



# FileCloud Server

Version 20.1

User Guide

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# About FileCloud Server for Users

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

FileCloud supports how you work:



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



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



Choose which browser you want to use (Google Chrome, Internet Explorer, Mozilla Firefox, Oracle Opera, Apple Safari)



Mount your FileCloud data as a Windows drive



Access files stored in FileCloud from your Microsoft applications



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

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

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



# User Account Types



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

Table 1. User Types Comparison

User Access Feature	Full Access	Guest Access	Limited Access
User Portal (Web Browser) Access	Permitted Fully functional	Permitted Not all functions available	Permitted Not all Functions Available
View shared files	Permitted	Permitted	Permitted
View Network Shares	Permitted	Permitted	Only via shares created by users
Authentication	Local / ActiveDirectory	Local / ActiveDirectory	Local Only
Mobile App Access	Permitted Fully functional	Permitted Not all functions available	Not Available
Personal storage in FileCloud	Available	Not Available	Not Available
Share files with other users	Permitted	Permitted	Not Available
Access storage using Cloud Drive	Permitted	Permitted	Not Available
Sync storage using Cloud Sync	Permitted	Permitted	Not Available
SSO Login	Permitted	Permitted	Not Available
Group Membership	Can be member of any group	Can be member of any group	Not Available
Two factor authentication	Permitted	Permitted	Not Available
Admin Account	Can be Admin Account	Can be Admin Account	Cannot be an Admin Account
Team Folders	Permitted	Permitted	Only via shares created by users
Automation App	Permitted	Permitted	Not Available
File and Folder Comments	Permitted	Permitted	Not Available

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



## Admin Access

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



## Full Access

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

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

## Guest Access

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

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

## Limited Access

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

- view/upload/download to content shared with them

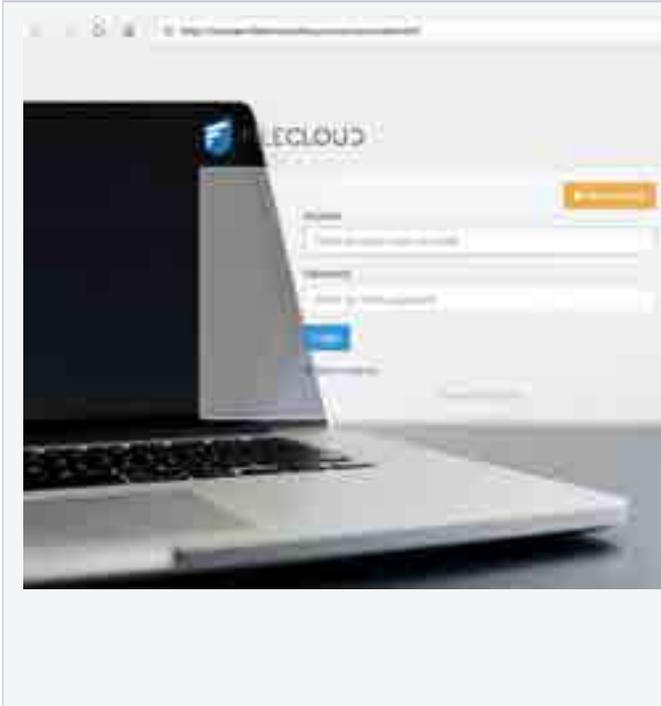
Limited Access accounts can only be local user accounts.

# Web Browser (User Portal)



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

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



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



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



**Account:** You can log in a few different ways:

- Your Admin will provide you this name
- You might have permissions to create a new account yourself for the first time
- You might be able to use the same name as your Organizational Login



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

- Provided by your Admin when your account was created
- Created by you if you created your own account
- The same as your Organizational Login Password

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

*What's on this page?*

- *Typing in your account information*
- *Creating a new account*
- *Log in with two-factor authentication*
- *Reset a forgotten password*

➔ [Log In](#)

*What's on this page?*

- *Adding Files*
- *Managing Files*
- *Finding Your Files*

➔ [Basic Folder Operations](#)

*What's on this page?*

- *Places in the User Portal*
- *Preview a File in the User Portal*
- *View Files in the User Portal*
- *Monitor File Activity*
- *View Metadata for a File*
- *View Recent Files and Activities*

➔ [Take a Tour](#)

*What's on this page?*

- *Add to Favorites*
- *View Photo Gallery*
- *Playing Audio*
- *View Previous Versions Of Files*
- *Activity Stream*
- *File Locking*
- *Recovering Space*
- *Set Folder Level Permissions*
- *Creating a Direct Link*
- *Adding Metadata*

## [Advanced Folder Operations](#)

What's on this page?

- *Add a Profile Image*
- *Change your password*
- *View your Account Name*
- *View Your Display Name*
- *View Your Disk Usage*
- *Change Your Display Language*
- *Manage Your Email Settings*
- *Manage your Devices*

## [Manage Your Account Settings](#)

What's on this page?

- *File Issues FAQ*

## [Troubleshooting File Issues](#)

# Logging In to the User Portal



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

Your administrator must provide you with 3 piece of information to access your FileCloud:



**FileCloud URL:** The URL to your site. For example: <https://myFileCloudTeamSite.FileCloud.com>



**Account:** You can log in a few different ways:

- Your Admin will provide you this name
- You might have permissions to create a new account yourself for the first time
- You might be able to use the same name as your Organizational Login



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

- Provided by your Admin when your account was created
- Created by you if you created your own account
- The same as your Organizational Login Password

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

When you access the URL, you will see a login screen.

## Other Log In Options

➔ [Create a New Account](#)

 [Log in Using Two-Factor Authentication](#)

 [Reset a Forgotten Password](#)

# Creating A New User Account

FileCloud supports the ability for you to create your own user account.

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

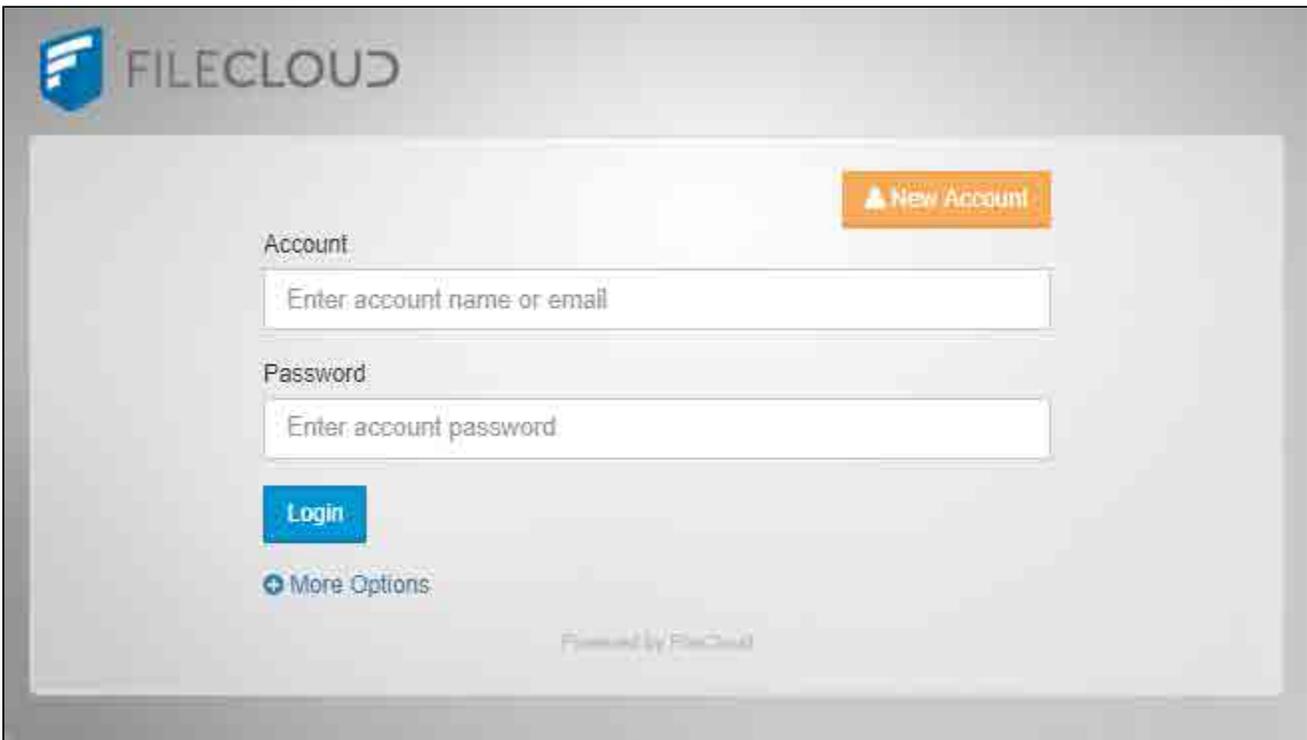
If your account requires admin approval first:



You will be notified by email when:

- Trying to connect (Admin approval pending)
- When the administrator has approved the device you are trying to connect with

Figure 1. The Login Screen for the User Portal



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

To create a new User account:

1. Open a Web browser.
2. Type in the URL provided by your Administrator. For example, <https://<yourteamname>.filecloudonline.com>
3. Click the *New Account* button.
4. In *Language*, select the option of your choice.
5. In *Account Name*, type in a string of character and then click the Check button.
6. In *Password* and *Repeat Password*, type in the same string of characters.
7. In *Email*, type in the address where you want to receive notifications about FileCloud issues.
8. Next to *I agree to Terms of Use*, select the checkbox.
9. To create your account, click *Create*.

Figure 2. Create New User Account Window

### Create New Account

Language

english

Account Name

Enter name

Check Q

Password

Enter account password

Repeat Password

Re-enter account password

Email

Enter email id

I agree to Terms of Use



Create

Cancel

[More Options](#)

# Log in Using Two-Factor Authentication



If your administrator has enabled Two Factor Authentication, then you will be required to enter additional code in order to proceed.

## Two Factor Authentication via email code delivery

If the two factor authentication is setup to use Email id, then you will receive a code to the email associated with the account. The code will be valid for 10 minutes.

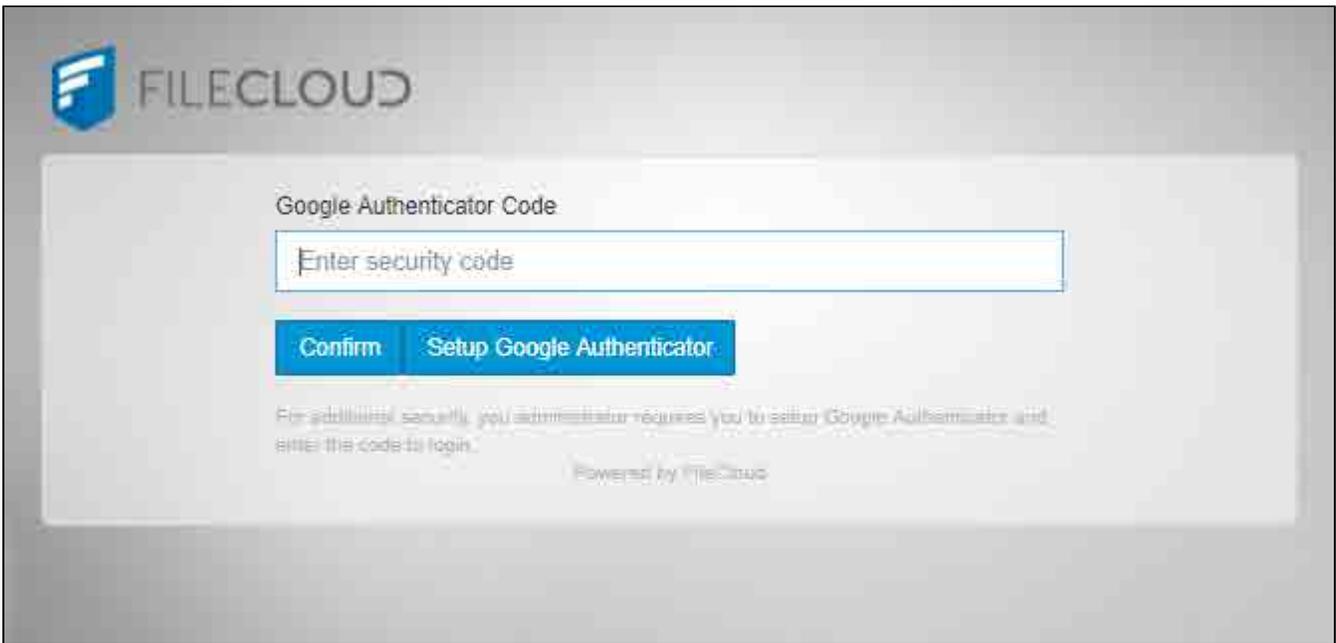
The screenshot shows the FileCloud login interface. At the top left is the FileCloud logo. Below it is a 'Security Code' section with a text input field containing the placeholder 'Enter security code'. Below the input field is a blue 'Confirm' button. Underneath the button, there is a small text note: 'For additional security, you need to enter the security code sent to your registered email id to login.' Below this note is a link labeled 'More Options' with a circular arrow icon. At the bottom center of the form area, it says 'Powered by FileCloud'.

## Two Factor Authentication with TOTP or DUO

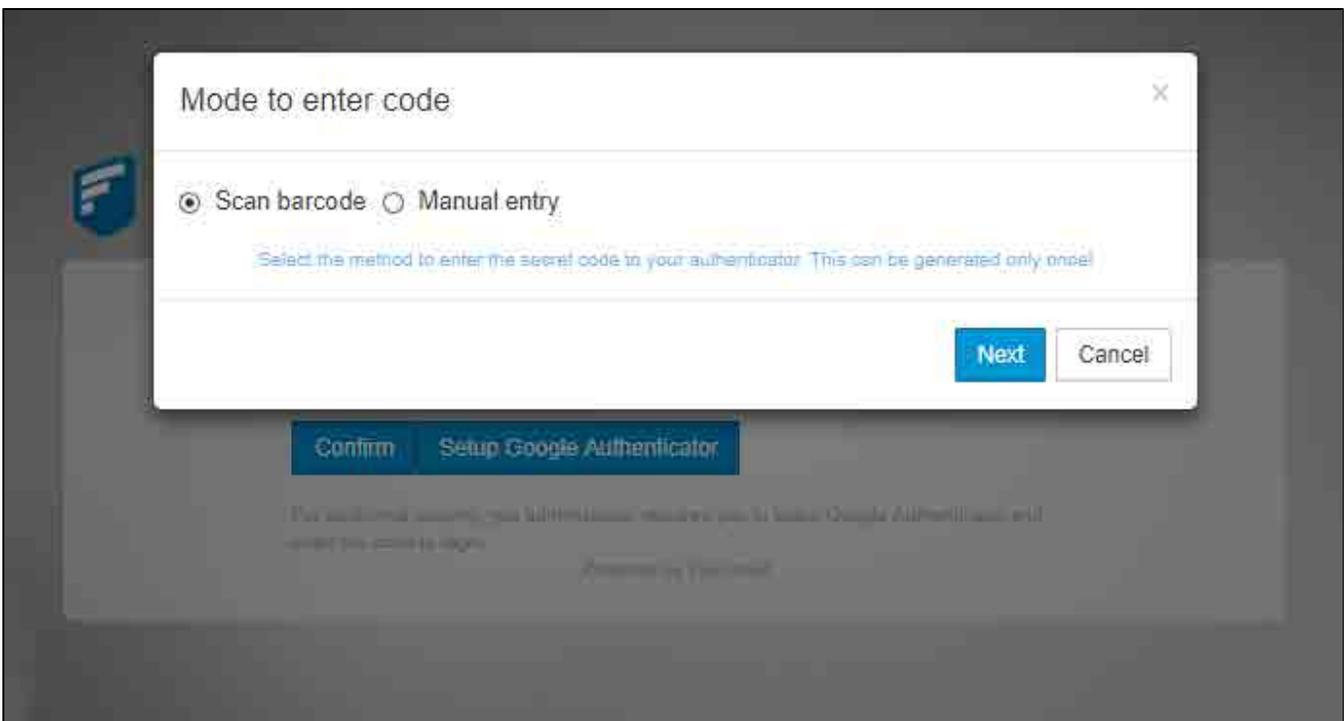
If two factor authentication is setup to Google Authenticator, then you will need to setup Google Authenticator for the first time.



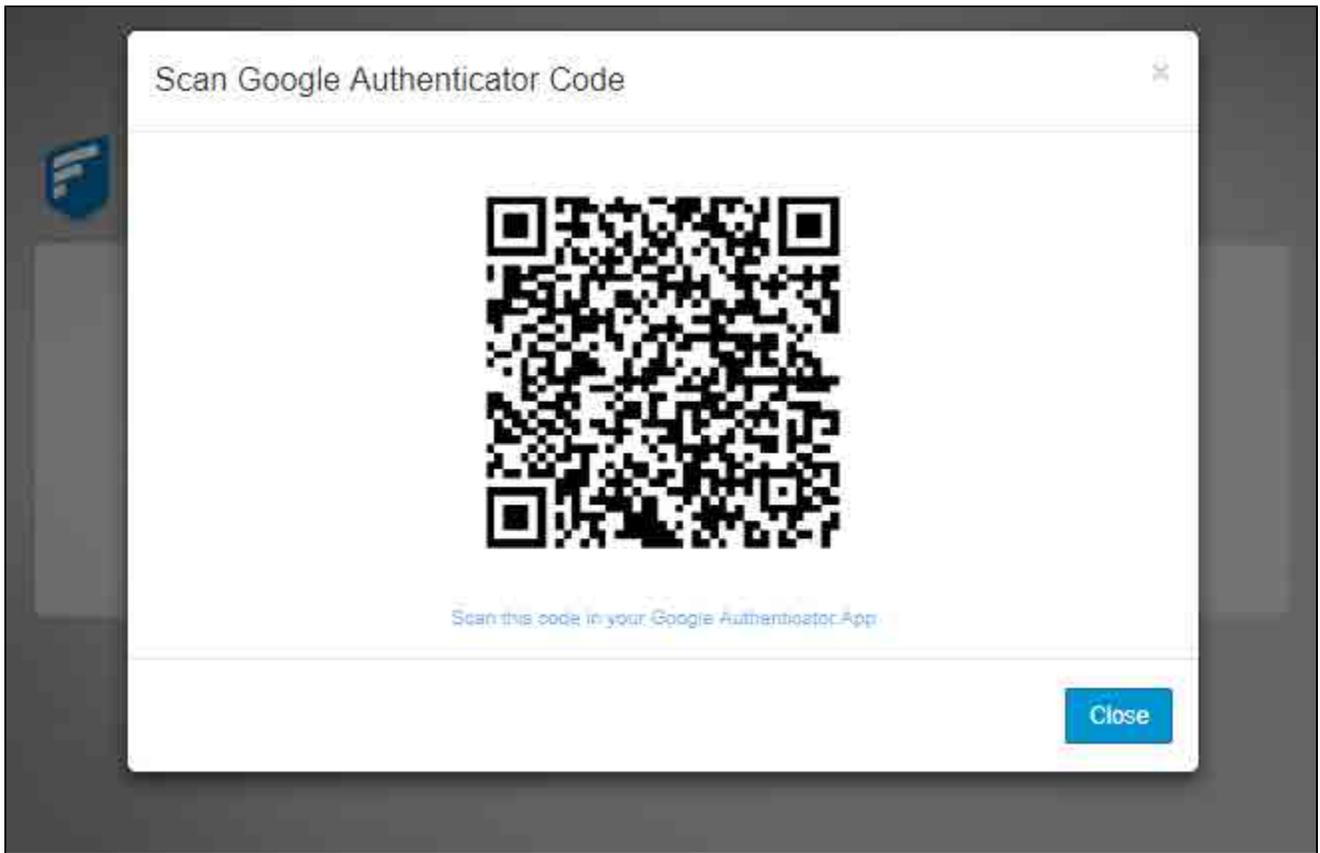
Note: Once the Google Authenticator is setup, it will no longer be shown. Only the Administrator can [reset the Google authenticator](#) setup.



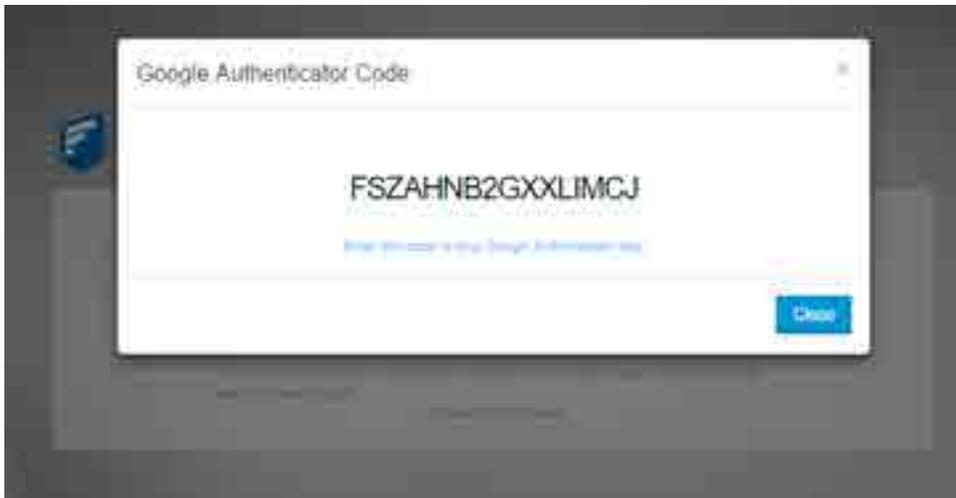
Download and install Google Authenticator App in your smart device and then Click on "Setup Google Authenticator" button



You can choose to scan the barcode (The Google Authenticator client will allow scanning barcode)



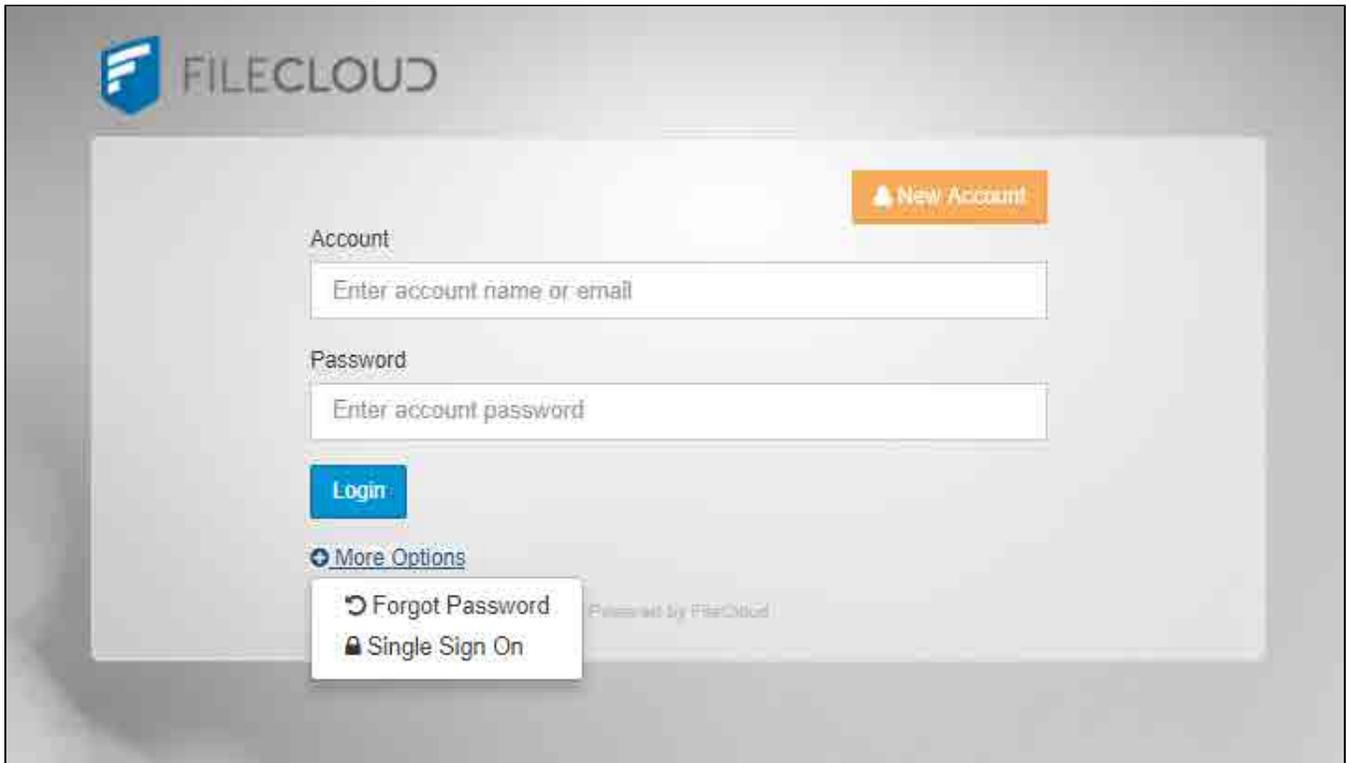
OR you can choose to enter the code manually



# Reset a Forgotten Password



In case you forgot your password to your FileCloud account, just click on the Forgot Password link and follow the steps.



# User Account Settings

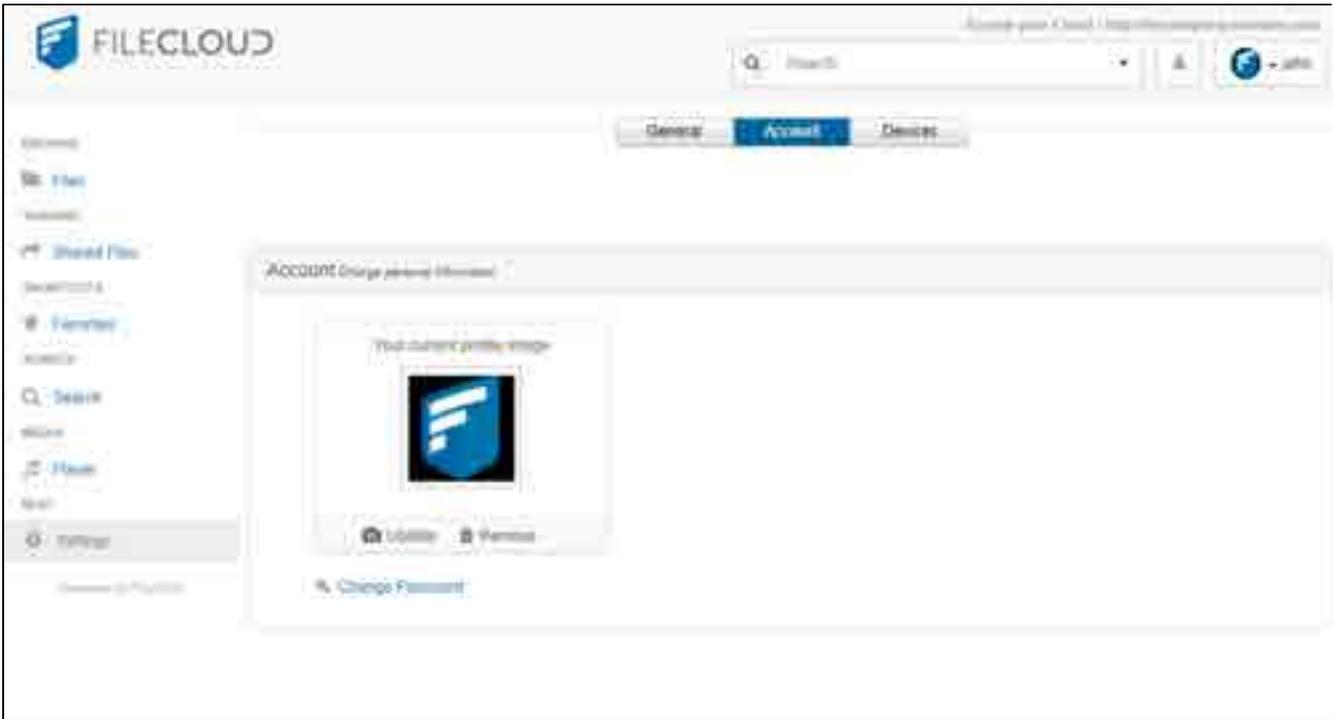


You can use the FileCloud User portal to configure your user account settings.

## What do you want to configure?

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

This page will provide support for Setting Profile Image.



### To set your profile image:

1. Open a web browser.
2. Log in to the User Portal.
3. In the left side navigation menu, click Settings.
4. From the tabs at the top of the screen, select Account.
5. In the Your Current Profile window, click Update.
6. Browse to find the picture you want to use, and then click Open.



Watch a video on how to add a profile picture.

A good security policy includes changing your password often.

**i** These instructions require you to know your old password.

If you have forgotten your password, to request it be reset:

1. Open a web browser.
2. Navigate to the User Portal URL.
3. On the Login screen, click More Options.
4. Select Forgot Password.
5. Go to your email Inbox where you receive FileCloud notifications.
6. Follow the instructions to reset your password.

**To change your password:**

1. Open a web browser.
2. Log in to the User Portal.
3. In the left side navigation menu, click *Settings*.
4. From the tabs at the top of the screen, select *Account*.
5. In the Account window, click *Change Password*.
6. On the Change Password screen, type in your Old Password, and then the same new password in New Password and Confirm Password.
7. To save your changes, click Submit.

Your Account name is used in the following places:

- The name you log in with
- In the File and Folder Details panel

🔒 Only an Administrator can change your Account Name.

**To view your account name:**

1. Open a web browser.
2. Log in to the User Portal.
3. In the left side navigation menu, click *Settings*.
4. From the tabs at the top of the screen, select *General*.
5. Look in the *Summary section*.

By default your Display Name is the same as your Account name and is used in the following places:

- Displayed on your User Dashboard

- On any FileCloud email notifications

 Only an Administrator can change your Display Name.

To view your display name:

1. Open a web browser.
2. Log in to the User Portal.
3. In the left side navigation menu, click *Settings*.
4. From the tabs at the top of the screen, select *General*.
5. Look in the *Summary* section.

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

To view your disk usage:

1. Open a web browser.
2. Log in to the User Portal.
3. In the left side navigation menu, click *Settings*.
4. From the tabs at the top of the screen, select *General*.
5. Look in the *Disk Usage* section.

If you change this setting, it will display all screens in the User Portal with the selected language.

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



To change your display language:

1. Open a web browser.
2. Log in to the User Portal.
3. In the left side navigation menu, click *Settings*.
4. From the tabs at the top of the screen, select *General*.
5. In the *Language* section, under Change the Language, to refresh the screen in another language, use the dropdown menu to select an available language.

In the User portal you can:

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



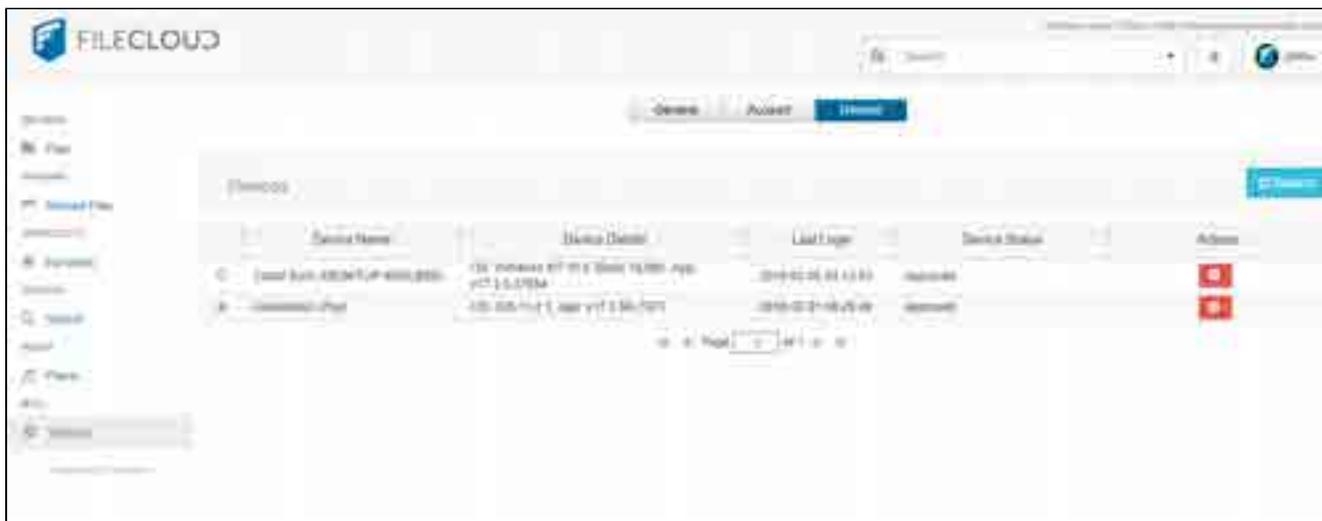
To Unsubscribe from the mailing list:

1. Open a web browser.
2. Log in to the User Portal.
3. In the left side navigation menu, click *Settings*.
4. From the tabs at the top of the screen, select *Account*.
5. In the Account window, click *Unsubscribe from mailing list*.

This page provides options to manage your connected devices and remove them if needed.

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

- FileCloud iOS App
- FileCloud Android App
- FileCloud Windows Store App
- FileCloud Sync
- FileCloud Drive
- FC Outlook AddIn
- FC Office AddIn



To manage your devices:

1. Open a web browser.
2. Log in to the User Portal.
3. In the left side navigation menu, click *Settings*.
4. From the tabs at the top of the screen, select *Devices*.

# The User Portal

 The User Portal is available in FileCloud Server version 15 and later.

 To take the tour you must be logged in. Not logged In? *Click below.*

 [Logging In to the User Portal](#)



The User Portal is where you manage all of your FileCloud files and share knowledge between colleagues and teams.

## [Places in the User Portal](#)

*What's on this page?*

- *The User Dashboard is where you manage all of your FileCloud files*

## [Previews of a File](#)

*What's on this page?*

- *Which types of files can I preview?*
- *How can I use the DICOM images in preview?*

## [View Files in the User Portal](#)

*What's on this page?*

- *How are files organized?*

## [Monitor File Activity](#)

*What's on this page?*

- *Where is the activity stream?*
- *Can I disable the Activity stream?*

## [View Metadata for a File](#)

*What's on this page?*

- *Metadata Terms*
- *Rules About Inheritance*
- *View the Metadata*

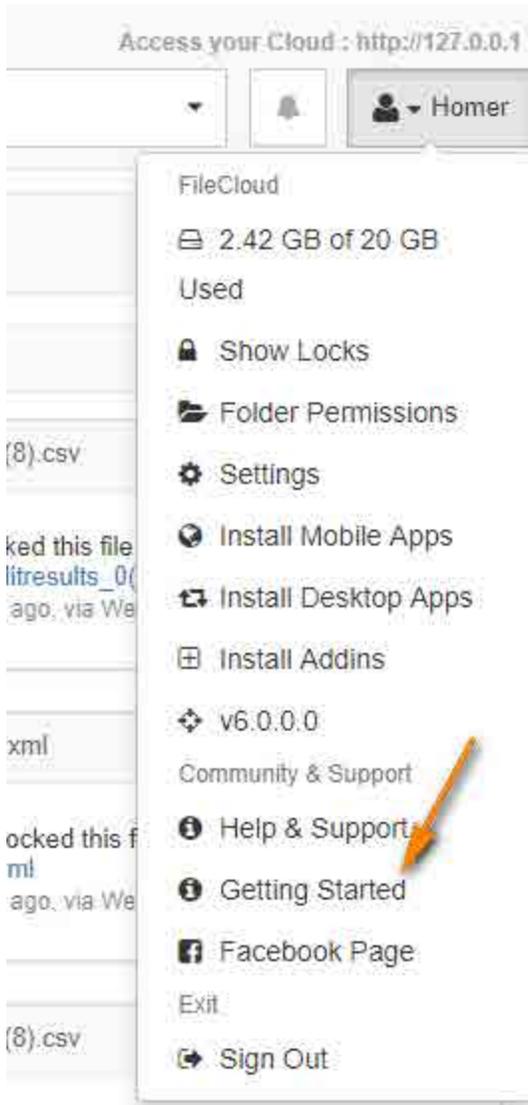
## [View Recent Files and Activities](#)

*What's on this page?*

- *Recent files section*
- *Activities section*

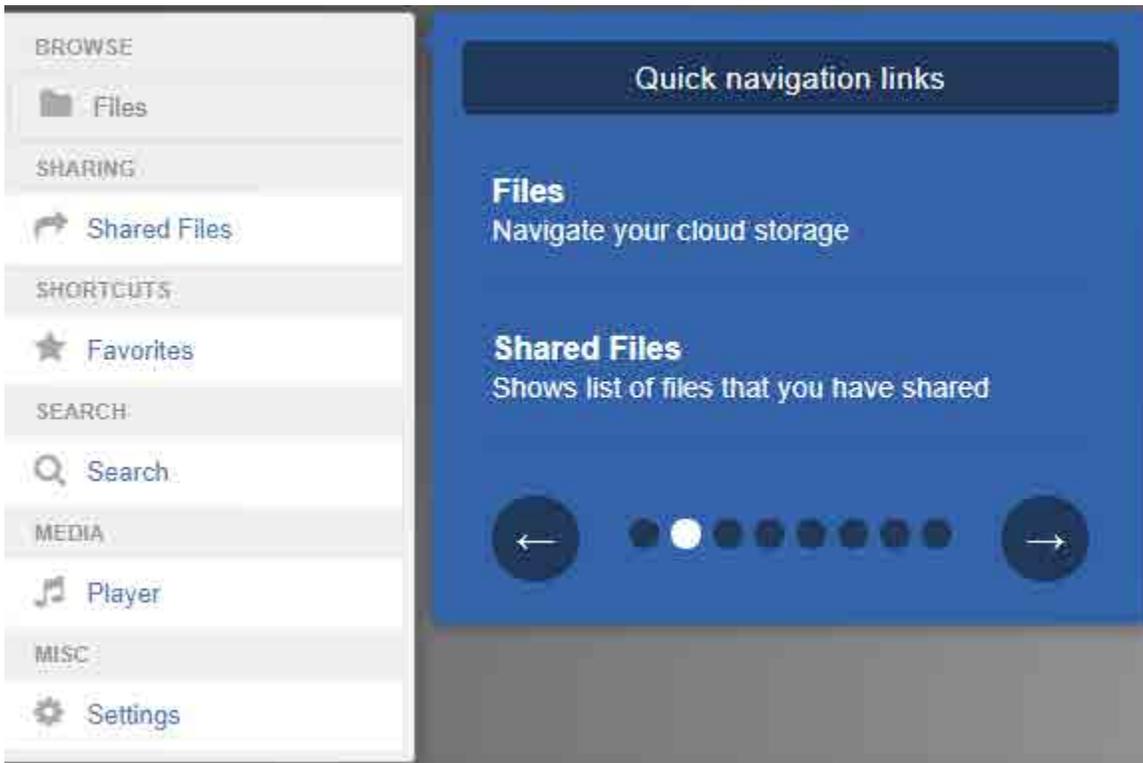
# Getting Started with the User Portal

When the user logs in for the first time into FileCloud, the user is taken through a series of quick help screens that displays the different areas of dashboard and other important aspects of FileCloud from user interface. The getting started screens are displayed only once for the user and is not displayed on the subsequent logins. However, the getting started screens can be started on on demand from the user dashboard using the link as shown below.

