

Axcient

# Anchor End User Guide

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**BeckTek**  
I.T. Uncomplicated

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# Getting Started

Your File Sync Tool allows you to share files and folders across your devices, and helps you collaborate and share content with others. Using the system, you can:

- Collaborate with members of your organization, as well as with people outside of your organization
- Manage file revisions and versioning
- Audit and track your files
- Share files and folders through email with the Outlook add-in
- Back up and restore important files

This *User Guide* will help you set up and use the system, and will provide you with the information you need to incorporate the system's toolset into your daily work activities.

## How to Log in to the Web Portal

When a user account is first created for you, you will receive a *Welcome* email from your administrator, providing you with important information to help you get started using the system. For example, your email might include a link to the web portal, a username (or an email address), and a password.

1. Navigate to the URL listed in your email (for example, <https://www.syncedtool.com>).
2. Enter your **username** (or email) and **password**.
3. Click the **Log In** button.

EMAIL

PASSWORD

✓ Login

[Forgot Password?](#)

- a. Alternatively, if you do not remember your password, click the **Forgot Password** link. You will be prompted to enter your **email address** to begin the password-reset process.
4. If Two-Step Authentication is configured for your account, enter your **Authenticator Code** and click the **Login** button.

Enter an authentication code provided by your authenticator app below.

AUTHENTICATION CODE

✓ Login

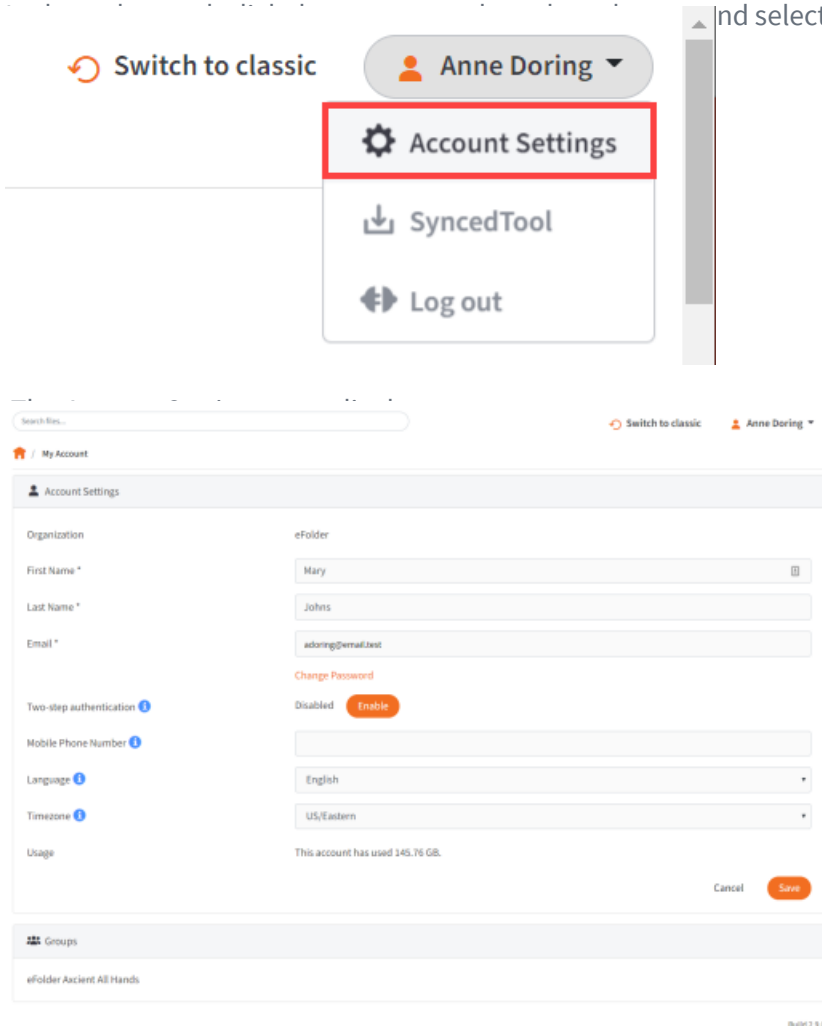
[Need to disable two-step authentication?](#)

## How to Manage Account Settings

In the web portal, you can update your account settings, including your name, email address, and password. You can also set up advanced settings, such as Two-Step Authentication, quota alerts, and WebDAV access.

To manage account settings:

1. In the top right corner, click on your name and select **Account Settings**.



2. In the *Account Settings* page, you can update account information, including:
  - a. Use the *First Name* field to update your **first name**.
  - b. Use the *Last Name* field to update your **last name**.
  - c. Use the *Email* field to update your **email address**.
  - d. Click the *Change Password* link to change your **password**.
  - e. Use the *Mobile Phone Number* field to change your **mobile phone number**.
  - f. In the *Language* drop-down menu, select your preferred **site language**, which controls the language settings displayed in the web portal and mobile apps, as well as number formatting. Leave this field blank to use the default language set for the system, which you will see displayed when you hover over the blue *Question* icon.

- g. In the *Timezone* drop-down menu, select your preferred **timezone**, which affects dates and times displayed across the system. You can also leave this field blank to use the system default, which you will see displayed when you hover over the blue *Question* icon.
3. Optionally, in the *Two-Step Authentication* section, click the **Enable** button to enable Two-Step Authentication. Two-Step Authentication adds an extra layer of security to your account. Each time you log in to the web portal, or register a desktop client, the Outlook add-in, or a mobile device, you will be prompted to enter an authentication code. This code will be delivered to you through a mobile app, a text message, or an email, depending on your settings. For more information, please reference the How to Configure Two Step Authentication section of this guide.
4. In the *Groups* section of the page, you can view the groups to which you belong.
5. Click the **Save** button when you are finished making changes to your account.

## How to Configure Two-Step Authentication

In the web portal, you can optionally configure Two-Step Authentication for your account. In some instances, your administrator might require that you set up Two-Step Authentication.

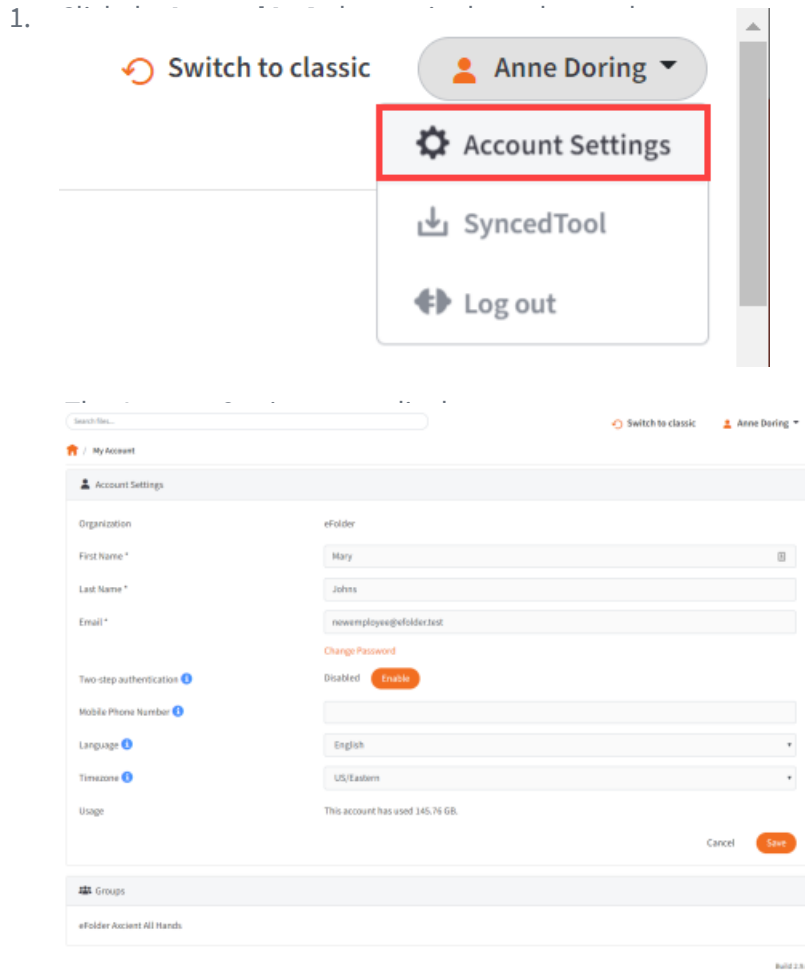
Two-Step Authentication adds a second verification step when you log into the web portal, or register the desktop client, the Outlook add-in, or a mobile device. With Two-Step Authentication, you will be sent an authentication code through an Authenticator Mobile App, text message, or email, depending on your selected configuration. You must then enter this authentication code—along with your username and password—before you can access the web portal, or register the desktop client, the Outlook add-in, or a mobile device.

Two-Step Authentication can be configured in one of two ways.

- You can optionally configure your own Two-Step Authentication settings in your *Account Settings* page.
- Administrators can also require the use of Two-Step Authentication for your organization. If your administrator has turned on this policy, you will be prompted to configure your own Two-Step Authentication settings as soon as you log in to the web portal.

## Configuring Two-Step Authentication

To configure Two-Step Authentication:



2. In the *Two-Step Authentication* section, click the **Enable** button.

**Note:** Your administrator might require that you use Two-Step Authentication. If you are required to set up Two-Step Authentication, you will be prompted to configure an authentication mode when you log in to your account in the web portal.

You will be redirected to the *Enable Two-Step Authentication* page

3. In the *Authentication Mode* field, select the **delivery method** through which you want to receive your authentication code. You can choose from *Authenticator Mobile App*, *Text Message*, and *Email*.

**Note:** If you select Authenticator Mobile App as your delivery method, you must install an authenticator app of your choice, such as Google Authenticator, Amazon AWS Virtual MFA, or any of the many other TOTP-compatible apps available for download.

4. In the *Current Password* field, enter your **password**.
5. In the *Confirm Password* field, confirm your **password**.
6. If you selected **Text message** as your delivery method, you will also be prompted to enter your **mobile phone number**.
7. Click the **Submit** button when you are finished. You will be redirected to the *Confirm Two-Step Authentication* page, which will vary based on your selected delivery method.
  - a. If you selected *Authenticator mobile app* as your delivery method:
    - i. Save the Backup key that is listed in the confirmation page. You will need this key if you need to recover access to your account.
    - ii. On your mobile phone, install a mobile authenticator app, such as Google Authenticator, Amazon AWS Virtual MFA, or any of the many other TOTP-compatible apps available.
    - iii. In the mobile authenticator app, create an account, and enter the secret key to confirm your identity, which you will find listed in the *Confirm Two-Step Authentication* page. A few mobile authenticator apps, such as Google Authenticator, will allow you to scan the barcode to confirm your identity.

- iv. In the web portal, enter the authentication code provided by your authenticator app in the **Authentication Code** field.
- v. Click the **Submit** button when you are finished.

- b. If you selected *Text message* as the delivery method:
  - i. Save the Backup key that is listed in the confirmation page. You will need this key if you need to recover access to your account.
  - ii. You will receive a text message with an authentication code. Enter that code in the **Authentication Code** field.
  - iii. Click the **Submit** button when you are finished.
- c. If you selected *Email* as the delivery method:
  - i. Save the Backup key that is listed in the confirmation page. You will need this key if you need to recover access to your account.
  - ii. You will receive an email with an authentication code. Enter that code in the **Authentication Code** field.
  - iii. Click the **Submit** button when you are finished.

## Accessing the Web Portal

After your Two-Step Authentication settings are configured, you will be prompted for a second step authentication code each time you log in.

**Note:** Authentication codes are only valid for a limited amount of time. Make sure you enter your validation code promptly.

If you are ever unable to provide the correct authentication code, you can use the Backup key to recover your account.

1. In the *Login* page, click the **Need to disable two-step authentication** link.

Enter an authentication code provided by your authenticator app below.

AUTHENTICATION CODE

✓ Login

**Need to disable two-step authentication?**

The *Account Recovery* page displays.

Account Recovery

Enter your email and backup key below to disable two-step authentication for your account. Once disabled, you may log in using only your user name and password.

EMAIL

BACKUP KEY

Cancel ✓ Request

2. In the *Account Recovery* page, enter your **email address** as well as the **Backup key** that was saved when you first configured your verification settings.
3. Click the **Request** button when you are finished. When Two-Step Authentication has been disabled, you will be able to log in using just your username and password.

## Registering the Desktop Client

When registering the desktop client for the first time, you will be asked to enter an authentication code.

1. If Two-Step Authentication has been enabled for your organization or for your user account, you will be prompted to enter an authentication code at the time of registration.

**Two-Step Authentication**

Please supply the Authentication Code provided via email, SMS or app.

AUTHENTICATION CODE

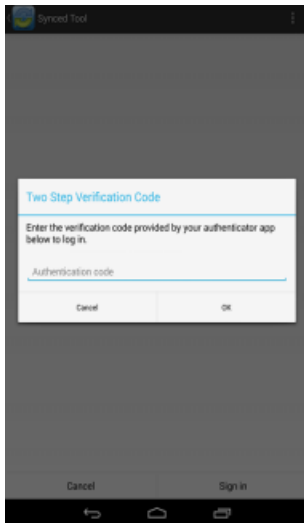
[Unable to access Authentication Codes?](#)

2. After you receive your authentication code, enter the **authentication code** and press the **Next** button. You can then complete the registration process.

## Registering and Accessing Mobile Apps

When accessing your mobile app for the first time, you will be prompted to enter an authentication code. You will also be asked to configure a passcode (also called a PIN if you are using an Android device) when you access your mobile app at subsequent sessions.

1. If Two-Step Authentication has been enabled for your organization or for your user account, you will be prompted to enter an authentication code at the time of initial registration. Enter the **authentication code** and press the **OK** button.



*Image of the Android App Two Step Authentication Prompt*

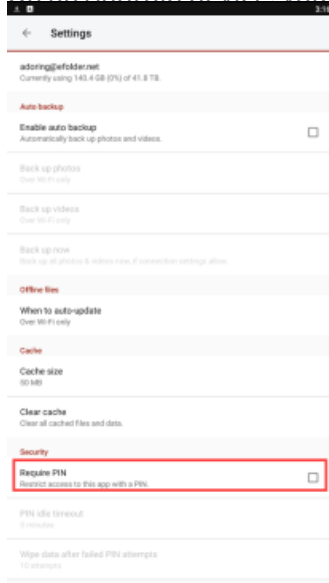


*Image of the iOS App Two Step Authentication Prompt*

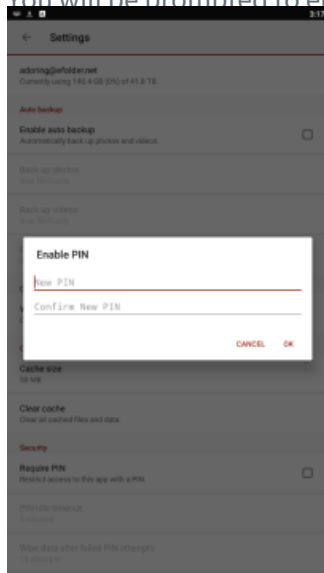
2. If Two-Step Authentication has been enabled for your entire organization, you will also be asked to configure a passcode (for your iOS device) or a PIN (for your Android device). At subsequent sessions, you will be prompted to enter this PIN or passcode when you access your mobile app.

**Note:** If Two-Step Authentication has been turned on only for your user account (either by you or by your administrator) you will not be required to configure a passcode or PIN.

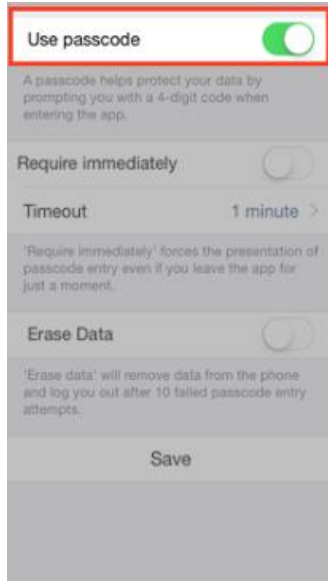
- a. On an Android device, you will be directed to the *Settings* page. Select **Require PIN**.



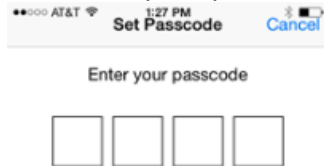
You will be prompted to enter a **PIN**.



- b. Alternatively, if you are using an iOS device, you will be directed to the *Settings* page. Select **Use Passcode**.



You will be prompted to enter a **Passcode**.



- c. When accessing the mobile app in the future, you will be prompted to first enter this PIN or passcode.

## Registering and Accessing the Outlook Add-In

When accessing the Outlook add-in for the first time, you will be prompted to enter an authentication code. You will also be prompted for an authentication code when opening a new Outlook session, or when changing your add-in credentials.

1. If Two-Step Authentication has been enabled for your organization or for your user account, you will be prompted for an authentication code when you open Microsoft Outlook.

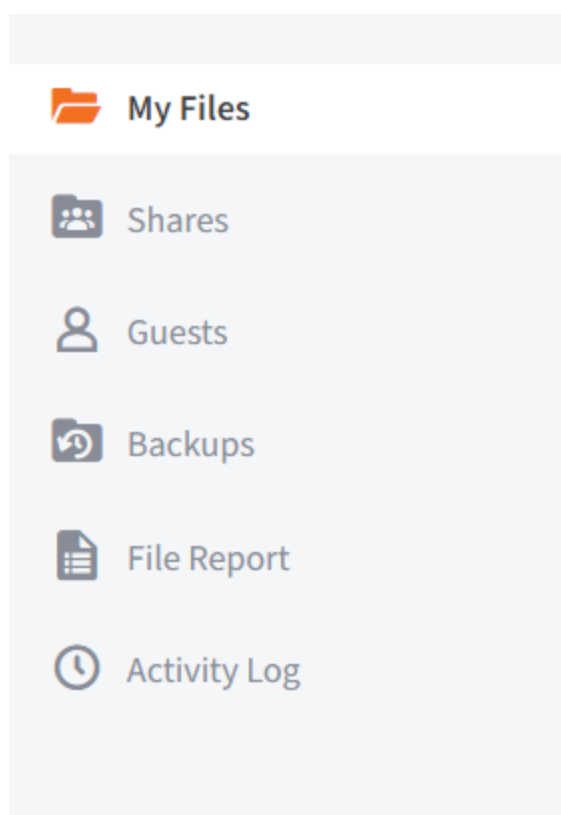


2. After you receive your authentication code, enter the **authentication code** and press the **OK** button. You will be prompted for this authentication code at the time of add-in registration, when opening a new Outlook session, or when changing your add-in credentials.

# The Web Portal

After you have an account, you can begin to create and upload content into the web portal. The web portal provides user-friendly features—including drag and drop functionality, multi-select options, and the ability to view dozens of file types directly in your web browser.

In the web portal, you can access your personal dashboard, search for files and folders, and manage your personal and shared content. For example, you can:



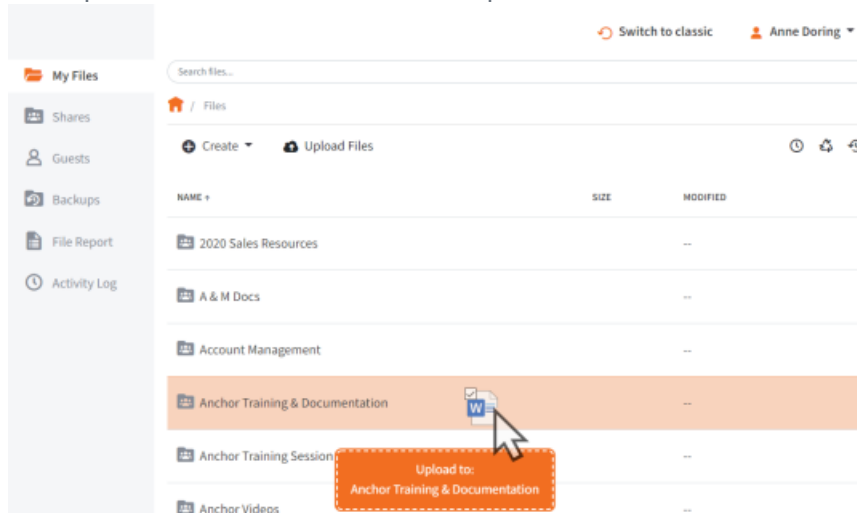
- Click the **Files** tab to access your files and folders or create new files and folders.
- Click the **Shares** tab to access Team Shares, items shared by you, and items shared with you.
- Click the **Guests** tab to collaborate and share with people outside of your organization.
- Click the **Backups** tab to create and manage your backups.
- Click the **File Report** tab to view or export a list of your files.
- Click the **Activity Log** tab to review your activity within the system.

## How to Upload Files in the Web Portal

When files and folders are uploaded to the web portal, all of these items will propagate down to any of your connected devices, such as your mobile device or your local machine. You can access your uploaded content from any computer that has a supported web browser and an Internet connection.

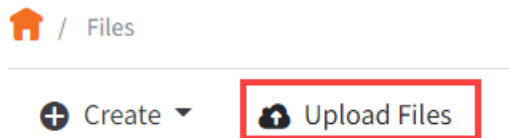
To upload files in the web portal:

1. In the web portal, click the **Files** tab. The *Browse Files* page displays.
2. Navigate to the appropriate location, and then drag and drop files and folders onto the page, or into a personal folder or Team Share. Uploaded folders will retain their original structure.

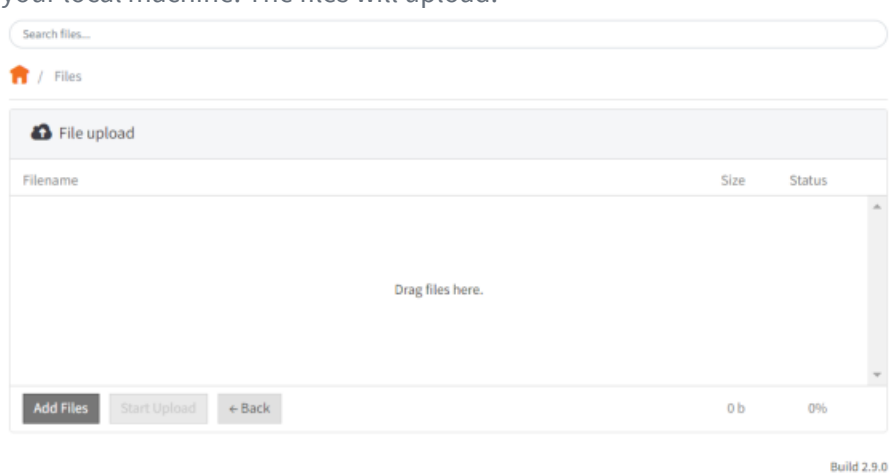


An *Upload Files* pop-up window displays, showing you the status up the upload process.

- a. Alternatively, while inside the appropriate folder, click the **Upload Files** button. The *Upload Files* page displays.



- b. In the *Upload Files* page, you can drag and drop files onto the page and click the **Upload** button. The files will upload. Or, click the **Add Files** button to manually search for files on your local machine. The files will upload.

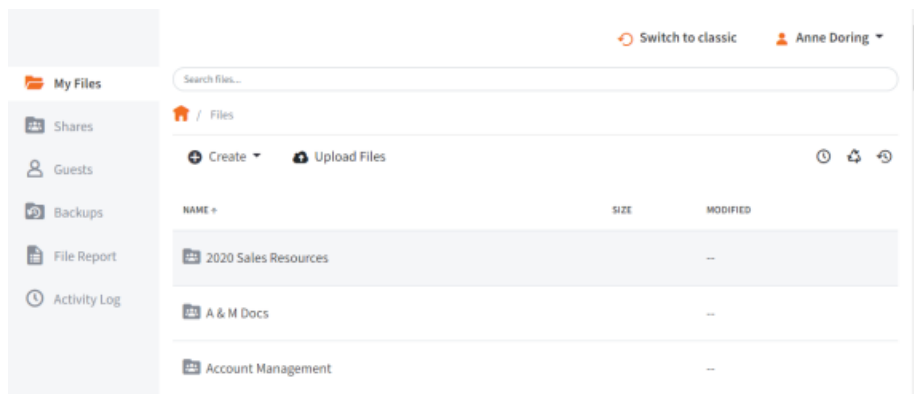


## How to Create and Manage Files and Folders in the Web Portal

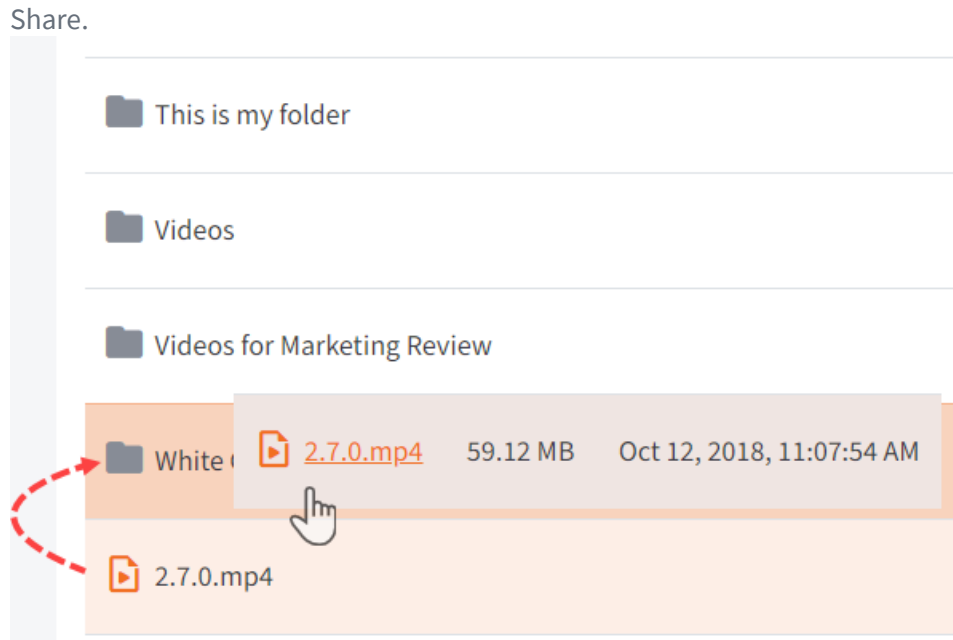
You can create and manage all of your files and folders in the *Browse Files* page of the web portal. In this page, you can utilize advanced drag and drop functionality, create files folders, upload files, and manage revisions. You can also preview dozens of file types directly in your web browser and edit files simultaneously with coauthors using the fully integrated Collaborative Web Editor.

### Finding Content

1. In the web portal, click the **Files** tab. The *Browse Files* page displays, giving you access to your files, folders, and Team Shares.



2. To quickly organize your content, drag and drop files and folders within the *Browse Files* page. You cannot drag and drop a personal file or folder into a Team Share. You can, however, drag and drop personal files and folders, or drag and drop files and folders while inside a Team



3. You can also select multiple items at one time by holding down the **Shift** key on your keyboard. You can then perform mass actions, including download, lock, move, deleted, and more.

## Previewing Content

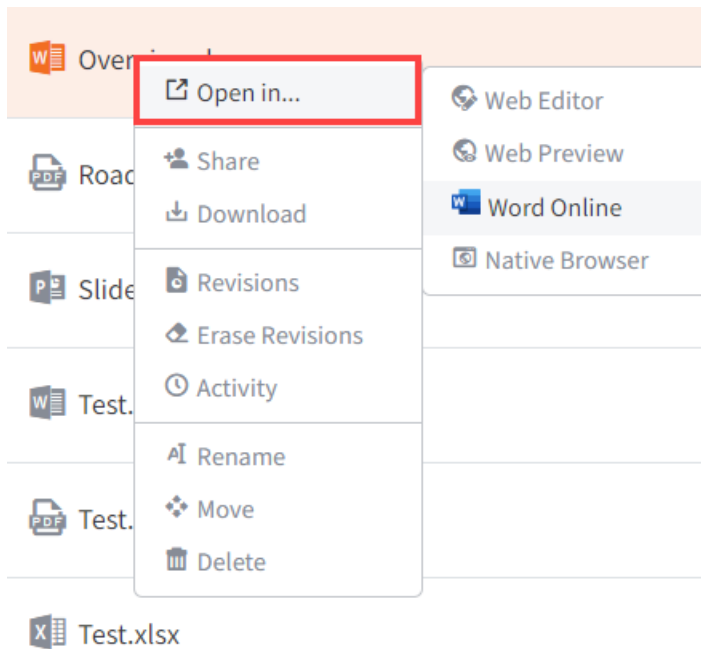
1. To preview a file in your web browser, right-click the file and select **View**. Or, simply click the file to view its contents.

The selected file will open, allowing you to utilize advanced search tools, select and copy text, print, download, and more.

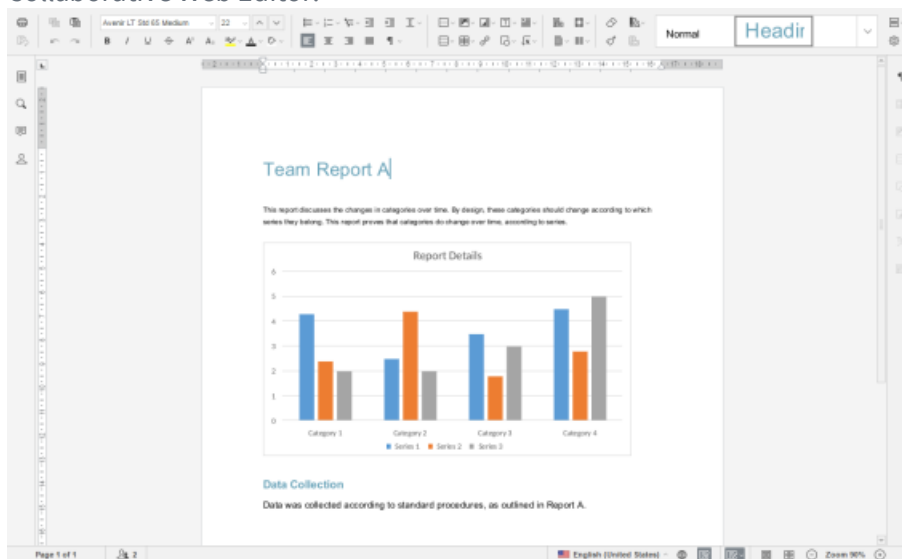
2. Click the **Close** button when you are finished previewing the file.

