two links: 'Login using Password' and 'Login using SSO'. The main content area is titled 'Account Settings' and contains three input fields: 'Server URL' with the placeholder text 'Server URL is Required', 'Account' with 'Account is Required', and 'Password' with 'Password is Required'. A blue 'Connect' button is positioned below these fields. At the bottom of the dialog, a status bar displays 'Status: Not Connected'.

To log in with SSO, click **Login using SSO**.

Enter your **Server URL** and click **Connect**. See [Single sign-on \(SSO\)](#) for help setting up SSO.



## Upload Settings

You can set **Default Upload Folder** and allow auto-upload of file attachments that are greater than a certain size. Please note that auto-upload of attachments requires that you restart Outlook.

**Default Upload Folder** designates the FileCloud folder that uploads are saved in. If a default folder is not designated, you are prompted for an upload folder path when uploading a file.

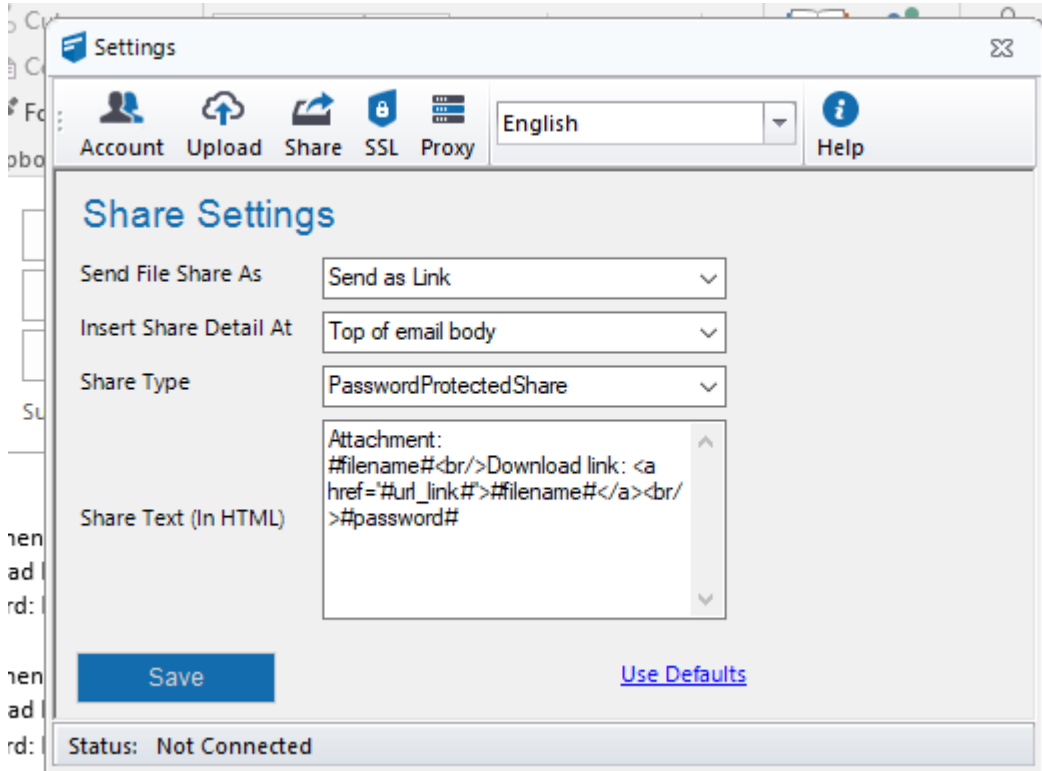
You can set default values for **Auto Upload Attachments** and **Auto Upload Attachments Greater than Size (MB)** by going to **Settings > Policy** and in the **Device Configuration** tab for the policy, setting up xml parameters. See [Device Configuration XML For Outlook Add-in](#) for help.

## Share Settings

Share settings are used when a share is created and sent through Outlook.

Setting	Description and options
Send File Share As	<ul style="list-style-type: none"> <li>Send As Link: Share created will be sent as link.</li> <li>Send As Attachment: Share created will be sent as an attachment.</li> </ul>
Insert Share Detail At	<p>Allows you to set the default position of the share detail in the email body.</p> <ul style="list-style-type: none"> <li>Top of email body</li> <li>End of email body</li> </ul>
Share Type	<p>Set the default share type when shares are created.</p> <ul style="list-style-type: none"> <li>Public Share (Default)</li> <li>Password Protected Share</li> </ul>

Setting	Description and options
Share Text (In HTML)	<p>Text added to the email body that defines the share link. HTML may be included to format this text.</p> <p>Default: Attachment: #filename#&lt;br/&gt;Download link: #url#&lt;br/&gt;#password#</p> <p>The following place holders are available.</p> <ol style="list-style-type: none"> <li>1. #filename# refers to the File/Folder name of the shared item.</li> <li>2. #url# refers to the full url with HTML tags, for example &lt;a href='http://xyz.codelathe.com/url/ererrer'&gt;http://xyz.codelathe.com/url/ererrer&lt;/a&gt;</li> <li>3. #url_link# refers to full url with no HTML tags, for example <a href="http://xyz.codelathe.com/url/ererrer">http://xyz.codelathe.com/url/ererrer</a></li> <li>4. #password# refers to the share password for a password protected share.</li> </ol> <p>The default Share Text "Attachment: #filename#&lt;br/&gt;Download link: #url#&lt;br/&gt;#password#" results in the following text:</p> <p>Attachment: winter.docx  Download link: <a href="https://xyz.codelathe.com/url/42wfc8ertwqs">https://xyz.codelathe.com/url/42wfc8ertwqs</a>  Password: lkre431sq</p> <p>Attachment: #filename#&lt;br/&gt;Download link: &lt;a href='#url_link#'&gt;#filename#&lt;/a&gt;&lt;br/&gt;#password# results in:</p> <p>Attachment: spring.docx  Download link: spring.docx  Password: by1rgCx31</p>



## Proxy Settings

Proxy settings must be set when your network uses a proxy server or you would like the FileCloud Outlook Plugin to use a proxy server. You must contact your network administrator to get the Proxy Server address, port, username and password.

## Create a share in a new message

When you create a FileCloud share in Outlook, you can add the share link to your Outlook message either:

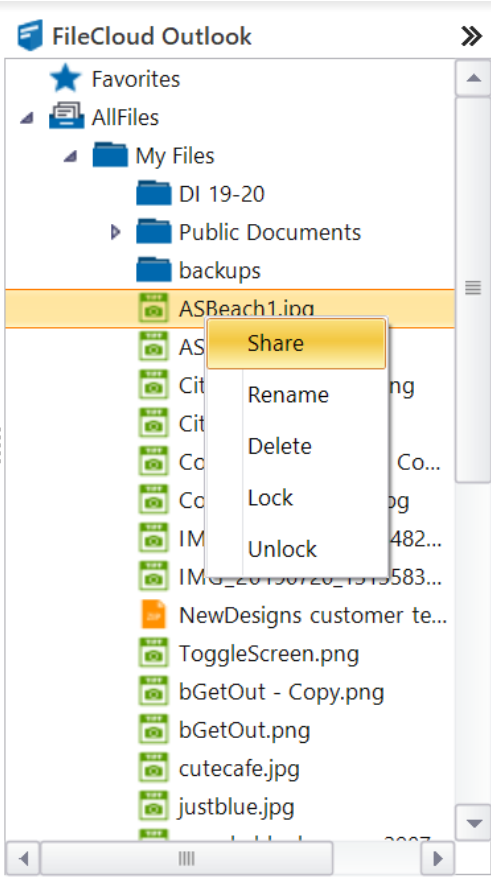
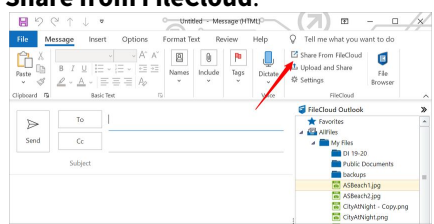
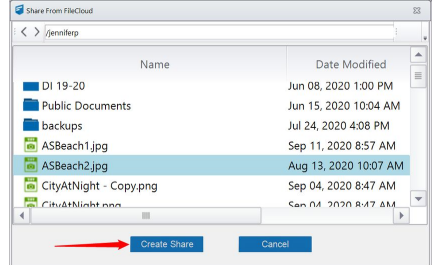
- by right-clicking on the file in the FileCloud explorer in the right-panel
- by clicking the **Share from FileCloud** link in the ribbon of the new email.

Both give you the same option of adding the share as a link in the email.

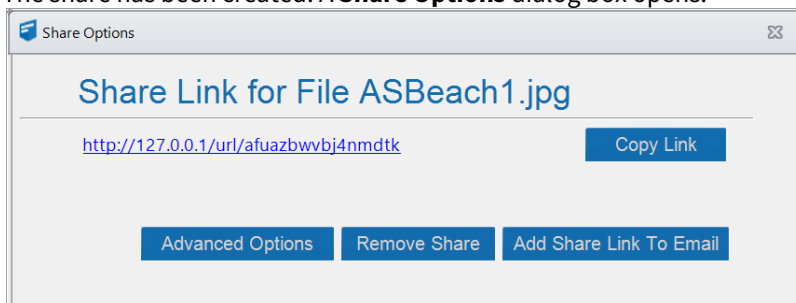
**i** When you create a share in a message, you have the option of adding it as a link or an attachment to the message. By default, it is added as a link. To add it as an attachment, click **Settings** in the ribbon above the message and change the setting in the **Share** window of the **Settings** box to **Send as Attachment**. See [Share Settings](#), above.

### To add a share in a new message:

1. Open Outlook and click **New Email**.  
A new email form opens.
2. Create a share in one of the following ways:

From the FileCloud explorer in the message box	From the Share from FileCloud link in the ribbon of the message box
<p>a. In the FileCloud explorer in the right-panel of the email form, navigate to the file or folder that you want to share, and right-click it.</p> <p>b. In the menu, choose <b>Share</b>.</p> 	<p>a. In the ribbon above the form, click <b>Share from FileCloud</b>.</p>  <p>A <b>Share from FileCloud</b> dialog box that displays your FileCloud folders opens:</p>  <p>b. Navigate to the file or folder that you want to share, select it, and click <b>Create Share</b>.</p>

The share has been created. A **Share Options** dialog box opens:





3. Choose one of the following options (or x out of the **Share Options** dialog box to keep the share without including it in the email or adding advanced options):
- **Copy Link** - Copy the link so that you can paste it somewhere else.
  - **Advanced Options** - When you first click the **Advanced Options** button, you see advanced options for public shares:

The screenshot shows the 'Advanced Share Options' dialog box. It has a title bar with a close button. The main content area is titled 'Advanced Share Options' and contains the following fields and controls:

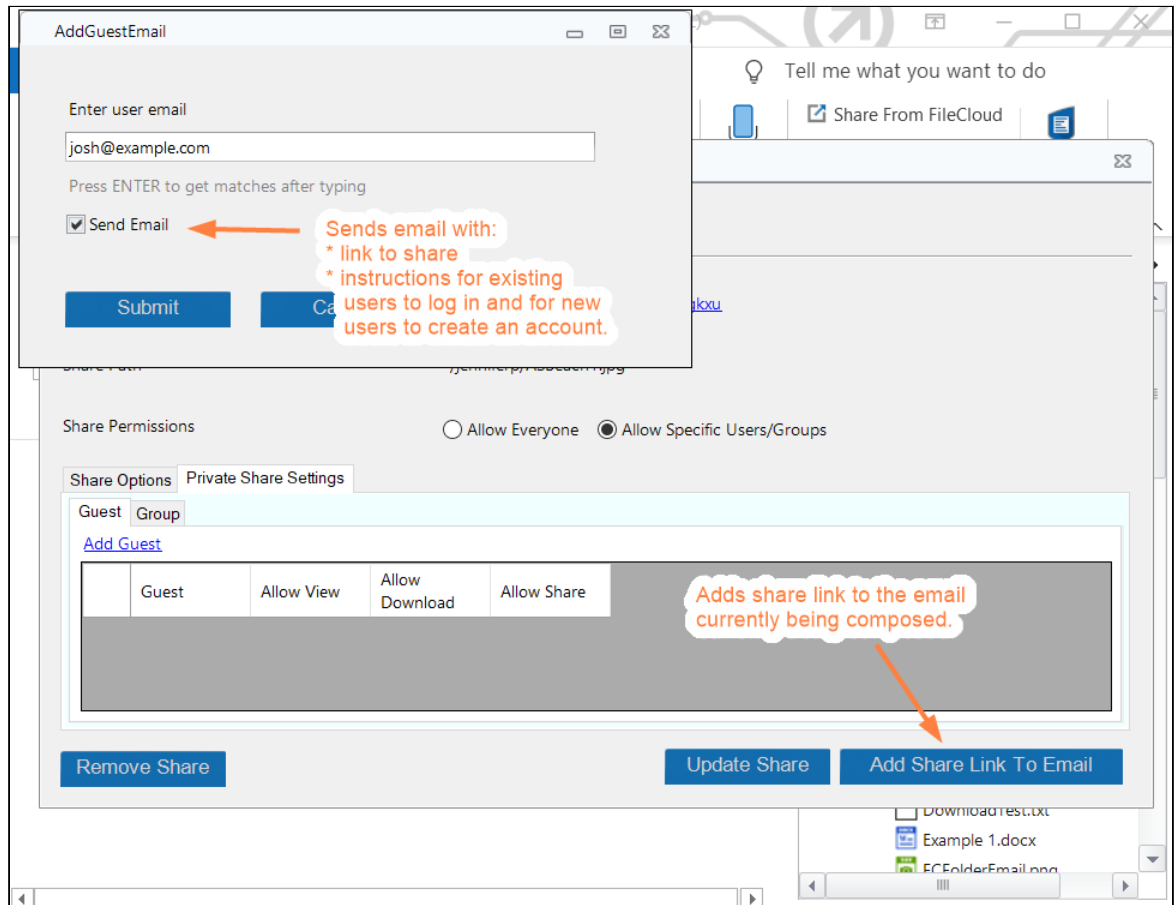
- Share URL:** <http://127.0.0.1/url/zd2zytmeuhebrtr6>
- Share Path:** /jenniferp/ASBeach1.jpg
- Share Permissions:**  Allow Everyone  Allow Specific Users/Groups
- Share Options:** Public Share Settings (selected tab)
- Share Name:** 3VsU9w4VP3PzPXIW
- Expires (Optional):**  No  Yes
- Upload Size Limit (MB):** Not Applicable
- Email File Change Notifications:**  Yes  No

At the bottom of the dialog are three buttons: 'Remove Share', 'Update Share', and 'Add Share Link To Email'.

Next to **Share Permissions**, if you select **Allow Specific Users/Groups**, instead of a tab for Public Share Settings, a tab for **Private Share Settings** appears.

It enables you to share the file with specific users who already have accounts in your system and specific users who do not have accounts.

When you share files with specific users who do not have accounts in your system, clicking **Add Share Link to Email** only adds the share link to the email that you are composing; it does not send the new user a message indicating how to create a new account. You must check **Send Email** in the **AddGuestEmail** dialog box to send the new user a message instructing them to create an account on FileCloud.

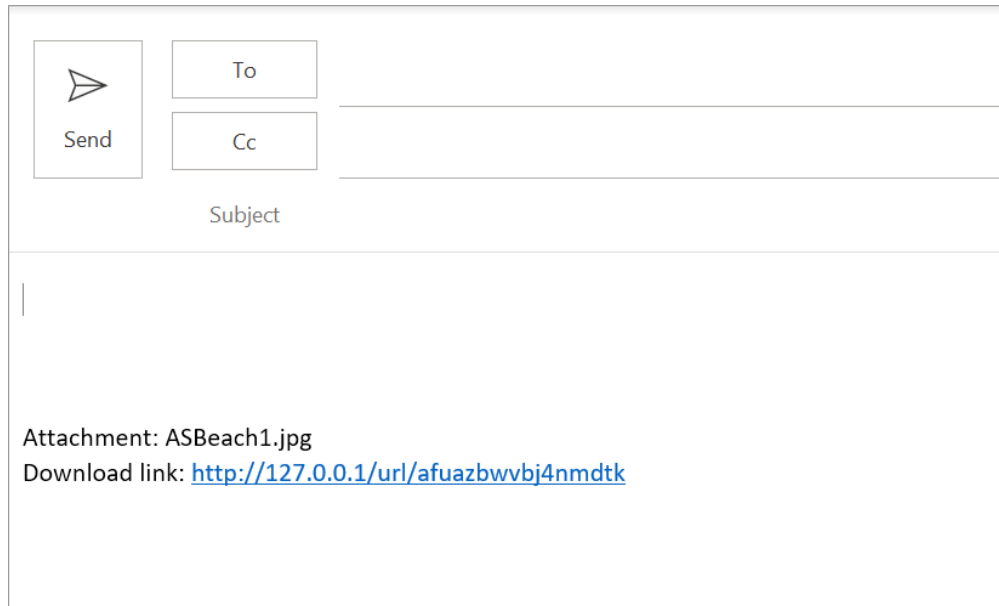


For additional help with share settings for public and private shares, see the topics in the section [Sharing Files and Folders](#).

If you do not add advanced options, the share is available to anyone you send the link to.

- **Remove Share** - Delete this share.

- **Add Share Link to Email** - Insert the link into the email that you are currently composing. The recipient can click it to access the share.



The screenshot shows an Outlook email composition window. On the left, there is a 'Send' button with a paper plane icon. To its right are input fields for 'To', 'Cc', and 'Subject'. The main body of the email contains the text: 'Attachment: ASBeach1.jpg' followed by 'Download link: <http://127.0.0.1/url/afuazbwvbj4nmdtk>'.

**i** When the file is shared as an attachment, FileCloud downloads the file and adds an attachment to the email body as well as creating a public share.

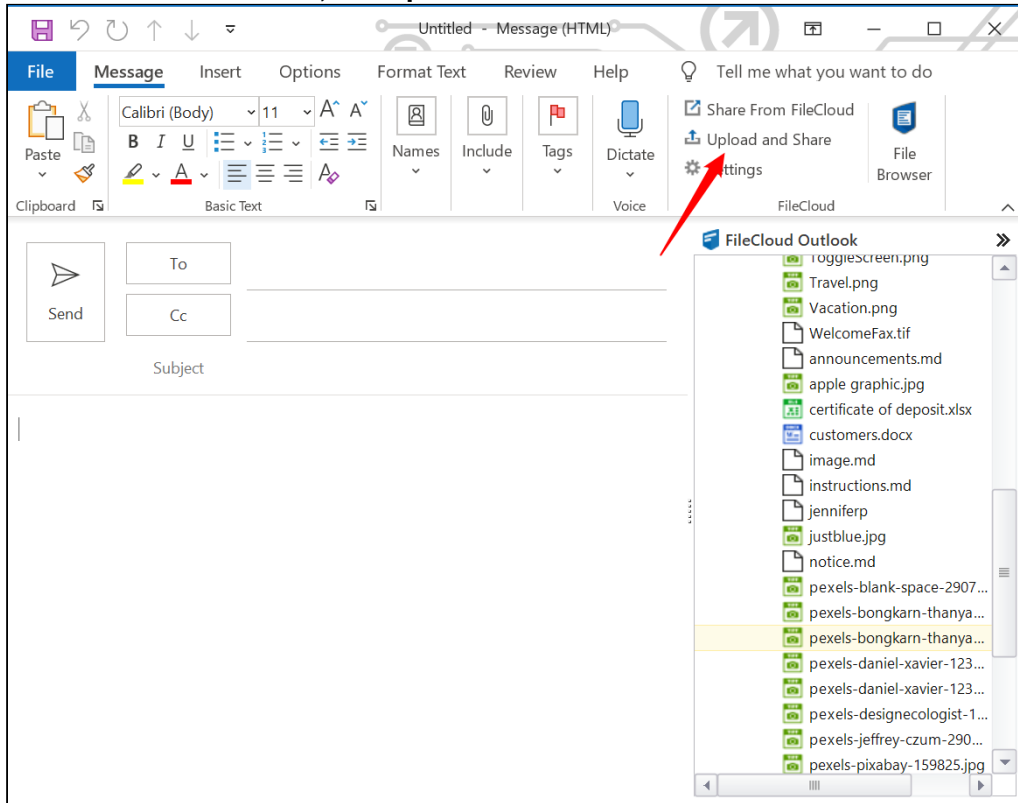
## Upload and Share

You can upload any file from your local drives to FileCloud and share the file. Once the file is uploaded to the FileCloud server, the file can either be shared as a link or as an attachment based on your settings.

To upload and share:

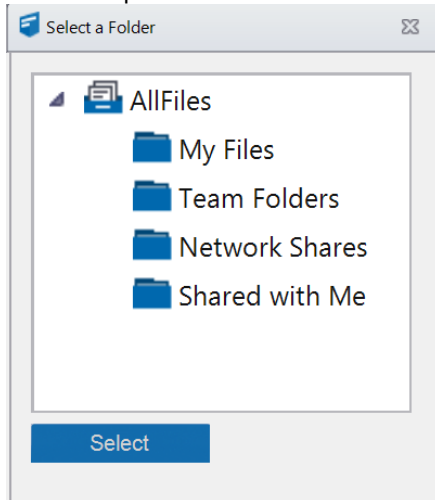
1. Open Outlook and click **New Email**.  
A new email form opens.

- In the ribbon above the form, click **Upload and Share**.



Your file explorer opens.

- Select the file that you want to share.  
Your file explorer closes and a Select a Folder window opens.



- Navigate to the folder that you want to upload the file into.
- Click **Select**.  
The file is saved to the folder, shared publicly, and added as a link or an attachment in the email.

### Restrictions on filetypes and file extensions 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.

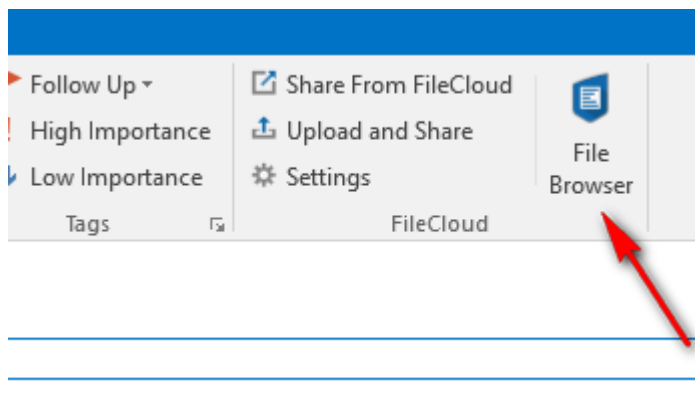
#### For Admins

- 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](#).

## File Browser

Starting with FileCloud 17.0, the Outlook add-in app contains a remote file browser function to access, edit and view all files on the server. This is an alternative to the web browser to access FileCloud. To open the File Browser, click **File Browser** in the ribbon of an email form.

For more details support, refer to the [File Browser for Outlook addin](#) support page.



## Troubleshooting

### I am not able to see the FileCloud Outlook add-in inside Outlook.

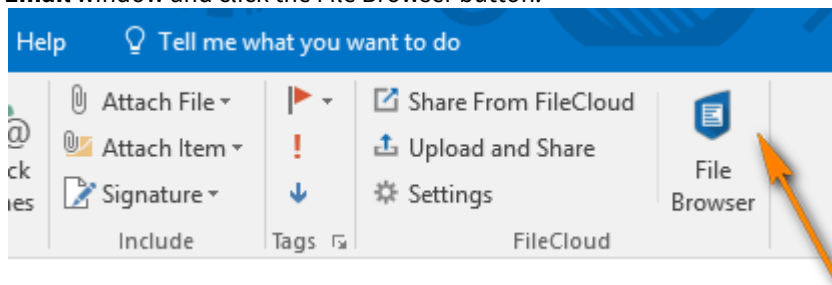
At times, MS Outlook may disable an add-in if there is a 0.234 second delay in starting Outlook for any reason. In Outlook, go to **File > Options > Add-Ins**. Find the FileCloud Outlook Add-In from the disabled add-ins list and enable the add-in. You can set Outlook to always enable FileCloud Outlook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

## File Browser - Outlook AddIn

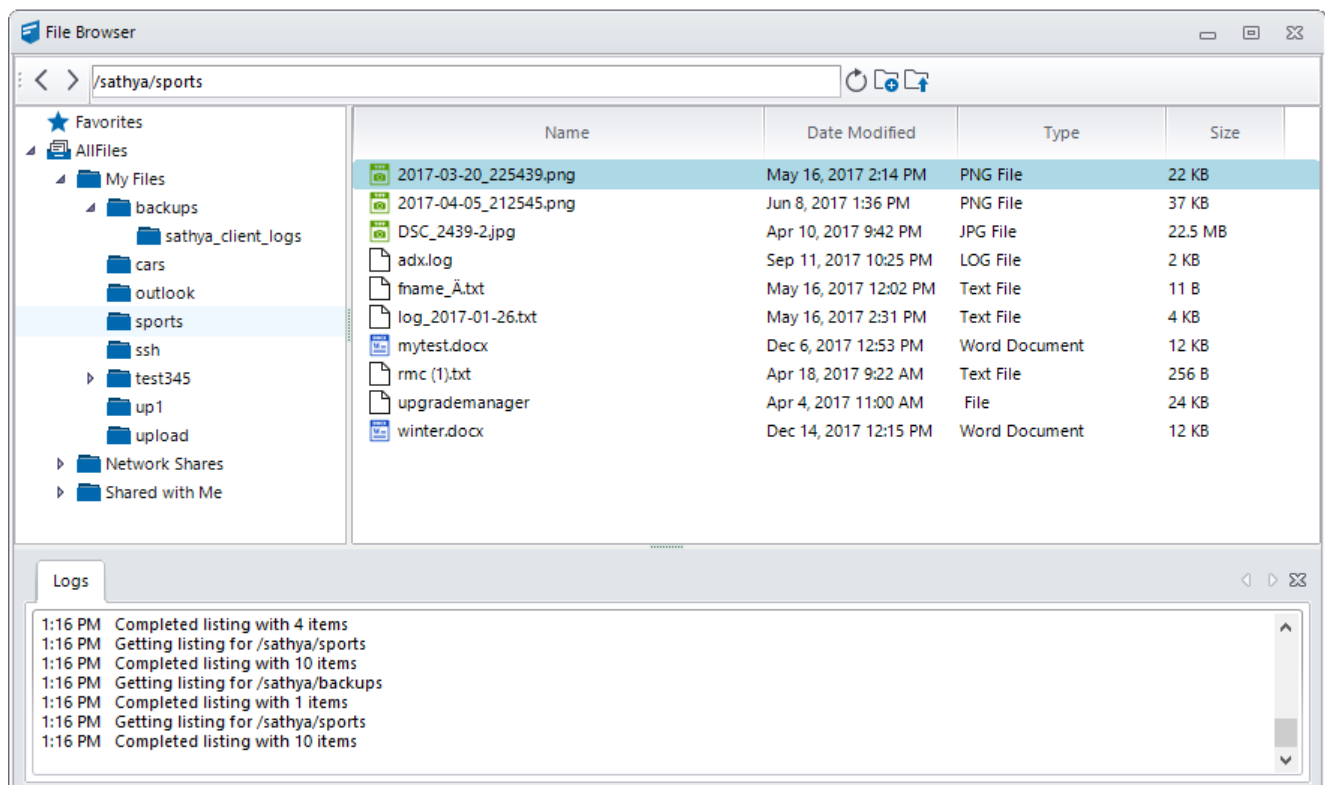
### Introduction

The File Browser is similar to Windows Explorer or Mac OSX Finder. The files and folders in the File Browser are remote and stored in the Filecloud server rather than the local disk.

Starting with FileCloud 17.0, the Outlook add-in contains a remote file browser function to access, edit and view all files in FileCloud. This is an alternative to the web browser to access FileCloud. To open the File Browser, open the **New Email** window and click the File Browser button.



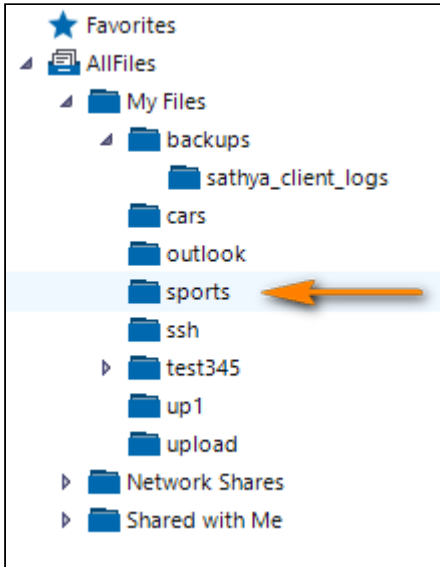
The File Browser user interface opens:



## Navigation

In the File Browser, you can navigate to different locations in FileCloud by different methods.

- Use the left hand side folder tree to navigate to different folders



OR

- Double-click folders on the right hand side folder listing

Name	Date Modified	Type	Size
backups	Nov 17, 2017 10:46 PM	File folder	
cars	Nov 15, 2017 9:58 AM	File folder	
outlook	Sep 19, 2017 2:05 PM	File folder	
sports	Mar 29, 2017 12:03 AM	File folder	
ssh	Jul 10, 2017 12:28 PM	File folder	
test345	May 24, 2017 10:02 AM	File folder	
up1	Nov 21, 2017 10:48 AM	File folder	
upload	Jul 10, 2017 10:06 AM	File folder	
boostcppjam	Sep 30, 2017 9:49 AM	JAM File	23 KB
spring345.docx	Dec 14, 2017 12:15 PM	Word Document	12 KB

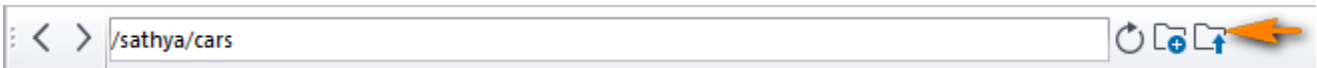
## History

You can also navigate to older locations that you previously visited by using the History back and forward arrows.



## Upload Files or Folders

You can use the icons located in the top bar to upload a file.



## Create a New Folder

Select the Create Folder icon to create a new folder in the current location.



## Refresh a File Listing

In any file listing, select the Refresh Icon to refresh the file listing.



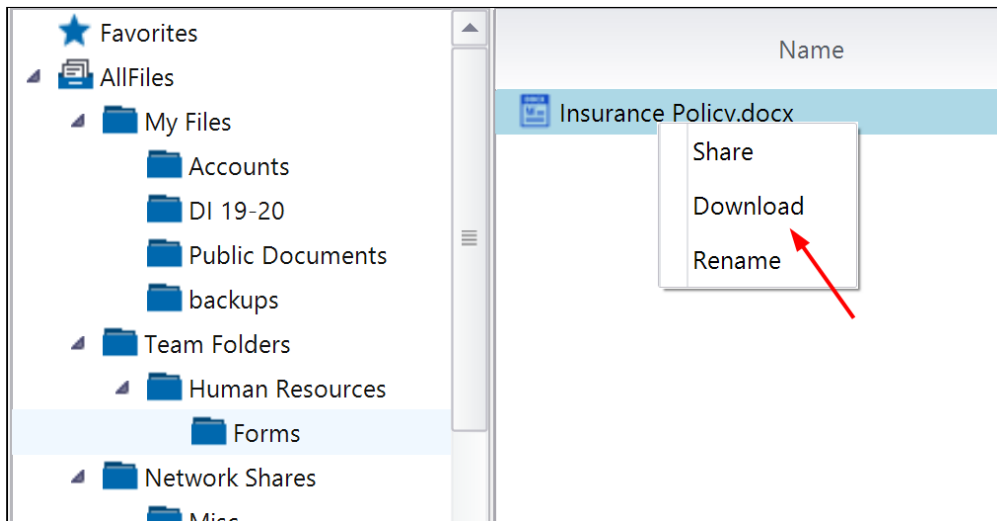
## File Actions

The following actions are not available in all FileCloud folders and for all files in the File Browser.



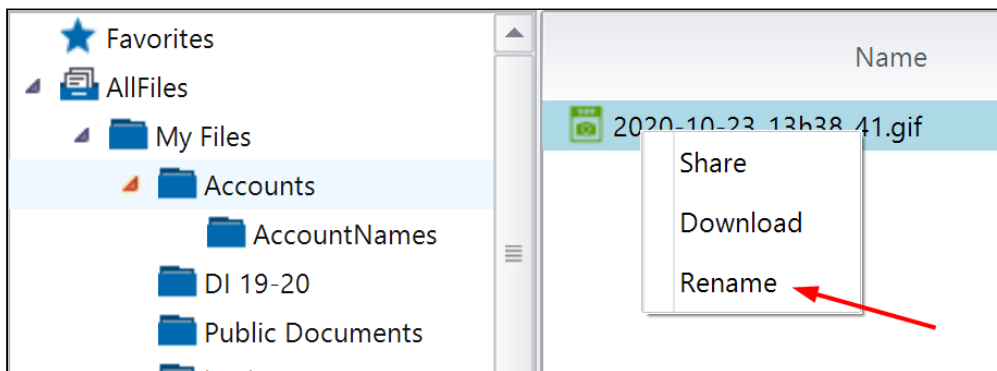
## Downloading Files

Right-click on a file and select download, then choose the local location to download to.



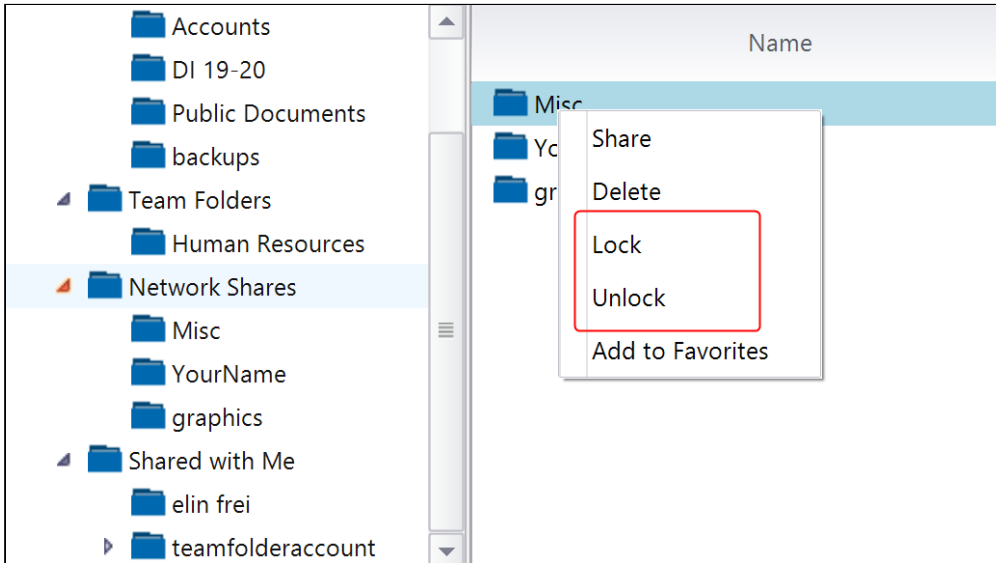
## Renaming Items

Right-click the item you want to rename and select the 'Rename' option.  
Enter a new name and hit "enter" or the "OK" button.



## Locking and Unlocking Folders

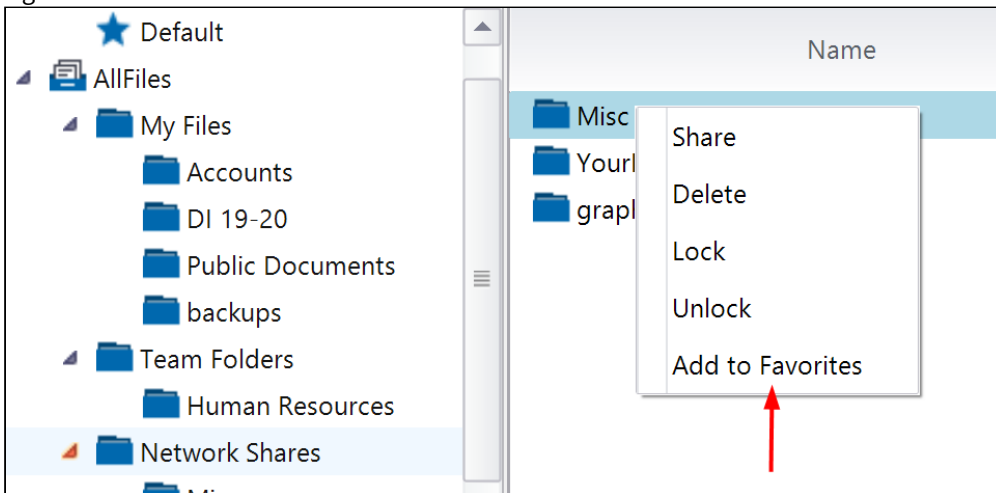
Right-click on a folder and choose 'Lock' or 'Unlock'.



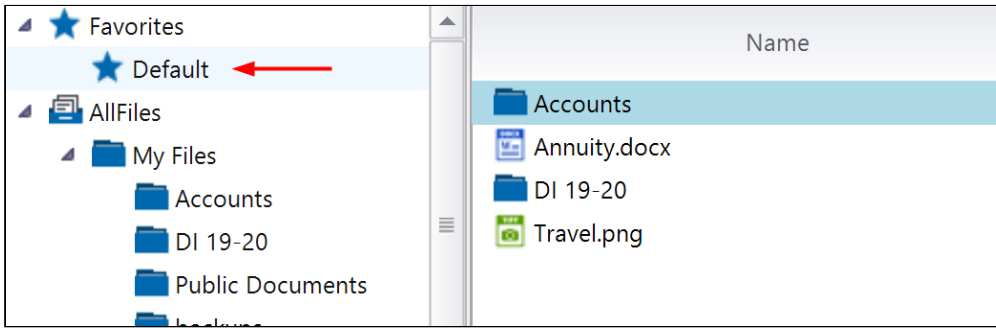
## Adding to Favorites

Favorites are starred items in the FileCloud web browser.