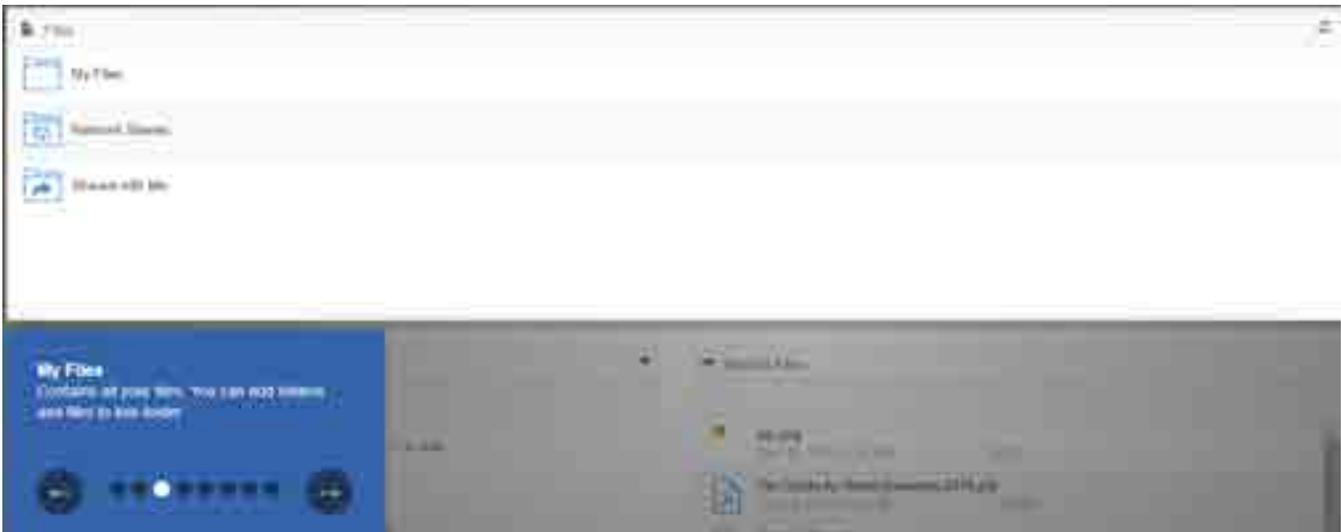


The user is taken through the following quick help screens when getting started is activated.

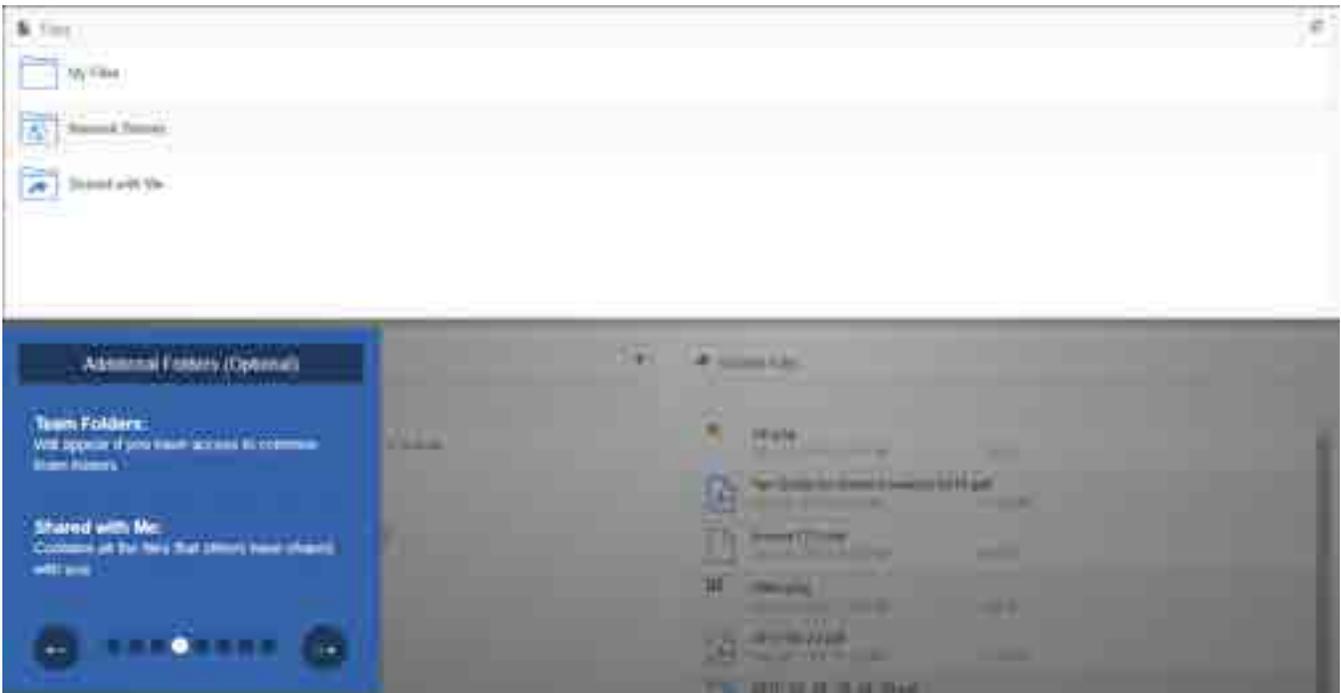
## Quick Navigation Links



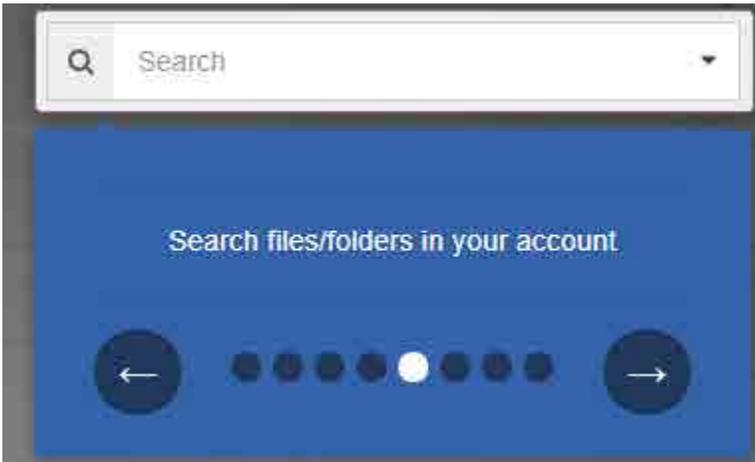
## My Files



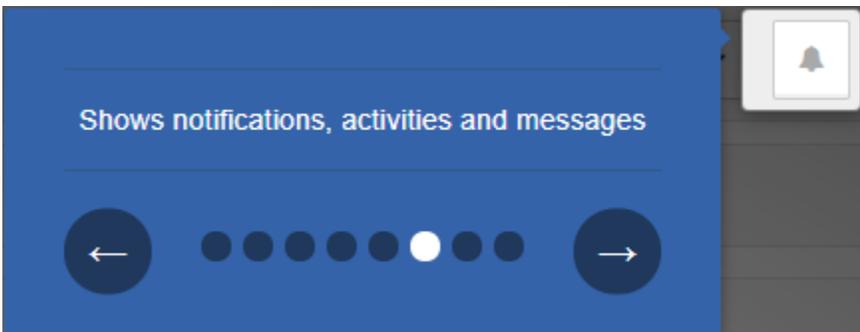
## Team Folders and Shared with Me (Optional)



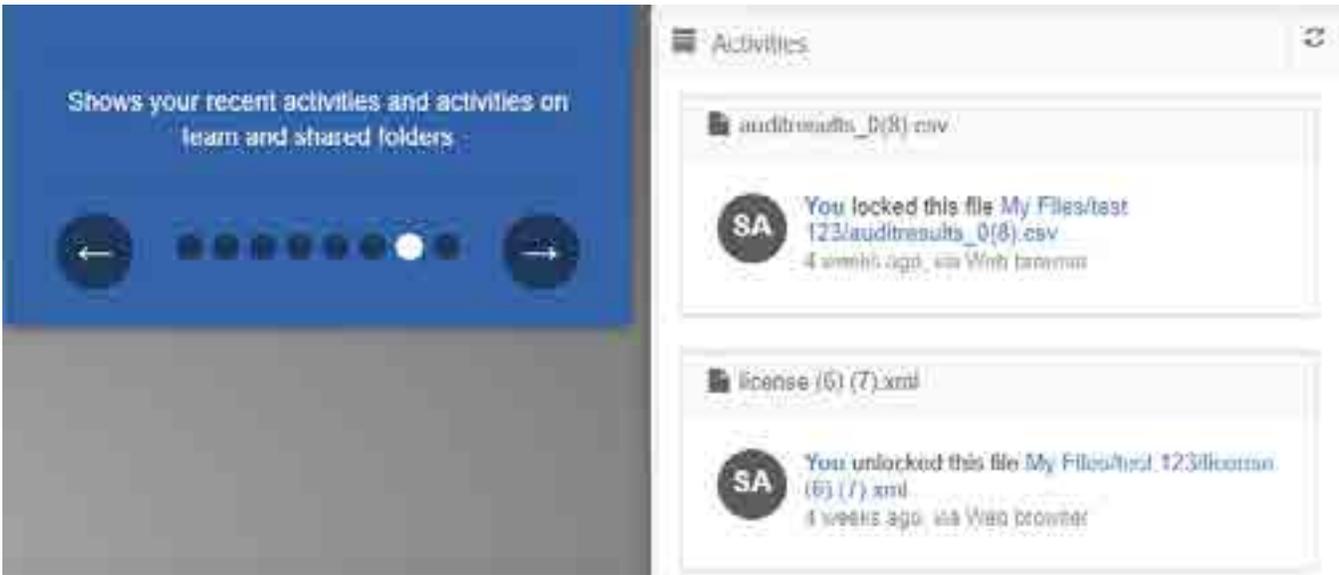
### Search Files and Folders



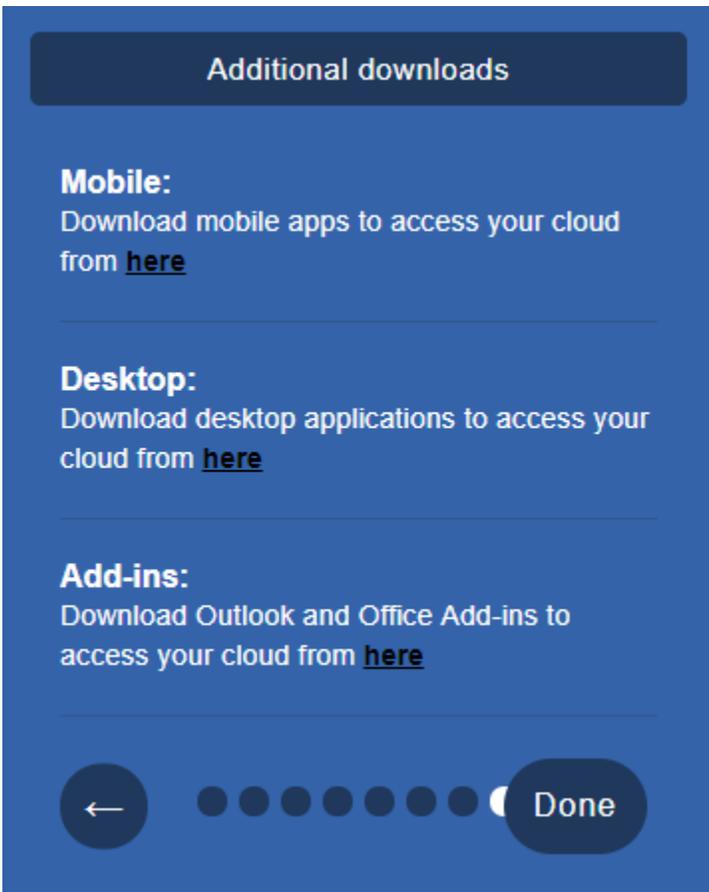
### Show Notifications, Activities and Messages



## Recent Activities



## Additional Downloads





# Monitor Files in the User Dashboard



The Activity Stream and Comments are available in FileCloud Server version 8.0 and later.

The User dashboard is available in FileCloud Server version 15 and later.

The Activity Stream and comments allow you to monitor your files in the Dashboard.



How Do I [Access the User Dashboard?](#)

## Where is the activity stream?

You can monitor file activity to see when changes and actions are happening to a file and folder in the Activity Stream.

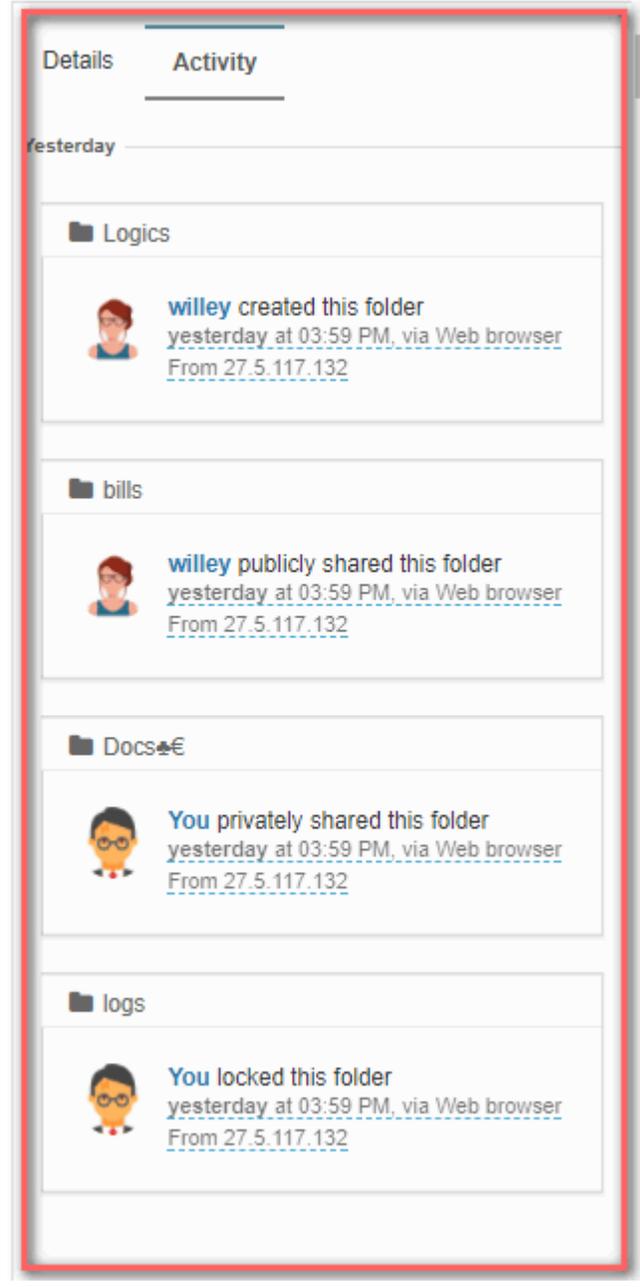
- This is useful when multiple people work on the same set of files.



The activity stream has to be enabled by your Administrator.

Once the activity stream is enabled, the actions performed on a file or folder are tracked and displayed in the User Portal.

The Activity panel for a folder.



In FileCloud version 17.3 and later, the Activity stream will also show the Geo Location information.



## Can I disable the Activity stream?

If you don't want to see additional information about a file or folder, you can disable the Additional information panel, which contains both the Activity and the Details.

To toggle the Activity and Details panel:

1. Log in to the User portal.
2. On the User Dashboard, from the left side navigation panel, select *Files*.

3. On the top right side of the screen, toggle the additional information panels by clicking the information button



# Places in the User Dashboard

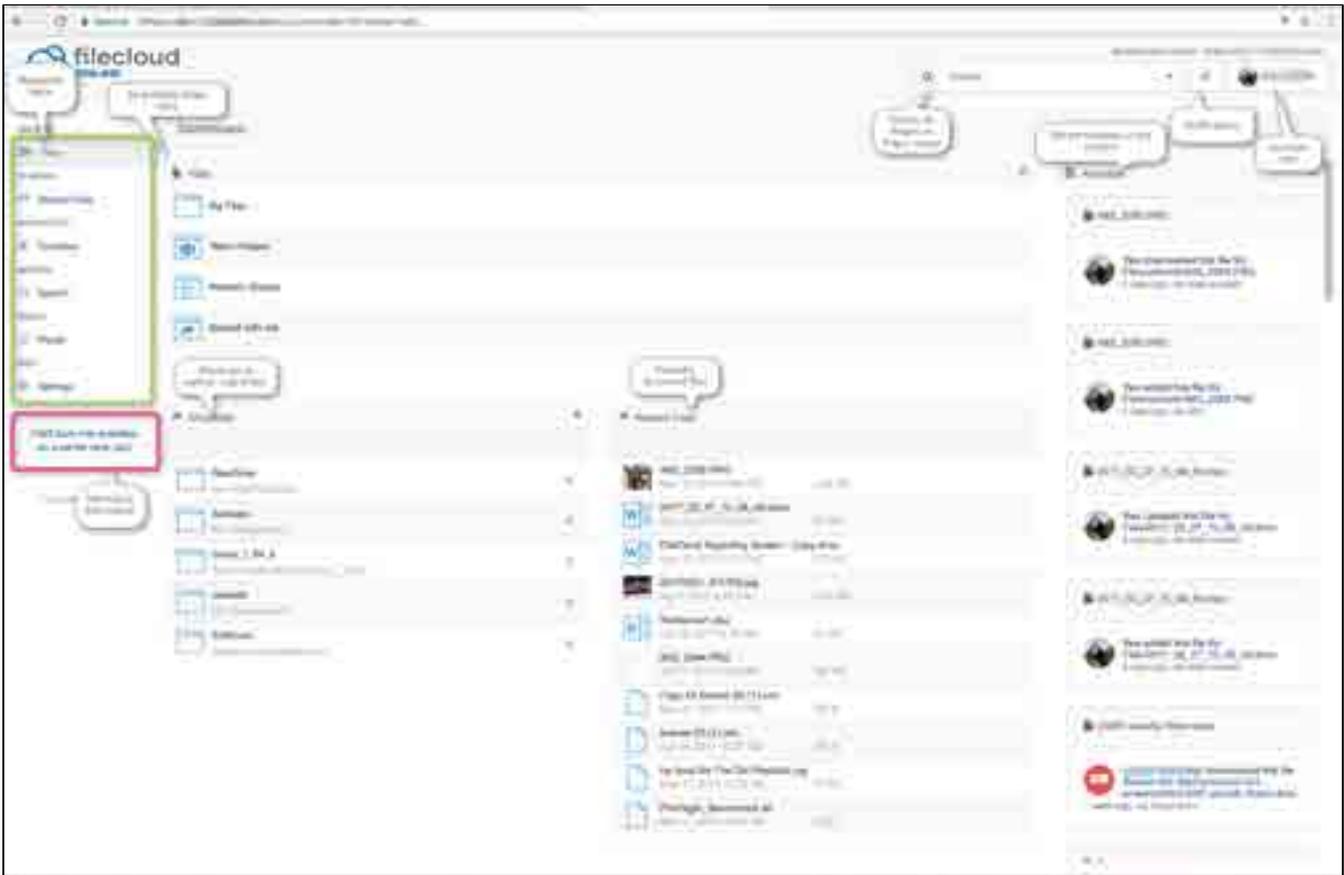
 The User dashboard is available in FileCloud Server version 15 and later.

The User Dashboard is where you manage all of your FileCloud files and share knowledge between colleagues and teams.

 How Do I [Access the User Dashboard?](#)



Figure 1. The User Dashboard



# Preview a File in the User Dashboard



The User Dashboard is where you can see a document preview.

➔ How Do I [Access the User Dashboard](#)?

You can quickly see if a file is the one you want before opening it for editing.



If you do not see the [Preview](#) button on your dashboard, contact your Administrator.

➔ If you are an administrator, enable [Document Preview](#).

1. After selecting a file in the User Portal, a [Preview](#) button is available.



2. After clicking the [Preview](#) button, a separate window opens showing an image of the file.

This preview image cannot be edited.



Document preview allows you to view the following document types directly in the User Portal via your web browser:

	Extension	Registered To	Available in FileCloud Server Version	Description

	.AI	Adobe	18.2	An Adobe Illustrator format is a proprietary file format developed by Adobe Systems for representing single-page vector-based drawings in either the EPS or PDF formats.
	.DICOM	DICOM	18.2	Medical files such as X-rays, CT scans, Ultrasounds and MRIs.
	.DOC	Microsoft	4.0	Microsoft WORD files created in versions 2003 and earlier.
	.DOCX	Microsoft	4.0	Microsoft WORD files created in versions 2007 and later.
	.PDF	Adobe	4.0	Portable Document Format (PDF) is a file format used to present documents in a manner independent of application software, hardware, and operating systems. Each PDF file encapsulates a complete description of a fixed-layout flat document, including the text, fonts, graphics, and other information needed to display it.
	.PPT	Microsoft	4.0	Microsoft PowerPoint files created in versions 2003 and earlier.
	.PPTX	Microsoft	4.0	Microsoft PowerPoint files created in versions 2007 and later.
	.PSD	Adobe	18.2	 Java 10 and above is required for PSD viewing.  A .PSD file is a layered image file used in Adobe PhotoShop. PSD, which stands for Photoshop Document, is the default format that Photoshop uses for saving data. PSD is a proprietary file that allows the user to work with the images' individual layers even after the file has been saved.
	.XLS	Microsoft	4.0	Microsoft Excel files created in versions 2003 and earlier.
	.XLSX	Microsoft	4.0	Microsoft Excel files created in versions 2007 and later.

For everything besides the DICOM files, FileCloud Server uses LibreOffice to do the document conversion so that you can see the preview.

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

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

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

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

These options are only available for .DICOM image types.

# Set Permissions on Folders in the User Dashboard



Folders are the way your files are organized on the User Dashboard.

- Folder-level permissions can be used to allow or restrict access to a single folder and all of its contents.
- Folder-level permissions can only be set on the folders in [My Files](#).



[My Files](#) is your private store.

- Your administrator must first allow you to set folder-level permissions.
- If your administrator has granted you the ability to set permissions, you will see a [Manage Security](#) button when opening a folder in the right-side pane of User Dashboard.
- If your administrator has NOT granted you the ability to set permissions, you can [Share the folder](#) to grant or restrict access.

## Securing a folder

- Setting folder-level permissions is more commonly used to secure one entire folder with access to only a small number of users
- The permissions granted are applied to all of the files inside the folder and cannot be set for just a specific file inside the folder
- You can allow or restrict sharing

## Sharing a folder

- Sharing a folder is more about allowing a larger number of users to easily access your folders
- Access can be granted to anyone with the Share URL
- Sharing can also be used to provide access to a specific single file

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

Inherited permissions means that a parent's permissions are used for all the sub-folders too.

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

- The child, or sub-folder has all of the same **permissions** as its parent folder
- The child, or sub-**folder** has all of the same **permissions** as its parent folder, plus additional **permissions**
- The child, or sub-**folder** has all of the same permissions as its parent, minus additional **permissions**
- **The child, or sub-folder's permissions are not connected in any way to the parent folder and the sub-folder retains a separate set of permissions**

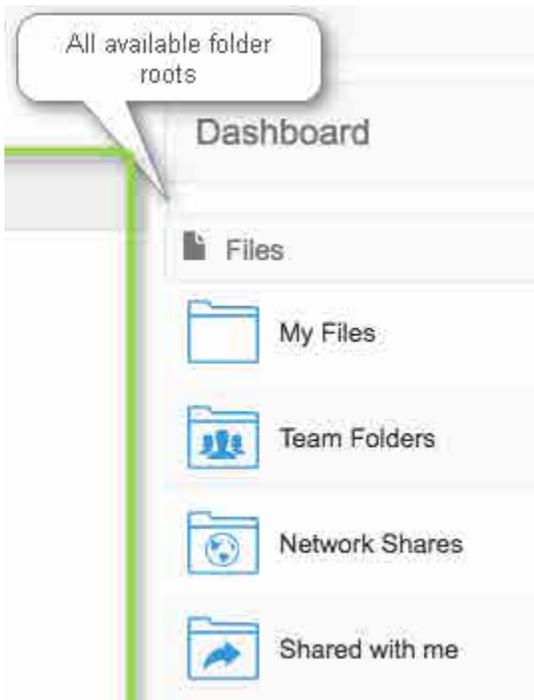
When setting folder-level permissions in FileCloud, you have the following options:

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

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

Read	Write	Delete	Share	Manage
<ul style="list-style-type: none"><li>• Allows downloading</li><li>• Allows previewing</li></ul>	<ul style="list-style-type: none"><li>• Allows uploading and modifying</li><li>• Allows creating files and folders</li><li>• Allows renaming</li></ul>	Allows deleting	Allows sharing	Allows managing folder-level permissions

How do I secure access to my folders?

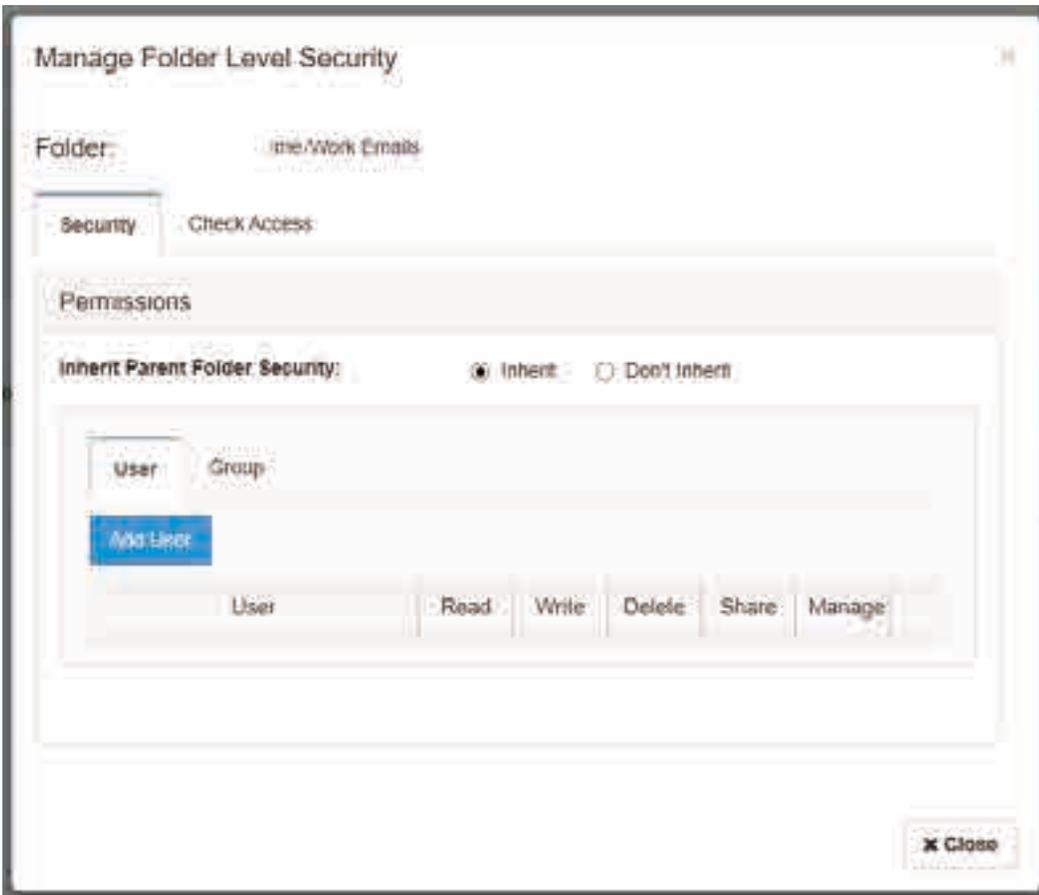


To set folder-level permissions:

1. Open a browser and log in to the [User Portal](#).
2. On the Home page of the User dashboard, click [My Files](#).
3. On the [My Files](#) window, click a folder.



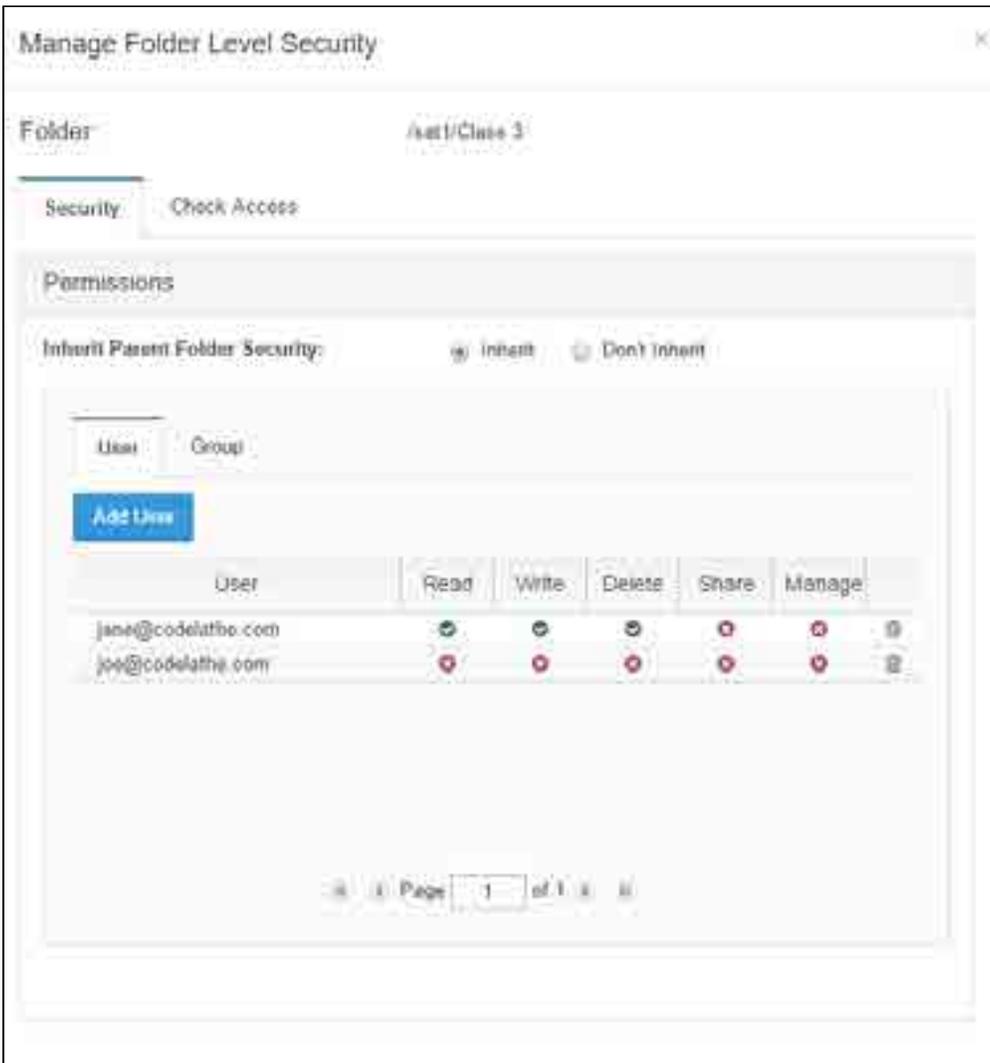
4. On the right-side of the folder details window, click the [Security](#) tab, and then click the [Manage Security](#) button.



5. In the Manage Folder Level Security window, decide if you want all sub-folders to have the same permissions by selecting either Inherit or Don't Inherit.
6. In the Manage Folder Level Security window, click Add User.



7. In the Search Users window, type in the email address of the user you want to allow access to your folder.
8. From the list of users, select the one you want to grant access.



9. By default, all permissions are granted. To restrict a permission, you must first restrict some of the previous permissions.

Permissions must be set in the following order:

Read	<ol style="list-style-type: none"> <li>1. Restrict MANAGE</li> <li>2. Restrict SHARE</li> <li>3. Restrict DELETE</li> <li>4. Restrict WRITE</li> </ol>
Write	<ol style="list-style-type: none"> <li>1. Restrict MANAGE</li> <li>2. Restrict SHARE</li> <li>3. Restrict DELETE</li> </ol>
Delete	<ol style="list-style-type: none"> <li>1. Restrict MANAGE</li> </ol>
Share	<ol style="list-style-type: none"> <li>1. Restrict MANAGE</li> </ol>
Manage	Must be restricted first before anything else

10. To restrict any permissions, first restrict Manage by clicking its green check mark.

11. Now you can deny the permission to Delete or Share permissions by clicking their green check marks.

12. To restrict the Write permission, make sure the Manage, Delete, and Share permissions are first restricted.
13. To restrict the Read permission, make sure the Manage, Delete, Share, and Write permissions are first restricted.
14. To save your changes, click Close.

# Shortcuts in the User Dashboard

 The User dashboard is available in FileCloud Server version 15 and later.

The User Dashboard is where you manage all of your FileCloud files and share knowledge between colleagues and teams.