## Editing Content

1. Right-click a supported file type, point to **Open in** and select your preferred **editor**. Depending on administrative settings, you might have access to the Web Editor or a Microsoft app.



For example, if you select **Web Editor**, the file opens in the fully integrated, real-time Collaborative Web Editor.



2. In the Collaborative Web Editor, you can access a wide-range of formatting tools to help you update fonts, paragraph formats, charts, tables, images, style types, and more. Additionally, you can edit simultaneously with coauthors, send and receive chats, and view and manage comments.

## Creating and Managing Content

1. In the *Files* tab of the web portal, you can use the toolbar buttons to manage content in the selected folder.

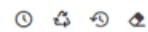
- a. Click the **Create** drop-down button to create a new file or folder inside the web portal.
- b. Click the **Upload Files** button to add files to the web portal.
- c. Click the **Rollback** button to restore all files within the entire folder to an earlier revision before a selected date. The Revision Rollback feature is particularly useful in situations where a file might have been corrupted by ransomware; it utilizes a file's revision history, and restores all currently-existing content in the folder to a healthy revision at a specified point-in-time. In these cases, you can use the Activity Log to determine when the infected revisions were uploaded, and then roll back files prior to the point of infection.
- d. Click the **Show Deleted** button to show files that have been deleted.
- e. Click the **Restore Deleted** button to return any deleted files to their original location.
- f. Click the **Erase all Revisions** button to erase previous revisions.



Create ▾



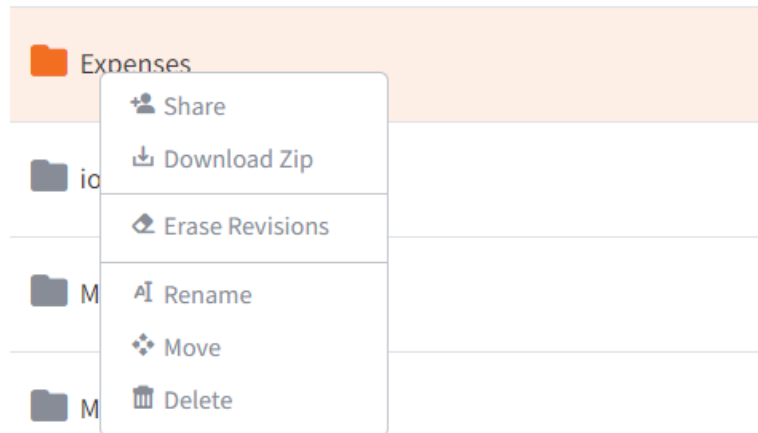
Upload Files



## 2. Use the *folder menu* to manage individual folders:

- a. Right-click a folder. A *menu* displays.
- b. In the *menu*, you can:
  - Click the **Share** link to create a share link to the folder and its contents.
  - Click the **Download ZIP** link to download the entire folder as a ZIP file to your local machine.
  - Click the **Erase Revisions** link to remove previous revision of the folder from the system.
  - Click the **Rename** link to rename the title of the folder.
  - Click the **Move** link to change the path of the folder.
  - Click the **Delete** link to delete the folder from the system.

**Note:** When you delete an item, it is still stored in the system for a pre-determined number of days. Within this timeframe, you can restore a deleted file. Please contact your administrator for more information.



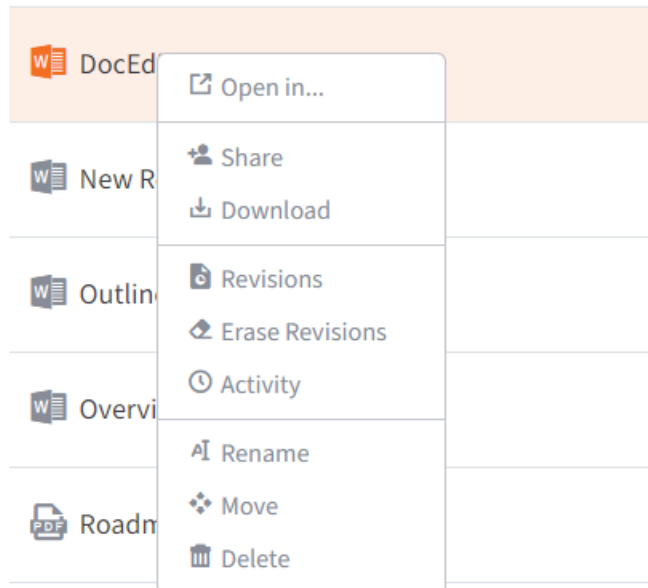
3. Alternatively, you can use the *file menu* to manage individual files; or, press and hold down the **Shift** key to select multiple files at one time.

a. Right-click a file. A *menu* displays.

b. In the *menu*, you can:

- Click the **Open in** link to launch the file in the native browser, the Collaborative Web Editor, Microsoft 365 (if applicable), or the Web Preview tool.
- Click the **Share** link to create a share link to the file.
- Click the **Download** link to download the file to your local machine.
- Click the **Revisions** link to view a list of revisions to the file, and optionally restore a previous revision.
- Click the **Erase Revisions** link to remove previous revision of the file from the system.
- Click the **Activity** link to review activity or events for the selected file.
- Click the **Rename** link to rename the selected file.
- Click the **Move** link to change the path of the selected file.
- Click the **Delete** link to delete the file from the system.

**Note:** When you delete an item, it is still stored in the system for a predetermined number of days. Within this timeframe, you can restore a deleted file. Please contact your administrator for more information.

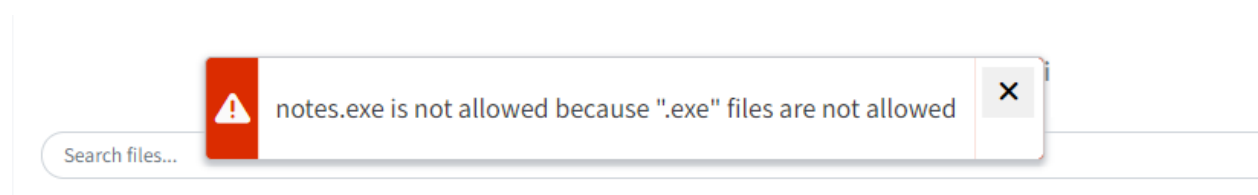


## A Note about Excluded Extensions

While most of your files and folders will easily sync across all of your devices, certain system files and folders, as well as temporary application files, will not sync. Your administrator may have also configured other file extension types—such as application or video files—to be excluded from the syncing process.

You can add files with excluded extensions to Synced Folder, but they will not display in the web portal or in your mobile apps.

If you upload a file with an excluded extension through the web portal, you will receive a notification that the file is on the exclusion list. This file will not appear in the web portal or in your mobile apps.

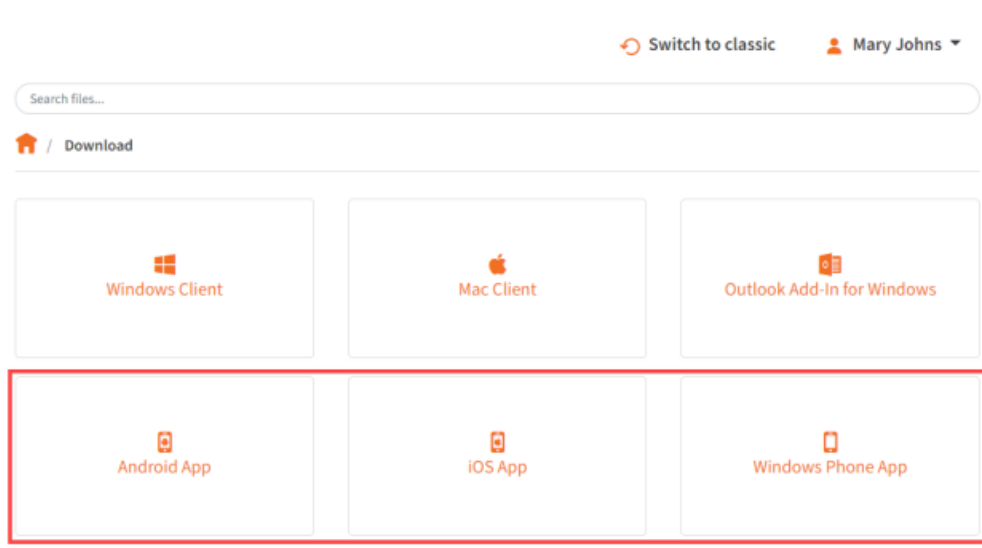


## Live Databases

The system does not support the syncing of live database files, including Microsoft Access Databases, QuickBooks Files, .pst Files, and so forth. Attempting to sync a live database file could result in errors and collisions.

# Mobile Apps

In addition to using the web portal or the desktop client on your local machine, you can manage files and folders from an app on your mobile device. Mobile app versions include Android and iOS.



## How to Download Mobile Apps

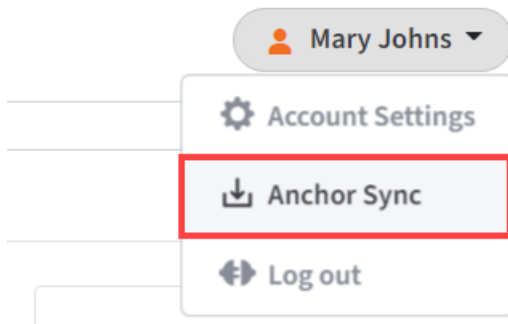
You can manage your files and folders from various mobile apps, including the Android app, the iOS app, or the Windows Phone app.

- Find and download the Android app in Google Play,
- Find and download the iOS app (for your iPhone or iPad) in iTunes, and
- Find and download the Windows Phone app in the Windows Phone site.

Alternatively, you can access a direct link to your device-specific app in the web portal.

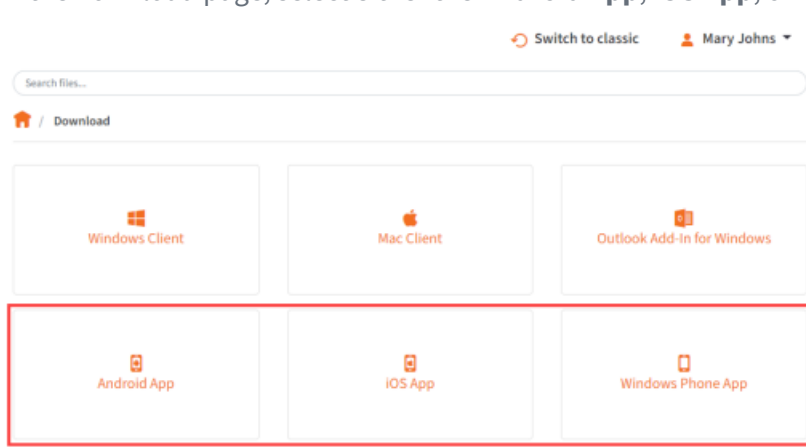
To find your device-specific app:

1. Click the user profile icon in the top right corner, click the down button and select **Sync**.



The *Download* page displays.

2. In the *Download* page, select either the **Android App**, **iOS App**, or **Windows Phone App** button.



You will be redirected to the page that will allow you to download and install your device's app.

## How to Use the Android App

If you use an Android device, you can download the Android app in Google Play. The app allows you to:

- View, rename, delete, and move content,
- Upload content from your device,
- Easily edit Microsoft 365 content,
- Lock files and folders,
- Share files and folders (including secure shares),
- Manage share links,
- Automatically back up your photo gallery to a synced folder, called Camera Uploads, and

- Pin files so that they are fully downloaded on your device.

## Logging In

To log in to your Android device:

1. In your Android device, press the app icon to launch the app. The *Login* screen displays, prompting you to enter your credentials.
  - a. In the *Host* field, enter the **host name** of the system (for example, syncedtool.com).
  - b. In the *User* field, enter your **username** (for example, [user@mail.com](mailto:user@mail.com)).
  - c. In the *Password* field, enter your **password**.
  - d. Press the **Sign in** button when you are finished.



- i. If Two-Step Authentication has been enabled for your organization or for your user account, you will be prompted to enter an authentication code at the time of

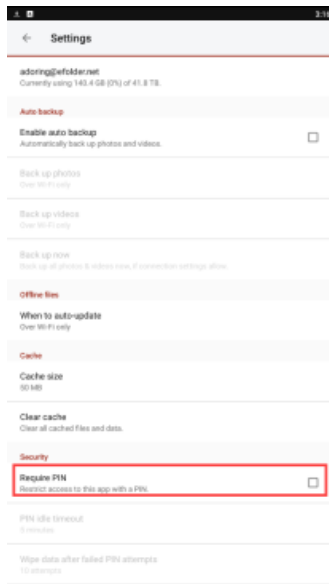
initial registration. Enter the **authentication code** and press the **OK** button.



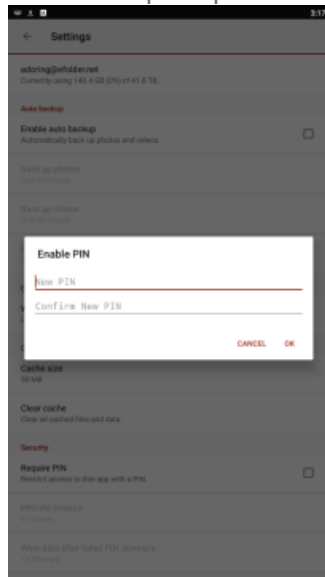
- ii. If Two-Step Authentication has been enabled for your entire organization, you will also be asked to configure a PIN after the initial registration process.

**Note:** If Two-Step Authentication has been turned on only for your user account (either by you or by your administrator) you will not be required to configure a PIN.

- iii. You will be directed to the *Settings* screen. Select **Require PIN**.



You will be prompted to enter a **PIN**.



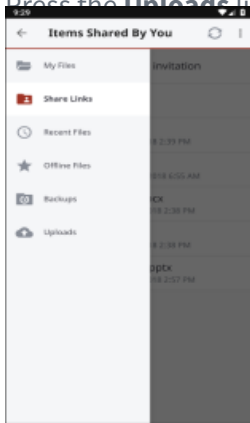
- iv. When accessing the mobile app in the future, you will be prompted to first enter this PIN.

## Navigating

When you have access to your account, you can use the app to open, view, and manage content. For example:

1. Press the **menu** tab to manage your Android app.
2. Press the **My Files** link to view a listing of your files, folders, and Team Shares.
3. Press the **Share Links** link to view a list of items shared by you.
4. Press the **Recent Files** link to view your most recent files.
5. Press the **Offline Files** link to view a list of pinned files that can be viewed offline.
6. Press the **Backups** link to view a list of your backups.

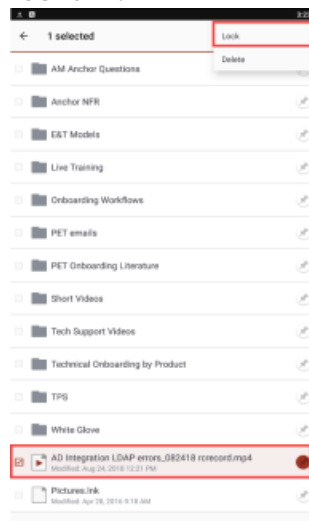
7. Press the **Uploads** link to view a listing of files uploaded from your device.



## Locking a File or Folder

Optionally, you can lock a file or folder. To lock a file or folder:

1. In the *My Files* screen, navigate to a Team Share.
2. Within the Team Share, select the file or folder you want to lock.
3. In the top right-hand corner of the screen, press the **more options** button and then press the **Lock** link.



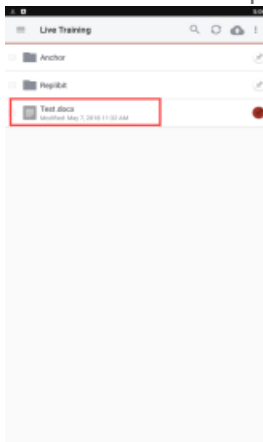
The file is now locked.

## Editing Files and Folders

To edit files with Microsoft 365:

**Note:** To edit content with Microsoft 365, you must first download supported Microsoft 365 applications. File formats supported for editing include \*.docx, \*xlsx, and \*.pptx.

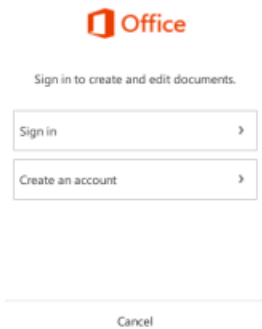
1. Download the Microsoft Word app, Microsoft Excel app, or the Microsoft PowerPoint app, depending on your needs and preferences.
2. With the Microsoft app installed, press the appropriate **file** that you want to edit.



3. The file will open in the Microsoft app, and will prompt you to sign in to your Microsoft 365 account, if you are not already signed in. Press the **Sign In** button.



4. The *Microsoft 365 Sign In* screen displays, asking you to either sign in or create a new account.

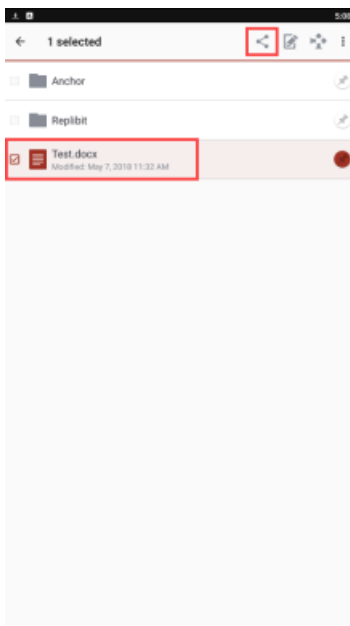


5. When you are finished signing in, the file will display in the Microsoft app. Use the toolbar to edit the file as appropriate.
6. Save your file when you are finished. The file will synchronize.

## Sending Share Links

You can also send share links directly from your mobile app. To send a secure or public share:

1. In the *My Files* screen, select the file or folder that you want to share and press the **Share** button.



2. In the *Choose a share type* window, select **Public share** to send a standard share. Alternatively, select **Secure share** to send a secure share, which will require the recipient to log in before he or she can access the shared item.

3. Press **OK** to confirm your selection.

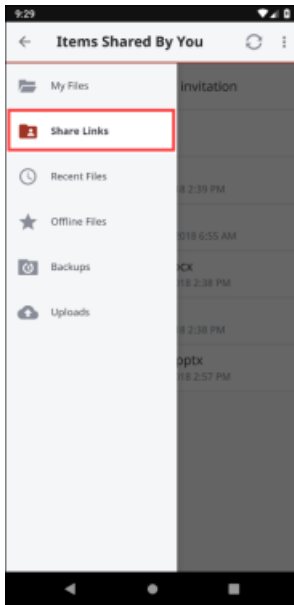
**Note:** If your administrator has configured settings to only allow secure shares, you will only have the option to send a secure share.



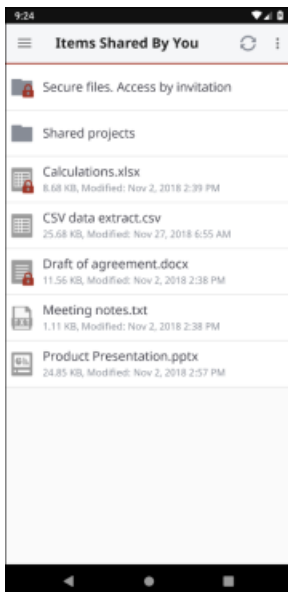
4. In the *Create a secure share* window, enter your recipient's email address and press the **OK** button. Your item will be shared with the specified recipient.



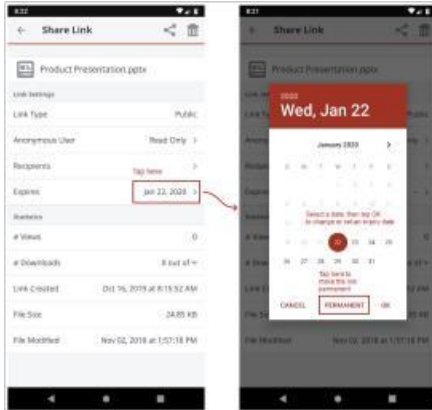
5. To view a list of share links that you have generated, click the **menu** tab and select the **Share Links** link.



6. In the *Items Shared By You* screen, you can view a list of shared items. Secure share links are indicated by a lock icon.



7. Select an item in the list to manage share link details. For example, you can set an expiry date, change an existing expiry date, and make a share link permanent.



## Backing Up the Gallery

You can also automatically back up your mobile phone's camera gallery to a synced folder using the Auto Backup feature. When this feature is turned on, your mobile app will automatically back up photos, videos, or both, to a synced folder called Camera Uploads. With this feature, you always have a backup of your mobile photos and videos.

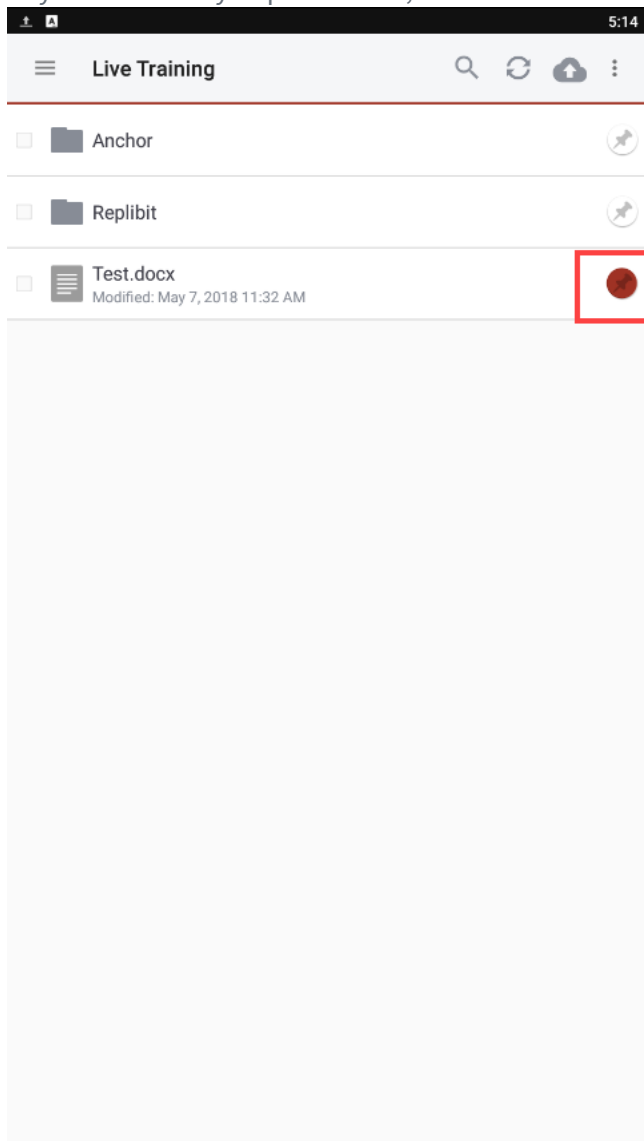
1. In the top right-hand corner of the screen, press the more options button and select the **Settings** link. The *Settings* screen displays.
2. In the *Settings* screen, press the **Enable Auto Backup** option.
3. Press the **Back Up Photos** option to configure settings for backing up photos in your photo gallery:
  - Select **Never** if you don't want to back up your photos.
  - Select **Over Wi-Fi Only** to back up photos only when you are connected to Wi-Fi.
  - Select **Over Wi-Fi or Mobile Network** to back up your photos whether you are connected to Wi-Fi or on your mobile network. Please note that uploading over your mobile network will use your data connection, and charges from your service provider may apply.
4. Press the **Back Up Videos** option to configure settings for backing up videos in your photo gallery:
  - Select **Never** if you don't want to back up your videos.
  - Select **Over Wi-Fi Only** to back up videos only when you are connected to Wi-Fi.

- Select **Over Wi-Fi or Mobile Network** to back up your videos whether you are connected to Wi-Fi or on your mobile network. Please note that uploading over your mobile network will use your data connection, and charges from your service provider may apply.
5. Press **Back Up Now** if you want to back up your photos and videos immediately, if allowed by your connection settings configured above.

## Pinning Files for Offline Viewing

Finally, you can pin files so that they are downloaded to your device. Your mobile app will be aware of unpinned files, but only pinned files will be fully downloaded. You can decide to pin and unpin files based on space limitations and access needs.

1. In the *My Files* screen, select the **Pin** button next to the file or folder that you want to download to your device. If you pin a folder, all of its files will be pinned as well.



2. When you unpin a file, it will remain on your mobile device until your cache is cleared. You can manually clear your cache through the *Settings* screen.

## How to Use the iOS App

If you use an iOS device, such as an iPhone or an iPad, you can download the iOS app in iTunes. This app allows you to:

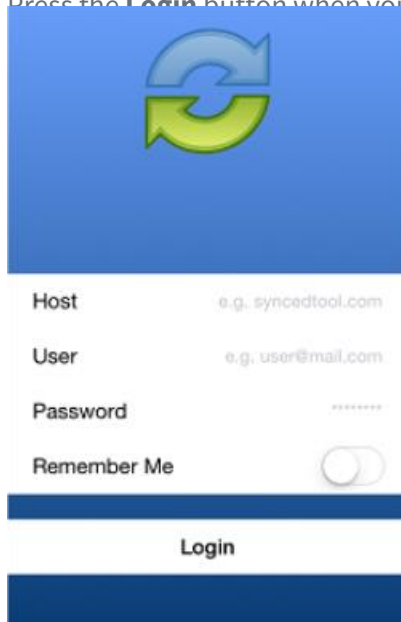
- Open and view files and folders,
- Edit files,
- Lock files and folders,
- Share files and folders,
- Manage share links,
- Upload content from your device, such as photos,
- Automatically back up your camera roll to a synced folder, called Camera Uploads,
- Rename, delete, and move items, and
- Favorite items for offline viewing.

## Logging In

To log into the iOS app:

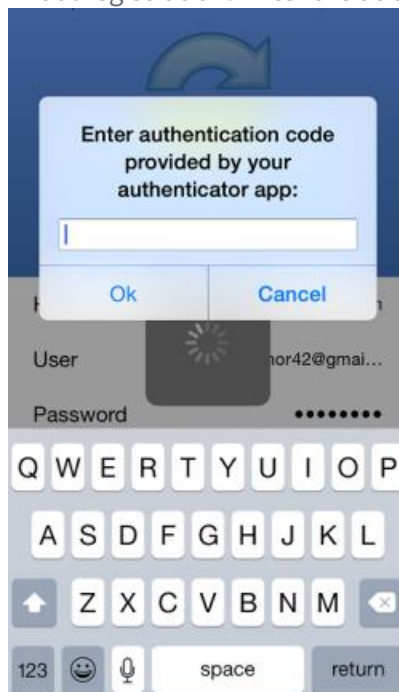
1. In your iOS device, press the app icon to launch the app. The *Login* screen displays, prompting you to enter your credentials, including:
  - a. In the *Host* field, enter the **host** of the system (for example, `syncedtool.com`).
  - b. In the *User* field, enter your **username** (for example, `user@mail.com`).
  - c. In the *Password* field, enter your **password**.

- d. Press the **Login** button when you are finished.



The screenshot shows a login form with a blue header containing a refresh icon (two curved arrows, one blue and one green). Below the header are four input fields: 'Host' with a placeholder 'e.g. syncedtool.com', 'User' with a placeholder 'e.g. user@mail.com', 'Password' with a masked field '\*\*\*\*\*', and a 'Remember Me' toggle switch. At the bottom of the form is a blue button labeled 'Login'.

- i. If Two-Step Authentication has been enabled for your organization or for your user account, you will be prompted to enter an authentication code at the time of initial registration. Enter the **authentication code** and press the **OK** button.

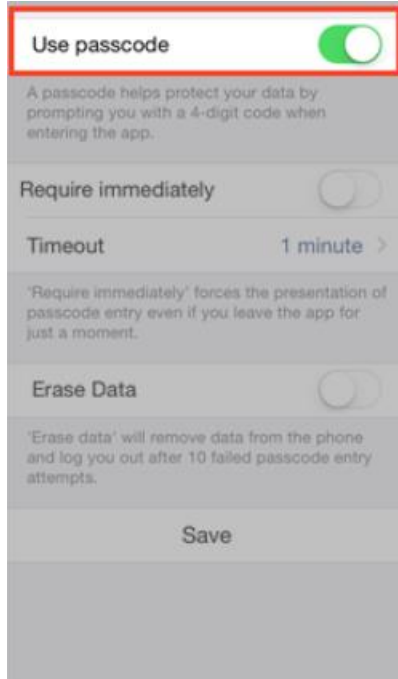


The screenshot shows a mobile app interface. A dialog box is displayed in the foreground with the text 'Enter authentication code provided by your authenticator app:'. Below the text is an empty input field. At the bottom of the dialog are two buttons: 'Ok' and 'Cancel'. In the background, a login form is visible with a loading spinner over the 'User' field (containing 'hor42@gmai...') and a masked 'Password' field. A standard QWERTY keyboard is shown at the bottom of the screen.

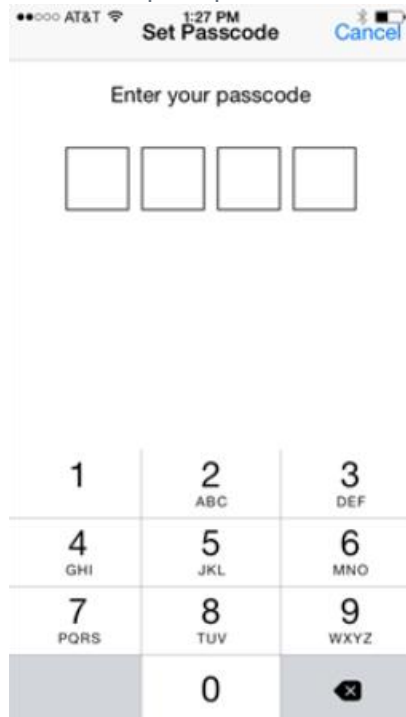
- ii. If Two-Step Authentication has been enabled for your entire organization, you will also be asked to configure a passcode after the initial registration process. At subsequent sessions, you will be prompted to enter this passcode when you access your mobile app.

**Note:** If Two-Step Authentication has been turned on only for your user account (either by you or by your administrator) you will not be required to configure a passcode.

- i. You will be directed to the *Settings* screen. Select **Use Passcode**.



You will be prompted to enter a **Passcode**.



When accessing the mobile app in the future, you will be prompted to first enter this passcode.