Right-click on a folder and choose 'Add to Favorites'.

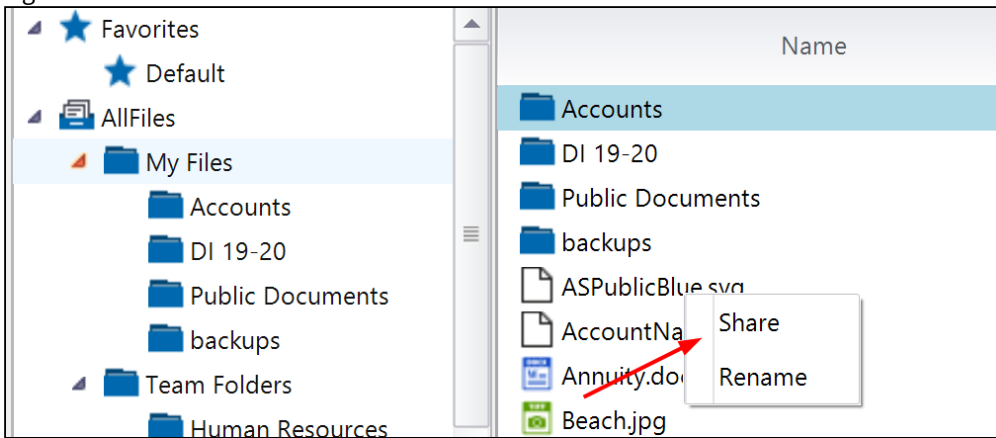


Quickly navigate to different folders or files saved in favorites by clicking **Favorites > Default** in the navigation pane.



## Sharing

Right-click on an item and choose "Share."



## Integration With Office

FileCloud allows users to share any file or folder with custom permissions.

### Configure Sync for Edit in Desktop

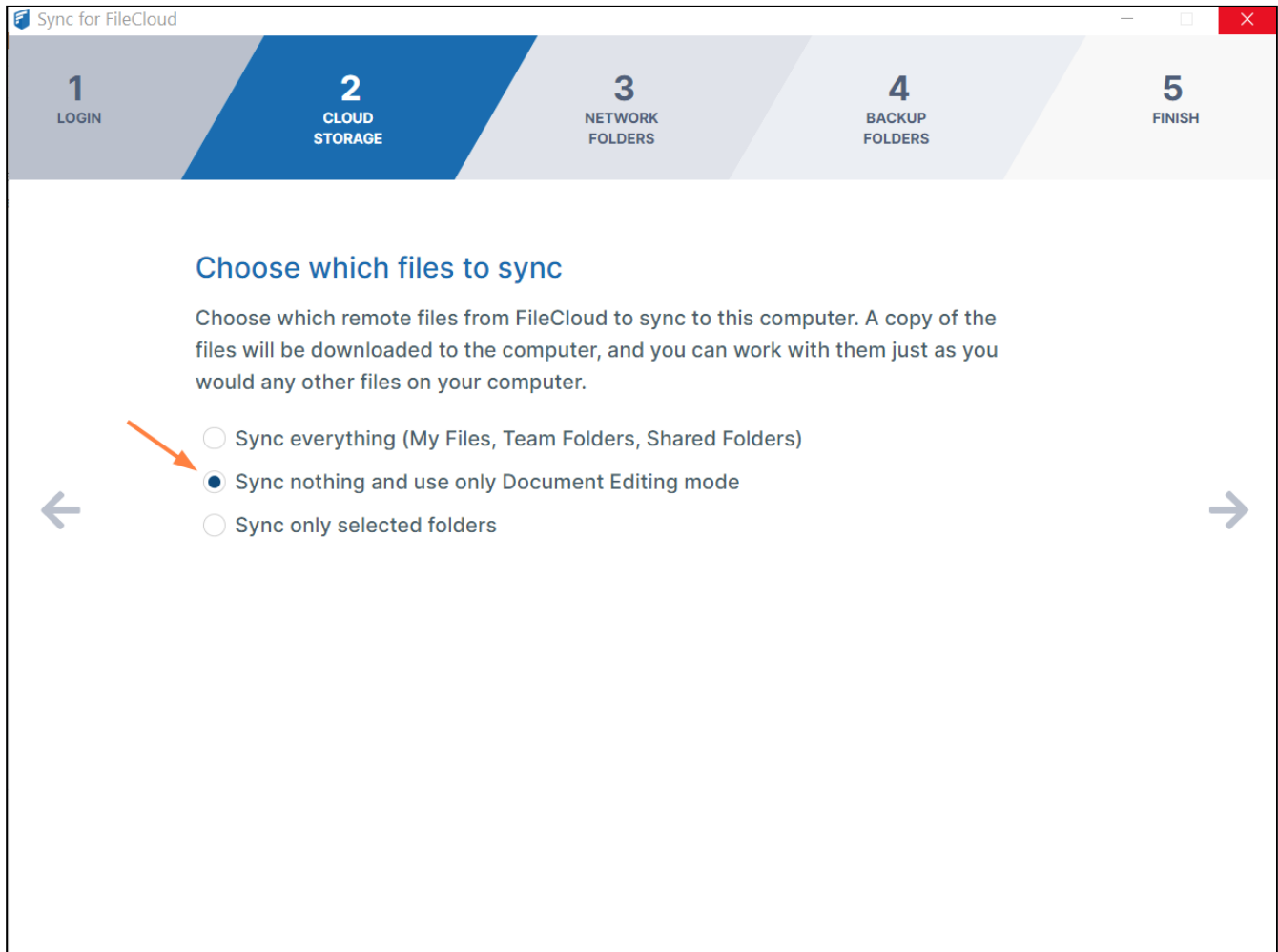
- i** Edit in Desktop (previously named Quick Edit) support is available in FileCloud starting from FileCloud Version 8.0 and in the Sync app starting from Version 8.84. If you are an administrator, see the notes at the bottom of this page for enabling Sync for Edit in Desktop.  
Edit in Desktop requires the Sync App to be installed on the local computer.  
Edit in Desktop does not work when the Sync App is set to run as a service.

Edit in Desktop allows you to select a document file from the Web UI and automatically open it locally in its native document editor. Changes you save automatically appear in the cloud as new versions. This function is ideal for users who need to edit files on their desktops, but don't want to install FileCloud Drive or sync all files to their local machine. It's also more convenient than downloading, editing, saving and uploading the saved version back to the cloud.

File types supported in Edit in Desktop include DOCX, DOC, PPTX, PPT, XLSX, XLS, IDD, PSD, XLSB, TXT and MD.

To perform Edit in Desktop, first install the Sync application locally on your computer.

When setting up account information, you may select the option to disable syncing and only provide document editing support. If you leave it unchecked, you will be able to use Edit in Desktop as well as Offline Syncing.



Next select any file in the web browser, and then click on the **Edit in Desktop** option to download and open the file in the local document editing application.

The screenshot shows the 'My Files' section of the FileCloud interface. At the top, there is a breadcrumb 'My Files' and a title 'My Files' with '56 items' below it. A search bar labeled 'Filter Items' is present. Below this is a table of files and folders:

Name	Modified
★ Accounts	Oct 23, 2020 2:13 PM by you
★ DI 19-20	Jun 08, 2020 1:00 PM by you
Public Documents	Jun 15, 2020 10:04 AM by you
backups	Jul 24, 2020 4:08 PM by you
2020-11-04_09h53_35.png	Nov 04, 2020 9:53 AM by you
★ ASPublicBlue.svg	Aug 20, 2020 1:34 PM by you
AccountNames.txt	

A context menu is open over the 'AccountNames.txt' file, listing various actions: Preview (Enter), Download (D), Web Edit, Edit in Desktop (highlighted with a red arrow), Rename (F2), Share, Copy Direct Link, Previous Versions, Delete (Del), Unlock, Comment (C), Copy (Ctrl + C), Move (Ctrl + X), and Export Secure Doc. At the bottom of the file list, there is a toolbar with icons for Preview, Download, Edit, Share, Copy, Move, Delete, Lock, and a menu icon (three dots).

The document is opened in an editor, for example, Microsoft Word. Simply edit as you would normally and then click save. The file is saved to the server and a notification shows that the version has been saved.

You can continue to edit the document and save it. Each time you save it a new version is uploaded.

### Note for Administrators:

To enable Edit in Desktop, you must check the customization option in the Admin control panel.

Go to **Customization** → **General** → **UI Features** → **Show Edit in Desktop Option**.

The screenshot shows the FileCloud administration console. On the left is a navigation menu with categories: NOTIFICATIONS, DEVICES, GOVERNANCE, MISC., SETTINGS, CUSTOMIZATION, and SYSTEM. The 'CUSTOMIZATION' section is selected, and the 'Customization' option is highlighted. The main content area is titled 'Customize User UI Features' and contains several settings, all of which are checked:

- Enable UI Customizations:** Enable UI customization
- Show Document Preview:** Show "Preview" in document file menu options (Requires "Document Preview" configured)
- Enable additional email templates:** Enable email templates based on user access level
- Show Single File Share Full Preview:** Show full screen preview for single file public shares
- Show New Document Creation Option:** Show new document creation option in the folder menu
- Show Edit in Desktop Option:** Show "Edit in Desktop" (Requires user to install CloudSync client)

The 'Show Edit in Desktop Option' setting is highlighted with a red rectangular box.

## Access Files Using Mobile Apps

To access Office documents in iOS, see [FileCloud iOS Integration with 3rd Party Apps](#).

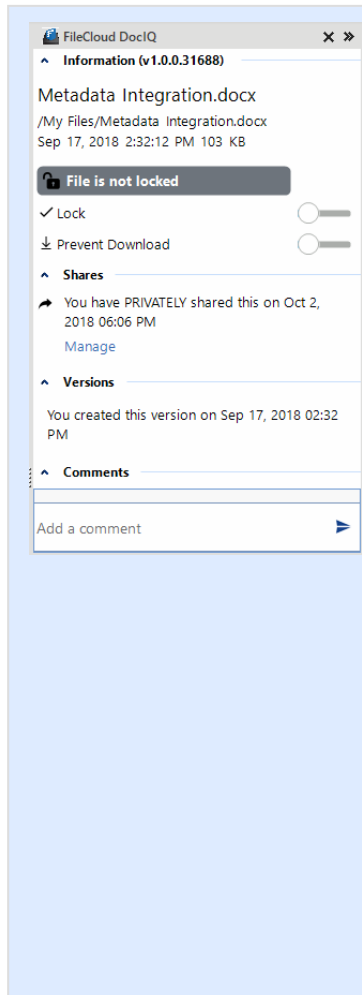
To access Office documents in Android, see [Using FileCloud with Other Android Apps](#).

## Enabling DocIQ

**⚠️ New FileCloud Sync and FileCloud Drive users:** DocIQ has been replaced with FileCloud for Office. Please go to [Using FileCloud for Office](#).

**Current FileCloud Sync and Drive users (DocIQ users):** Support is no longer available for DocIQ. Later this year, DocIQ will be fully deprecated. Although you can continue to use DocIQ with the current release, we recommend using FileCloud for Office, which can be downloaded from the Office add-ins store. Now, when you upgrade FileCloud Sync or FileCloud Drive, you are given the choice of using FileCloud for Office or continuing to use DocIQ. If you choose to use FileCloud for Office, please see [Using FileCloud for Office with Sync](#) or [Using FileCloud for Office with Drive](#).

DocIQ is a Microsoft Office add-in for FileCloud Sync and FileCloud Drive clients.



DocIQ works with the following Microsoft Office applications:

- Word
- Excel
- PowerPoint

#### What does DocIQ do?

DocIQ works with Office documents to help you manage shared files.

DocIQ gives you the ability to:

- manage file locking
- collaborate with your colleagues through comments
- see how shared files are being managed

#### How do I use DocIQ?


1. You open an Office application such as Word, Excel or PowerPoint.
2. Inside the Office application, you open a file saved to a FileCloud Sync or FileCloud Drive folder.
3. DocIQ displays as a task panel inside the Office application with the following information:
  - File details
  - Lock status
  - File sharing details
  - Comments attached to the file

#### How do I install and work with DocIQ?

1. [Install DocIQ.](#)
2. [Configure DocIQ.](#)
3. [Work with file locking.](#)
4. [Troubleshoot Doc IQ issues.](#)



# FileCloud File Browser

 FileCloud's standalone File Browser is available beginning in FileCloud 21.2.

The FileCloud File Browser lets you work in a file explorer format where you can perform the same view, share, edit, and delete file operations that you perform in the user portal.

## Install and open File Browser

### Installation

First, install File Browser for Windows or Mac:

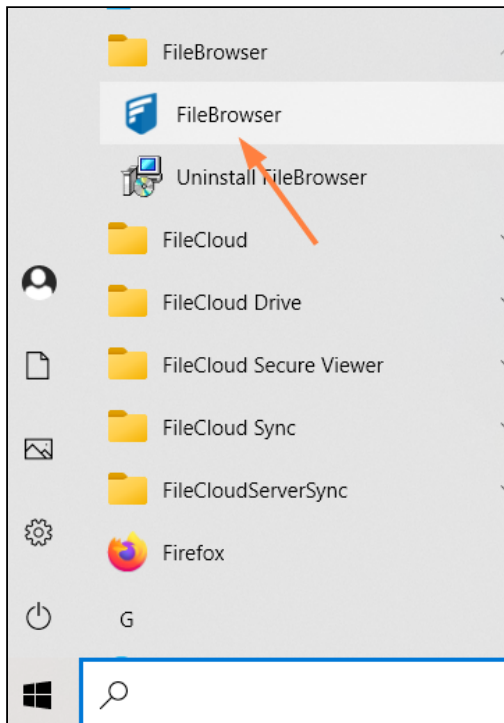
[Install File Browser on Windows.](#)

[Install File Browser on a Mac.](#)

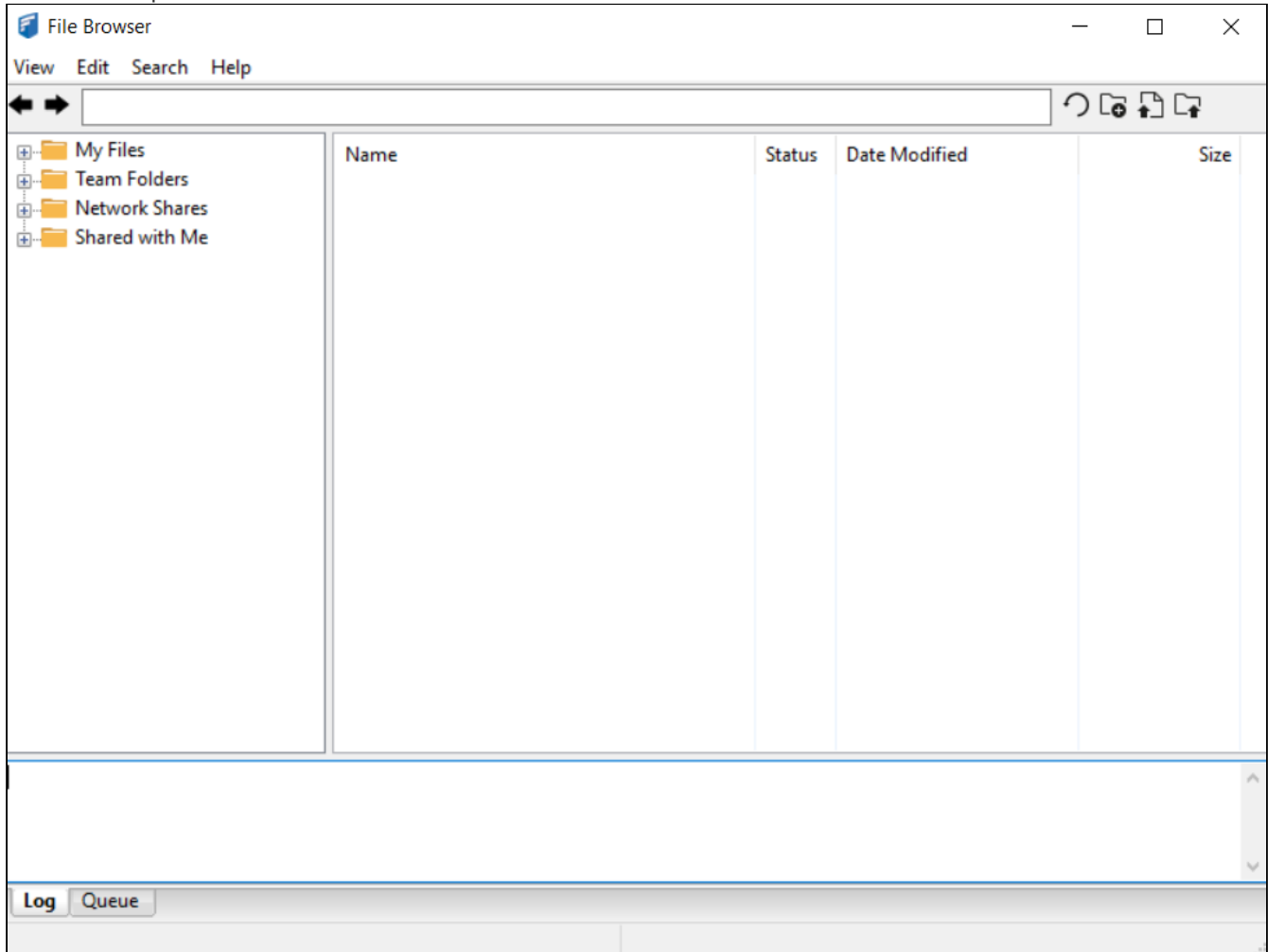
### Running File Browser

If you leave the default settings, File Browser begins running and opens when installation is complete.

To start File Browser when it is not running, in your system navigation panel, open the File Browser folder and click the File Browser icon.

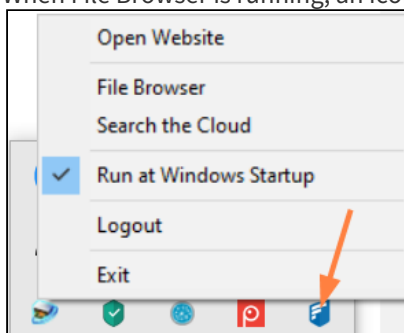


File Browser opens:



## System tray icon

When File Browser is running, an icon appears in your system tray. Right click on it to see the following options;



- **Open Website** - Opens FileCloud in the user portal.
- **File Browser** - Opens the File Browser.
- **Search the Cloud** - Opens the File Browser search dialog box. See [Search for a File or Folder in File Browser](#).

- **Run at Windows Startup** - Enabled by default. File Browser starts when you start your system.
- **Logout** - Log out of File Browser. You will be prompted to log in again.
- **Exit** - Close File Browser without logging out. The icon disappears from the system tray.

In this section

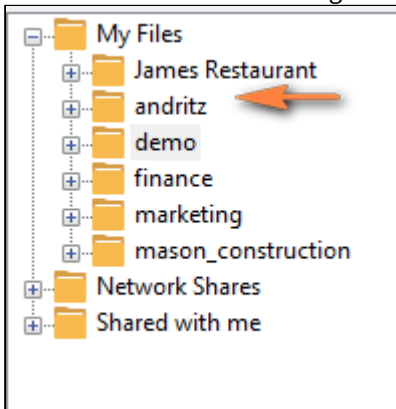
## Perform File Actions in File Browser

The following actions can be performed on files and folders in File Browser. These actions occur in real-time, and are reflected in the user portal soon after they occur.

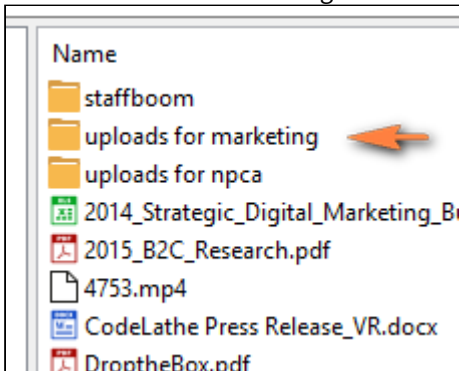
### Browsing files

There are several ways you can navigate to locations in the remote FileCloud server in File Browser.

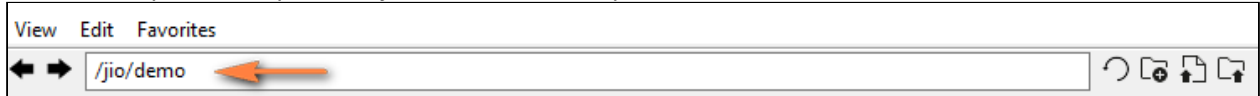
- Use the left folder tree to navigate to different folders.



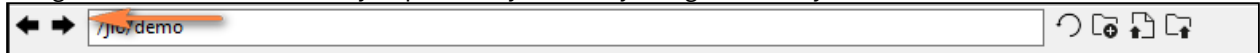
- Double-click folders on the right folder listing.



- Enter the full path in the path entry text area, and then press enter.



- Navigate to older locations that you previously visited by using the History back and forward arrows.



- In any file listing, select the Refresh icon, or click F5 to refresh the listing.



### Creating a new folder

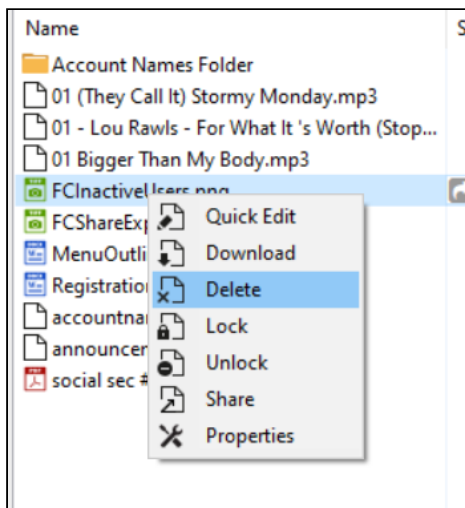
Select the Create Folder icon to create a new folder in the current location.



### Deleting Files and Folders

You can delete a file or folder in File Browser.

Right-click the item you want to delete, and choose **Delete**.

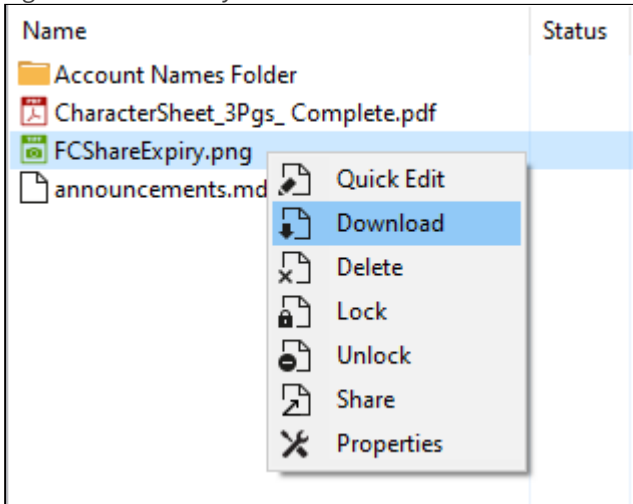


💡 Alternatively, select items you want to delete and choose the Edit menu and select the **Delete** option.

### Downloading a file

You can download a file in File Browser

1. Right-click the item you want to download and choose **Download**.



Your file system's explorer window opens.

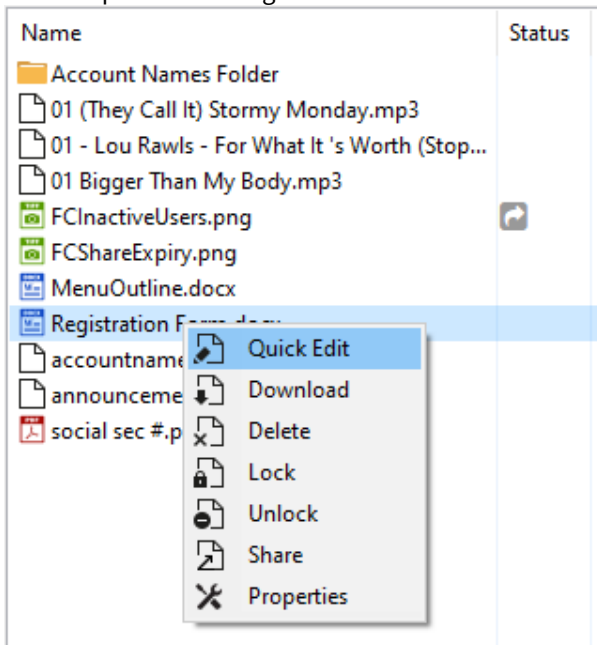
2. Choose the location where you want to store the downloaded file and select it.

### Editing a file

From File Browser, you can quickly open a file for editing in the application you have associated with it in your system.

To edit a file:

1. Double-click the file or right-click on it and choose **Quick Edit**.  
The file opens for editing.



2. Make changes and then click **Save**.

### Locking and unlocking files and folders

You can set a lock to prevent other users from opening a file or folder.

Locking tells other users that you are actively using the file or folder.

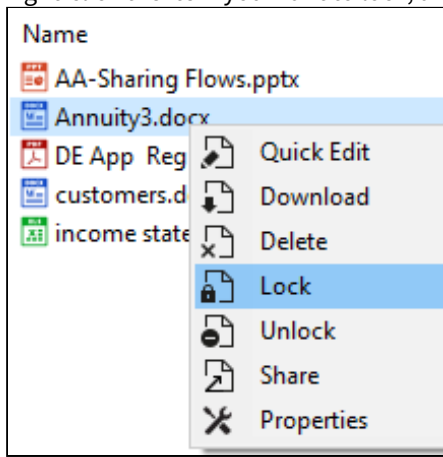
When a file or folder is locked, the following conditions apply:

- The owner of the lock has full access to that file or folder and can modify it
- An Admin can always override the lock
- Users cannot download the locked file or folder
- Users cannot view the locked file or folder
- Users cannot modify the locked file or folder

When you lock a file or folder, all of the FileCloud client apps and the FileCloud user portal are subject to the lock restrictions.

#### To lock a file or folder

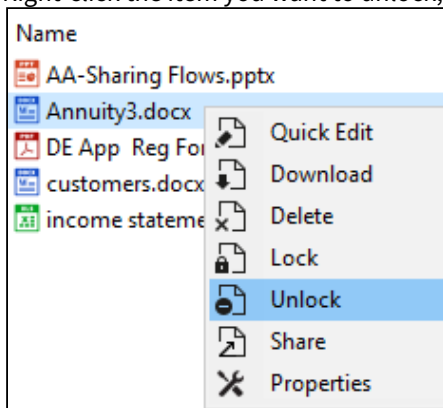
Right-click the item you want to lock, and then select **Lock**.



A message indicates if the lock is successful or not.

#### To unlock a folder:

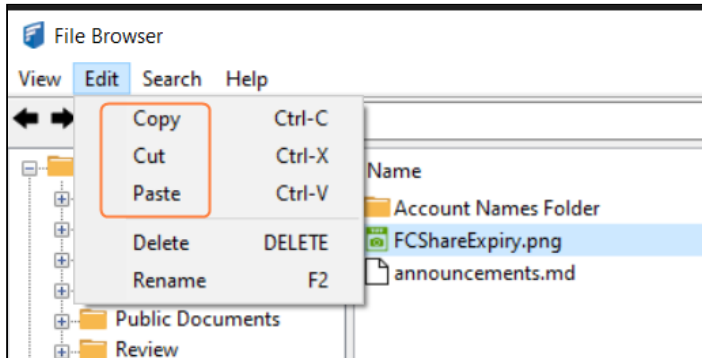
Right-click the item you want to unlock, and then select **Unlock**.



A message indicates if the lock is successful or not.

### Moving or copying files and folders

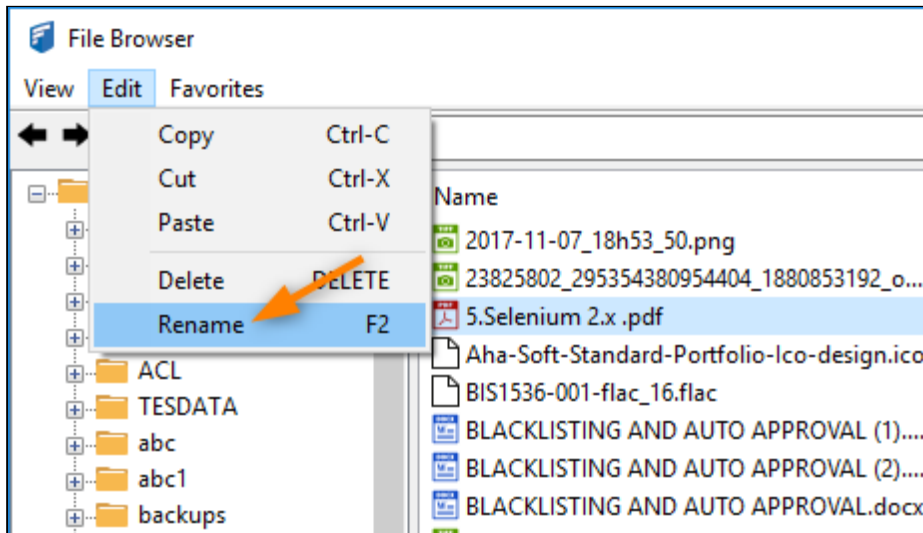
You can move or copy a file or folder in File Browser.



1. Select items you want to move and choose the Edit menu and select **Cut** or **Copy**.
2. Navigate to another path and choose the Edit menu and select **Paste**.

### Renaming files and folders

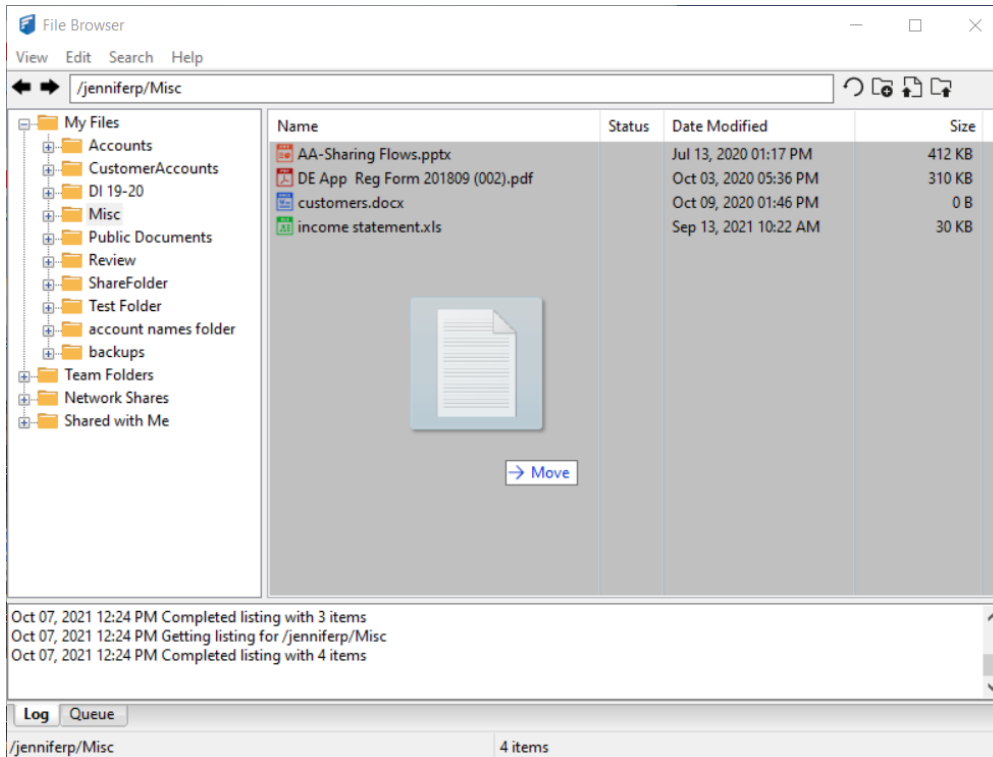
You can rename a file or folder in File Browser.



1. Select item you want to rename and choose the Edit menu, and select **Rename**.
2. Type in the new name, and click Enter or **OK**.

### Uploading files and folders

You can drag and drop files or folders into the right folder listing to upload the files directly to FileCloud.



You can also use the following icons located in the top bar to upload a file or upload a folder.



 Clear the pending upload or download queue items by selecting the View menu and selecting **Clear Queue**.

### Restrictions on filenames and file extensions 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](#).

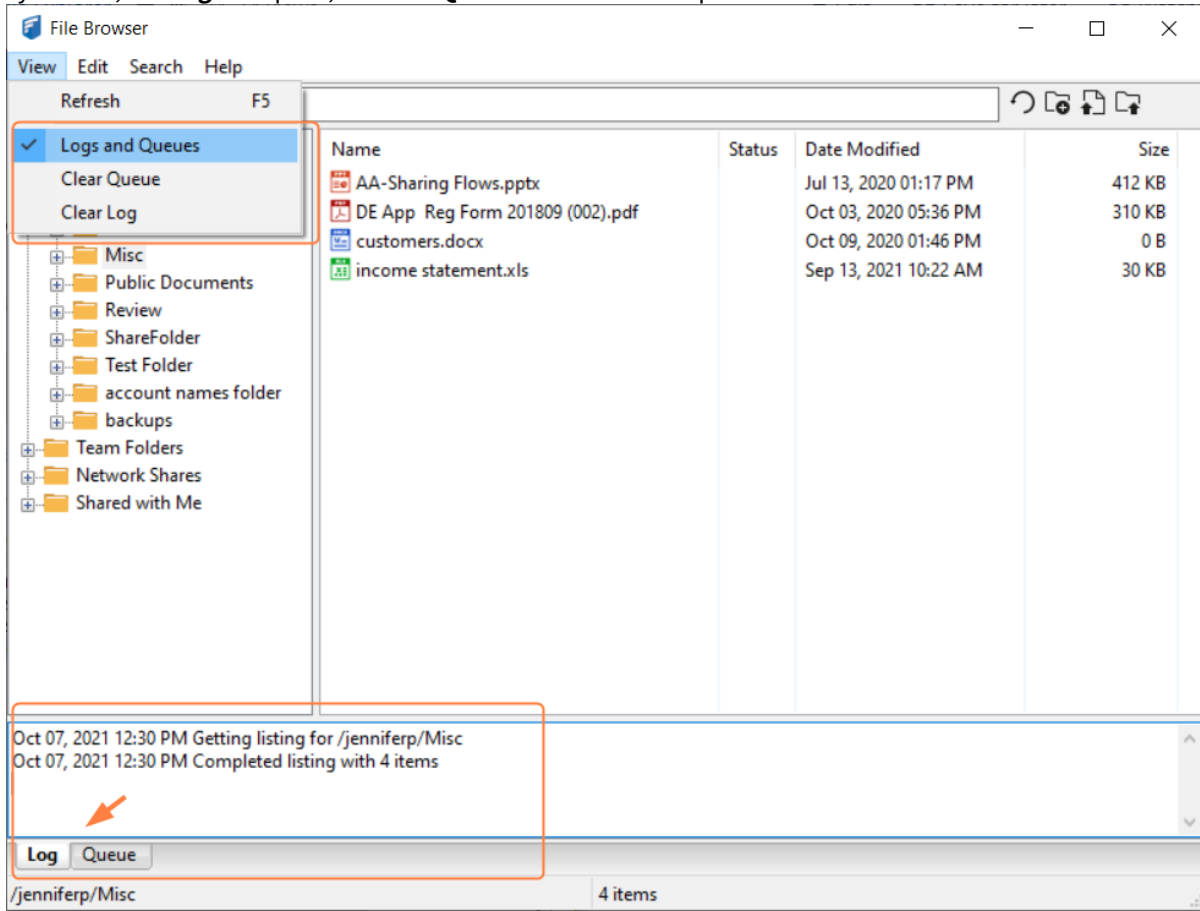


## Viewing and clearing the log and the queue

You can view log messages to troubleshoot File Browser issues, or clear the log if it is getting too large. You can also view and clear the queue of pending and current actions.

### To view the log or queue:

1. In the **View** menu, choose **Logs and Queue**.
2. By default, the **Log** tab opens; click the **Queue** tab to view the queue.



### To clear the log or queue:

In the View menu, choose **Clear Queue** or **Clear Log**.