 How Do I [Access the User Dashboard?](#)



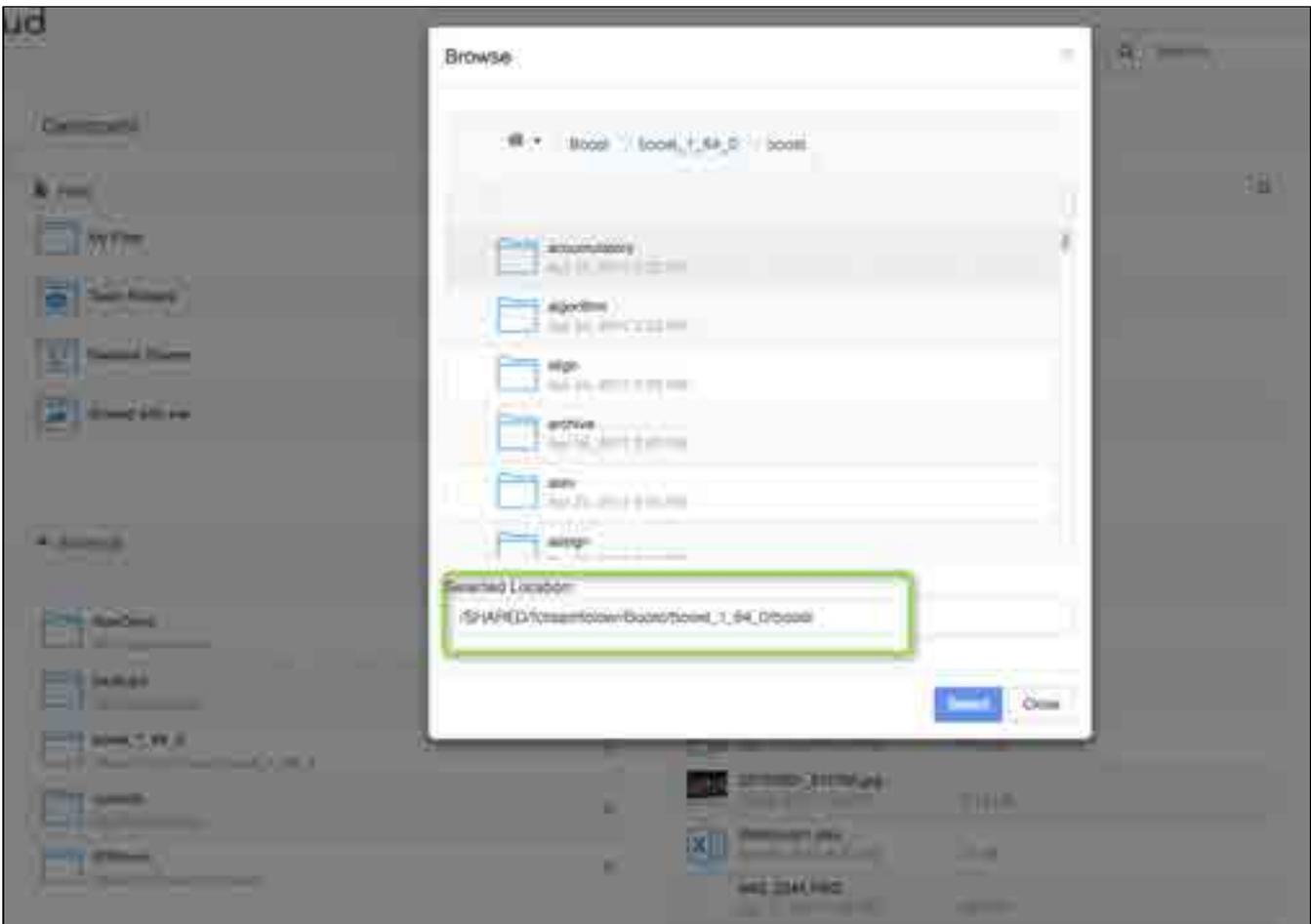
The shortcut section allows you to create a link to any path that you can access.

- You can create up to 10 shortcuts.
- This is **ONLY** available in the web browser.
- This option is not available in other clients such as mobile apps or FileCloud Drive.



To add new shortcut:

1. In the Shortcuts title bar, click plus button ( + ).
2. In the Browse window, navigate to the place where you want to create a link to.



# View Files in the User Dashboard

 The User dashboard is available in FileCloud Server version 15 and later.

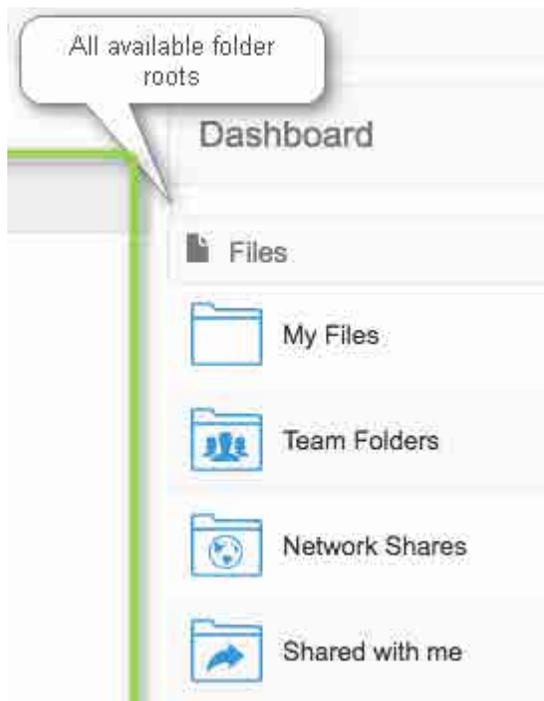
The User Dashboard is where you can view all of the files you have uploaded or have access to.

 [How Do I Access the User Dashboard?](#)

## How are files organized?

The Files section displays a list of all available data you can access.

Table 1. Folder Organization of Files

	<p> <b>My Files</b> is your private store. Your Administrator sets the amount of space you have to store files.</p> <p> <b>Team Folders</b> provide a single place where teams in a company can store and organize files and folders.</p> <ul style="list-style-type: none"><li>• Team folders are created and shared by your Administrator</li><li>• Once the team folder is shared with you, you will be able to see team folders under your account in<ul style="list-style-type: none"><li>• FileCloud User Portal</li><li>• FileCloud Sync</li><li>• FileCloud Drive</li><li>• Outlook and Office Add-Ins</li></ul></li><li>• You can invite other users to access files in the Team Folder</li><li>• Files that you upload to the Team folder do not count against your storage quota</li></ul> <p> <b>Network Shares</b> are special folders that allow you to access pre-existing files on your corporate Windows and/or Linux servers.</p> <ul style="list-style-type: none"><li>• These folders can be mounted in FileCloud and will appear as a location inside the Network Shares folder.</li><li>• FileCloud licensing doesn't allow adding Limited users to access network shares.</li><li>• To add limited users to a network share, a user with FULL access has to share the folder directly with the limited user. Administrators will receive an error if they try to grant access to Network Shares to a user with LIMITED access.</li></ul> <p>The "Shared with me" is the folder that contains all the folder <a href="#">shared by other FileCloud users</a>.</p>
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# Viewing Metadata

 Metadata support is available starting from FileCloud 18.1.

## What's on this page?

- [Metadata Terms](#)
- [Rules About Inheritance](#)
- [View the Metadata](#)



Metadata allows you to manage data that provides additional information about files and folders.

FileCloud defines two levels of metadata definition:

1. **Attribute** - defines a single piece of information that user can specify for file or folder.
2. **Metadata set** - a group of related attributes with additional properties and settings. It works as a container for attributes.

 Your Administrator must grant you permission before you can see the Metadata tab in the User Dashboard.

Ask your Administrator to grant you permission to access Metadata. Your administrator can grant the following types of permissions:

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

## Metadata Terms

Figure 1. Metadata Terms

 <p><b>File Object</b></p>	→	 <p><b>Metadata</b></p>	→	 <p><b>Attribute</b></p>	→	 <p><b>Metadata Set</b></p>	→	 <p><b>Tag</b></p>
<p>Every file and folder that exists in FileCloud.</p>		<p>Information about the file data.</p> <p>Describes files and folders available in the system.</p>		<p>A single piece of information that describes the File Object.</p> <p>In FileCloud attributes are defined as a part of the metadata set.</p>		<p>A set of metadata attributes that might be logically grouped and can be attached as a single entity to File Objects.</p>		<p>a special type of attribute (referred to as the Array attribute type) that allows users to provide multiple custom values for each File Object.</p>

For example:		For example:		For example:		For example, resumes will always have:		For example:
<ul style="list-style-type: none"> <li>• a resume</li> </ul>		<ul style="list-style-type: none"> <li>• Lives in the Human Resources Folder</li> <li>• Has a created date</li> <li>• Has a modified date</li> </ul>		<ul style="list-style-type: none"> <li>• the candidate's photo in their resume</li> </ul>		<ul style="list-style-type: none"> <li>• Photo</li> <li>• Name</li> <li>• Address</li> <li>• Experience</li> <li>• Education</li> </ul>		<p>HR wants to tag a resume status as:</p> <ul style="list-style-type: none"> <li>• Candidate</li> <li>• New Hire</li> <li>• OnBoarding</li> </ul>

## Rules About Inheritance

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

Operation	Rule
a new file or folder is created	a default metadata set is automatically attached to it with all attribute values populated with default values defined
a new file or folder is uploaded	a default metadata set is automatically attached to it with all attribute values populated with default values defined
a file or folder is copied	metadata values <b>are not</b> copied. The Default metadata set with default values will be added to the new File Object.
a file or folder is moved	associated metadata values are also moved. The metadata points to the original file or folder during its lifetime.
a file or folder is renamed	associated metadata values are also renamed. The metadata points to the original file or folder during its lifetime.
a file is removed and moved to the recycle bin	the associated metadata values are updated so they point to the file in the recycle bin.
a file is permanently removed from FileCloud Server	the associated metadata values are removed as well.

## View the Metadata for a File or Folder

Metadata Panel is available on the right hand side panel, next to Details and Activity Panels. It will only appear when both activity panel and metadata panel are enabled. Otherwise it will be hidden. This panel displays the following:-

- all metadata related information for the selected file or folder.
- a list of available metadata sets that can be added for the particular File Object.
- a list of associated metadata sets with corresponding attribute values.



# View Recent Files and Activities

 The User dashboard is available in FileCloud Server version 15 and later.

The User Dashboard is where you manage all of your FileCloud files and share knowledge between colleagues and teams.

 How Do I [Access the User Dashboard?](#)



These sections provide a quick way for you to access files you have been working with recently. They are like a temporary shortcut.

Recent Files	Activities
The Recent files section will contain the last 10 recently accessed files.	The Activities section shows the recent activities you have performed, as well as actions by other users in folders that were shared with you.  Actions such as: <ul style="list-style-type: none"><li>• File uploads</li><li>• Downloads</li><li>• Updates</li></ul>

### Recent Files

 september2015_denverobserver.pdf	sept 4, 2015 4:07 AM	2.01 MB
 CCD_EclipseParty.png	sep 4, 2015 4:02 AM	204 KB
 Celestron telescope Manual.pdf	Jul 9, 2015 4:07 AM	5.18 MB
 Click HERE to Download our best EVENING Star Map for June 2017.pdf.pdf	Apr 2, 2015 4:37 AM	1.13 MB
 Eclipse2017party.png	Apr 1, 2015 4:07 AM	207 KB
 FileCloudServerSyncSetup64.exe	Mar 26, 2015 11:77 AM	5.99 MB
 DICOM_Video.mp4	Nov 11, 2014 2:17 PM	41.28 MB

### Activities

 Eclipse2017party.png

**ME** You added this item [My Files/Astronomy/Eclipse2017party.png](#)

25 seconds ago, via Web browser from 24.197.99.39

 Astronomy

**ME** You created this item [My Files/Astronomy](#)

25 seconds ago, via Web browser from 24.197.99.39

 CCD\_EclipseParty.png

**ME** You added this item [My Files/Astronomy/CCD\\_EclipseParty.png](#)

25 seconds ago, via Web browser from 24.197.99.39

 september2015\_denverobserver.pdf

**ME** You publicly shared this item [My Files/Astronomy/september2015\\_denverobserver.pdf](#)

25 seconds ago, via Web browser from 24.197.99.39

 september2015\_denverobserver.pdf

# User Alerts

-  New features for alerts are available in FileCloud Server version 15 and later.
- The ability to unsubscribe from alerts is available in FileCloud Server version 17.3 and later.



As a user with a FileCloud Server account, you are automatically alerted when changes occur to your files. These notifications are provided in real-time

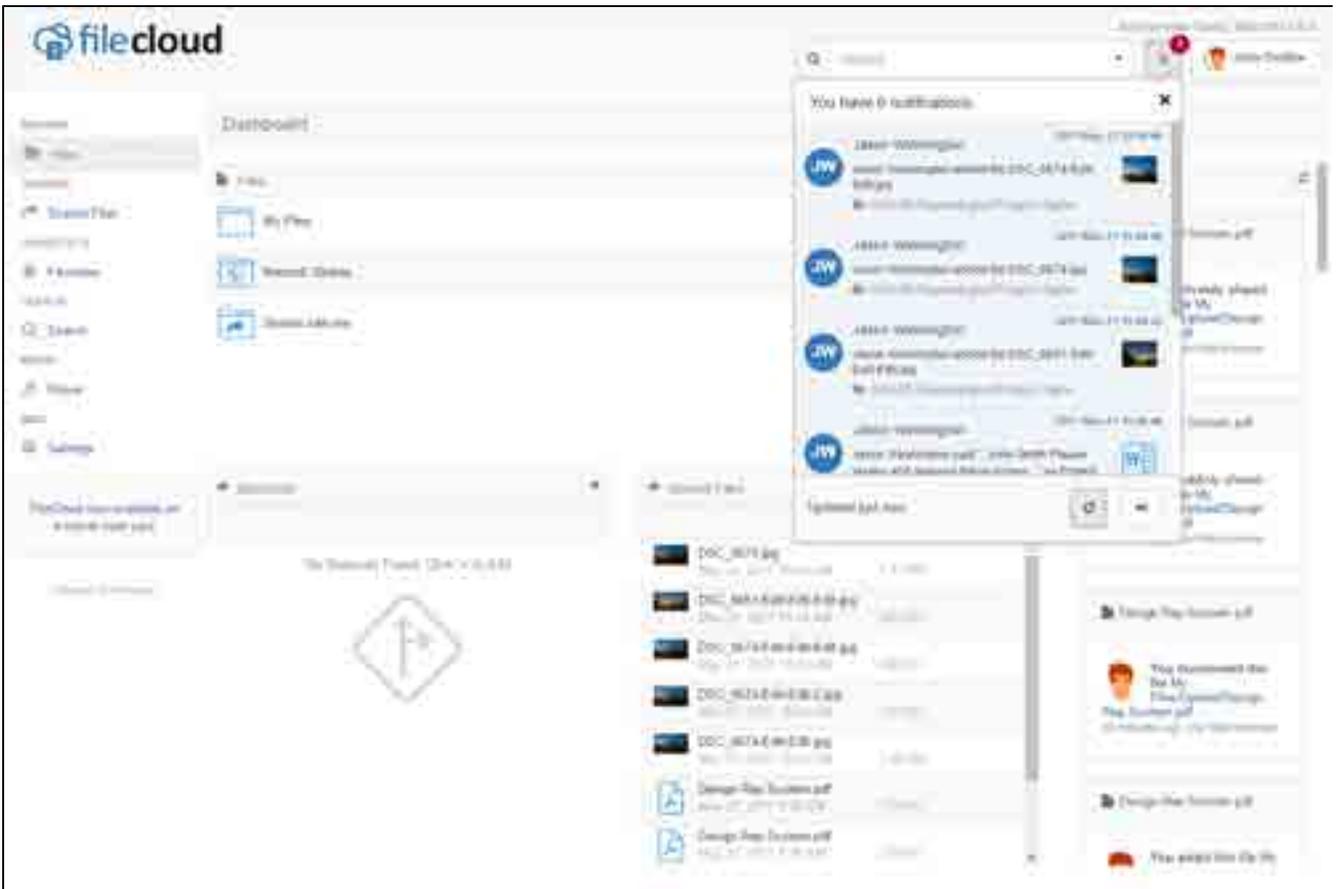
You will be notified when:

- You are identified in comments with @username
- Shared folder access changes
- System level alerts

## FAQs

- When you open a browser and log in to the User Portal, they are displayed on your dashboard.
- You will also receive an email message for each notification.

 Clicking on the "Bell" icon on the top right corner of the FileCloud User Portal will display the list of user alerts.



Yes, you can opt-out of the email notifications.

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



To unsubscribe:

1. Open a browser and log in to the *User Portal*.
2. From the left navigation panel, under *MISC*, click *Settings*.
3. Click the *Account* button.
4. Click the *Unsubscribe from mailing list* link.
5. On the confirmation dialog, click *OK*.
6. You will receive a message that you have been successfully unsubscribed.
7. Click *Close*.

# Basic Folder Operations

After logging in to the User Portal, the first thing to do is start uploading files.



Want to see a quick video of the folders on a dashboard?

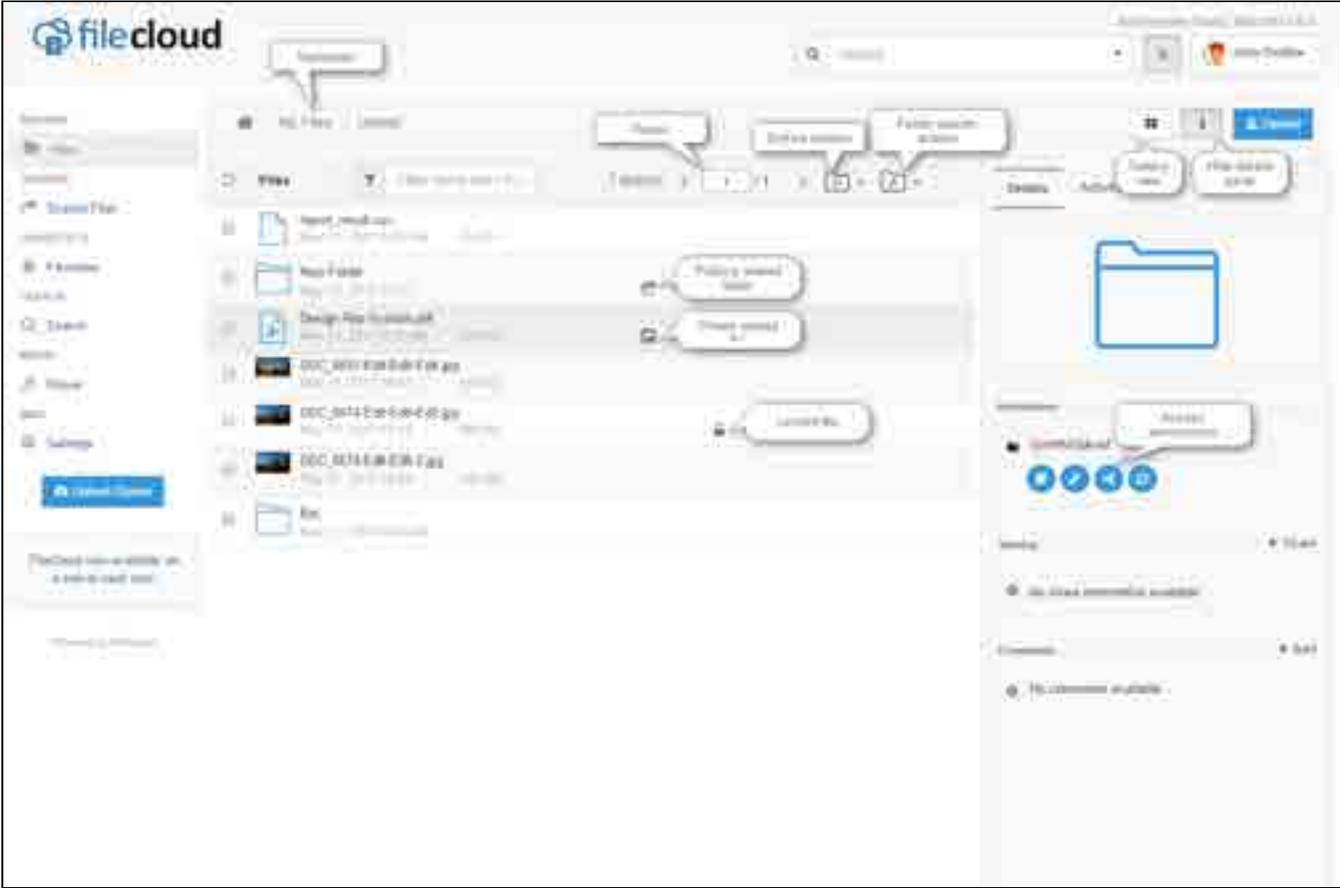


[Video of basic folder operations](#)

## What do you want to do?

 Add Files	<ul style="list-style-type: none"><li> <a href="#">Uploading Items</a></li><li> <a href="#">Creating a Folder</a></li><li> <a href="#">Copy Items</a></li><li> <a href="#">Move Items</a></li></ul>
 Manage files	<ul style="list-style-type: none"><li> <a href="#">Rename Items</a></li><li> <a href="#">Download Items</a></li><li> <a href="#">Delete Items</a></li><li> <a href="#">Recover Deleted Items</a></li><li> <a href="#">View Folder Properties</a></li><li> <a href="#">Add File and Folder Comments</a></li><li> <a href="#">Work with Email Files</a></li></ul>
 Find Your Files	<ul style="list-style-type: none"><li> <a href="#">Browsing Folders</a></li><li> <a href="#">Search</a></li><li> <a href="#">Using Filters in a Folder</a></li><li> <a href="#">Sorting Items in a Folder</a></li><li> <a href="#">Selecting Items in a Folder</a></li></ul>





# Create Folder

Select the "New Folder" or Press Ctrl+N to display the dialog and enter new folder name to create it.

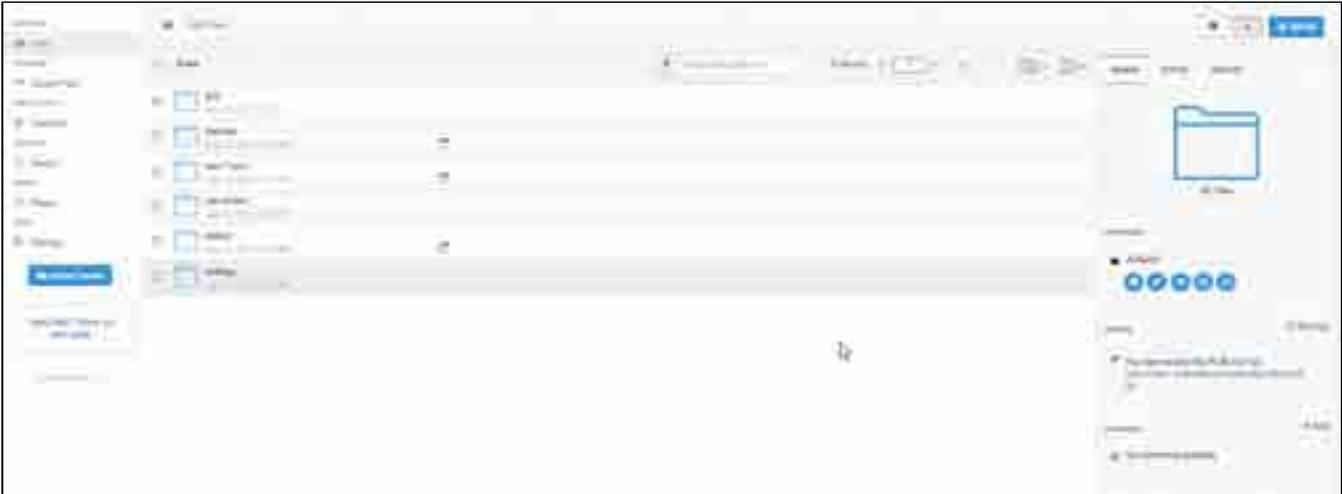


# Locating items in a folder

To quickly locate a file or folder, simply type in filename in the name in the "Filter Items" box (or Alt+F) to see all possible matches.



# Sorting items in a folder



sort items in a folder, select the sort drop down menu and select the appropriate criteria.

# Selecting items in a folder

## Selecting Single Item

Any item(file or folder) in the list view can be selected by clicking on the checkbox next to it or anywhere in the item row.

Right click to show the context menu or select the context menu from the top.



## Selecting Multiple Items

Multiple items(file or folder) in the list view can be selected by clicking on the checkbox next to each row or by clicking anywhere on each row by holding 'Ctrl + Click'.



# Copy Items

Select the file(s) or folder and then right-click and select copy. In the dialog box, navigate to the target folder, and click Select. The following video shows you the procedure.

Your browser does not support the HTML5 video element

# Move Items

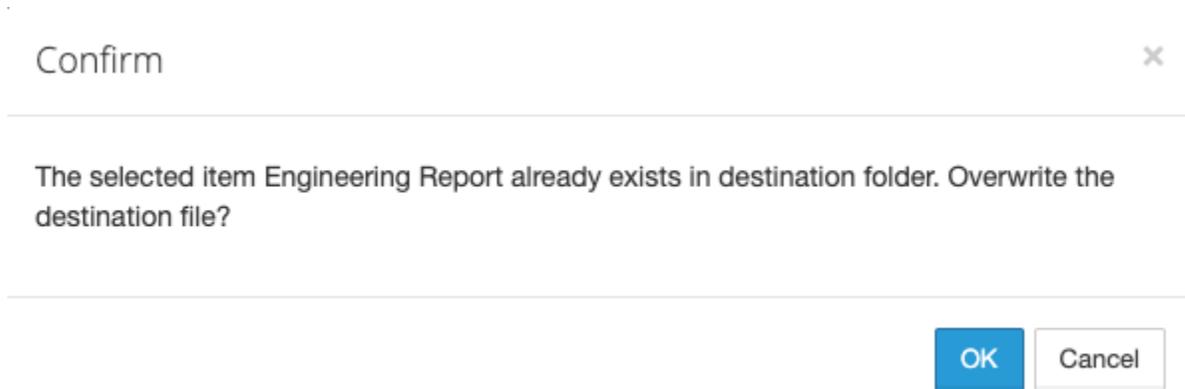
Select the file or folder to move, right click and select move. In the dialog box, navigate to the target folder and click "Paste". The file is moved, and the target folder is opened.

Play the following video to see the move procedure.

Your browser does not support the HTML5 video element

## Overwriting Items

If there are items in the destination with the same name as the moved files, then a dialog box prompts you to confirm overwriting the existing items. Click "OK" to overwrite existing items.



# Rename Item

Select the file or folder and select "Rename" from right click context menu or action set from the top or press Ctrl+R to enter new name to rename the item.



# Download Items

- [Download Single Item](#)
- [Download Multiple Items](#)
- [Download Folder](#)

## Download Single Item

Select a single file/folder and click "Download" in the context menu.



## Download Multiple Items

Select multiple items to download and click on the 'Download' button or right-click and select download. The selected items will be archived to a ZIP archive and downloaded.



## Download Folder

Navigate to the folder you want to download, tab on the Folder Action button at the right corner and select "Download Folder" or right-click and select download.

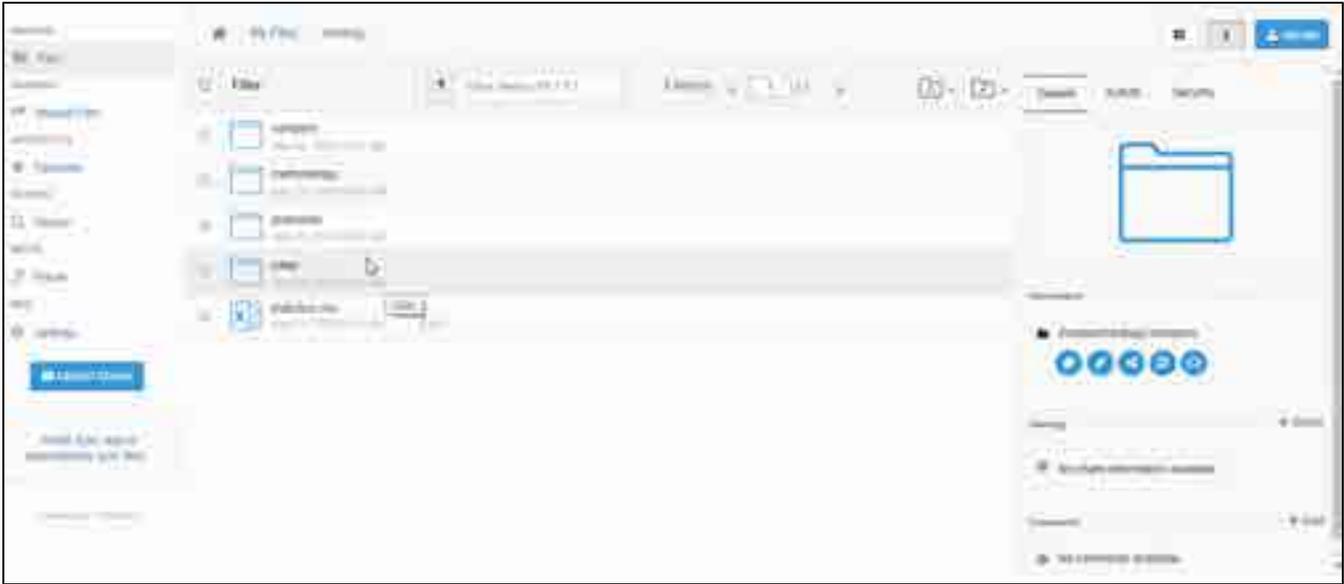


to

# Uploading Items

- [Uploading Files](#)
- [Uploading Folders](#)
- [Upload Queue and Viewing Upload Error](#)

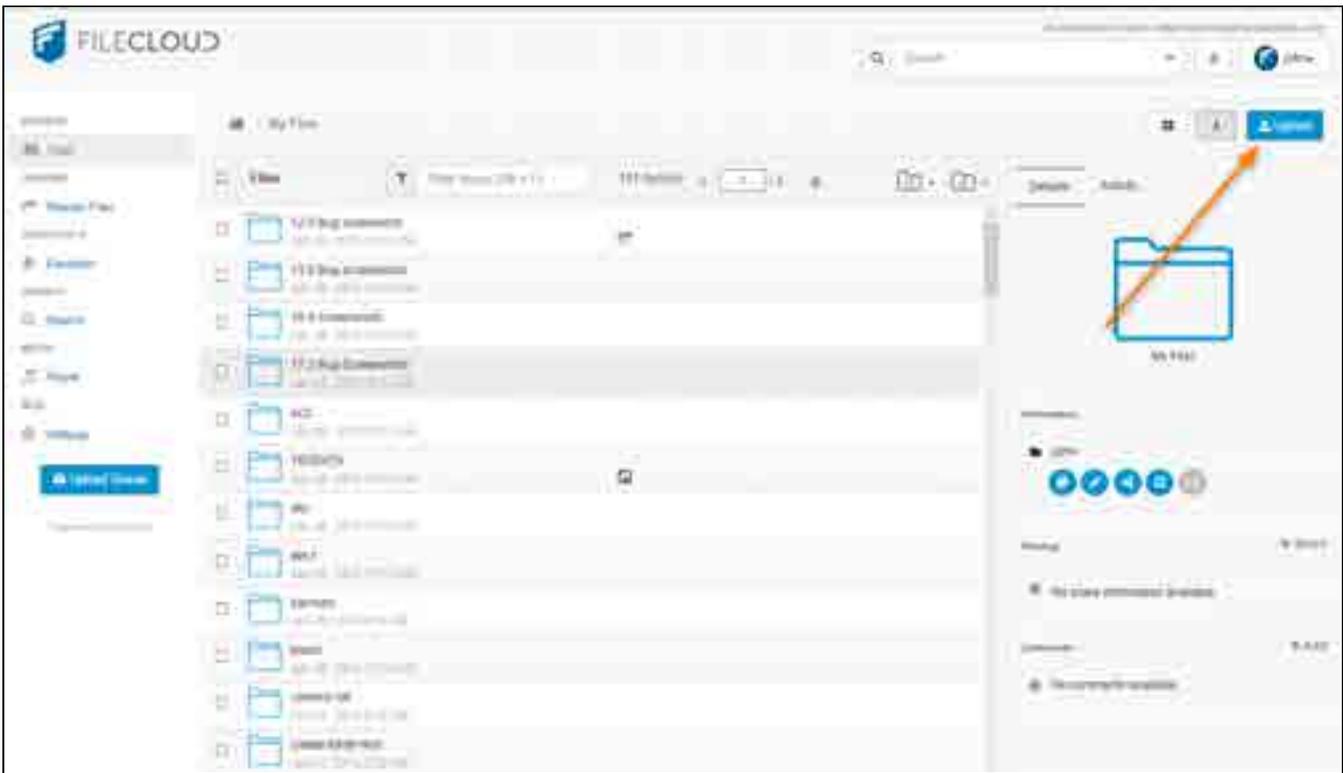
The easiest way to upload file or folder to FileCloud is by dragging and dropping the file or folder onto the FileCloud browser window



## Uploading Files

Users can upload files by either one of the two methods.

- You can navigate to any folder and click on the "Upload Icon" and select files to upload. You can select multiple files.
- You can also drag and drop files from your desktop into the FileCloud Web Browser window to upload the file.



**i** Starting with FileCloud 6.0, you can also drag-and-drop a folder with many files inside it into the FileCloud Web browser window to upload all the files quickly. This is only supported on Google Chrome.

## Uploading Folders

Users can also upload folders from the web browser. However, folder uploads are currently supported only by Chrome browser. When other browsers support folder uploads, FileCloud will also support it.

There are couple of ways to upload folders in the supported browser:

- Navigate to any folder, hold 'Ctrl' key and click on upload button. A folder chooser will be shown and any folder to be uploaded can be selected.
- Navigate to any folder, drag and drop any folder on to the browser.

## Upload Queue and Viewing Upload Error

The Uploader will show progress as well as any errors encountered during uploads. The queue can be closed and reopened by clicking the "Upload Queue" button

During the upload you can see the progress on the left panel.



# Delete Items

Select the file or folder and select the "Delete" from the context menu and accept the confirmation dialog to delete the file or folder.



# Recover Deleted Items

## Recover Deleted Items

If you had accidentally deleted file/folder, you can recover it from the deleted files link. The deleted files section acts as a recycle bin to store the files that are deleted. The administrator must have enabled this feature to send the deleted files to recycle bin if not the files will be permanently deleted. To recover the deleted files you can move cut from the deleted files and paste to the location where the file must be restored.

**Note:** Viewing the deleted files under My Files (Managed Storage) will display all the files and folders deleted from any location under My Files. Also, under the deleted files, the full path of the file where it was deleted will be stored. However, when viewing deleted files under Network Shares only files that were deleted from that particular network share folder will be displayed. In order to view the deleted files from a different network share folder, you must navigate to that network share folder and click the deleted files.



## Move, Copy, or Download the Deleted Items

When the deleted file/folder is found in the "Recycle Bin", users can move, copy or download directly from the list. Deleting items here will delete the item permanently and it will not be recoverable.



# Search

This page explains the new search functions available from FileCloud v15

The search function is now available to search across all available data sources in FileCloud such as Managed Storage, Lan based Network Shares, S3 Based Network shares.

Starting from Filecloud v17.3 Public shares can also be searched.



## Basic Search

Search box is displayed on top of the any view where search is supported. To search, simply enter the search term in the search box and press enter. The search will be performed on the current folder and sub folder

Search is case insensitive and by default, filename and content will be searched. This can be changed by using the drop down window

Search results will be cached for up to 3 months to take advantage of repeated searches as well as to reduce the server load. This can be configured by the administrator. The search results can be refreshed by tapping the "Search Again" link. Search will be stopped after more than 50 results are matched.

Any content search hits will have highlighted string that matched the search term.

 Note that in order to search for file contents, Please configure [content search](#) in the system.



## Search Options



### Metadata search

Starting from FileCloud version 18.1 new [metadata search](#) is available if enabled by administrator.



### Use cache results

Starting from FileCloud version 19.3 the [Use cache results](#) option is available.

Search parameters can be changed by using the drop down window of the search.

Click on drop down window to enter additional search options. The search feature also supports the ability to filter only files or folders.

### Advanced Search ✕

Term  ⓘ

Scope  All  Name Only  Content Only  Metadata

Search Type  All files/folders  Files Only  Folders Only

Path Selection  All  Selected

Selected Path  ⓘ

Date

Results Count  Limit 50  All

Use Cache

Results

## Metadata Search

In order to perform metadata search the metadata scope option has to be selected. When selected the Advanced search widget will change - only relevant options will remain visible. A new control appears - metadata conditions editor, which will popup when the Metadata Conditions folder icon is clicked.

Advanced Search

Metadata Conditions: There are 1 conditions defined

Scope:  All  Name Only  Content Only  Metadata

Path Selection:  All  Selected

Selected Path: <Select all elements>

Results Count:  Limit 50  All

Use Cache Results:

Clear Search

Metadata conditions generator is a widget that allows users to specify multiple metadata-related search conditions. The first dropdown displays the list of all accessible metadata set definitions, the second shows the list of all available attributes for the selected set. When attribute is selected an appropriate editor will be shown where users can provide a required value for the attribute. By clicking the Add button condition is added to the list of defined conditions. Clicking on the Apply button will pass the selected conditions to the search widget.