## Navigating

When you have access to your account, you can use the app to open and view files, manage files, and upload content. For example:

1. Press the **Files** button to view and manage your files and folders; you can rename or move an item or mark it as a favorite.
2. Press the **Share Links** button to view a list of items shared by you.
3. Press the **Backups** button to view a list of your backups.
4. Press the **Favorites** button to view a list of items that you have marked as favorites.
5. Press the **Upload** button to upload content—such as images—from your phone to the server.
6. Press the **Settings** button to view your account information, such as the app revision, your user name, space usage, passcode lock settings, and local storage settings. You can also turn on the option to only upload content over a wifi connection.

## Operations

Synced Tool for iOS provides a variety of actions a user can perform on a file or folder:

---

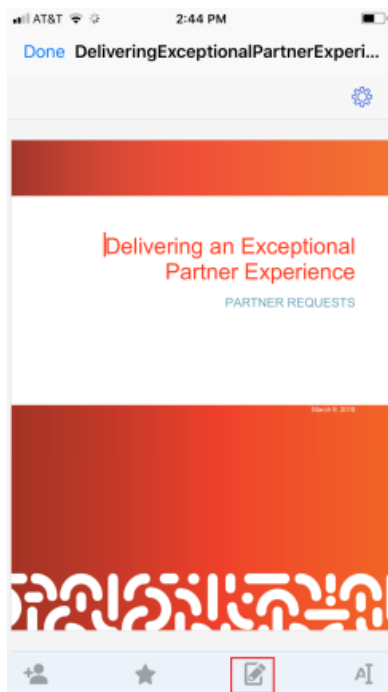
Operation	Action
Open with Options	Long tap on a file.
Share, Favorite, Rename	Swipe to the right on a file of folder.
Delete	Swipe to the left on a file of folder.
Lock	Click <b>Edit</b> and select item(s).

---

## Viewing and Editing Files

You can access and view files using the iOS app, allowing you to preview and edit content without fully downloading it to your mobile device. You can also use the Collaborative Web Editor to edit and collaborate with coauthors in real time. In this way, you can review and update content without utilizing mobile resources.

1. Press the **Files** button. The *Files* screen displays.
2. In the *Files* screen, find the file that you want to view.
3. Press the title of the file. The file opens, allowing you to review content without utilizing mobile resources.
4. Click the **Edit** button to open the file in edit mode.



The Collaborative Web Editor opens in edit mode, allowing you to edit the file and collaborate with coauthors in real time.

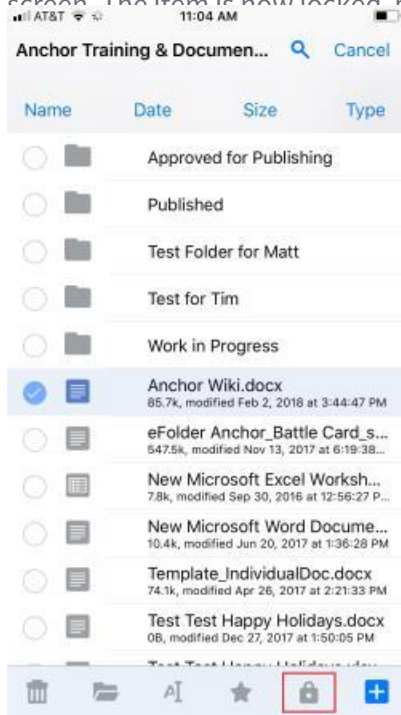


## Locking Files and Folders

Optionally, you can lock a file or folder within a Team Share. To lock a file or folder:

1. Press the **Files** button. The *Files* screen displays.
2. In the *Files* screen, press the **Edit** link at the top right-hand corner of the screen.

3. Select the appropriate file or folder, and then press the **Lock** button at the bottom of the screen. The item is now locked, preventing other users from accessing your content.

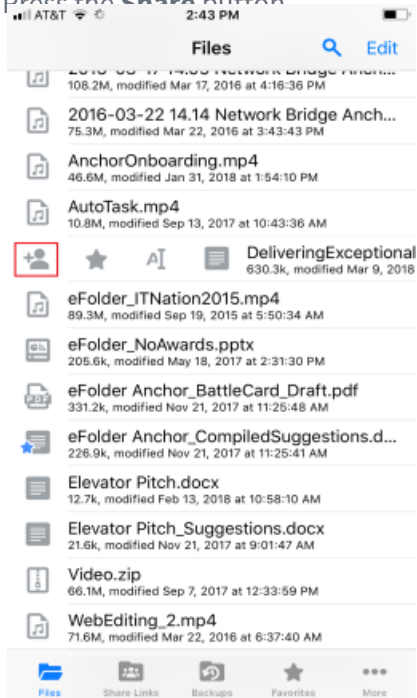


## Sharing Files and Folders

You can also share files and folders directly within your app. To share a file or folder, or to send a secure share:

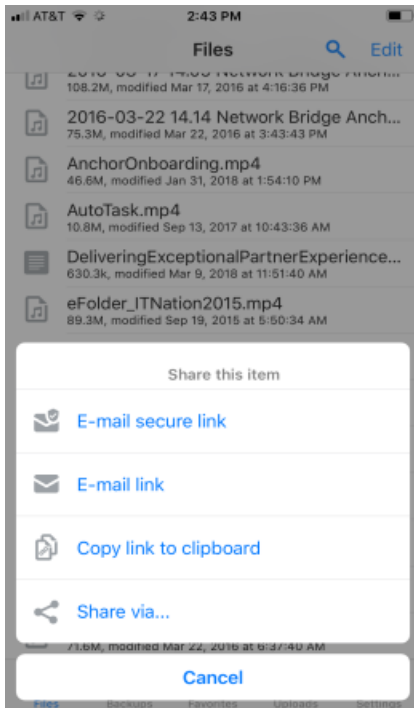
1. Press the **Files** button. The *Files* screen displays.
2. In the *Files* screen, find the file or folder that you want to share and slide it to the right.

3. Press the Share button



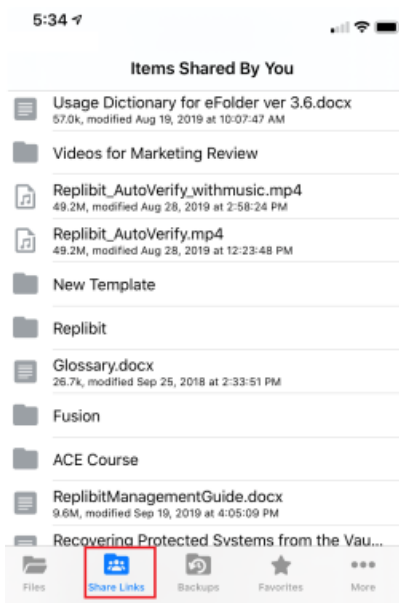
4. To send a share link, press the **E-mail link** option. Alternatively, to send a secure share, press the **E-mail secure link** option.

**Note:** If your administrator has configured settings to only allow secure shares, you will only have the option to send a secure link.



You will be prompted to select a recipient and compose an email message.

- To manage share links you created, press the **Share Links** button.

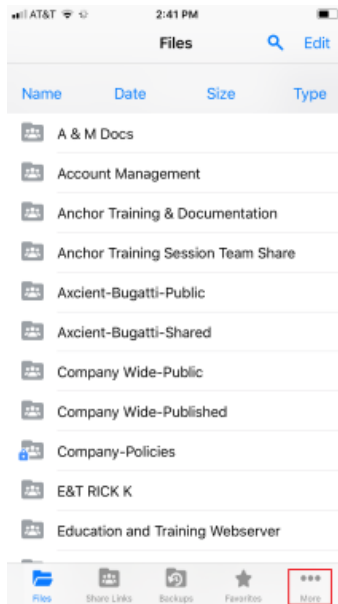


- Select an item in the list to view share link information and statistics. Secure share links are indicated by a lock icon.

## Backing Up the Camera Roll

You can also automatically back up your mobile phone's camera roll to a synced folder using the Auto Backup feature. When this feature is turned on, your mobile app will automatically back up photos, videos, or both, to a synced folder called Camera Uploads. With this feature, you always have a backup of your mobile photos and videos.

1. Press the **More** button and select the **Settings** link.



The *Settings* screen displays.

2. In the *Settings* screen, press the **Camera Upload** option. The *Camera Upload* menu displays.
  - Select the **Enable Camera Upload** option to back up photos on your device.
  - Select the **Upload Videos** option to back up videos on your device.
  - Select the **Background Upload** option to initiate backups without accessing the app.

**Note:** When uploading content over your mobile network, charges from your service provider may apply.

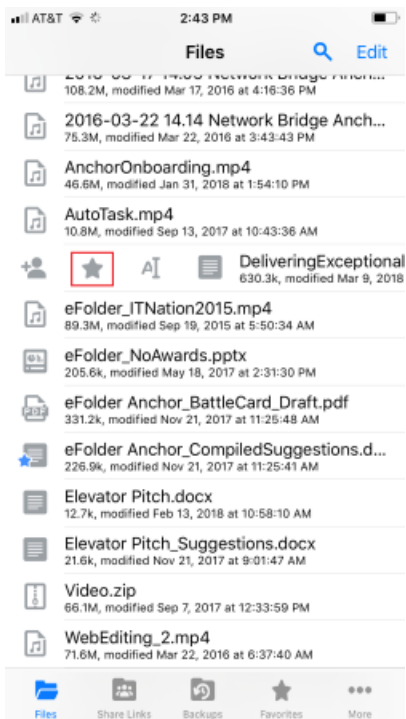


3. Back in the *Settings* screen, you can optionally turn on the **Only Upload over wifi** option to upload content only when you are connected to a wifi connection. This setting will help you avoid charges from your service provider.

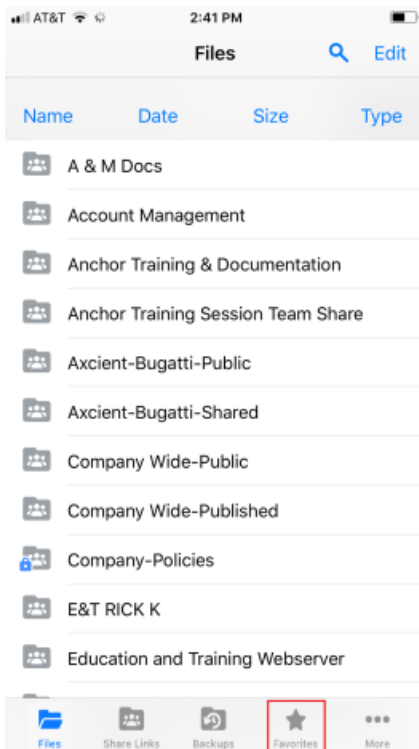
## Setting a File or Folder as a Favorite for Offline Viewing

Finally, you can mark files and folders as a favorite so that they are downloaded to your device. Your mobile app will be aware of files that are not favorites, but only favorite files and folders will be fully downloaded. You can decide to favorite and unfavorite files and folders based on space limitations and access needs.

1. In the *Files* screen, slide the appropriate file or folder to the right to reveal a set of options for that file or folder.
2. Press the **Favorite** button (star icon) to mark the file as a favorite. If you favorite an entire folder, all of its files will become favorites as well.



- To view a full list of favorite files and folders, press the **Favorites** button.



# The Desktop Client for Windows and Mac Machines

In addition to using the web portal and mobile apps, you can also manage files and folders from your computer (local machine) using the desktop client.

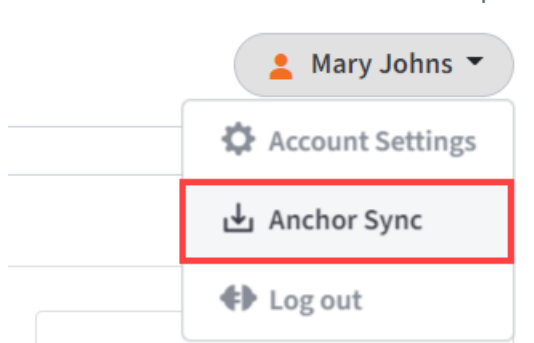
The desktop client includes a folder, called Synced Folder, which stores your files and folders on your local machine. Files and folders that are added to Synced Folder will automatically sync to the web portal and any other devices you have connected to your account. You can use the desktop client on both Windows and Mac machines.

## How to Download the Desktop Client

When you download and install the desktop client, you can access your files and folders directly on your computer (local machine).

To download the desktop client on a Windows or Mac machine:

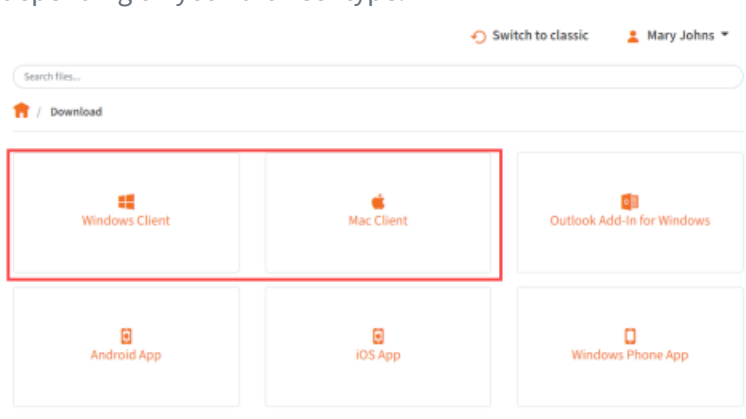
1. Click the **Download** button in the web portal.



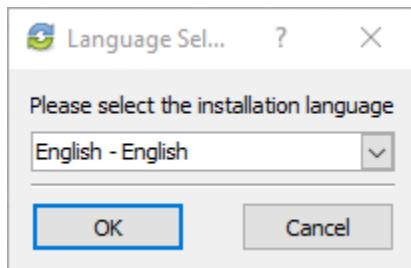
The *Download* page displays.

2. In the *Download* page, select either the **Windows Desktop Client** or **Mac Desktop Client** button. The selected file will start to download, or you will be prompted to save the file,

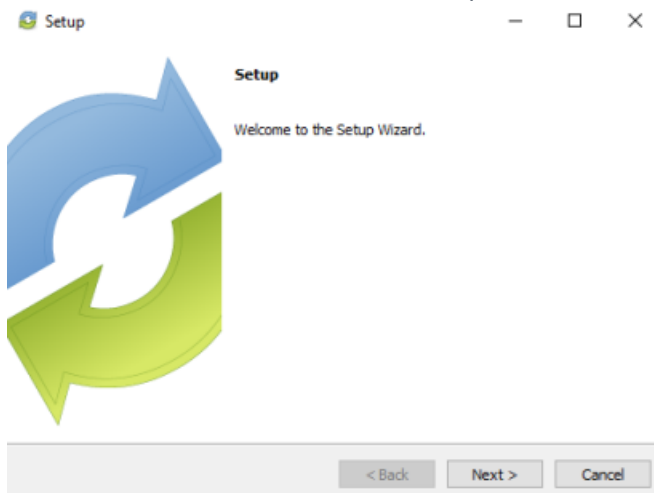
depending on your browser type.



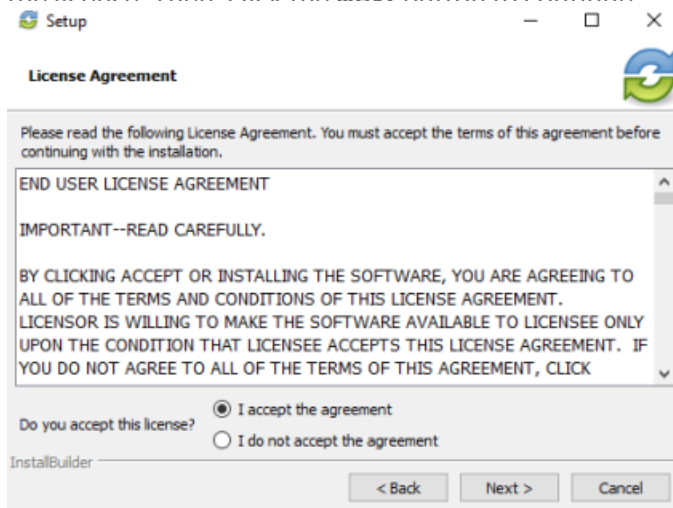
3. When the file finishes downloading, click the **installation** file to launch the *Setup Wizard*.
4. Select your language and click the **OK** button to continue.



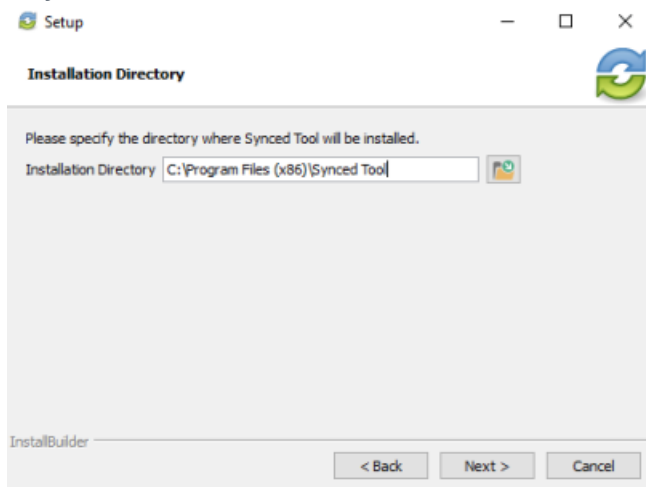
5. Click the **Next** button to start the *Setup Wizard*.



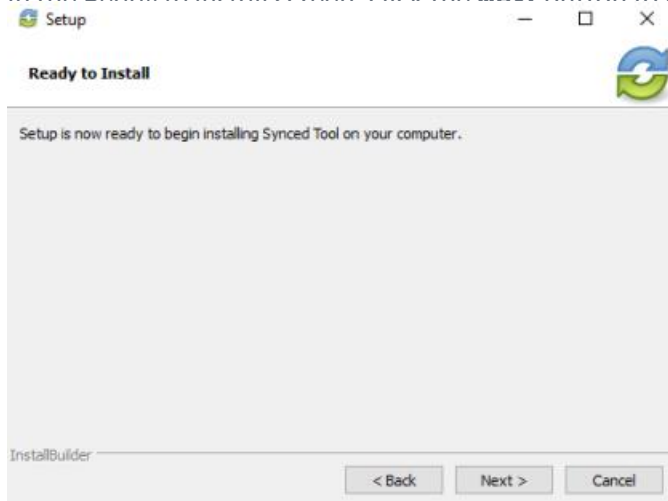
- In the *License Agreement* screen, click the **I accept the agreement** radio button if you accept the license. Then, click the **Next** button to continue.



- In the *Installation Directory* screen, select the location where you want the installation files to reside on your local machine. In most instances, you can accept the default location. Alternatively, manually input a new directory or click the **Folder** icon to select a new directory on your local machine. Click the **Next** button to continue.



- In the *Ready to Install* screen, click the **Next** button to begin the installation process.



- When the *Setup Wizard* completes, you can optionally click the **Create a Desktop Shortcut** checkbox. Then, click the **Finish** button. You must restart your computer to complete the installation process.



## How to Register the Desktop Client

After the desktop client is installed, it must be registered to your user account so that it can recognize the files and folders that belong to you.

To register the desktop client on a Windows or Mac machine:

- After the *Setup Wizard* completes, the *Registration Wizard* will automatically launch. Alternatively, click the icon on your computer's system tray or menu bar, and select **Register**. The *Registration Wizard* displays.

**Note:** On a Windows machine, the icon is located in the lower right-hand corner of the screen; on a Mac machine, the icon is located in the upper right-hand corner of the screen.

- In the *Registration* screen, enter your **login credentials** as provided by your administrator. Click the **Next** button to continue.

Registration

**Welcome to SyncedTool!**

Please enter your login credentials:

EMAIL

PASSWORD

Next ▶

- If Two-Step Authentication has been enabled for your organization or for your user account, you will also be prompted to enter an authentication code at the time of initial registration.

**Two-Step Authentication**

Please supply the Authentication Code provided via email, SMS or app.

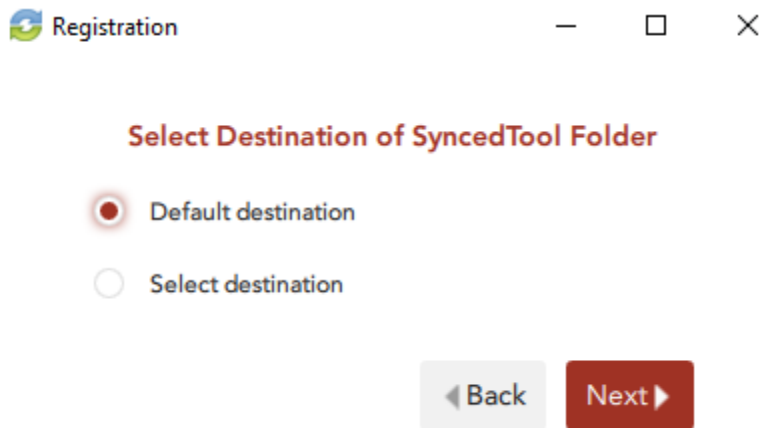
AUTHENTICATION CODE

[Unable to access Authentication Codes?](#)

◀ Back   Next ▶

- After you receive your authentication code, enter the **authentication code** and press the **Next** button.
- In the *Select Destination of Folder* screen, select either a default or customized destination for Synced Folder, where all files, folders, and team shares can be accessed on your local machine. In most instances, you can select **Default**, and you will be able to access Synced Folder in the

following location: C:\Users\[User Name]\Synced Folder.



- a. If you selected the **Select destination** radio button, you will be prompted to choose your preferred folder location. In the *Select Destination* screen, click the **Browse** button to specify another location on your local machine. Click the **Next** button when you are finished.

**Note:** A folder named *Synced Folder* will automatically be created within the location you select. You do not need to manually create a folder titled, *Synced Folder*.

In some cases, if you have previously installed using the same settings, you will receive a warning message indicating that a folder already exists. Click the **Merge** button to merge with the existing folder, and then continue with the Registration Wizard.



4. In the *Selective Sync* screen, click the **Skip and do this later** radio button to sync down all Team Share content and personal folders currently available in the cloud. Or, click the **Select what to sync** radio button to deselect content that you do not currently want on your local machine.



### Choose Folders for Selective Sync

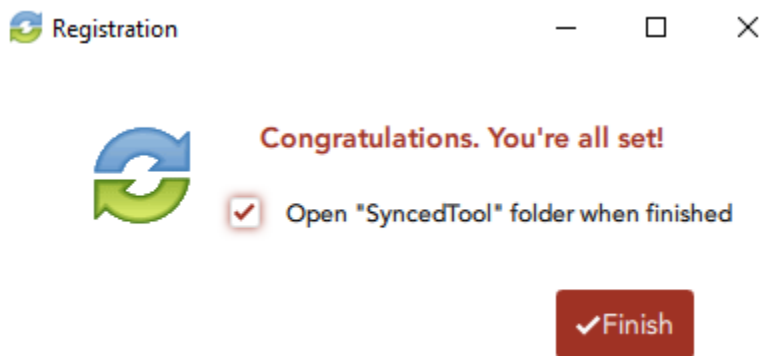
- Select what to sync to this device now
- Skip and do this later

Next ▶

- a. If you select the **Select what to sync** radio button, you will be prompted to deselect the folders and Team Shares that you do not want immediately available on your local machine. Remember that you can change these settings at a later date.



- Click the **Finish** button when the *Registration Wizard* completes.

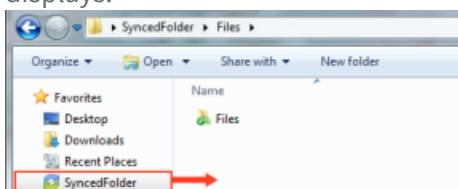


## How to Upload Files in the Desktop Client

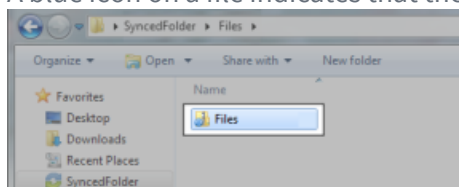
When files and folders are added to the web portal, they automatically propagate down to your local machine; you can then find these files and folders inside your Synced Folder. In the same way, files and folders that are added to Synced Folder will automatically sync to the web portal and any other devices you have connected to your account. You can use the desktop client on both Windows and Mac machines.

To upload files in the desktop client on a Windows or Mac machine:

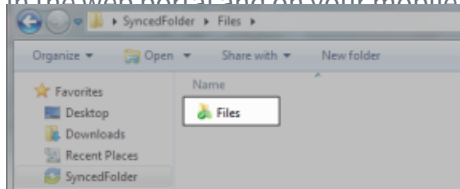
- On your computer (local machine), open Synced Folder in an explorer window. Synced Folder displays.



- Drag files or folders into Synced Folder. Alternatively, you can save files to Synced Folder directly from the application in which you are working (for example, Microsoft Word).
- Use the icons to understand when your files are syncing. For example:
  - A blue icon on a file indicates that the file or folder is currently syncing.



- A green icon means that the file or folder has successfully synchronized, and is available in the web portal and on your mobile devices.



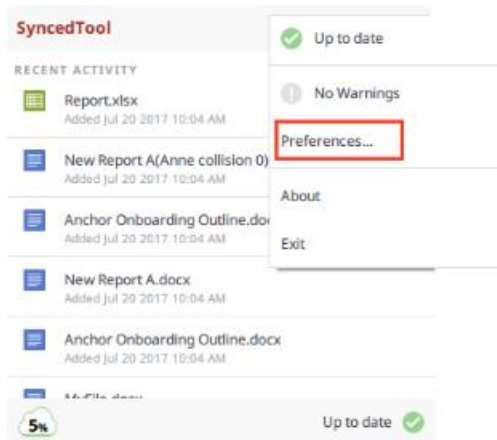
## How to Manage Preferences for the Desktop Client

Using the icon on your computer's system tray, you can manage preferences, pause a sync process, and view warning messages.

### Managing Preferences

To manage your preferences, or to change your settings:

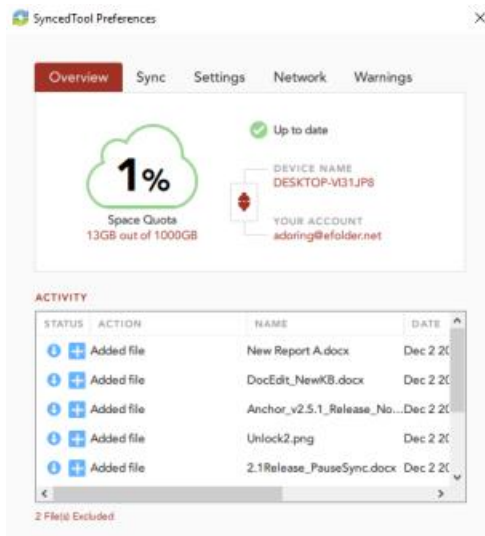
1. Click the **system tray icon**, click the **Manage** button, and then select **Preferences**.



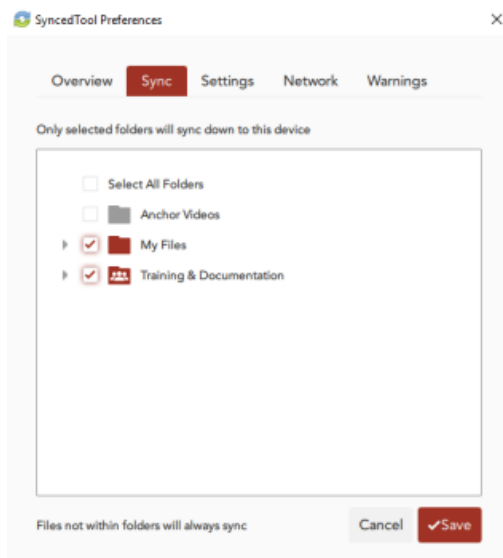
The *Preferences* dialog box displays, showing the *Overview* tab.

2. Use the *Overview* tab to view important information and status updates, including:
  - The current state of the sync process, including whether the files are up to date, pending sync, or currently syncing
  - The total amount of space quota available and the total amount of space used
  - The device name and the device account information
  - The *Unregister* button, which unregisters the desktop client

- The *Activity* area, which lists the status of uploaded and downloaded files, as well as a notification of excluded files



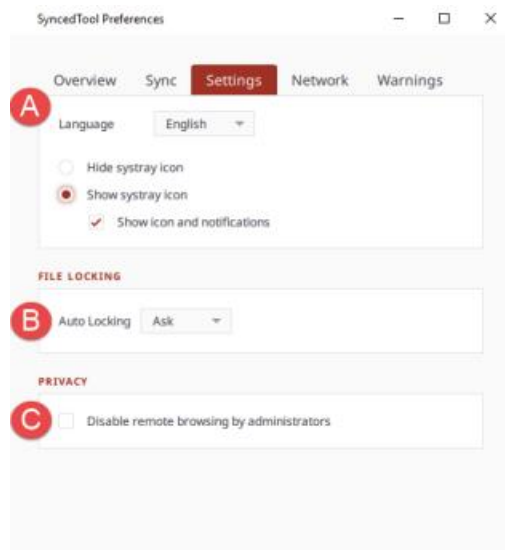
3. Click the **Sync** tab to select and deselect the Team Shares, personal folders, and subfolders that you do not want available on your local machine.



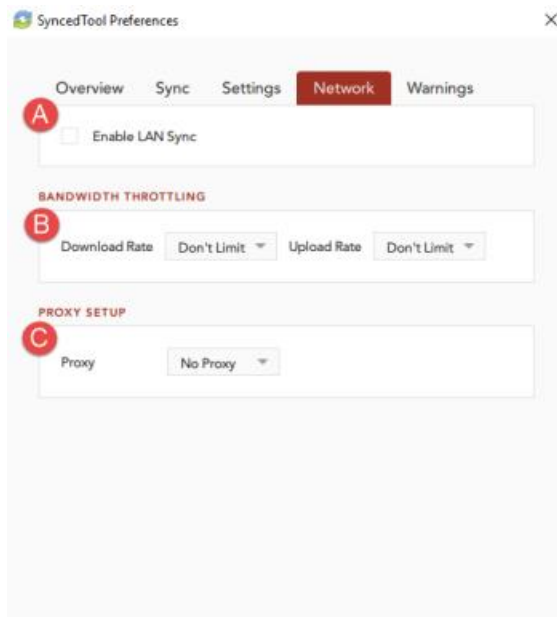
4. Click the **Settings** tab to specify language, locking, and remote browsing settings. For example:
  - Click the **Language** drop-down menu to select your preferred language. You can also choose to show or hide desktop notifications.
  - In the File Locking section, click the **Auto Locking** drop-down menu to set your preferred auto-locking preference. If your administrator has turned on the Auto-Locking feature for

a Team Share, you can decide to automatically lock, never lock, or receive a prompt each time you open a supported Word, PowerPoint, or Excel file in a Team Share.