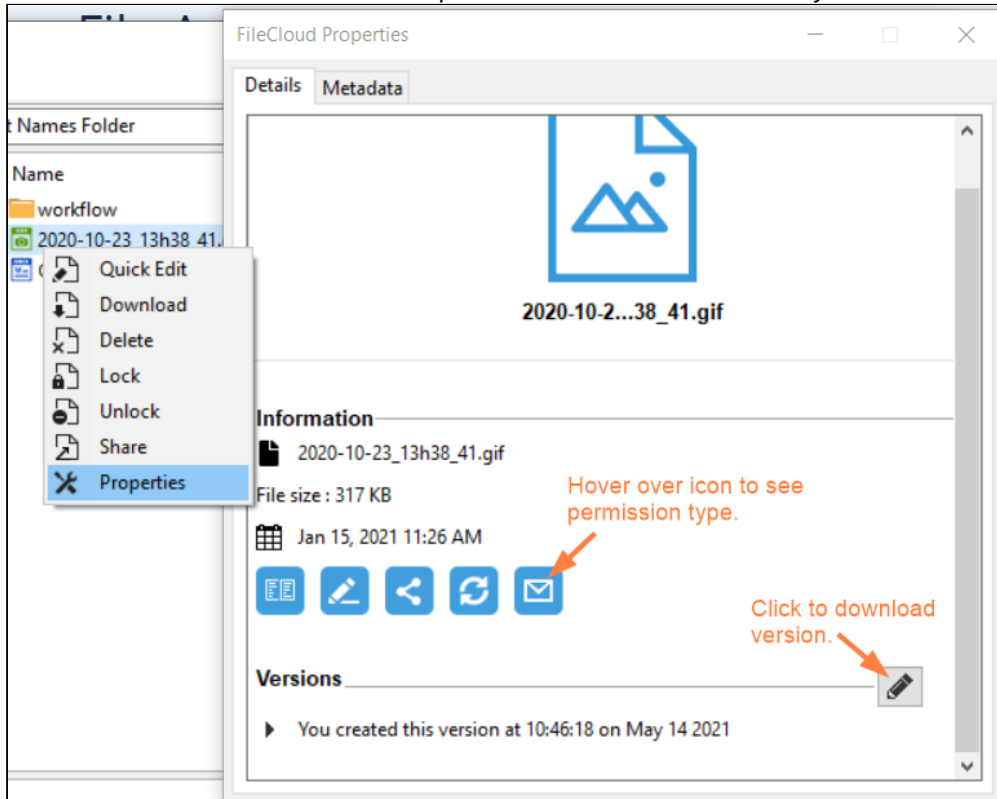
## Viewing file information and versions

You can view information about file size, create dates, and permissions, and download previous file versions in the **Details** tab of a file's properties.

### To access file details and versions:

1. Right-click the item you want to view the properties for, and then select **View FileCloud Properties**. The **FileCloud Properties** dialog box opens to the **Details** tab. On this tab you can view information such as file size, create date, and your permissions for the file (hover over the icons to see the types of permissions).

2. Click the Edit icon next to **Versions** to open a list of versions that enables you to download each version.



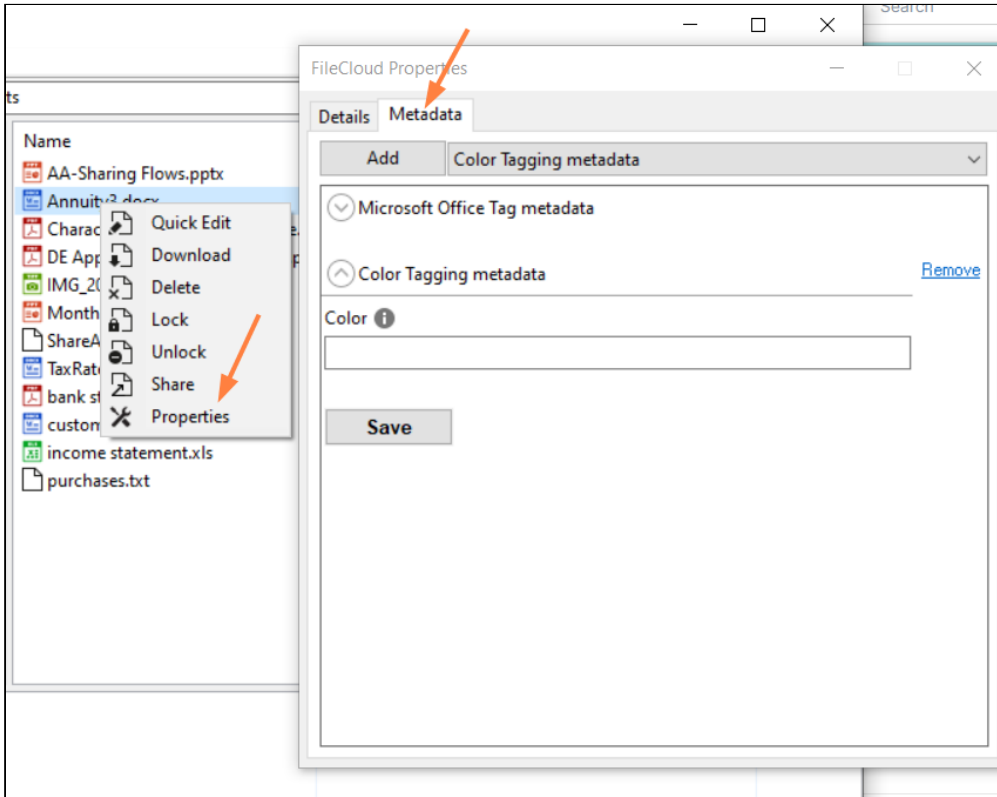
### Working with metadata

You can view the metadata attributes for a file, or add an attribute if your administrator allows it.

To view or add metadata:

1. Right-click the item you want to access the metadata for, and then select **Properties**. The **FileCloud Properties** dialog box opens.

2. Click the **Metadata** tab.



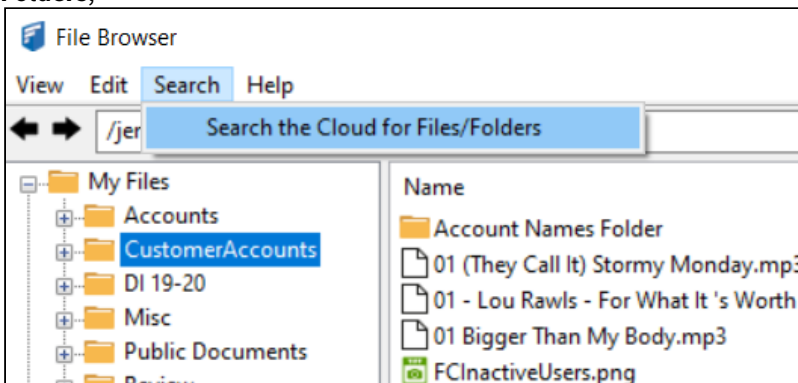
3. Use the following instructions to manage [metadata](#).

## Search for a File or Folder in File Browser

You can search in a folder that appears on the left or right side in File Browser

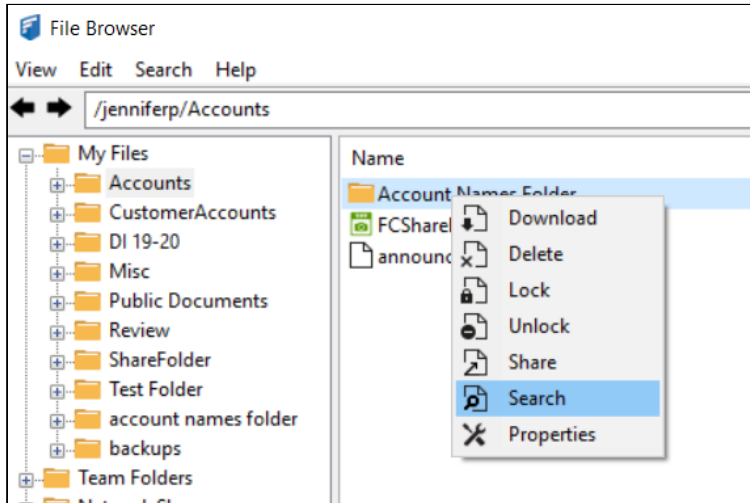
### To search in File Browser:

1. Select a folder in the left panel, and click **Search** in the menu bar. Then choose **Search the Cloud for Files/Folders**;



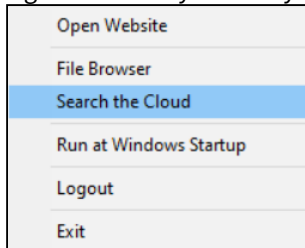
OR

Right-click a folder in the right panel, and choose **Search**;



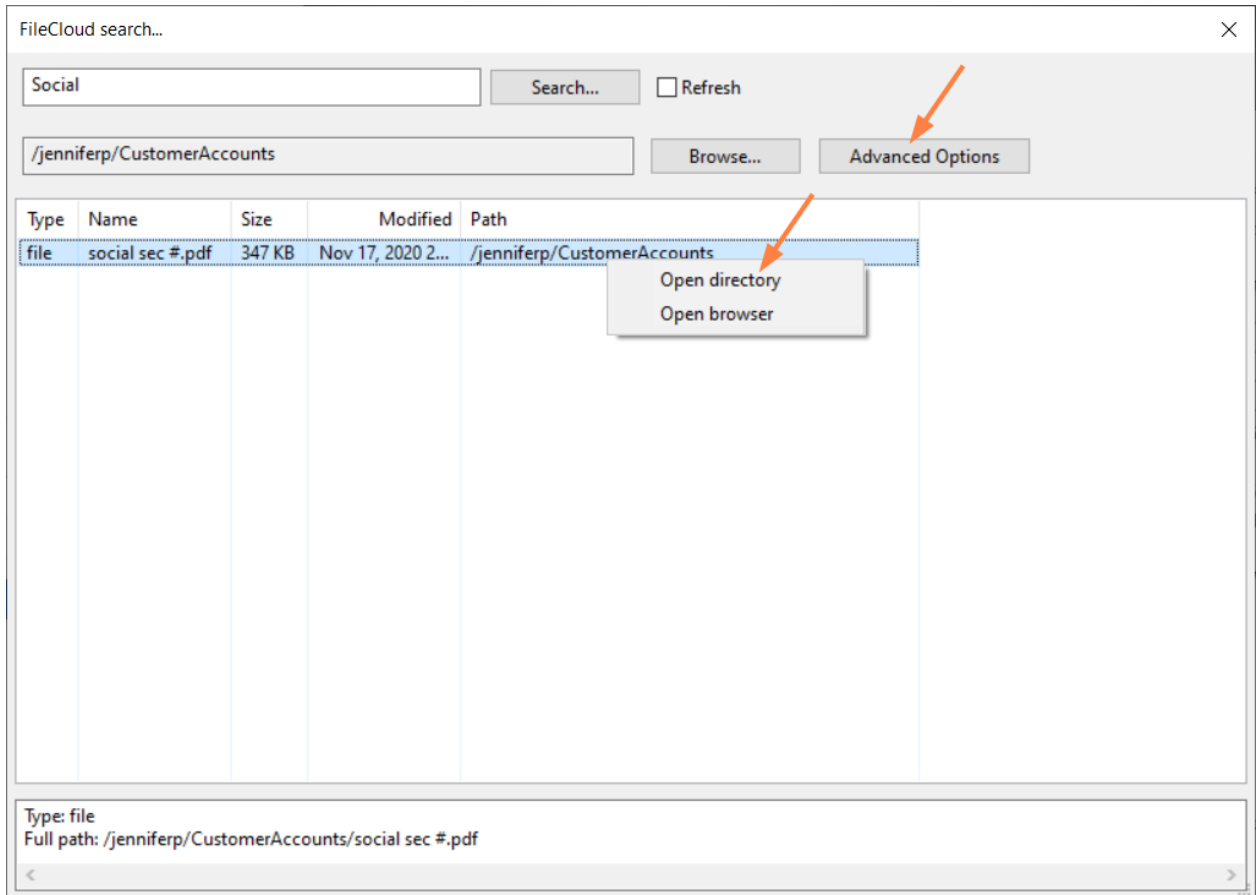
OR

Right-click the system tray icon and choose **Search the Cloud**.



A FileCloud search dialog box opens. It shows the folder path you selected.

2. Enter a search term.  
Your search results are returned.



- 3.
4. Right-click a result, and choose **Open directory** to open the directory in File Browser if it is not already open. Right-click a result, and choose **Open browser** to open it in the FileCloud user portal.

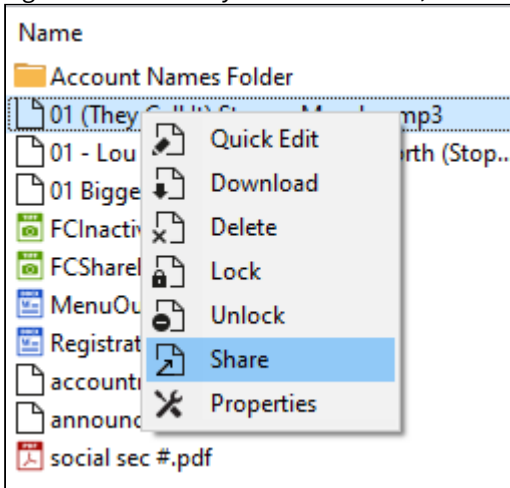
Click **Advanced Options** to open advanced search options. For help using these options, see [Search](#).

## Share a File or Folder in File Browser

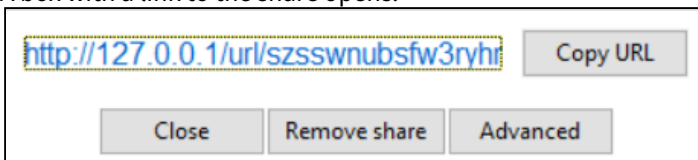
You can share a file or folder from File Browser.

### To share a file or folder:

1. Right-click the item you want to share, and select **Share**.








A box with a link to the share opens:



- This link is public by default and can be accessed by external users.
  - When you share the link with someone, they can access the file even if they do not have a FileCloud account.
  - You can set advanced options to share the file or folder privately, too.
2. To copy the URL to your clipboard, click **Copy URL**.  
Use the URL you copied to share your item.
  3. To share privately or access advanced share options click **Advanced**.  
A **Manage share for file** dialog box opens.

Manage share for file - 01 (They Call It) Stormy Monday.mp3

Share URL:      

**Share Options**

Shared File/Folder:  
/jenniferp/CustomerAccounts/...

Share name:

Expires (Optional)  
 Never Expires  Expires

Restrict Downloads (Optional)  
 No Restrictions  Restrict to

Email File Change Notifications  
 Yes  No

Enable Password Protection  
 Yes  No

**Share Permissions**


Allow Everyone  
 Allow Selected Users/Groups

Guest **Groups**

Guest	View	Download	Share

See the section [Sharing Files and Folders](#) for complete information about sharing and instructions on using advanced share options.

## FileCloud WebDAV Access


-  FileCloud is preparing to deprecate WebDAV.
- Beginning with FileCloud 23.1, WebDAV can no longer be enabled or managed through the FileCloud admin portal.
  - At some time in 2024, WebDAV will no longer be available in FileCloud.


For help enabling or disabling WebDAV currently, please [Contact FileCloud Support](#).

FileCloud supports the WebDAV protocol to allow accessing your files using a WebDAV client.


Web Distributed Authoring and Versioning is an extension of the Hypertext Transfer Protocol that allows clients to perform remote Web content authoring operations.

## FileCloud WebDAV Access

-  Ensure that [WebDAV is enabled](#) in your server by your Administrator.

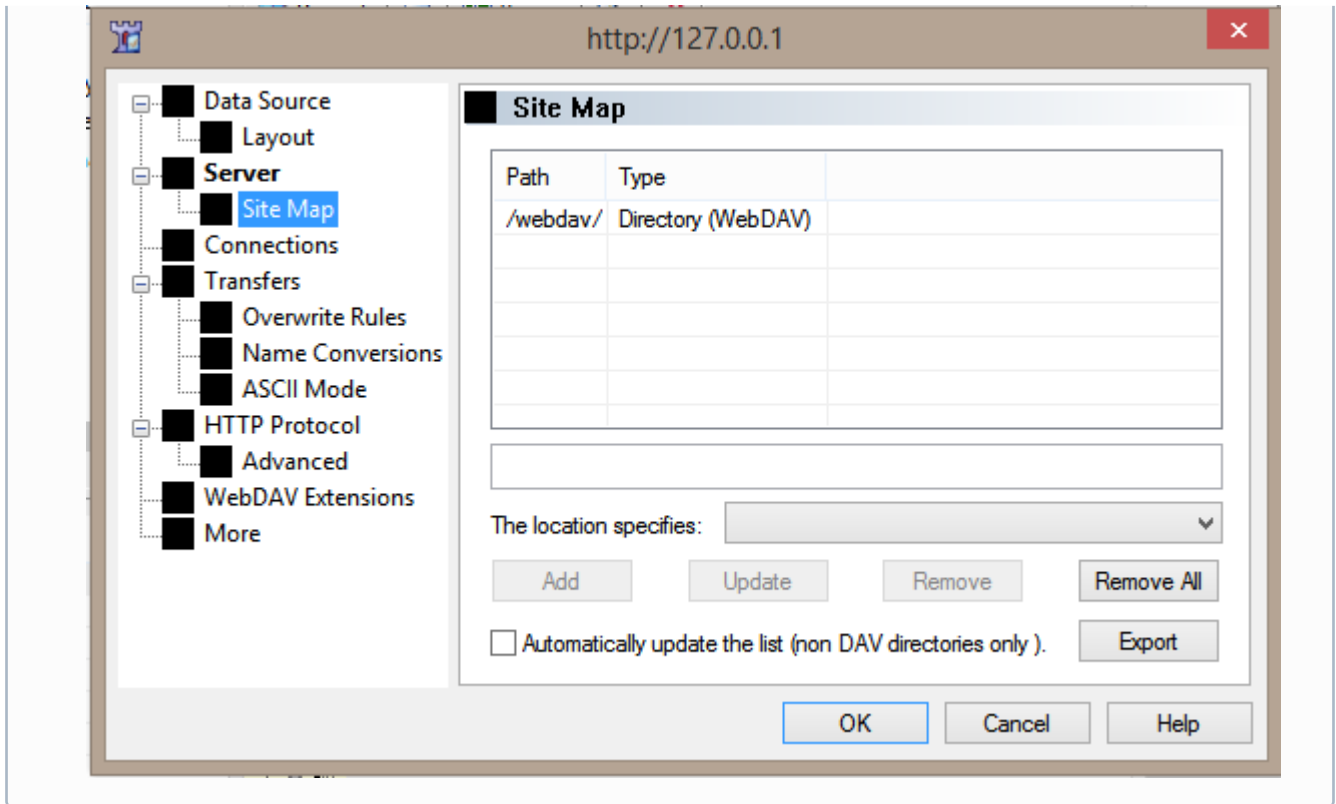
-  2FA login is not supported for WebDAV.

Use the following information to use a WebDAV client to access your storage space.

-  WebDAV URL: `http://site/webdav/`  
Username: `useraccount`  
Password: `yourpassword`

**NOTE the trailing slash after "webdav" in the URL. Clients will fail without it**





## WebDAV Client Compatibility

### ⚠ Mac OSX Finder

Finder generates a lot of unnecessary WebDAV requests. When coupled with AD or LDAP authentication this can be slow.

To mount FileCloud WebDAV in Mac Finder: See [this link](#)

WebDAV Client	Browsing Folders	Download Files	Create Folder	Delete Files/ Folders	Upload File
WebDAV Navigator (iOS)	YES	YES	YES	YES	YES
BitKinex 3.2.3 (Windows)	YES	YES	YES	YES	YES

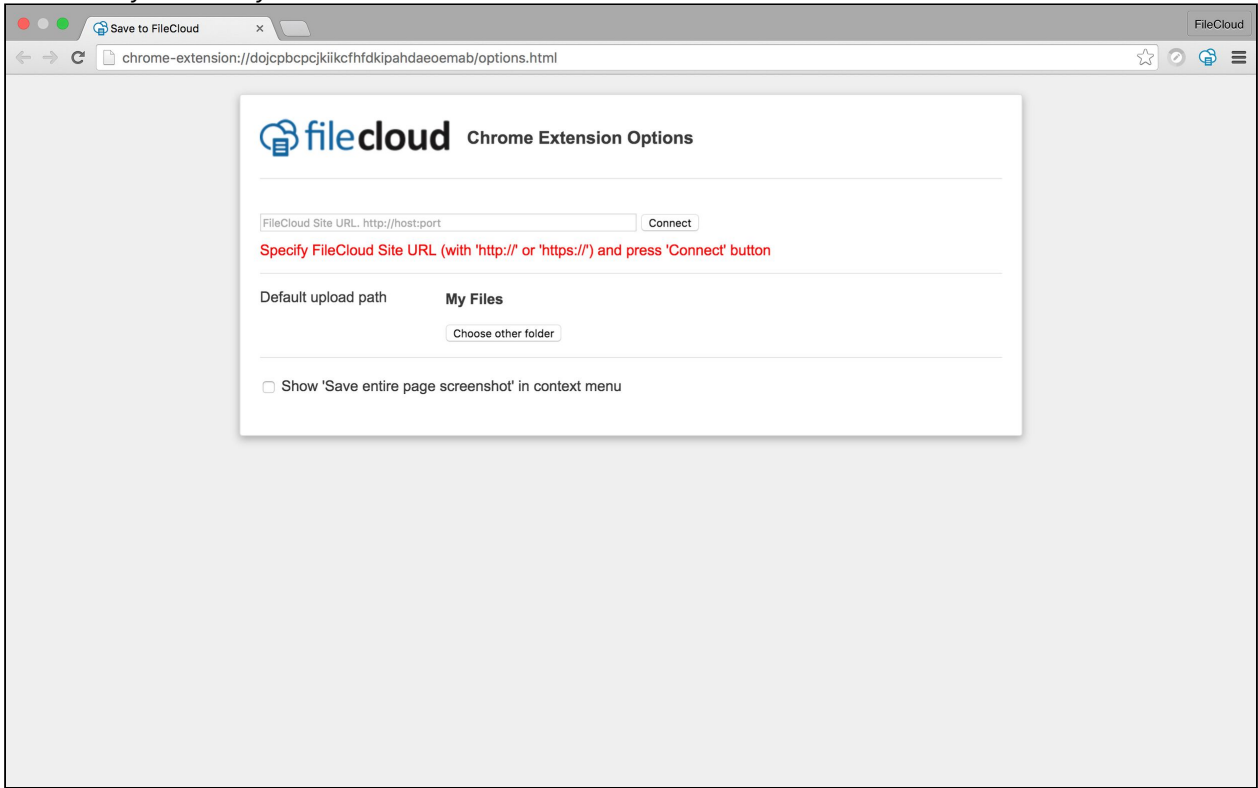
WebDAV Client	Browsing Folders	Download Files	Create Folder	Delete Files/ Folders	Upload File
My WebDav (iOS)	YES	YES	YES	YES	YES
Finder (Mac OSX) *	YES	YES	YES	YES	YES
WebDrive (Windows)	YES	YES	YES	YES	YES
NetDrive 1.3.2 (Windows)	YES	YES	YES	YES	YES
CyberDuck 4.3.2 (Windows & OSX)	YES	YES	YES	YES	YES
Microsoft Windows Explorer	NO	NO	NO	NO	NO
Apple Pages (iOS)	YES	YES	NO	NO	NO
Office2 HD (iOS)	YES	YES	NO	NO	YES
OfficeSuite Pro (iOS & Android)	YES	YES	YES	YES	YES
Documents (iOS)	YES	YES	YES	YES	NO
Dav -E (iOS)	YES	NO	YES	YES	YES
Kingsoft Office (iOS & Android)	YES	YES	NO	NO	NO
Transmit (Mac OSX)	YES	YES	YES	YES	YES

## Save to FileCloud Chrome Browser Extension

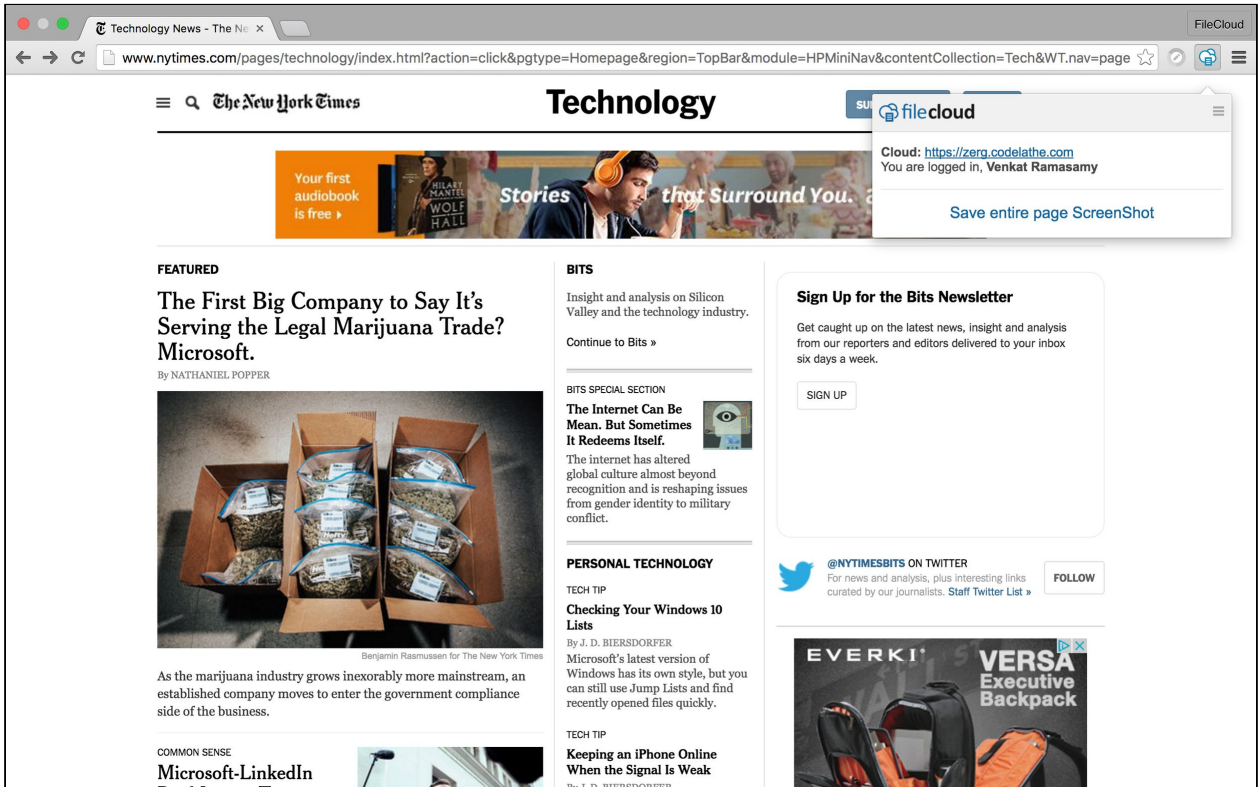
Save to FileCloud chrome extension allows users to right click any file (documents, images, audio and video) and save to FileCloud. One can take screenshots of entire page and save to their respective FileCloud account. This extension is useful in activities such as product research, market research, web design and others. Users can also choose the target folder where one want to store the files.

This extension is available to install from the [Chrome Web Store](#).

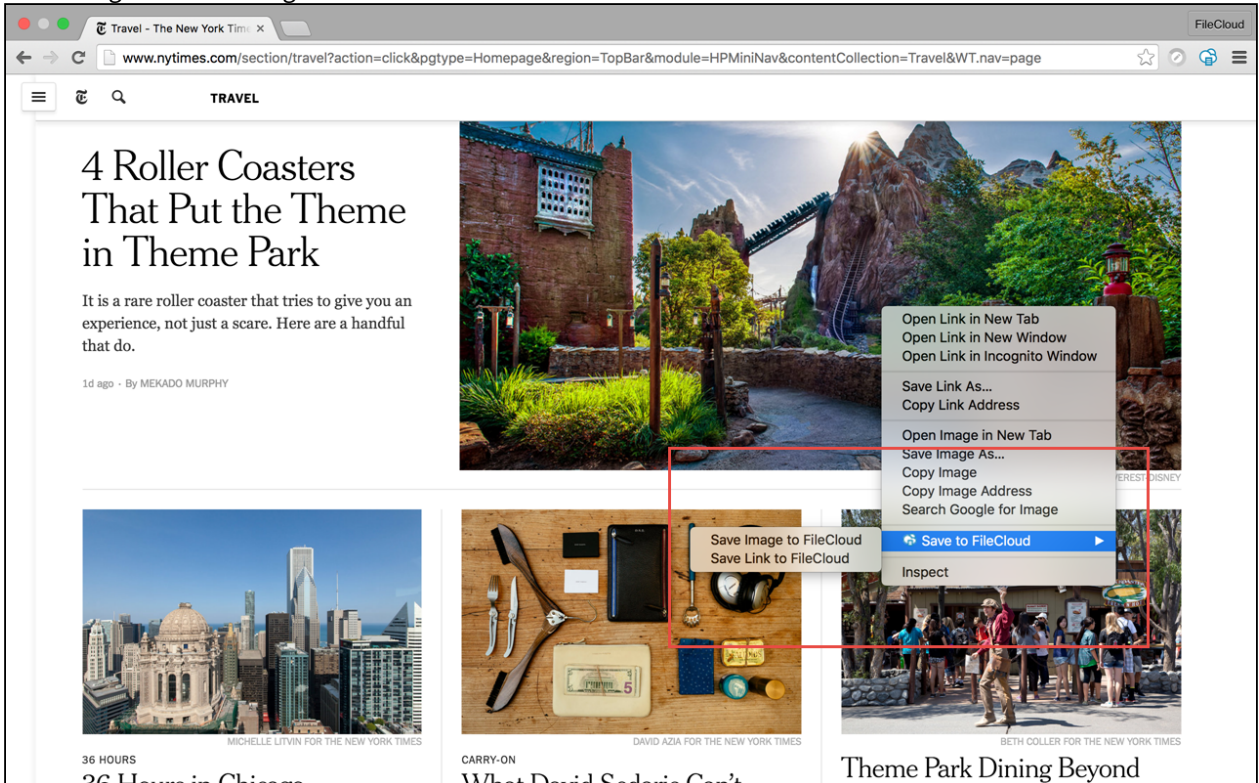
1. Install the extension in your browser. Once the extension is installed, Please set your FileCloud site URL and click connect. If you have not logged into your FileCloud portal, you need to first login. The default upload path for files is My Files. But you can choose an another folder.



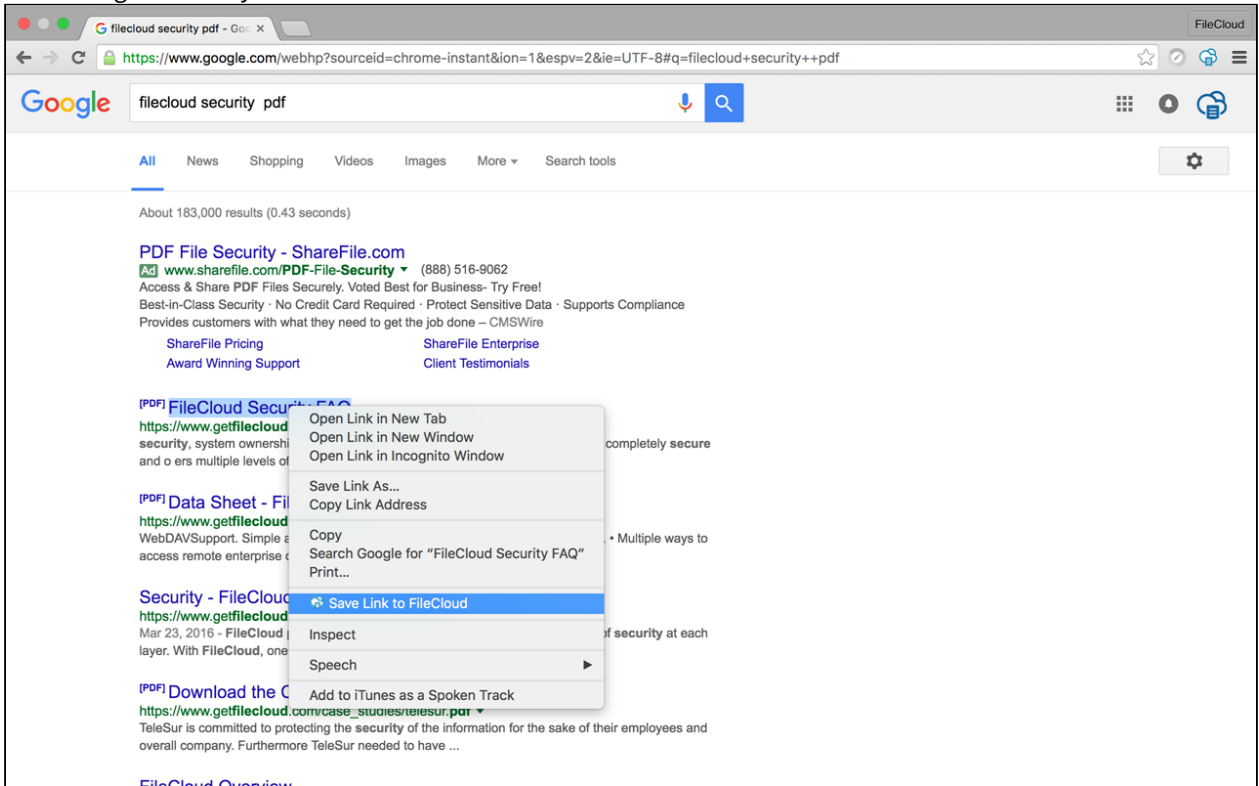
2. You can take page screenshot by clicking the "Save entire page ScreenShot". The screenshots are automatically uploaded to your FileCloud target directory that you specified. This action is also available from browser context menu.



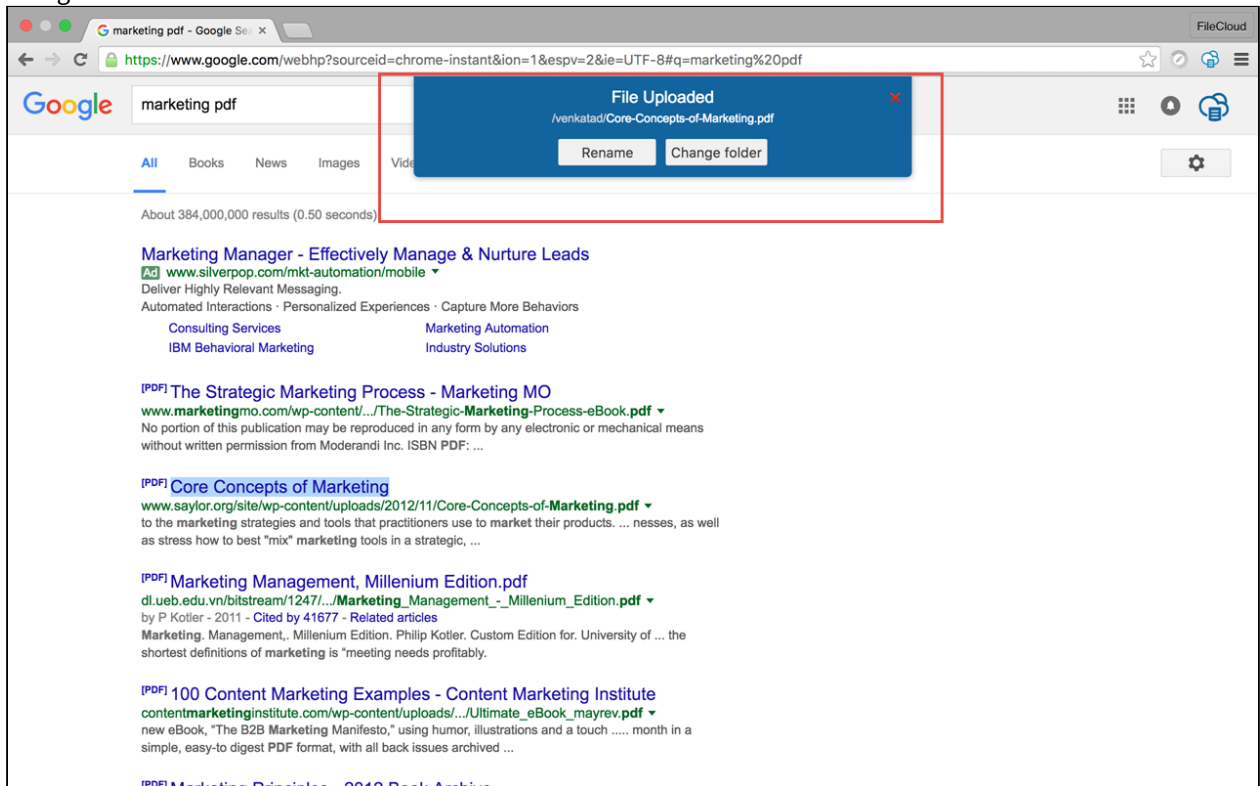
3. You can right click an image and Save to FileCloud.