## Generate Metadata Condition



Assets

Category

Category

Add

Set	Attribute	Value	Actions
Assets	Banner Resolution	250x250	

Page 1 of 1

Apply

Close

### Metadata Search limitations

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

- Search is performed as the exact match - i.e. when looking for a text values the whole value has to be specified. Partial matches aren't supported
- Every metadata search condition narrows the search - the result has to match all conditions at the same time (AND logical operation is performed)

## Use Cache Results

To increase search speed when users rerun a previous search, FileCloud caches search results by default. However, if files or folders are modified or moved, search results are not up to date. You can override caching of results in the Advanced Search dialog box.

To begin a new search each time you search:

1. In the Search bar, click the down arrow.  
The Advanced Search dialog box opens.
2. Uncheck the **Use Cache Results** checkbox.  
In future searches, **Use Cache Results** keeps the setting you entered unless you change it.

Advanced Search ✕

Term:  ⓘ

Scope:  All  Name Only  Content Only  Metadata

Search Type:  All files/folders  Files Only  Folders Only

Path Selection:  All  Selected

Selected Path:  ⓘ

Date:

Results Count:  Limit 50  All

Use Cache Results:  

# File and Folder Comments

You can add details about the status of a file or the purpose for a folder in the Comments section of the Details tab.

You can mention other FileCloud users in your comments by typing the @ symbol and then the name of the user.

When you type the @ sign, a dropdown box will appear. Type in the first letters of the user name and then select the user account from the list.

Once a person is tagged, the user will receive an email as well as notification on their dashboard in the User portal about the comment.

You can mention other FileCloud groups in your comments by typing the @ symbol and then the name of the group.

When you type the @ sign, a dropdown box will appear. Type in the first letters of the group name and then select the group from the list.

Once a group is tagged, all users in the group will receive an email as well as notification on their dashboard in the User portal about the comment.



## To add a comment:

1. Open a browser and log in to the User Portal.
2. Navigate to the file or folder you want to comment on.
3. Select the checkbox next to the file or folder.
4. In the right pane, select the Details tab.
5. Scroll down to the Comments section.
6. In the Comments section, click the +Add button.
7. Type in your comments and then click Save.

# View Folder Properties



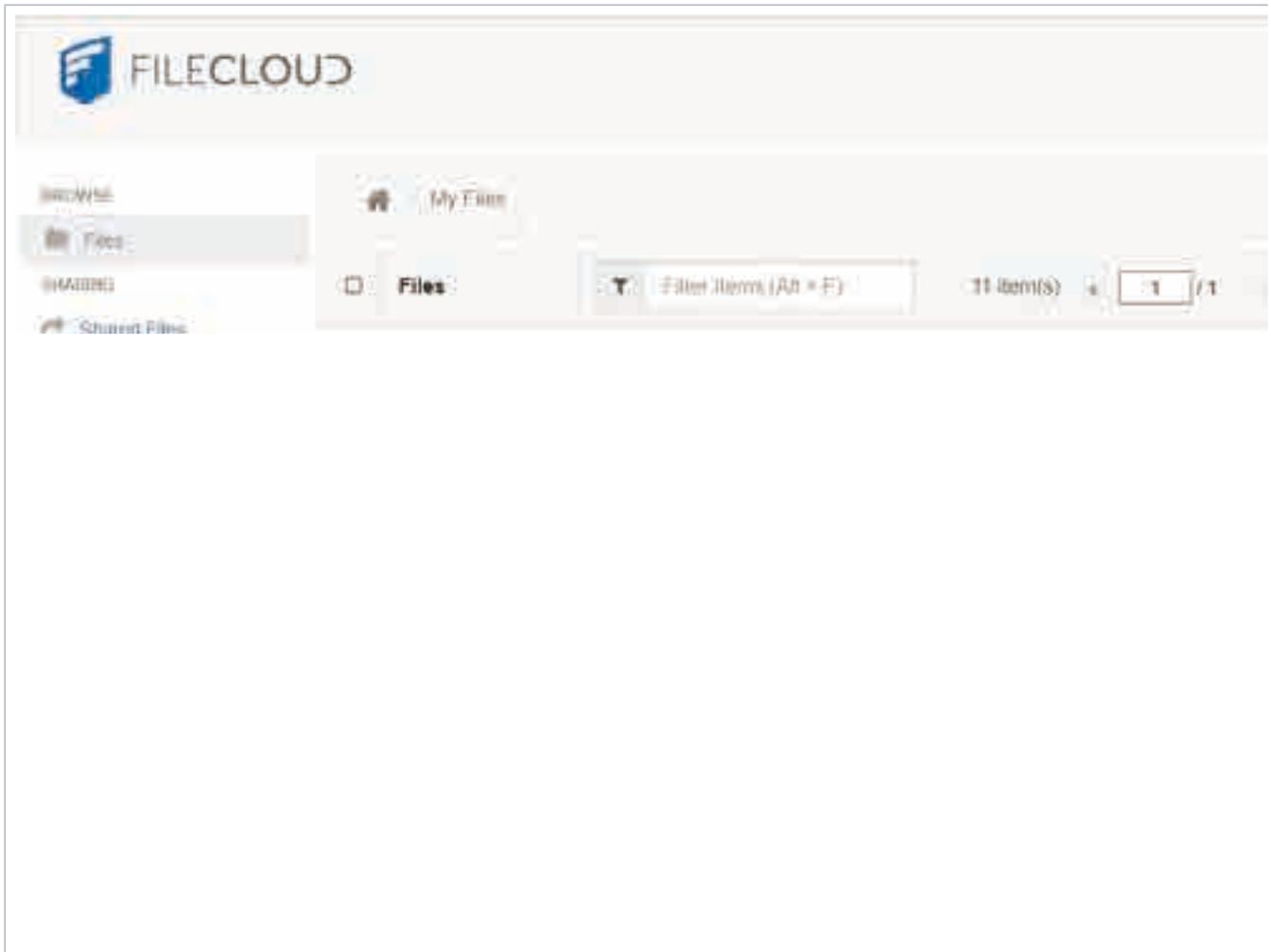
You can use the information about a folder to determine how much storage space it is using and how many files it contains.

The screenshot shows a dialog box titled "User Home Properties" with a close button (X) in the top right corner. Inside the dialog is a table with the following data:

Entry	File Size	File Count	Folder Count	Actions
Live	211.56 MB	33	8	
Previous Versions	44.29 MB	14	-	<a href="#">Clear</a>
Partial Incomplete Uploads	0 B	0	-	
Deleted Files	53.17 MB	8	0	<a href="#">Show</a> <a href="#">Clear</a>
Total	281.93 MB	51	8	

You can see the properties by using the Folder Actions menu.

**Folder Actions**



⚠ The *Properties* option is not available in the menu if you have something selected in the *Files* list. To get the properties of a folder, it should be open and you should be able to see the folder contents in the *Files* list, with no item selected.

**To view a folder's properties:**

1. Open a browser and log in to the User Portal.
2. In the *User Portal*, from the left navigation pane, click *Files*.
3. Open the folder that you want to see the properties for.
4. Make sure that nothing is selected in the *Files* list.
5. Click the *Folder Actions* menu, and select *Properties*.

# Work with Email Files



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



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

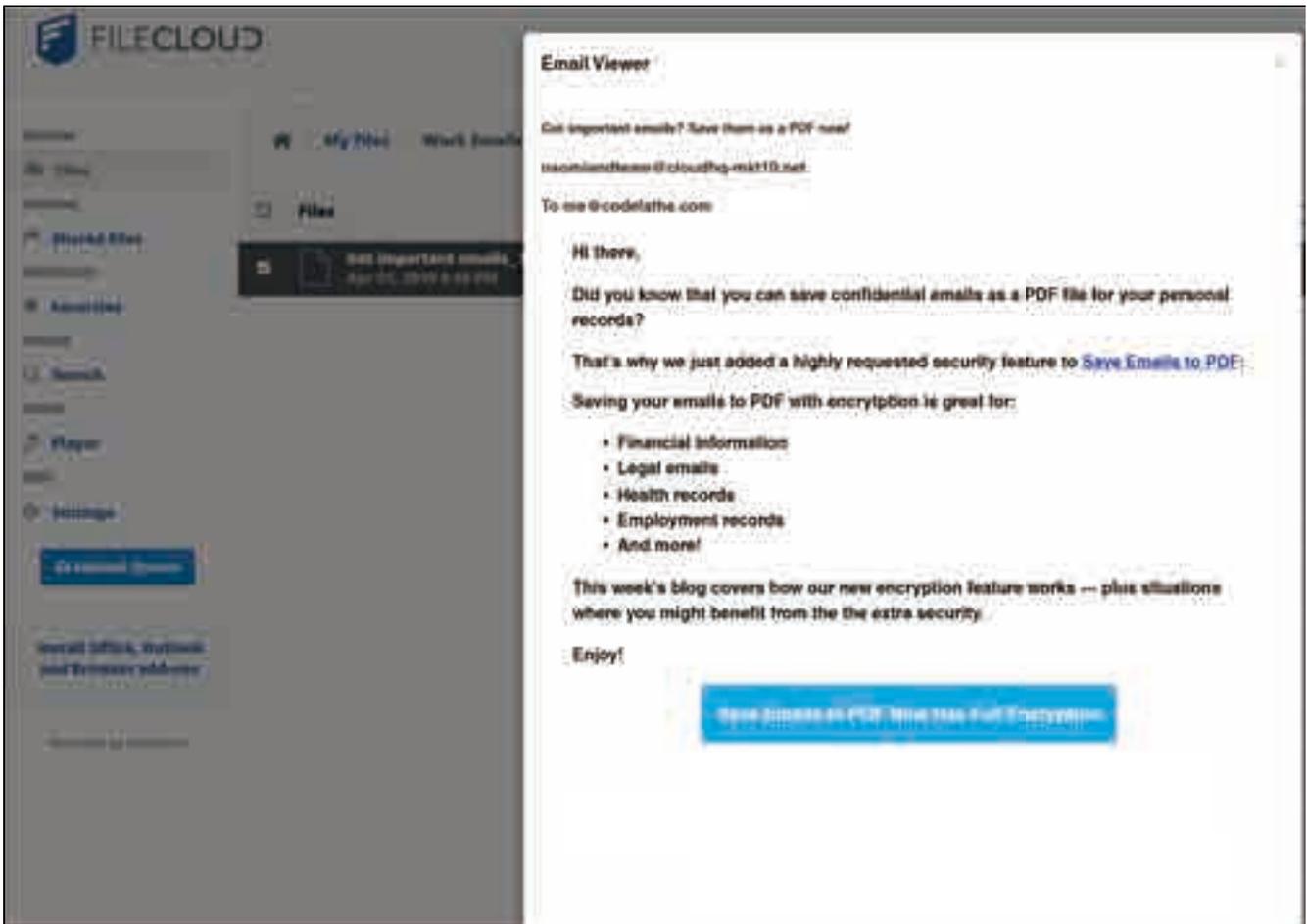
- View the From, To, Subject and Body
- View any file attachments
- Forward that email without any change to other email addresses

## What do you want to do?

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

 [Upload a file](#)

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



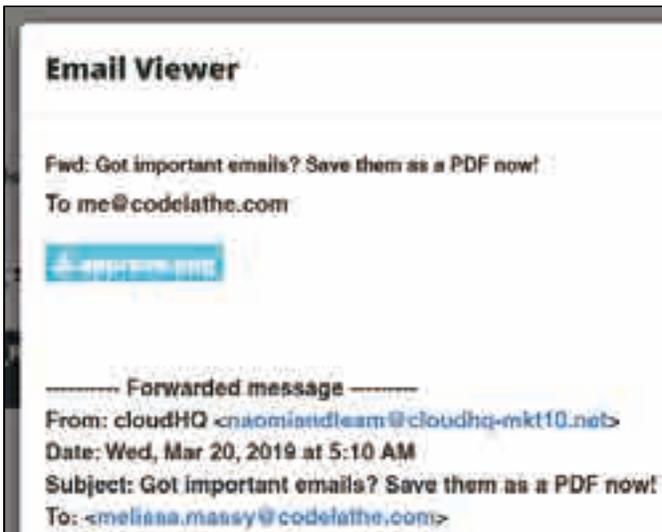
To open an email file:

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

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

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

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

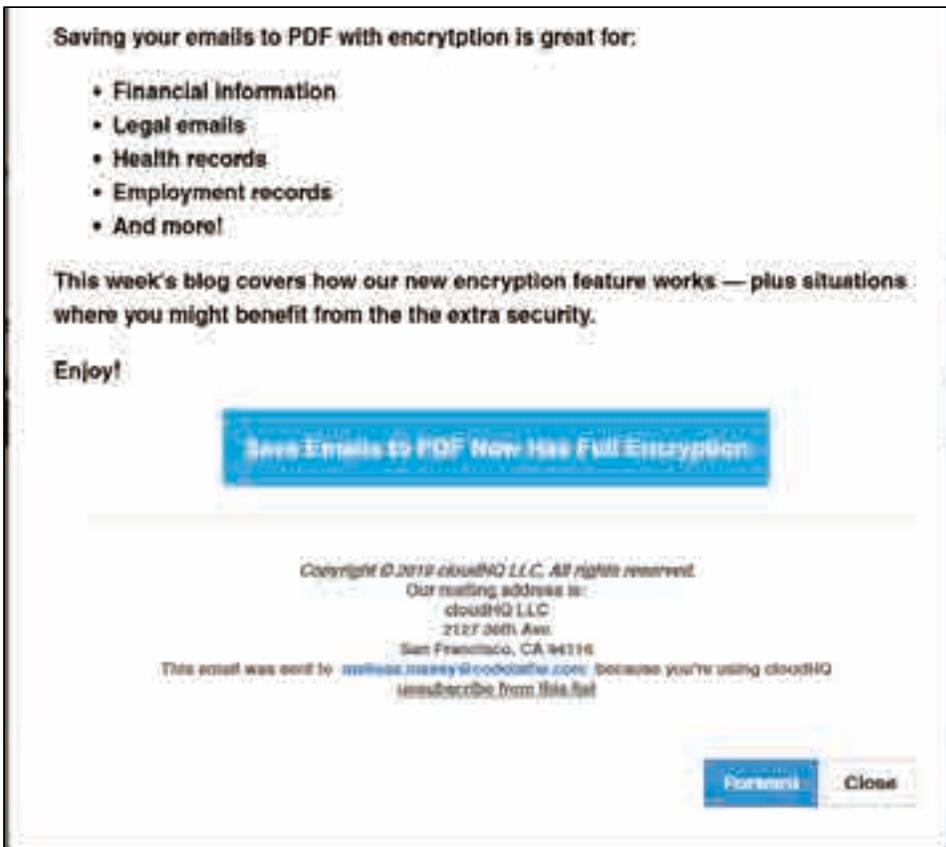


To open an attachment:

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

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

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



To forward the email message:

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



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

➔ [Sharing a file](#)

# Advanced Folder Operations



After logging in to the User Portal and uploading files, you can use the following advanced operations to further manage your files:

 <p>More options for viewing</p>	<ul style="list-style-type: none"><li>➔ <a href="#">Create a Favorites List</a></li><li>➔ <a href="#">View Previous Versions Of Files</a></li><li>➔ <a href="#">View Photo Gallery</a></li><li>➔ <a href="#">Viewing Your Activity Stream</a></li></ul>
 <p>More options for managing files</p>	<ul style="list-style-type: none"><li>➔ <a href="#">Playing Audio</a></li><li>➔ <a href="#">File Locking</a></li><li>➔ <a href="#">Set Folder-Level Permissions</a></li><li>➔ <a href="#">Creating a Direct Link</a></li><li>➔ <a href="#">Adding Metadata</a></li></ul>
 <p>More options for managing your space</p>	<ul style="list-style-type: none"><li>➔ <a href="#">Recovering Space</a></li></ul>

# Add to Favorites

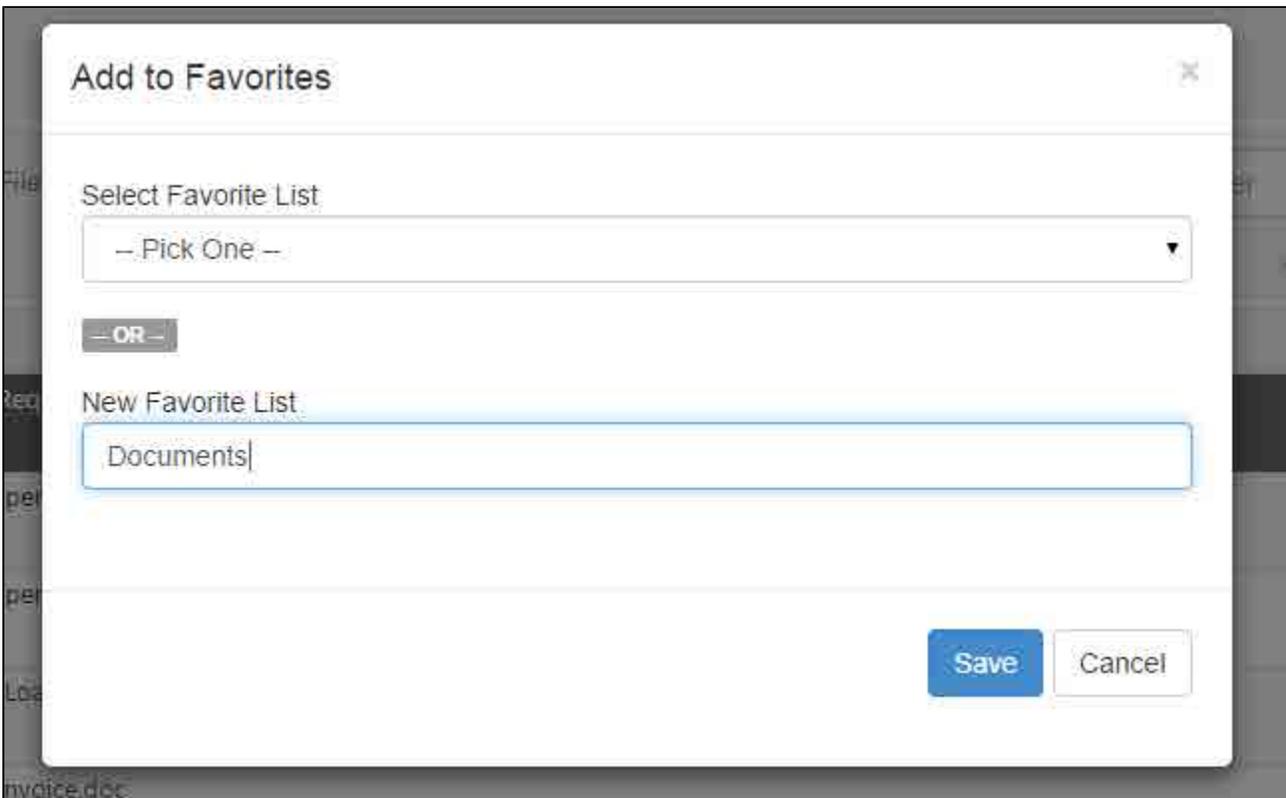
## Select Items

Select the file/folder entry (either checkbox, or outside the name). Click on 'Add to Favorites' button from the context menu.



## Add To Favorite List

After clicking on the button, a dialog will be popped. Either create a new favorite list or add to an existing favorite list.



# View Photo Gallery

## View a Photo Gallery - Large and Small Thumbnails

You can switch from normal file listing to photo gallery view by clicking on the "Gallery Tab". The photo formats supported are JPG & PNG. You can switch between Large and Small Thumbnails.

The photo formats supported are JPG & PNG.



## View a Photo Gallery - Small Thumbnails

You can switch from normal file listing to photo gallery view by clicking on the "Gallery Tab". The photo formats supported are JPG & PNG. You can switch between Large and Small Thumbnails as above

## View Slide Show

You can start a photo slideshow by clicking on the slideshow button.



# Slide Show Controls

The slide show controls are:

- Navigation
  - Previous
  - Next
  - Stop
  - Play - Auto
- Rotate
  - Clockwise
  - Counter Clockwise
- Share
- Full screen - View
- Download Image



## Share

You can directly share the image from the slideshow.





# Playing Audio

- [Player Controls](#)
- [Playlist](#)

# Player Controls

## Player Controls

The player has all the standard controls as any other media player. The player functions are as follows:

- Play
- Pause
- Forward
- Rewind
- Random Shuffling
- Sequential Shuffling



# Playlist

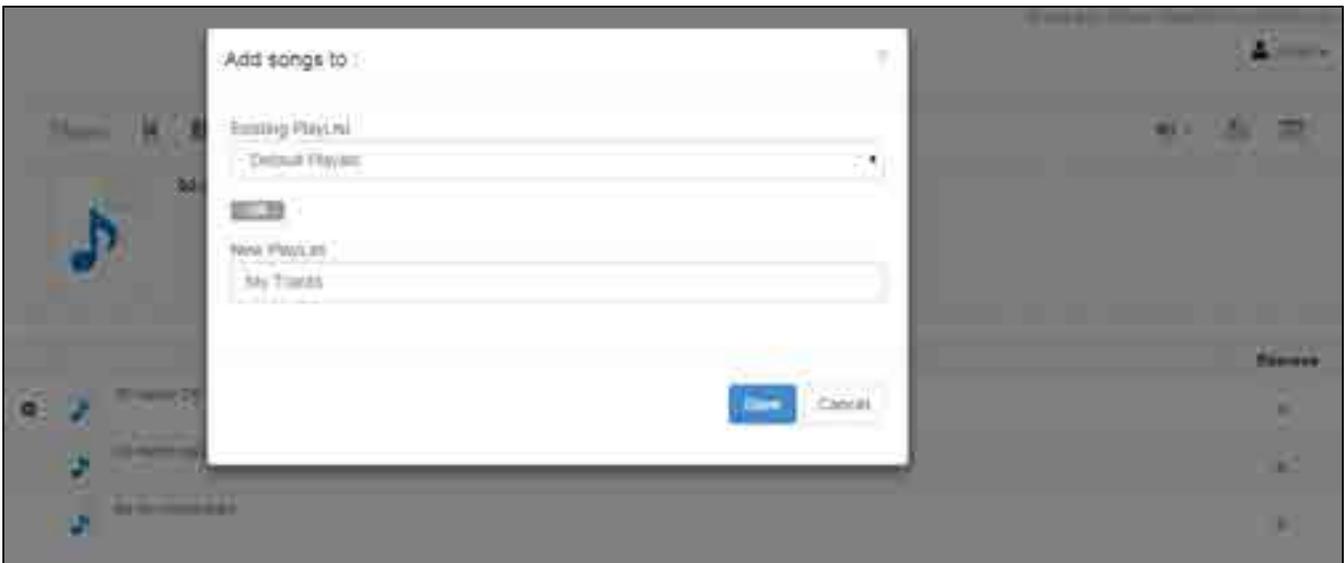
## Save Current Play Queue as Playlist

We added playlist support that will help you to get to your music faster. To create a playlist from an existing queue, just click on the icon displayed below.



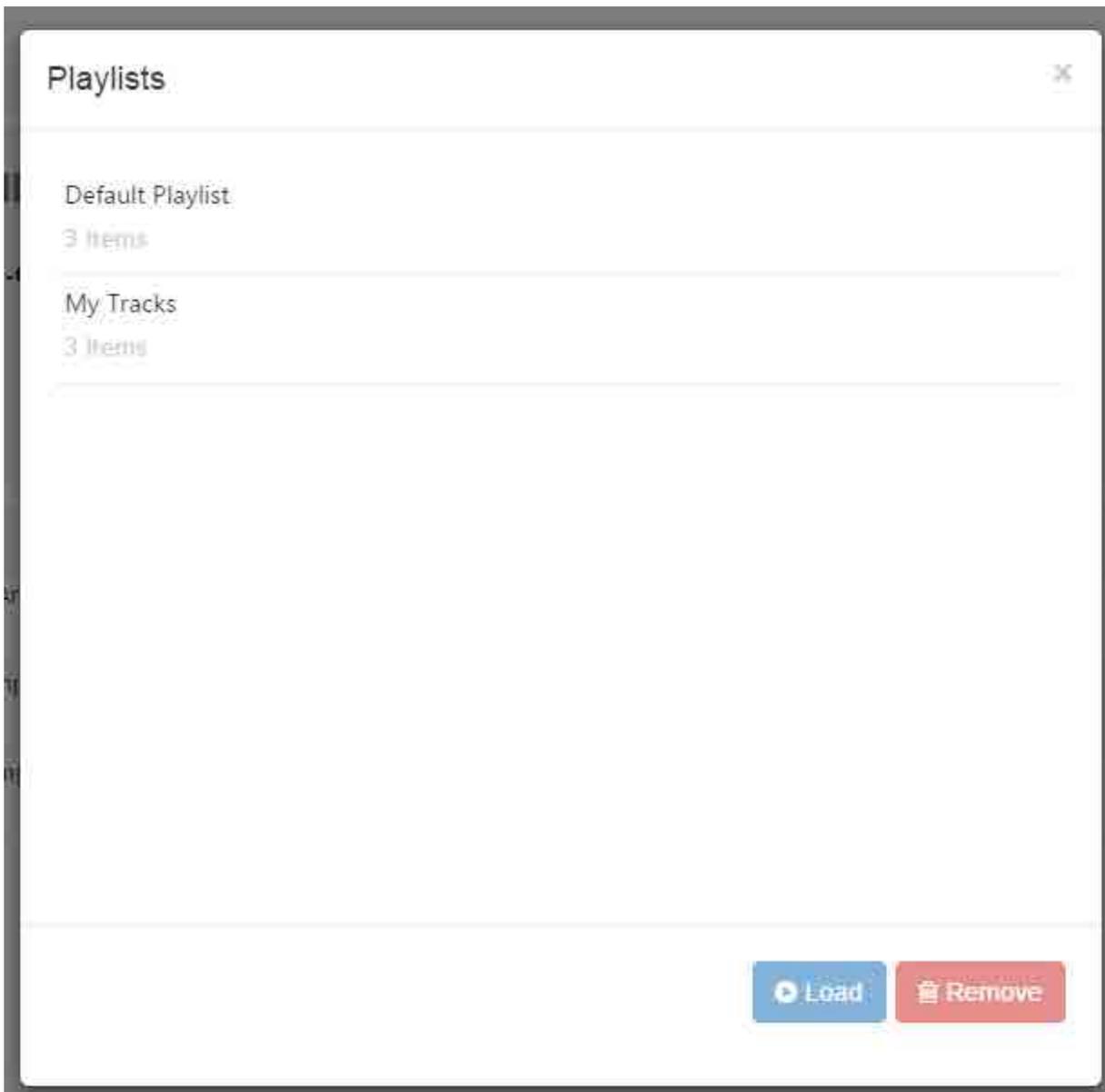
## Create a Playlist

Enter a name of your playlist.



## View List of Playlists

Click on the icon displayed below, to list the available playlists.



## Load a Playlist

If you want to load a Playlist, just click on the name and the selected playlist will get loaded into the player.

# Playlists



Default Playlist

3 Items

**My Tracks**

3 Items

 Load

 Remove

# View Previous Versions Of Files

- [Introduction](#)
- [Access to Previous Versions](#)
- [Download Previous Versions](#)
- [Make Previous Version Live](#)
- [Delete Previous Versions](#)
- [Delete all Previous Versions in all Files](#)

## Introduction

FileCloud can automatically maintain multiple versions of a file. The number of versions stored is configurable by the system administrator. By default up to 3 versions are kept.

If any older versions of a file is available, it can be accessed using the context menu. Previous versions are available for both My Files (Managed storage) and Network Folders.

When sharing a folder or file, if the share has "Write" permission set, then the Previous Versions of files are also available.

## Access to Previous Versions

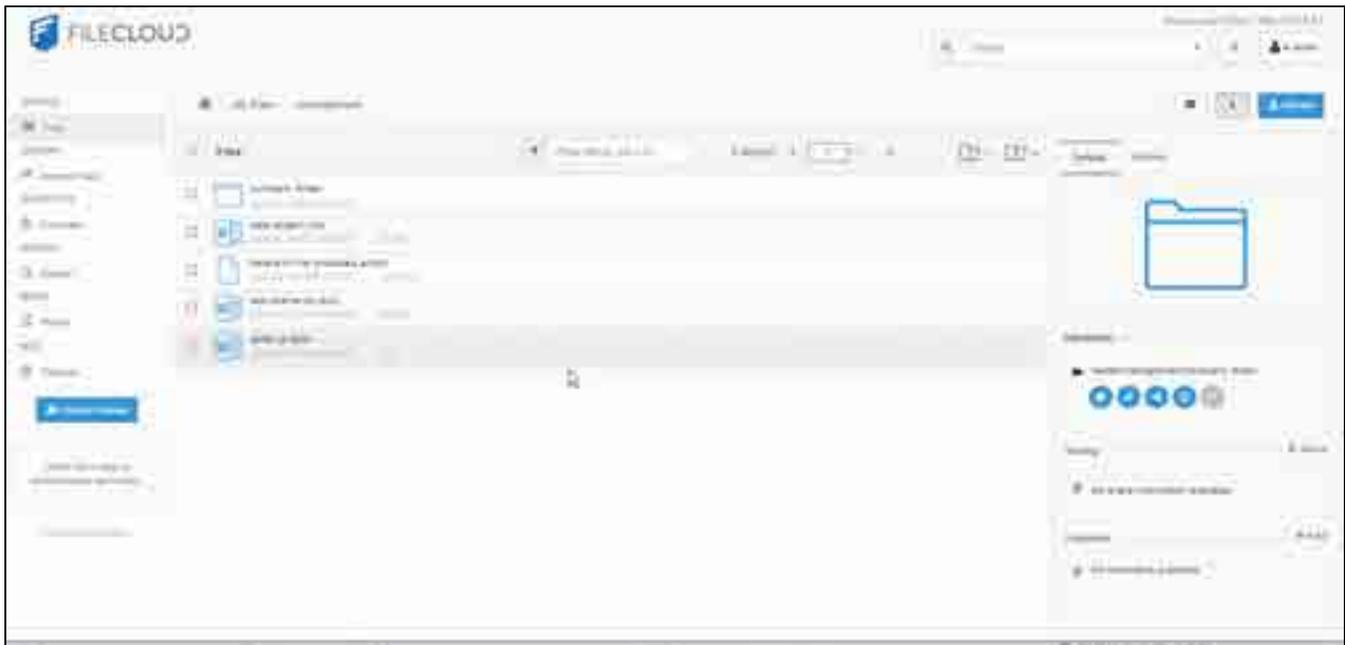
Click on the Previous Versions for a selected file to view the prior saved versions.

**Note:** Viewing the deleted files under My Files (Managed Storage) will display all the files and folders deleted from any location under My Files. However, when viewing deleted files under Network Shares only files that were deleted from that particular network share folder will be displayed. In order to view the deleted files from a different network share folder, you must navigate to that network share folder and click the deleted files.

### Note

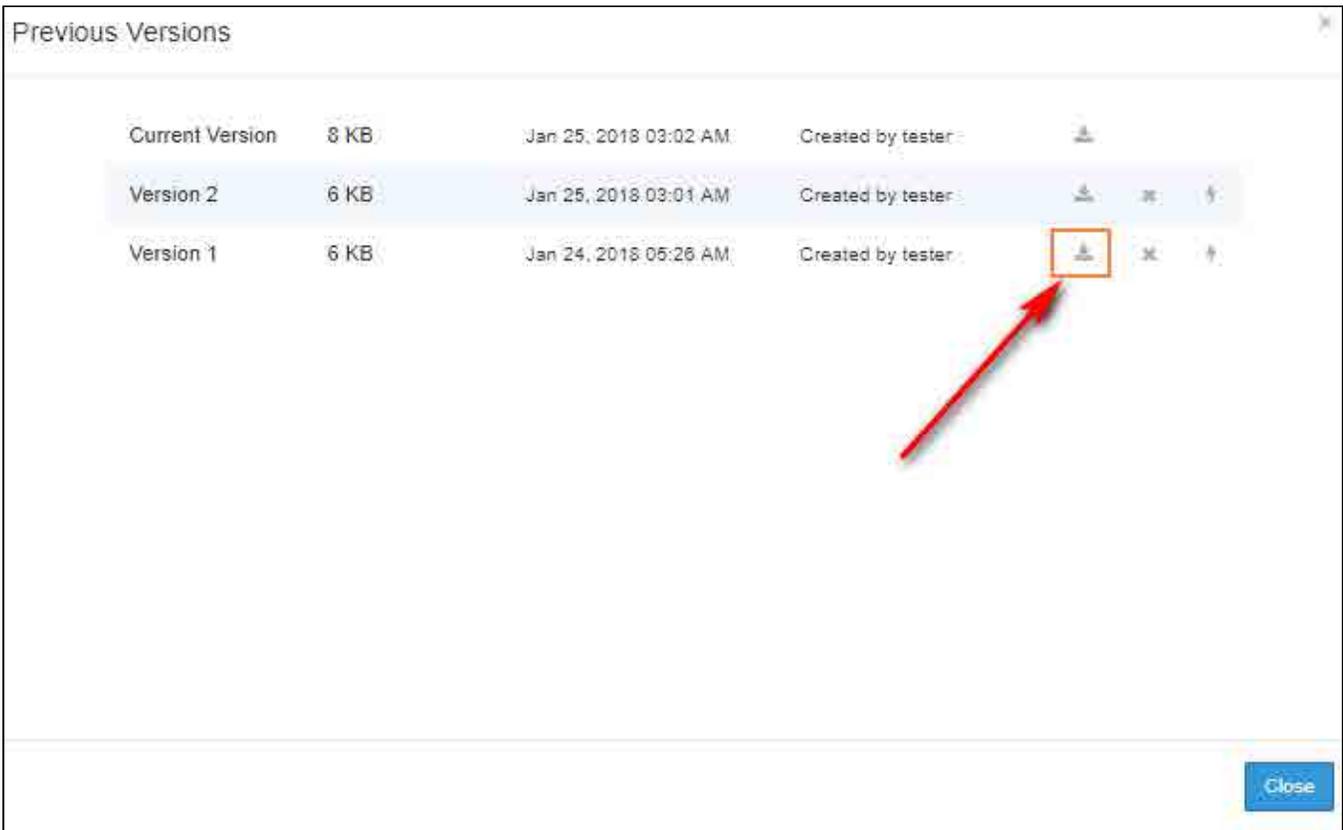
For My Files section, the following columns are displayed Version Id, version size, created date, created by, versioned date followed by the actions

For Network Files, the following columns are displayed version id, version size, created date followed by the actions.



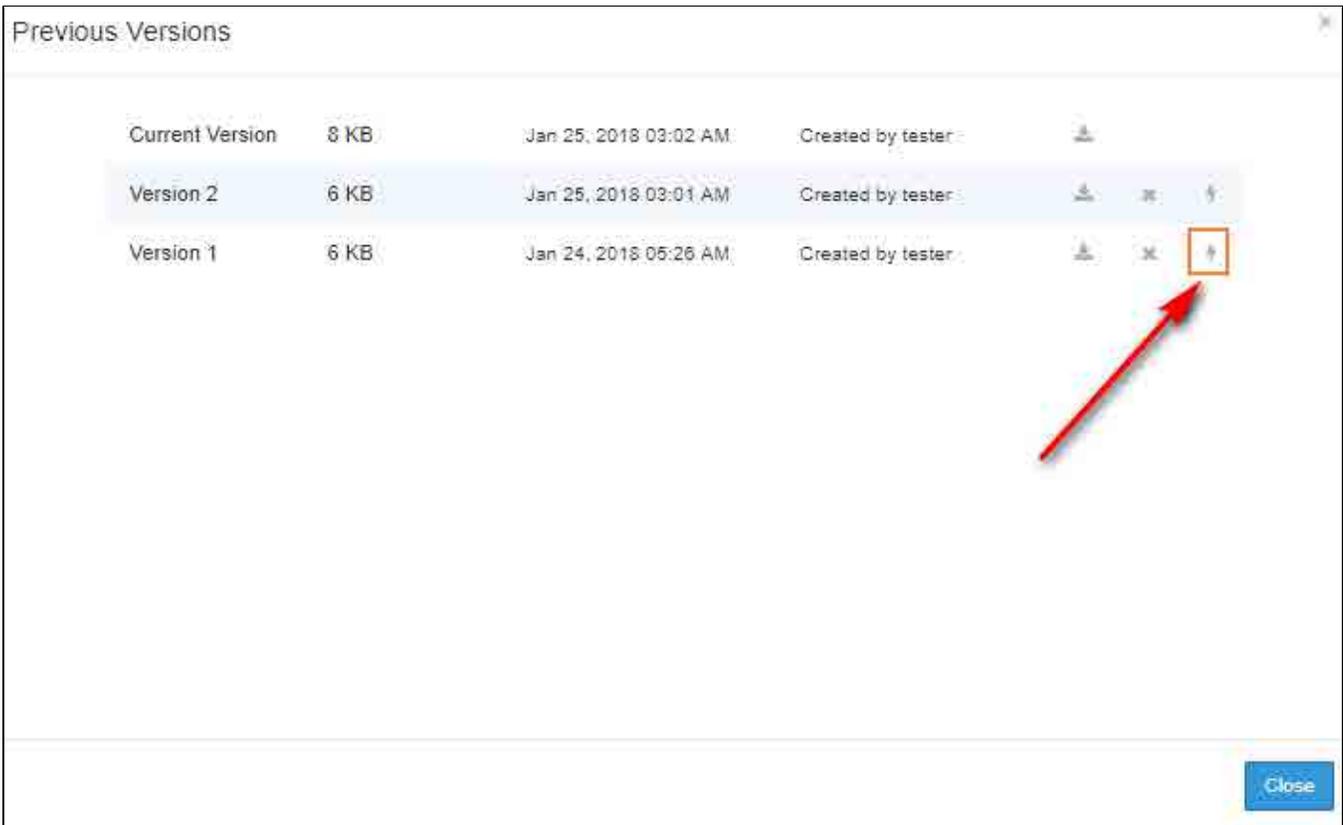
## Download Previous Versions

From the Previous Versions list, download the version you want.