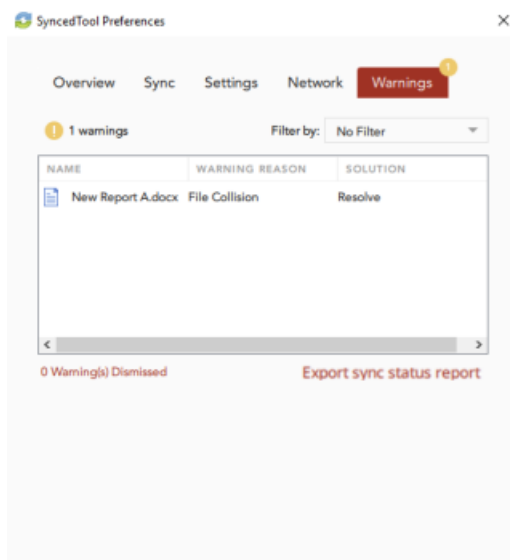
- In the Privacy section, click the **Disable Remote Browsing** checkbox to prevent administrators from remotely browsing the contents of your Synced Folder (for example, to create a backup of your local folders).



5. Click the **Network** tab to manage LAN Sync, bandwidth, and proxy settings. For example:
  - a. If you are working within a Local Area Network (LAN), click the **Enable LAN Sync** checkbox to turn on the LAN Sync feature. LAN Sync refers to a file synchronization approach that accelerates the sync process when a shared file already exists on a LAN.
  - b. Use the **Bandwidth Throttling** section to configure bandwidth settings; you have the option to set a specific limit, or decide not to limit bandwidth. Please note that administrator settings might override your personal settings.
  - c. Click the **Proxies** drop-down to configure proxy settings for your network. You can select from:
    - No proxy
    - Detect Automatically, which auto-detects proxy settings from your system or network
    - Custom, which allows you to apply custom proxy configurations if you are unable to automatically have the system detect your proxy server settings



6. Click the **Warnings** tab to view a list of file sync warnings. While still in this tab, you can also click the **Export Sync Status Report** link to save information about the current sync status to a text file.



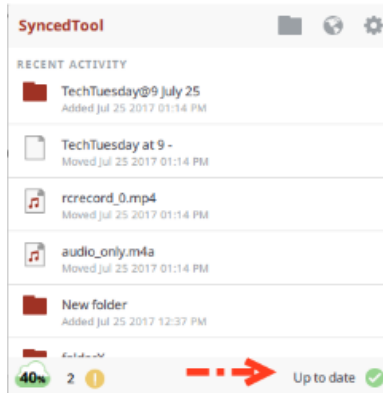
## Pausing a Sync Process

You may find times when you would like to pause the sync process, such as when you are getting on a plane, when you want to conserve bandwidth, or if you would like to work in isolation.

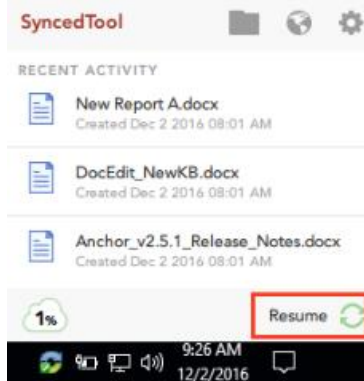
To pause a sync process on a Windows or Mac machine:

1. Click the system tray icon and hover over the **Status** message (for example, *Up to date*).

**Note:** On a Windows machine, the icon is located in the lower right-hand corner of the screen; on a Mac machine, the icon is located in the upper right-hand corner of the screen.



2. When the text changes, click the **Pause** button.
3. To resume the sync process, hover over **Paused** and select **Resume**.

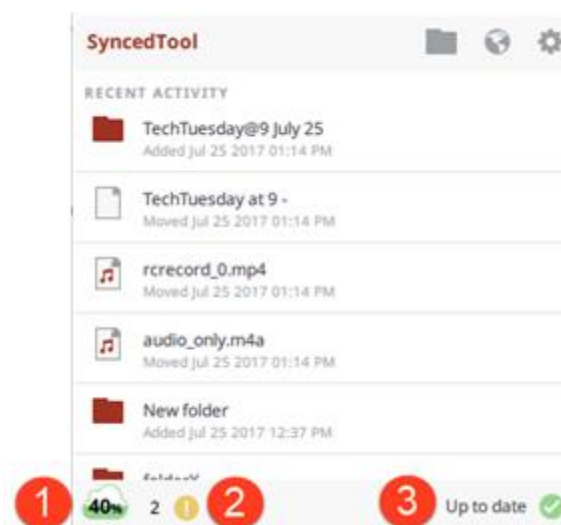


## Viewing Warning Messages

In addition to managing preferences and pausing a sync process, you can view the desktop client warning messages and resolve issues directly from the system tray icon.

1. Click the icon on your computer's system tray or menu bar. The system tray menu displays, allowing you to view and manage warning messages.

- 1 The *Space Quota* indicator message displays the amount of space you are currently utilizing.
- 2 The *Resolve Sync Warnings* indicator activates when a file sync warning—such as a collision or a locked change warning—occurs on your local machine. When this indicator is active, click to resolve the file sync warning. For more information, please reference the *How to Resolve File Sync Warnings* section of the End User Guide
- 3 The *Status* indicator displays the progress of the sync process. This indicator will alert you when the sync process is up to date, syncing, paused, or disconnected. You can also hover over this indicator to enable pause and resume functionality.

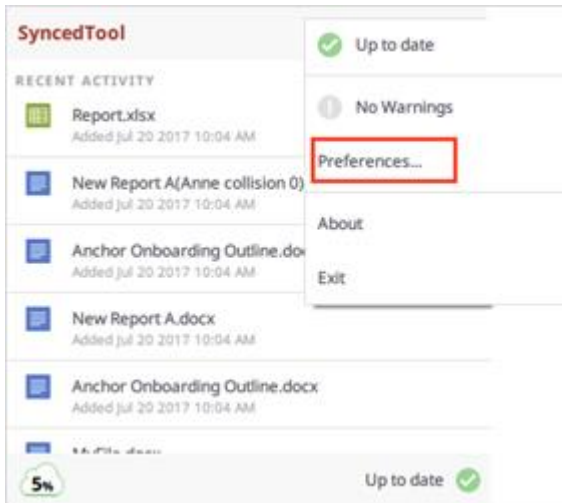


## How to Use the Selective Sync Feature

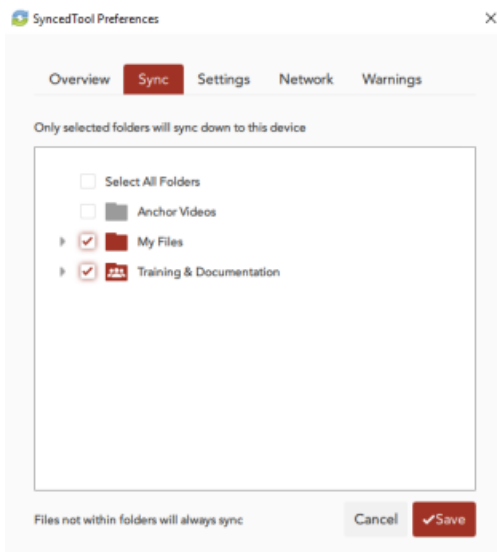
The Selective Sync feature gives end users the ability to select the content that syncs down to their local machines. While all content is still accessible in the web portal, end users can control the amount of data that is downloaded and stored locally, reducing local storage and bandwidth requirements, and increasing options on where and how they access content.

To use the Selective Sync feature:

1. Click the **system tray icon**, click the **Manage** button, and then select **Preferences**.



2. Click the **Sync** tab.
3. In the *Sync* tab, click to expand individual Team Shares to select or deselect Team Share roots or Team Share subfolders. Alternatively, click to expand My Files to select or deselect personal folders.



4. Click the **Save** button when you are finished selecting and deselecting content.

A confirmation dialog box will display, notifying you that only the selected items will sync down to your machine.

5. Click the **Update** button to confirm these changes.

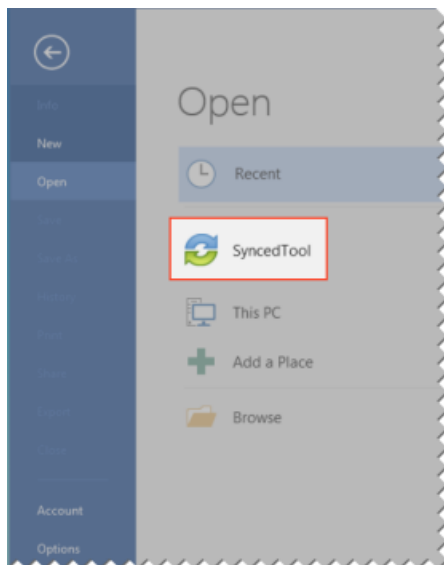
All other folders will still be available in the web portal, and on any other device that can selectively sync content.

## How to Add the Desktop Client as a Storage Location in Microsoft 365

You can add the Desktop Client as a storage location in Microsoft products, making it easy for you to open, edit, and save content stored in the cloud. When you sign in to a Microsoft or Microsoft 365 account, you can:

- Open and save local content stored in the cloud, without navigating away from your local application
- View a list of your recently opened cloud content, allowing you to quickly access your most relevant content supported by the Microsoft application
- Retrieve this storage location on all of your registered machines when you sign in using the same Microsoft or Microsoft 365 account

In this way, you can personalize your Microsoft experience by accessing your synced files from all of your registered machines.

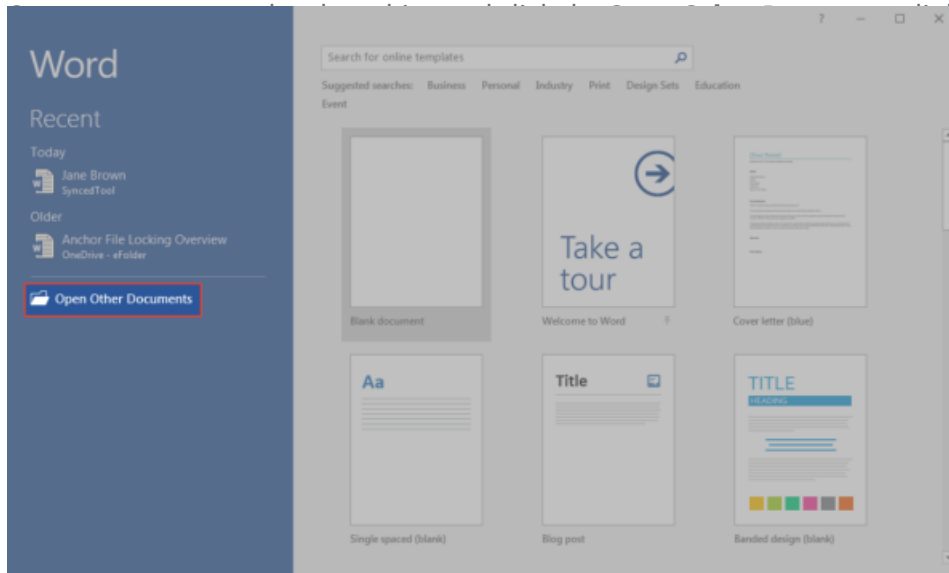


**Note:** This feature is supported for version 2013 and higher.

### Adding The Desktop Client as a Storage Location

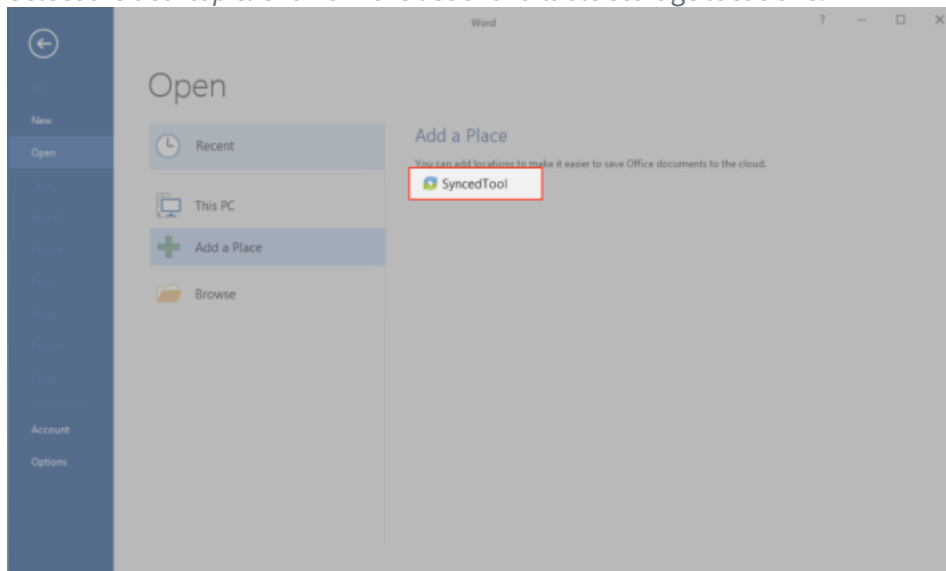
Before you can begin using this feature, you must add the desktop client as a storage location in your local apps.

1.

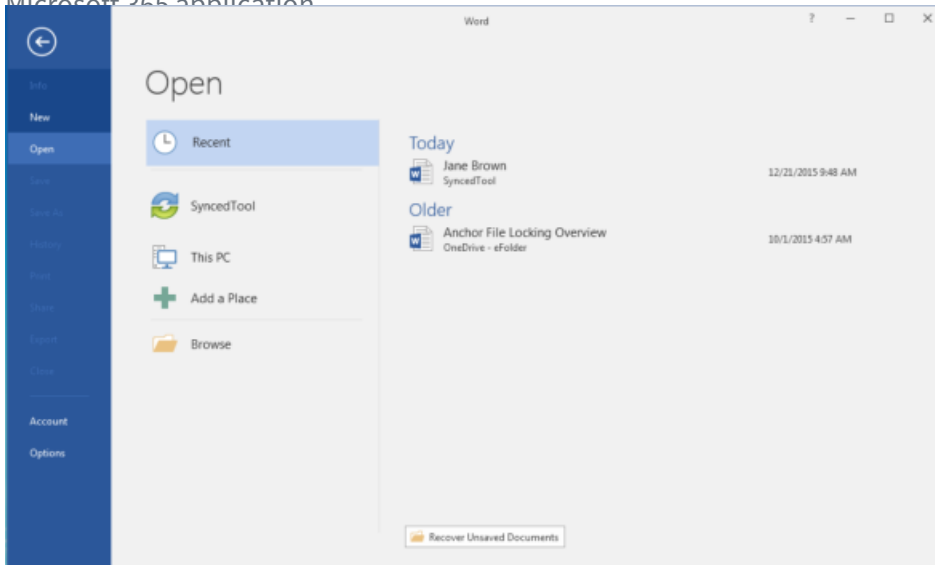


The *Open* section of the backstage area displays, prompting you to open a file.

2. In the backstage area, click **Add a Place**. A list of available storage locations will display on the right-hand side of the backstage area.
3. Select *the desktop client* from the list of available storage locations.



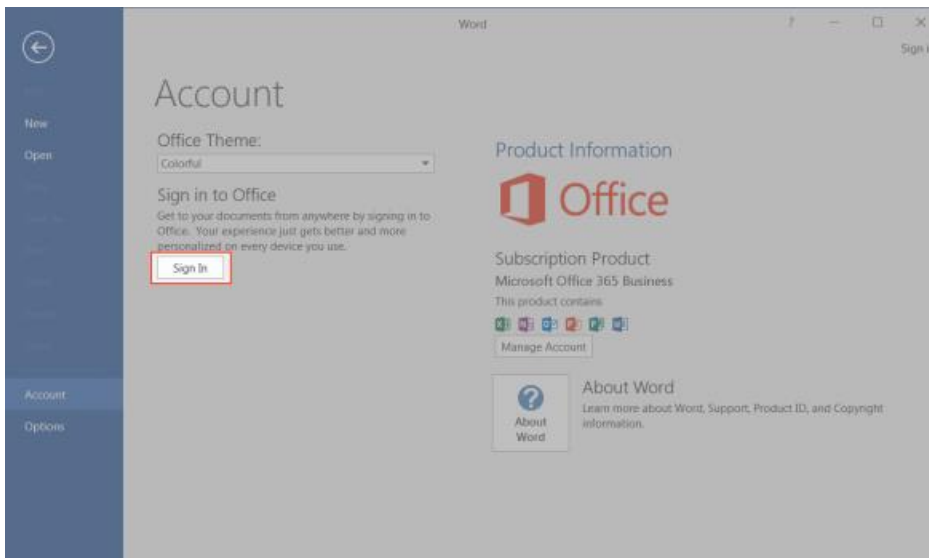
4. You can now open files, edit files, and save new files to the desktop client directly from your Microsoft 365 application.



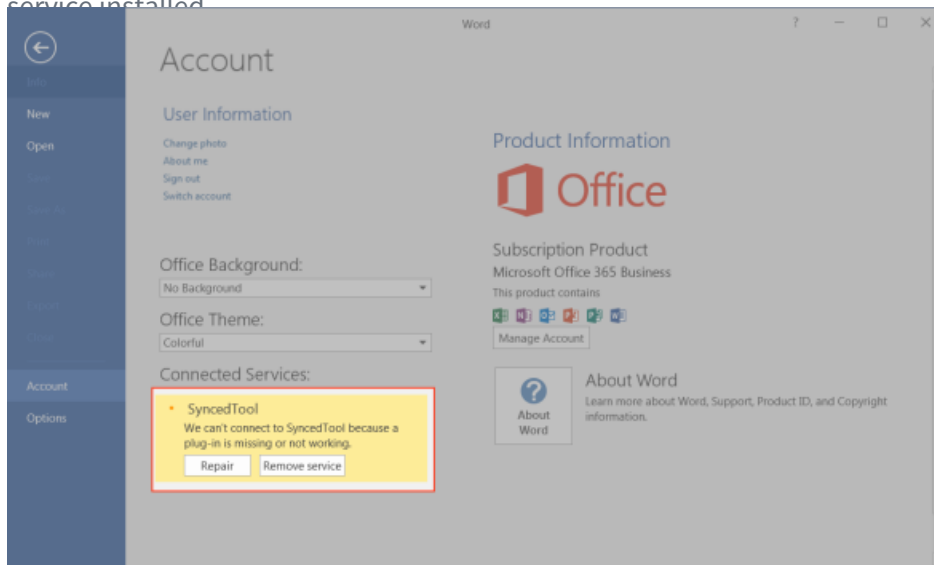
## Accessing Cloud Content from Other Instances of your Apps

If you have Microsoft products installed on more than one computer, but you have not yet installed the desktop client on each machine, your Microsoft app will prompt you to install the desktop client.

1. Open an app on your local machine and click the **Account** link. The *Account* section of the backstage area displays, allowing you to manage your account information.
2. If you have not already signed in to your Microsoft or Microsoft 365 account, click the **Sign In** button.



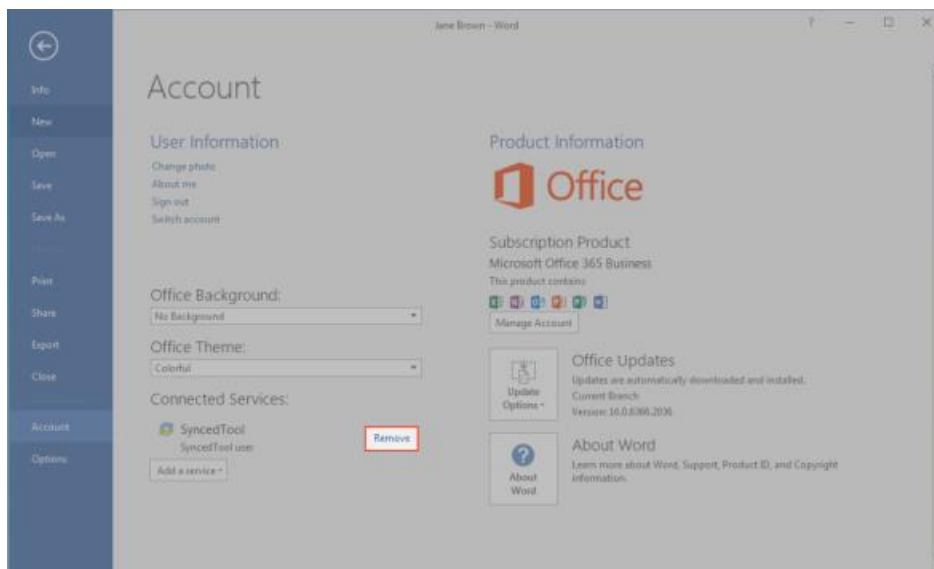
- When you are signed in, you will see a warning message if you do not have the desktop client service installed.



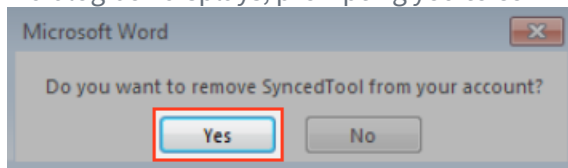
- Click the **Repair** button. A browser window will open, prompting you to download and install the desktop client. When the desktop client is installed, you can access your synced content from within your local apps.

## Removing the Desktop Client as a Storage Location

- Open an app on your local machine and click the **Account** link. The *Account* section of the backstage area displays, prompting you to manage your user information.
- In the backstage area, find the desktop client, and click the **Remove** link.



A dialog box displays, prompting you to confirm your selection.



3. Click **Yes** to confirm your selection. The desktop client will be removed as a storage location.

# Sharing and Collaborating

You can collaborate and share files in many ways.

- A Team Share is a shared folder that can be accessed by groups of users. Team Shares can be configured for users in your organization. When you work within Team Shares, it is important to be careful and courteous when you edit, delete, and move files and folders. Files and folders stored in Team Shares are shared among all other subscribers, so what you do affects your team members.
- A share link allows you to share a direct link to a file or folder, rather than sharing an entire area. Share links can be configured for users in your organization and outside of your organization. You can send a *public share* to recipients inside or outside of your organization; alternatively, you can send a *secure share*, which requires login credentials. If you send a secure share to a recipient outside of your organization, the system will create a guest account for that user.

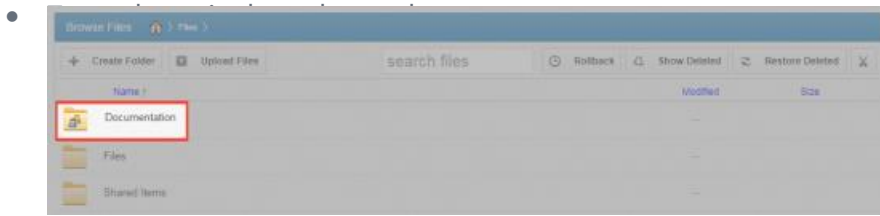
With both Team Shares and share links, you can share files and folders in the web portal, in the desktop client, or mobile apps.

Additionally, with the real-time Collaborative Web Editor, you can edit documents, spreadsheets, and presentations when working in the web portal, without needing to download a separate application or navigate away from the system.

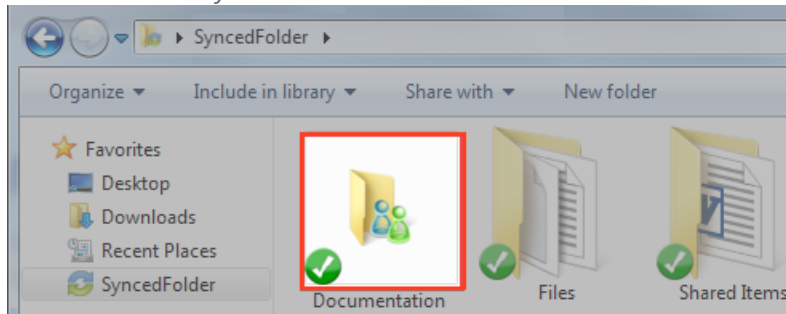
## How to Create a New Team Share

Your administrator might have created Team Shares for you when the system was first configured, but you can also create your own Team Shares. You can create a Team Share if you are collaborating with another person, or group, on a specific set of content. You add files to Team Shares the same way you add files to standard folders. When you or another user in your Team Share adds or edits a file or folder, changes synchronize across all subscribed accounts.

In both the web portal and in Synced Folder, Team Share folders can be recognized by icons with two people on it.



- Team shares in Synced Folder:



When you work within Team Shares, it is important to be careful and courteous when you edit, delete, and move files and folders. Files and folders stored in Team Shares are shared among all other subscribers, so what you do affects your team members.

You might find it useful to follow certain best practices to ensure that shared content is protected and well managed. These best practices include:

- Locking files and folders before you begin making changes—when you lock a file and folder, you are essentially setting it as read-only for others subscribed to the Team Share, giving you exclusive editing rights while you make changes. For more information, please reference the *Locking Files and Folders* section of the Guide.
- Monitoring activity using the File Report, the Activity Log, and the Daily Email Digest—To see a summary of changes made to files and folders within a specific Team Share, you can optionally track and monitor activity in the web portal using the File Report and the Activity log. For more information, please reference the *File Report and Activity Log* section of the Guide. To create a Daily Email Digest that summarizes activity for a particular Team Share, please reference the *How to Manage Shared Items* section of the Guide.

## Team Share Permissions

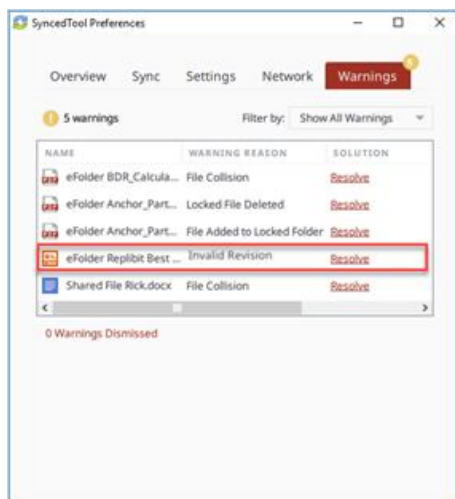
When administrators create Team Shares, they assign permission roles, which define how each subscriber can interact with content in the Team Share. For example:

- The Co-Owner has total control over content.

- The Collaborator (default role) has the ability to seamlessly work with others by creating share links and modifying all content locally and on the web.
- The Editor is similar to the Collaborator, but without the ability to generate share links.
- The Web Editor is similar to the Editor, but without the ability to download or sync content locally. Web Editors can edit the content within the Collaborative Web Editor only.
- The Viewer is a restricted role, only giving users the ability to view content.
- The Previewer is a restricted role, only giving users the ability to preview content in the web portal.
- The Uploader is a restricted role, only giving users the ability to view folder structures (not files) and upload files and folders on the web.

If you perform an unauthorized action in the web portal, you will receive an error message.

If you perform an unauthorized action from the desktop client, you will receive a file sync warning.



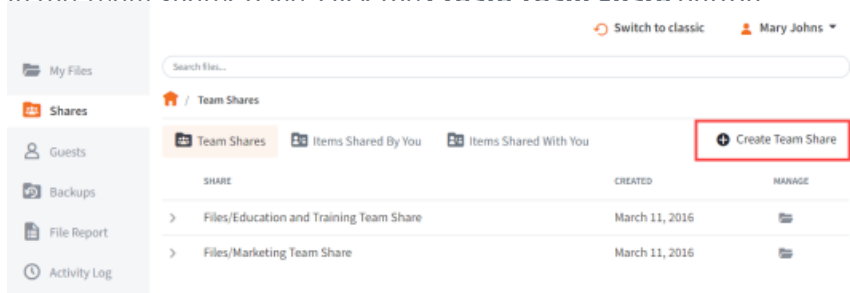
Please contact your administrator if you have questions about Team Share permission roles assigned to you.

## Instructions

In many instances, an administrator will create a Team Share for you. As an end user, you can also create your own Team Shares. To create a new Team Share:

1. In the web portal, click the **Shares** tab. The *Team Shares* page displays.

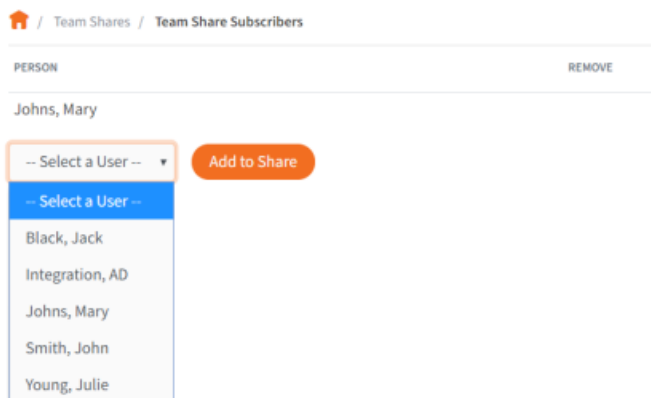
- In the *Team Shares* page, click the **Create Team Share** button.



The *Create Team Share* page displays.

- In the *Create Team Share* page, type a descriptive **name** for the Team Share in the *Team Share Name* field.

- Click the **Create** button when you are finished. You will be redirected to the *Team Share Subscribers* page.
- In the *Team Share Subscribers* page, select a **name** from the *Select a User* drop-down menu, and click the **Add to Share** button.



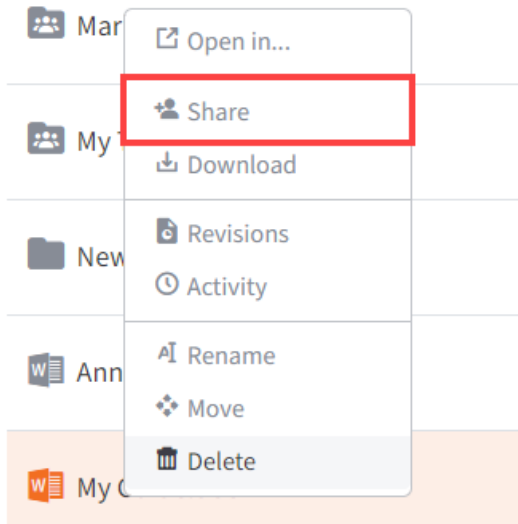
The selected user will now be added to the Team Share.