4. You can right click any document and save that file to FileCloud.



5. You can right click any file and save that File to FileCloud. While saving, you can also rename the file name and change the destination folder



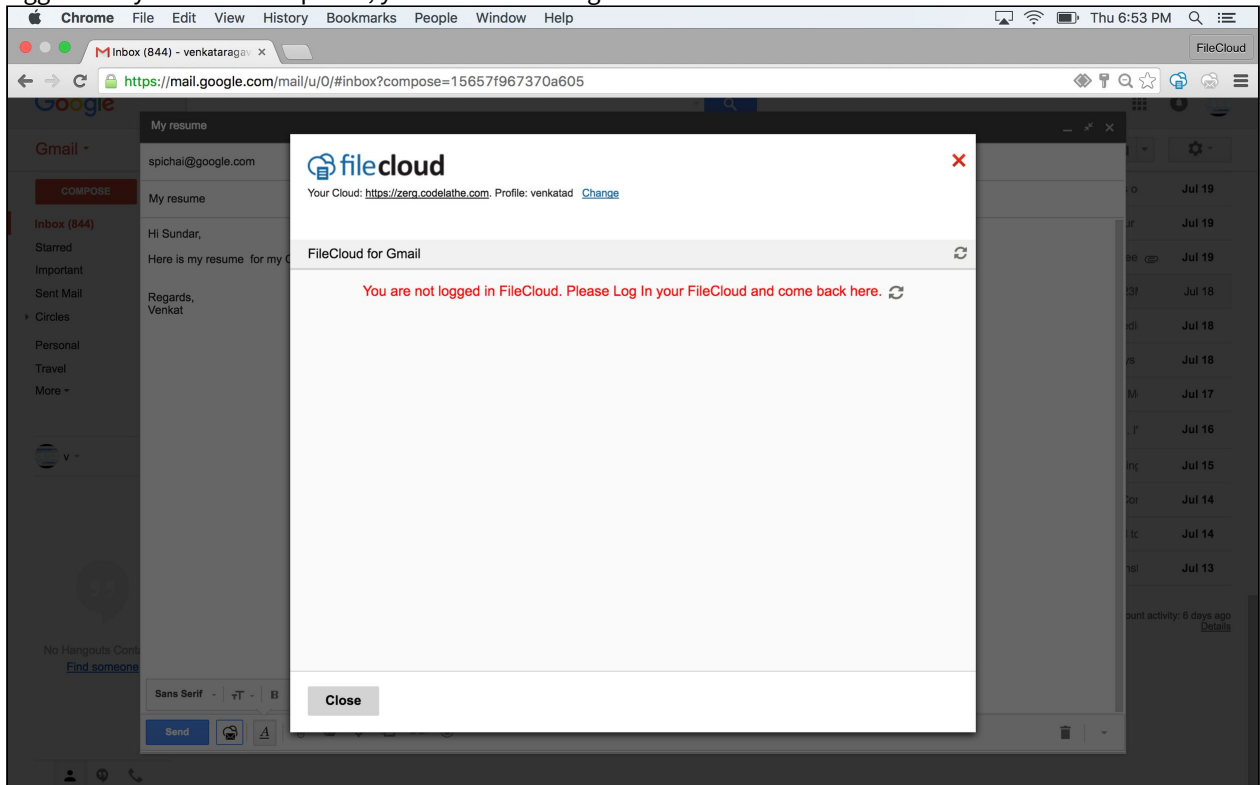
# FileCloud for Gmail Browser Extension

FileCloud for Gmail chrome extension enables users to share files directly from FileCloud without leaving their Gmail compose window. When users share files they can share it as a FileCloud link or as a regular file attachment.

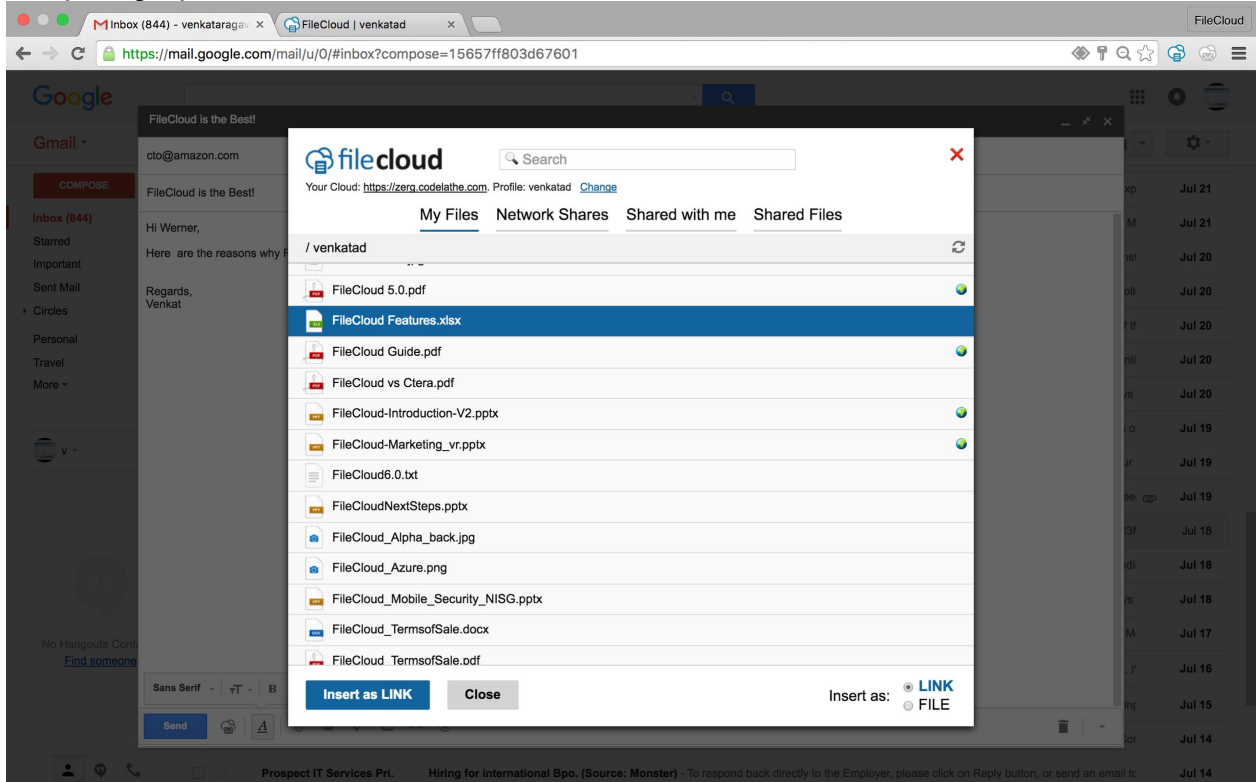
Users can also store email attachments directly to FileCloud from Gmail. One can also quickly find files using FileCloud search tool to share the file. This extension is really useful for organizations who use Gmail as their primary email app.

This extension is available to install from the [Chrome Web Store](#).

1. Install the extension in your browser and click the FileCloud icon on the Gmail compose window. If you have not logged into your FileCloud portal, you need to first login

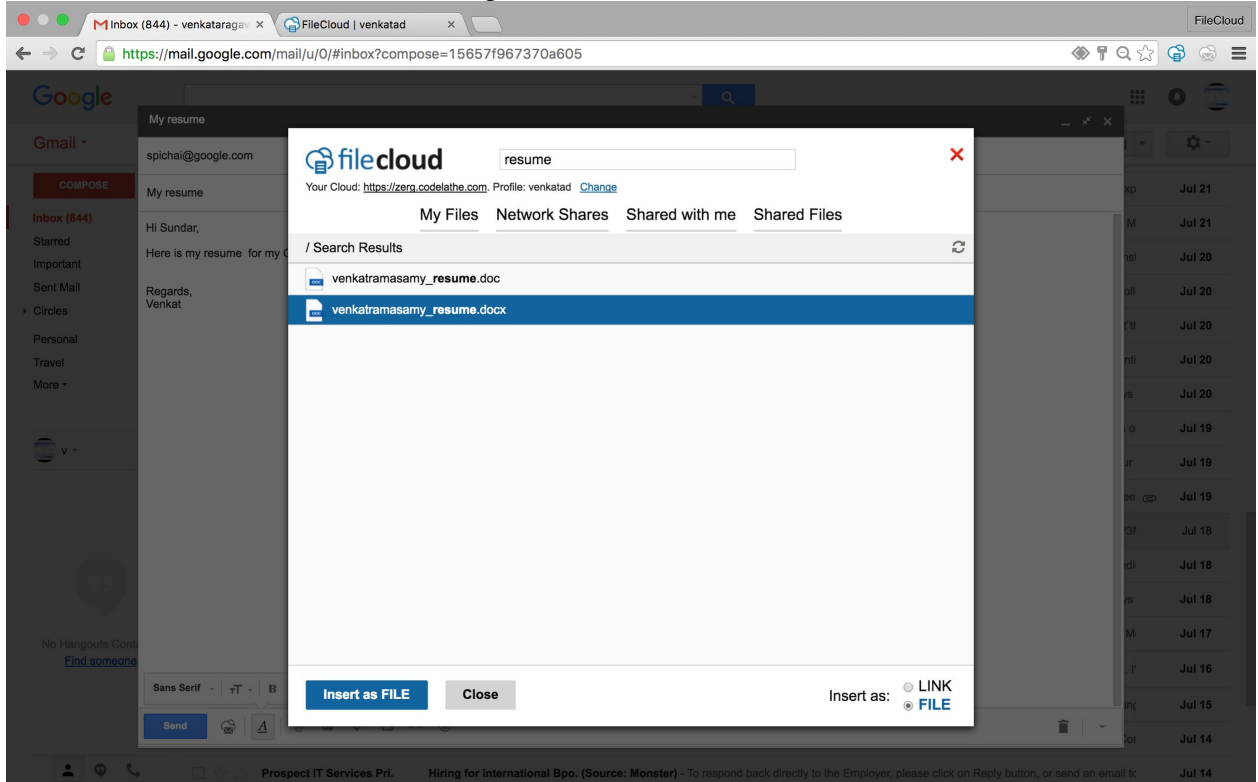


2. Once you login, you can select a file to share as a link or on attachment.

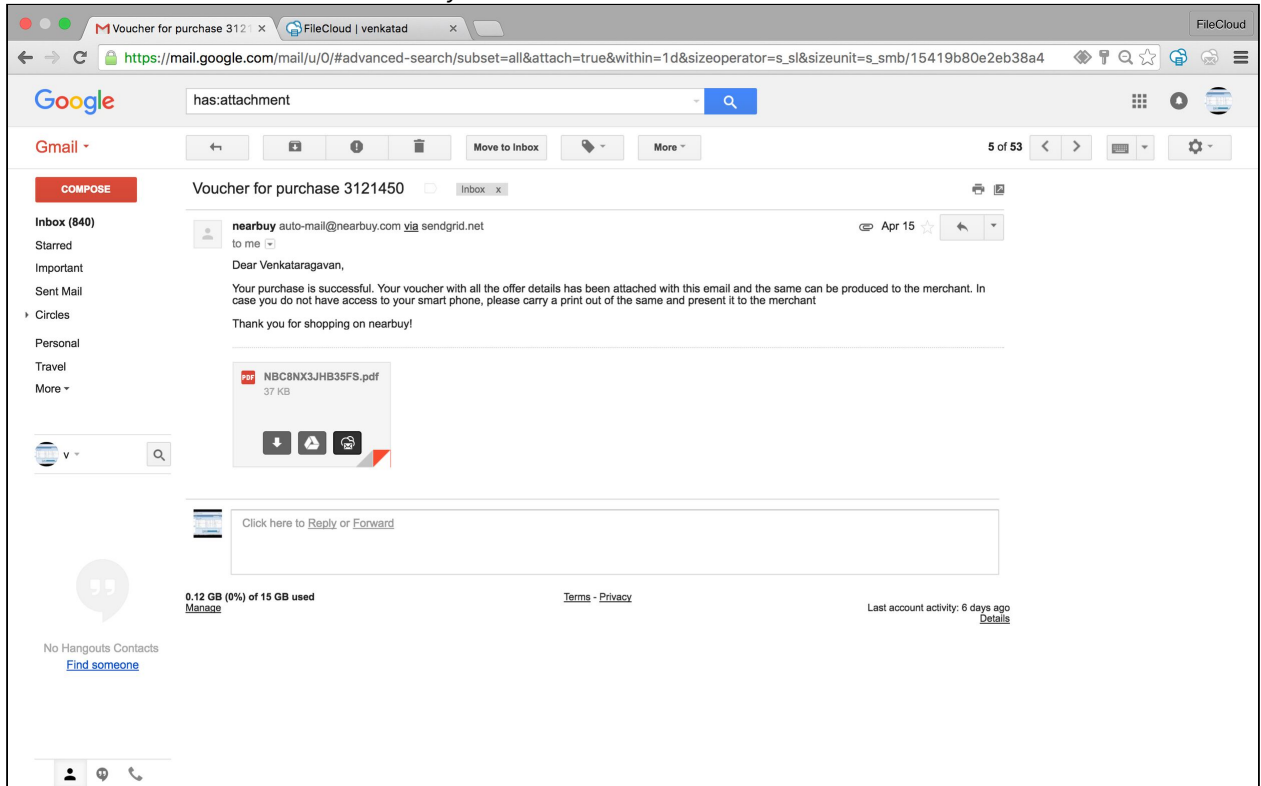




3. You can also search for a file and share as a gmail attachment.



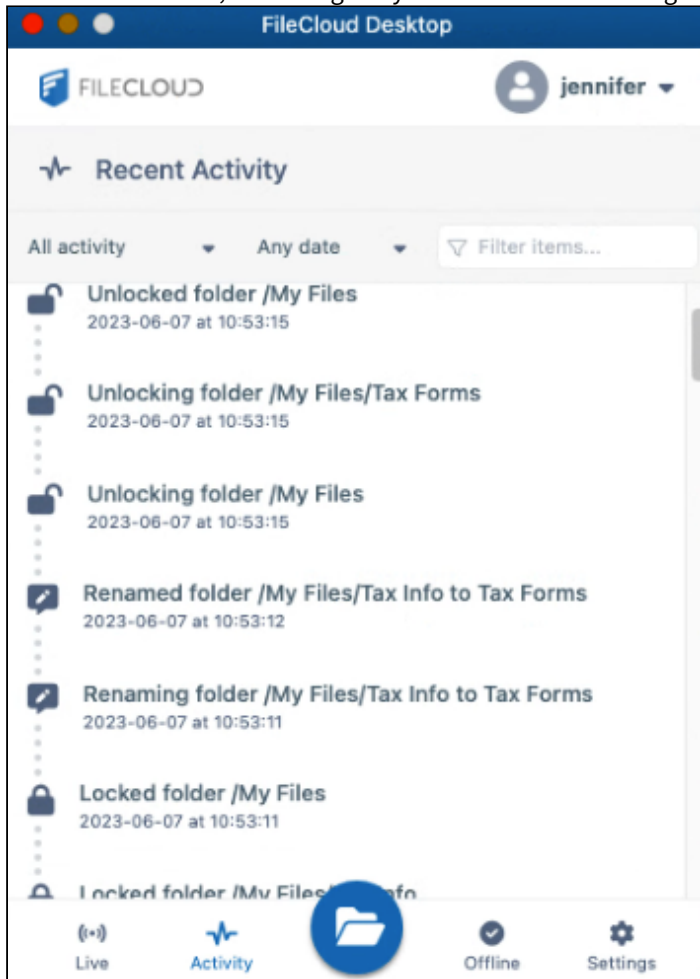
4. One can also save an attachment directly to FileCloud.



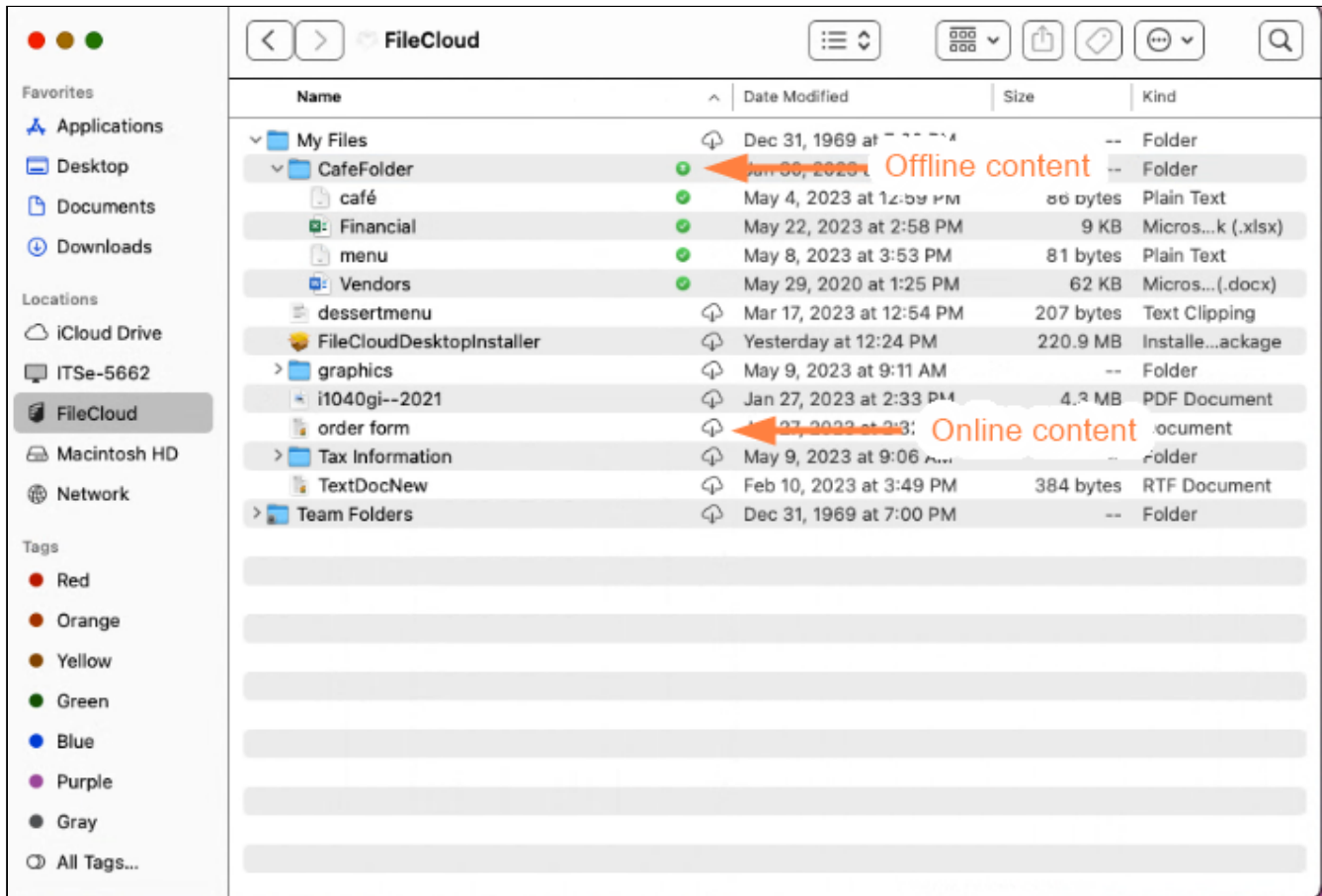
## FileCloud Desktop for macOS

FileCloud Desktop for macOS enables you to access your FileCloud files and folders in Mac's Finder, where you can work with them online or make them available offline. Changes you make to offline files stored in FileCloud are immediately synced to the copies in FileCloud.

FileCloud Desktop for macOS opens as a dashboard that shows you live and recent actions and the folders you have downloaded offline, and also gives you access to user settings:



When you open FileCloud Desktop, its **FileCloud** folder becomes available in your Finder. From there, you can work with your files online, or download them and work with them offline. Your online files and folders appear with cloud icons beside them. When you work with them, you are working with the copies in FileCloud, and if you view your user portal, you can see that the modifications there. Your downloaded folders and their files are marked with green icons with check marks. When you work with them, you are working with downloaded copies of the files, but your changes are immediately synchronized to FileCloud.



FileCloud Desktop automatically installs with [FileCloud for Office \(FFO\)](#), which enables you to automatically lock and unlock Office files and share them when you open them from the FileCloud Desktop directory.

Begin by [installing FileCloud Desktop](#), and then try out its various functions.

## Installing FileCloud Desktop for macOS

FileCloud Desktop is supported on macOS Monterey 12.5.1 and higher.

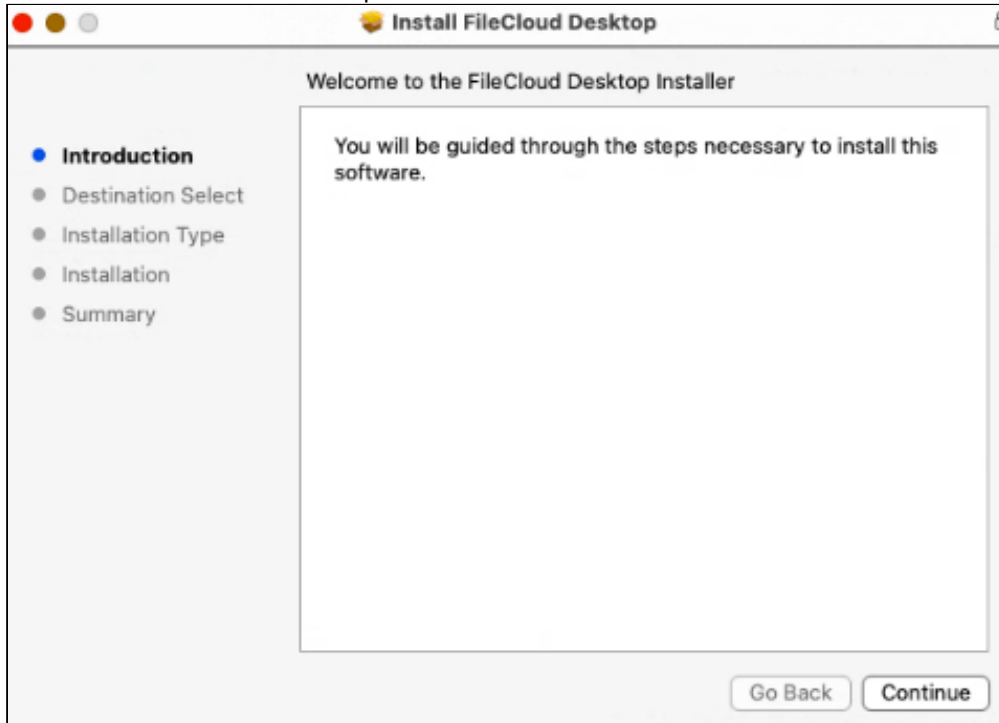
You must have FileCloud 23.1 installed in order to use FileCloud Desktop for macOS.

### To install FileCloud Desktop on macOS:

1. Install or upgrade to FileCloud 23.1 if you have not already done so.

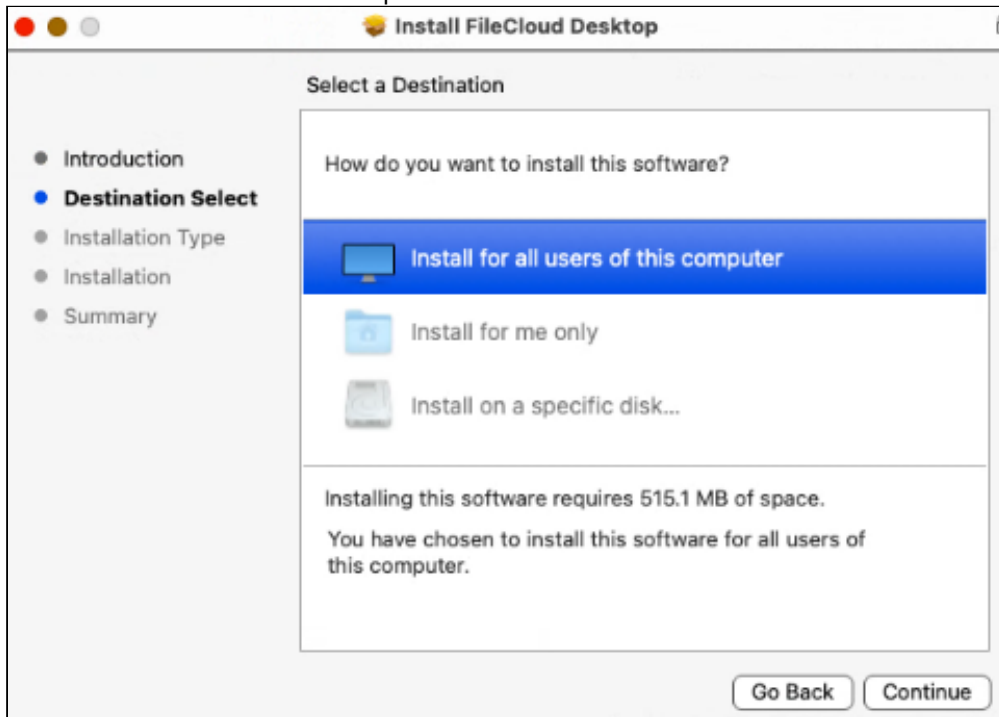
- Unzip and run **FileCloudDesktopInstaller.pkg**.

The installer's welcome screen opens:

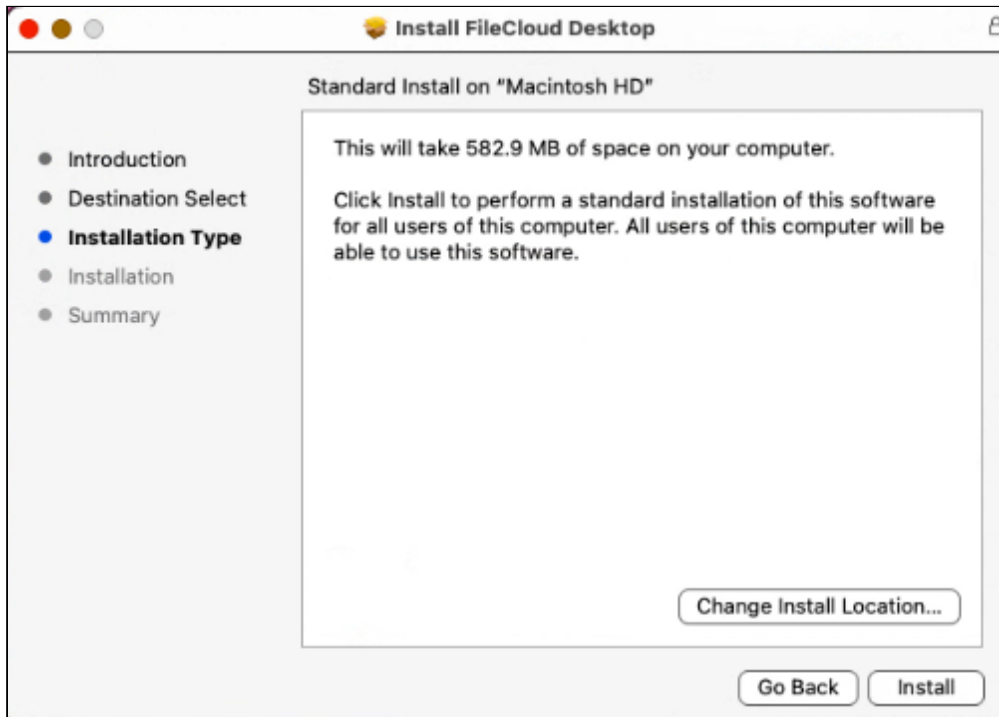


- Click **Continue**.

The **Select a Destination** screen opens.

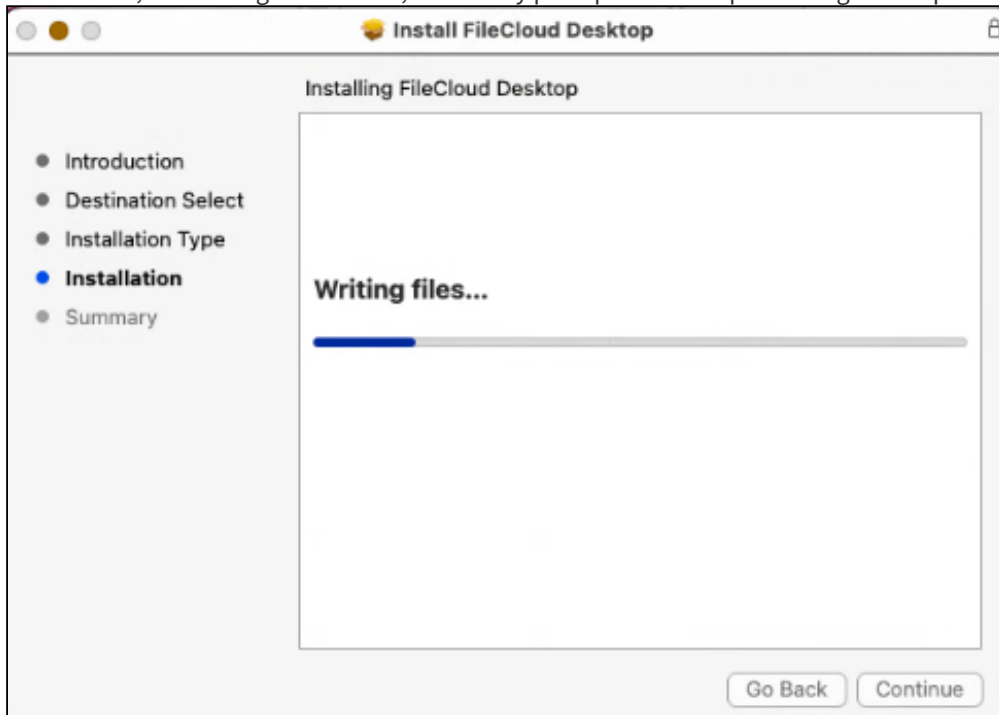


- Leave Install for all users of this computer or select a different option, then click **Continue**. The **Installation Type** screen opens.

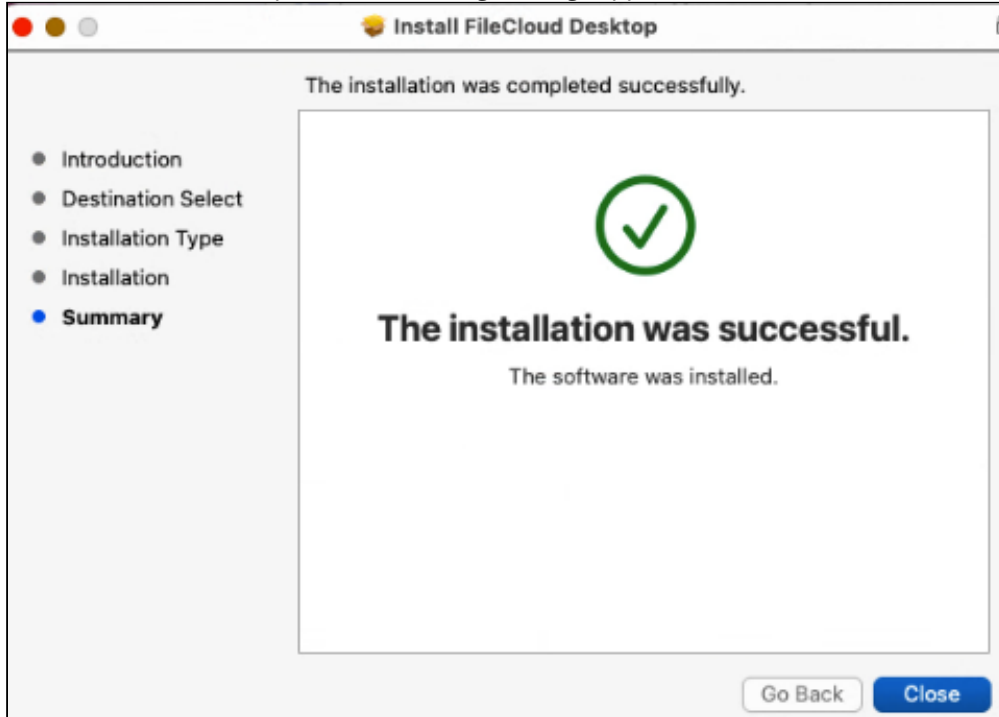


By default, FileCloud Desktop is installed in your **Apps** folder.

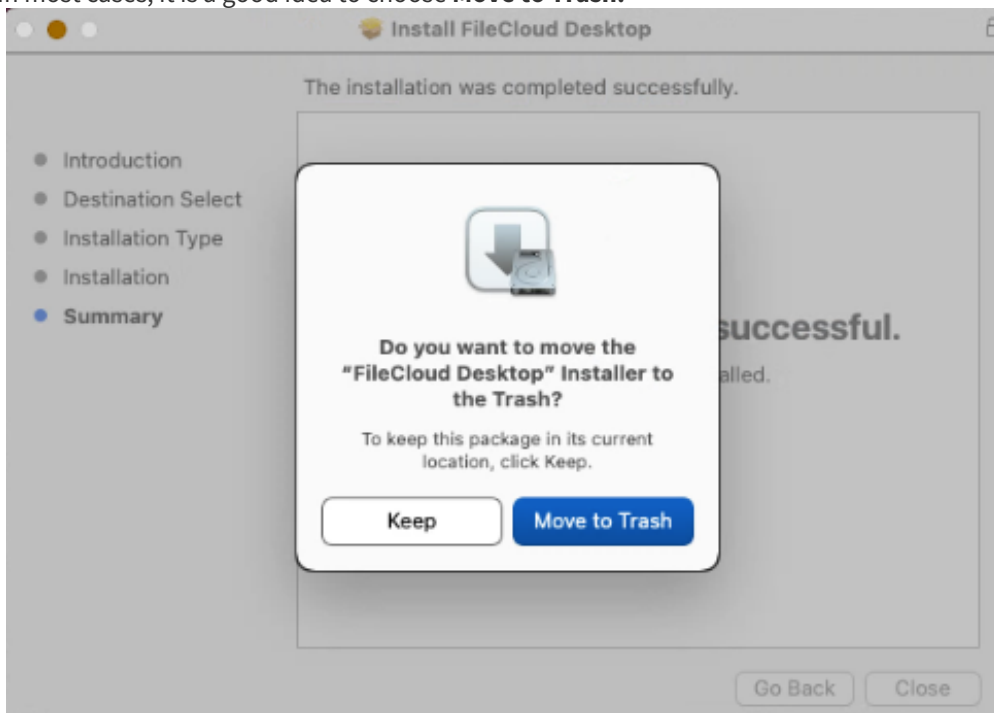
5. To install it in another location click **Change Install Location**.
6. Click **Install**, and during installation, follow any prompts to allow processing to complete.



When installation is complete, the following message appears:

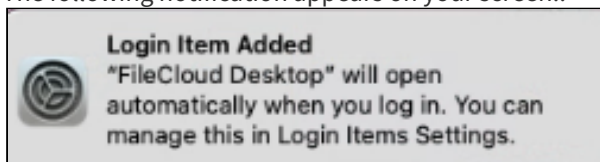


7. Click **Close**.  
The following message prompting you to move the installer application into your trash folder appears.
8. In most cases, it is a good idea to choose **Move to Trash**.



When installation is complete, the FileCloud Desktop login page opens.

The following notification appears on your screen..



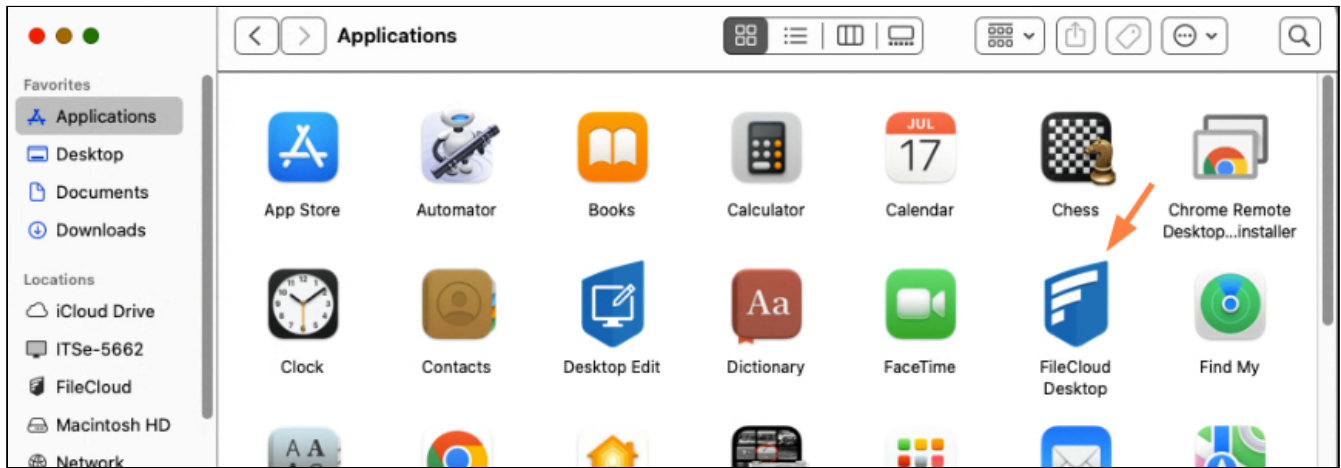
9. If you do not want FileCloud Desktop to open automatically when you log in, you can change the setting after you log into the application.  
If you do not want related software running in the background, change it in your System Settings in **General > Login Items**.

## Opening and Logging in to FileCloud Desktop in macOS

Initially, the login page for FileCloud Desktop opens after you install it. After that, by default, it opens automatically when you start up your computer. If you do not want it open automatically on startup, you can change the [setting in FileCloud Desktop](#).

To open FileCloud Desktop's login screen from macOS Finder, double-click the icon in your **Applications** folder.





**Log in with password**

Leave **Password** selected for **Login Method**, and enter your **Server URL**, **Account Name** (username), and **Password** into the **Log in** screen, and click **Log in**:

FileCloud Desktop

# Welcome

## Log in to your account

Please log in using one of the methods below.