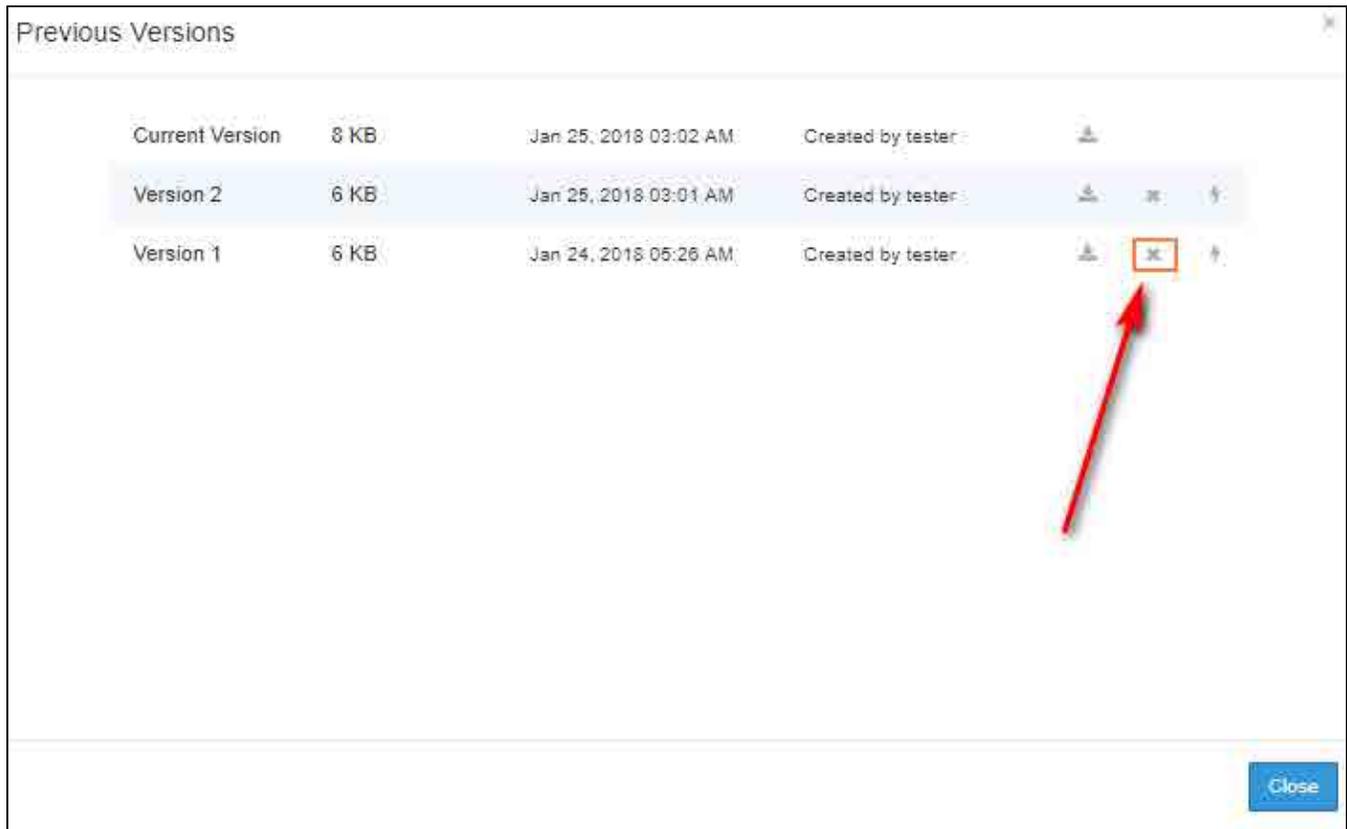
## Make Previous Version Live

From the Previous Versions list, select the version you want to make live.



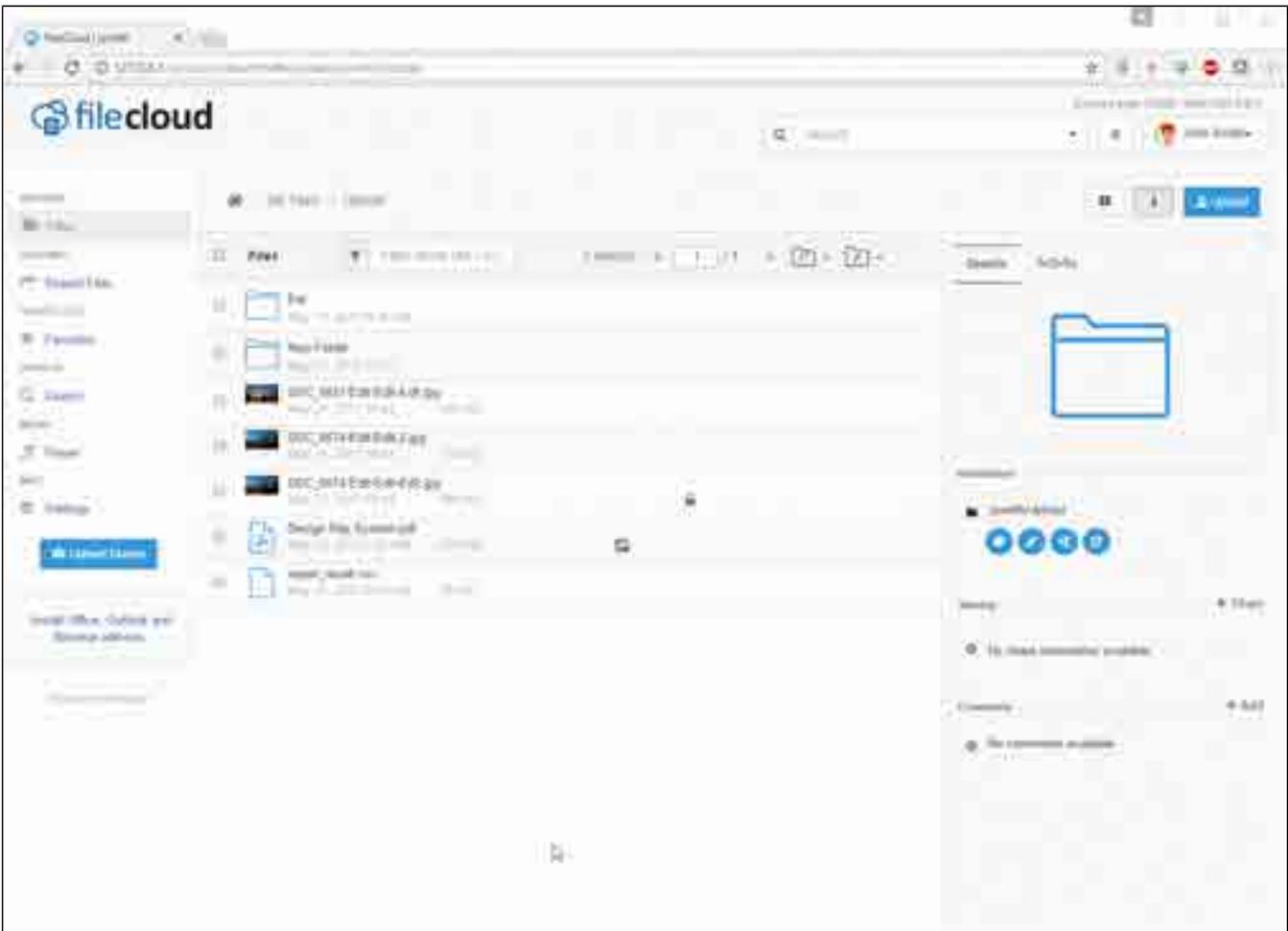
## Delete Previous Versions

From the Previous Versions list, delete the version you want.



## Delete all Previous Versions in all Files

Users can delete all previous versions in all files by opening the recycle bin and selecting the option to remove all old versions (only applicable for My Files)



# Activity Stream

 Activity Stream, Comments support are available starting from FileCloud 8.0

The Activity and Details Panel display can be disabled on and off using the "i" icon in top panel.



FileCloud shows changes and actions happening to a file and folder via an Activity Stream. This is useful when multiple people work on the same set of files.

The activity stream has to be enabled or disabled from Admin portal (see: [The Misc. Tab Settings](#)). Once the activity stream is enabled, actions performed on a file or folder are tracked and are displayed in the User Portal.

Starting from v 17.3, the activity stream will also show the Geo Location information.

 Beginning Linux Programming,3rd Ed 2004  
(1).pdf



**You viewed this file**  
at 08:45 AM on Dec 28 2017, via Web  
browser From 50.116.16.157



 wopi



**You publicly shared this folder**  
at 08:55 AM on Dec 20 2017, via Web  
browser From Unknown

# File Locking

- [Locking Overview](#)
- [Locking a File or Folder](#)
- [Viewing Locked Files and Folders](#)
- [To Filter User Locks](#)
- [Unlocking a file or folder](#)



Support for file locking is available in FileCloud version 9.0 and later.

Locking is only intended for controlling access to file and folder when accessed via FileCloud. For example, **locking a file in a network folder in FileCloud does not lock the file in the filesystem and prevent access to that file in the LAN.**

## Locking Overview

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



**Locking has to be enabled by the Administrator** before the user has the option to lock a file or folder.

**FileCloud LOCKING is designed to prevent opening/accessing files between DIFFERENT USER ACCOUNTS. If you lock a file, you are still able to access it.**

When a file or folder is locked:

- A lock icon is shown in the file listing.
- The owner of the lock is shown in the details panel on the right hand side.
- The owner of the lock has full access to that file or folder and can modify it.
- Admins can always [override a lock using the admin panel](#).
- A lock can be setup to prevent reads by other users. In that case other users cannot download or view the locked file or folder.
- Only local users can permanently edit the locked file. Any changes made by remote users are not saved.

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

Lock with read allowed	Access by lock owner	Access by others
Yes	Full access to the file is available. Share/Sync /Edit/Deletes allowed	Only read is allowed. No modification is allowed
No	Full access to the file is available. Share/Sync /Edit/Deletes allowed	No access is provided . All access using all clients are blocked.

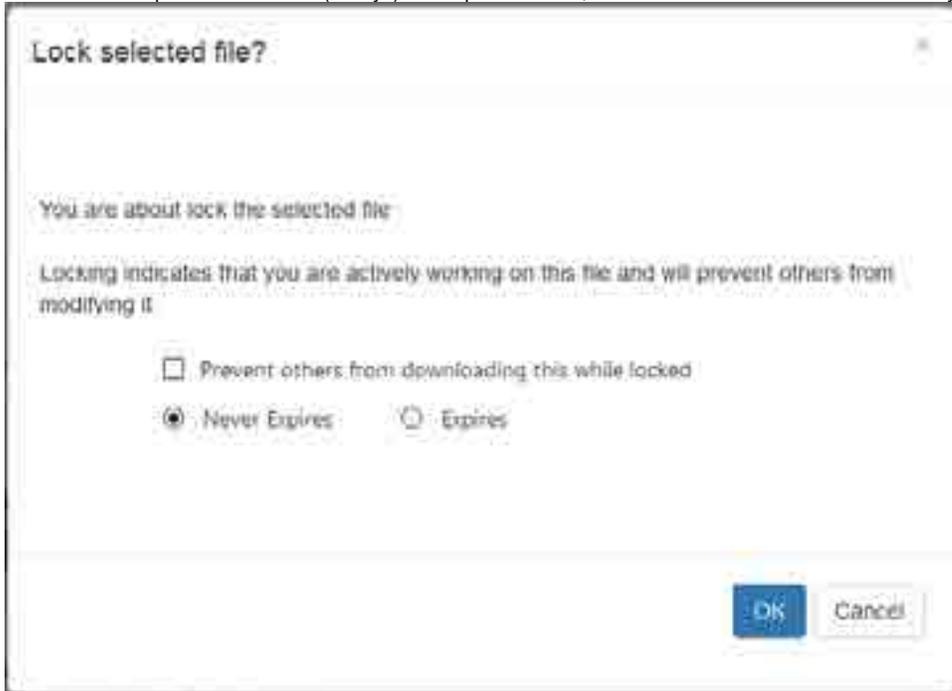
## Locking a File or Folder

To lock a file or folder,

- Select the file or folder
- In the **"More"** drop down menu, select **"Lock"**



- In the popup,
  - Selecting "Prevent others from downloading this while locked" will prevent all reads as well as writes to the file or folder. This is very restrictive in its behavior. If it is not selected, then other users can view file/folder content but not modify it
  - A custom lock expiration can be set (in days) If a expiration is set, then the file or folder will be automatically unlocked after that date.



- A message will indicate if the lock is successful or not and a lock icon will appear. selecting the file or folder will also show the owner of the lock as well as the type of lock (Read allowed or not)



At this point, all clients (Web Application, Cloud Drive, Cloud Sync, Mobile clients, WebDAV) will all be subject to the lock restrictions (Only the owner access using these clients is allowed).

**i** If a folder is locked, no files in that folder or its subfolder can be locked. Furthermore, none of the parent folder tree can be locked (For example, for a folder structure of A\_Folder/B\_Folder/C\_Folder/D\_Folder, if "C\_Folder" is locked by USER1, then none of A\_Folder, B\_Folder, D\_Folder can be locked by USER2 until the lock of "C\_Folder" is released)

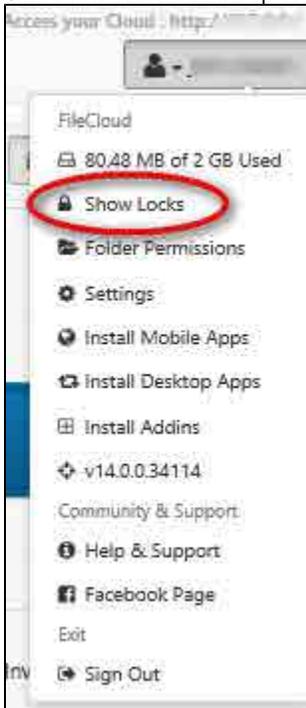


To change a lock property (like disallow read or change expiration), the lock has to be released and then the lock has to be retaken

## Viewing Locked Files and Folders

To view all locks in the system via the web browser

- Click on the user account drop down button



- Click on "Show Locks"



## To Filter User Locks

Type in lock path in the "Filter" textbox to filter the locks view with respect to the lock path

## Unlocking a file or folder

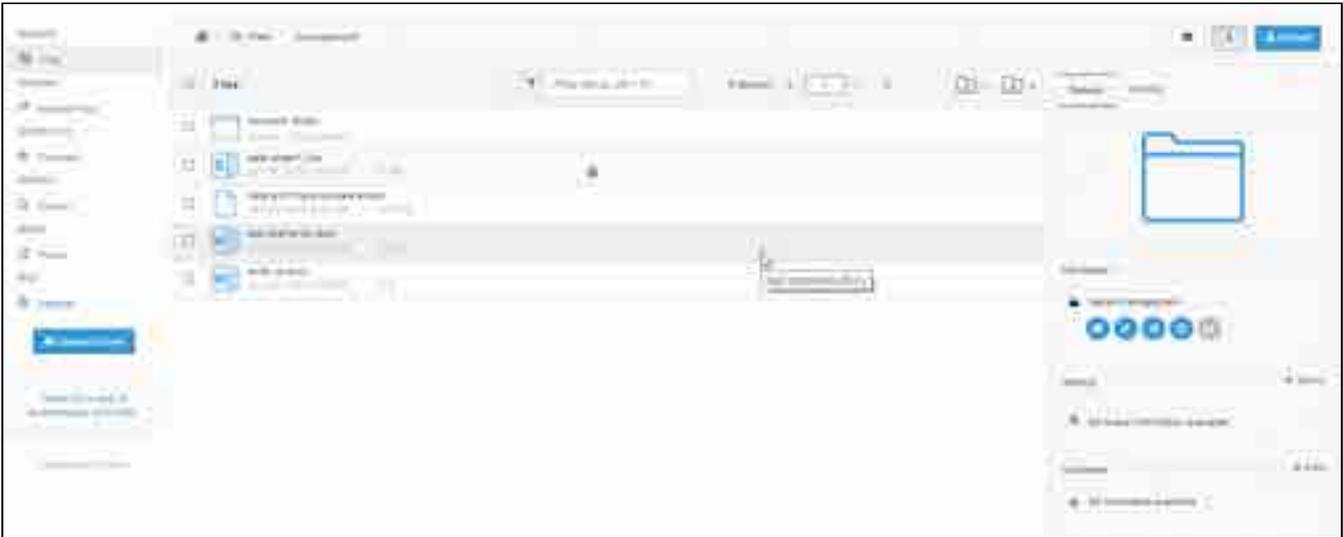
Once a file or folder is locked, it can be unlocked only by the owner of lock or by administrator.

To unlock as Administrator, [Read this article](#)

To unlock as the lock owner,

- Navigate to the page containing the file or folder
- Select the file or folder
- Under the "More" drop down menu, select "Unlock"

It can also be using the unlock option in the "Locked Files and Folder" panel (See previous section)



# Recovering Space

## Introduction

During normal FileCloud usage, users might be running out of space, even though they don't have usable files that exceeds the assigned user quota. There might be several reasons this can occur.

- In recycle bin is enabled, then it might be accumulating all the deleted files.
- When users edit/modify/upload existing files, then new file versions will be created. The number of versions that are retained depends on the administrator settings (default is 3).
- When files are uploaded into FileCloud, sometimes the upload gets terminated for various reasons. In these cases, clients uploading files should be retrying and continue the upload. But some clients, such as browser will not resume the upload. They will restart the upload from the beginning.  
This behavior will result in partially uploaded files and they are unusable.

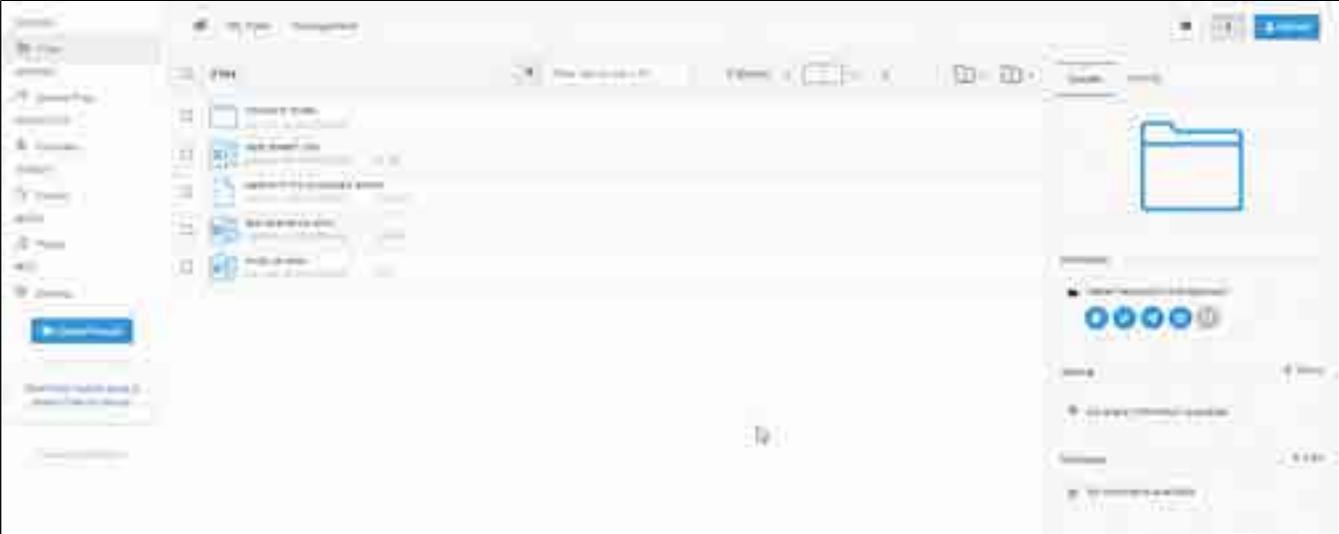
Files that fall under the above categories might be cleaned from time to time. Following sections explains how these files can be removed or cleaned.

- [Empty Recycle Bin](#)
- [Remove All Old File Versions](#)
- [Clear Incomplete Files](#)

# Empty Recycle Bin

## Empty Recycle Bin

When users are running out of cloud storage space, they might need to empty their recycle bin contents in order to recover some space. This can be done by going to recycle bin and deleting few selected files or clearing all files from the recycle bin.



# Remove All Old File Versions

## Remove All Old File Versions

When users are running out of cloud storage space, they might have lots of versioned files (provided administrator has enabled that feature for users). To remove these older versions of the file, users can go and select versioned files and remove them individually or delete older versions of all the files. This can be done from the recycle bin.



# Clear Incomplete Files

## Clear Incomplete Files

When users are running out of cloud storage space, they might have lots of incomplete files in their storage space. This is mainly due to partially uploaded files. These files need to be removed from the storage to recover the space occupied by them. This can be done from the recycle bin.



# Set Folder Level Permissions

 To enable Folder Level Security, please enable it via Administrator settings: [Enable Folder-Level Permissions](#)



## Setting Folder Level Permissions

To set Folder level permissions, login into the web interface and navigate to the folder and select it.

In the security tab, select the "Manage Security" button.

Set the permissions allowed or disallowed for each user or group in this dialog:

## Manage Folder Level Security ✕

Folder: /local1/Projects/Folder 2

Security Check Access

---

### Permissions

**Inherit Parent Folder Security:**  Inherit  Don't Inherit

User Group

Add User

User	Read	Write	Delete	Share	
jane@codelathe.com	✓	✓	✓	✗	🗑️
joe@codelathe.com	✗	✗	✗	✗	🗑️

⏪ ⏩ Page  of 1 ⏪ ⏩

✕ Close

It is possible to check the effective permissions for a user (not considering Share Permissions) by using the Check Access tab to check the permissions.

Effective Permissions only calculates permissions based on Folder Level Permissions and doesn't consider Share Permissions.

## Manage Folder Level Security



Folder: /local1/Projects/Folder 2

Security

Check Access

### Effective Permissions

Check effective permissions for any user when this path is shared with them. Note: Share permissions are not considered here. If share permissions are more restrictive, those will be applied.

 jane@codelathe.com [Check](#)

-  Read access allowed
-  Write access allowed
-  Delete access allowed
-  Share access not allowed

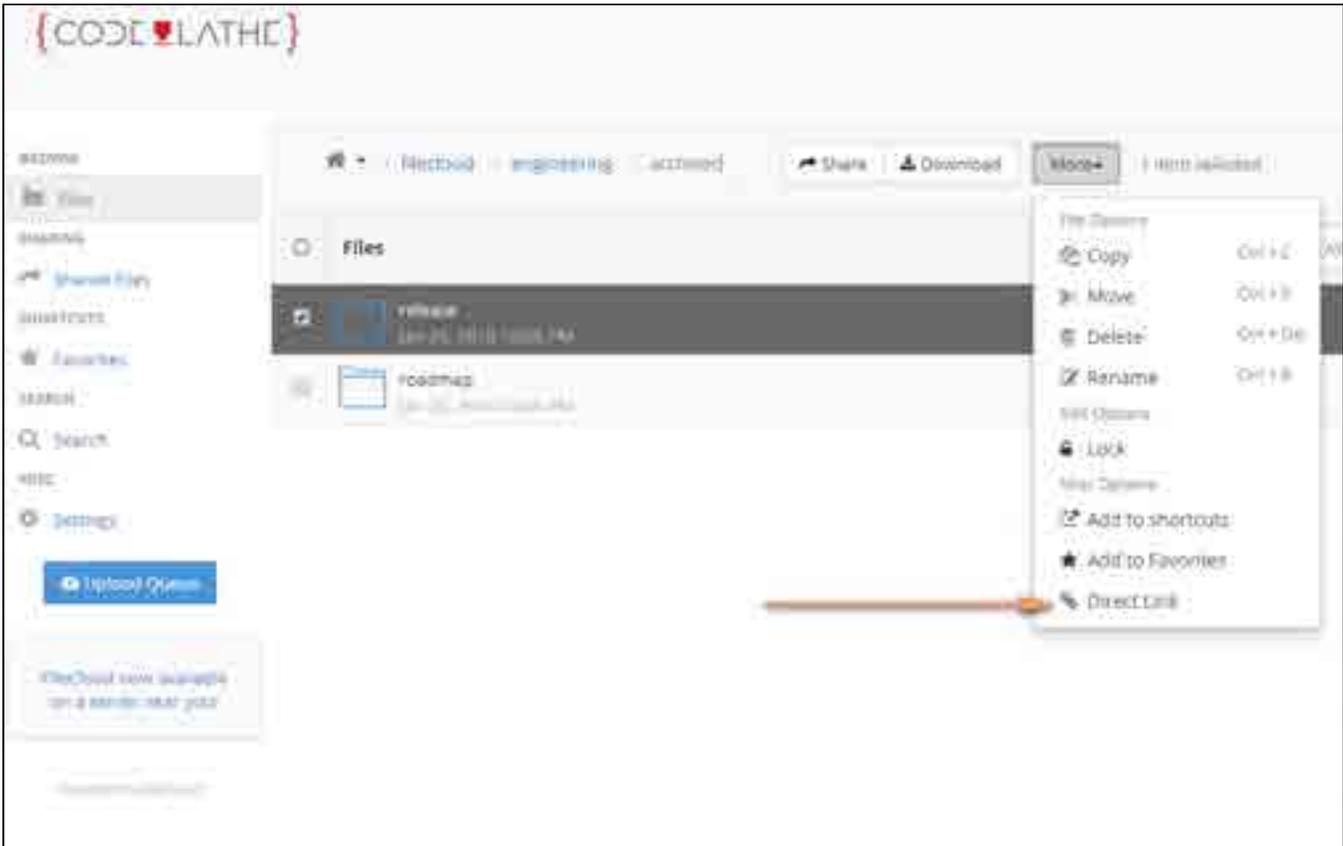
[X Close](#)

# Creating a Direct Link

If users like to create a link to a folder or a file to people in an existing share without creating a new share, they can select the file or folder and then click "More" click "Direct Link".

This will create a link that can be shared to other people who are already part of the share. Clicking the share will require that the user login and then takes them directly to the selected folder or file.

**Note :** Direct Link will work only in the "Shared with me" and the "Team Folders" Section.



# Adding Metadata

 Metadata support is available starting from FileCloud 18.1.



You can manage data that provides additional information about files and folders available in FileCloud Server using **Metadata**.

FileCloud defines two levels of metadata definition:

1. **Attribute** - defines a single piece of information that user can specify for file or folder.
2. **Metadata set** - a group of related attributes with additional properties and settings. It works as a container for attributes.

Your Administrator must grant you permission before you can see the Metadata tab in the User Dashboard.

Ask your Administrator to grant you permission to access Metadata. Your administrator can grant the following types of permissions:

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

## What do you want to do?

Figure 1. Metadata Terms

 File Object	→	 Metadata	→	 Attribute	→	 Metadata Set	→	 Tag
Every file and folder that exists in FileCloud.		Information about the file data.  Describes files and folders available in the system.		A single piece of information that describes the File Object.  In FileCloud attributes are defined as a part of the metadata set.		A set of metadata attributes that might be logically grouped and can be attached as a single entity to File Objects.		a special type of attribute (referred to as the Array attribute type) that allows users to provide multiple custom values for each File Object.
For example: <ul style="list-style-type: none"><li>• a resume</li></ul>		For example: <ul style="list-style-type: none"><li>• Lives in the Human Resources Folder</li><li>• Has a created date</li><li>• Has a modified date</li></ul>		For example: <ul style="list-style-type: none"><li>• the candidate's photo in their resume</li></ul>		For example, resumes will always have: <ul style="list-style-type: none"><li>• Photo</li><li>• Name</li><li>• Address</li><li>• Experience</li><li>• Education</li></ul>		For example: HR wants to tag a resume status as: <ul style="list-style-type: none"><li>• Candidate</li><li>• New Hire</li><li>• OnBoarding</li></ul>

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

Operation	Rule
a new file or folder is created	a default metadata set is automatically attached to it with all attribute values populated with default values defined
a new file or folder is uploaded	a default metadata set is automatically attached to it with all attribute values populated with default values defined

a file or folder is copied	metadata values <b>are not</b> copied. The Default metadata set with default values will be added to the new File Object.
a file or folder is moved	associated metadata values are also moved. The metadata points to the original file or folder during its lifetime.
a file or folder is renamed	associated metadata values are also renamed. The metadata points to the original file or folder during its lifetime.
a file is removed and moved to the recycle bin	the associated metadata values are updated so they point to the file in the recycle bin.
a file is permanently removed from FileCloud Server	the associated metadata values are removed as well.

Metadata Panel is available on the right hand side panel, next to Details and Activity Panels. It will only appear when both activity panel and metadata panel are enabled. Otherwise it will be hidden. This panel displays the following:-

- all metadata related information for the selected file or folder.
- a list of available metadata sets that can be added for the particular File Object.
- a list of associated metadata sets with corresponding attribute values.



To add a metadata set to a file or folder:

1. Select one of the available metadata sets. NOTE: The metadata set must not already be attached.
2. Click the *Add* button.
3. The newly added metadata set with corresponding attributes will be displayed.
4. You can edit the default values if necessary.

To remove the metadata set association:

1. Click the *Remove metadata set* icon.
  - A confirmation will appear
  - Once confirmed the respective values will be removed as well
  - This operation cannot be undone



Watch a video about [Associating Metadata Sets with File Objects](#).

Users with write permissions can edit attribute values for a given metadata set. Once corresponding "Save" button is clicked, values are validated and saved when validation succeeds.

**i Required values**

Some attributes might be marked as required. For those attributes non-empty value has to be provided. They are marked in the UI with an asterisk - \*.

**i Tag Input editor**

Tag input is a custom editor that allows users to provide multiple values for a single attribute with a better experience. It looks like a regular TextBox but supports multiple values. When user writes a string and presses the Enter or enters a comma a new value is added to the control. It's called a Tag and appears as a text in a blue rectangle. Values can be removed by pressing the cross icon. It is used as the editor for the Array attribute type (in the User Core UI) and as the editor for Predefined values for enumeration attribute type (in the Admin UI).



Watch a video on Editing Attribute Values.

[→ Searching for Metadata.](#)

# Sharing Files and Folders

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

While files can easily be shared simply by emailing someone your file, sharing files in FileCloud allows you to:

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

You can share a file in many different ways.

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

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

⚠️ In the User Portal, you can click on the root folder, *My Files*, and select *Share*. This is a security threat and should not be allowed.

In FileCloud Server version 19.1 and later:

- In the User Portal, when you click on the root folder, *My Files*, you will no longer have the Sharing option!

## What do you want to do?



➔ Share Files



➔ Share Folders



➔ View Shares



➔ Manage Shares



➔ Delete a share



➔ View Share Analytics

# Sharing Files



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

While files can easily be shared simply by emailing someone your file, sharing files in FileCloud Server allows you to:

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

You can share a file in many different ways.

## Publicly

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

## Privately

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

## What do you want to do?



➔ [Share Files Publicly](#) *No FileCloud account required.*



➔ [Share Files Privately](#) *FileCloud account required.*



Configure other sharing options



[Set Restrictions on Downloads](#)



[Set an Upload Size Limit](#)

# Restrict Download Options

## Note

Download Limit Restrictions is

- Applicable only for files which are publicly shared
- Not applicable for folders
- Not applicable for files which are privately shared

## Set Restrict Downloads

Clicking on the “Advanced Options”, Manage Share dialog appears.

To restrict the number of downloads,

- Click on “Restrict to” which appears under “Restrict Downloads”.
- Set Download limit restrictions in the textbox that appears below “Restrict to”.
- Click on “Update”

By doing this, your file is restricted to download only a certain number of times.

Manage Share for file - [file name]

Share URL: <http://...>

**Share Options**

Shared File/Folder: /usernom/gentpl\_toc.fm

Share Name: I9slGjXkWT0BuKqS

Expires (Optional)  
 Never Expires  Expires

**Restrict Downloads (Optional)**  
 No Restrictions  Restrict to  
5  
0 downloads so far.

Email File Change Notifications  
 YES  NO

Enable Password Protection  
 YES  NO

**Share Permissions**

Allow Everyone  
 Allow Selected Users/Groups

Guest Group:  
Add Guest

Guest	Allow View	Allow Download	Allow Share
Guest	Allow	Allow	Allow

Share permitted for all. No guests selection necessary.

Update

Unsaved changes. Click 'Update' to save.

Remove Share

Close

# Upload Size Limit Option

## Set Upload Size Limit

Clicking on the "Advanced Options", Manage Share dialog appears.

To set the Upload size limit,

- Click on "Limited" which appears under "Upload Size Limit (MB)".
- Set Upload Size Limit restrictions in the textbox that appears below "Limited".
- Click on "Update"

By doing this, your folder is set with an upload size limit.

The screenshot shows the 'Manage Share for folder - test' dialog box. The 'Share URL' is <http://127.0.0.1/athqfWyo7v4bcOp0>. The 'Share Options' section includes 'Shared File/Folder' (testertest), 'Share Name' (athqfWyo7v4bcOp0), 'Expires (Optional)' (Never Expires), 'Upload Size Limit (MB)' (Limited, 1024), 'Email File Change Notifications' (YES), and 'Enable Password Protection' (YES, 56gebnm). The 'Share Permissions' section shows 'Allow Everyone' with 'View + Download + Upload' permissions. A table below lists permissions for 'Guest' with columns for View, Download, Upload, Share, Sync, and Misc. At the bottom, there are 'Revoke Share' and 'Close' buttons.

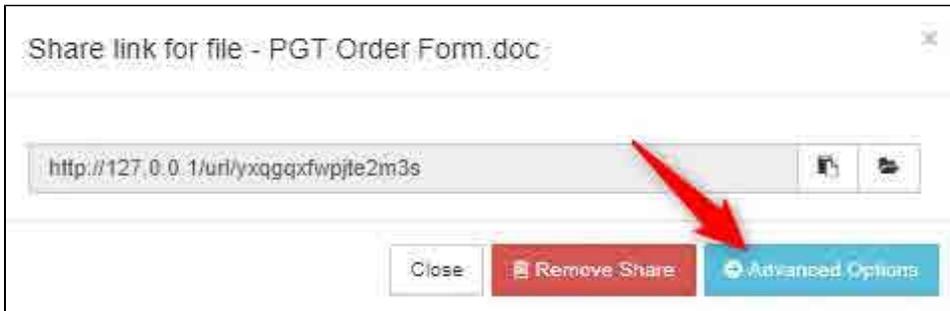
# Sharing Files Publicly

You can share a file so that anyone can access the file even if they don't have a FileCloud account.

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

When you share a file:

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



In this section:

- [Public Share Options for Files](#)
- [Set Share Preview For Public Folder Shares](#)
- [Sharing Files Publicly with An Expiration Date](#)
- [Sharing Files Publicly with Everyone](#)
- [Sharing Files Publicly with Password](#)

# Public Share Options for Files



In the User Portal, you can configure how you share a file and with which users.

You can configure share options when:

- You first create the Share using *Advanced Options* - this button is available on the window that opens after you right-click a file and then select Share.
- After you create the share using *Manage Share* - this button is available in Shared Files after you select a file that is already being shared.

Both of these options open the Manage Share window. The Manage Share window contains two panels for configuring access.