## How to Send Share Links to Files

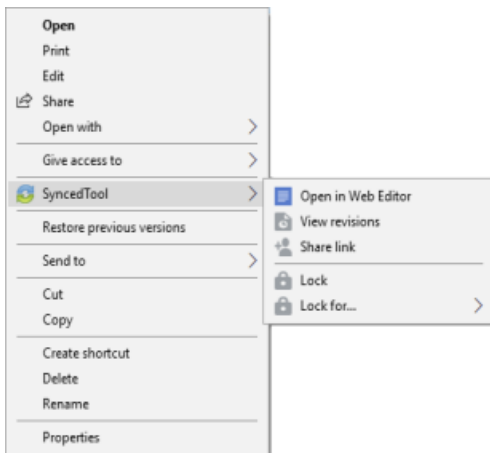
Share links to files can be created within the web portal, from the desktop client, or from a mobile device.

To send a share link to a file:

1. Right-click on the file and select **Share**.



Or, if you are working within the desktop client, right-click on the file, point to the SyncedTool menu, and select **Share link**.



The *Share Access* dialog box displays.

2. In the *Share Access* dialog box, configure settings for sharing the link, including:
  - The *Secure Share* option, which requires each recipient to log in with his or her unique credentials.
  - The *Public Share* option, which sends a publicly available share link to the file. If you create a public share link, you can also select the **Allow anonymous users to edit files** checkbox to allow users to edit the file online using the Collaborative Web Editor.
  - The *Share Options* settings, which allow you to:
    - Select whether the share link will expire after a certain date
    - Set a limit for the total number of times the file can be downloaded
    - Turn on email notifications for when the share is downloaded
  - The *Share With* settings, which allow you to specify share recipients and set permissions for each of these users. This section is only required if you are sending a secure share link. Alternatively, for public share links, you can optionally copy the share link and send it to desired collaborators through third-party communication tools.
  - The *Permissions* settings, which let you set *Can Modify* permissions, allowing the specified user to edit the file using the Collaborative Web Editor.
3. Click the **Share** button save your changes. You will be redirected to a confirmation page.

4. Click the **Delete** button to cancel your configurations and delete the share link.

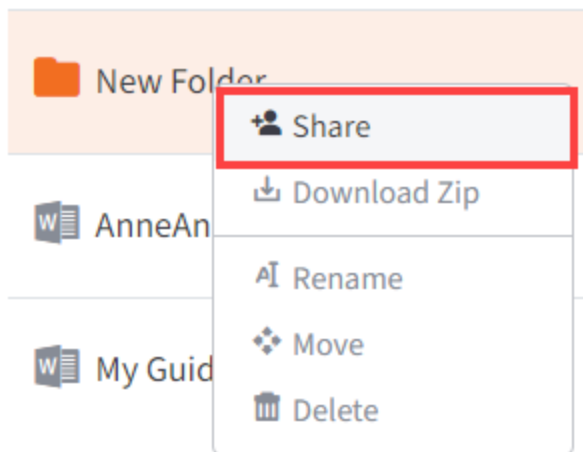
**Note:** If you reopen and edit the share link, you will see a *Cancel* button, which will close the dialog box, but will not delete the share link.

## How to Send Share Links to Folders

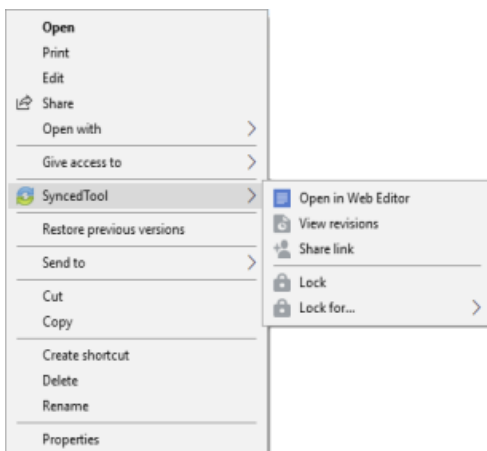
Share links to folders can be created within the web portal, from the desktop client, or from a mobile device.

To send a share link to a folder:

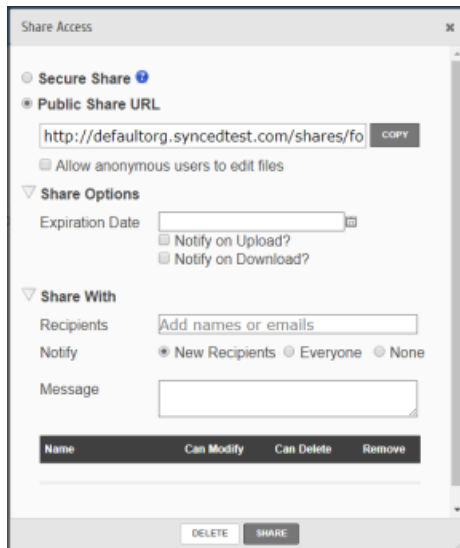
1. In the web portal, right-click folder and select **Share**.



Or, if you are working within the desktop client, right-click the folder, point to the SyncedTool menu, and select **Share link**.



The *Share Access* dialog box displays.



2. In the *Share Access* dialog box, configure settings for sharing the link, including:
  - The *Secure Share* option, which requires each recipient to log in with his or her unique credentials.
  - The *Public Share* option, which sends a publicly available share link to the folder. If you create a public share link, you can also select the **Allow anonymous users to edit files** checkbox to allow users to edit files within the folder using the Collaborative Web Editor.
  - The *Share Options* settings, which allow you to:
    - Select whether the share link will expire after a certain date
    - Set a limit for the total number of times items in the folder can be downloaded
    - Turn on email notifications for when the share is downloaded
  - The *Share With* settings, which allow you to specify share recipients and set permissions for each of these users. This section is only required if you are sending a secure share link. Alternatively, for public share links, you can optionally copy the share link and send it to desired collaborators through third-party communication tools.
  - The *Permissions* settings, which let you set the following permissions:
    - *Can Modify* permissions allow the specified user to edit files within the folder using the Collaborative Web Editor. *Can Modify* also lets users upload files into the folder.
    - *Can Delete* permissions allow the user to delete files within the shared folder.

3. Click the **Share** button save your changes. You will be redirected to a confirmation page.
4. Click the **Delete** button to cancel your configurations and delete the share link.

**Note:** If you reopen and edit the share link, you will see a *Cancel* button, which will close the dialog box, but will not delete the share link.

## How to Manage Guest Accounts

Guests are special accounts that are created for individuals outside of your organization. You can manually create a guest account and give that guest access to files and folders; you can even give a guest access to an entire folder so that the guest can upload and manage content within the system.

Alternatively, if you send a secure share invitation to a person outside of your organization, you are automatically creating a guest within the system. You can manage your guest accounts using the *Guests* tab inside the web portal. For example, you might want to remove guests who no longer need access to content that you have shared.

Guest users can also manage their own user settings—including their name, email address, and password—and can even delete their own account.

Specifically, Guest accounts *can*:

- Access a shared file or folder through the web portal
- Manage their account information and change their password

Guest accounts *cannot*:

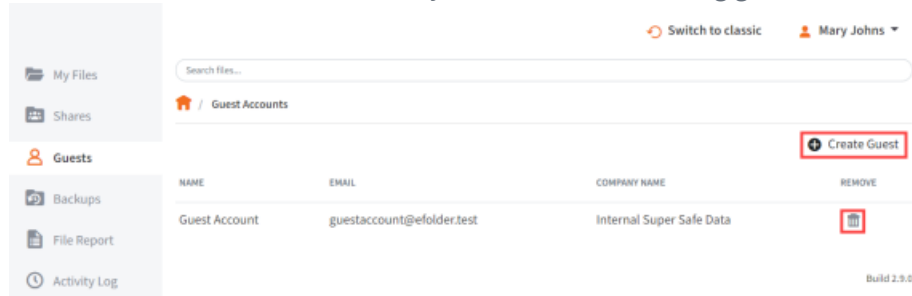
- Utilize the desktop client, WebDAV, or mobile apps
- Subscribe to Team Shares

**Best Practice:** If you will be collaborating with a guest account on a regular basis, you might consider sharing an entire folder with the guest account. When you create a secure share to a folder, you can invite a guest account and decide whether or not to give that guest account permission to upload or delete content from that shared folder. You can also choose to be notified when the guest user uploads or downloads content. In this way, the shared folder becomes a collaborative space where you can exchange and review content.

To manage guest accounts:

1. In the web portal, click the **Guests** tab. The *Guests* page displays, listing all of your existing guests.
2. Use the tools in the *Guests* tab to manage guests.
  - The *Create Guest* button, which allows you to manually add a new guest. You can configure the guest's name, email address, password, and even decide if and when the password should expire.

- The *Remove* button, which allows you to delete an existing guest.

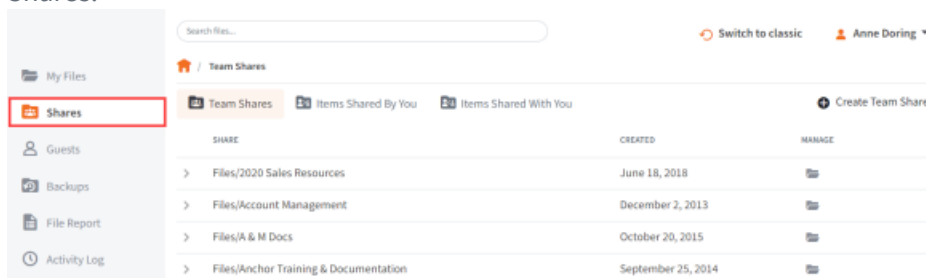


## How to Manage Shared Items

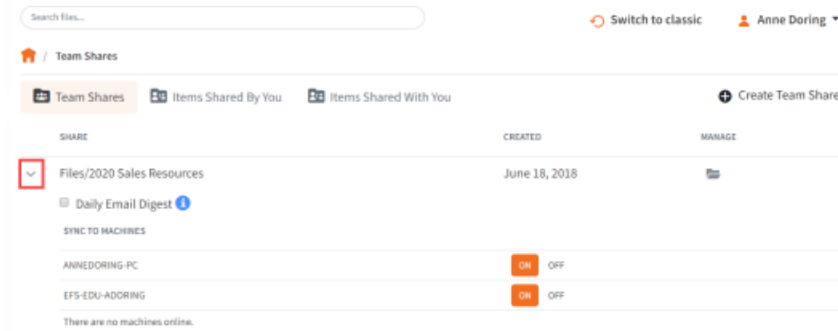
You might find it useful to keep track of items in Team Shares, as well as items you have shared with third parties. Using the **Shares** tab in the web portal, you can generate and view reports that allow you to manage these shared items. You can also remove a share link if required.

To track shared items:

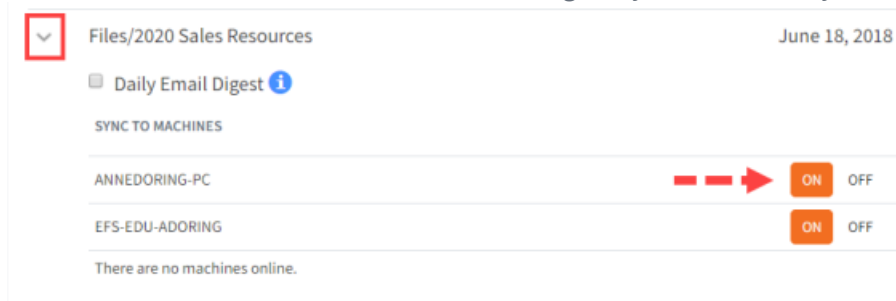
1. In the web portal dashboard, click the **Shares** tab to manage your shares.
2. Click the **Team Shares** button to access controls that allow you to create, view and edit Team Shares.



- a. Optionally, click the **arrow** to expand a Team Share.



- b. Click the **On** button to receive a *Daily Digest* email for the selected Team Share. A Daily Digest email will outline detailed information about events that occurred within the Team Share. You will receive a daily email until you turn off the *Daily Digest* option.
- c. You can also turn on or off the syncing of Team Share content down to your local machine. This functionality is useful if a Team Share contains large files (such as video files) and you would rather only access the content when necessary from the web. Click the **Off** button to turn off the syncing of content to your local machine. Alternatively, click the **On** button to ensure that all content gets synchronized to your local machine.



3. Click the **Items Shared By You** button to track how many times an item you shared has been viewed, downloaded, and whether or not it is set to expire on a certain date.

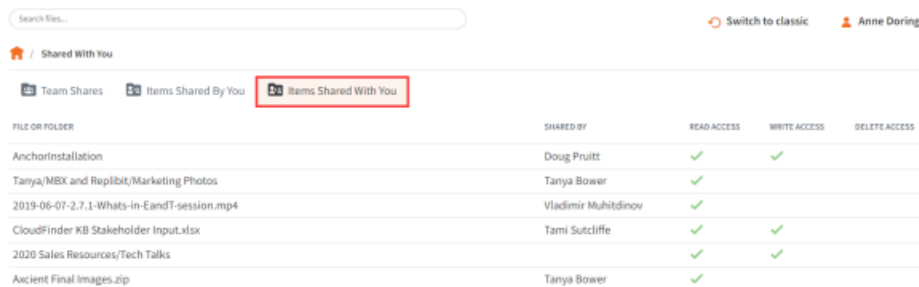
FILE OR FOLDER	# VIEWS	# DOWNLOADS	EXPIRES	MANAGE
Product Certification/ProductTraining_Analysis.pptx	0	0 / Unlimited	None	🔗 ⚙️
Anchor Training & Documentation/Anchor Account Change of Ownership Permission Form.docx	0	0 / Unlimited	None	🔗 ⚙️
Product Certification/CloudFinder	5	0	None	🔗 ⚙️
Education and Training/Private/Resources for Design_Develop/Standards & Guidelines/Dictionary Word Usage	0	0	None	🔗 ⚙️

- a. Find a previously configured share link and click the **arrow** to expand and view settings.
- b. Click the **Manage Share Access and Settings** button to reconfigure settings configured in the *Share Access* dialog box.

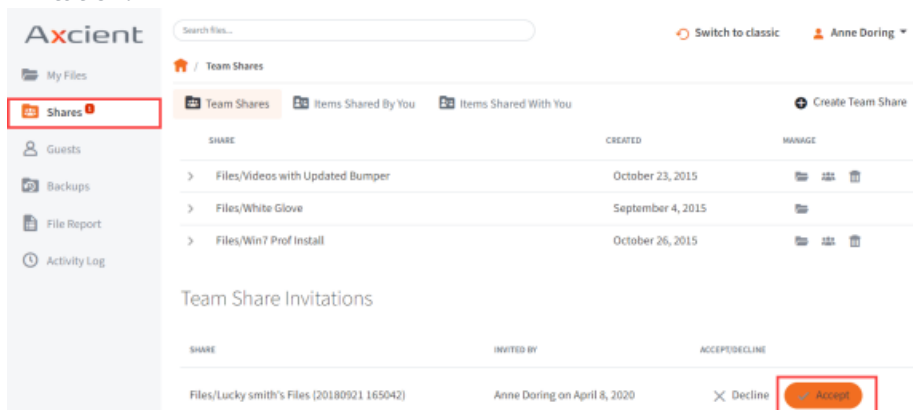
- c. Click the **Deactivate Share** button to delete the share link and remove all access.
- d. Alternatively, click the **Delete** button to remove a share link for one or more share recipient.



- 4. Click the **Items Shared With You** button to view files that were shared with you by others in your organization, as well as information about who shared the file and what access rights you were given (including read, write, and delete).



- 5. Finally, in some instances, you might be invited to join a Team Share that is outside of your standard work organization. When this happens, you will be alerted through email and by a notification in the *Shares* tab of the web portal. Use the *Shares* tab to accept or decline this invitation.



## How to Edit Files in the Web Portal Using the Collaborative Web Editor

With the real-time Collaborative Web Editor, you can edit documents, spreadsheets, and presentations when working in the web portal, without needing to download a separate application or navigate away from the system. Additionally, the Collaborative Web Editor allows you to make these changes simultaneously with multiple coauthors, and lets you see each edit in real time.

Advanced functionality includes:

- Access a wide range of formatting tools to help you update fonts, paragraph formats, charts, tables, images, style types, and more
- Edit simultaneously with coauthors and view their changes in real time
- Send and receive instant chat messages
- Add, view, and manage changes and comments

## Revisions

- Files automatically save ten seconds after the latest edit.
- For security purposes, an editing session will end after one hour of inactivity.
- Editing a file within the Collaborative Web Editor will generate a revision in Anchor.

## Anonymous Editing Permissions

When sharing a file, users can grant anonymous editing permissions on public share links. Anonymous editing permissions allow anyone with access to the share link to edit the file using the Collaborative Web Editor.

## Notifications and File Locking

- In the Web Portal, a file that is being actively edited from within the Collaborative Web Editor will be marked with a Web Edit icon. Team Share subscribers will still be able to launch this file from the web portal using the Collaborative Web Editor.



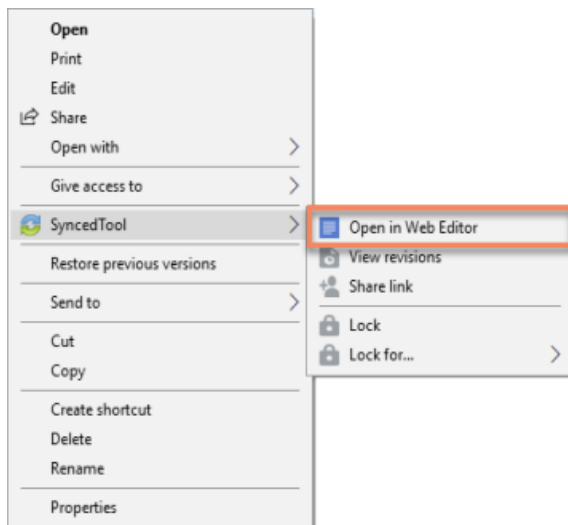
- In the desktop client, a file that is being actively edited from within the Collaborative Web Editor will be automatically protected by the File and Folder Locking feature and marked with a lock icon. Team Share subscribers will not be able to edit this file using applications on their local machines.



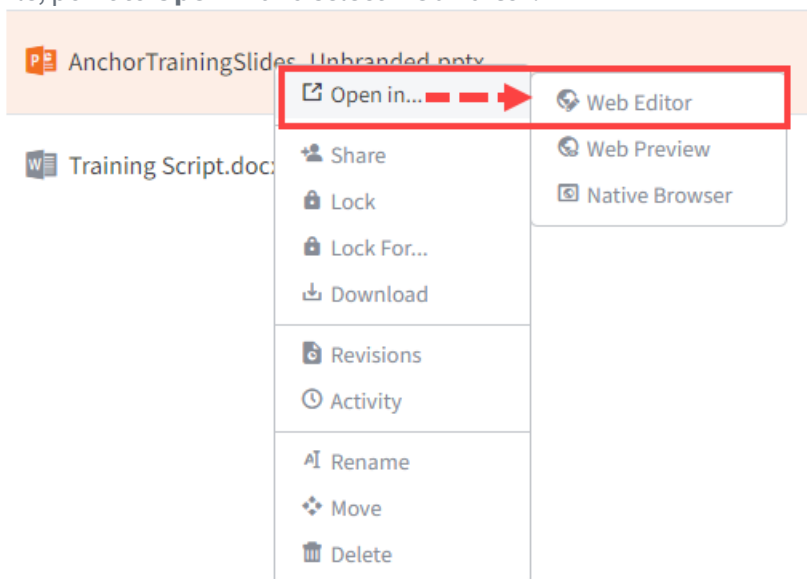
## Launching the Collaborative Web Editor

To use the Collaborative Web Editor:

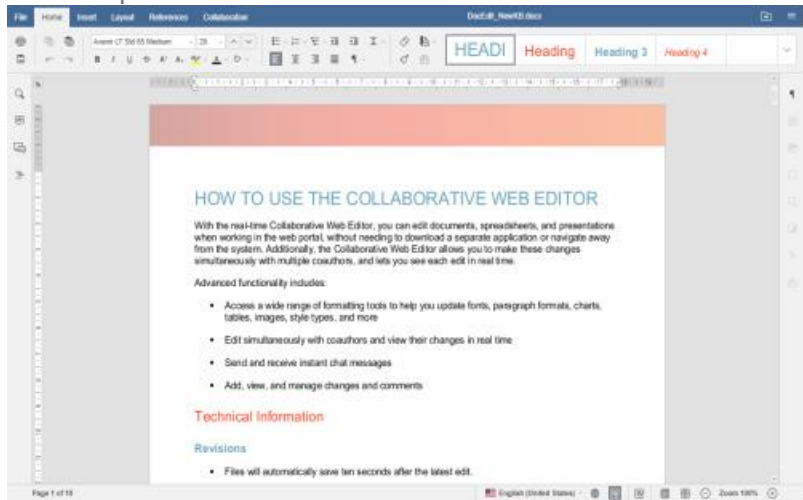
1. If you are working from the desktop client, right-click a supported file, point to the context menu, and select **Open in Web Editor**.



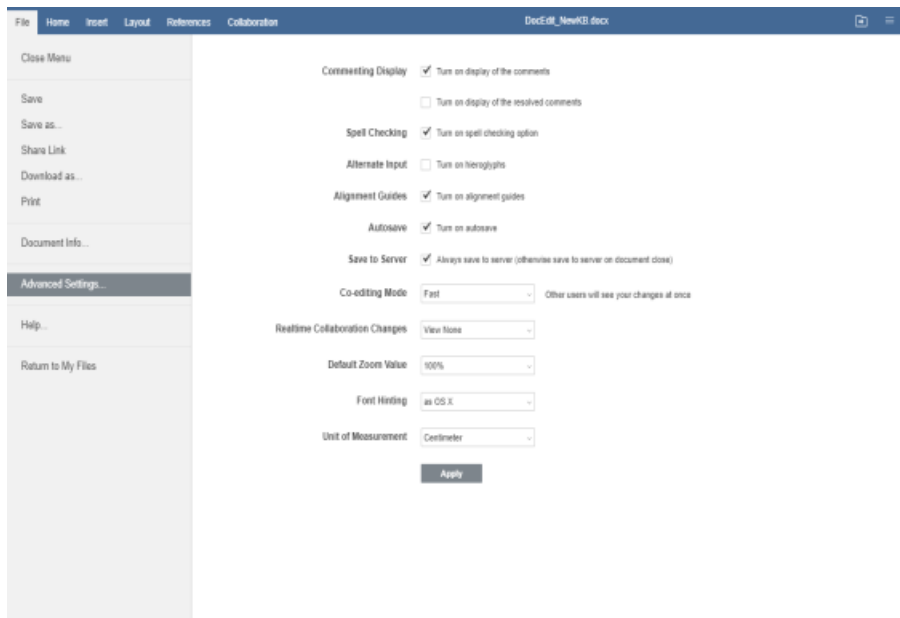
2. Alternatively, if you are working in the web portal, navigate to a supported file, right-click the file, point to **Open in** and select **Web Editor**.



The file opens in a new tab.



3. To configure advanced settings, click the **File** tab, and then click the **Advanced Settings** link.



Use the *Advanced Settings* section to turn on and off features, such as commenting, spell check, auto-save, and so forth. You can also choose to view or disable real-time collaboration changes.

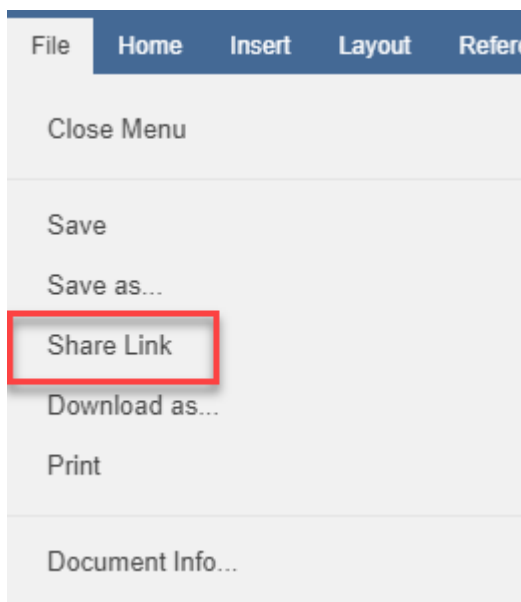
4. While still in the Files section of the tool, you can:
  - a. Click **Save** to save the file.
  - b. Click **Save as** to save the file with a new name. You will also be given the option to save the file to a new file format or a new location (within the same root folder).
  - c. Click **Share Link** to generate a share link for a standard user or guest user. The recipient will be given privileges to co-edit the document using the Collaborative Web Editor.

- d. Click **Download as** to download the file to your local machine. You will be presented with the option to download the file in your preferred file format.
- e. Click **Print** to print the document using your preferred printing device.
- f. Click **Help** to view a comprehensive listing of all available functionality.

## Inviting Coauthors to Collaborate

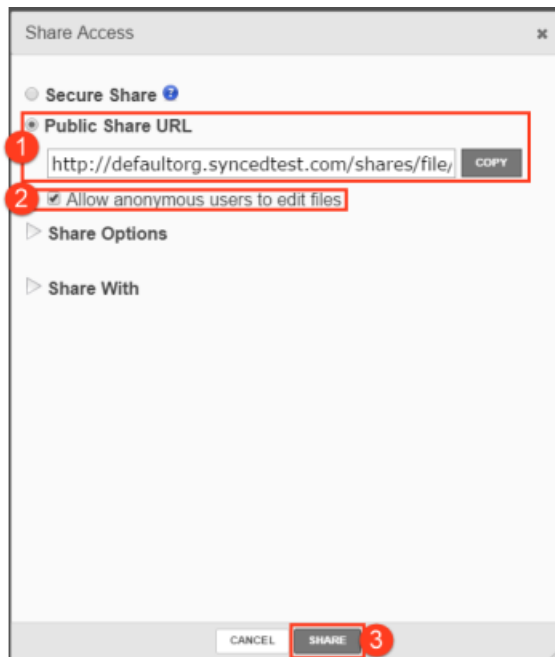
To collaborate on a single file in real time, you can create a share link from the web portal or your desktop client. You can also invite users to collaborate from within the Collaborative Web Editor.

1. Click the **File** tab and select **Share Link**.



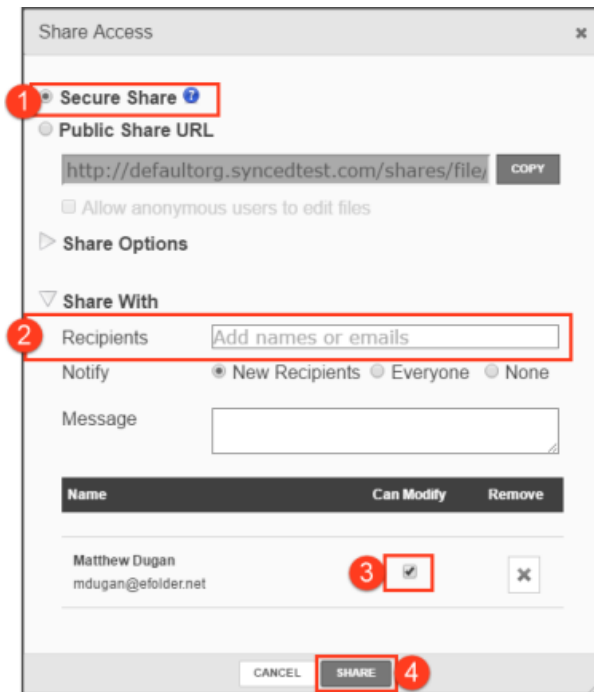
The *Share Access* dialog box displays.

2. You can create a public share link to allow anonymous users to edit the file:
  - a. Select the **Public Share URL** radio button, and then click the **Copy** button to ensure that you capture the URL of the file.
  - b. Select the **Allow anonymous users to edit files** checkbox to let anyone who launches the share link to edit the file using the Collaborative Web Editor.
  - c. Click the **Share** button to save your settings. You will then be able to paste the share link in an email, chat, or other messaging device.

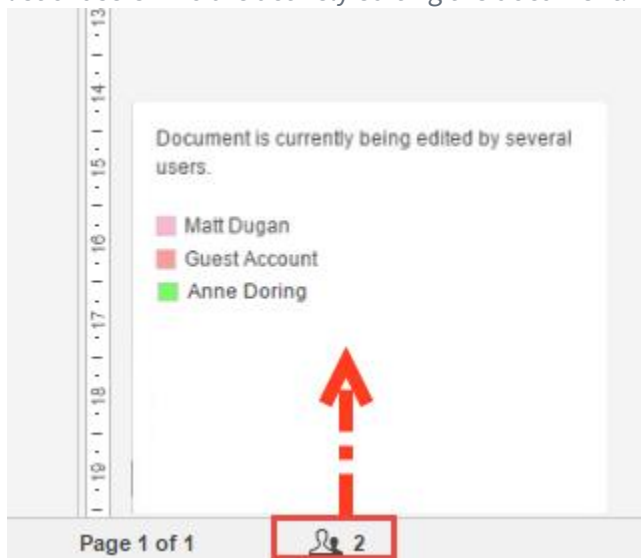


3. Alternatively, you can create a secure share link to require recipients to log in:
  - a. Select the **Secure Share** radio button.
  - b. In the *Recipients* field, enter the name of the coauthor. The name of this new user will display in the lower portion of the screen.
  - c. Ensure the *Can Modify* checkbox is selected. The *Can Modify* permission allows this user to edit the file.

- d. Click the **Share** button to send the share invitation to the recipient(s).



4. To view a list of coauthors, click the **View Users** button. A pop-up window displays, showing a list of users who are actively editing the document.



When these users make changes, their edits are visible immediately and are marked with a

vertical bar.



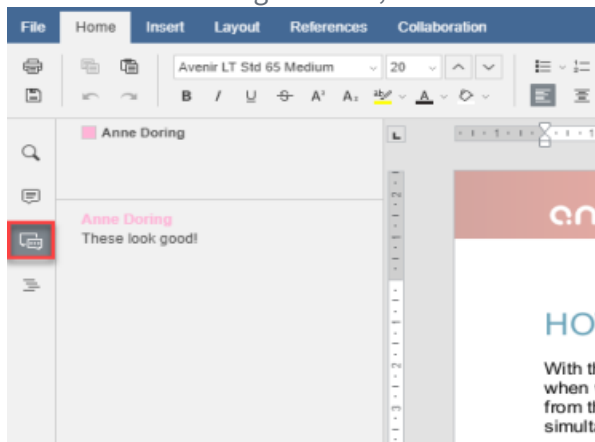
5. Hover over the vertical bar to view editing details.