Login Method  Password  SSO  Device Authorization Code

Server URL  ✓

Account Name  ✓

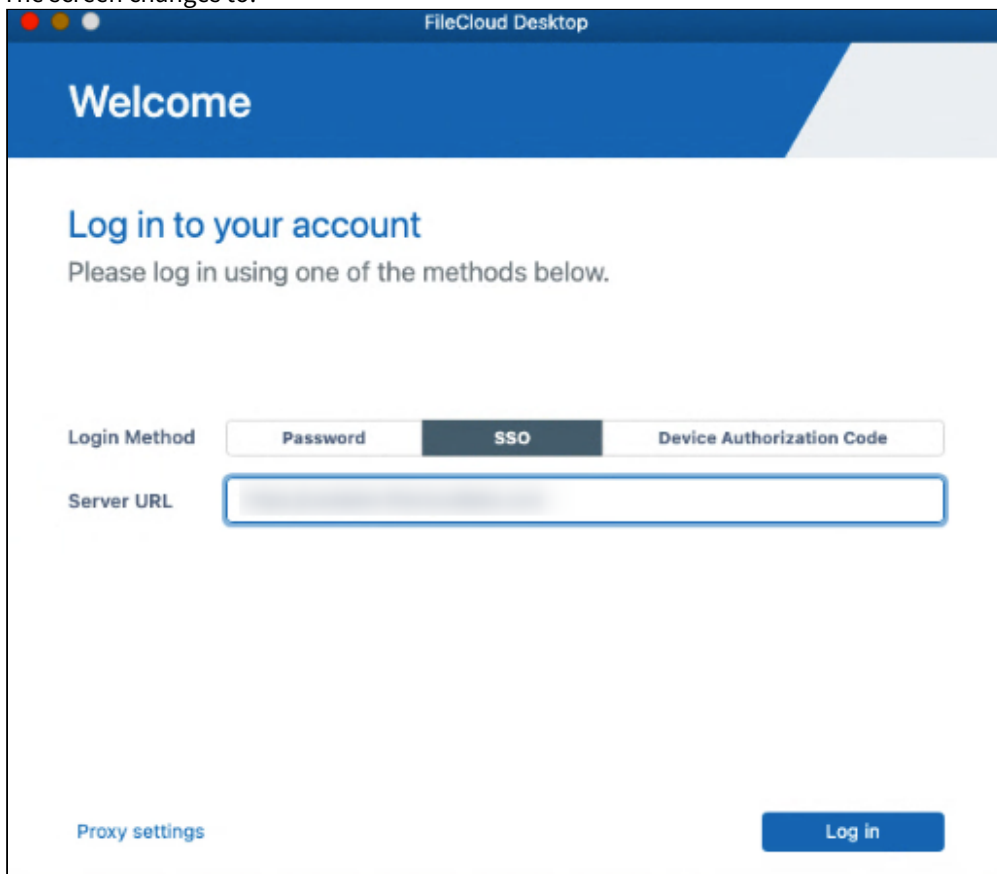
Password

[Proxy settings](#)

### Log in with SSO

1. Select **SSO** for **Login Method**.

The screen changes to:



FileCloud Desktop

# Welcome

## Log in to your account

Please log in using one of the methods below.

Login Method

Password SSO Device Authorization Code

Server URL

[Proxy settings](#) [Log in](#)

2. Type the address to the FileCloud server that was sent to you when your FileCloud account was created. You are redirected to the **SSO Login** page, where you can enter your username and SSO password to log in.

Sign In

# Filecloud ADFS

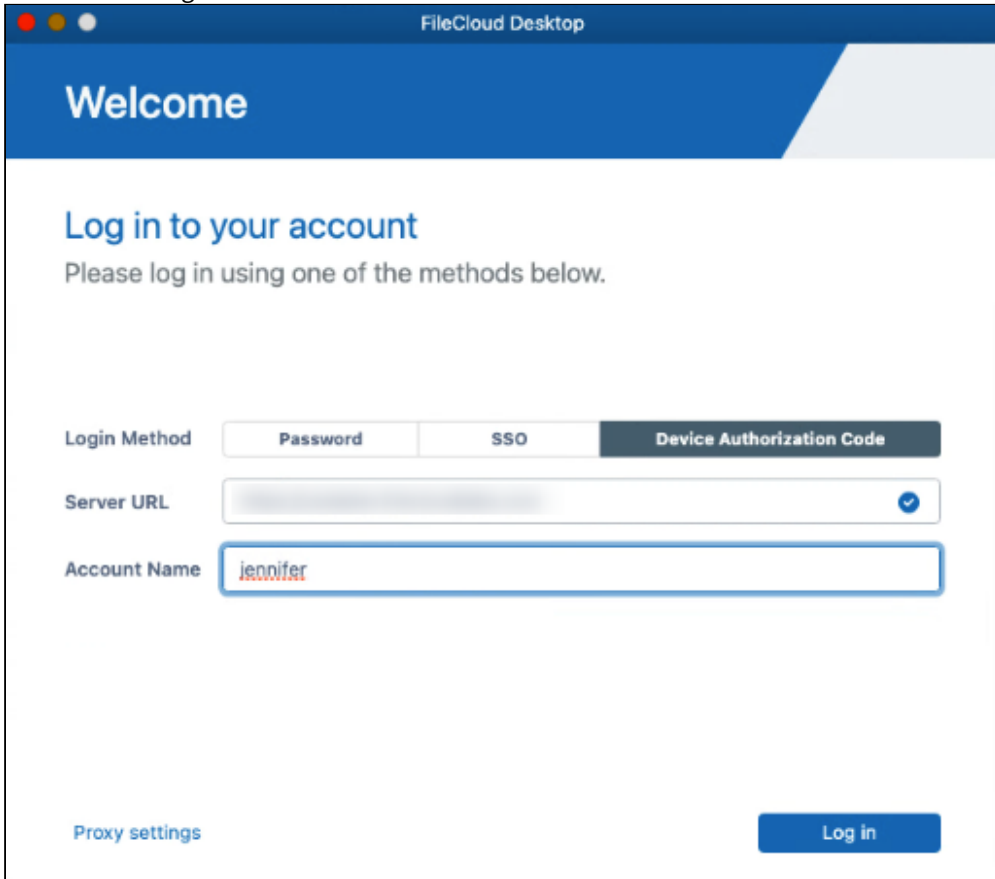
Sign in with your organizational account

Sign in

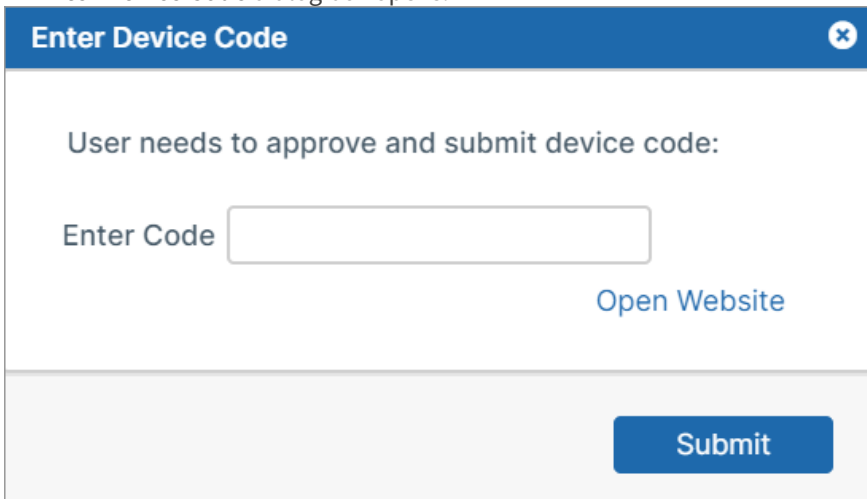
© 2013 Microsoft

### Log in with Device Authorization Code

1. Select **Device Authorization Code** for **Login Method**.  
The screen changes to:

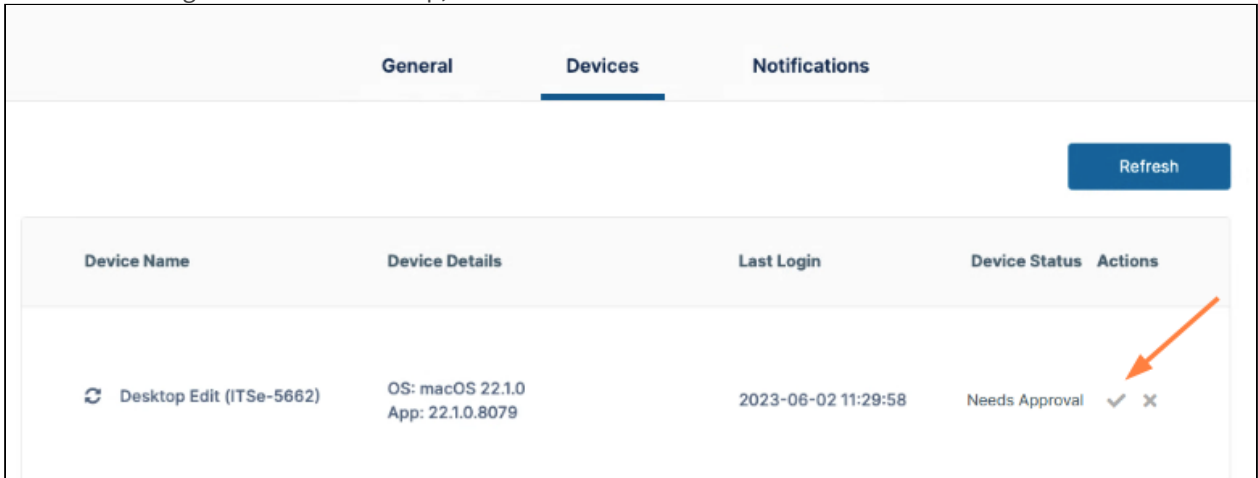


2. Enter your **Server URL** and **Account Name** (username).  
An **Enter Device Code** dialog box opens.



3. Click **Open Website**.  
The log-in screen of the user portal opens.
4. Log-in to the user portal.
5. In the upper-right corner of the screen, click your username and choose **Settings**.

- In the **Settings** screen, click **Devices**.
- Next to the listing for FileCloud Desktop, click the check.

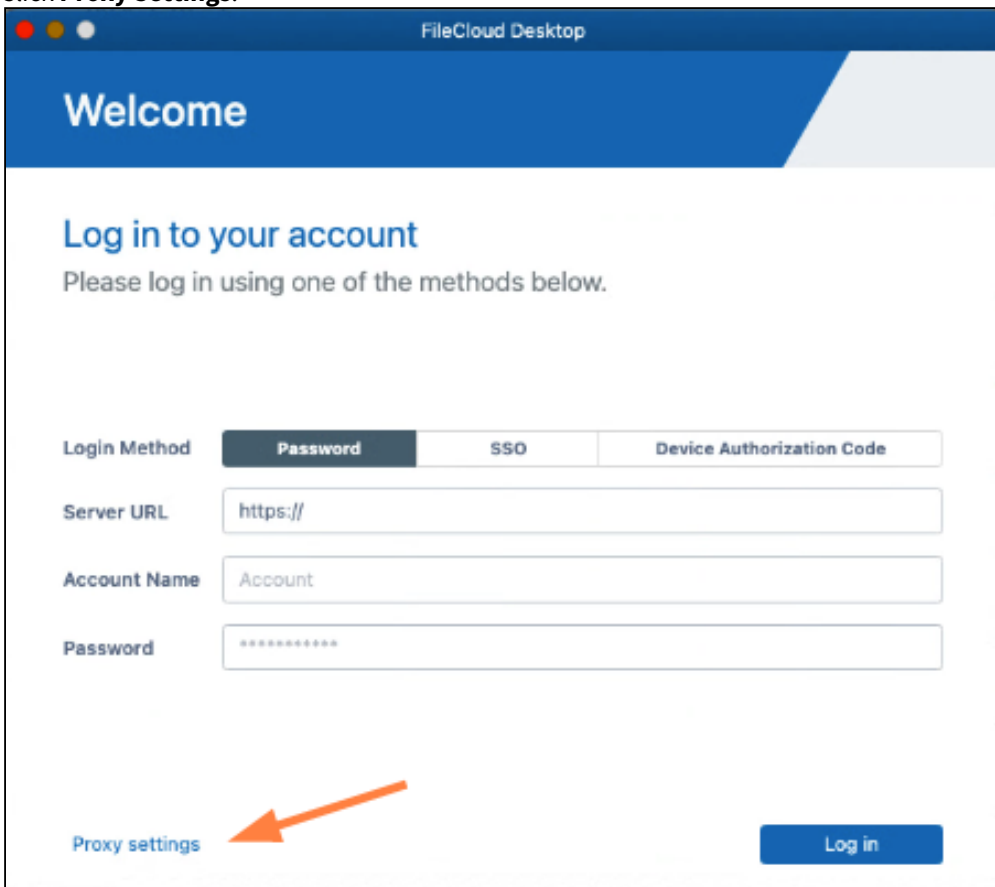


A dialog box with the device authentication code opens.

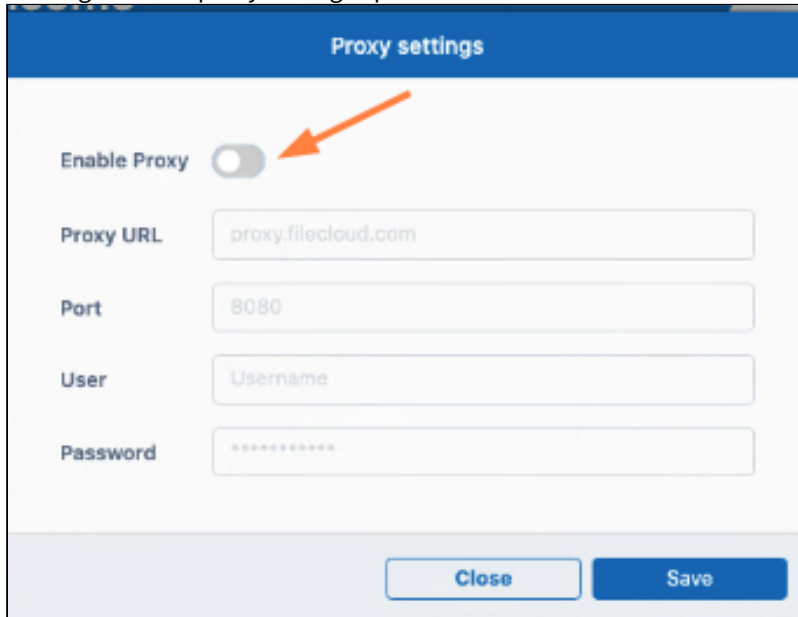
- Enter the authentication code into the **Enter Device Code** dialog box, and click **Submit**.

### Log in using Proxy Settings

- Click **Proxy Settings**.



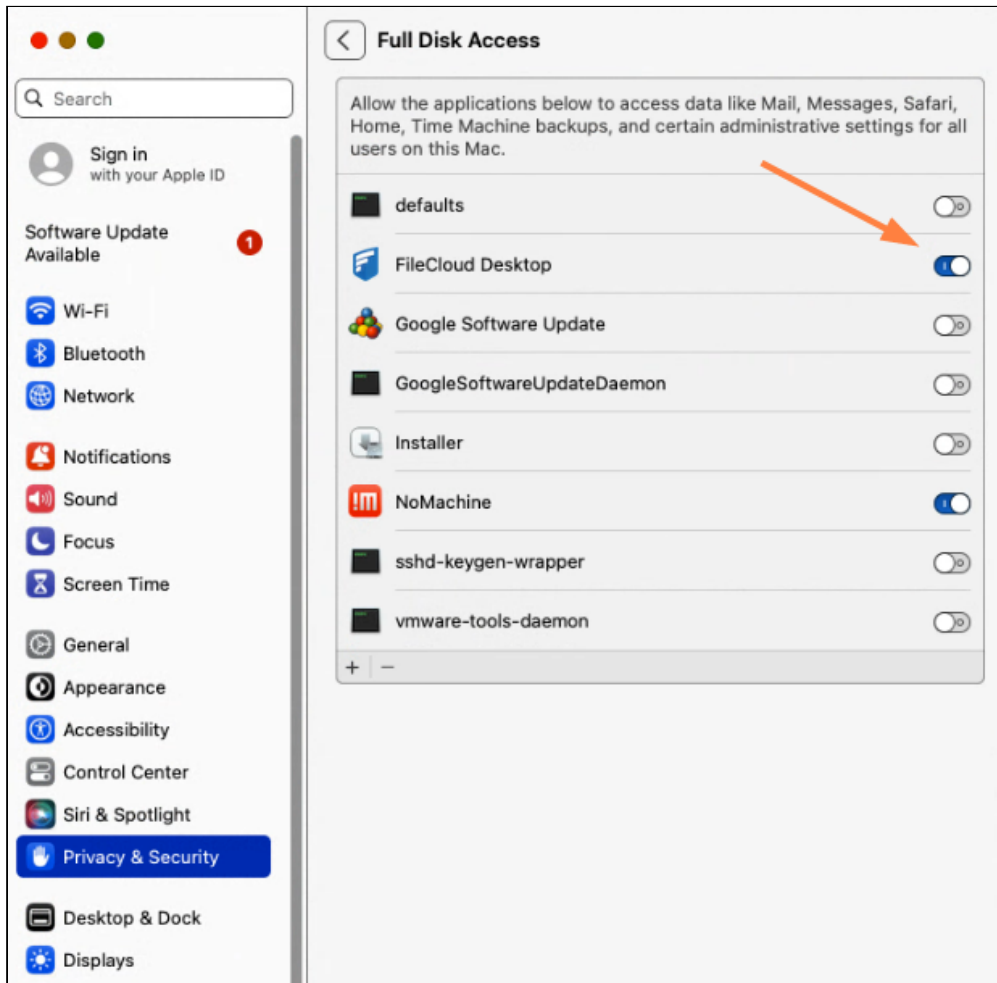
A dialog box with proxy settings opens:



The screenshot shows a 'Proxy settings' dialog box. It features a blue title bar at the top. Below the title bar, there is a section for 'Enable Proxy' with a toggle switch that is currently turned off. An orange arrow points to this toggle switch. Below this are five input fields: 'Proxy URL' containing 'proxy.filecloud.com', 'Port' containing '8080', 'User' containing 'Username', and 'Password' containing a masked value of '\*\*\*\*\*'. At the bottom of the dialog, there are two buttons: 'Close' and 'Save'.

2. Click the **Enable Proxy** slider to enable use of proxy settings.
3. Fill in the proxy settings.
4. Save your changes.

The first time you log in, you may be prompted to give **FileCloud Desktop** full disk access. Follow the prompts to go to **Settings > Privacy and Security > Full Disk Access** and enable **Full Disk Access** for **FileCloud Desktop**.



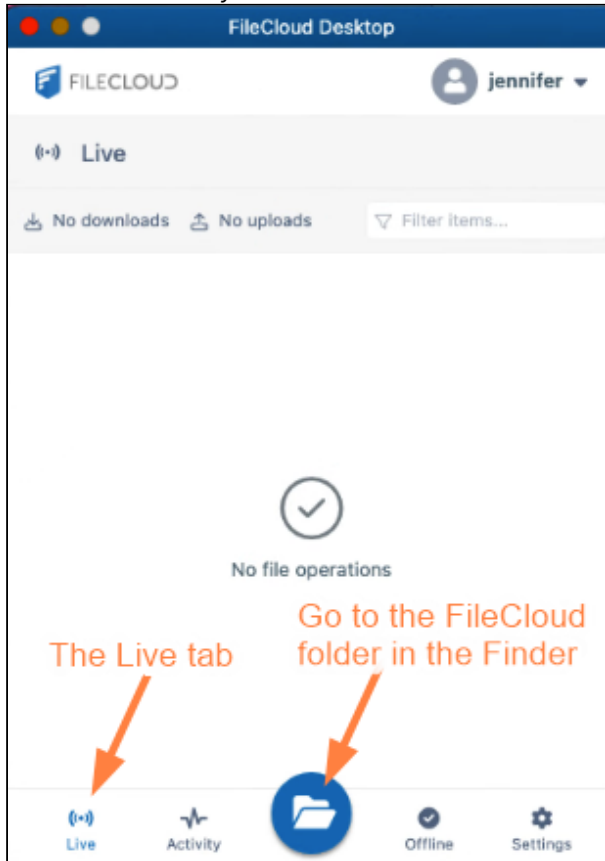
Once that is configured, login moves through a few screens introducing you to FileCloud Desktop, and then opens the FileCloud Desktop dashboard.

The dashboard opens to the **Live** screen. FileCloud Desktop cannot begin tracking and synchronizing online and offline FileCloud file activity until you download FileCloud folders and files to your local drive. So initially, the **Live** tab appears empty.

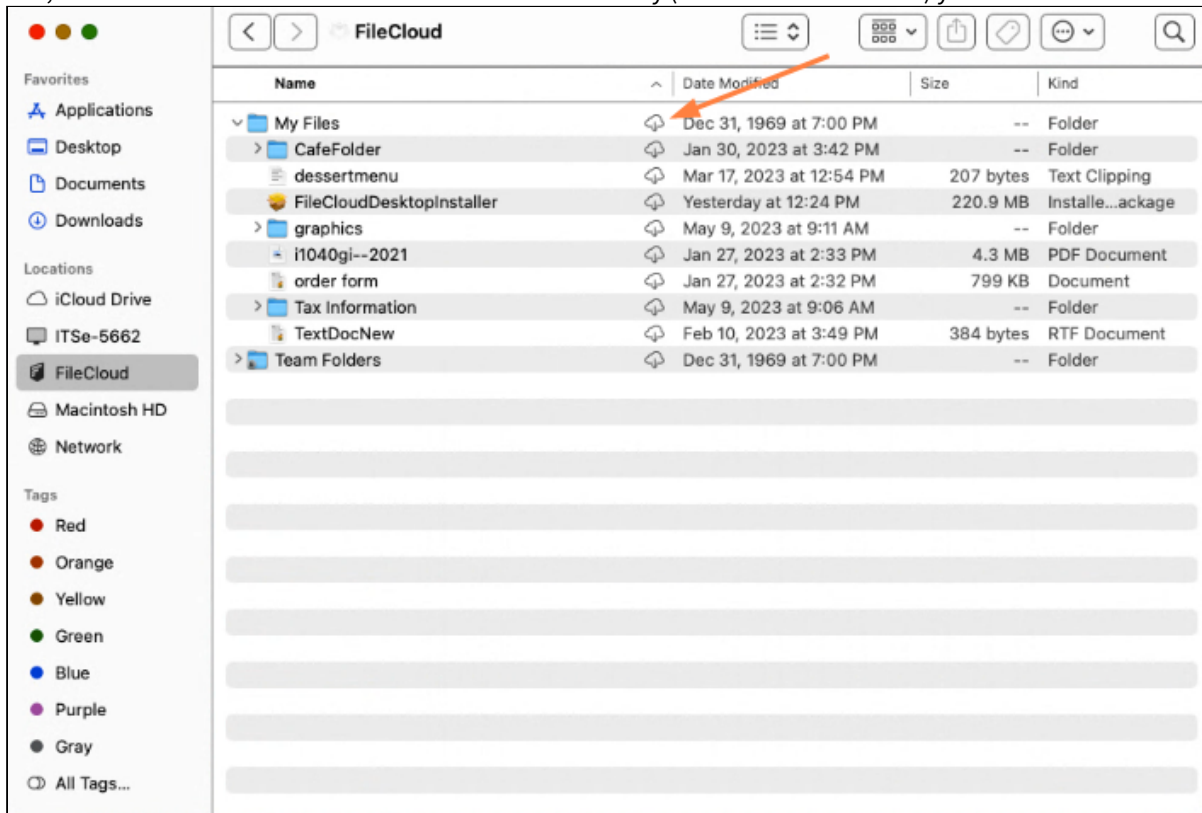
Click the folder icon at the bottom of the FileCloud Desktop dashboard to view the FileCloud folder, which now appears



under **Locations** in your finder.



If this is the first time you have logged in to FileCloud Desktop, each file and folder should appear with a cloud icon next to it, which indicates that it hasn't been downloaded locally (made available offline) yet.



Begin setting up FileCloud Desktop by [making FileCloud files and folders available offline](#).

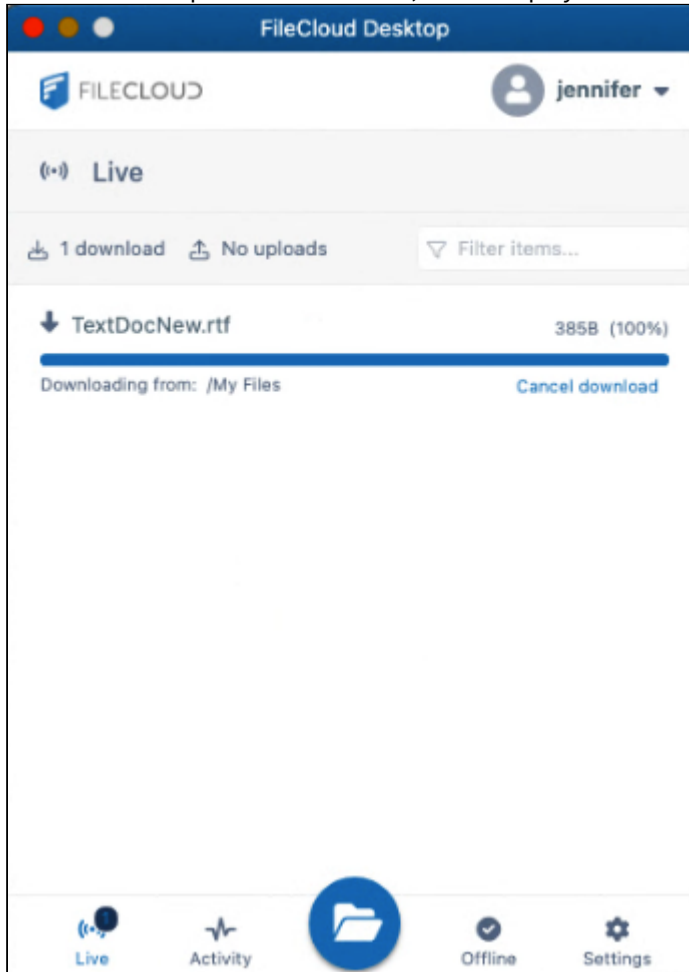
For more information about the dashboard, see [Using the Dashboard in FileCloud Desktop for macOS](#).

## Using the Dashboard in FileCloud Desktop for macOS

FileCloud Desktop for macOS opens to its dashboard, which has the tabs **Live**, **Activity**, **Offline**, and **Settings**, and a button for opening your FileCloud website (in the user portal).

### Live tab

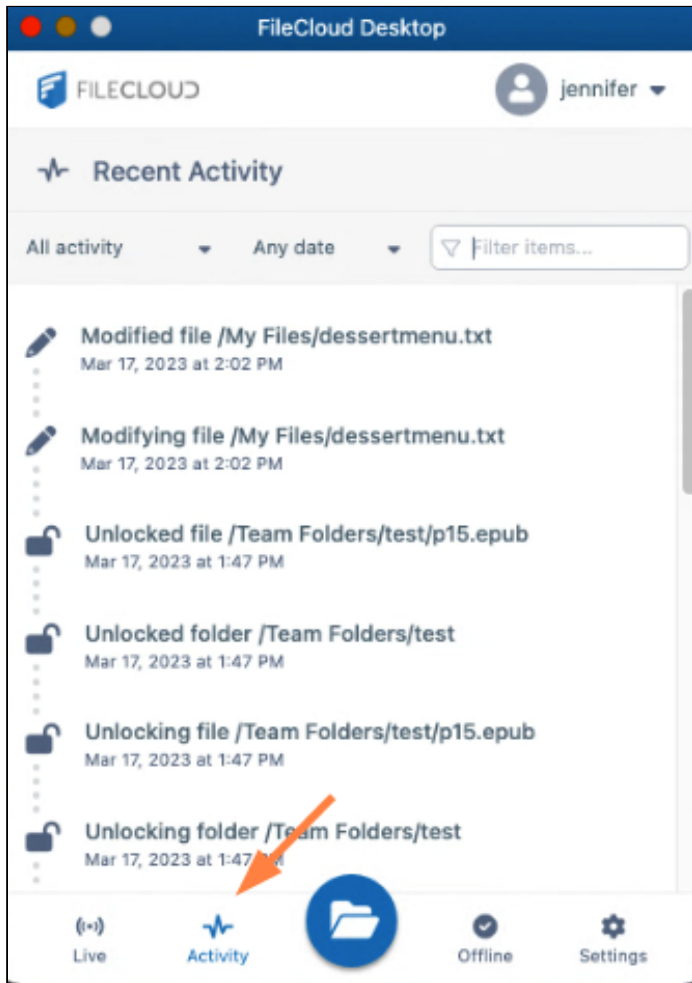
The dashboard opens to the **Live** tab, which displays a list of recently accessed files and folders:



- To search for a file or folder in the list, enter a string from its name into the **Filter items** box.

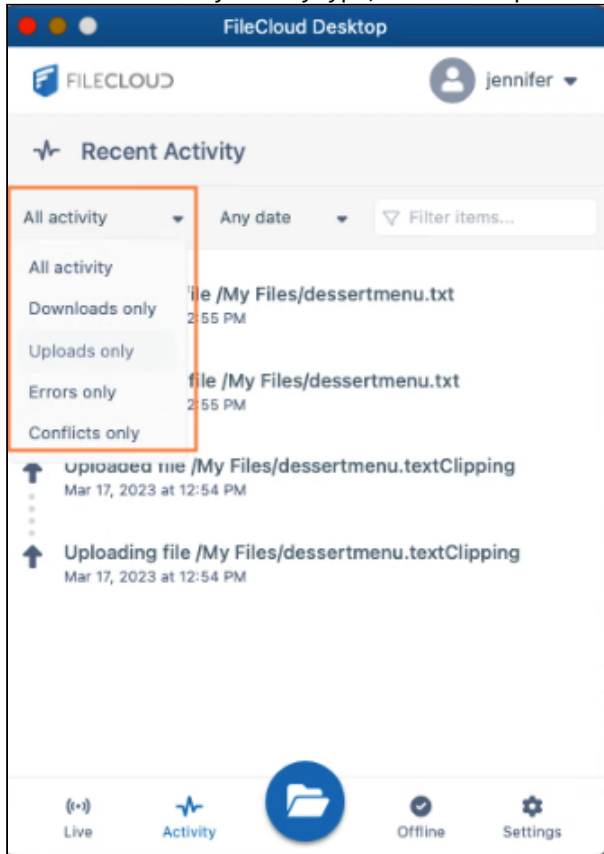
### Activity tab

To view a list of recent FileCloud Desktop activities, click the **Activity** tab:

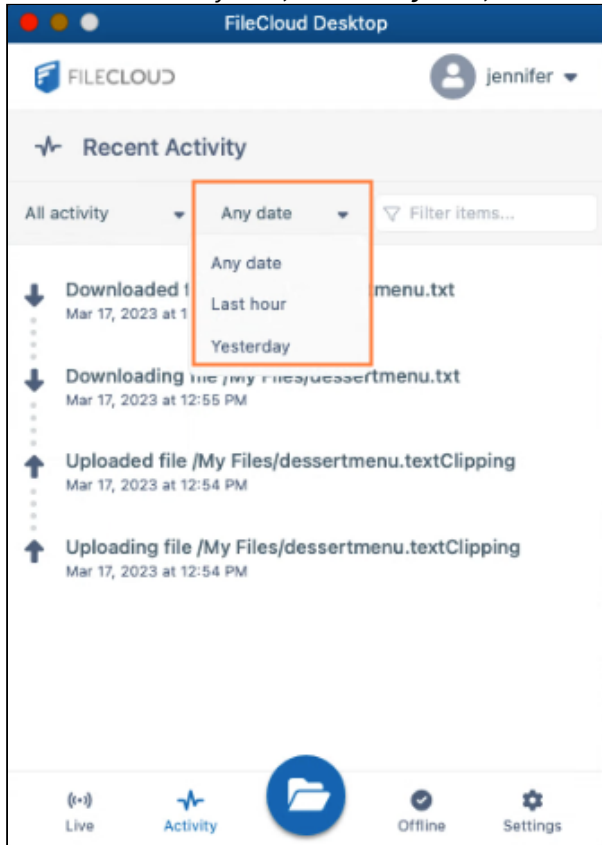


**To filter activities on the Activity tab**

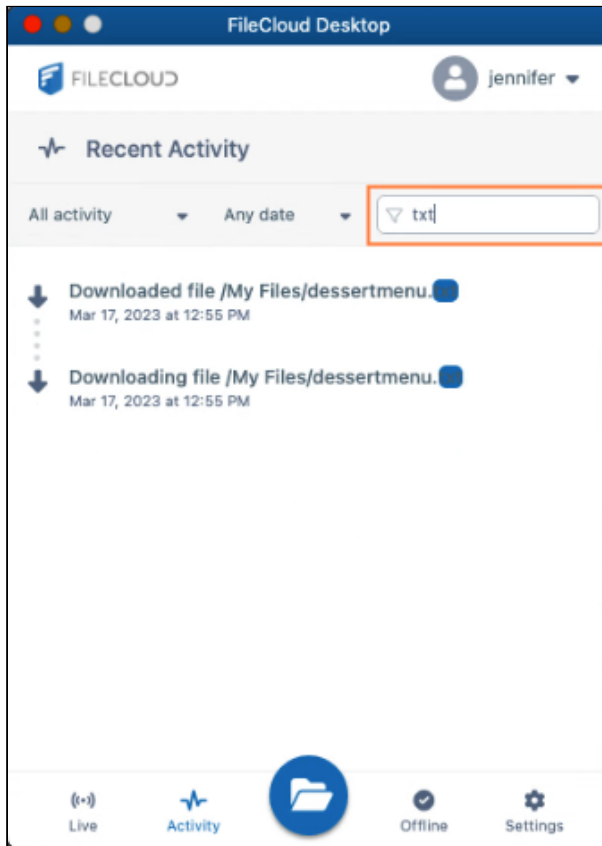
- To filter activities by activity type, choose an option in the Activity drop-down list.



- To filter activities by date, choose **Any date**, **Last hour**, or **Yesterday** in the Date drop-down list.

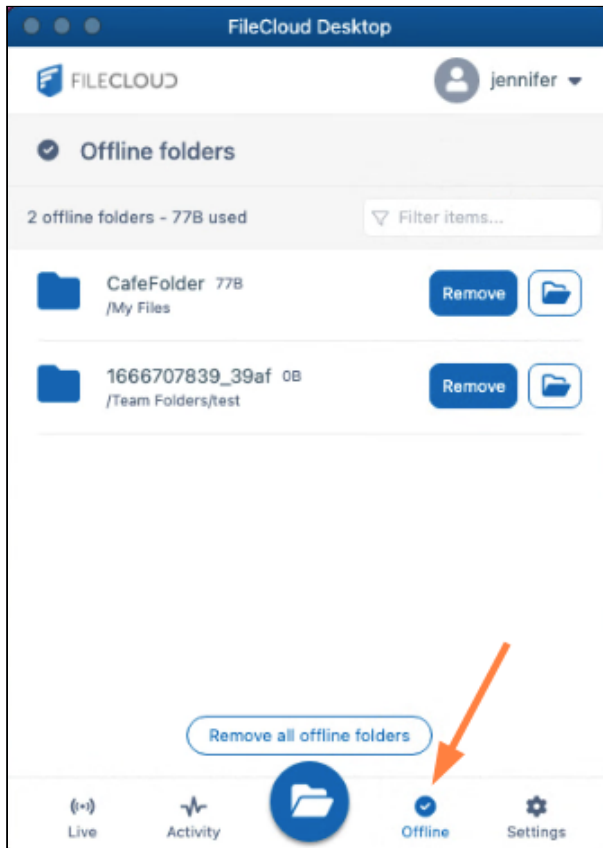


- To filter by any string in the listing (including the action, file path, date, or time) enter the string into **Filter items**.



### Offline tab

To view folders that you have [moved offline](#) using FileCloud Desktop, click the **Offline** tab.

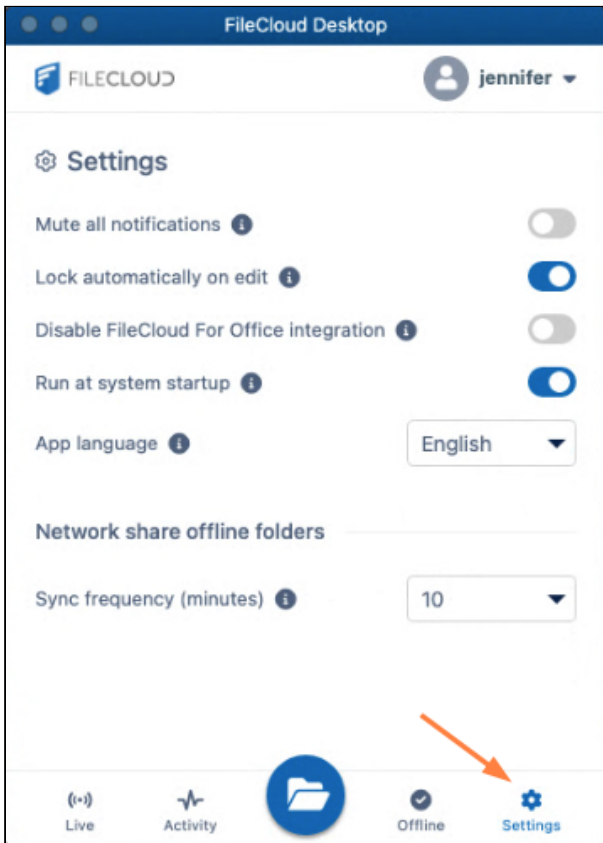


- To remove folders from the offline location from the **Offline** tab, see [Remove Files from Offline Folders](#).
- To open an offline folder in its location in Mac finder, click the folder icon next to it.