SHARE OPTIONS panel	SHARE PERMISSIONS panel
<div><h3>Share Options</h3><p>Shared File/Folder <input type="text" value="/me/Sub1/DICOM_Video.mp"/></p><p>Share Name <input type="text" value="xZa4aasFcLAzHIBq"/></p><p>Expires (Optional) <input checked="" type="radio"/> Never Expires <input type="radio"/> Expires</p><p>Restrict Downloads (Optional) <input checked="" type="radio"/> No Restrictions <input type="radio"/> Restrict to</p><p>Email File Change Notifications <input checked="" type="radio"/> YES <input type="radio"/> NO</p><p>Enable Password Protection <input type="radio"/> YES <input checked="" type="radio"/> NO</p><p><input type="button" value="Update"/></p></div>	<div><h3>Share Permissions</h3><p><input checked="" type="radio"/> Allow Everyone <input type="radio"/> Allow Selected Users/Groups</p><p><b>Guest</b> Group</p><p><input type="button" value="Add Guest"/></p><p>Guest</p><p>Share permitted for all. No gu</p></div>

## What Do You Want to Do?

Click on a topic to expand it.



[Video of Public Share Advanced Options](#)

In the Manage Share for file window, you can set the following SHARED OPTIONS:

Option	Settings	Description
Share File/Folder	current location of the file	Although you can type in this field and click Update, you cannot change the folder path here.  To change the location of the file, right-click and select Move.
Share Name	a randomly-generated name	
Expires	<ul style="list-style-type: none"> <li>• Never Expires</li> <li>• Expires</li> </ul>	By default, this is set to Never Expires.  If set to Expires, identifies a date in the future when this file is no longer shared. When a share expires, the link only becomes unusable to other users. The file is not removed or changed when the sharing link expires.
Restrict Downloads	<ul style="list-style-type: none"> <li>• No Restrictions</li> <li>• Restricted mode</li> </ul>	<ul style="list-style-type: none"> <li>• No Restrictions - allows any user to download a file an unlimited number of times. This is the default setting.</li> <li>• Restricted mode - allows any users to download a file a limited number of times.</li> </ul>
Email File Change Notifications	<ul style="list-style-type: none"> <li>• YES</li> <li>• NO</li> </ul>	By default, this is set to YES.  <ul style="list-style-type: none"> <li>• If set to YES, then an email notification is sent when a file is opened or downloaded for a public share.</li> </ul>
Enable Password Protection	<ul style="list-style-type: none"> <li>• YES</li> <li>• NO</li> </ul>	By default, this is set to NO.  If set to YES, then a user who wants to access this file must provide a password first.  When you share this link through the FileCloud email template, the password information will be given.

To configure how a file is shared:

1. Open a browser.
2. Log on to the User Portal.
3. If the file is not yet being shared, click *My Files*, select the file, then click *Share*.
4. If the file is already being shared, click *Shared Files*, select the file, then click *Manage Share*.
5. On the *Manage Share* for file window, in *Share Options*, to set a date when you want to stop sharing the file, select *Expires* and then either select a date using the calendar icon or type in a future date.
6. If you want to restrict the number of times a file can be downloaded, select *Restrict To* and then type in a number between 0 and .
7. To disable sending an email notification when a file is opened or downloaded, in *Email File Change Notifications*, select *No*.
8. To require a user to enter a password before accessing the file, in *Enable Password Protection*, select *YES*. You can either use the randomly generated password or type in one of your own.
9. To save your changes, click *Update*.

In the *Manage Share* window, you can configure who can access the file in the *SHARE PERMISSIONS* panel.



For public sharing, select *Allow Everyone*. If you want more security, you can use the *SHARE OPTIONS* panel to set a password.

To configure public file sharing with everyone:

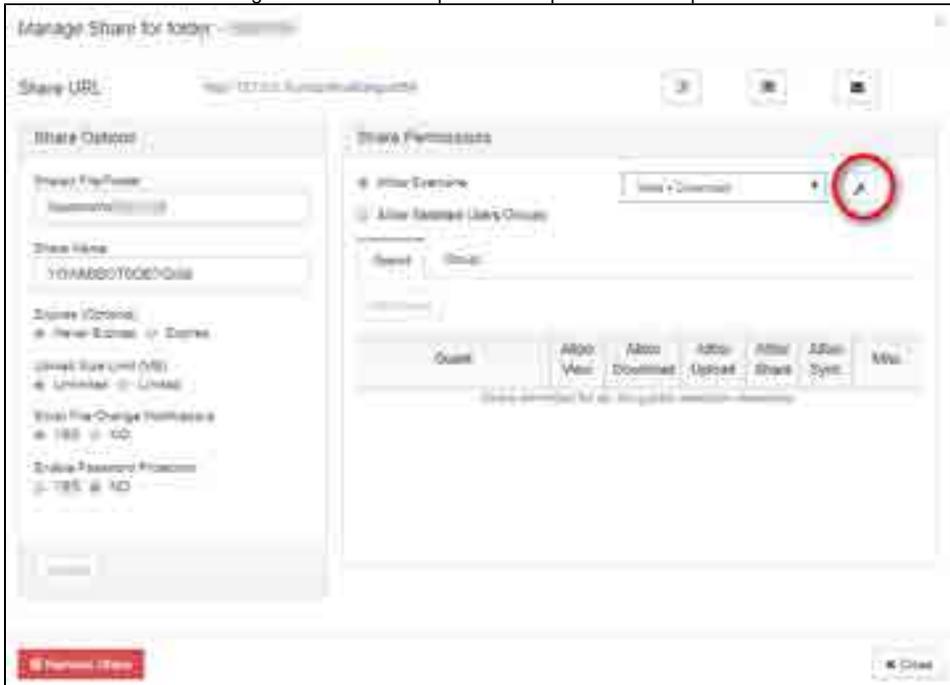
1. Open a browser.
2. Log on to the User Portal.
3. If the file is not yet being shared, click *My Files*, select the file, then click *Share*.
4. If the file is already being shared, click *Shared Files*, select the file, then click *Manage Share*.
5. On the *Manage Share* for file window, in the *Share Permissions* panel, select *Allow Everyone*.
6. To require a user to enter a password before accessing the file, in the *Share Options* panel, in *Enable Password Protection*, select *YES*.
7. You can either use the randomly generated password or type in one of your own.
8. To save your changes, click *Update*.

# Set Share Preview For Public Folder Shares

**i** The ability to select a file as the default preview when sharing a folder in public mode is available in FileCloud version 14.0 and later. This will cause a persistent preview while share recipient browses the share.

To select the preview file:

1. Share a folder for which preview must be set.
2. Open the share details dialog by selecting the shared folder and clicking on 'Manage Share'.
3. Click on the additional settings button next to the public share permissions drop down.



4. In the additional settings dialog, select a preview file by using the file chooser dialog.



5. Once the preview file is selected, click on 'Save' button to save the selection.

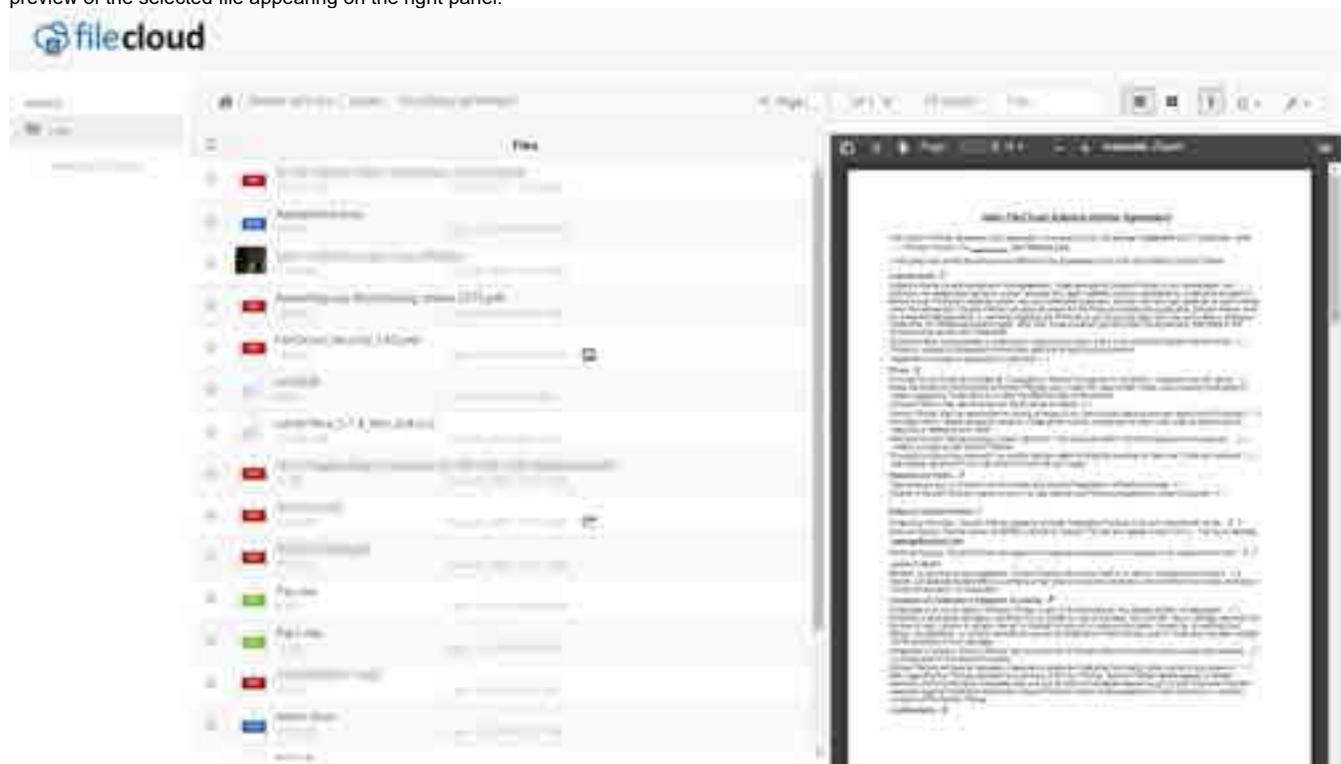
**i** **Note**

The preview file can be only within the shared folder. It cannot be a file from outside this folder tree.



## Viewing share with preview

The share with preview is to be viewed similar to a regular public share. Opening the share link from a browser will display the share contents with the preview of the selected file appearing on the right panel.



# Sharing Files Publicly with An Expiration Date



You can share a file with any user, even one without a FileCloud account, and then for security reasons you can limit the time the share is available.

- When the share expires, it is not deleted.
- After the share Expires date is passed, the link to the share will no longer work.

That means when you share a file, you can leave the default settings in:

## SHARE PERMISSIONS

- *Allow Everyone* = selected

## SHARE OPTIONS

- *Enable Password Protection* = NO. This allows a user to access a share without first providing a password to access the file.
- *Restrict Downloads* = No Restrictions. This allows any user to download a file an unlimited number of times.
- *Email File Change Notifications* = YES. This sends an email notification when a file is opened or downloaded for a public share.

However, you must set:

- *Expires* = selected

## To share a file with everyone and require a password:

1. Open a browser and log in to the *User Portal*.
2. In the *User Portal*, click *My Files*.
3. Select the file you want to share.
4. Click the *Share* button.
5. In the *Share Link* dialog box, click *Advanced Options*.
6. On the *Manage Share* dialog box, in *Share Options*, select the radio button for *Expires (Optional)*.
7. Use the calendar button to select a date or type in a date for when the share will no longer be available.
8. To save your changes, click *Update*.
9. To send an email with the link and the expiration date to a user, click the email button.
10. On the *Send Share via Email* dialog, type in your *Name* and *Email*, and the email address you want to send the message to.
11. To send the message, click *Send Email*.

## Share Options

Shared File/Folder

/me/FileCloud Server Admin

Share Name

5rUlaO4mSxcP9GD0

Expires (Optional)

Never Expires  Expires



Restrict

No

Email

YES

Enable

YES

Update

← **January 2019** →

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

# Sharing Files Publicly with Everyone



You can share a file with everyone without restrictions.

That means when you share a file, you can leave the default settings as:

## SHARE OPTIONS

- *Expires* = **Never Expires**
- *Restrict Downloads* = **No Restrictions**. This allows any user to download a file an unlimited number of times.
- *Email File Change Notifications* = **YES**. This sends an email notification when a file is opened or downloaded for a public share.
- *Enable Password Protection* = **NO**. This allows a user to access a file without first providing a password.

## SHARE PERMISSIONS

- *Allow Everyone* = **selected**

To share a file with everyone without restrictions:

1. Open a browser and log in to the *User Portal*.
2. In the *User Portal*, click *My Files*.
3. Select the file you want to share.
4. Click the *Share* button.
5. On the *Share Link for File*, copy the URL and then click *Close*.

# Sharing Files Publicly with Password

 The ability to share publicly but still require a password to access the share is available in FileCloud Server version 13.0 and later.

## CAPTCHA

Beginning with FileCloud version 19.3, users will be asked to complete a CAPTCHA form after a certain number of failed attempts to access a password-protected file.



You can share a file with any user, even one without a FileCloud account, and then for security you can require a password.

That means when you share a file, you can leave the default settings in:

### SHARE PERMISSIONS

- *Allow Everyone* = selected

### SHARE OPTIONS

- *Expires* = Never Expires
- *Restrict Downloads* = No Restrictions. This allows any user to download a file an unlimited number of times.
- *Email File Change Notifications* = YES. This sends an email notification when a file is opened or downloaded for a public share.

However, you must set:

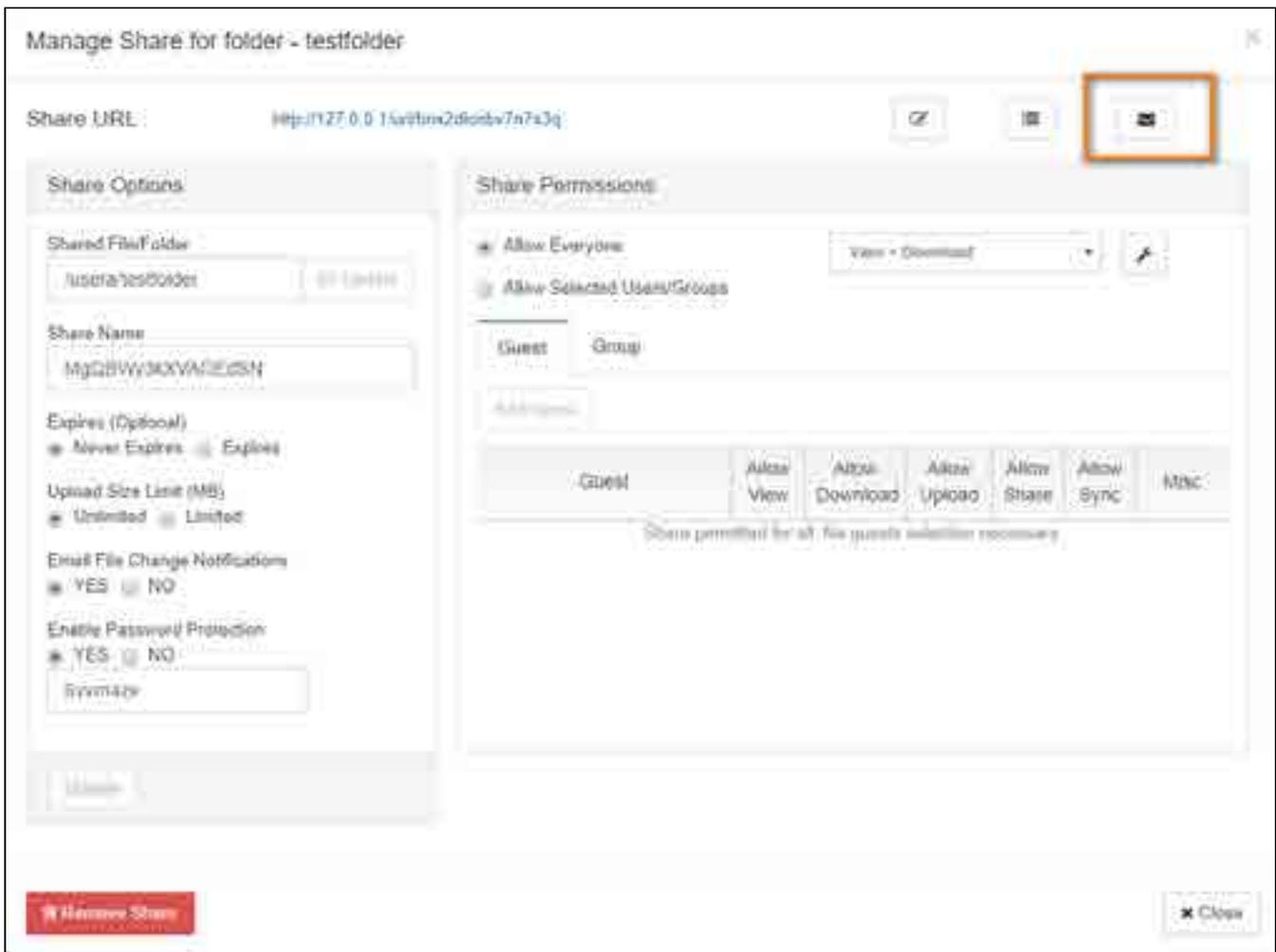
- *Enable Password Protection* = YES. This requires a user to first provide a password before accessing the file.

FileCloud will create a randomly-generated strong password, or you can set your own.

 When you share this link through the FileCloud email template, the password information will be given.

### To share a file with everyone and require a password:

1. Open a browser and log in to the *User Portal*.
2. In the *User Portal*, click *My Files*.
3. Select the file you want to share.
4. Click the *Share* button.
5. In the *Share Link* dialog box, click *Advanced Options*.
6. On the *Manage Share* dialog box, in *Share Options*, for *Enable Password Protection*, select *Yes*.
7. A random password is created and set automatically. To change the password, remove the password and type in your own.
8. To save your changes, click *Update*.
9. To send an email with the link and password to a user, click the email button.
10. On the *Send Share via Email* dialog, type in your *Name* and *Email*, and the email address you want to send the message to.
11. To send the message, click *Send Email*.



Anyone you share this information with can access the shared file, but first they are prompted to enter the password.



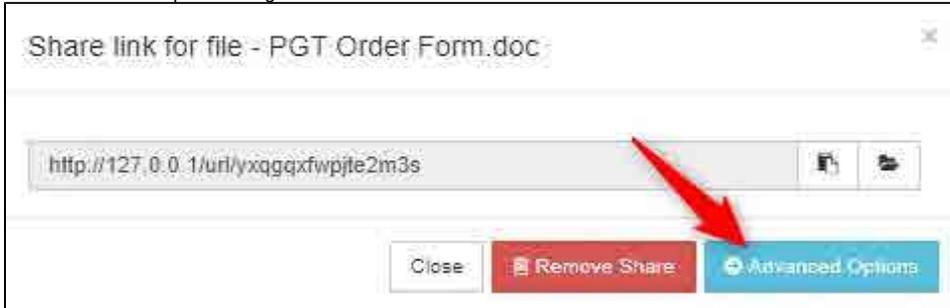
# Sharing Files Privately

You can share a file only with users who have a FileCloud account.

- This provides more security when sharing files.
- This is useful when you only have a small number of people you want to share with.
- You can share a file with existing FileCloud users or groups.
- You can share a file and invite the user to create a FileCloud account.

When you share a file privately:

- A Share Link window opens to provide the link.
- By default the file can be accessed by external users.
- You need to click Advanced to set sharing restrictions.
- You can edit and send an email inviting new or existing FileCloud users to access the file.
- You become the share owner for that file.
- The user will be required to log in with a FileCloud account to access the file on the User Portal.



## In this section

- [Private Share Permission Options for Files](#)
- [Sharing Files Privately with Existing Users](#)
- [Sharing Files Privately with New Users](#)

# Private Share Permission Options for Files



Private Sharing means you are only allowing users with a FileCloud account to access your file.

On the Manage Share window, in the SHARE PERMISSIONS panel, when you choose

- Allow Selected Users or Groups

You will be able to lookup users and groups who have a FileCloud account, add them as a Guest, and then send them an email with the link.

For each guest that you add, you can assign the permissions as shown in Table 1.

Table 1. Permission options for private shares

Permission	Description
Allow View	Read access will allow users to view, browse or download files, Removing view access will remove the user from the share completely.
Allow Download	This will allow the user to save the file
Allow Share	Share access will allow users to re-share files or folders with other users of their choosing. Sharing access can be provided only if View and Upload access are already provided.

# Sharing Files Privately with Existing Users



You can share a file with a user who has a FileCloud account.

This is called a Private share.

- Private Sharing means you are only allowing users with a FileCloud account to access your file.
- You can add Users and Groups.
- You will be able to lookup email addresses, add them as a Guest, and then send them an email with the link.

That means when you privately share a file, you can leave the default settings in:

## SHARE OPTIONS

- *Expires* = **Never Expires**
- *Restrict Downloads* = **No Restrictions**. This allows any user to download a file an unlimited number of times.
- *Email File Change Notifications* = **YES**. This sends an email notification when a file is opened or downloaded for a public share.
- *Enable Password Protection* = **NO**. This allows a user to access a file without first providing a password.

However, you must make changes in:

## SHARE PERMISSIONS

- *Allow Selected Users/Groups* = **selected**. This allows you to specify which FileCloud users and groups can access the file and their permissions, as shown in Table 1.

Table 1. Permission options for private shares

Permission	Description
Allow View	Read access will allow users to view, browse or download files, Removing view access will remove the user from the share completely.
Allow Download	This will allow the user to save the file
Allow Share	<ul style="list-style-type: none"><li>• Allows the user to share your file with other users.</li><li>• Sharing access can be provided only if View and Upload access are already provided.</li></ul>



Watch a video on creating a private share.

To share a file with existing FileCloud users:

1. Open a browser and log in to the User Portal.
2. In the *User Portal*, click *My Files*.
3. Select the file you want to share.
4. Click the *Share* button.
5. In the *Share Link* dialog box, click *Advanced Options*.
6. On the *Manage Share* dialog box, in *Share Permissions*, select *Allow Selected Users/Groups*.
7. To add a FileCloud user, select the *Guest* tab, and then click *Add Guest*.
8. In the *Search Users* dialog box, type in the user's account or email address, and then click *Search*.
9. Select the user who you want to share with.
10. In the *Share Notification Email* dialog, you can edit the contents of the email and then click *Send*, or to not send the email, click *Cancel*.
11. On the *Manage Share* dialog box, in *Share Permissions*, select the guest you just added.
12. To set permissions, check any of the following options: *Allow View*, *Allow Download*, *Allow Share*.
13. To save your changes, click *Update*.

# Sharing Files Privately with New Users



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



Before you can invite a new user to create a FileCloud account, an administrator must configure the FileCloud site to allow it.

If you are not able to invite a new user to access your share, contact your administrator about allowing new user account creation.

If you are an administrator, follow these instructions to allow new users to create an account.



[Enable New Account Creation Requests](#)



[Allow Users to Create a New Disabled Account](#)



[Allow Users to Create and Approve Accounts](#)

This is called a Private share because:

- You are only allowing users with a FileCloud account to access your file.

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

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

An account with Full Access has its own private cloud storage space in the "My Files" area.

These users can:

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

That means when you privately share a file, you can leave the default settings in:

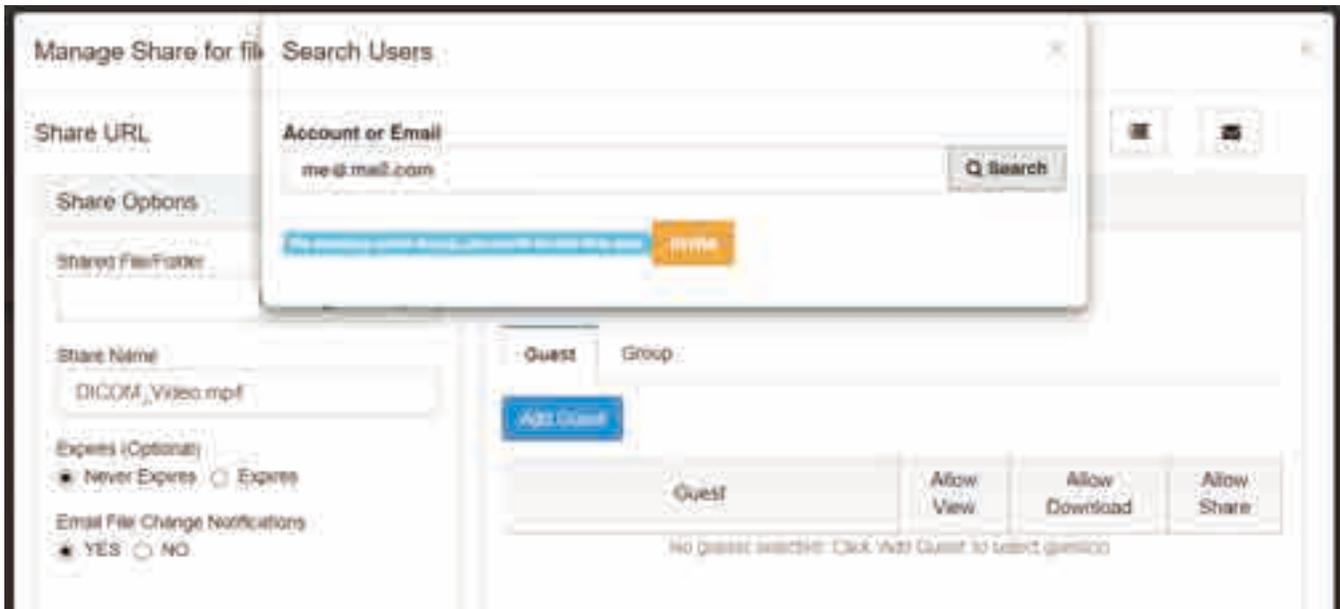
## SHARE OPTIONS

- *Expires* = **Never Expires**
- *Restrict Downloads* = **No Restrictions**. This allows any user to download a file an unlimited number of times.
- *Email File Change Notifications* = **YES**. This sends an email notification when a file is opened or downloaded for a public share.
- *Enable Password Protection* = **NO**. This allows a user to access a file without first providing a password.

However, you must make changes in:

## SHARE PERMISSIONS

- *Allow Selected Users/Groups* = **selected**. This allows you to specify who you want to invite to create a FileCloud account so that they can access the file.



To share a file with a new FileCloud user:

1. Open a browser and log in to the User Portal.
2. In the *User Portal*, click *My Files*.
3. Select the file you want to share.
4. Click the *Share* button.
5. In the *Share Link* dialog box, click *Advanced Options*.
6. On the *Manage Share* dialog box, in *Share Permissions*, select *Allow Selected Users/Groups*.
7. To invite a new user, select the *Guest* tab, and then click *Add Guest*.
8. In the *Search Users* dialog box, type in the user's email address, and then click *Search*.
9. You will see a message telling you no user was found.
10. In the *Search* dialog box, click *Invite*.
11. In the *Share Notification Email* dialog, you can edit the contents of the email and then click *Send*.
12. You will see a message about the Email Status. read it and then click *Close*.
13. On the *Manage Share* dialog box, in *Share Permissions*, select the guest you just added.
14. To set permissions, check any of the following options: *Allow View*, *Allow Download*, *Allow Share*.
15. To save your changes, click *Update*.

# Sharing Folders



You can share a folder many ways.

## Publicly

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

## Privately

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



In the User Portal, you can click on the root folder, *My Files*, and select *Share*. This is a security threat and should not be allowed.

In FileCloud Server version 19.1 and later:

- In the User Portal, when you click on the root folder, *My Files*, you will no longer have the Sharing option!

## What do you want to do?



[Watch a video on folder sharing](#)



[Share a Folder Publicly](#) *No FileCloud account required.*



[Share a Folder Privately](#) *FileCloud account required.*



Configure other sharing options



[Set Restrictions on Downloads](#)



[Set an Upload Size Limit](#)

# Share a Folder Privately



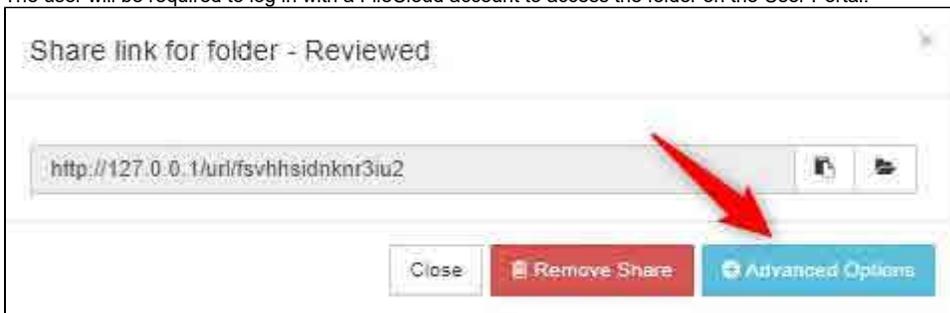
The ability to re-share and also manage subsequent shares that have been created from your original share is available in FileCloud version 18.2

You can share a folder and all its contents only with users who have a FileCloud account.

- This provides more security when sharing folders and their contents.
- This is useful when you only have a small number of people you want to share with.
- You can share a folder and its contents with existing FileCloud users or groups.
- You can share a folder and its contents and invite a new user to create a FileCloud account.

When you share a folder and all its contents privately:

- A Share Link window opens to provide the link.
- By default the folder can be accessed by external users.
- You need to click Advanced to set sharing restrictions.
- You can edit and send an email inviting new or existing FileCloud users to access the folder and all its contents.
- You become the share owner for that folder and its contents.
- The user will be required to log in with a FileCloud account to access the folder on the User Portal.



As a private share owner, you now have the ability to:

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

## In this section

- [Allow Share Members to Manage Re-Shares](#)
- [Private Share Permissions for Folders](#)
- [Share a Folder Privately with New Users](#)
- [Share a Folder with Existing Users](#)

# Allow Share Members to Manage Re-Shares

**i** User ability to re-share and also manage subsequent folder shares that have been created from your original share is available in FileCloud version 18.2.

Groups have the ability to re-share folders, but are not able to manage the folder shares.

Once you share a folder privately, it has the ability to be shared again by members.

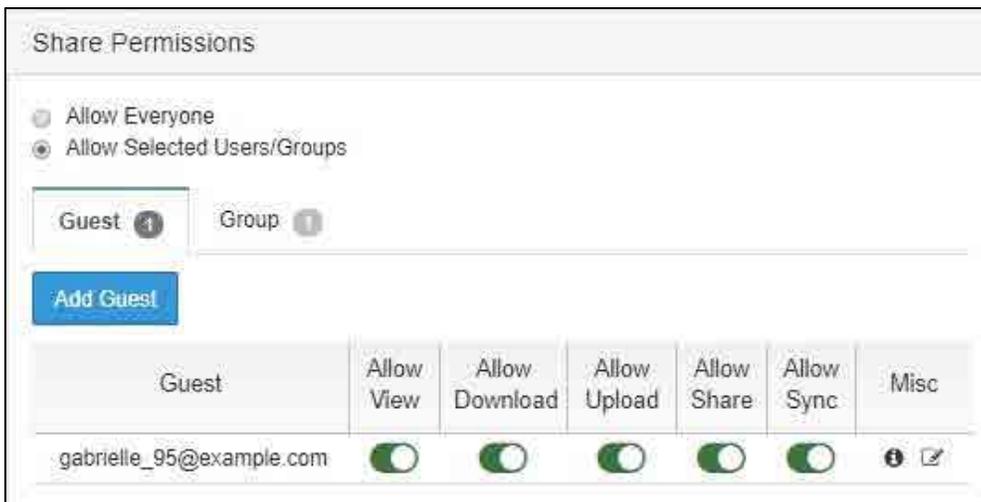
Now you can also designate another user to manage those re-shares of your original shared file.



As a private share owner, you have the ability to allow others to manage re-sharing in the following ways:

- **View and manage re-shares** - This means managing shares created by other users from your shared files
- **Assign managers to view and manage re-shares** - This means allowing others to manage shares created by other users from your shared files, including removing permissions and users from the share

## How To Allow Managing of Re-Shares



**i** Managing re-share permissions can be granted to a user who already has the following permissions:

- Allow View
- Allow Download
- Allow Upload
- Allow Share

To allow a share member to manage a folder re-share:

1. Open a browser and log on to the *User Portal*.
2. On the left navigation panel, click *Files*.

3. Open the folder you want to share.
4. If the folder is already being shared, in the *Details* pane on the right, in the *Sharing* section, click *Manage*, and then skip to step 8.
5. If the folder is not yet being shared, in the *Details* pane on the right, in the *Sharing* section, click *+Share*.
6. On the *Confirm* dialog box, click *OK*.
7. On the *Share Link* dialog box, click *Advanced Options*.
8. On the *Manage Share for Folder* window, in the *Share Permissions* panel, select *Allow Selected Users/Groups*.
9. To add a user, select the *Guest* tab and then click *Add Guest*.
10. To add a group, select the *Group* tab and then click *Add Group*.
11. On the *Search* screen, type in the user's or group's account name.
12. In the *Share Notification* dialog box, review the email to be sent to the selected user or group, and then click *Send*.
13. In *Share Permissions*, select the following level of permissions: *Allow View*, *Allow Download*, *Allow Upload*, *Allow Share*.
14. In *Share Permissions*, under *Misc.*, select the edit icon .
15. On the *Miscellaneous Permissions* dialog box, select *Allow Manage*, and then click *Save*.
16. Optionally you can select any of the other permission checkboxes.
17. To save your changes, click *Update*

## Managing Re-Shares

After you allow a user to manage re-shares, they will see the following icon

in their dashboard on the *Shared with Me* file list:



The above screenshot shows that you are a manager for 2 shares:

- cars folder
- test123 folder

Although the food folder has been shared with you, you are not allowed to manage it.

In the *Details* panel in the next column, in the *Sharing* section, you can see:

- You have shared the Cars folder with 2 other users.
- The user *satad* shared this privately with you first
- The user *satad* allowed you to manage re-shares

The user will also be notified of activity on that same screen in the *Details* panel:



# Private Share Permissions for Folders

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



Private Sharing means you are only allowing users with a FileCloud account to access your folder.

### Share Permissions

Allow Everyone  
 Allow Selected Users/Groups

Guest
Group

Add Guest

Guest	Allow View	Allow Download	Allow Upload	Allow Share	Allow Sync	Misc
No guests selected. Click 'Add Guest' to select guest(s).						

 You can invite someone to create a FileCloud account so you can share with them.

On the Manage Share window, in the SHARE PERMISSIONS panel, when you choose

- Allow Selected Users or Groups

You will be able to lookup users and groups who have a FileCloud account, add them as a Guest, and then send them an email with the link.

For each guest that you add, you can assign the permissions as shown in Table 1.

Table 1. Permission options for private folder sharing

Permission	Description
Allow View	Read access will allow users to view, or browse files in the folder. Removing view access will remove the user from the share completely.
Allow Download	This will allow the user to save a file from the FileCloud folder to a local device such as a desktop or cell phone.
Allow Upload	This will allow the user to: <ul style="list-style-type: none"> <li>Add a file to the shared folder</li> <li>Delete folders inside the shared folder</li> <li>Modify files inside the shared folder</li> <li>Create new folders inside the shared folder</li> </ul>
Allow Share	This will allow the user to shared the folder contents again with others of their choosing.  Sharing access can be provided only if View and Upload access are already provided.

Allow Sync	<p>Sync access will allow users to synchronize the contents of the shares using their FileCloud Sync app.</p> <p>Note: This option is only available for Shared Folders only. Individual files cannot be synced to other users.</p> <p>Note: This option is not available for Network Shares.</p>
Misc.	<p>Allow Delete</p> <p>This will allow users to delete a file from the folder.</p> <p>Notes:</p> <ul style="list-style-type: none"><li>• Files can be deleted only when upload access is set on the folder.</li><li>• Folders can be given upload permissions but not delete permission.</li></ul>

# Share a Folder Privately with New Users



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

This is called a Private share because:

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

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

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

An account with Full Access has its own private cloud storage space in the "My Files" area.

These users can:

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

That means when you privately share a file, you can leave the default settings in:

## SHARE OPTIONS

- *Expires* = **Never Expires**
- *Restrict Downloads* = **No Restrictions**. This allows any user to download a file an unlimited number of times.
- *Email File Change Notifications* = **YES**. This sends an email notification when a file is opened or downloaded for a public share.
- *Enable Password Protection* = **NO**. This allows a user to access a file without first providing a password.

However, you must make changes in:

## SHARE PERMISSIONS

- *Allow Selected Users/Groups* = **selected**. This allows you to specify who you want to invite to create a FileCloud account so that they can access your folder and all its contents.

Search Users

Account or Email

me@mail.com

Q Search

No existing users found, use Invite to add this user

Invite

After you select a new user to invite, you can set permissions.