## Chatting with Coauthors

When you are collaborating on a document in real time, you can use the Chat feature to communicate and share ideas with coauthors.

1. In the left-hand navigation bar, click the **Chat** button to reveal the chat window.



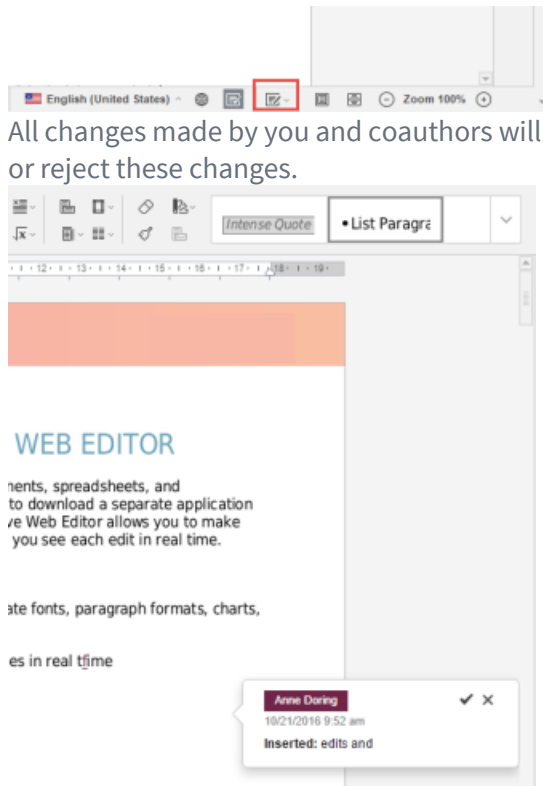
2. Enter your message in the *Chat* dialog box and click the **Send** button. A visual overlay displays over the recipient's Chat button, indicating that a new message is available to view.

## Editing with Coauthors

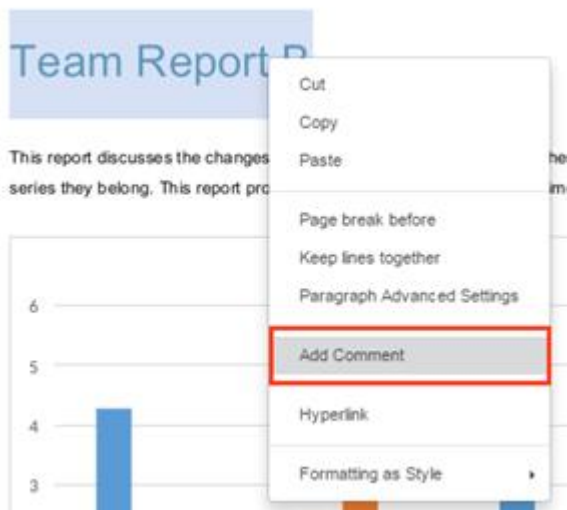
The Collaborative Web Editor allows you to edit using its Track Changes feature. You can also embed comments into files to aid in the collaboration process.

**Note:** If the file is later downloaded and opened on a local machine, these edits and comments will remain, and will display in all applications that support Track Changes and commenting (for example, Microsoft 365 products).

1. To turn on Track Changes, click the **Track Changes** button found at the bottom right-hand corner of the screen.



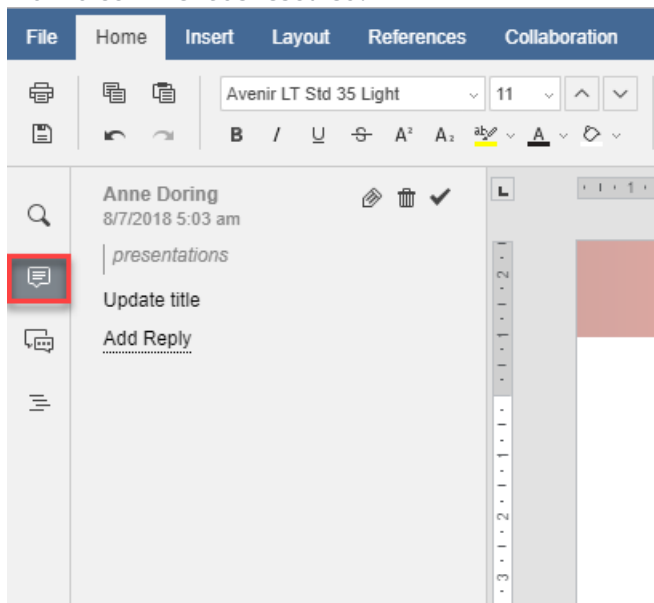
2. To add a comment, highlight the appropriate portion of the file, right-click the highlighted content, and then select **Add Comment**.



A pop-up bubble displays, allowing you to type a comment.



- To view all comments in the document, or to respond to an existing comment, click the **Comments** button in the left-hand navigation bar. You can use the toolbar to edit, delete, or mark a comment as resolved.



## How to Edit Files in the Web Portal Using Microsoft 365 Apps

If your organization has access to a commercial Microsoft 365 subscription, you can edit files in the web portal using your Microsoft 365 apps. During the editing session, files are automatically saved, and all versions are tracked.

**Note:** Your administrator must turn on this feature before it can be used.

Advanced functionality includes:

- Quickly view or edit files directly from the web portal, without needing to download files or use local applications.
- Access a wide range of formatting tools to manage fonts, images, charts, styles, and more.
- Edit and collaborate using the Track Changes and Commenting features.
- Track file changes and revisions automatically through the auto-save feature.
- Collaborate with co-authors in real time.

## Supported File Formats

The following file formats can be edited using Microsoft 365 apps:

- Microsoft Word (.docx)
- Microsoft PowerPoint (.pptx)
- Microsoft Excel (.xlsx)

## Notifications and File Locking

- In the Web Portal, a file that is being actively edited within a Microsoft 365 app will be marked with a Web Edit icon. Team Share subscribers will still be able to launch this file from the web portal.



- In the desktop client, a file that is being actively edited will be automatically protected by the File and Folder Locking feature and marked with a lock icon. Team Share subscribers will *not* be able to edit this file using applications on their local machines.

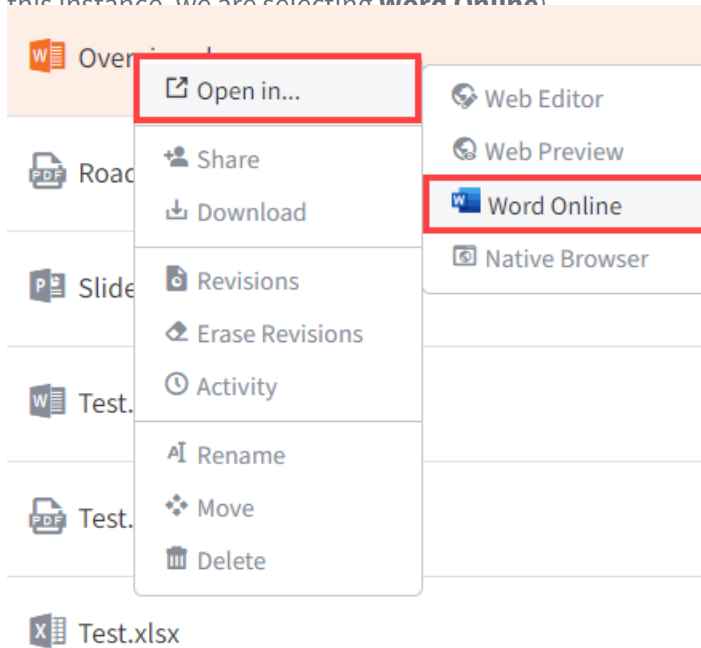


## Launching a Microsoft 365 App

To view or edit files using Microsoft 365 apps:

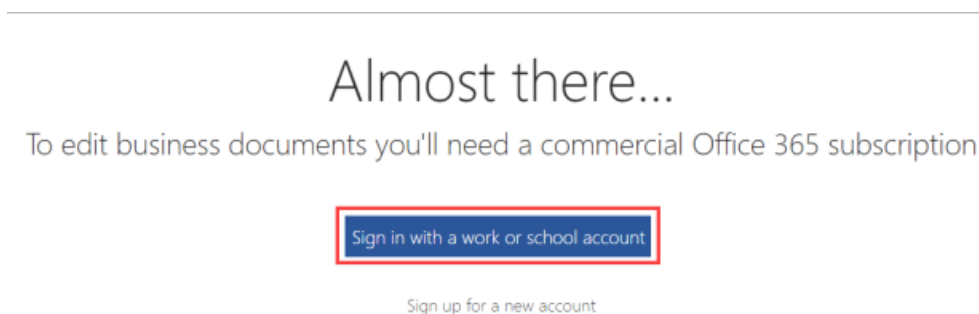
1. In the *Files* tab of the web portal, navigate to the file that you want to view.

2. Right-click a supported file, point to **Open in**, and select the appropriate Microsoft 365 app (in this instance, we are selecting **Word Online**)

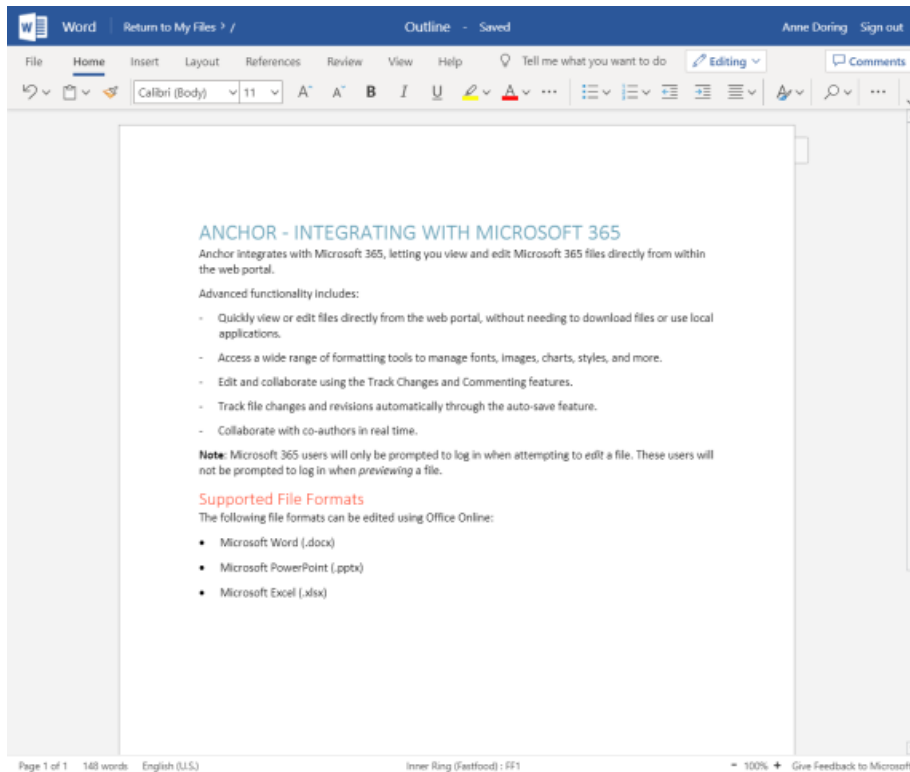


The file automatically locks and will be marked with an Editing icon in the web portal.

3. If you are not logged in to Microsoft 365, you will be prompted to sign in. Click the **Sign in with a work or school account** button to continue.



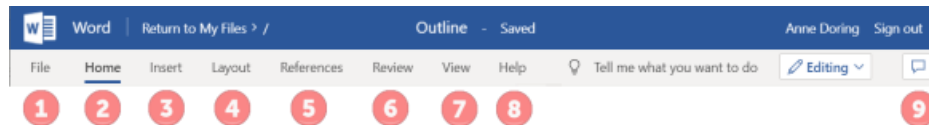
After you are authenticated, the file opens in the Microsoft 365 app.



**Note:** Depending on administrative settings, you might only have the option to *view* files. Contact your administrator for more information.

4. When working in your Microsoft 365 apps, you can access advanced functionality, including:
  1. Click the **File** tab to rename your file. If you are working in the Excel app, you will also have access to the *Save As* feature, which allows you to save to a different file. This new file will be saved to your root folder.
  2. Click the **Home** tab to manage your clipboard, change fonts, control paragraph settings, and apply styles as defined in your file. You can also access the Find and Replace feature if needed.
  3. Click the **Insert** tab to add page breaks, tables, pictures, links, and comments; you can also control headers, footers, and footnotes.
  4. Click the **Layout** tab to manage margins and page formatting options.
  5. Click the **References** tab to insert a Table of Contents or other reference tools.

6. Click the **Review** tab to manage the Spell Check feature, add comments, and show editing activity.
7. Click the **View** tab to set preferred viewing settings. For example, you can control the display of the navigation page, adjust zoom settings, and so forth.
8. Click the **Help** tab to access the Microsoft Help file.
9. Click the **Comments** button to expand or collapse the Comments panel.



5. Click the **Return to My Files** link when you are finished. You can also close your browser tab to end the editing session. All changes will be automatically saved.

**Note:** The Sign Out link currently signs you out of the web portal; it does not sign you out of Microsoft 365. This functionality will change in future releases.

# Locking Files and Folders

File locking allows users to place locks on files and folders in Team Shares. This feature is useful when you want to prevent other user accounts from editing your items when you are making changes, which prevents file sync warnings. You can place locks on a whole Team Share, a subfolder in a Team Share, or a file in a Team Share. When an item is locked, a lock icon will be placed over the file or folder, and it will become read-only for others subscribed to the Team Share.

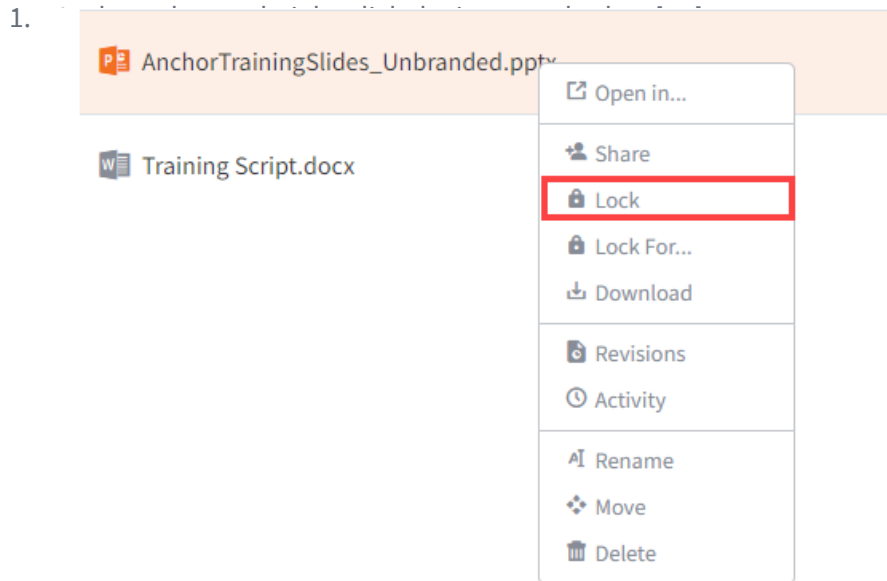
If you forget to lock a file or folder before you begin making changes, you could encounter file sync warnings. A file sync warning might take the form of a collision, where two Team Share subscribers try to edit the same file at the same time, or a locked change warning, where a user attempts to edit a locked file. When a file sync warning occurs, the system will notify you of the conflict, and will help you resolve the issue.

Your administrator can configure a Team Share so that Microsoft Team Share files automatically prompt you to lock the files each time they are opened. When you confirm the lock, the files will automatically unlock when you close the file.

## How to Lock Files and Folders in the Web Portal

In the web portal, you can place locks on a whole Team Share, a subfolder in a Team Share, or a file in a Team Share. When an item is locked, a lock icon will be placed over the file or folder, and it will become read-only for others subscribed to the Team Share.

To place a lock on a file or folder in the web portal:



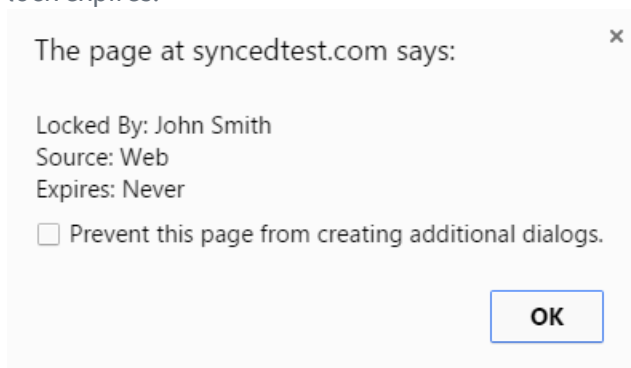
The item is now locked, and is read-only for everyone else in the share.

2. Alternatively, to lock the folder or file for a specific amount of time, select **Lock For**. A pop-up window displays, allowing you to select a time period, including: 30 minutes, 1 hour, 3 hours, 6 hours, or 1 day.
3. When you are finished editing, you must unlock the item. To unlock the item, right-click the file or folder again, and select **unlock**.

## Viewing Lock Information

When you are working in the web portal, you can view information about who locked the file or folder.

1. In the web portal, right-click the Team Share item, and select **Lock Info**. A dialog box displays, giving you information about who locked the item, where the item was locked, and when the lock expires.



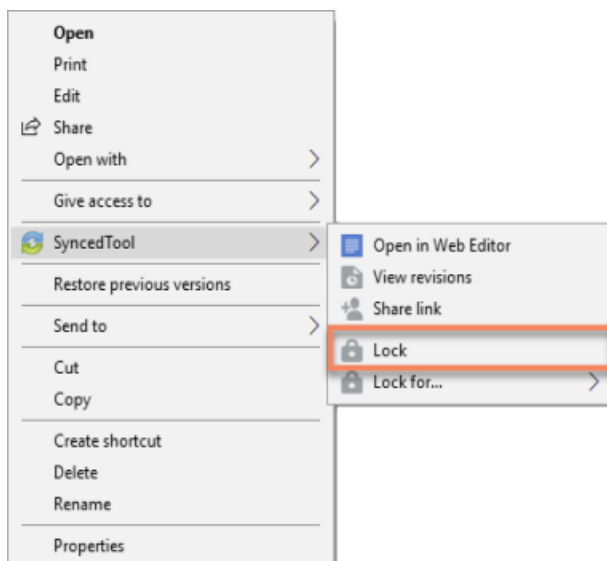
## How to Lock Files and Folders in the Desktop Client

In the desktop client, you can place locks on a whole Team Share, a subfolder in a Team Share, or a file in a Team Share. When an item is locked, it will become read-only for others subscribed to the Team Share.

### Manually Locking a File or Folder

To manually place a lock on a file or folder on a Windows or Mac machine:

1. In the desktop client, right-click on the Team Share item, point to the sync menu, and select **Lock**. The Team Share item will remain locked until you unlock the item.



2. Alternatively, to lock the folder or file for a specific amount of time, point to **Lock for**, and select a time period, including: 30 minutes, 1 hour, 3 hours, 6 hours, or 1 day.

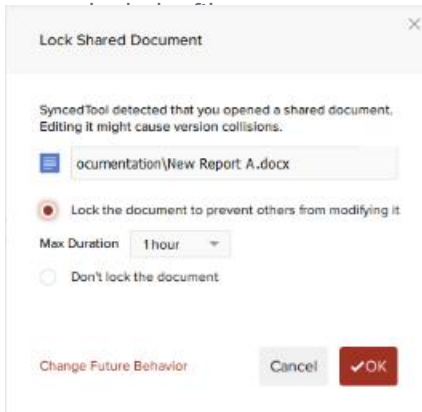
### Auto-Locking Files

If your administrator has turned on Auto-Locking, please note expected Auto-Locking behavior:

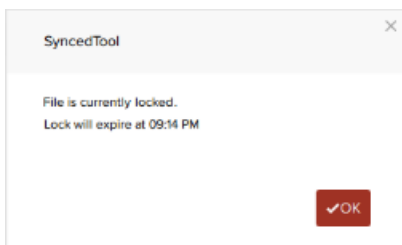
- This feature applies to .doc, .docx, .xlsx, .ppt, and .pptx files. This feature also applies to .xls, .odt, .ods, and .odp documents if the documents are opened with LibreOffice or OpenOffice.
- This feature is not supported for *Word for Mac* and .xls files opened with Excel.
- This feature is only accessible from the desktop client installed on local machines.

To open a file using this feature:

1. Click to open a file in the Team Share. You will be presented with a dialog box that will prompt



2. Select the **Lock the document** radio button to confirm the lock. You can also select a **maximum lock time period** in the *Max Duration* drop-down menu to determine how long the auto-lock will be in effect. You can select from 1 hour (default), 2 hours, 4 hours, or 8 hours. After the time period has expired, the auto-lock will expire. Or, the file will automatically unlock when you close the file.
3. Depending on the administrator's configuration settings, if another user opens a file that you have locked, he or she will be presented with a pop-up notification. If this notification is ignored, the user will be prompted to save the file with a different name.

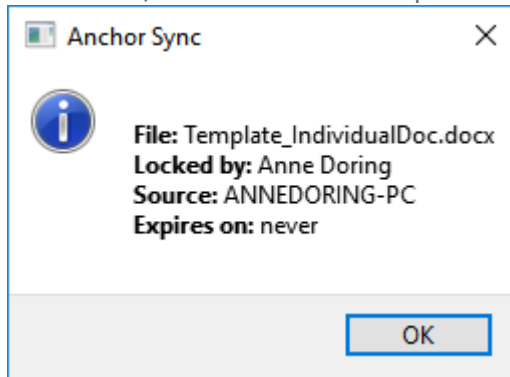


**Note:** When attempting to edit a Microsoft Word 2013 or Microsoft Excel 2013 locked file, offending users will need to actively clear the read-only notification before they can edit a file. Older revisions of Microsoft Word, however, will only display a read-only notification in the toolbar area. It is important to be mindful when working in Team Shares, and to pay attention to display indicators and warning messages.

## Viewing Lock Information

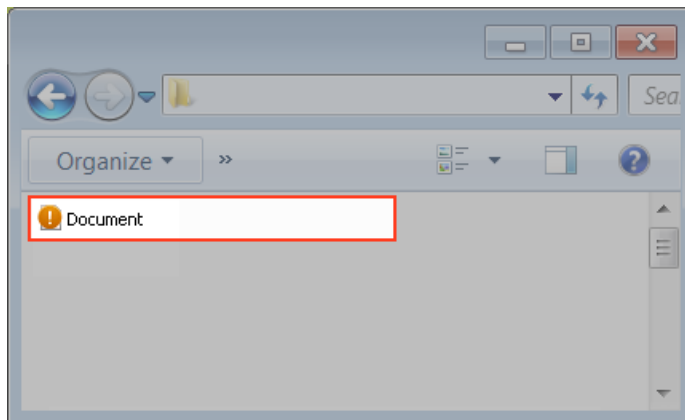
When you are working in the desktop client, you will see a lock icon displayed over a file or folder when it has been locked by you or another Team Share subscriber. Optionally, you can view information about who locked the file or folder.

1. In the desktop client, right-click the Team Share item, point to the sync menu, and select **Lock Info**. A dialog box displays, giving you information about who locked the item, where the item was locked, and when the lock expires.



## How to Resolve File Sync Warnings

The desktop client generates file sync warnings to alert end users of potential problems with the file sync process. Each warning provides an automated resolution option.



## Common Types of File Sync Warnings

You might encounter a few different types of file sync warnings when working in Team Shares. For example:

- Collision—A collision occurs when one file is modified in two different places at the same time. When this happens, only one of the revisions will successfully sync to the server, and the other revision will be marked as a collision. For example, User A and User B both open the same file from two separate locations, without locking the file. User A edits and saves her file, and this new revision is synchronized to the server. User A edits and saves her file again, and this updated revision is again synchronized to the server. User B is now editing an older revision of the file. When User B saves his revision of the file, it will *not* synchronize to the server, and will instead be marked as a collision.
- Locked Change Warning—A locked change warning occurs when a user attempts to modify a file that has been previously locked by another user, either at the file level or the folder level. For example, User A locks a file and the file is marked with a lock icon. Later, User B opens the file, ignoring the lock icon, and begins modifying the file. When User B attempts to save his revision, it does not immediately synchronize with the server, and is instead marked as a locked change warning. When User A unlocks the file, User B's revision will automatically synchronize to the server without any additional action on his part.

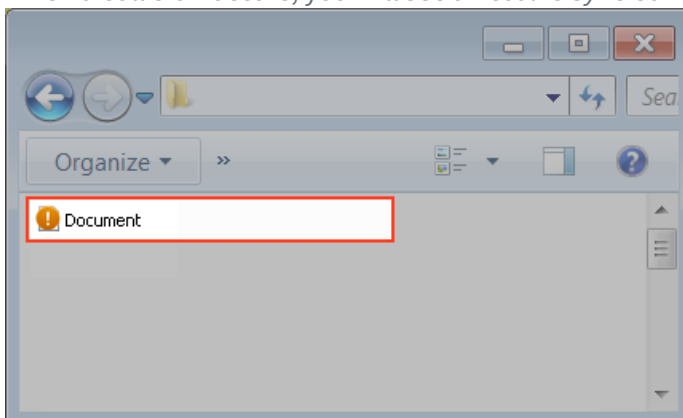
Your administrator can configure file locking so that locks are stronger (hard locks); in these instances, you will not encounter a locked change warning. For more information, please contact your administrator.

**Note:** If Team Share subscribers forget to lock files and folders before making changes, file sync warnings will occur more often; it is therefore considered a best practice to lock files or folders before making changes.

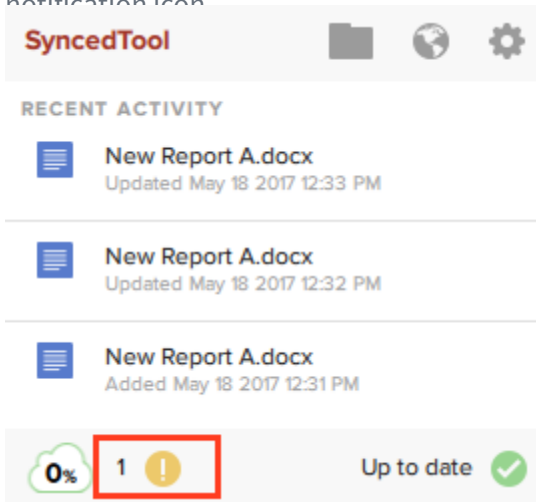
## Resolving a Collision

To resolve a collision on a Windows or Mac machine:

1. When a collision occurs, you will see a *Resolve Sync Conflict* icon.

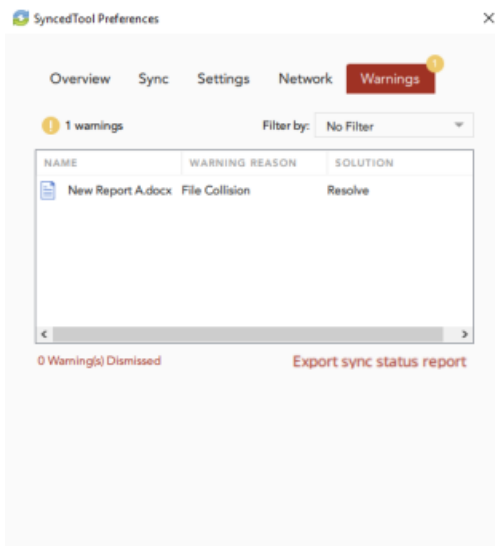


- Click the icon on your computer's system tray or menu bar and select the **Sync Conflicts** notification icon.



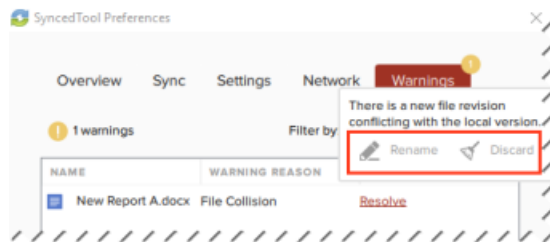
**Note:** On a Windows machine, the icon is located in the lower right-hand corner of the screen; on a Mac machine, the icon is located in the upper right-hand corner of the screen.

The *Preferences* dialog box displays, showing the *Warnings* tab.

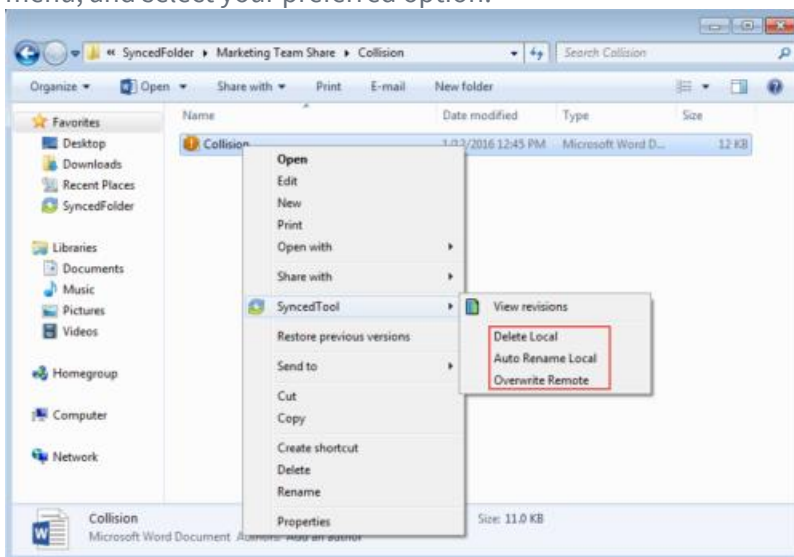


- In the *Warnings* tab, click the **Resolve** link to learn more about the collision.

- a. Click the **Rename** button to rename your copy to include the term *collision* appended to the end. When this option is selected, you will see two files: the *original\_file\_name* file and the *original\_file\_name (collision)* file.
- b. Click the **Discard** button to delete your copy without saving changes.
- c. Depending on administrative settings, you might also have the option to click the **Overwrite Current** button to sync your local copy as the current server revision.