### Settings tab

To view FileCloud Desktop for macOS settings, click the **Settings** tab.

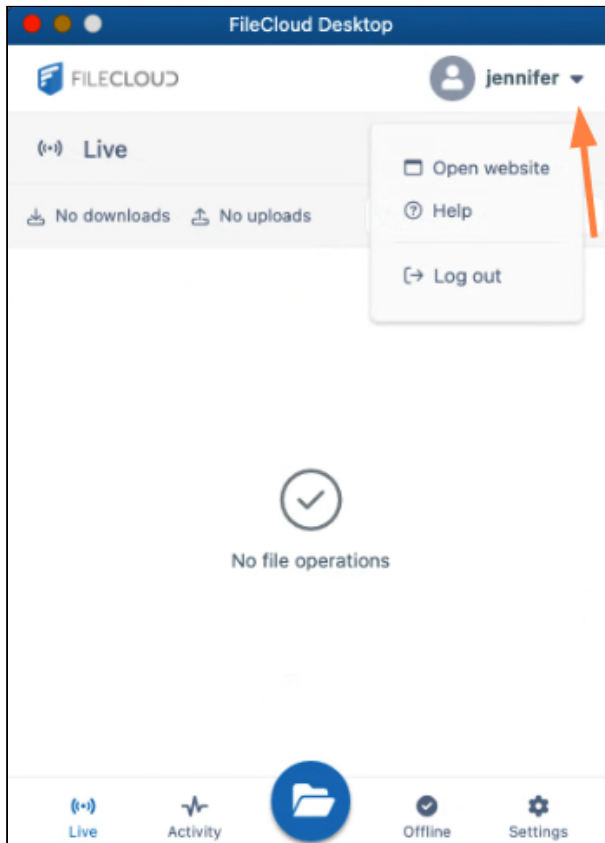




For information about FileCloud Desktop settings, see [FileCloud Desktop Settings](#).

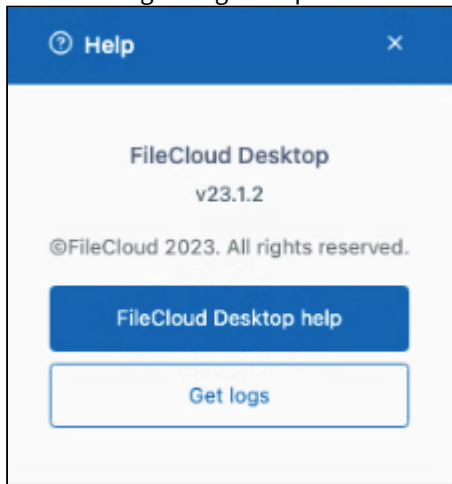
### More Options

To access more options from the FileCloud Desktop for macOS dashboard, click the down arrow next to your username:

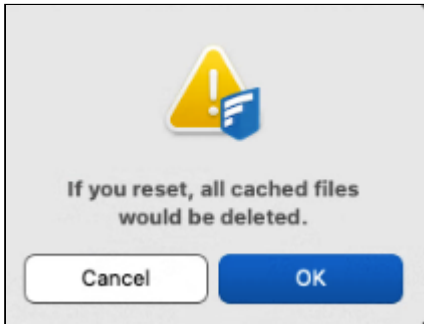


- To open your FileCloud user portal, click **Open website**.
- For this end user help and log files, as well as the version FileCloud Desktop for macOS that you are running click **Help**.

The following dialog box opens:



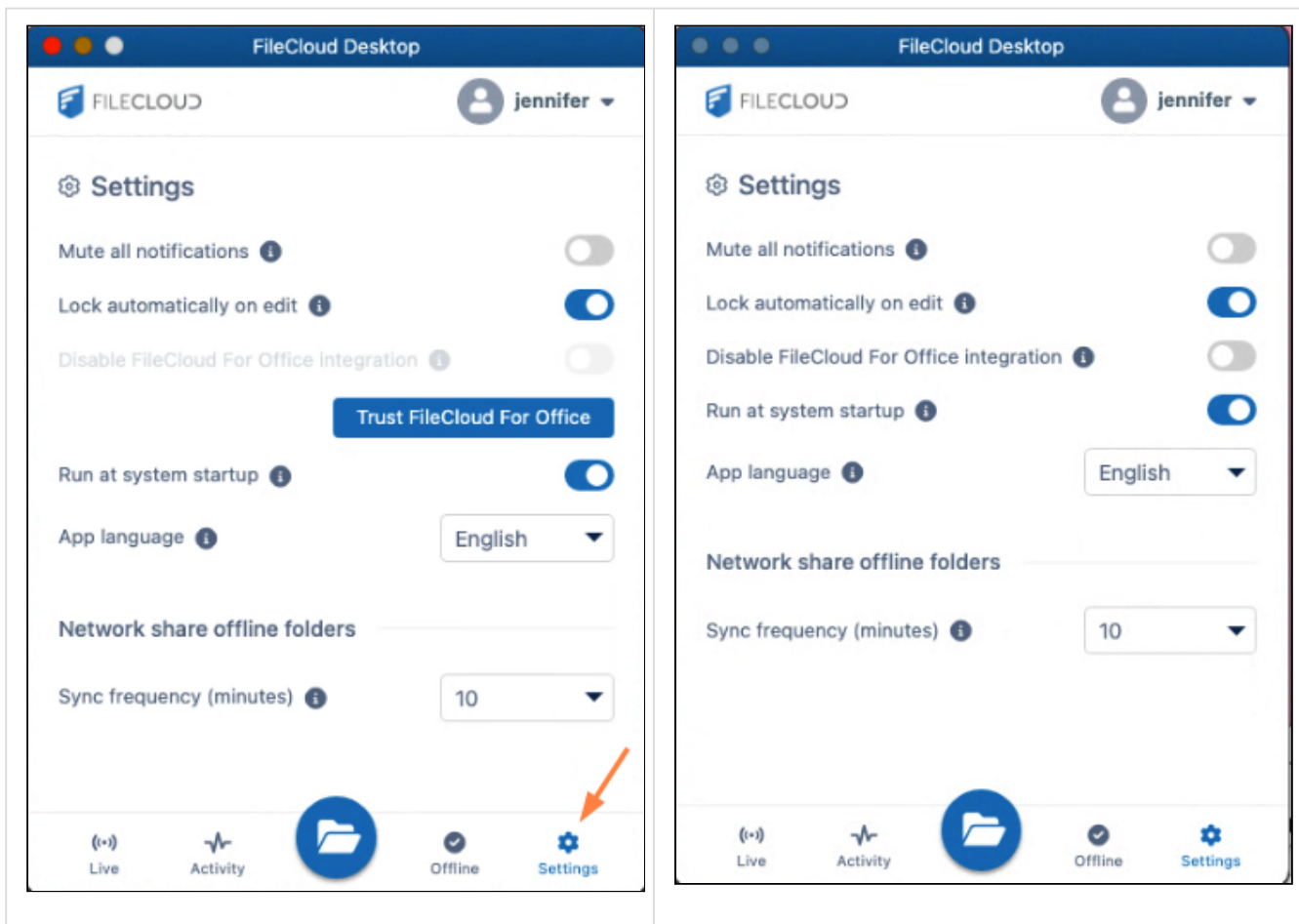
- Click **FileCloud Desktop help** to access this end user help.
- Click **Get logs** to open Mac finder to the Logs folder, where you can access your FileCloud Desktop for macOS log files.
- To log out of FileCloud Desktop for macOS, click **Log out**.  
You are warned that:



This means that in addition to logging you out FileCloud Desktop clears and removes the FileCloud folder that appears in the Finder.

## FileCloud Desktop Settings

To change your settings in FileCloud Desktop, click the **Settings** tab at the bottom of the dashboard.



Setting	Description
Mute all notifications	When enabled, all notifications sent from FileCloud Desktop are turned off. Default is <b>disabled</b> .
Lock automatically on edit	When enabled, files opened for edit through FileCloud Desktop are locked, and other users cannot edit them. When the files are closed they are unlocked again. Default is <b>enabled</b> .
Trust FileCloud for Office/ Disable FileCloud for Office integration	<a href="#">FileCloud for Office</a> is an add-in that allows users to automatically: <ul style="list-style-type: none"> <li>• Lock Office files when they open them</li> <li>• Share Office files while working with them in FileCloud clients</li> </ul> When you initially install FileCloud Desktop, the <b>Trust FileCloud for Office</b> button appears. Click it to use <a href="#">FileCloud for Office</a> . After you click the button, it disappears, and the <b>Disable FileCloud for Office</b> integration setting becomes visible, but is turned off, which means FileCloud for Office is enabled. When <b>Disable FileCloud for Office</b> is turned on, FileCloud Desktop does not integrate with FileCloud for Office. Default is <b>turned off</b> (FileCloud for Office is available and appears in FileCloud Desktop).
Run at system startup	When enabled, begin running FileCloud Desktop when the system starts. Default is <b>enabled</b> .
App language	User interface language. Change to any of the language options. Default is <b>English</b> .
Sync frequency (minutes)	Interval between automatic sync events for Network Folders. Choose any interval in the drop-down list. Default is <b>10</b> minutes.

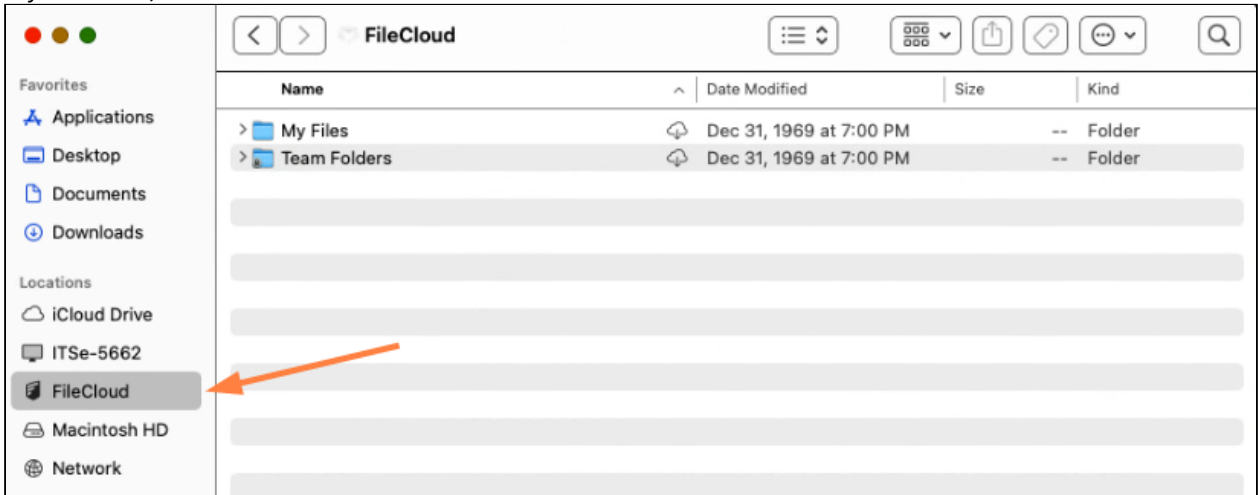
## Make Files and Folders Available Offline

To use FileCloud Desktop for macOS to synchronize offline and online changes you make to FileCloud files and folders, first download the folders with contents that you want to synchronize.

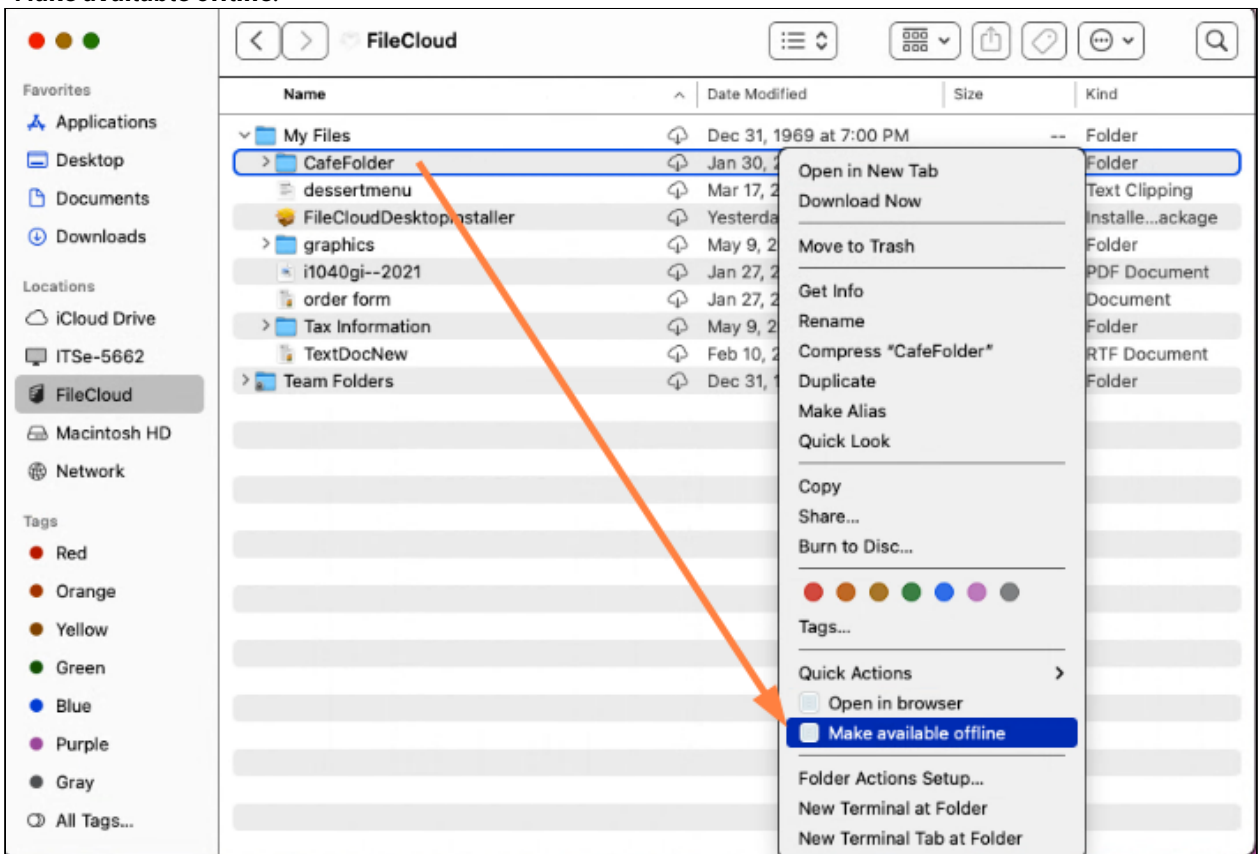
When you log in to FileCloud Desktop, your FileCloud folders become available in your finder in a **FileCloud** folder:

**To mark files and folders Available Offline:**

1. In your finder, locate the FileCloud folder.



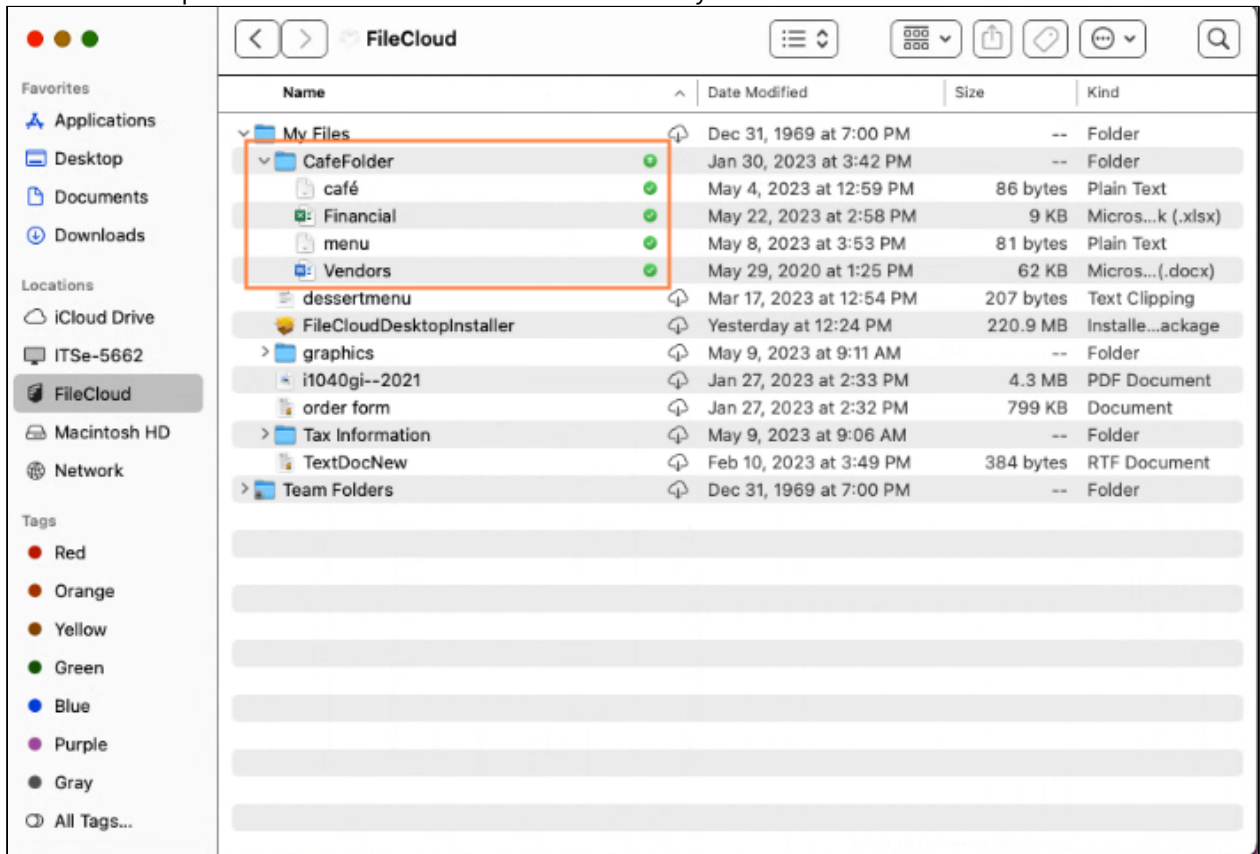
2. Right-click on each folder with contents that you want to be able to synchronize, and choose **Quick Actions > Make available offline**.



FileCloud downloads the folders and their contents to your local drive (and moves them into its offline folder), and replaces the cloud icon with a green icon to indicate that they are available for synchronization with FileCloud Desktop.

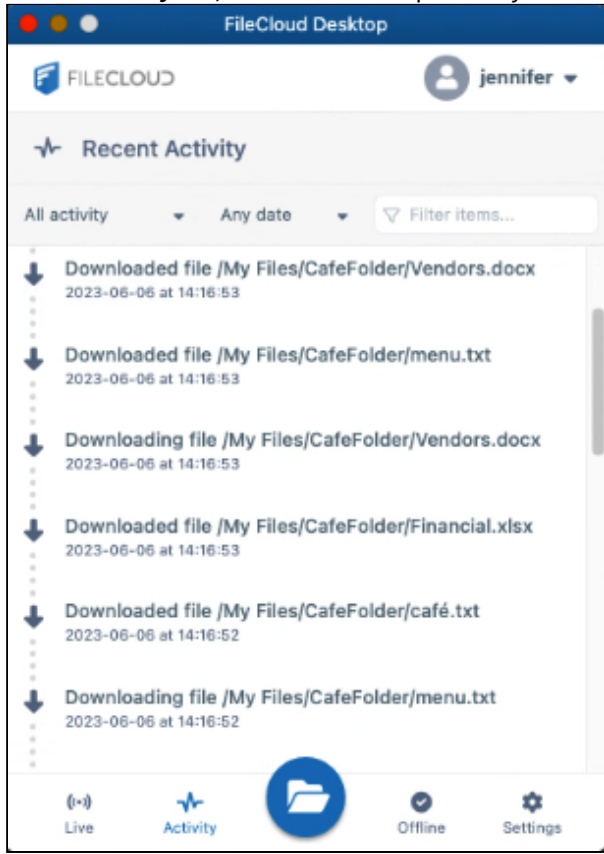
**Note:** If you click **Download Now** next to a file or folder you can edit it offline, but it is not in a FileCloud offline folder, and its changes aren't synced with FileCloud. Files downloaded with **Download Now** do not display an

icon (neither the cloud icon nor the green icon) next to them. You are still able to choose **Make available offline** for the folder to put it into an FileCloud offline folder that will sync with FileCloud.

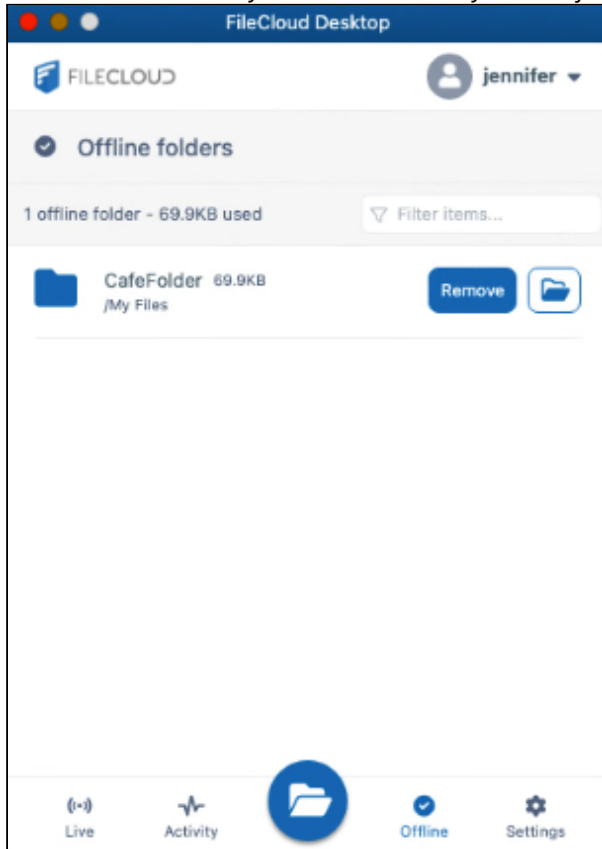


FileCloud Desktop's dashboard shows you the progress of the files being downloaded on the **Live** tab. These disappear as soon as download is complete.

On the **Activity** tab, FileCloud Desktop shows you the download actions for the same files.



The Offline tab shows you the folders that you have just made offline:



## Remove Files from Offline Folders

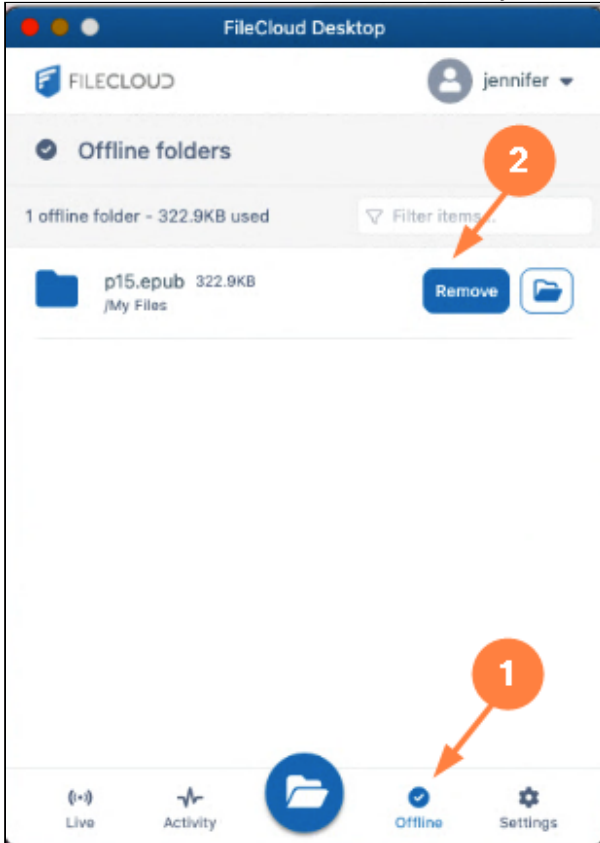
You can remove a file's ability to be edited offline by removing it from the offline folder, either through the FileCloud Desktop dashboard or through your Mac's Finder.

### To remove a file from the offline folder through the FileCloud Desktop dashboard:

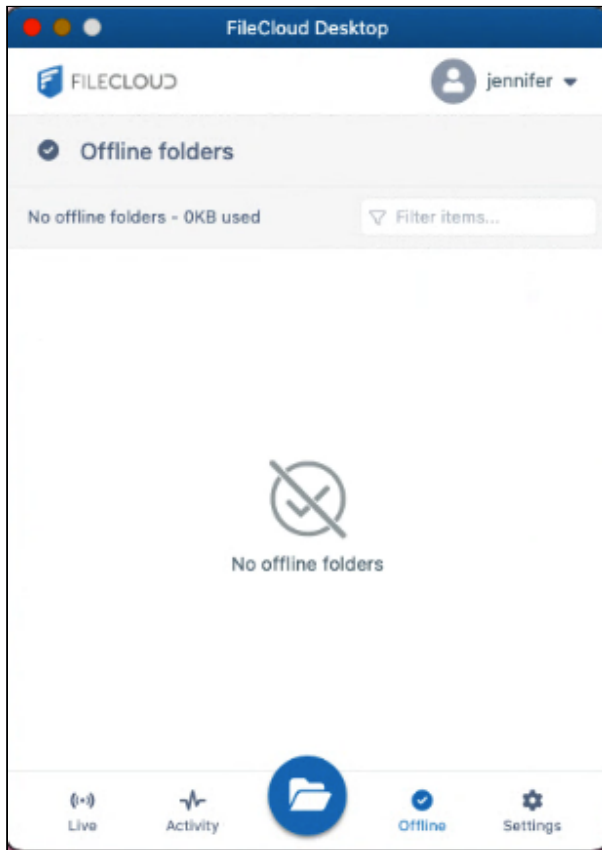
1. In the FileCloud Desktop dashboard, click the **Offline** tab.



2. Click the **Remove** button next to the file that you want to remove from the Offline folder.



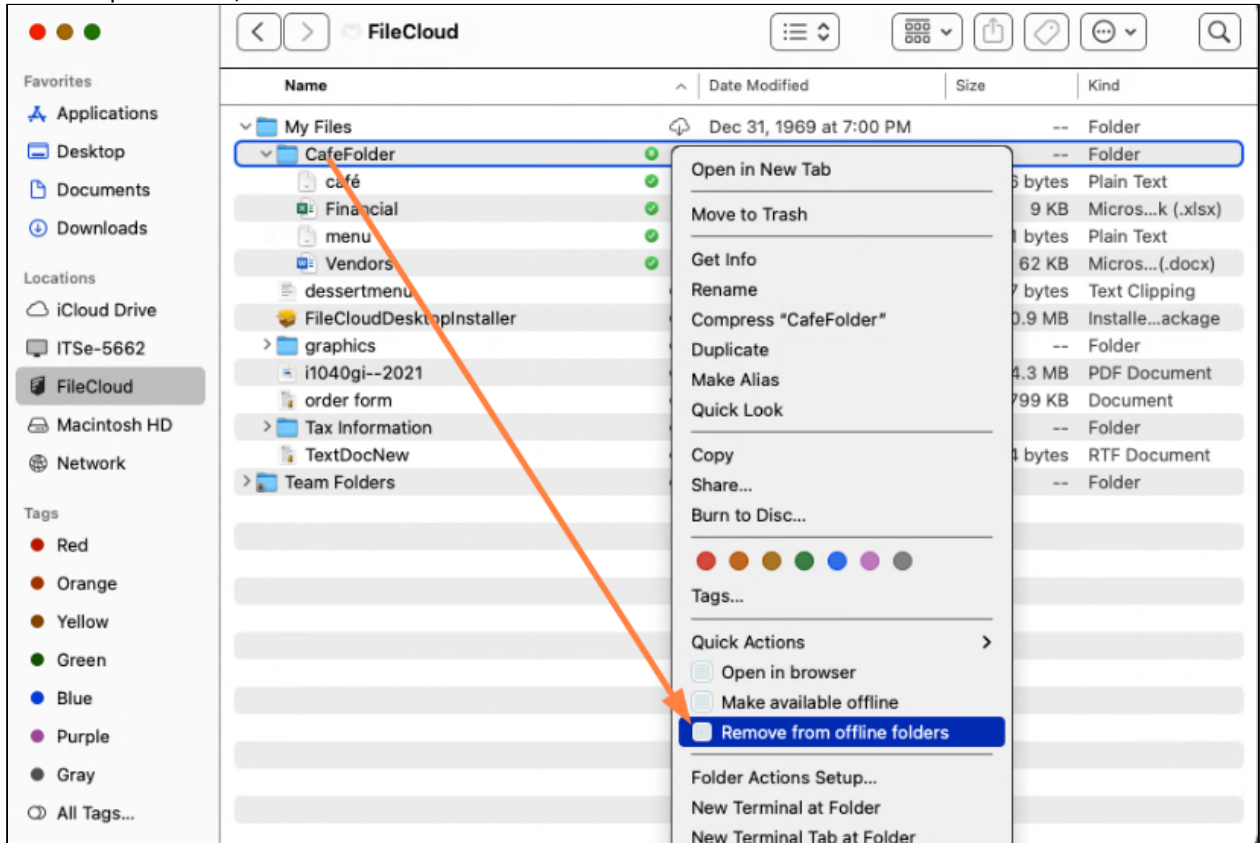
The file is no longer available offline. It no longer appears on the Offline tab of the FileCloud Desktop dashboard and the offline icon no longer appears next to it in the Finder.



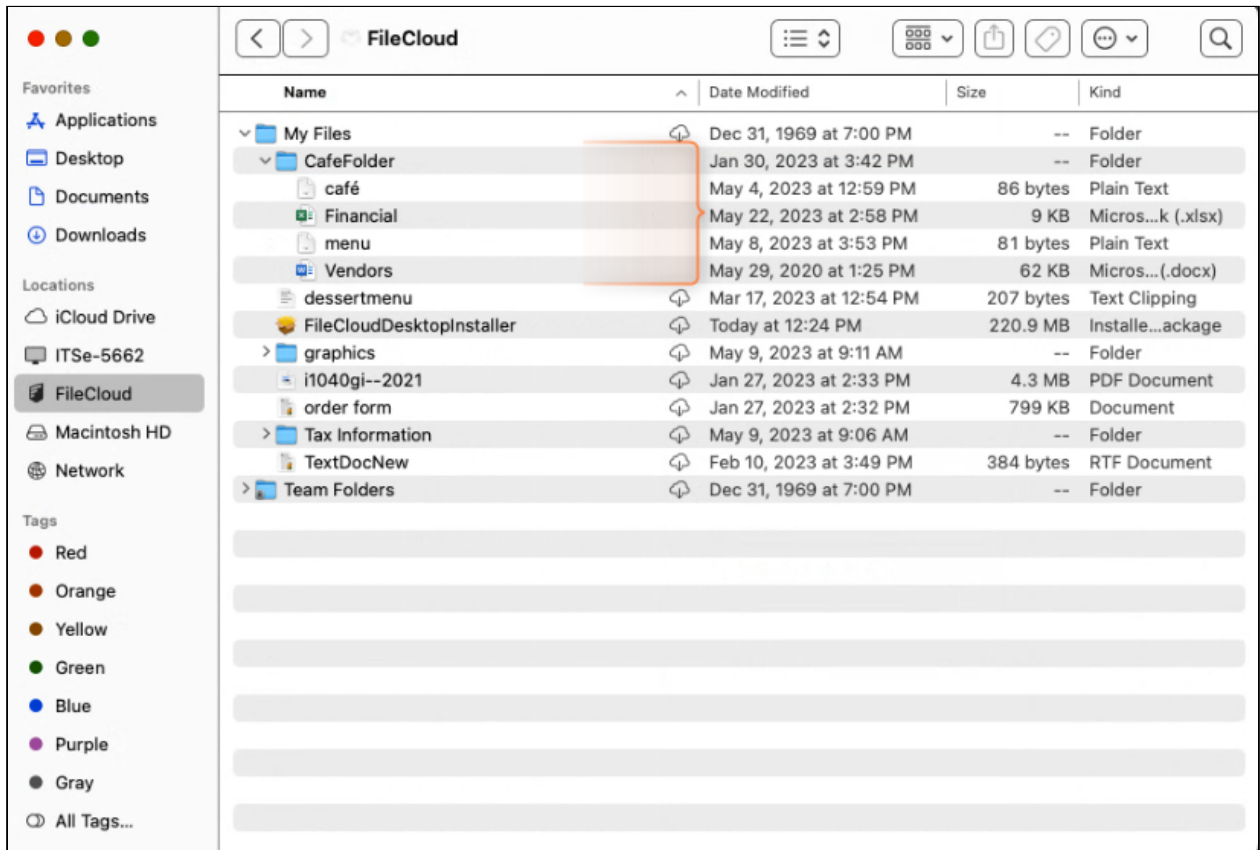
**To remove a file from the offline folder through the Finder:**

1. In the Finder, right-click on the file (it should have a green icon next to it).

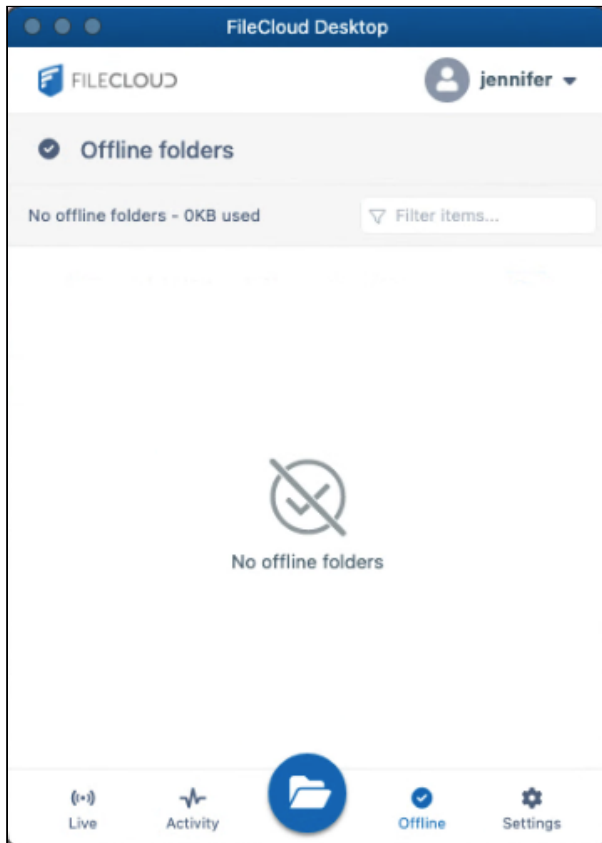
2. In the drop-down list, click **Remove from offline folders**.



The green icons no longer appear next to the folder or its contents.



The file is no longer listed on the **Offline** tab of the FileCloud Desktop dashboard.

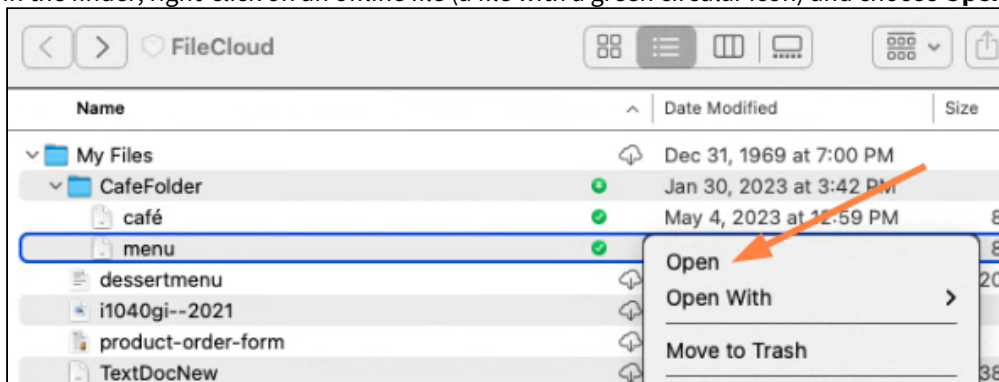


## Working with Offline Files from FileCloud Desktop for macOS

After you [make files and folders available offline](#), you can perform any of the regular Mac finder actions on them, and the changes are synchronized with the copies in FileCloud.

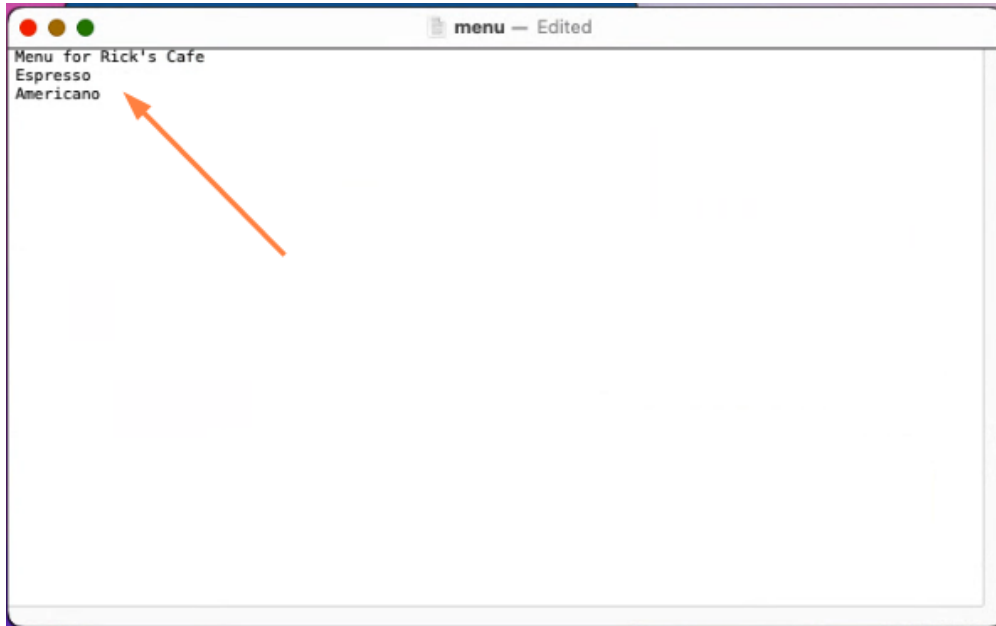
For example, in the following procedure, a downloaded file is edited from the finder. The Activities tab of FileCloud Desktop immediately lists the action as a modification of the file, but when it synchronizes with the copy in FileCloud, the Live tab of FileCloud desktop shows an upload because to sync, the file is uploaded to FileCloud (and overwrites the existing file).