Table 1. Permission options for private folder sharing

Permission	Description
Allow View	Read access will allow users to view, or browse files in the folder. Removing view access will remove the user from the share completely.
Allow Download	This will allow the user to save a file from the FileCloud folder to a local device such as a desktop or cell phone.

Allow Upload	<p>This will allow the user to:</p> <ul style="list-style-type: none"> <li>• Add a file to the shared folder</li> <li>• Delete folders inside the shared folder</li> <li>• Modify files inside the shared folder</li> <li>• Create new folders inside the shared folder</li> </ul>
Allow Share	<p>This will allow the user to shared the folder contents again with others of their choosing.</p> <p>Sharing access can be provided only if View and Upload access are already provided.</p>
Allow Sync	<p>Sync access will allow users to synchronize the contents of the shares using their FileCloud Sync app.</p> <p>Note: This option is only available for Shared Folders only. Individual files cannot be synced to other users.</p> <p>Note: This option is not available for Network Shares.</p>
Misc.	<p>Allow Delete</p> <p>This will allow users to delete a file from the folder.</p> <p>Notes:</p> <ul style="list-style-type: none"> <li>• Files can be deleted only when upload access is set on the folder.</li> <li>• Folders can be given upload permissions but not delete permission.</li> </ul>

To share a folder and its contents with a new FileCloud user:

1. Open a browser and log in to the User Portal.
2. In the *User Portal*, click *My Files*.
3. Select the folder you want to share.
4. If the folder is already being shared, in the *Details* pane on the right, in the *Sharing* section, click *Manage*, and then skip to step 8.
5. If the folder is not yet being shared, in the *Details* pane on the right, in the *Sharing* section, click *+Share*.
6. On the *Confirm* dialog box, click *OK*.
7. In the *Share Link* dialog box, click *Advanced Options*.
8. On the *Manage Share* dialog box, in *Share Permissions*, select *Allow Selected Users/Groups*.
9. To invite a new user, select the *Guest* tab, and then click *Add Guest*.
10. In the *Search Users* dialog box, type in the user's email address, and then click *Search*.
11. You will see a message telling you no user was found.
12. In the *Search* dialog box, click *Invite*.
13. In the *Share Notification Email* dialog, you can edit the contents of the email and then click *Send*.
14. You will see a message about the Email Status. Read it and then click *Close*.
15. On the *Manage Share* dialog box, in *Share Permissions*, select the guest you just added.
16. To set permissions, check any of the following options: *Allow View*, *Allow Download*, *Allow Upload*, *Allow Share*, *Allow Sync*, *Misc*.
17. To save your changes, click *Update*.

# Share a Folder with Existing Users



You can share a folder only with users who already have an existing FileCloud account.

### Share Permissions

Allow Everyone  
 Allow Selected Users/Groups

Guest    Group

Add Guest

Guest	Allow View	Allow Download	Allow Upload	Allow Share	Allow Sync	Misc
No guests selected. Click 'Add Guest' to select guest(s).						



As a private share owner, you now have the ability to:

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

When you share the folder and its contents, you can leave the default settings as:

#### SHARE OPTIONS

- *Expires* = **Never Expires**
- *Restrict Downloads* = **No Restrictions**. This allows any user to download a file an unlimited number of times.
- *Email File Change Notifications* = **YES**. This sends an email notification when a file is opened or downloaded for a public share.
- *Enable Password Protection* = **NO**. This allows a user to access a file without first providing a password.

However, in the Share Permissions panel, you must make the following changes:



For private sharing, select *Allow Selected Users/Groups*. You will be required to find the user or group FileCloud account and select one of the following options:

Table 1. Permission options for private folder sharing

Permission	Description
Allow View	Read access will allow users to view, or browse files in the folder.  Removing view access will remove the user from the share completely.
Allow Download	This will allow the user to save a file from the FileCloud folder to a local device such as a desktop or cell phone.
Allow Upload	This will allow the user to: <ul style="list-style-type: none"> <li>• Add a file to the shared folder</li> <li>• Delete folders inside the shared folder</li> <li>• Modify files inside the shared folder</li> <li>• Create new folders inside the shared folder</li> </ul>

Allow Share	<p>This will allow the user to shared the folder contents again with others of their choosing.</p> <ul style="list-style-type: none"> <li>• Sharing access can be provided only if View and Upload access are already provided.</li> </ul>
Allow Sync	<p>Sync access will allow users to synchronize the contents of the shares using their FileCloud Sync app.</p> <p>Note: This option is only available for Shared Folders only. Individual files cannot be synced to other users.</p> <p>Note: This option is not available for Network Shares.</p>
Misc. - Allow Delete	<p>This will allow users to delete a file from the folder.</p> <p>Notes:</p> <ul style="list-style-type: none"> <li>• Files can be deleted only when upload access is set on the folder.</li> <li>• Folders can be given upload permissions but not delete permission.</li> </ul>
Misc. - Allow Manage	<p>Assigns a user as a Share Owner.</p> <ul style="list-style-type: none"> <li>• Share Owners can view and manage shares created from their shared folders by other users.</li> <li>• Share Owners can assign managers to view and manage shares created from their shared folders by other users.</li> </ul> <p> For more information, read about <a href="#">Allowing Members to Manage Re-Shares</a></p>

To configure private folder sharing with existing FileCloud Users:

1. Open a browser and log on to the *User Portal*.
2. On the left navigation panel, click *Files*.
3. Open the folder you want to share.
4. If the folder is already being shared, in the *Details* pane on the right, in the *Sharing* section, click *Manage*, and then skip to step 8.
5. If the folder is not yet being shared, in the *Details* pane on the right, in the *Sharing* section, click +Share.
6. On the *Confirm* dialog box, click *OK*.
7. On the *Share Link* dialog box, click *Advanced Options*.
8. On the Manage Share for Folder window, in the *Share Permissions* panel, select *Allow Selected Users/Groups*.
9. To add a user, select the *Guest* tab and then click *Add Guest*.
10. To add a group, select the *Group* tab and then click *Add Group*.
11. On the *Search* screen, type in the user's or group's account name.
12. In the *Share Notification* dialog box, review the email to be sent to the selected user or group, and then click *Send*.
13. In *Shared Permissions*, select the checkbox for each permission you want to grant.
14. To save your changes, click *Update*.

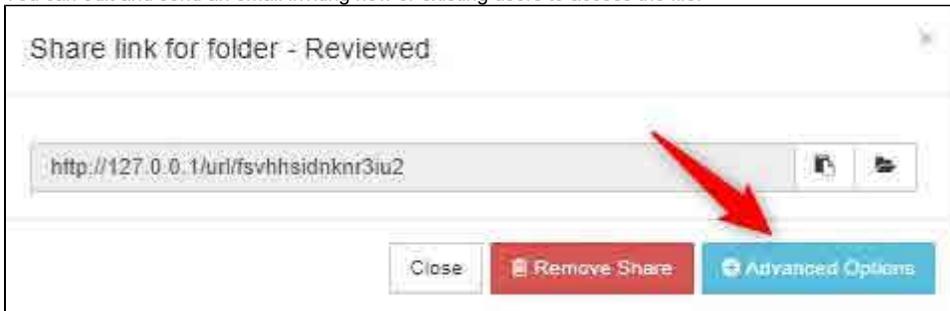
# Sharing Folders Publicly

You can share a folder so that anyone can access the contents even if they don't have a FileCloud account.

- When you share a folder, you are required to select permissions for viewing, uploading, and downloading folder contents.
- If you want more security but still want a large number of people to access the folder contents, you can enable password protection.
- For additional security, and if you only want a small number of people to access the folder contents, you can choose to share the file privately.

When you share a folder:

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



## In this section

- [Public Share Options for Folders](#)
- [Share a Folder Publicly with Password](#)
- [Share a Folder with Everyone](#)

# Public Share Options for Folders



In the User Portal, you can configure how you share a folder and with which users.

You can configure share options when:

- You first create the Share using *Advanced Options* - this button is available on the window that opens after you right-click a file and then select Share.
- After you create the share using *Manage Share* - this button is available in Shared Files after you select a file that is already being shared.

Both of these options open the Manage Share window. The Manage Share window contains two panels for configuring access.

SHARE OPTIONS panel	SHARE PERMISSIONS panel
<div data-bbox="149 569 797 1577"> <h3>Share Options</h3> <p>Shared File/Folder  <input type="text" value="/me/Sub1"/></p> <p>Share Name  <input type="text" value="xZa4aasFcLAzHIBq"/></p> <p>Expires (Optional)  <input checked="" type="radio"/> Never Expires <input type="radio"/> Expires</p> <p>Restrict Downloads (Optional)  <input checked="" type="radio"/> No Restrictions <input type="radio"/> Restrict to</p> <p>Email File Change Notifications  <input checked="" type="radio"/> YES <input type="radio"/> NO</p> <p>Enable Password Protection  <input type="radio"/> YES <input checked="" type="radio"/> NO</p> <p><input type="button" value="Update"/></p> </div>	<div data-bbox="841 569 1490 919"> <h3>Share Permissions</h3> <p><input checked="" type="radio"/> Allow Everyone</p> <p><input type="radio"/> Allow Selected Users/Groups</p> <div data-bbox="1435 680 1497 869" style="border: 1px solid black; padding: 2px;"> <p>View</p> <p>View</p> <p>View</p> <p>View</p> <p>Up</p> </div> </div>

## What Do You Want to Do?

Click on a topic to expand it.

In the Manage Share for file window, you can set the following SHARED OPTIONS:

Option	Settings	Description
--------	----------	-------------

Share File/Folder	current location of the folder	Although you can type in this field and click Update, you cannot change the folder path here.  To change the location of the folder, in the User Dashboard, right-click the folder and select Move.
Share Name	a randomly-generated name	
Expires	<ul style="list-style-type: none"> <li>• Never Expires</li> <li>• Expires</li> </ul>	By default, this is set to Never Expires.  If set to Expires, identifies a date in the future when this folder is no longer shared. When a share expires, the link only becomes unusable to other users. The folder is not removed or changed when the sharing link expires.
Restrict Downloads	<ul style="list-style-type: none"> <li>• No Restrictions</li> <li>• Restricted mode</li> </ul>	<ul style="list-style-type: none"> <li>• No Restrictions - allows any user to download the folder contents an unlimited number of times. This is the default setting.</li> <li>• Restricted mode - allows any users to download the folder contents a limited number of times.</li> </ul>
Email File Change Notifications	<ul style="list-style-type: none"> <li>• YES</li> <li>• NO</li> </ul>	By default, this is set to YES.  <ul style="list-style-type: none"> <li>• If set to YES, then an email notification is sent when a file in the folder is opened or downloaded for a public share.</li> </ul>
Enable Password Protection	<ul style="list-style-type: none"> <li>• YES</li> <li>• NO</li> </ul>	By default, this is set to NO.  If set to YES, then a user who wants to access this file must provide a password first.  When you share this link through the FileCloud email template, the password information will be given.

To configure how a file is shared:

1. Open a browser and log on to the User Portal.
2. On the left navigation panel, click Files.
3. Open the folder you want to share.
4. If the folder is already being shared, in the *Details* pane on the right, in the *Sharing* section, click *Manage*, and then skip to step 8.
5. If the folder is not yet being shared, in the *Details* pane on the right, in the *Sharing* section, click *+Share*.
6. On the *Confirm* dialog box, click *OK*.
7. On the *Share Link* dialog box, click *Advanced Options*.
8. On the *Manage Share for folder* window, in *Share Options*, to set a date when you want to stop sharing the file, select *Expires* and then either select a date using the calendar icon or type in a future date.
9. If you want to restrict the number of times the folder contents can be downloaded, select *Restrict To* and then type in a number greater than 0.
10. To disable sending an email notification when a file is opened or downloaded, in *Email File Change Notifications*, select *No*.
11. To require a user to enter a password before accessing the file, in *Enable Password Protection*, select *YES*. You can either use the randomly generated password or type in one of your own.
12. To save your changes, click *Update*.

In the Manage Share window, you can configure who can access the file in the SHARE PERMISSIONS panel.



For public sharing, select *Allow Everyone*. You will be required to select one of the following options:

Table 1. Permission options for public folder sharing

Permission	Description
View Only	Read access will allow users to view, or browse files in the folder.
Upload Only	This will allow the user to save a file to the FileCloud folder

View + Upload	<p>Allows users to:</p> <ul style="list-style-type: none"> <li>• view files in the folder</li> <li>• browse files in the folder</li> <li>• save a file to the FileCloud folder</li> </ul>
View + Download	<p>Allows users to:</p> <ul style="list-style-type: none"> <li>• view files in the folder</li> <li>• browse files in the folder</li> <li>• save a file in the FileCloud folder to their desktop or client</li> </ul>
View + Upload + Download	<p>Allows users to:</p> <ul style="list-style-type: none"> <li>• view files in the folder</li> <li>• browse files in the folder</li> <li>• save a file to the FileCloud folder</li> <li>• save a file in the FileCloud folder to their desktop or client</li> </ul>

 If you want more security, you can use the SHARE OPTIONS panel to set a password.

**To configure public file sharing with everyone:**

1. Open a browser and log on to the User Portal.
2. On the left navigation panel, click Files.
3. Open the folder you want to share.
4. If the folder is already being shared, in the *Details* pane on the right, in the *Sharing* section, click *Manage*, and then skip to step 8.
5. If the folder is not yet being shared, in the *Details* pane on the right, in the *Sharing* section, click *+Share*.
6. On the *Confirm* dialog box, click *OK*.
7. On the *Share Link* dialog box, click *Advanced Options*.
8. On the *Manage Share for Folder* window, in the *Share Permissions* panel, select *Allow Everyone*.
9. In the dropdown list of permissions, choose the level of permissions you want to grant.
10. To require a user to enter a password before accessing the folder, in the *Share Options* panel, in *Enable Password Protection*, select *YES*.
11. You can either use the randomly generated password or type in one of your own.
12. To save your changes, click *Update*.



Watch a video about Public Share Options

# Share a Folder Publicly with Password

 The ability to share publicly but still require a password to access the share is available in FileCloud Server version 13.0 and later.

## CAPTCHA

Beginning with FileCloud version 19.3, users will be asked to complete a CAPTCHA form after a certain number of failed attempts to access a password-protected folder.



You can share a folder and its contents with any user, even one without a FileCloud account, and then for security you can require a password.

That means when you share a folder, you can leave the default settings in:

### SHARE OPTIONS

- *Expires* = **Never Expires**
- *Restrict Downloads* = **No Restrictions**. This allows any user to download a file in the folder an unlimited number of times.
- *Email File Change Notifications* = **YES**. This sends an email notification when a file in the folder is opened or downloaded for a public share.

However, you must set:

- *Enable Password Protection* = **YES**. This requires a user to first provide a password before accessing a file in the folder.

FileCloud will create a randomly-generated strong password, or you can set your own.

 When you share this link through the FileCloud email template, the password information will be given.

### SHARE PERMISSIONS



For public sharing, select *Allow Everyone*. You will be required to select one of the following options:

Table 1. Permission options for public folder sharing

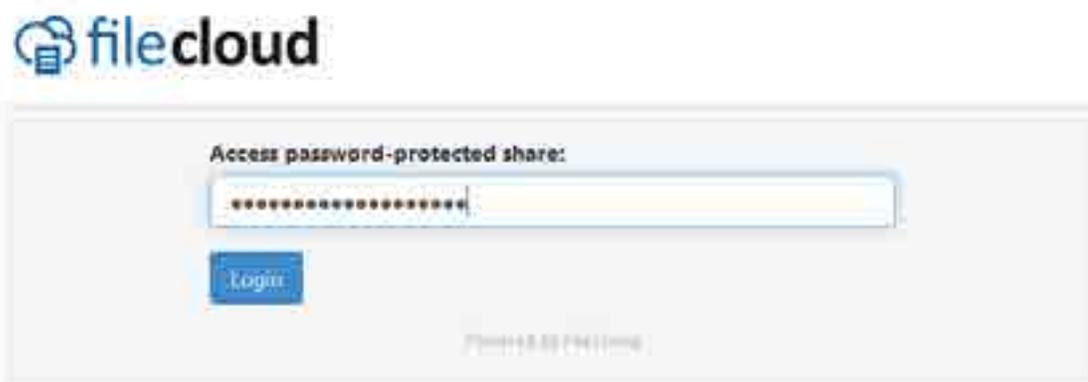
Permission	Description
View Only	Read access will allow users to view, or browse files in the folder.
Upload Only	This will allow the user to save a file to the FileCloud folder
View + Upload	Allows users to: <ul style="list-style-type: none"><li>• view files in the folder</li><li>• browse files in the folder</li><li>• save a file to the FileCloud folder</li></ul>
View + Download	Allows users to: <ul style="list-style-type: none"><li>• view files in the folder</li><li>• browse files in the folder</li><li>• save a file in the FileCloud folder to their desktop or client</li></ul>
View + Upload + Download	Allows users to: <ul style="list-style-type: none"><li>• view files in the folder</li><li>• browse files in the folder</li><li>• save a file to the FileCloud folder</li><li>• save a file in the FileCloud folder to their desktop or client</li></ul>

 If you want more security, you can use the SHARE OPTIONS panel to set a password.

To configure public file sharing with everyone:

1. Open a browser and log on to the User Portal.
2. On the left navigation panel, click Files.
3. Open the folder you want to share.
4. If the folder is already being shared, in the *Details* pane on the right, in the *Sharing* section, click *Manage*, and then skip to step 8.
5. If the folder is not yet being shared, in the *Details* pane on the right, in the *Sharing* section, click *+Share*.
6. On the *Confirm* dialog box, click *OK*.
7. On the *Share Link* dialog box, click *Advanced Options*.
8. On the *Manage Share for Folder* window, in the *Share Permissions* panel, select *Allow Everyone*.
9. In the dropdown list of permissions, choose the level of permissions you want to grant.
10. To require a user to enter a password before accessing the folder, in the *Share Options* panel, in *Enable Password Protection*, select *YES*.
11. You can either use the randomly generated password or type in one of your own.
12. To save your changes, click *Update*

Anyone you share this information with can access the shared file, but first they are prompted to enter the password.



# Share a Folder with Everyone



You can share a folder with everyone without restrictions.

That means when you share the folder and its contents, you can leave the default settings as:

## SHARE OPTIONS

- *Expires* = **Never Expires**
- *Restrict Downloads* = **No Restrictions**. This allows any user to download a file an unlimited number of times.
- *Email File Change Notifications* = **YES**. This sends an email notification when a file is opened or downloaded for a public share.
- *Enable Password Protection* = **NO**. This allows a user to access a file without first providing a password.

However, in the Share Permissions panel, you must make the following changes:



For public sharing, select *Allow Everyone*. You will be required to select one of the following options:

Table 1. Permission options for public folder sharing

Permission	Description
View Only	Read access will allow users to view, or browse files in the folder.
Upload Only	This will allow the user to save a file to the FileCloud folder
View + Upload	Allows users to: <ul style="list-style-type: none"><li>• view files in the folder</li><li>• browse files in the folder</li><li>• save a file to the FileCloud folder</li></ul>
View + Download	Allows users to: <ul style="list-style-type: none"><li>• view files in the folder</li><li>• browse files in the folder</li><li>• save a file in the FileCloud folder to their desktop or client</li></ul>
View + Upload + Download	Allows users to: <ul style="list-style-type: none"><li>• view files in the folder</li><li>• browse files in the folder</li><li>• save a file to the FileCloud folder</li><li>• save a file in the FileCloud folder to their desktop or client</li></ul>

## To configure public file sharing with everyone:

1. Open a browser and log on to the User Portal.
2. On the left navigation panel, click Files.
3. Open the folder you want to share.
4. If the folder is already being shared, in the *Details* pane on the right, in the *Sharing* section, click *Manage*, and then skip to step 8.
5. If the folder is not yet being shared, in the *Details* pane on the right, in the *Sharing* section, click +Share.
6. On the *Confirm* dialog box, click *OK*.
7. On the *Share Link* dialog box, click *Advanced Options*.
8. On the *Manage Share for Folder* window, in the *Share Permissions* panel, select *Allow Everyone*.
9. In the dropdown list of permissions, choose the level of permissions you want to grant.
10. To save your changes, click *Update*

# Viewing Shares

- [Viewing a Single Shared File](#)
- [Sharing Video Files](#)

# Viewing a Single Shared File

When a document is selected and shared to public, it renders in a single file view with preview of the document.

## Note

- Preview of single document share is available for all office documents such as DOC, DOCX, XLS, XLSX, PPT, PPTX, PDF, TXT etc..
- Preview of certain documents require open office document conversion service.
- Shared document can be printed without downloading, by clicking on the 'Print' button.



# Sharing Video Files



On the User Portal, you can upload, share, and play video files.



## Note

Video playback capability is available only for MP4 files.

If you choose to share a video file, you can set restrictions in the following ways: (click on an option to expand it)

In the Manage Share for file window, you can set the following options:

Option	Settings	Description
Share File/Folder	current location of the file	Although you can type in this field and click Update, you cannot change the folder path here.  To change the location of the file, right-click and select Move.
Share Name	a randomly-generated name	
Expires	<ul style="list-style-type: none"> <li>Never Expires</li> <li>Expires</li> </ul>	By default, this is set to Never Expires.  If set to Expires, identifies a date in the future when this file is no longer shared. When a share expires, the link only becomes unusable to other users. The file is not removed or changed when the sharing link expires.
Restrict Downloads	<ul style="list-style-type: none"> <li>No Restrictions</li> <li>Restricted mode</li> </ul>	<ul style="list-style-type: none"> <li>No Restrictions - allows any user to download a file an unlimited number of times. This is the default setting.</li> <li>Restricted mode - allows any users to download a file a limited number of times.</li> </ul>
Email File Change Notifications	<ul style="list-style-type: none"> <li>YES</li> <li>NO</li> </ul>	By default, this is set to YES.  <ul style="list-style-type: none"> <li>If set to YES, then an email notification is sent when a file is opened or downloaded for a public share.</li> </ul>
Enable Password Protection	<ul style="list-style-type: none"> <li>YES</li> <li>NO</li> </ul>	By default, this is set to NO.  If set to YES, then a user who wants to access this file must provide a password first.  When you share this link through the FileCloud email template, the password information will be given.

To configure how a file is shared for everyone to access:

1. Open a browser.
2. Log on to the User Portal.
3. If the file is not yet being shared, click *My Files*, select the file, then click *Share*.
4. If the file is already being shared, click *Shared Files*, select the file, then click *Manage Share*.
5. On the *Manage Share for file window*, in *Share Permissions*, make sure *Allow Everyone* is selected.
6. On the *Manage Share for file window*, in *Share Options*, to set a date when you want to stop sharing the file, select *Expires* and then either select a date using the calendar icon or type in a future date.
7. If you want to restrict the number of times a file can be downloaded, select *Restrict To* and then type in a number between 0 and .
8. To disable sending an email notification when a file is opened or downloaded, in *Email File Change Notifications*, select *No*.
9. To require a user to enter a password before accessing the file, in *Enable Password Protection*, select *YES*. You can either use the randomly generated password or type in one of your own.

10. To save your changes, click *Update*.

For public sharing, by default, everyone who can access the FileCloud site can access the video file.

When you choose to allow selected users and groups, you must complete the following steps:

1. Add the user as a Guest.
2. Configure the access permissions for that specific user as described in Table 2.

Table 2. Guest permissions

Permission	Effect
View + Download	Users can browse existing files and download files.
View + Download + Share	Users can browse existing files, download files and share files with other users.
View + Share	Users can browse existing files, preview files (not download) and share files with other users.
View Only	Users can only browse existing files, and preview files (not download).
Share Only	Users cannot browse existing files, but only share files with other users.

To configure who can access the video file:

1. Open a browser.
2. Log on to the User Portal.
3. If the file is not yet being shared, click *My Files*, select the file, then click *Share*.
4. If the file is already being shared, click *Shared Files*, select the file, then click *Manage Share*.
5. On the *Manage Share for file* window, in *Share Permissions*, select *Allow Selected Users/Groups*.
6. To add a user, select the *Guest* tab, and then click *Add Guest*.
7. To add a group, click the *Group* tab, and then click *Add Group*.
8. On the *Search Users* window that opens, in the search box type in the account name or email address of the user you want to grant access.
9. On the *Email Notification* window that opens, review the email, make any necessary changes, and then click *Send*.
10. On the *Manage Share for file* window, in *Share Permissions*, select which permissions you want to grant: *Allow View*, *Allow Download*, *Allow Share*.
11. To save your changes, click *Update*.

# Managing Shares



After you create a share, you can always edit the settings when you want to change what is being shared and who has permissions to access it.

The Manage Share window contains buttons to perform the following actions:

Manage share for file - image.png 1 2 3 4 5 X

Share URL  






1. Copy URL to Clipboard
2. Open URL
3. Customize Share Link
4. List Activities on Share
5. Send Link via Email

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

## What do you want to do?

 View Share Information	<ul style="list-style-type: none"> <li> <a href="#">Viewing Existing Shares</a></li> <li> <a href="#">Viewing Expired Shares</a></li> <li> <a href="#">View Re-Share Activity</a></li> </ul>
 Update Share Settings	<ul style="list-style-type: none"> <li> <a href="#">Managing Shared Files and Folders</a></li> <li> <a href="#">File Change Notifications</a></li> </ul>
 Stop Sharing	<ul style="list-style-type: none"> <li> <a href="#">Leaving a Share</a></li> </ul>



# Filter Attributes

All Shares : This will list all shares

Private Shares : This will list private shares only

Public Shares : This will list public shares only

To reset the filter by, click on "All Shares"

## **Filter by Expiry**

All : This will list all the shares irrespective of the expiry

Expired : This will list expired shares only

Not Expired : This will list not expired shares only

To reset the filter by expiry, use "All"

# Managing Shared Files and Folders



After you create a new share, you can update who it is shared with and what permissions they have when they access the files and folders.

What do you want to do?

 Edit Share Settings	<ul style="list-style-type: none"><li>➔ <a href="#">Edit Share Permissions</a></li><li>➔ <a href="#">Edit Share URL</a></li></ul>
 Update Shares and Members	<ul style="list-style-type: none"><li>➔ <a href="#">View/Copy Share Link</a></li><li>➔ <a href="#">Email a Share Link</a></li></ul>
 Remove a Share	<ul style="list-style-type: none"><li>➔ <a href="#">Remove a Share</a></li></ul>

# Edit Share Permissions



When you create a share, you can use custom permissions.

A file or folder can be shared with:

- Anyone with access to the link (Public Share). *No FileCloud account required.*
- Anyone with access to the link (Public Share) and a password. *No FileCloud account required.*
- Another user in FileCloud (Private share). *FileCloud account required.* The shared files will show up in the "Shared with Me" folder.

In addition, it is possible to control the access to the shared resource with read, write, or share permissions.

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

To edit permissions for an existing FileCloud share:

1. Open a browser and log in to the [User Portal](#).
2. In the *User Portal*, click *My Files*.
3. Select the shared file you want to update, and then click *Manage Share*.
4. On the *Manage Share* dialog box, you can edit settings for shared files and folders.

💡 As of 19.2, **admins can change the ownership of shares**. This can be done through the *Manage Share* dialog box.

## Manage Share for file - sample.cee file.txt

To learn more about your options, use the following links:

 File Options		<a href="#">Publicly sharing a file</a>
		<a href="#">Privately sharing a file</a>

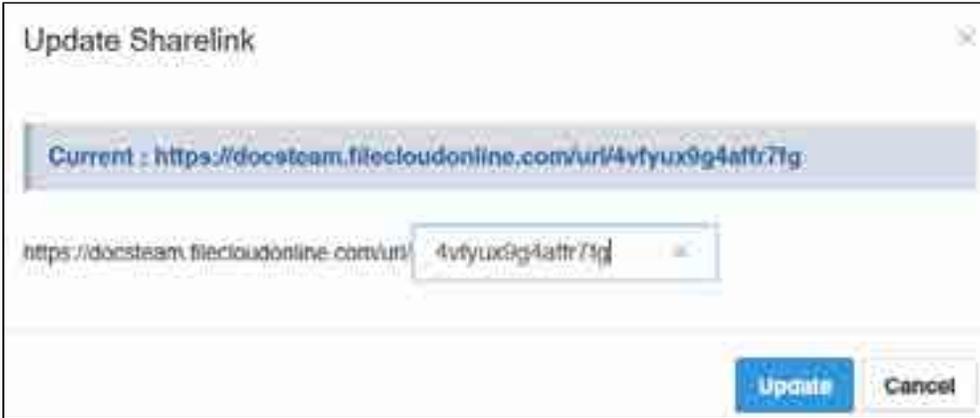


# Edit Share URL



Filecloud automatically generates a unique and difficult-to-guess short link to shared files and folders.

- You can edit the short link to be more recognizable.
- All share links must start with "url"
- Links that starts with "url" are by default read-only



To edit the URL used to access a shared file or folder:

1. Open a browser and log in to the User Portal.
2. In the *User Portal*, click *My Files*.
3. Select the shared file you want to update, and then click Manage Share.
4. On the *Manage Share* dialog box, at the top, click the *Customize share link* button .



5. Set a unique URL name.
6. Click *Update*.

# Email a Share Link



You can send an email to anyone with a copy of the link included so that the recipient can access your file or folder.



A FileCloud account will be created for the email address of the recipient. Typically, the FileCloud username will be an alias of the email (username "john" for email "john@example.com"). However, if the alias already exists in FileCloud, then the username will receive an incremented number depending on how common it is (username "john\_1" for email "john@ab.com").

What happens after the email is sent and the recipient clicks the link depends on how you have shared your file or folder.

Share	Share Type	Share Password Set	FileCloud User	What the Recipient Sees	For More Information
File	Public			 <p><i>Click on the link above to access your files.</i></p> <ol style="list-style-type: none"> <li>1. On the Login screen, the user must create a new account.</li> <li>2. The recipient must return to their email Inbox.</li> <li>3. The recipient must verify their FileCloud account.</li> <li>4. The recipient clicks on the link to the share in the email you sent.</li> <li>5. The recipient is shown a page with: <ul style="list-style-type: none"> <li>• A preview of the file in a PDF format</li> <li>• A button to download the file</li> <li>• A button to print the file</li> </ul> </li> </ol>	

File	Public			 Password: ctyvhl34  Click on the link above to access your files.  <ol style="list-style-type: none"> <li>1. On the Login screen, the user must create a new account.</li> <li>2. The recipient must return to their email Inbox.</li> <li>3. The recipient must verify their FileCloud account.</li> <li>4. The recipient clicks on the link to the share in the email you sent.</li> <li>5. The recipient must type in the password for the file they received with the share invite.</li> <li>6. The recipient is shown a page with: <ul style="list-style-type: none"> <li>• A preview of the file in a PDF format</li> <li>• A button to download the file</li> <li>• A button to print the file</li> </ul> </li> </ol>
File	Public			
File	Public			
File	Private			
File	Private			

  Remember that you cannot set the Enable Password field on a private share.

- Password protection is provided through the user's FileCloud account.
- You cannot set another password on a privately shared file or folder.

To send an email with a link to your shared file or folder:

1. Open a browser and log in to the User Portal.
2. In the *User Portal*, click *My Files*.
3. Select the shared file you want to update, and then click *Manage Share*.
4. On the *Manage Share* dialog box, at the top, click the *Send Link via Email* button ().



5. On the *Send Link via Email* window, in *To Email*, type in the email address of the person you want to share your file or folder with.

**Send Share Link via Email**

**Your Name:**  
me

**Your Email:**  
me@codefath.com

**To Email:**  
(Use comma(,) to separate multiple emails)

**Share Link:**  
https://docsteam.filecloudonline.com/url/4vfyux9g4affr7fg

**Message:**

**Send Email** **Close**

6. Type in a message - it cannot be left blank.
7. Edit any other fields as necessary.
8. Click *Send Email*.

# Remove a Share



If you need to stop sharing a file or folder, you can remove the shared access.

- This does not remove the file or folder
- Users with whom you previously shared the file or folder will be notified that it is no longer available

## To remove a share:

1. Open a browser and log in to the *User Portal*.
2. In the *User Portal*, click *My Files*.
3. Select the shared file you want to update, and then click *Manage Share*.
4. On the *Manage Share* window, at the bottom, click *Remove Share*.
5. On the confirmation screen, click *OK*.

# View and Copy Share Link



After you create a share, you can return to the Manage Share settings window to view and copy the shared link again.

The Manage Share window contains buttons to perform the following actions:

The screenshot shows a window titled "Manage share for file - image.png". Inside the window, there is a "Share URL" field containing the text "https://docsteam.filecloudonline.com/url/p3xphjuphb5f9uwd". To the right of the URL field are five numbered buttons (1-5) and a close button (X). Below the window, a list of actions is provided:

1. Copy URL to Clipboard
2. Open URL
3. Customize Share Link
4. List Activities on Share
5. Send Link via Email



The *Manage Share* screen's *Copy to Clipboard* button is available in FileCloud version 19.1 and later.

This allows users to quickly have the link available to them at the click of a mouse button.

To edit the URL used to access a shared file or folder:

1. Open a browser and log in to the *User Portal*.
2. In the *User Portal*, click *My Files*.
3. Select the shared file you want to access the URL for, and then click *Manage Share*.
4. The URL is shown at the top of the window and can be copied.
5. To edit the URL, on the *Manage Share* dialog box, at the top, click the *Customize share link* button ()

Send Share Link via Email



Your Name:

me

Your Email:

me@codelathe.com

To Email:

Use comma(,) to separate multiple emails

Share Link:

<https://docsteam.filecloudonline.com/url/4vfyux9g4affr7fg>

Message:

Send Email

Close

# Viewing Expired Shares

Click on "Shared Files" on the left menu to see a list of all shared files and folders. If a shared item has expired, it will be flagged as expired.



Note: Expired shares will also be flagged (with red share icon) in its source location.



# File Change Notifications

Users can automatically receive notifications through email when files are added, updated or deleted.

FileCloud administrators must enable file change notification emails to be sent whenever files have been changed. Additionally, Users can disable notification emails on a specific folder if they do not want to receive notification emails.

## How does File Change Notifications Work?

When multiple users have access to the same files and folders any change made by a user to the file or folder will trigger email notifications to all users that have access to that file or folder. In FileCloud, multiple users can have access to the same file or folder when:

- Files from network storage are shared with different users.
- Files from network storage are shared with different groups.
- Folders from managed storage or network storage has been shared with other users.
- Folders from managed storage or network storage has been shared with other groups.

It must be noted that the users will receive email notifications even when a subfolder within a shared folder has file changes.

All file change notifications are consolidated and emails are sent by FileCloud at regular notification frequency (15 minutes, 1 hour, 1 day etc) as set by your FileCloud administrator.

In order to have more control over e-mail notifications, **self change notifications are not sent** and **only the last 25 changes are notified** to the other share users.

Notifications are supported for the following actions:

- Add File
- Delete File
- Download File
- Preview File
- Lock File
- Unlock File

## Disable File Change Email Notifications for existing shares

File Change Notifications all enabled by default for all users and all folders. However, email notifications can be disabled by both administrator and user.

## Administrators:

Administrators have much more control in enabling and disabling notifications. More details are [here](#)

## Users:

Users can selectively disable notification for a specific folder and its sub-folders through the FileCloud User Interface.



## Disable File Change Notifications when creating a new share

Additionally, when a share is created, FileChange Notifications can be enabled or disabled for the share. Once disabled, users having access to that share will not receive any file change notifications related to that share.