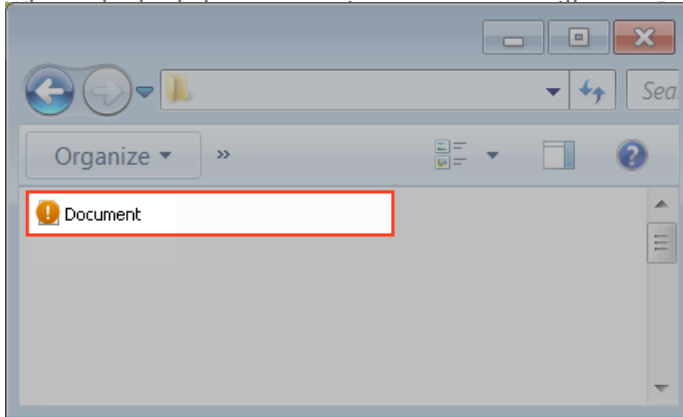
4. Alternatively, you can resolve the file sync warning directly within Windows Explorer or Mac Finder. For example, on a Windows machine, right-click the affected file, point to the sync menu, and select your preferred option.



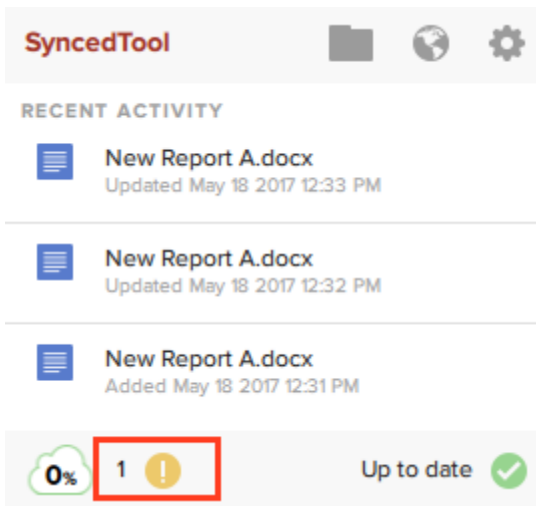
## Resolving a *Locked Change Warning*

To resolve a locked change warning on a Windows or Mac machine:

1. Click the **Resolve Sync Conflicts** icon.



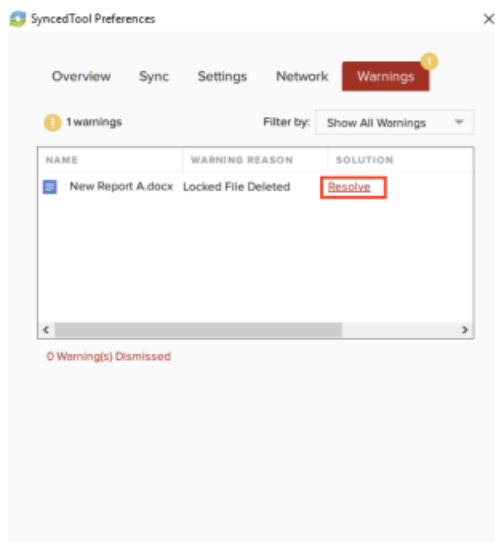
2. Click the icon on your computer's system tray or menu bar and select the **Sync Conflicts** notification icon.



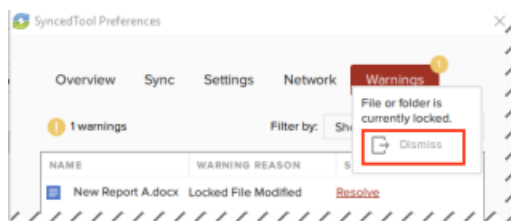
**Note:** On a Windows machine, the icon is located in the lower right-hand corner of the screen; on a Mac machine, the icon is located in the upper right-hand corner of the screen.

The *Preferences* dialog box displays, showing the *Warnings* tab.

3. In the *Warnings* tab, click the **Resolve** link to view more information about the locked change warning.



4. Click the **Dismiss** link to clear the warning. The system will resolve this issue for you as soon as the lock is removed.



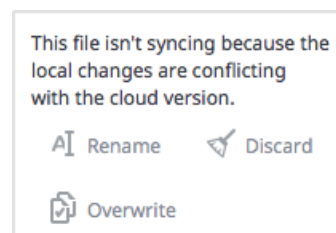
## Other Types of File Sync Warnings

In total, the desktop client can generate six different types of file sync warnings:

### File Collision

This file isn't syncing because the local changes are conflicting with the cloud version. To resolve this issue, you can select from:

- **Rename** - Rename the local file so the new changes sync to the cloud. This creates a new file.





- **Discard** - Discard the new changes and sync down the cloud version. This option will send your recent local changes to the Recycle Bin.
- **Overview** - Overwrite the cloud version with the new changes.  
**Note:** This option will only be visible if it the *Allow users to overwrite collisions* policy is enabled.

## Folder Exists Upstream (Folder collision)

This folder isn't syncing because a folder with the same name already exists in the cloud. To resolve this issue, you can select from:

This folder isn't syncing because a folder with the same name already exists in the cloud.

 Rename  Delete

- **Rename** - Rename the local folder to begin syncing to the cloud. This creates a new folder.
- **Delete** - Delete this folder and sync down the cloud version. After choosing **Delete**, users are prompted to confirm. Clicking the **OK** button will send your local folder to the Recycle Bin.

## Invalid Credentials for Synced Network Path

There is a problem connecting to this folder. You can try updating your credentials to regain access. After clicking **Enter Credentials**, the user will be prompted to log in.

There is a problem connecting to this folder. You may try updating your credentials to regain access.

 Enter Credentials

## File Is Locked

The new changes won't sync because the file has been locked. This error will resolve itself when the file is unlocked.

The new changes won't sync because the file has been locked.

**Locked by:** John Doe  
**Source:** John-MacBook-Pro  
**Expires:** May 11, 2017 5:21 PM

## Sync Root Folder Missing

This folder isn't syncing because it could not be found.

This folder isn't syncing because it could not be found.

 Unsubscribe  Re-Sync

This could happen due to one of two situations:

- Folder was actually deleted or never created.
- Not able to access the drive itself (for example, the folder is located on a flash drive or network share).

To resolve this error, you can select from:

- **Unsubscribe** - this option will unsubscribe the user from the Team Share.
- **Re-Sync** - this option will re-sync this data from the cloud.

## Folder Permission

You don't have the right permissions to sync this folder. To resolve this warning, you can select from:

You don't have the right permissions to sync this folder.

 Dismiss

- **Dismiss** - this option will hide the warning; the folder will not sync.

## Team Share Permission

You do not have permission to delete this file. To resolve this warning, you can select from:

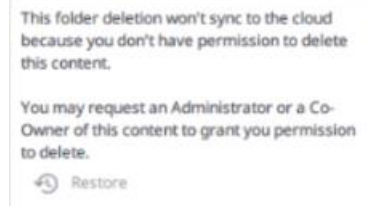
- **Restore** - this option will restore the deleted file.

This file deletion won't sync to the cloud because you don't have permission to delete this content.

You may request an Administrator or a Co-Owner of this content to grant you permission to delete.

You do not have permission to delete this folder. To resolve this warning, you can select from:

- Restore - this option will restore the deleted folder.



You do not have permission to move this file. To resolve this warning, you can select from:

- Revert - this option will restore the moved file.

This file move operation won't sync to the cloud because you don't have permission to move content from the original location, and/or into the new location.

You may request an Administrator or a Co-Owner, possibly of both locations, to grant you permission to move.

You do not have permission to move this folder. To resolve this warning, you can select from:

- Restore - this option will restore the moved folder.

This folder move operation won't sync to the cloud because you don't have permission to move content from the original location, and/or into the new location.

You may request an Administrator or a Co-Owner, possibly of both locations, to grant you permission to move.

You do not have this permission to create files. To resolve this warning, you can select from:

- Delete - this option will delete the newly created file.

This new file won't sync to the cloud because you don't have permission to create files in this folder.

You may request an Administrator or a Co-Owner of this folder to grant you permission to create content.

You do not have permission to create folders. To resolve this warning, you can select from:

- Delete - this option will delete the newly created folder.

This new folder won't sync to the cloud because you don't have permission to create folders in this location.

You may request an Administrator or a Co-Owner of this folder to grant you permission to create content.

You do not have permission to edit files. To resolve this warning, you can select from:

- Discard - this option will discard edits to the file.

The new changes won't sync to the cloud because you don't have permission to edit. New changes from the cloud won't sync down either.

You may request an Administrator or a Co-Owner of this content to grant you permission to edit.

# Restoring Files and Folders

The system provides many options for protecting—and optionally restoring—data. When you use the system, you can be sure that your data is safe and protected. For example, you can restore older revisions of files and folders, restore deleted files and folders, or use the Revision Rollback feature to restore all files within an entire folder to an earlier revision before a selected date.

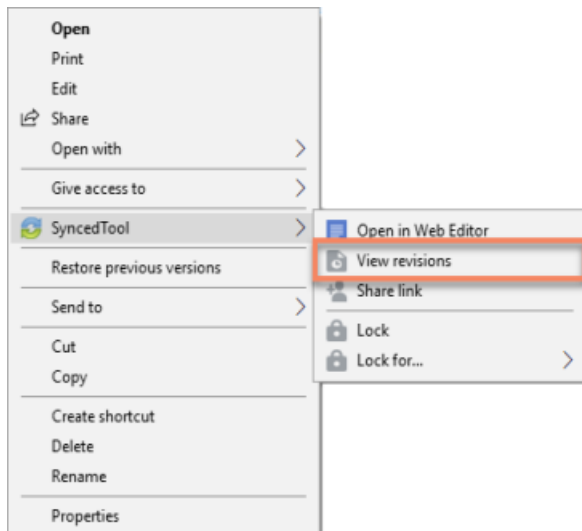
This section will provide information on how you can protect, and optionally restore, your data.

## How to View and Restore a Revision

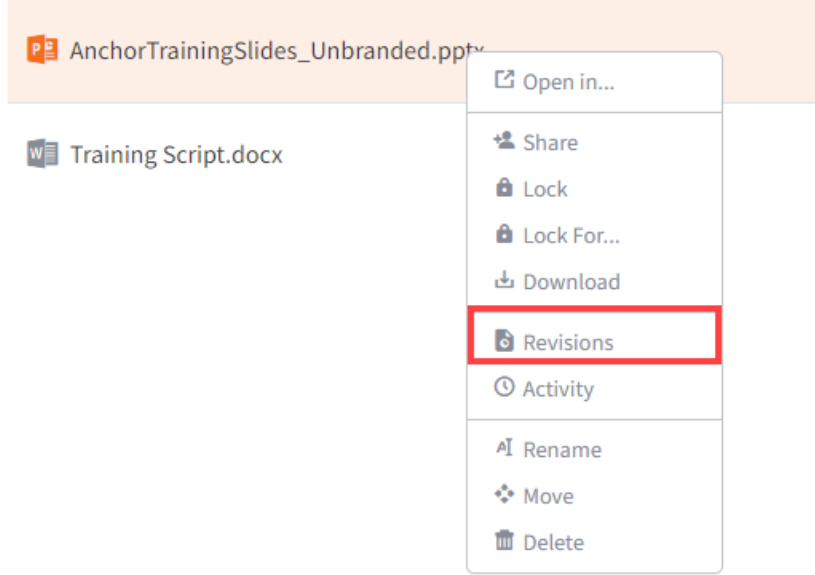
When you edit a file, the system keeps track of each revision. Using the revisions feature in the web portal, you can view—and optionally restore—older revisions of files. This feature is useful when you make a mistake editing and saving a file, or if you want to see revisions made by other members of your Team Share.

To view and restore revisions:

1. From the desktop client on your local machine, right-click a file, point to the sync menu, and select **View Revisions**.



- Alternatively, if you are working in the web portal, right-click a file and select **Revisions**.



The *Browse File Revisions* page displays, listing all revisions of the file.

- In the *Browse File Revisions* page, click the title of the file to view the file in the Web Preview tool.
- Click the **Download Revision** link to download a previous revision. The file will download to your local machine.
- Click the **Restore Revision** link to overwrite the current file with the previous revision.

Switch to classic Anne Doring ▾

Search files...

Anchor Training & Documentation / Work in Progress / E&T Playbook

### Revisions for AnchorTrainingSlides\_Unbranded.pptx

FILENAME	RECEIVED	FILE SIZE	DOWNLOAD	RESTORE
AnchorTrainingSlides_Unbranded.pptx	Apr 1, 2016, 6:26:36 AM	1.82 MB	Download Current	Current Revision
AnchorTrainingSlides_Unbranded.pptx	Dec 18, 2015, 3:37:57 PM	1.82 MB	Download Revision	Restore Revision

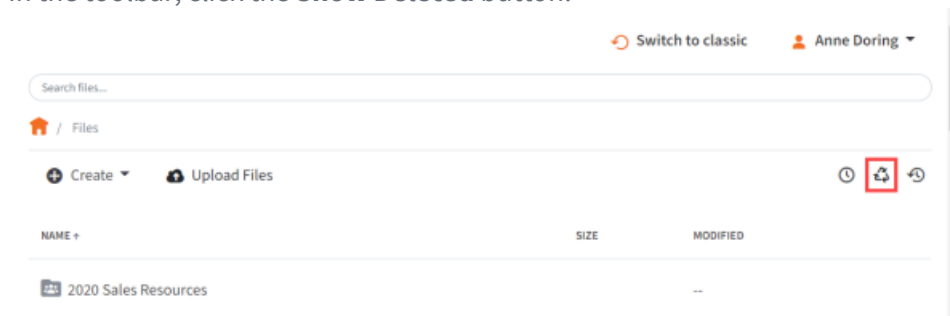
Currently Displaying Revisions For 2 Files

## How to View and Restore Deleted Files and Folders

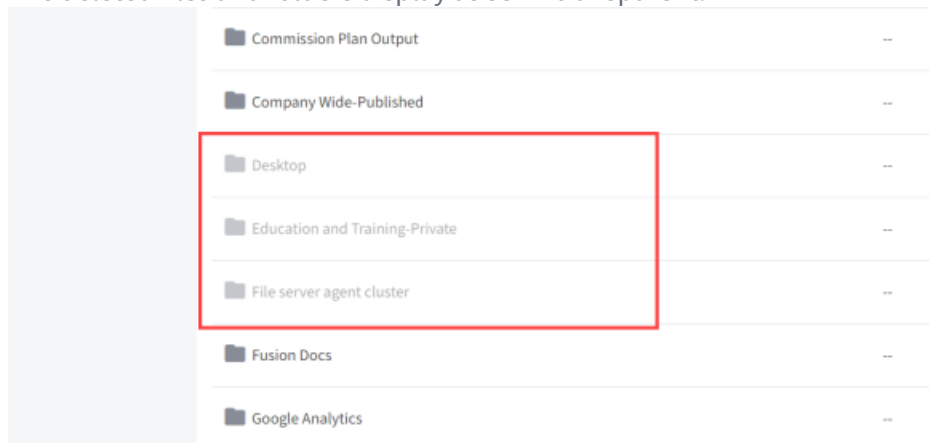
Depending on your administrator's settings, you can view and restore deleted files and folders from within the web portal. The ability to view and restore deleted content is one of many data protection features available to you.

To restore files and folders from the web portal:

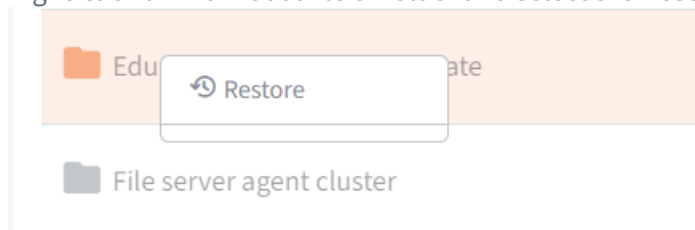
1. In the web portal, click the **Files** tab. The *Browse Files* page displays.
2. In the toolbar, click the **Show Deleted** button.



The deleted files and folders display as semi-transparent.



3. Right-click an individual file or folder and select the **Restore** link.



4. Alternatively, to restore all deleted files in the current folder, click the **Restore Deleted** button in the toolbar.



The *Restore Files* dialog box displays, allowing you to restore all deleted files, or certain files deleted between a specified time frame.

**Restore Files**

Restore All Files  
 Restore Files Deleted Between

Start Date

End Date

Cancel Restore

The selected files and folders will be restored.

**Note:** You cannot navigate away from the page until the restore process is complete.

## How to Use the Rollback Feature

The Revision Rollback feature allows end users to restore all files within an entire folder (standard folder, Team Share, or Backup) to an earlier revision before a selected date. The Revision Rollback feature is particularly useful in situations where files might have been corrupted by ransomware; it utilizes a file's revision history, and restores all currently-existing content in the root to a healthy revision at a specified point-in-time. In these cases, you can use the Activity Log to determine when the infected revisions were uploaded, and then roll back files prior to the point of infection.

**Note:** A file's revision can refer to the originally uploaded file (first version) or a revision of an edited file (subsequent revisions).

To access the Revision Rollback feature:

1. In the web portal, click the **Files** tab. The *Browse Files* page displays.
2. In the *Browse Files* page, navigate to the appropriate folder. While inside the folder, click the **Rollback** button in the toolbar.



The *Rollback* pop-up window displays, prompting you to select a date and time.

✕

**Rollback**

Restore all files in this root to the most recent revision before:

Rollback to i  📅

Unlock locked files before rollback?

Cancel Rollback

3. Select a day and time *before* the time to which you want to restore. For example, if you select June 25th at 12:40 PM, the feature will find the first file revision *before* June 25th at 12:40. If a revision exists at 12:40 and another at 12:39, the file at 12:39 will be restored.

Please note that the Revision Rollback feature utilizes a 24 hour clock, and is based off of the timezone of the Anchor server. The US SaaS server is located in the Mountain timezone; the Canadian SaaS server is located in the Pacific timezone.

4. Click **Rollback** when you are finished.

# Backups

You can create backups of files and folders that exist on your local machine. You might want to create a backup of a file or folder that you want to protect, but do not want to sync. Backups do not reside in Synced Folder, and cannot be shared with another user account.

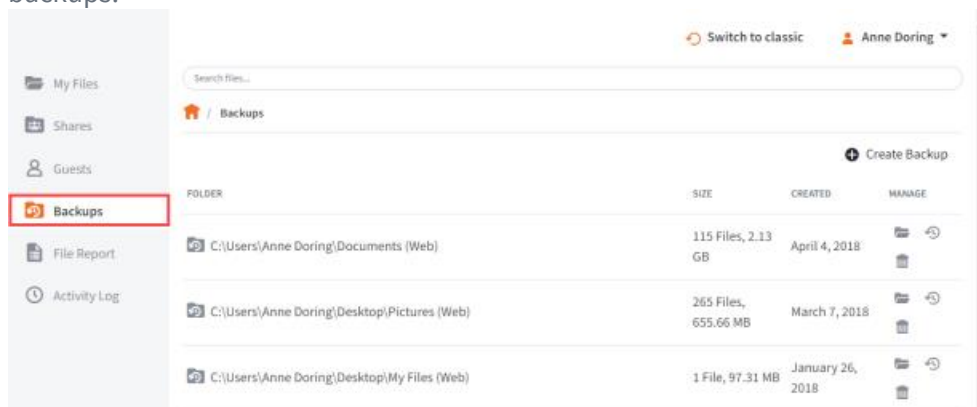
To create a backup, you can use the **Backups** tab in the web portal, where you can also manage and restore backups. Alternatively, you can create backups directly on your local machine.

## How to Create Backups in the Web Portal

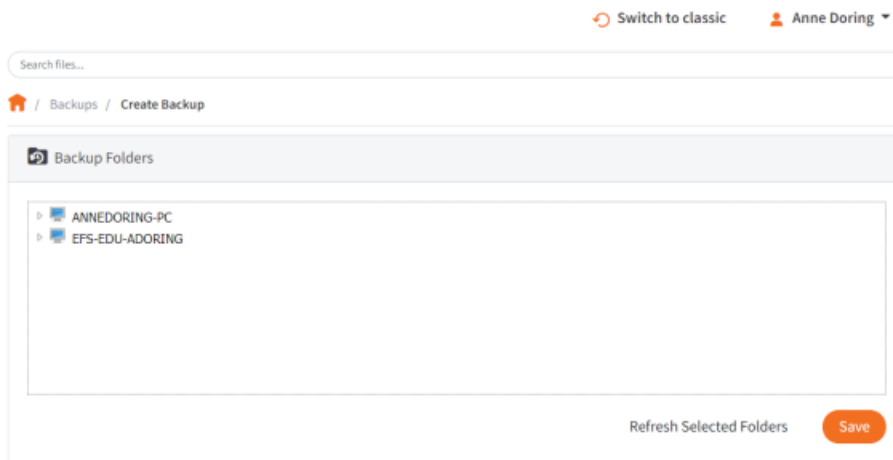
When you back up a folder, you can access your backups from the web portal and from mobile apps. All new changes are continuously backed up. Additionally, backups include revisions to files.

To back up a folder from the web portal:

1. In the web portal, click the **Backups** tab. The *Backups* page displays, listing all of your existing backups.



2. In the *Backups* page, click the **Create Backups** button. The page refreshes to allow you to navigate your local machine and select the folder you want to back up.



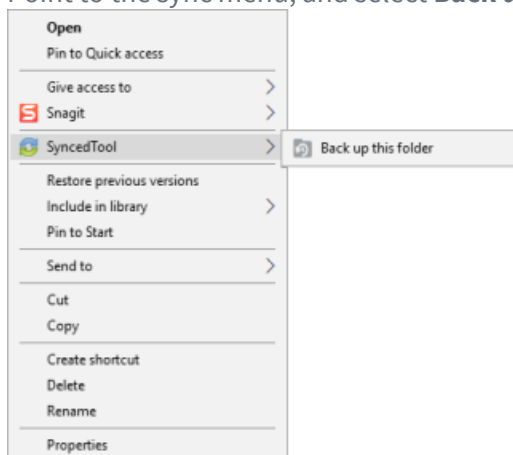
3. Click the **Save** button when you are finished. The page refreshes to show you all backups that have been configured.

## How to Create Backups on your Local Machine

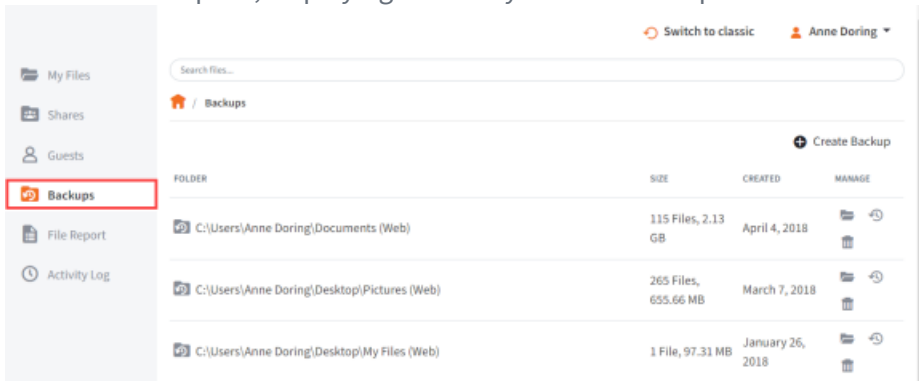
In addition to backing up folders in the web portal, you can also back up your folders directly from your local machine. Like backups configured in the web portal, backups configured on your local machine continuously back up new changes, and will keep revisions.

To back up a folder from your Windows or Mac machine:

1. Right-click the folder you want to back up. A *menu* displays.
2. Point to the sync menu, and select **Back up this folder**.



Your browser opens, displaying the newly created backup.



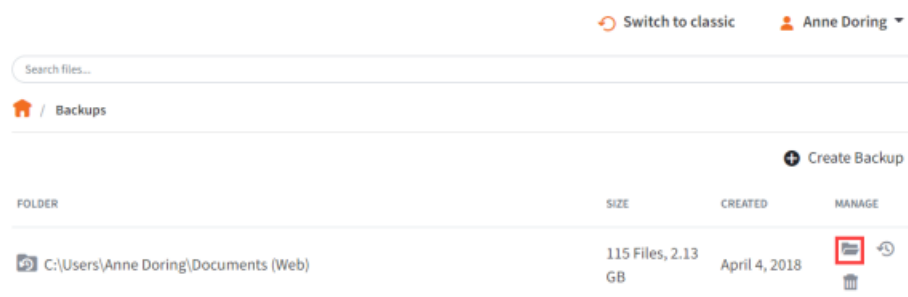
- To deactivate a backup from your machine, right-click the back up on your computer or laptop, point to the sync menu, and select **Remove backup**. The folder will no longer back up, and will be listed as *deactivated* in the web portal.

## How to Manage Backups in the Web Portal

You can manage all backups by clicking the **Backups** tab in the web portal. In the *Backups* page, you can manage the content of backups, browse the content of backups, delete backups, or restore backups.

To manage backups:

- In the web portal, click the **Backups** tab. The *Backups* page displays, showing a list of all existing backups.
- In the *Backups* page, you can browse the contents of the backup.
  - Click the **Browse** button.



The backup opens, allowing you to browse its content.

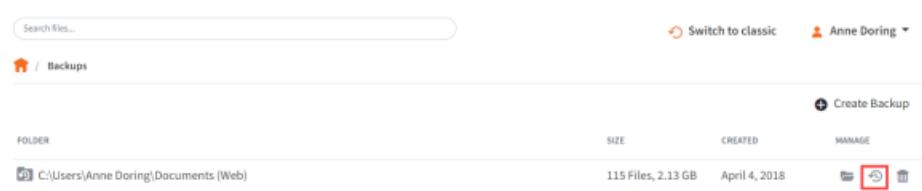
- Inside the backup, you can also:
  - Click the **Create Folder** button to create a new folder inside the backup.
  - Click the **Upload Files** button to add files to the backup.

- c. Click the **Rollback** button to restore all files within the entire folder to an earlier revision before a selected date. The Revision Rollback feature is particularly useful in situations where a file might have been corrupted by ransomware; it utilizes a file's revision history, and restores all currently-existing content in the folder to a healthy revision at a specified point-in-time. In these cases, you can use the Activity Log to determine when the infected revisions were uploaded, and then roll back files prior to the point of infection.
- d. Click the **Show Deleted** button to show files that have been deleted within the backup.
- e. Click the **Restore Deleted** button to return any deleted files to the backup.
- f. Click the **Erase All Revisions** button to erase previous revisions to files in the backup.



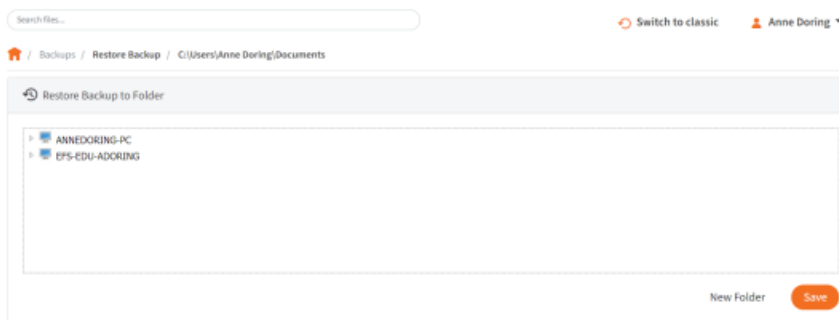
4. In the *Backups* page, you can restore a backup to a specific location.

- a. Click the **Restore** button.

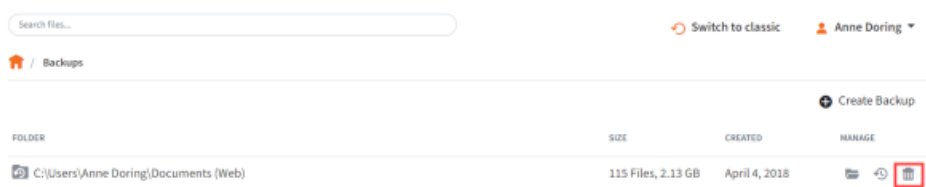


A *Restore Backup* page displays.

- b. In the *Restore Backup* page, browse to select a restore point. Optionally, click the **New Folder** button to create a new folder as a restore point.
- c. Click the **Save** button when you are finished.



5. Optionally, in the *Backups* page, click the **Delete** button to delete a backup.



The backup will delete.

# File Report and Activity Log

In addition to managing and sharing files and folders, you can also keep track of file listings and activity directly from the web portal.

With the file report, you can generate reports for all of your files, and export the report to your local machine. Use the *File Report* page in the web portal to generate these reports.

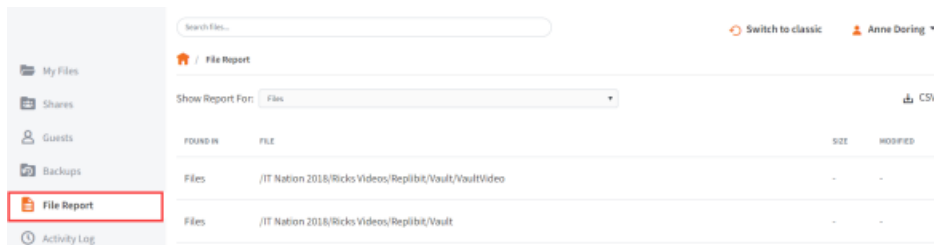
With the activity log, you can track all usage across the system, view audit trails, and track activity on Team Share users and guest accounts. Use the *Activity Log* page in the web portal to filter activity based on a set of criteria.

## How to View File Reports

The *File Reports* page allows you to keep track of all of your content in the system from one central location. In the *File Reports* page, you can filter by a specific folder or Team Share. You can then view the files within the folder, the date that each file was modified, and the size of the file. You can even export the report to your local machine.

To view file reports:

1. In the web portal, click the **File Reports** tab. The *File Reports* page displays.



2. In the *File Reports* page, use the *Show Reports For* drop-down menu to filter files within a specific folder or Team Share. The page refreshes to show files based on your selection. The information displayed for each file includes:
  - *Found In*—the folder in which the file is located
  - *File*—the path and the file name
  - *Modified*—the date the file was modified



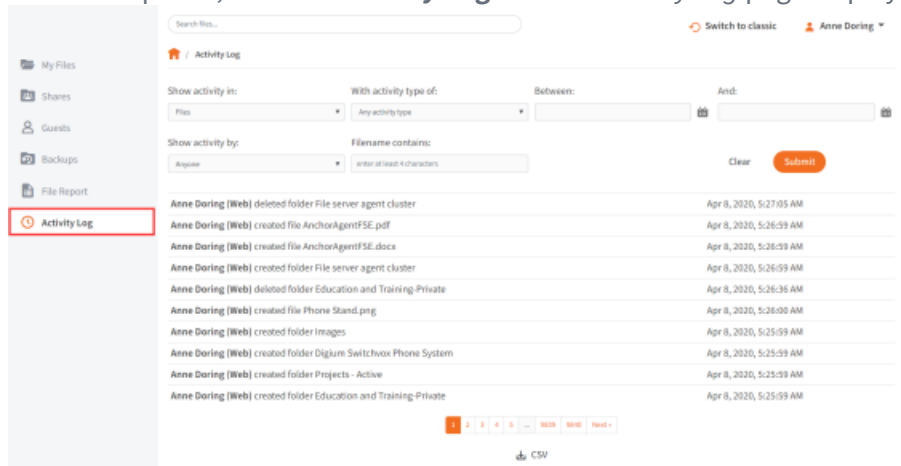
- Optionally, click the **CSV** button to export the report to your local machine.