1. In the finder, right-click on an offline file (a file with a green circular icon) and choose **Open** or **Open with**.

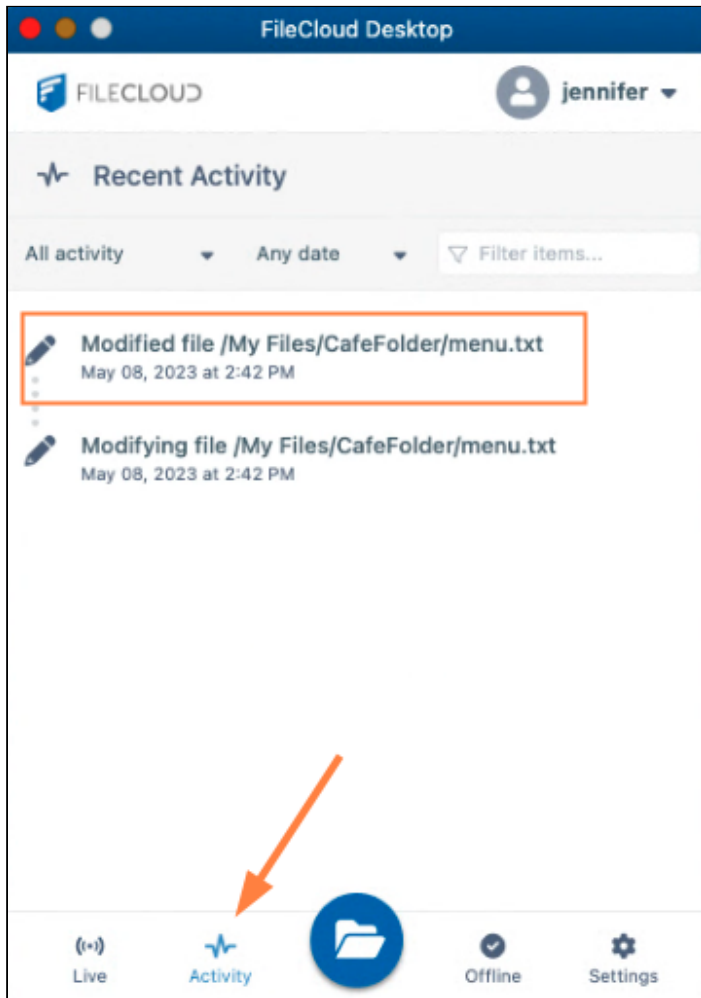


The file opens in the default or selected application.

2. Make edits to the file.

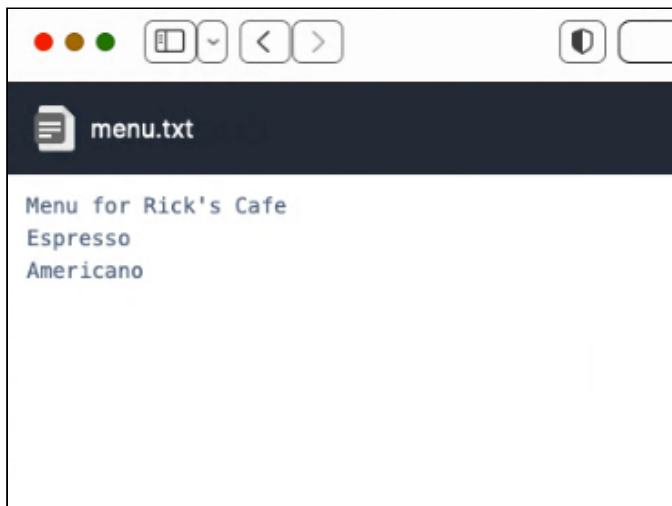
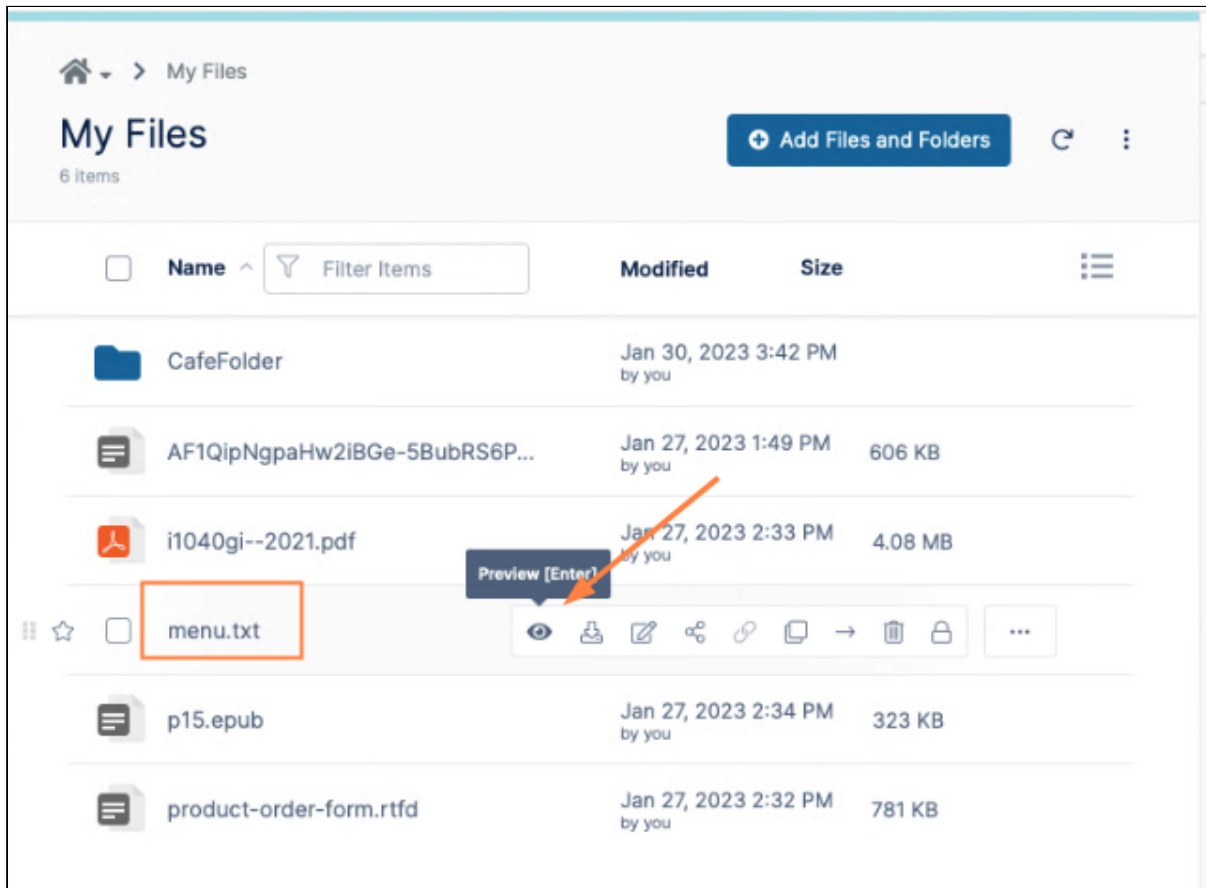


3. Save your edits, and close the file.
4. Click the **Activities** tab in FileCloud Desktop.  
The latest activity listing indicates that the file has been modified.



In addition, the modified file is synced with FileCloud (uploaded to FileCloud) and replaces the original file in FileCloud, so that the edited file is now the same offline and online.

5. If you want to confirm that the file has been synchronized, open or preview the file in FileCloud and check its contents.



## Working with Online Files in FileCloud Desktop for macOS

In the FileCloud Desktop folder in your Finder, any file or folder with a cloud next to it is online in FileCloud; when you edit or otherwise modify the file or folder from the Finder, you are actually modifying it in FileCloud, and the changes appear immediately in the files in the FileCloud user portal and other clients.



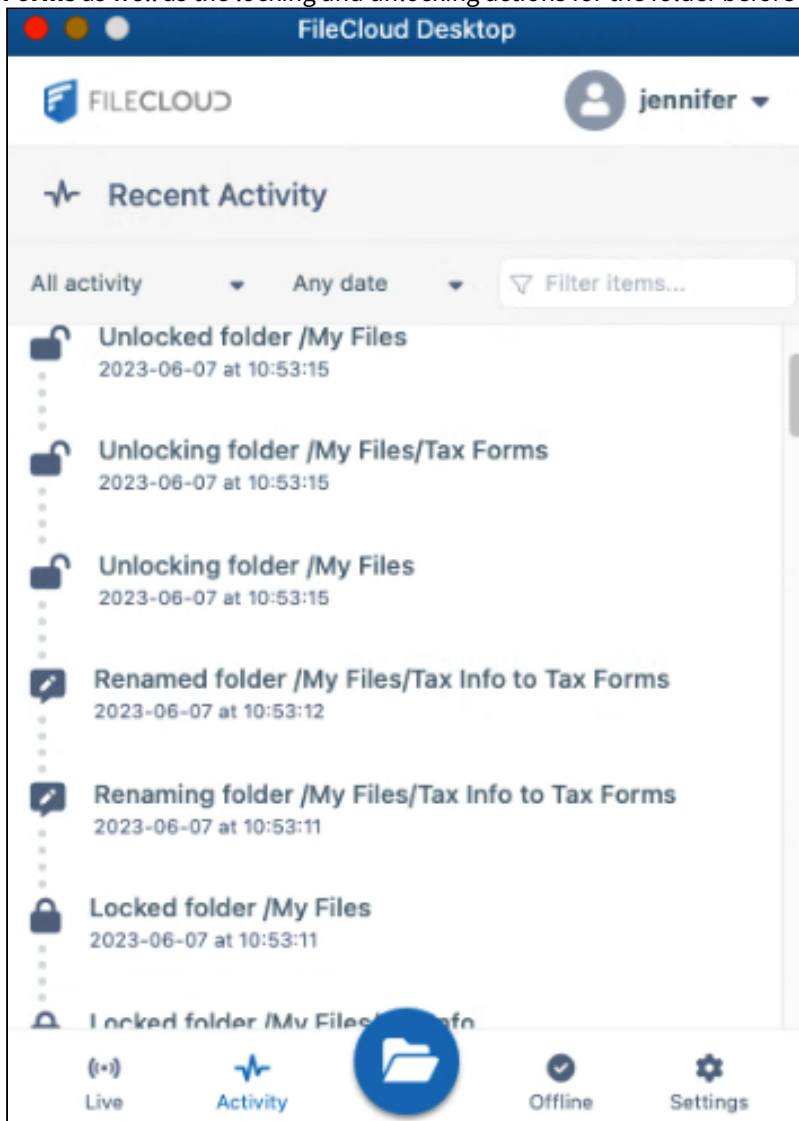
You can see this in the following video, which shows the online FileCloud files in the Finder and in the FileCloud user portal side by side. The file is renamed from **Tax Info** to **Tax Forms** in the Finder, and as soon as the user portal is refreshed, the change appears there as well. No sync action is needed.



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

*Movie URL not available.*

In the **Activity** tab of the FileCloud Desktop dashboard, you can see actions for renaming the folder **Tax Info** to **Tax Forms** as well as the locking and unlocking actions for the folder before and after it is modified:



The same is true if you edit, delete, create, or copy a file in either interface. It appears almost immediately on the other. (You can check the **Activity** tab to monitor when syncing has occurred.)  
The following example shows how a file created in the FileCloud user portal automatically appears in the online folder in the finder:



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

*Movie URL not available.*

## How FileCloud Desktop for macOS handles change conflicts

File conflict occurs when FileCloud Desktop for macOS cannot determine which copy of a file is the most recent. It can arise under the following conditions:

- When two users save the same file at approximately the same time.
- When one user is editing a file offline, and the file is modified by another user in FileCloud. When the person who was offline comes back online and FileCloud Desktop tries to upload the edited version to the server, it detects that there is a new version available.

In these cases, FileCloud Desktop for macOS automatically resolves the conflict by saving the copy of the file on the server, and overwriting the local copy with it.

## Mass Deployment Configuration for FileCloud Desktop for macOS

You can configure mass deployment settings for FileCloud Desktop for macOS through Remote client management (RMC).

### To configure FileCloud Desktop for macOS for mass deployment through RMC

You can configure client device settings for FileCloud Desktop for macOS remotely by specifying the configuration XML in the **Device Configuration** tab of [FileCloud policies](#).



For most clients, if the user changes the configuration locally, then the remote settings configured by the Administrator will override those settings the next time the client refreshes its settings.


**Policy Settings - Global Default Policy**

**Note:** Some policy settings will not be applicable for Guest and External users.

General   2FA   User Policy   Client Application Policy   **Device Configuration**   Notifications


Manage Device Configuration

Client Configuration



Save   Reset All   Close

### To set a device configuration for a policy:

1. Open a browser and log in the **Admin Portal**.
2. From the left navigation pane, select **Settings**.
3. To open the list of policies, select the **Policies** tab.
4. Click the policy that you want to configure, and then click the edit icon ().
5. Click on the **Device Configuration** tab.
6. In **Client Configuration**, paste or type in the remote device configuration XML for FileCloud Desktop for macOS. Please note that it uses the xml format:

```
<setting>
  <key>runatstartup</key>
  <value>1</value>
  <default>1</default>
</setting>
```

<default> is an optional tag that indicates if the setting can be changed through the user interface.

A value of 1 indicates the setting is a default and can be changed by the user through the user interface.

A value of 0 (or omission of <default>) indicates that the setting is overridden and cannot be changed by the user through the user interface.

### Example:

The code below shows example settings:

```
<xml>
```

```

<fileclouddesktopmac>
  <setting>
    <key>lockonopen</key>
    <value>1</value>
  </setting>
  <setting>
    <key>runatstartup</key>
    <value>1</value>
    <default>1</default>
  </setting>
  <setting>
    <key>loglevel</key>
    <value>debug</value>
  </setting>
  <setting>
    <key>language</key>
    <value>en</value>
  </setting>
  <setting>
    <key>mutenotifications</key>
    <value>0</value>
  </setting>
</fileclouddesktopmac>
</xml>

```

In this example:

- Files are automatically locked when they are opened by FileCloud Desktop (lockonopen = 1). Default value.
- The application runs at startup (runatstartup = 1, default = 1). Default value.
- The log level is set to "debug" (loglevel = debug). Overridden value.
- The language is set to "en" (language = en). Default value.
- Notifications are not muted (mutenotifications = 0). Default value.

## Keys and values

Table 1. The following XML tags are supported for FileCloud Desktop for macOS device configuration.

Key	Description	Values
lockonopen	Automatically lock files when they are opened.	0 (disabled) 1 (enabled) default
runatstartup	Run FileCloud Desktop for macOS on system startup.	0 (disabled) 1 (enabled) default
loglevel	Level of details stored in log files, where <b>information</b> is the least detailed, and <b>trace</b> is the most detailed.	"information" default "debug" "trace"

Key	Description	Values																				
language	Language of the FileCloud Desktop for macOS user interface.	<table border="1"> <thead> <tr> <th>Value</th> <th>Language</th> </tr> </thead> <tbody> <tr> <td>nl</td> <td>Dutch</td> </tr> <tr> <td>en (default)</td> <td>English</td> </tr> <tr> <td>de</td> <td>German</td> </tr> <tr> <td>es</td> <td>Spanish</td> </tr> <tr> <td>pt</td> <td>Portuguese</td> </tr> <tr> <td>fr</td> <td>French</td> </tr> <tr> <td>ar</td> <td>Arabic</td> </tr> <tr> <td>it</td> <td>Italian</td> </tr> <tr> <td>ru</td> <td>Russian</td> </tr> </tbody> </table>	Value	Language	nl	Dutch	en (default)	English	de	German	es	Spanish	pt	Portuguese	fr	French	ar	Arabic	it	Italian	ru	Russian
Value	Language																					
nl	Dutch																					
en (default)	English																					
de	German																					
es	Spanish																					
pt	Portuguese																					
fr	French																					
ar	Arabic																					
it	Italian																					
ru	Russian																					
mutenotificati ons	Suppress all notifications on FileCloud Desktop.	0 (disabled, notifications are shown) default 1 (enabled, notifications are not shown)																				

If a key is not supported or a value is incorrect, the application skips it and logs a warning message.

## Using FileCloud for Office with FileCloud Desktop for macOS

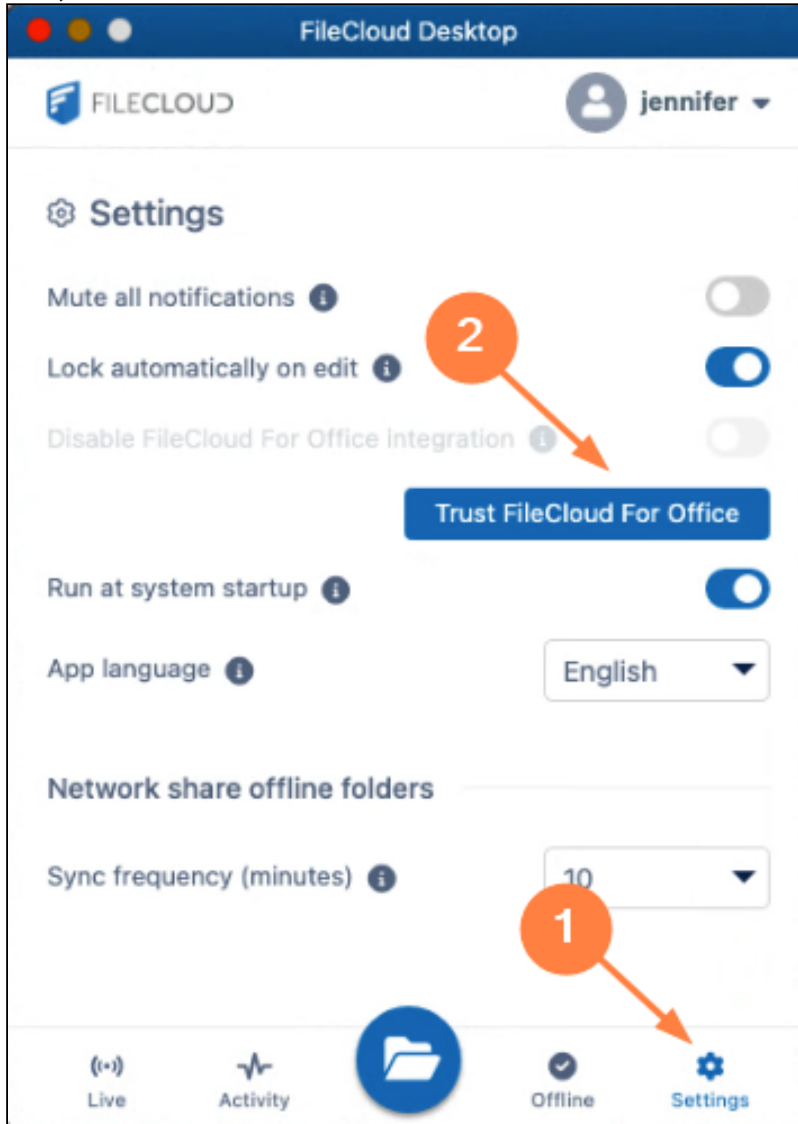
- i** FileCloud for Office is an MS Office add-in for Word, Excel, and PowerPoint which can be used in both Windows and macOS with FileCloud Sync, FileCloud Drive, and FileCloud Desktop. It is available in FileCloud beginning with version 23.1.  
For instructions on how to install FileCloud for Office, see [Using FileCloud for Office](#).

## Before using FileCloud for Office with FileCloud Desktop for macOS

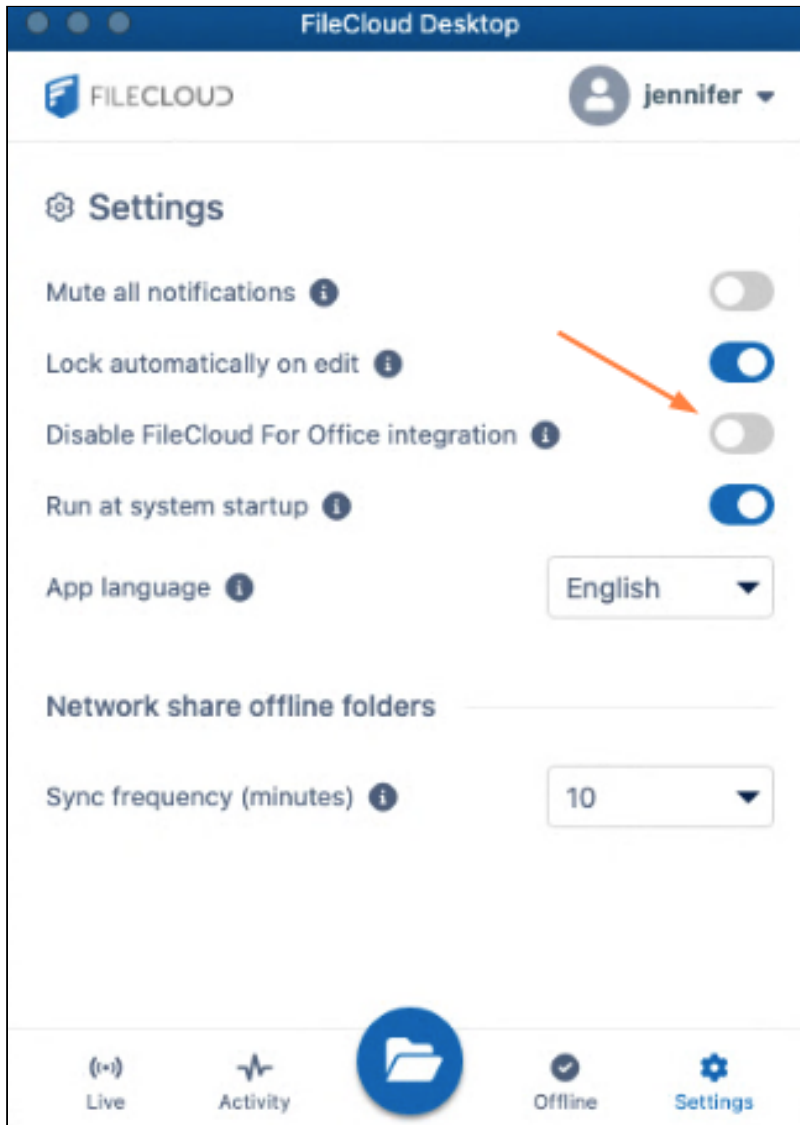
The first time you install FileCloud Desktop for macOS, confirm that you trust FileCloud for Office.

### To confirm that you trust FileCloud for Office:

1. After you log in to FileCloud Desktop for MacOS, click the **Settings** tab.
2. Then, click the **Trust FileCloud for Office** button.



The **Trust FileCloud for Office** button disappears, and the slider for **Disable FileCloud For Office integration** becomes accessible, and is turned off by default. Leave it turned off to be able to use FileCloud for Office.



FileCloud for Office is now enabled, but to use it in Office files, you must [attach the add-in](#) to each type of Office file from your FileCloud Desktop directory.

## Working with FileCloud for Office in FileCloud Desktop for macOS

The FileCloud for Office task panel displays information about a file and enables you to:

- Lock or unlock a file.
- Prevent or allow download of a file while locked.
- Share a file.
- Manage file versions, and view file details and metadata.

## Lock or unlock a file

### Locking and unlocking files

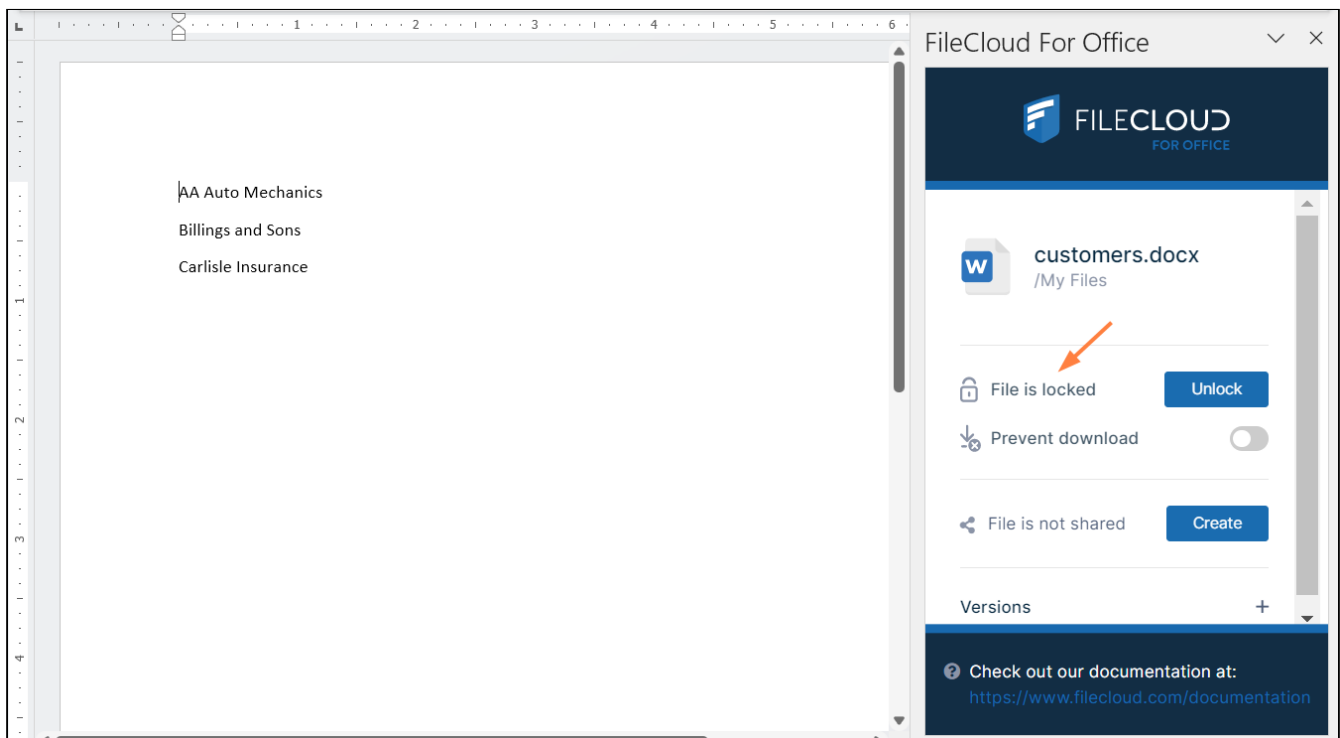
You can use the file locking function in FileCloud for Office to:

- See if you have a file locked for editing
- Turn a file lock on or off
- Prevent or enable downloads of a locked file

If a shared file is not locked when you open it for edit, another user can also open the file and make changes.

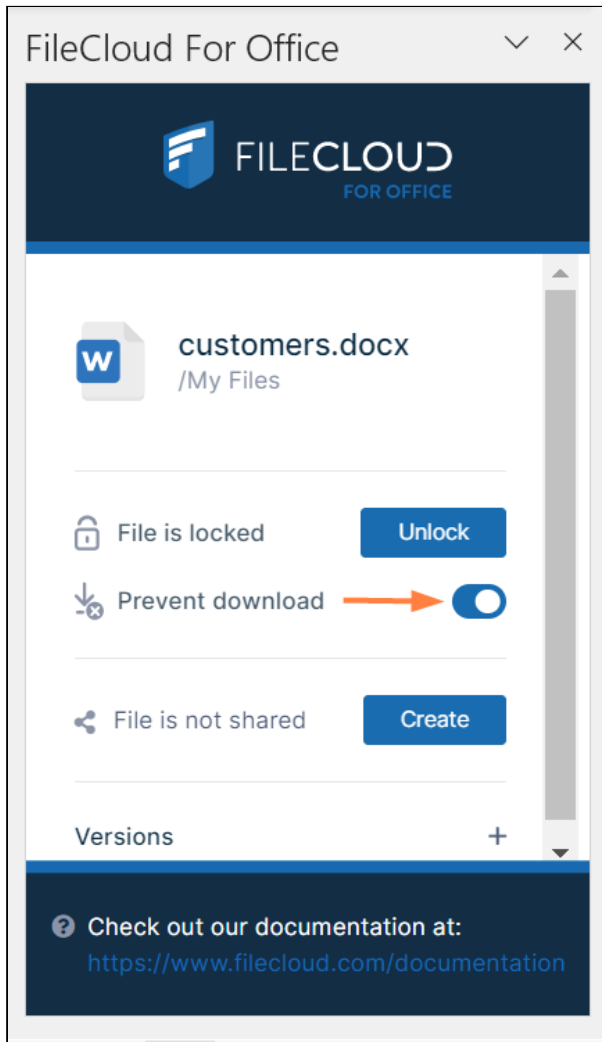
To avoid this, by default, FileCloud for Office automatically locks files for editing when they are opened.

When you open an Office file in your client directory, the FileCloud for Office panel shows **File is locked**, and by default, users are allowed to download or read the file (**Prevent download** is disabled).



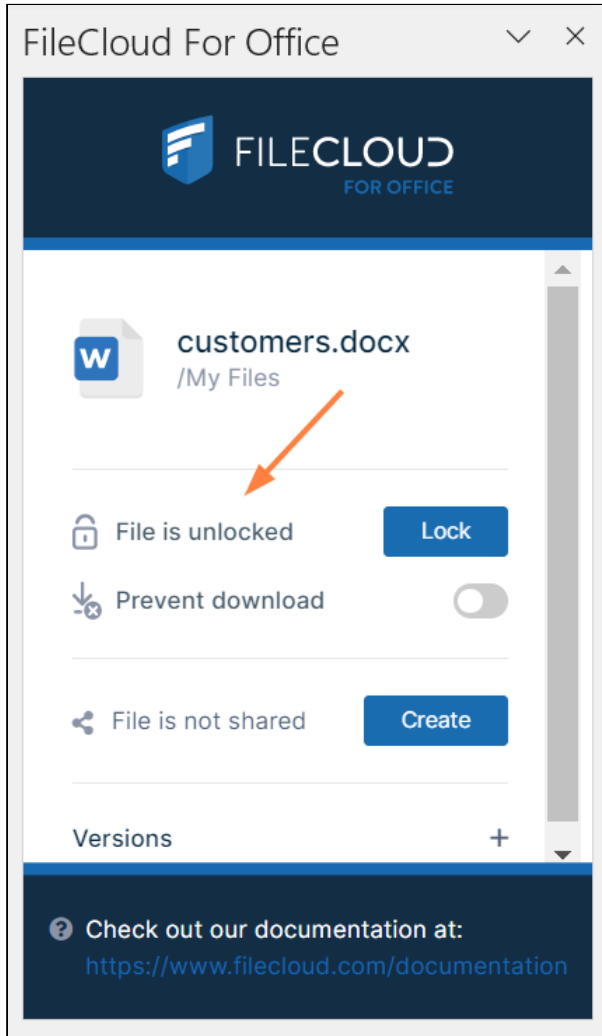


- To prevent other users from downloading or reading the file while it is locked, click the **Prevent download** slider.



- To unlock the file while you have it opened for edit, click **Unlock**. Now other users can modify as well as view and download the file.

**Note:** Prevent download cannot be enabled when the file is unlocked.



The following table describes what each lock status means and how it impacts what you and others you have shared the file with can do with the file.

Lock Status	Access by lock owner	Access by others
File is locked (download allowed)	Read and modification allowed	Only read is allowed, no modification is allowed
File is locked (download prevented)	Read and modification allowed	Neither read nor modification is allowed
File is not locked	Read and modification allowed	Read and modification allowed

**For a locked file with download (read) prevented:**

If USER1 has locked (and read blocked) the file:

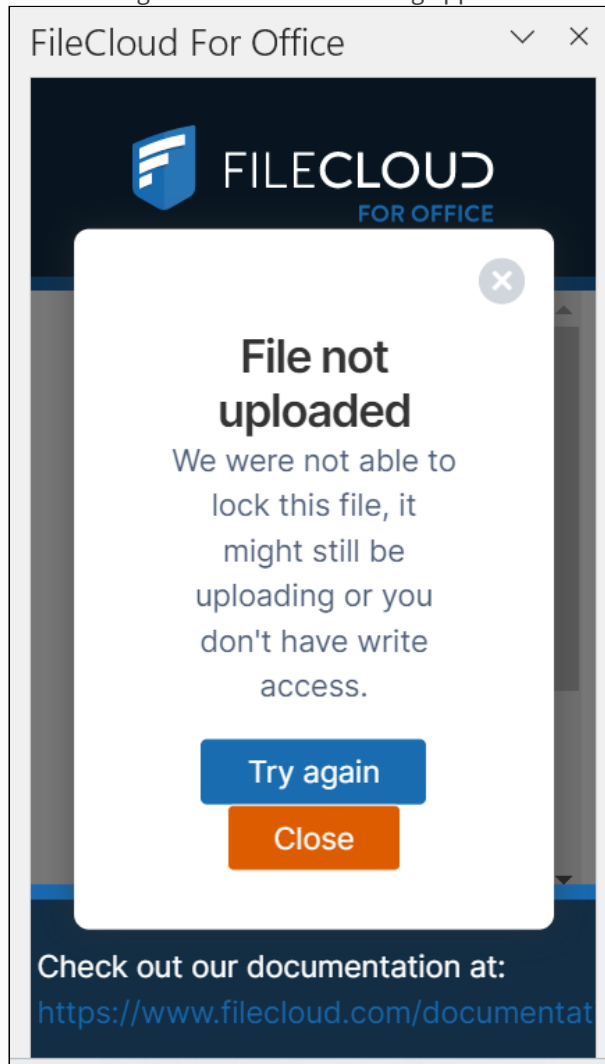
- The FileCloud client will not download the file for USER2

However, if USER2 has already downloaded the file in Sync or Drive, then:

- FileCloud Sync will allow FileCloud for Office to open the file.
- FileCloud Drive will not allow the file to be opened by USER2, unless Drive has already cached the file.

















**If an admin prevents file locking after a user has locked a file in a client:**

- The lock is automatically removed from the file
- Additional files cannot be locked using FileCloud for Office, and when you attempt to lock a file, an error message similar to the following appears:



If you are an admin and want to disable locking, see [Managing User Locks](#).