Manage Share for file - test scenarios.docx

Share URI: [file://10.10.10.10/management/test-scenarios.docx](#) [?] [i] [x]

**Share Options**

Shared File/Folder:

Share Name:

Expires (Optional):  Never Expires  Expires

Restrict Downloads (Optional):  No Restrictions  Restrict to:

**Email File Change Notifications**:  YES  NO

Enable Password Protection:  YES  NO

**Share Permissions**

Allow Everyone  Allow Selected Users/Groups

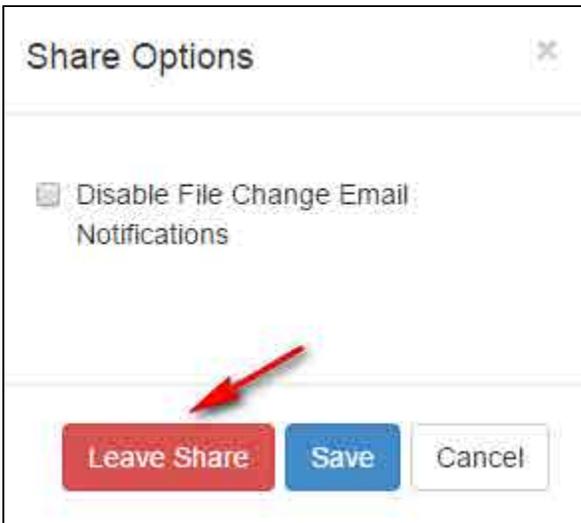
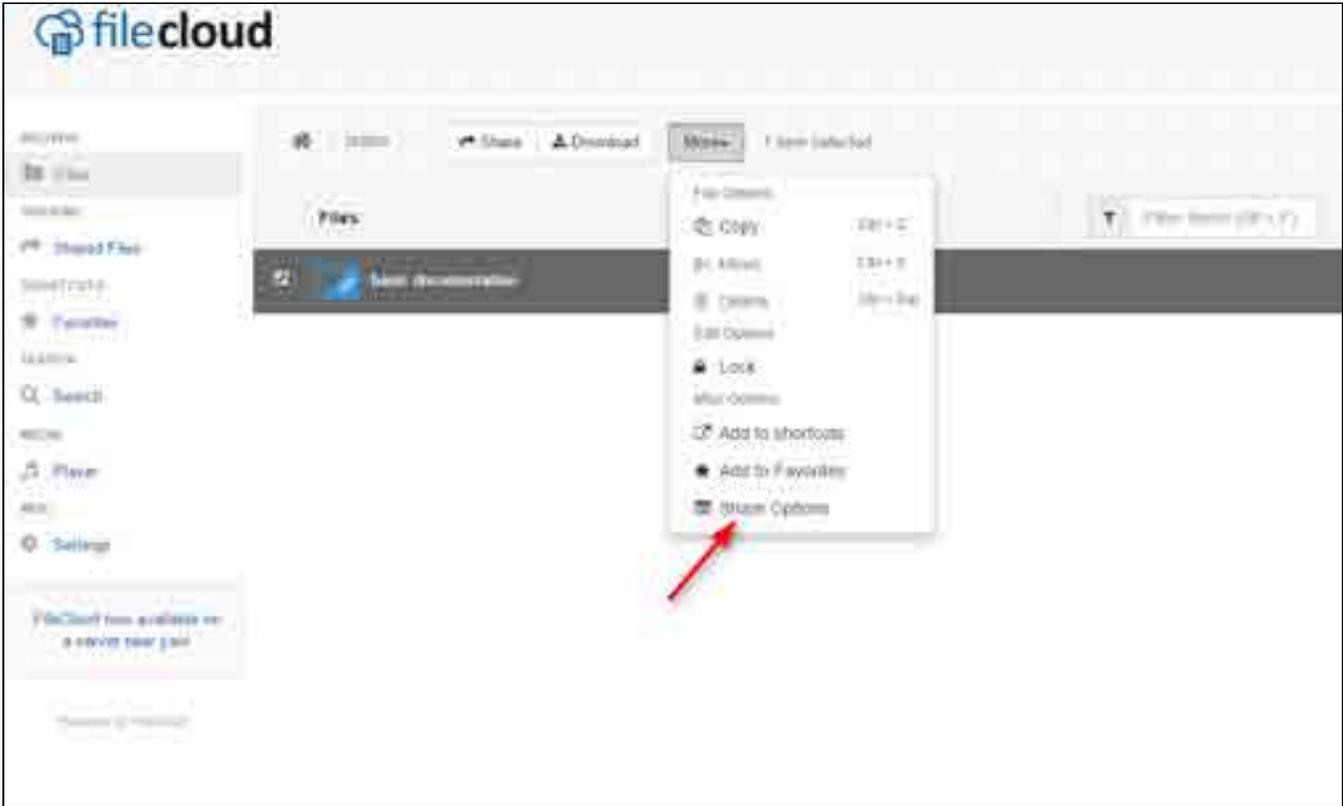
Guest:  Group:

Guest	Allow View	Allow Download	Allow Share
Share permitted for all. No guest selection necessary.			

# Leaving a Share

In some cases, you might not longer want to access the shared files from another user.

You can remove yourself from the share by selecting the top level share folder, pulling up the Share Options Dialog and selecting "Leave Share".



# View Re-Share Activity

 The ability to create a private file/folder share and see whenever that file/folder is shared again by Guests in the share is available in FileCloud version 18.2



Once you share a file or folder privately, it has the ability to be shared again by members.



If you leave the default settings when creating a private share, the file or folder cannot be shared again by the Guests (or members) that you add.

- This prevents share members from sharing your file/folder with others users that you didn't originally grant access to.



When creating a private share, if you choose the option to *Allow Share*, the file/folder can be shared again by the Guests (or members) of the share.

- This option can be helpful when you want another user to view and manage your shares.
- When you select a Guest and check the Allow Share checkbox, this assigns the user to be a share manager.
- A share manager now has the same permissions on the share as you, the share owner.
- The share manager can remove the sharing, move the file, and delete the file.
- If you allow sharing, Filecloud will notify you by logging it in the *Activities* panel on the right side of the user dashboard.



## Viewing Share Activity

To view all re-shares of the a file:

1. Open a browser and log in to the User Portal.
2. In the *User Portal*, click *My Files*.
3. Select the shared file you want to manage.
4. On the right side of the dashboard, in the *Details* panel, to see all notifications about this file, select the *Activities* tab.
5. To see Share Activity only, after selecting the file, click the *Manage Share* button.
6. In the top right corner of the *Manage Share* dialog box, click the *Share*

*Activity* button 



Details

**Activity**

Metadata

Last Week

 Sub1



**You** publicly shared this folder  
at 10:08 PM on Oct 04 2018, via [Web browser](#) From 34.197.99.39

 Sub1



**You** publicly shared this folder  
at 10:08 PM on Oct 04 2018, via [Web browser](#) From 34.197.99.39

 Sub1



**You** publicly shared this folder  
at 10:08 PM on Oct 04 2018, via [Web browser](#) From 34.197.99.39

 DICOM\_Video.mp4

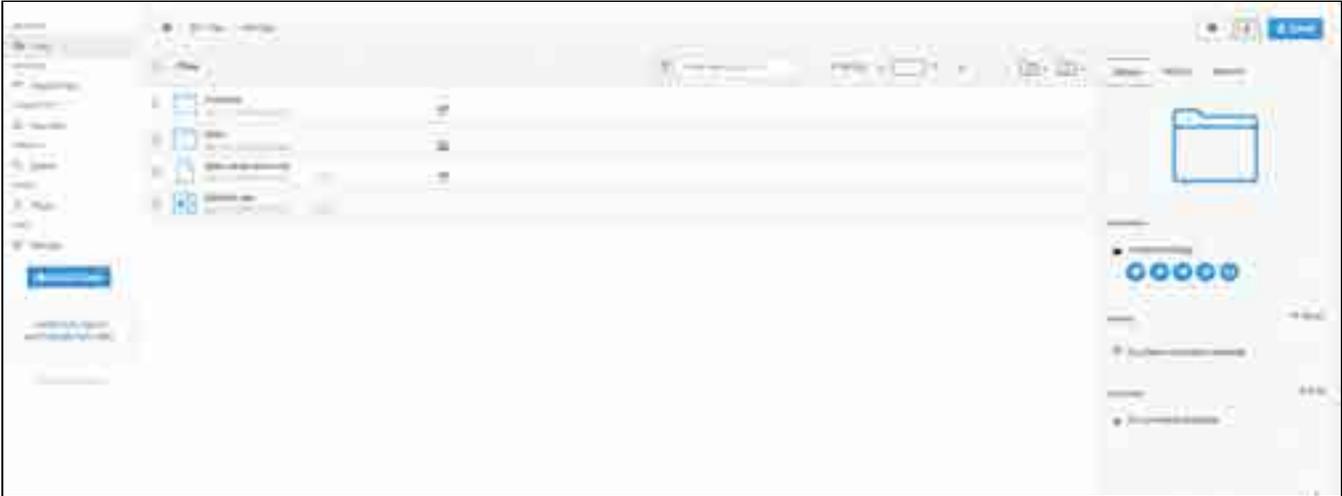


**You** publicly shared this file  
at 10:08 PM on Oct 04 2018, via [Web browser](#) From 34.197.99.39

# Deleting a share

To delete a share file, click on the shared file or folder and select manage share and click on "remove share" button. This can also be done from the Shares section.

Removing Shares from the "Files" View



Removing Shares from the "Shared Files" view



# Share Analytics

Share analytics gives insights on latest activities on a share. Share activity gives detailed information on Who did what action, when, how and from what location on the file or folder that was shared.

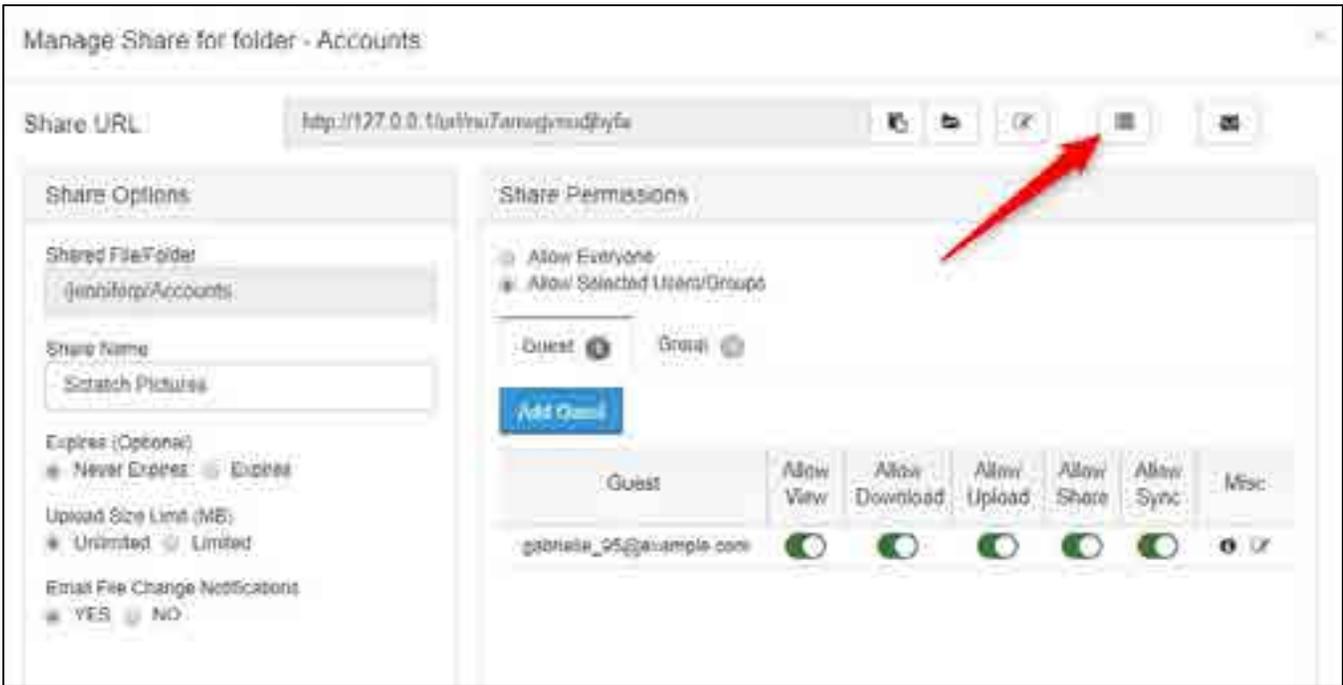
Share activity can be accessed from the Share List Screen and Share Detail Screen of the FileCloud User Interface.

From the User Interface, click the Shared Files (on left menu) to display the screen shown below. On selecting an individual share the activity can be accessed as shown below.

The share list also displays the Last Access Date of the share and the total number of activities in the last 30 days.



From the share detail screen on the User Interface, the share activity button is displayed as shown below.



Share Analytics records information of the following actions on a Shared Item: Add File, Add Folder, Delete File, Delete Folder, Download File, Create Share.

## Share Activity



gemstone.jpg

**JP** Jen Perkins downloaded gemstone.jpg from 127.0.0.1  
My Files/Accounts  
20 hours ago, via Cloud Sync

Accounts

**JP** Jen Perkins downloaded Accounts from 127.0.0.1  
My Files/Accounts  
2 days ago, via Web browser

Scientific.pdf

**JP** Jen Perkins deleted Scientific.pdf from 127.0.0.1  
My Files/Accounts  
2 days ago, via Web browser

Scientific.pdf

**JP** Jen Perkins downloaded Scientific.pdf from 127.0.0.1  
My Files/Accounts  
2 days ago, via Cloud Sync

Scientific.pdf

**JP** Jen Perkins added Scientific.pdf from 127.0.0.1  
My Files/Accounts  
2 days ago, via Web browser

# Troubleshooting File Issues



FileCloud's User Portal allows you to access all the files in your FileCloud server.

If you encounter problems, use the following guide to help resolve your issue.

## FAQ

Some of the Frequently Asked Questions (FAQ) about FileCloud's User Portal have been compiled below.

💡 Click on a link to expand it.

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

Folder and file names cannot contain:

- ..
- \
- /
- :
- \*
- ?
- "
- <
- >
- |

# Notifications

You can receive notifications about files or folders stored in all types of folders. Your administrator sets your default notification settings which determine whether notifications are sent to you when:

- a file or folder is shared with you
- one of the following actions is performed (by you or another user) on a file or folder you have access to:
  - a file or folder is uploaded
  - a file or folder is downloaded
  - a file or folder is shared
  - a file or folder is deleted
  - a file or folder is renamed
  - a file is updated
  - a file is previewed in the browser or one of the mobile apps
  - a file or folder is locked

If you are permitted to to override your administrator's default settings, you can specify which actions you are notified about.

There are several ways you can specify your own notification settings.

- [Customize notifications in user settings](#)
- [Notifications from the details panel](#)
- [Set notifications for Files and Folders](#)

# Customize notifications in user settings

If you are permitted to to override your administrator's default settings, you can specify which actions you are notified about.

On this page:

- [Customize your notifications settings](#)
- [Edit path notifications rules](#)
- [Disable custom notifications without removing custom settings:](#)
- [Return to the default notification settings](#)

## Customize your notifications settings

1. Click **Settings** in the navigation bar, and click the **Notifications** tab.



2. By default, **Use default notification settings** is selected. If you are permitted to override default settings, **Use my own notification settings** and all of the options under it can be edited. If you are not permitted to override default settings, **Use my own notification settings** and the options under it cannot be edited.
3. Select **Use my own notification settings**.
4. To turn off notifications, uncheck **Send Notifications**; otherwise, leave it checked.
5. By default, **When to send** is set to **Daily**. If you want to receive notifications less frequently, choose **Daily**, **Weekly**, or **Custom** in the drop-down list. You will receive an email listing all new notifications since the last notification email. If you choose **Custom**, a text box opens for you to enter the notification interval in minutes. You are not allowed to enter a value that is less than the notification interval set by your admin.
6. **Send Notifications on** indicates which actions you will receive notifications about. All actions are unchecked by default. Check any actions that you want to receive notifications about.
7. Check **Self Notifications** if you want to receive notifications about changes you make to your own files or folders.



If you do not check **Self Notifications**, you only receive notifications when a user you have shared a file with performs an action on that file.

If you do check **Self Notifications**, you also receive a notification when you perform an action on a file you own or a file that has been shared with you.

## Edit path notifications rules

At the bottom of the page is a **Path Notifications Rules** table listing the full paths of any files or folders you have configured with notification rules. For information about configuring paths of files or folder with notification rules, see [Set notifications for files and folders](#).

Path	Actions
\\SHARED\jantfer\users.csv	<input type="checkbox"/> <input checked="" type="checkbox"/>
\\win-3ae1bigger-gnd.png	<input type="checkbox"/> <input checked="" type="checkbox"/>

1. To edit the rule, under **Actions**, click the edit button.  
A dialog box identical to the upper portion of the **Global Notifications Settings** (the current screen) opens for the file or folder listed under **Path**. Change any of the settings and click **Save**.
2. To delete the rule, under **Actions**, click the delete button.  
Note that settings on paths override the custom notification settings that appear above them.

### **Disable custom notifications without removing custom settings:**

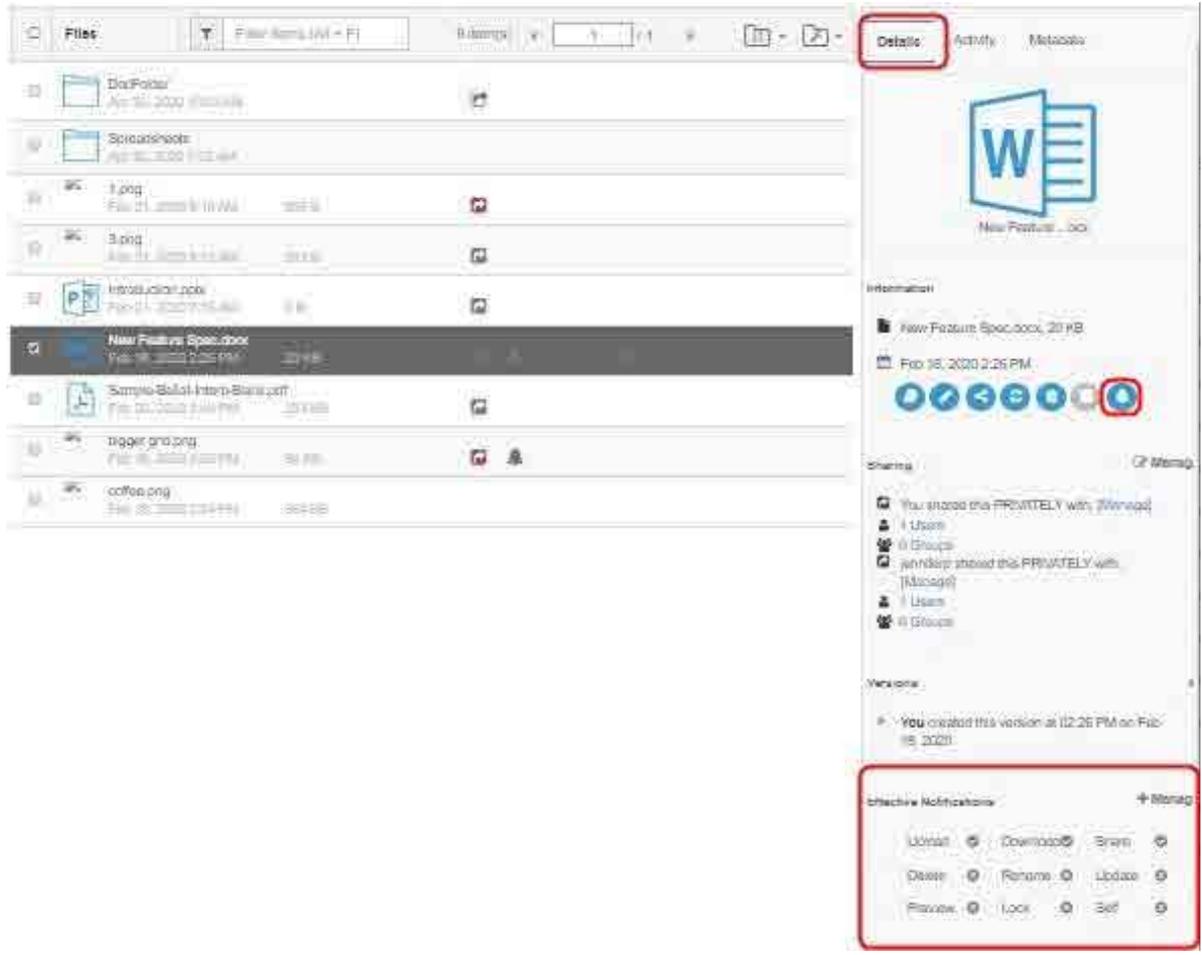
1. Click **Settings** in the navigation bar, and click the **Notifications** tab.
2. Uncheck **Send Notifications**.
3. Click **Save**.

### **Return to the default notification settings**

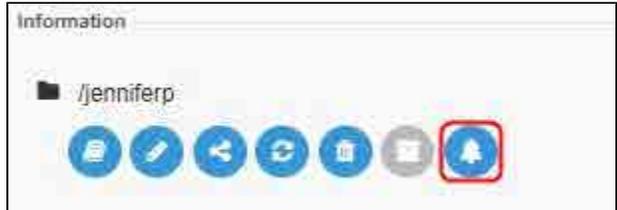
1. Click **Settings** in the navigation bar, and click the **Notifications** tab.
2. Select **Use default notification settings (as configured by Admin)**.
3. Click **Save**.  
Your previous settings including your path settings are not saved. If you want to use them again, you must reset them manually.

# Notifications from the details panel

When you select a file or folder, the right panel displays information about it in separate tabs. In the **Details** tab, under Information, a notifications (bell-shaped) icon informs you if notifications are enabled. Under **Effective Notifications**, you can view and edit the types of notifications available for the selected file or folder



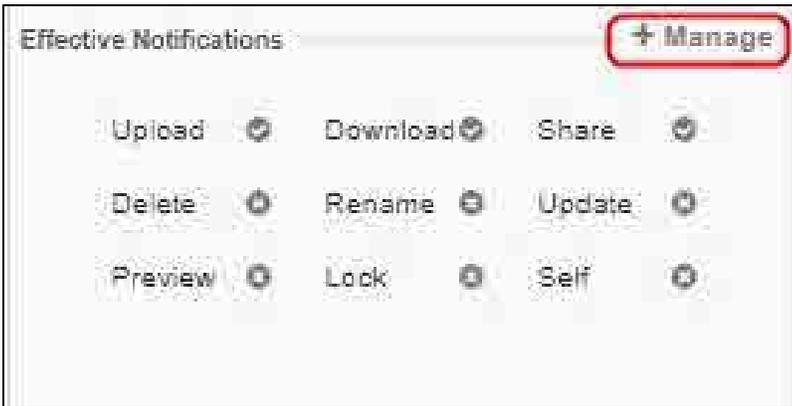
The notifications icon is blue if one or more notifications are enabled:



The notifications icon is gray if all notifications are disabled:



Enabled notifications are followed by a check, and disabled notifications are followed by an x.

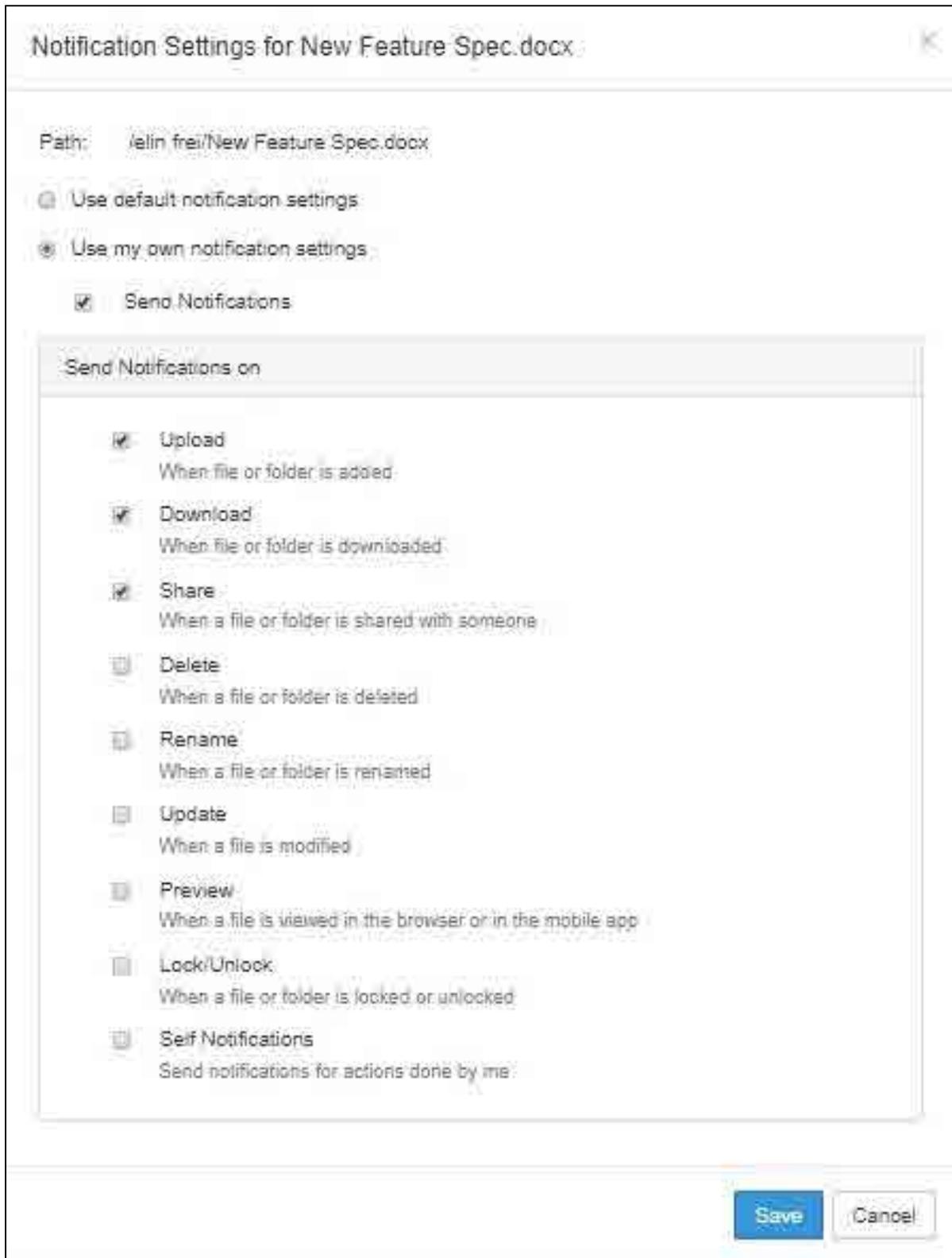


A note is displayed if all notifications are enabled or disabled:



## Customize your notifications from the Effective Notifications box

To open the **Notifications Settings for <file/folder>** dialog box, in the **Effective Notifications** box, click **Manage**:



To configure your own notification settings:

1. By default, **Use default notification settings** is selected. If you are permitted to override default settings, **Use my own notification settings** and all of the options under it can be edited. If you are not permitted to override default settings, **Use my own notification settings** and the options under it cannot be edited.
2. Select **Use my own notification settings**.
3. To turn off notifications, uncheck **Send Notifications**; otherwise, leave it checked.

4. **Send Notifications on** indicates which actions you will receive notifications about.  
Check any actions that you want to receive notifications about.
5. Check **Self Notifications** if you want to receive notifications about changes you make to your own files or folders.



If you do not check **Self Notifications**, you only receive notifications when a user you have shared a file with performs an action on that file.

If you do check **Self Notifications**, you also receive a notification when you perform an action on a file you own or a file that has been shared with you.

To disable custom notifications without removing custom settings, uncheck **Send Notifications**.

To return to the default notification settings, select **Use default notification settings**. If you want to return to your custom settings, you must reset them manually.

# Set notifications for Files and Folders

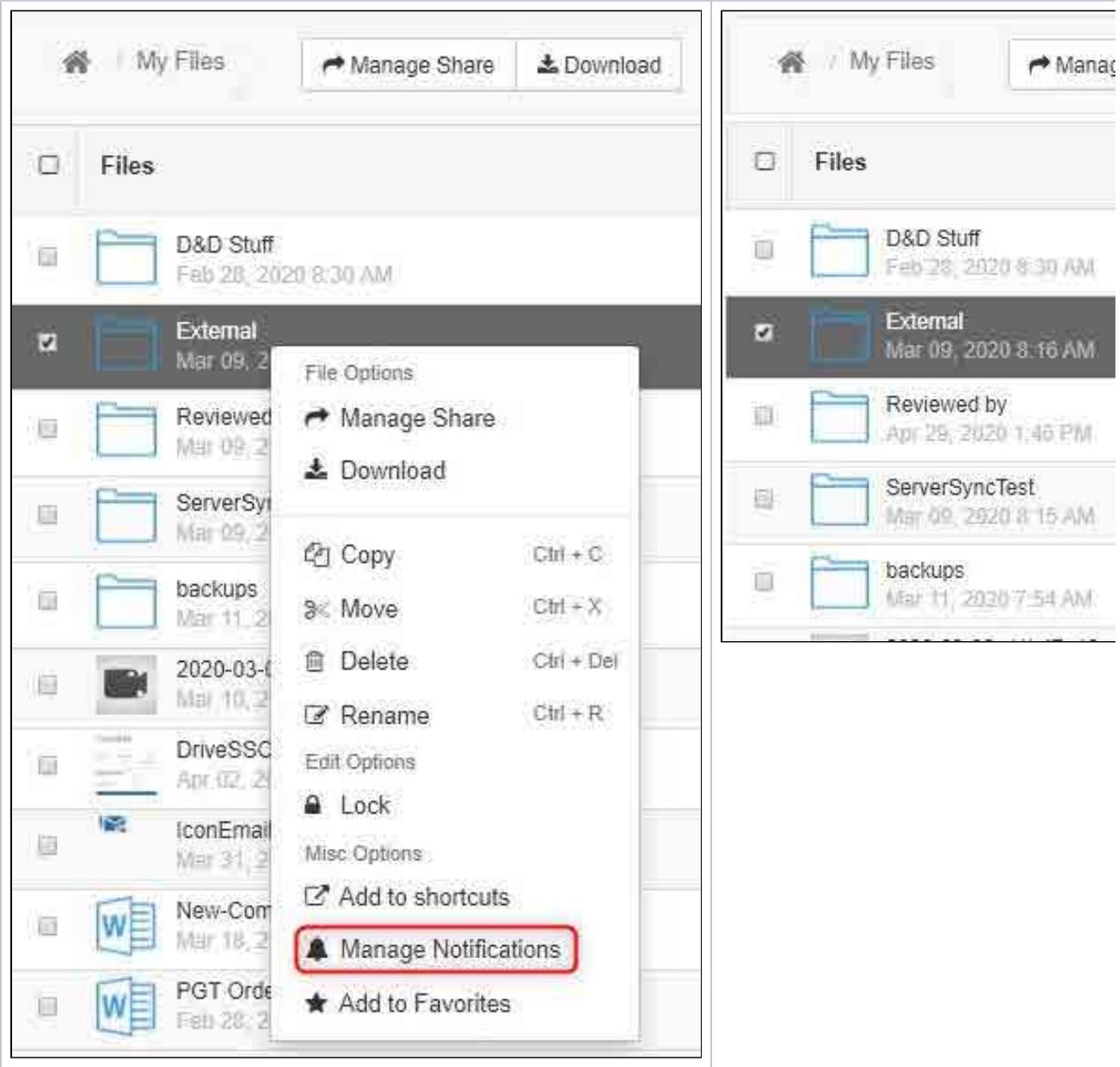
If you are permitted to to override your administrator's default settings, you can specify which actions you are notified about for specific files and folders. The notifications tell you when other users that have access to the file or folder (either because they own it or you or another user has shared it with them) perform an action on it. You can also notify yourself when you perform an action on the file or folder.

On this page:

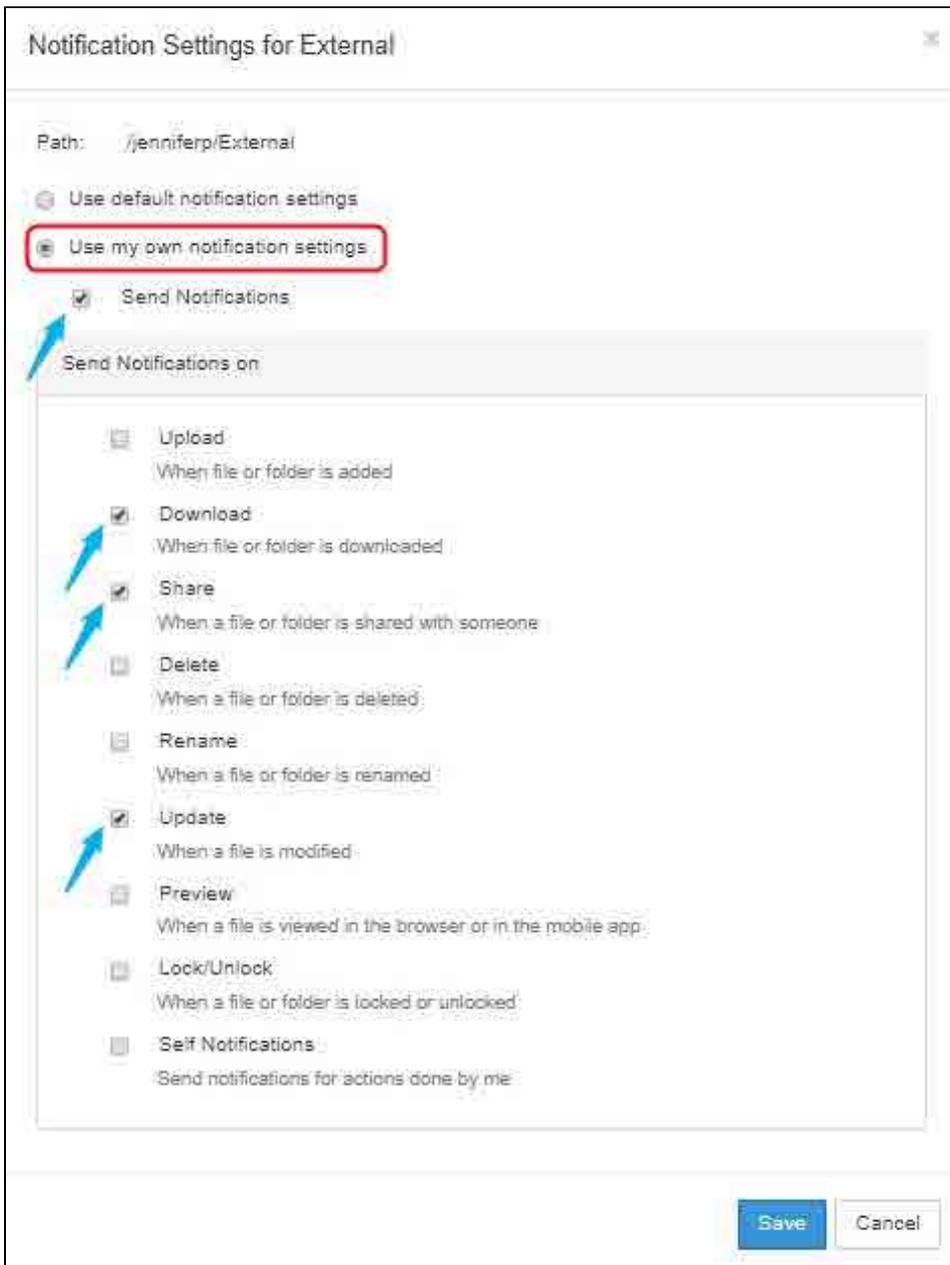
- [Customize notifications for a file or folder:](#)
- [Disable custom notifications for a file or folder without removing custom settings:](#)
- [Return to the default notification settings](#)
- [Priority of Notification Settings](#)

## Customize notifications for a file or folder:

1. In the user interface, navigate to the file or folder.
2. Select the file or folder and either right-click it or click **More** in the toolbar:



3. To open a **Notification Settings** dialog box, choose **Manage Notifications**. The first time you open the dialog box for a file or folder, nothing is checked or selected. If you are permitted to override default settings, **Use my own notification settings** and all of the options under it can be edited. If you are not permitted to override default settings, **Use my own notification settings** and the options under it cannot be edited.



4. To customize your notification settings, check **Use my own notification settings**.
  - a. To receive any notifications, check **Send Notifications**.
  - b. Check the box next to each type of notification that you want to receive.
5. To receive notifications of your own actions, check the last checkbox, **Self Notifications**.

**i** If you do not check **Self Notifications**, you only receive notifications when a user you have shared a file with performs an action on that file.

If you do check **Self Notifications**, you also receive a notification when you perform an action on a file you own or a file that has been shared with you

6. Click **Save**.  
When you go to Settings > Notifications, the file or folder path is listed under **Path Notification Rules**.

### Disable custom notifications for a file or folder without removing custom settings:

1. In the user interface, navigate to the file or folder.
2. Select the file or folder and right-click it.
3. Choose **Manage Notifications**.
4. Uncheck **Send Notifications**.
5. Click **Save**.

## Return to the default notification settings

1. In the user interface, navigate to the file or folder.
  2. Select the file or folder and right-click it.
  3. Choose **Manage Notifications**.
  4. Select **Use default notification settings**.
  5. Click **Save**.
- If you want to return to your custom settings, you must reset them manually.

## Priority of Notification Settings

The notification settings which take top priority are those you set on the specific file or folder that you are working on. The order of priority for notifications from top to bottom is:

1. The specific file or folder you are working on.
2. Its parent folder.
3. Each higher level of parent folder.
4. Your user settings.
5. Your policy settings.
6. Your administrator's global settings.