## How to Track Activity

The *Activity Log* page allows you to track activity across the system from one central location. Using the *Activity Log* page, you can track usage, view audit trails, and follow activity on Team Share users and guest accounts. You can even track activity performed by your guest users.

To track activity:

- In the web portal, click the **Activity Log** tab. The *Activity Log* page displays.



- In the *Activity Log* page, use the drop-down menus to filter activity based on a set of criteria.

- Use the *Show Activity In* drop-down menu to select which **folder or Team Share** you want to track.
- Use the *with activity type of* drop-down menu to select the **type of activity** you want to track.
- Use the *between* date fields to enter the **date** on which the activity occurred.

- Use the *Show Activity By* drop-down menu to select the **user** who performed the activity. This list includes guest accounts that you have created, allowing you to track activity performed by your guest users.
  - Use the *filename contains* textbox to enter **a set of characters** that should be included in the search.
3. When you are finished entering criteria, click the **Submit** button. You will be presented with a list of activities that meet your selected criteria.

# Outlook Add-In

The Outlook add-in allows you to email links to files and folders using your Microsoft Outlook application. When you use this feature, you can share links to Synced Tool items, as well as local content, directly from within your email platform. Additionally, the Outlook add-in keeps track of the items that you have shared by creating and populating a *Shared Items* folder in your Synced Folder.

Other benefits of the Outlook add-in include the ability to send links—rather than standard attachments—to files and folders of any size, and the ability to send items as secure shares. Additionally, when you forward an email that originally included an attachment, you have the option of converting that attachment to a share link. Because the Outlook add-in integrates with Synced Tool, you always have a backup of these shared items without needing to store attachments within your email client.

**Note:** Microsoft Outlook revisions 2010+ (both 32-bit and 64-bit) are supported and recommended. Microsoft Outlook for Mac does not support third-party add-ins.

**Note:** Disabling the Outlook setting, *Use Cached Exchange Mode*, will prevent the add-in from generating share links when composing emails.

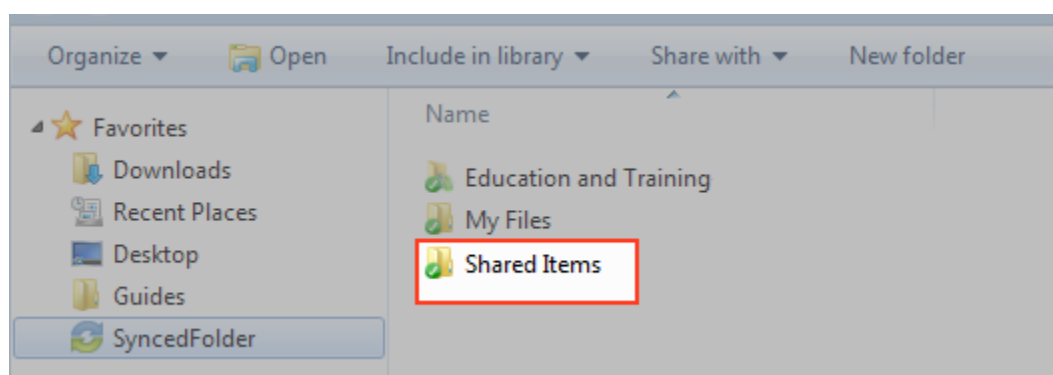
## Configuring the Outlook Add-In

When you configure your default settings, you can decide to

- Send notifications when a shared item is downloaded or uploaded;
- Limit the number of times a shared item is downloaded;
- Expire a shared item after a specified number of days; or
- Depending on your organization policy settings, send all items as secure shares.

**Note:** You can optionally configure the Outlook add-in so that all items are sent as secure shares; however, if certain policies are enabled for your organization, this feature is turned on by default, and you will not be able to configure this option.

Additionally, when configuring attachment policies, you can determine how the Outlook add-in manages your sent content. When you send items through the Outlook add-in, a new *Shared Items* subdirectory is created for you in your Synced Folder. By default, this folder is located at the top-level of your Synced Folder, but you can change its location when you configure your Outlook add-in preferences.



When you configure these policies, the Outlook add-in operates as a truly intelligent tool, automatically sending share links according to the way you like to work. For example, you can tell the add-in to

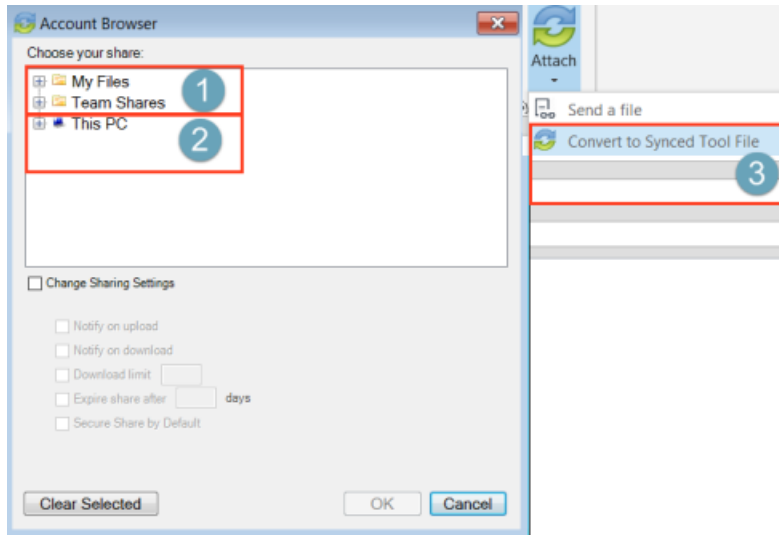
- Automatically use the Outlook add-in for attachments over a certain size, even when an email draft already includes a standard attachment (for example, when forwarding messages);
- Automatically use the Outlook add-in for all attachments, even when an email draft already includes a standard attachment; and
- Only use the Outlook add-in when selected.

## Using the Outlook Add-In

When you compose a message in Microsoft Outlook, you use the ribbon button to attach content in a variety of ways, including

- Browse and select files and folders stored in Synced Tool,
- Browse and select a local file stored on your machine, and

- Convert an attached file to a share link, which is particularly useful when forwarding email messages that originally included a standard attachment. You can decide to manually convert these items using the *Attach* drop-down menu, or this will happen automatically, depending on your attachment policies.



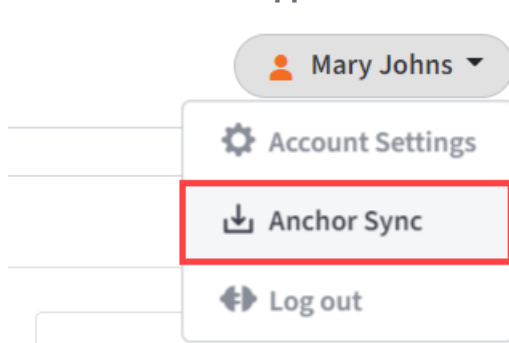
**Note:** When you send local files, or you convert an item to a share link, these items are stored as Synced Tool content in your Shared Items folder.

## How to Install the Outlook Add-In

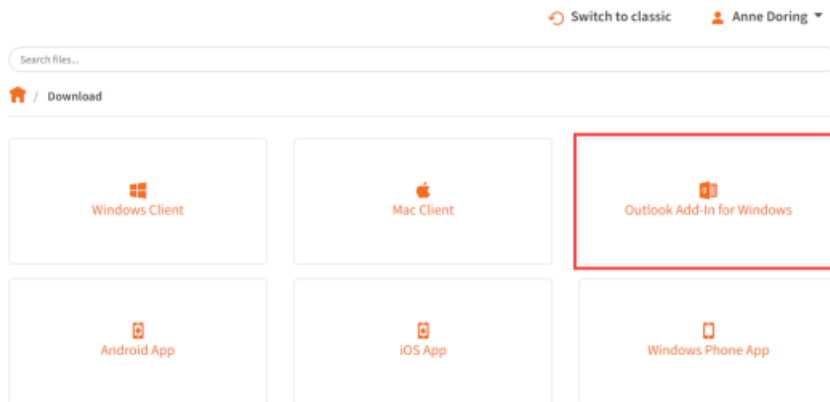
Before you can use the Outlook add-in, you must first download it from the web portal.

To download the Outlook add-in:

1. Click the **Download App** button in the web portal. The *Download* page displays.

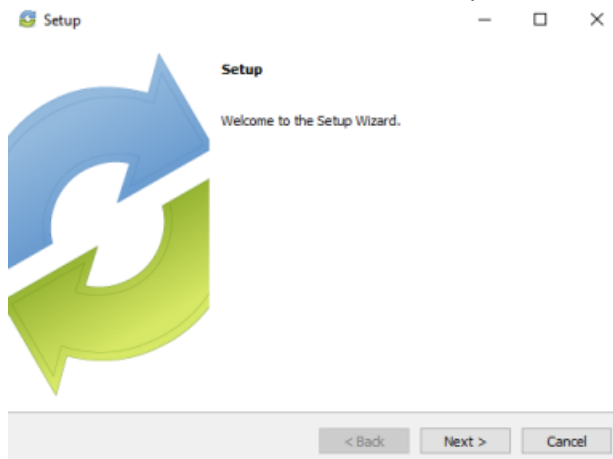


2. In the *Download* page, click the **Outlook** button.

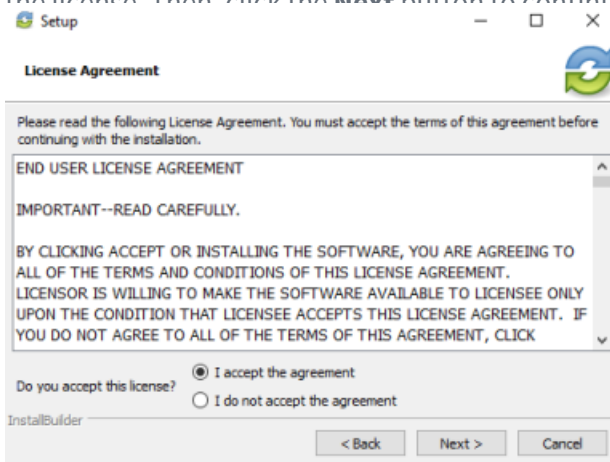


The file will start to download, or you will be prompted to save the file, depending on your browser type.

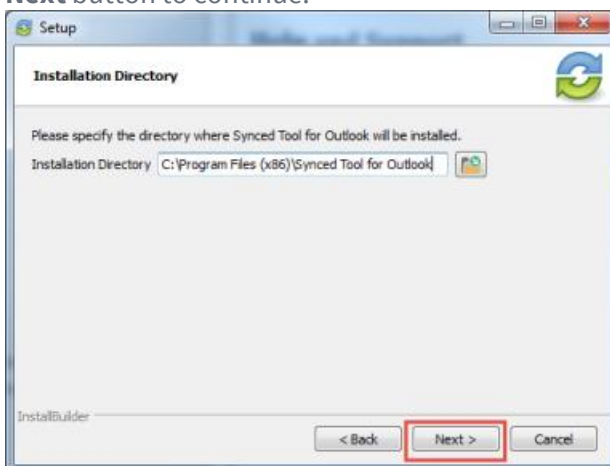
3. When the file finishes downloading, make sure Microsoft Outlook is closed, and click the **installation** file. The *Setup Wizard* opens.
4. Click the **Next** button to start the *Setup Wizard*.



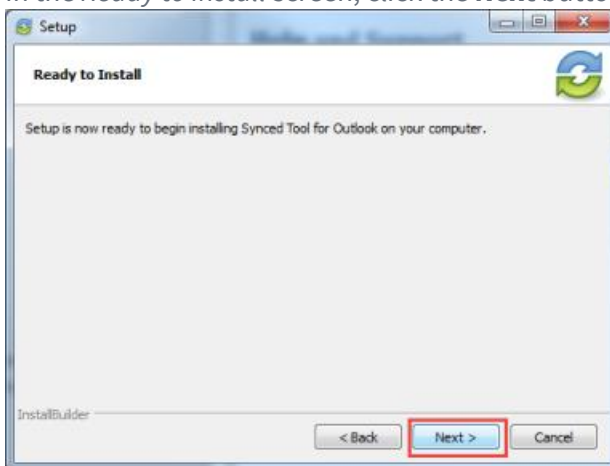
5. In the *License Agreement* screen, click the **I accept the agreement** radio button if you accept the license. Then, click the **Next** button to continue.



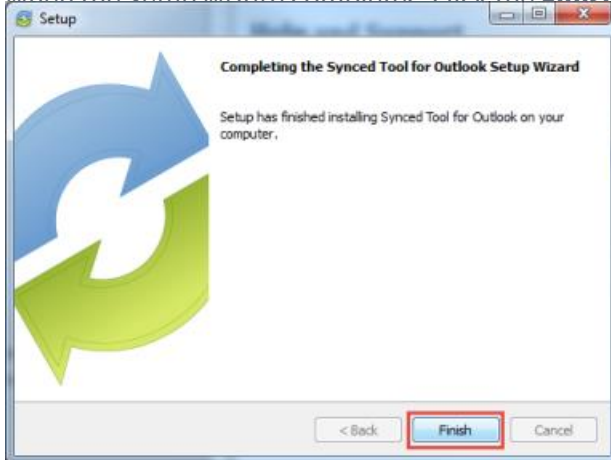
6. In the *Installation Directory* screen, select the location where you want the installation files to reside on your local machine. In most instances, you can accept the default location. Click the **Next** button to continue.



7. In the *Ready to Install* screen, click the **Next** button to begin the installation process.



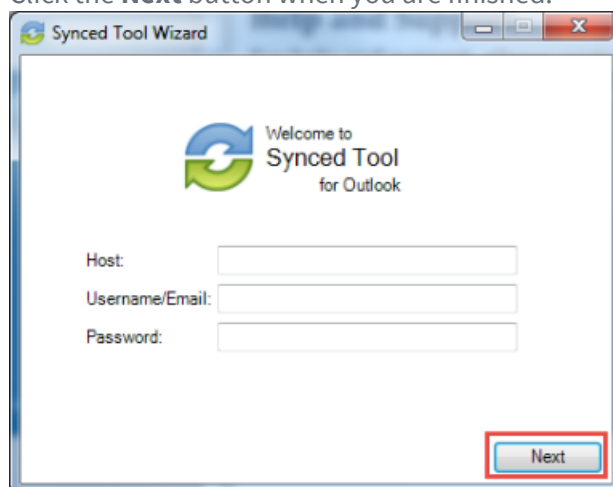
8. When the Setup Wizard completes, click the **Finish** button.



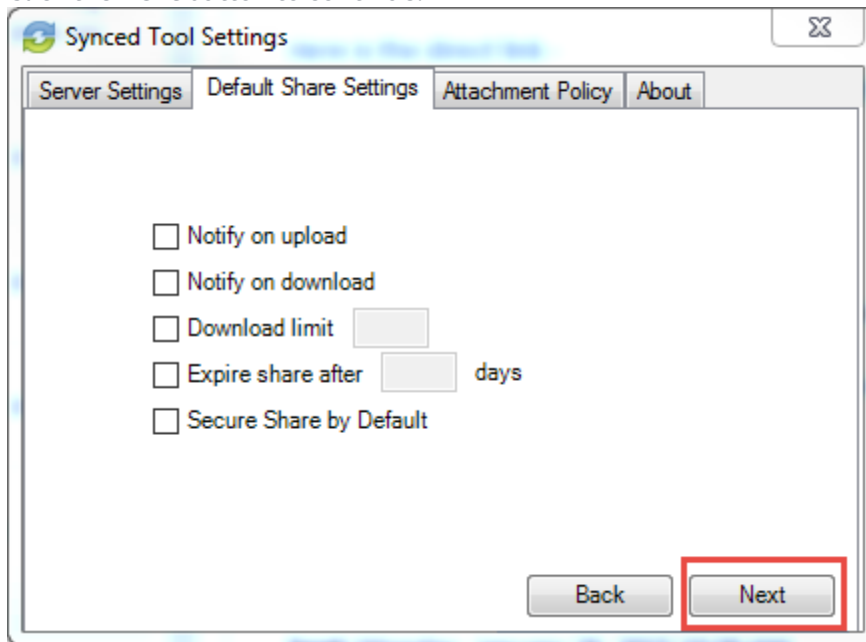
## How to Configure the Outlook Add-In

After you install the Outlook add-in, you can configure default share settings and attachment policies. When you configure these settings, the Outlook add-in operates as a truly intelligent tool, automatically sending share links according to your preferences.

1. When you launch Microsoft Outlook for the first time after installing the Outlook add-in, the *Wizard* displays, prompting you for login credentials.
  - a. If prompted, enter the **host name** of your organization in the *Host* field (for example, *syncedtool.com*).
  - b. In the *Username* field, enter the same **username** that you use to access the web portal.
  - c. In the *Password* field, enter the same **password** that you use to access the web portal.
  - d. Click the **Next** button when you are finished.

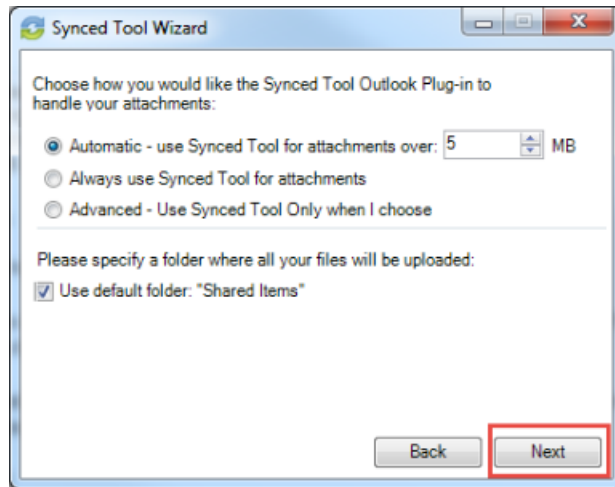


2. In the *Choose your Default Share Settings* screen, set default settings for how you share links.
  - a. Click the **Notify on upload** checkbox to receive notifications when an item is uploaded to a shared folder.
  - b. Click the **Notify on download** checkbox to receive notifications when the share is downloaded.
  - c. Click the **Download limit** checkbox, and enter a **download limit** number, to limit the number of times the share is downloaded by each recipient.
  - d. Click the **Expire share after** checkbox, and enter a **number of days**, to set a share to expire after the specified number of days.
  - e. Depending on your administrator's configurations, you may also have access to the **Secure Share by Default** checkbox. Click this checkbox to send all content as secure shares. If this option is selected, all recipients will be required to log in to access the shared content. Recipients who are not members of your organization will be added as guest users; a guest account will be created for the recipient, and login credentials will be provided.
  - f. Click the **Next** button to continue.

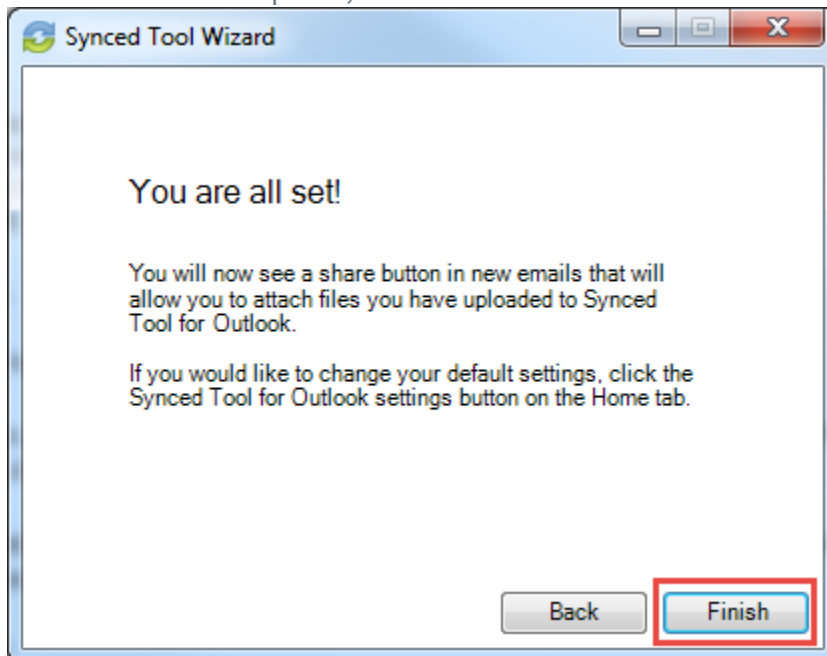


3. In the next screen, set default attachment policies.
  - a. Click the **Automatic** radio button to automatically use the Outlook add-in for attachments over a certain size.
  - b. Click the **Always use the desktop client for attachments** radio button to automatically use the Outlook add-in for all attachments.

- c. Click the **Advanced** radio button to only use the Outlook add-in when selected.
- d. Click the **Use default folder** checkbox to use the default location for storing shares configured from Outlook. If you uncheck this checkbox, you will be prompted to select another location on your local machine.
- e. Click the **Next** button to continue.



- 4. When the *Wizard* completes, click the **Finish** button.

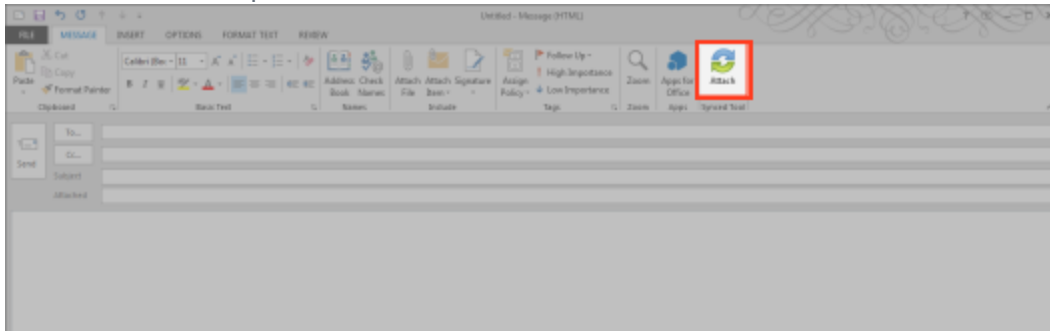


## How to Use the Outlook Add-In

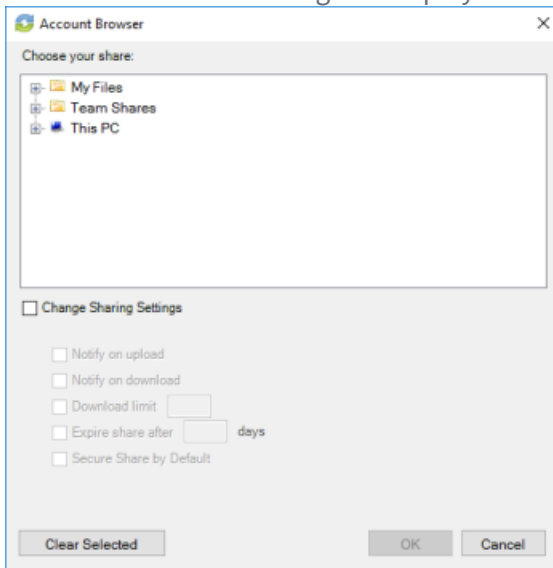
When you compose a message in Microsoft Outlook, you can use the *Attach* drop-down button to attach specific share content according to your defined preferences.

To use the Outlook add-in:

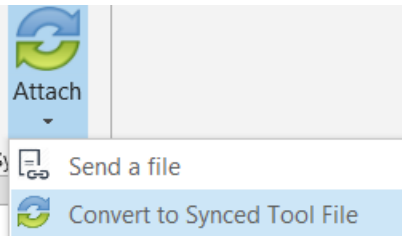
1. In Microsoft Outlook, create a new email message. The ribbon will display an *Attach* drop-down button.
2. Click the **Attach** drop-down button and select **Send a File**.



The *Account Browse* dialog box displays.

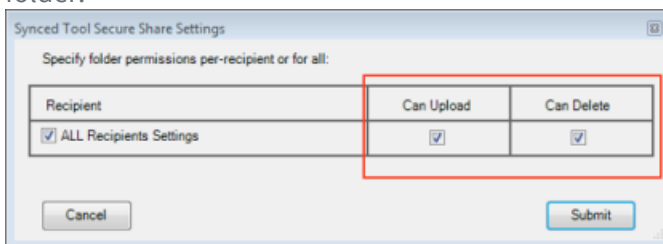


3. In the *Account Browse* dialog box, select the content you want to share.
  - To attach a file or folder stored in Synced Tool, click to expand the *My Files* folder, or the *Team Shares* folder, and select the appropriate content.
  - To send a file from your local machine, click to expand *This PC*. You can then browse and select a file on your machine.
  - Optionally, you can change your default share settings by clicking the **Change Share Settings** checkbox.
4. Alternatively, to convert an attached item to a share link, click the **Attach** drop-down arrow and select **Convert to Synced Tool File**.

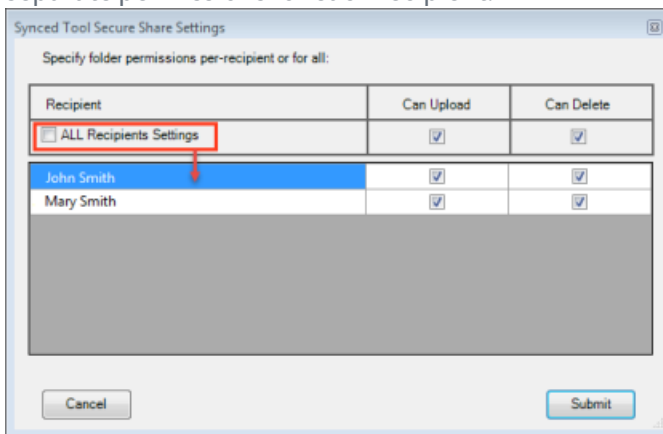


Any attached item will automatically convert to a share link, and will be stored in your *Shared Items* folder.

5. Click Outlook's standard **Send** button to send your email.
6. If you have selected to send a secure share link to an entire folder (rather than a single file), a *Secure Share Settings* dialog box will display, prompting you to configure permission for each recipient. You can set *upload* permissions, which allows recipients to upload content into the shared folder, or *delete* permissions, which allows recipients to delete content in the shared folder.



Optionally, uncheck the **ALL Recipients Settings** checkbox if you would like to configure separate permissions for each recipient.



# WebDAV

WebDAV allows you to map a network drive to your files in the cloud. With WebDAV, you will not have to download files or install the desktop client. Before configuring WebDAV, you should check with your administrator to ensure that this option is enabled in your system.

## How to Map a Network Drive on a Windows Machine

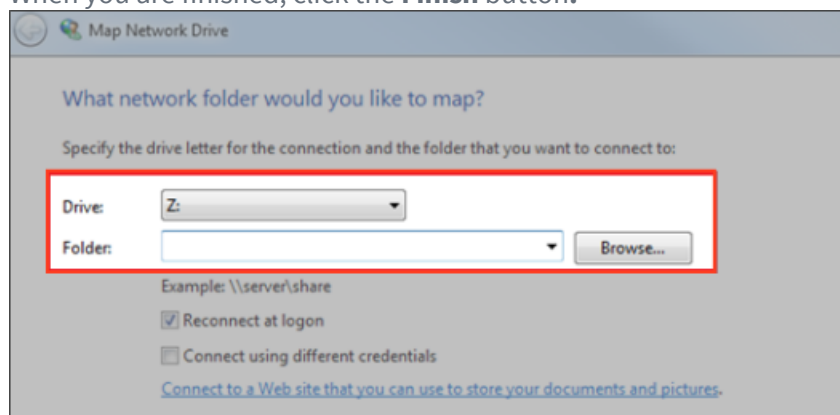
To map a drive on a Windows machine:

1. In your start menu, click **Computer**. The *Computer* dialog box displays.
2. In the *Computer* dialog box, click the **Map Network Drive** button.



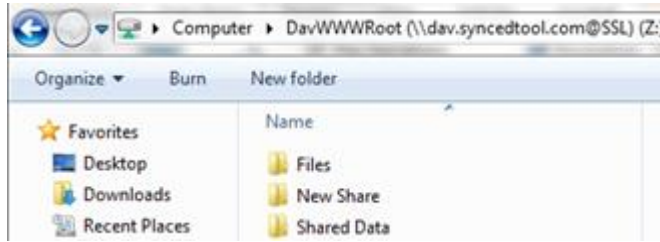
The *Map Network Drive* dialog box displays.

3. In the *Map Network Drive* dialog box, configure the appropriate drive and folder.
  - a. In the *Drive* drop-down menu, select a **drive letter**.
  - b. In the *Folder* field, enter the location of the folder (for example, **https://dav.syncedtool.com**).
  - c. When you are finished, click the **Finish** button.



4. Enter your **username** and **password** when prompted and click the **OK** button. Your personal folders and Team Shares will now display. You will be able to access the WebDAV folder in *My*

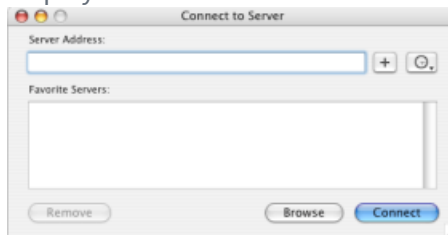
Network Places.



## How to Map a Network Drive on a Mac OS X Machine

To map a drive on a Mac Machine:

1. In *Finder*, click the **Go** menu and select **Connect to Server**. The *Connect to Server* window displays.



2. In the *Connect to Server* window, enter your **server address** (for example, `https://dav.syncedtool.com`), and click the **Connect** button.
3. When prompted, enter your **username** and **password**. Active Directory users must enter credentials as `domain\username`.
4. When you are finished, click the **Connect** button.