You can use the following table to understand the status of lock:

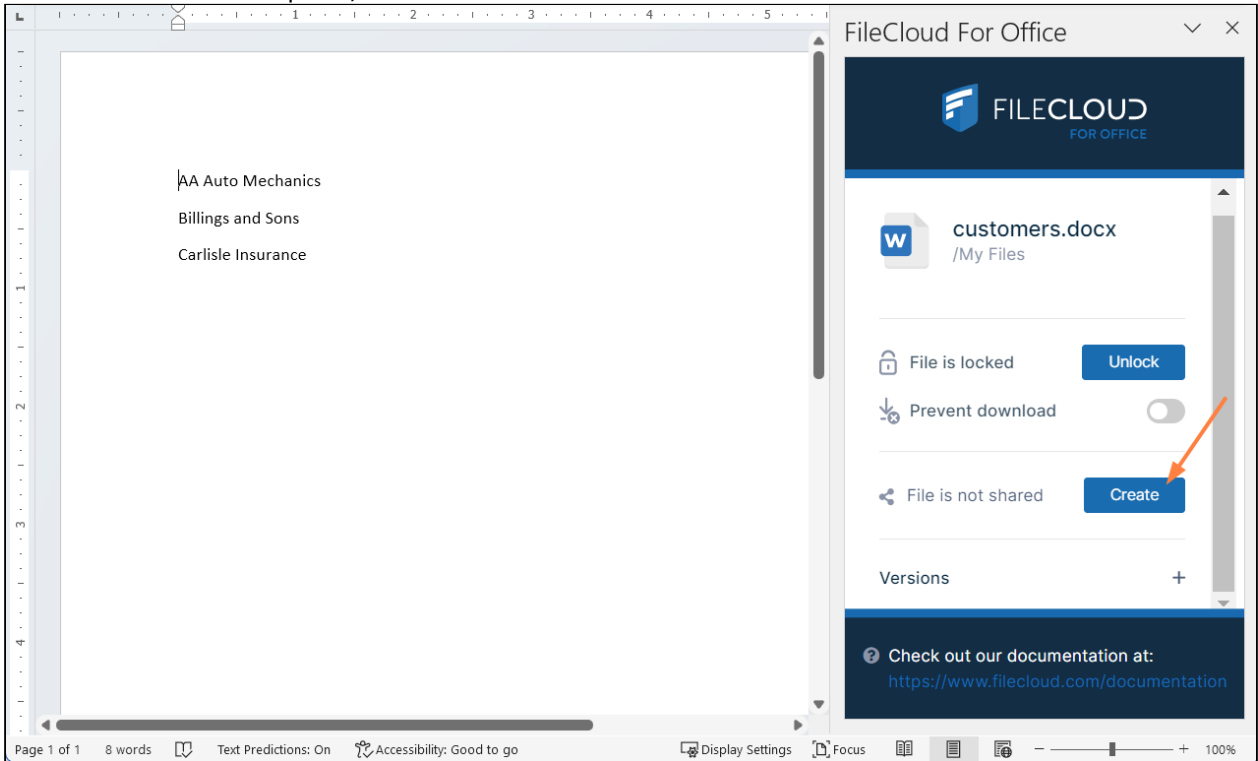
Action	Doc IQ Lock Enabled	Prevent Download	Lock Status Before Open	Lock Status After Open	Lock Status After close
An unlocked file is opened by USER1			File is not locked	File is locked (read allowed) by USER1	File is not locked
An unlocked file is opened by USER1			File is not locked	File is not locked	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (Read Allowed) by USER1	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (Read Allowed) by USER1	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1	File is not locked
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1	File is Locked (Read Allowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1	File is Locked (Read Blocked) by USER1

## Share a file

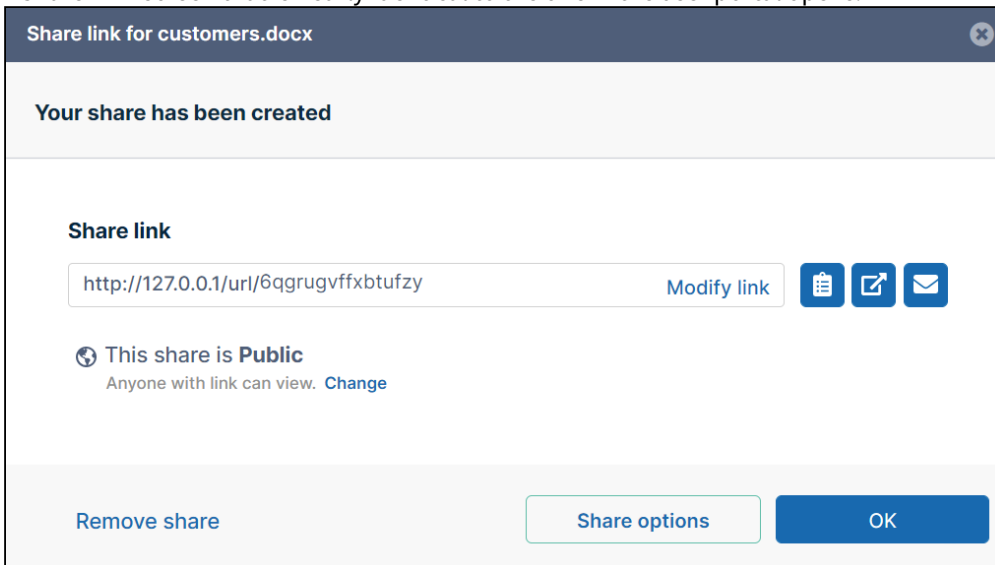
### Sharing a file

**To share a file or folder that is opened with FileCloud for Office:**

1. In the FileCloud for Office panel, click **Create**.



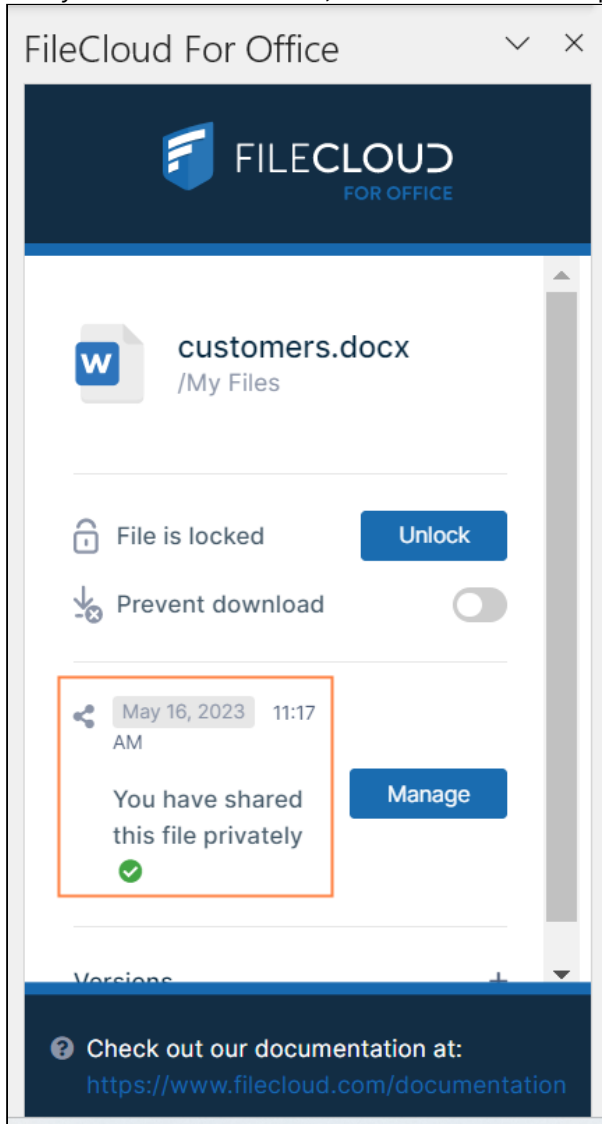
A Share Link screen that is nearly identical to the one in the user portal opens:



2. Share the file using the same settings and options that you would for a share in the user portal. See [Sharing Files and Folders](#) for help.

**Note:** The option for downloading the share QR code, which is available for shares created from the user portal, is not available for shares created in FileCloud for Office.

After you have shared the file, the FileCloud for Office panel displays details of the share:



3. Click **Manage** to change the options or permissions in the share.

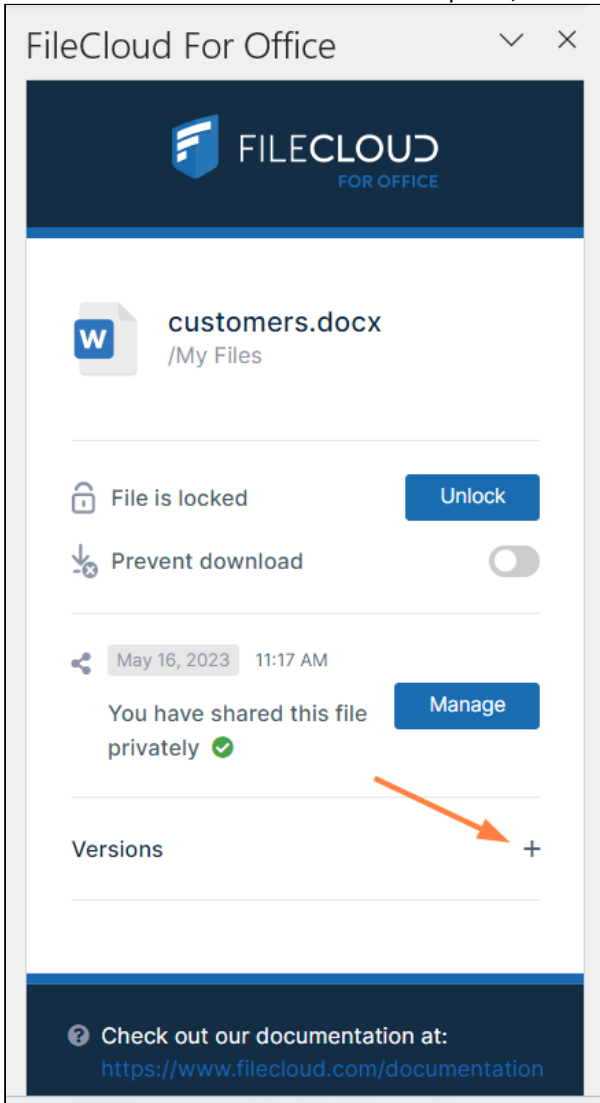
Download versions, view details and metadata

**Downloading versions, viewing details, viewing metadata**

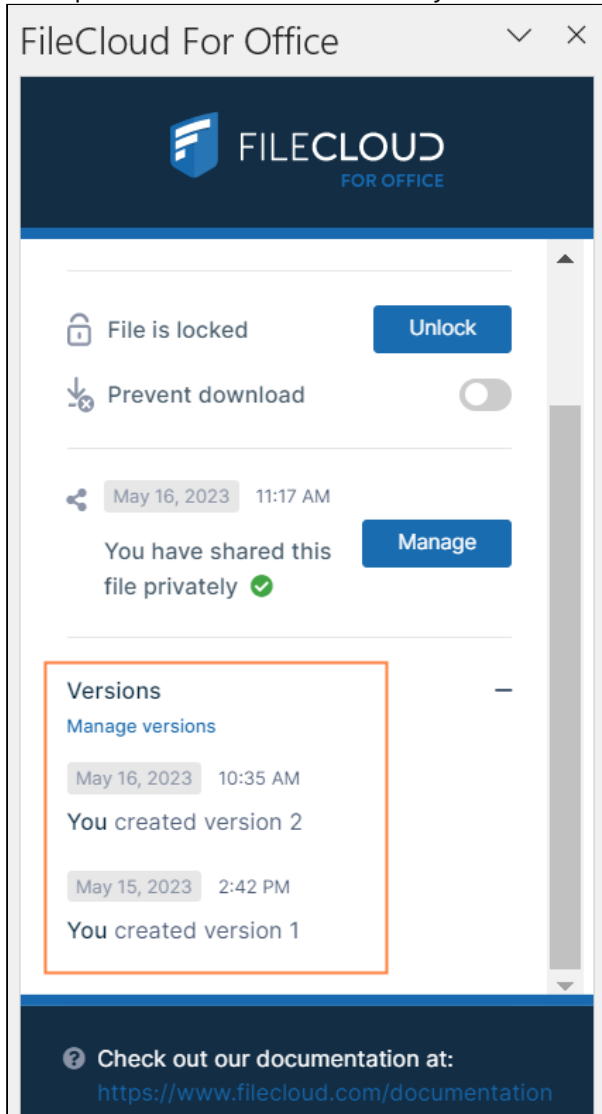
Versions

**To view a file's version information in FileCloud for Office:**

1. At the bottom of the FileCloud for Office panel, click the + across from **Versions**.



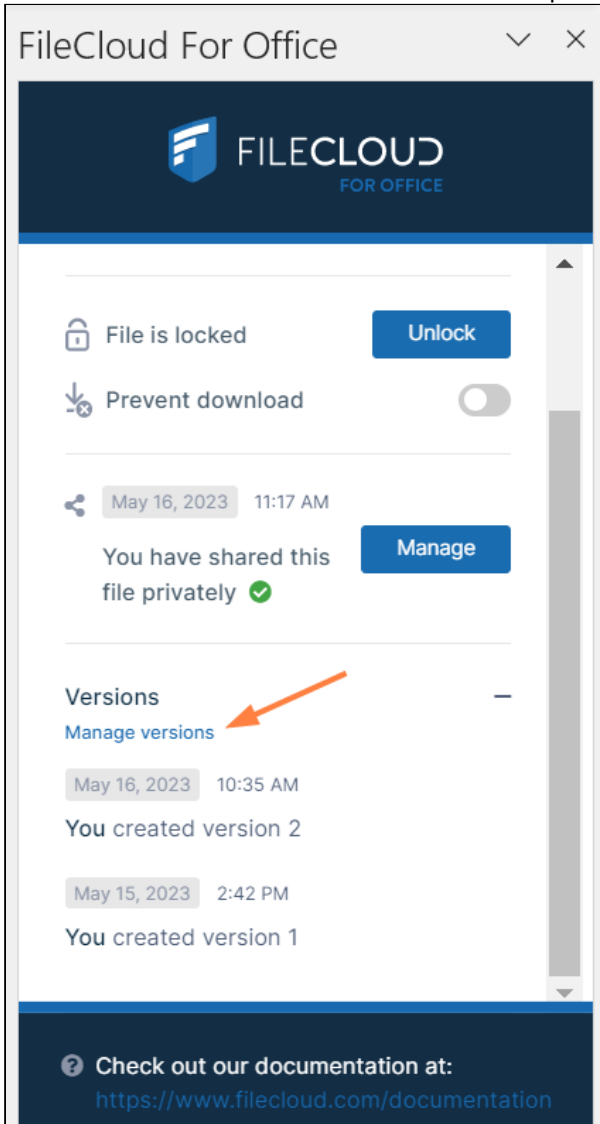
The expanded **Versions** section shows you version information about the file.



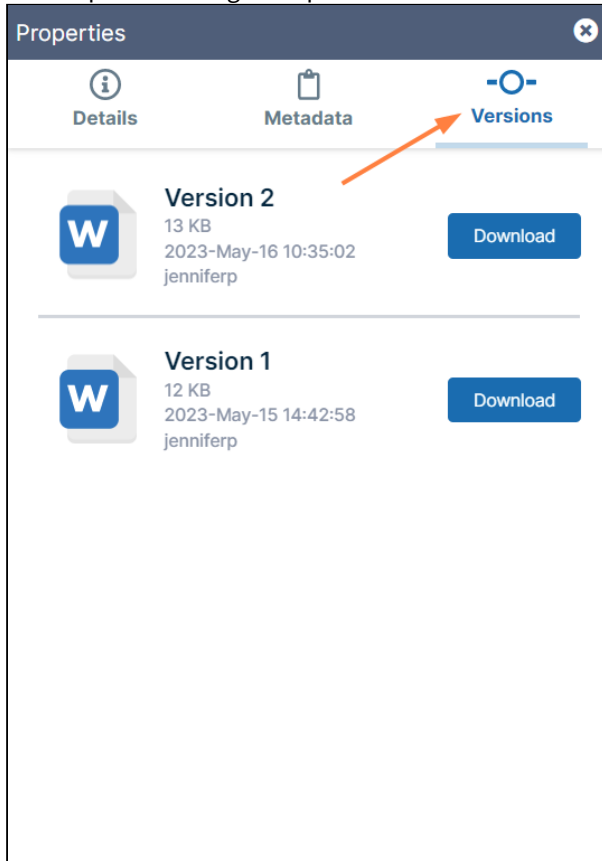
**To download file versions in FileCloud for Office:**



1. In the **Versions** section of the FileCloud for Office panel, click **Manage versions**.



The Properties dialog box opens to the **Versions** tab.

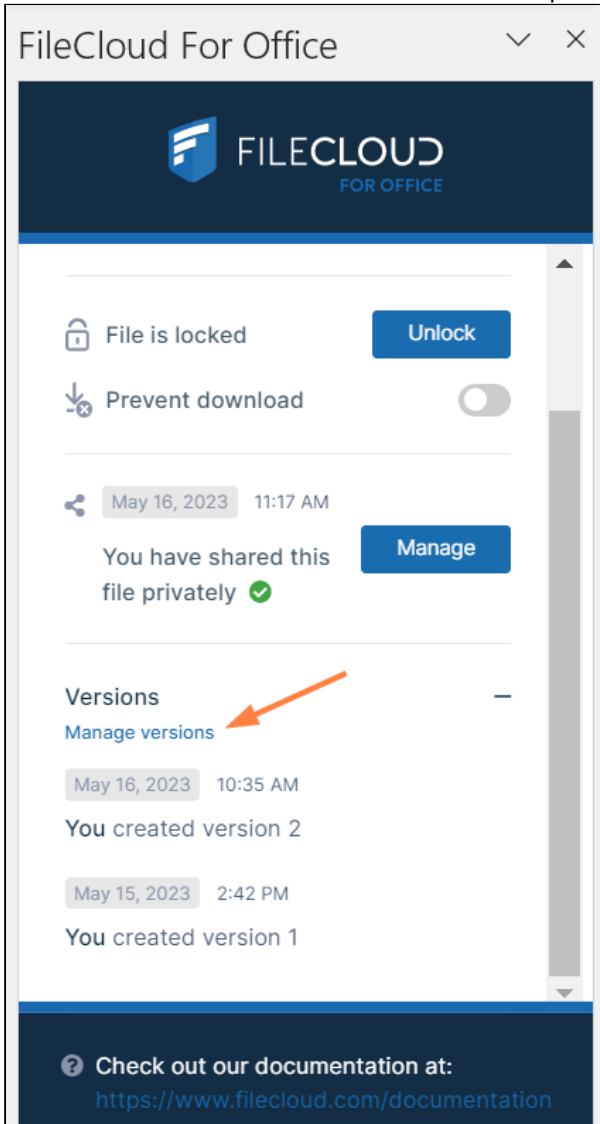


2. Click **Download** for the version that you want to download, and save it.

## Details

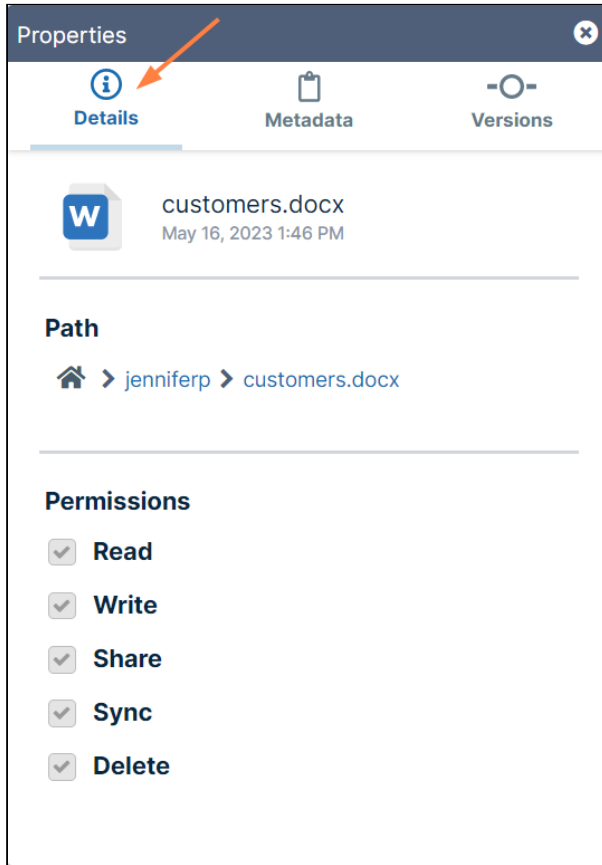
**To view file details:**

1. In the **Versions** section of the FileCloud for Office panel, click **Manage versions**.



The **Properties** dialog box opens to the **Versions** tab.

2. Click the **Details** tab.

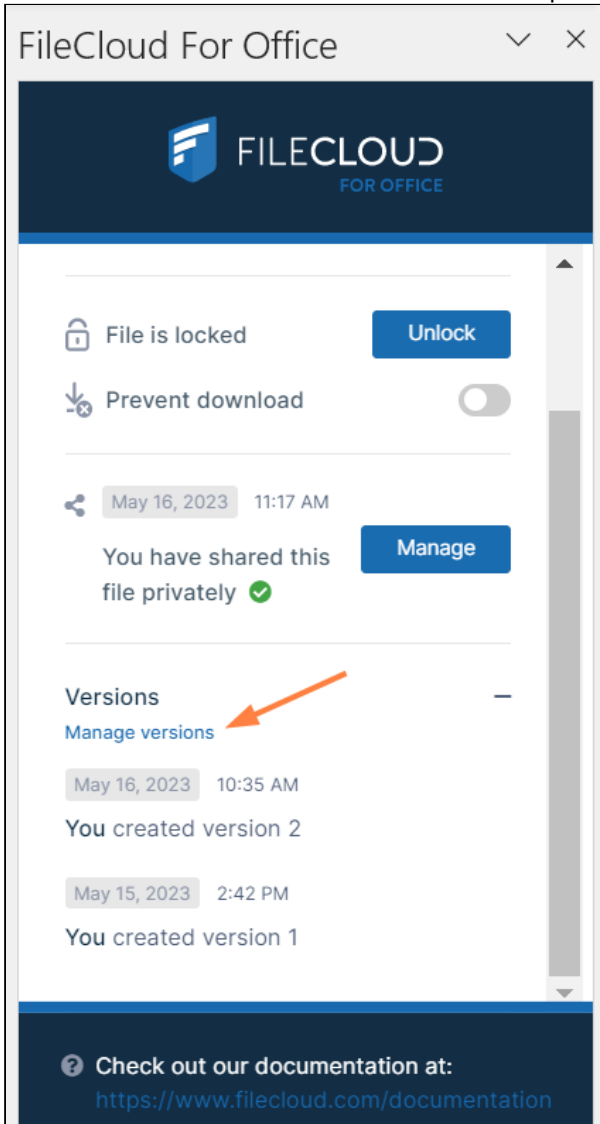


The details shown are the filename and type, the last modified date, the path of the file in FileCloud, and your permissions for the file.

## Metadata

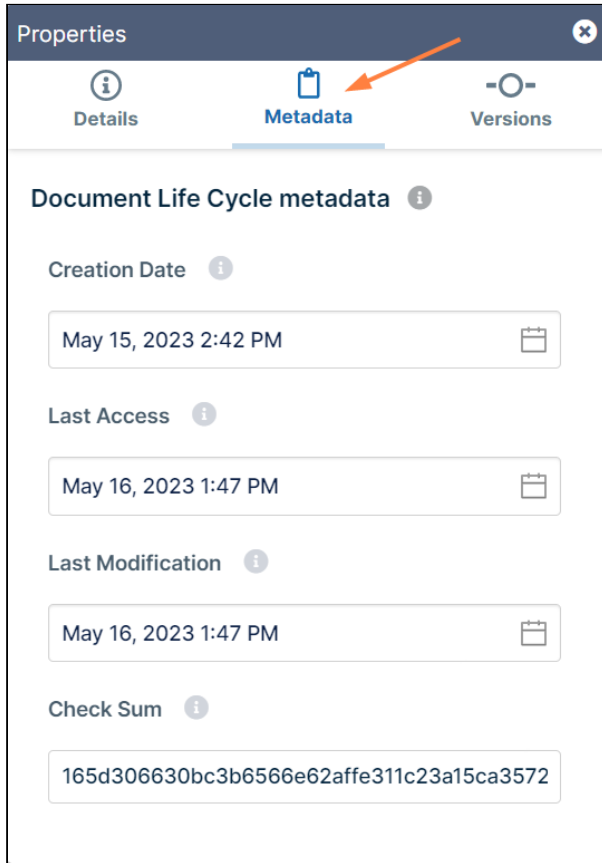
To view metadata information for the file:

1. In the **Versions** section of the FileCloud for Office panel, click **Manage versions**.



2. **The Properties** dialog box opens to the **Versions** tab.

3. Click the **Metadata** tab.



Each metadata set applied to the file is listed with the values for its fields.

FileCloud for Office log locations

### Locating FFO logs

The locations of log files for FileCloud for Office in Windows and macOS are the following:

**Windows:** %appdata%/FFOServer

**macOS:** /Users/[USERNAME]/Library/Preferences/FFOServer

View and add comments

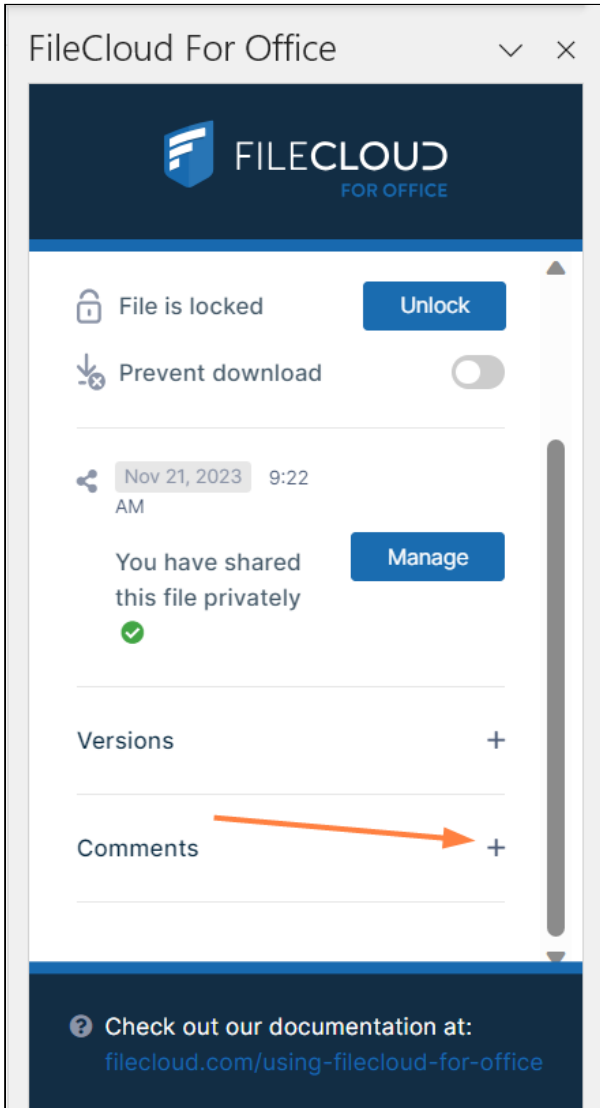
### Viewing and adding comments

Comments added to files and folders in FileCloud for Office also appear in the user portal and any of the other client apps.

### To view and add comments in FileCloud for Office:

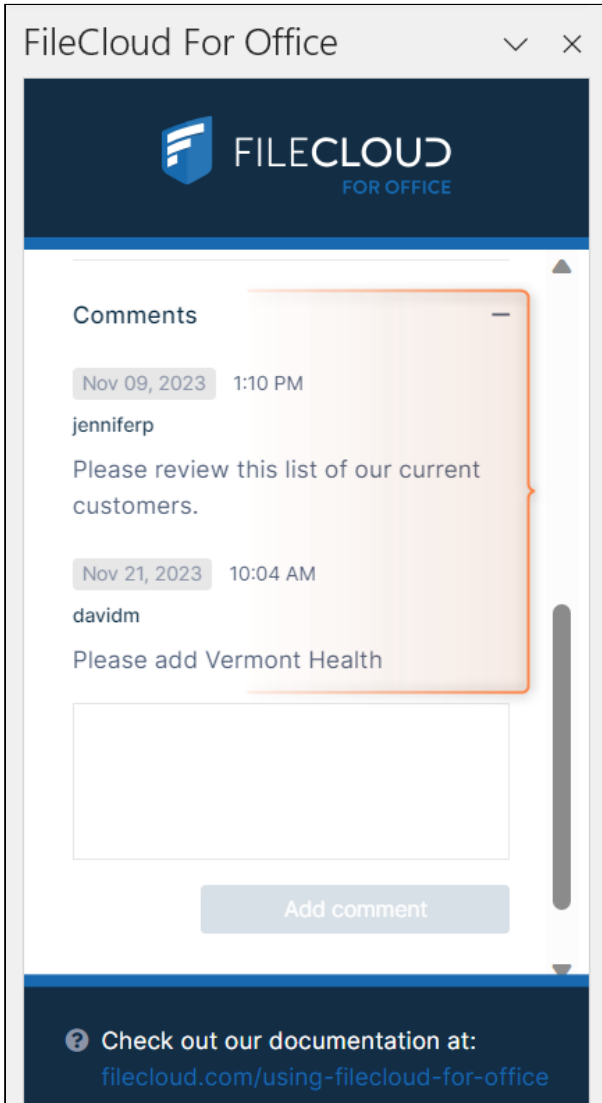
1. If **Comments** is not visible in the FileCloud for Office panel, scroll down to the bottom of the panel.

2. Click the + across from **Comments**.



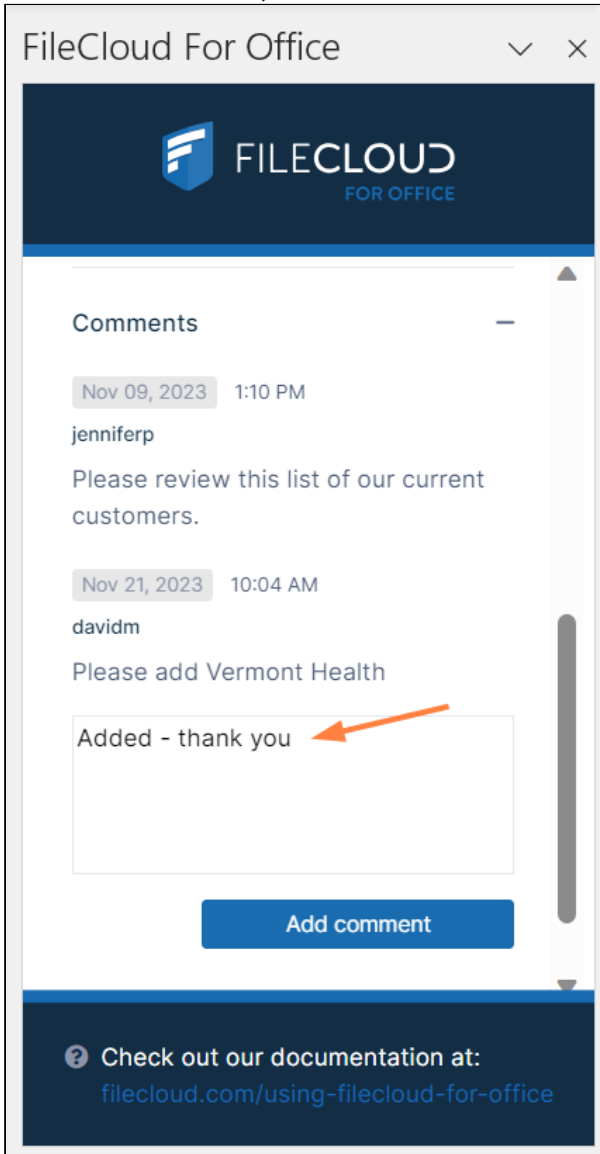
Any existing comments added to the file or folder here or anywhere else in FileCloud appear above

the **Comments** box.

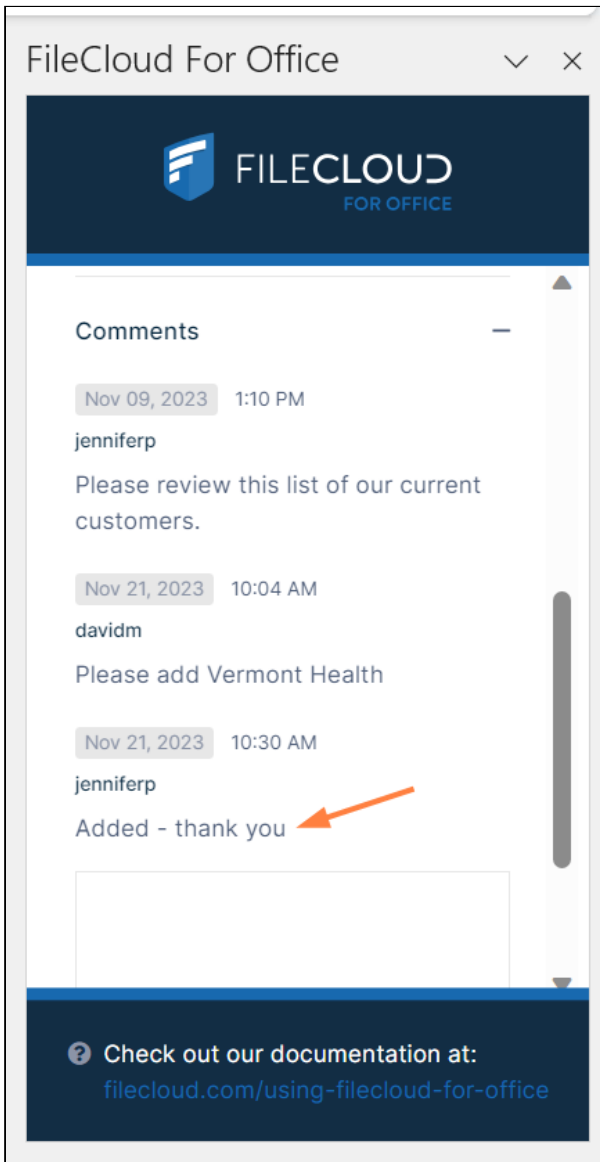




3. To add a new comment, click inside the **Comments** box and enter the comment.



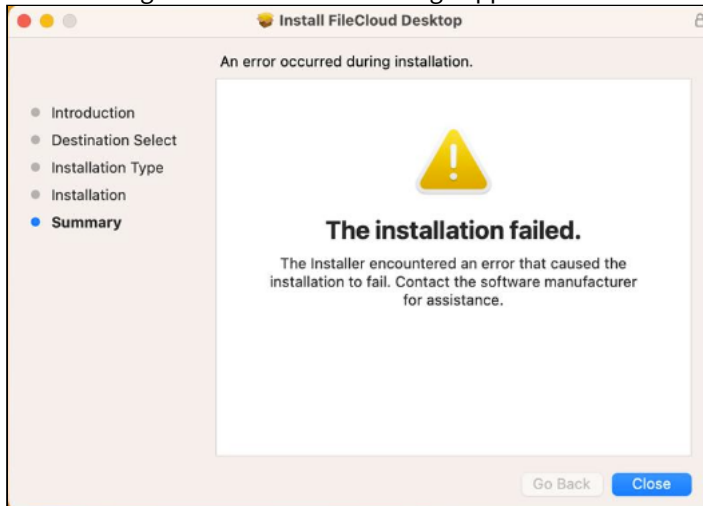
4. Click **Add comment**.  
The comment is added.



## Troubleshooting FileCloud Desktop for macOS

**Problem:**

The following installation failed message appears in the Summary at the end of installation:

**Solution:**

Check if the installer file (.pkg) is stored on Dropbox or OneDrive/iCloud Drive/... If it is, move the installer to another location and try reinstalling.

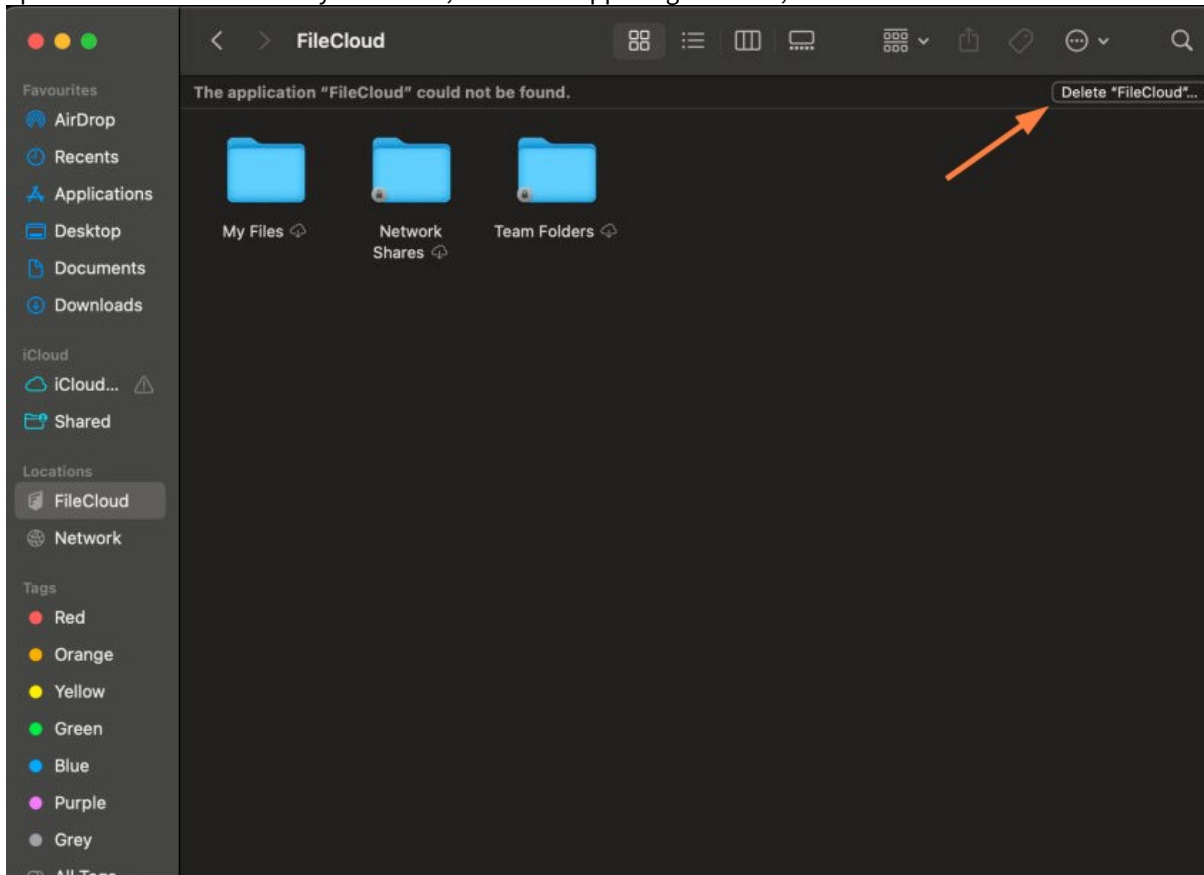
**Problem:**

After upgrading your operating system from macOS Ventura to macOS Sonoma, you are unable to access FileCloud Desktop for macOS.

**Solution:**

1. Uninstall FileCloud Desktop for macOS.

2. Open the FileCloud folder in your Finder, and in the upper-right corner, click **Delete FileCloud**.



3. Once the FileCloud folder is deleted, [reinstall FileCloud Desktop for macOS](#).