FileCloud Online

Version 23.263

FileCloud Client Applications and Add-ins

13 October, 2026

Table of Contents

Comparison of FileCloud Desktop, Sync, and Drive 2
Using FileCloud for Office 3
FileCloud Desktop for Windows 6
Opening and Logging in to FileCloud Desktop in Windows 10
Installing or Upgrading FileCloud Desktop for Windows 20
Working from the FileCloud Desktop for Windows Taskbar Icon 24
Using the Dashboard in FileCloud Desktop for Windows 25
Make Files and Folders Available Offline in FileCloud Desktop for Windows 38
Remove Files and Folders from Offline Folders for FileCloud Desktop for Windows 43
Working with Offline Files from FileCloud Desktop for Windows 47
Working with Online Files in FileCloud Desktop for Windows 50
Sharing Files and Folders in FileCloud Desktop for Windows 53
How FileCloud Desktop for Windows handles change conflicts 55
Mass Deployment Configuration for FileCloud Desktop for Windows 59
Using FileCloud for Office with FileCloud Desktop for Windows 62
Sending Feedback from FileCloud Desktop for Windows 83
White Labeling in FileCloud Desktop for Windows 88
Set up Automatic SSO Authentication for ADFS Windows Users 93
Known Folder Redirection and FileCloud Desktop 94
Accessing Crash Reports in FileCloud Desktop for Windows 95
Automatic Locking in FileCloud Desktop for Windows 96
FileCloud Desktop for macOS 98
Installing and Upgrading FileCloud Desktop for macOS 100
Opening and Logging in to FileCloud Desktop in macOS 105
Working from the FileCloud Desktop for macOS Menu Bar Icon 115
Using the Dashboard in FileCloud Desktop for macOS 116
Make Files and Folders Available Offline 127
Remove Files from Offline Folders 131
Working with Offline Files from FileCloud Desktop for macOS 136

Working with Online Files in FileCloud Desktop for macOS 139
Sharing Files and Folders in FileCloud Desktop for macOS 141
How FileCloud Desktop for macOS handles change conflicts 143
Mass Deployment Configuration for FileCloud Desktop for macOS 147
Using FileCloud for Office with FileCloud Desktop for macOS 151
Sending Feedback from FileCloud Desktop for macOS 172
White Labeling in FileCloud Desktop for macOS 177
FileCloud Sync 182
Install and Log In to FileCloud Sync 182
Opening and Using Sync Dashboards 199
Sync Settings 211
Synchronizing Files 223
Cloud Storage: Selective Folder Sync 242
Advanced Offline Sync mode 246
Backing Up Files 249
Managing Files in File Explorer 261
Searching in Sync 292
Refreshing Sync 306
View or Clear Log Messages in Sync 308
Updating a Changed Password in Sync 309
Using FileCloud for Office with Sync 310
Sync Troubleshooting Guide 330
FileCloud Drive 341
What is FileCloud Drive? 341
Understanding FileCloud Drive 343
Installing FileCloud Drive 347
Start and Log In to Drive 351
Exit or Log Out of Drive 365
Settings 366
Automatic Locking in FileCloud Drive 371
Working in FileCloud Drive 371
Using FileCloud Drive in a Remote Desktop Service Environment. 427

Troubleshooting Drive 432
How to uninstall FileCloud Drive 441
FileCloud Drive for Mac 442
About FileCloud Drive for Mac 442
FileCloud Drive for Mac Menu Options 444
How Can I Increase File Size Limits for FileCloud Drive for Mac? 446
How to Fix Problems Uploading Large Files 447
Proxy Server for FileCloud Drive for Mac 448
Enable Right-Click Support in Drive for Mac 449
Viewing a Crash Report for Drive for Mac 450
FileCloud Drive: Configuration for Big Sur 11.3 or later versions Running on Apple Silicon 452
How to uninstall FileCloud Drive for Mac 456
Enabling Thumbnail Previews in Drive for Mac 456
MacDrive file issues 457
FileCloud for Outlook Add-In 460
Logging in to FileCloud for Outlook 460
Opening FileCloud for Outlook from an email 462
Attaching files and folders from FileCloud to an Outlook email 463
Uploading an Outlook attachment to FileCloud 474
Viewing the FileCloud for Outlook version and build 483
Troubleshooting 484
Installing the Outlook Add-In 484
Install and Run the SSO Auth Agent 489
Using FileCloud for Outlook with an On-Premises Exchange Server 494
Integration With Office 497
Install the FileCloud Office Add-In 497
Configure Sync for Edit in Desktop 500
Access Files Using Mobile Apps 503
Managing FileCloud Client Apps with MDM Software 504

This section includes the following help topics:

Comparison of FileCloud Desktop, Sync, and Drive

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

- FileCloud Desktop (for macOS or for Windows)
- FileCloud Sync
- FileCloud Drive

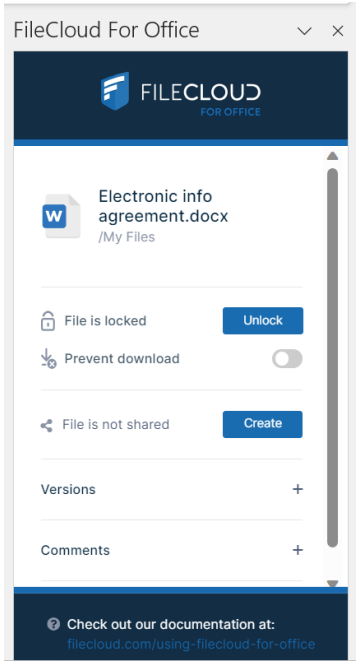
FileCloud Desktop combines the functions of Drive and Sync.

Use the information in the table below to understand the difference in the tools.

	FileCloud Desktop (FCD)	FileCloud Drive	FileCloud Sync
Offline File Access	✓	✗	✓
Endpoint Backup	✗	✗	✓
Access to Non-Synced Files	✓	✓	✗
Selective Sync	✓	✗	✓
File Sharing	✓	✓	✓
View/Edit File Properties, Versions, & Metadata	✗	✓	✓
File Locking	✓	✓	✓
Bandwidth Control	✗	✗	✓
Active Sync Hours	✗	✗	✓
Conflict Resolution	✓	✗	✓
Network Folder Support	✓	✓	✓
OS Support	Windows macOS	Windows	Linux Windows macOS

Using FileCloud for Office

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

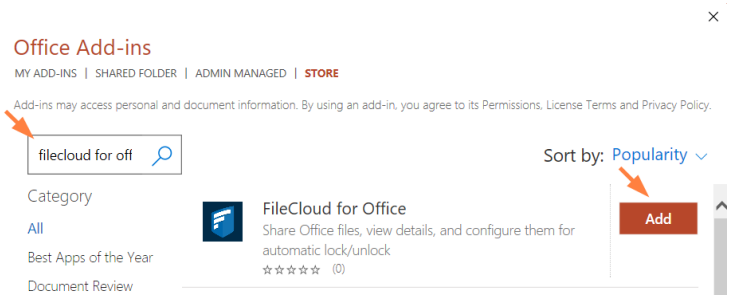


How do I install FileCloud for Office?

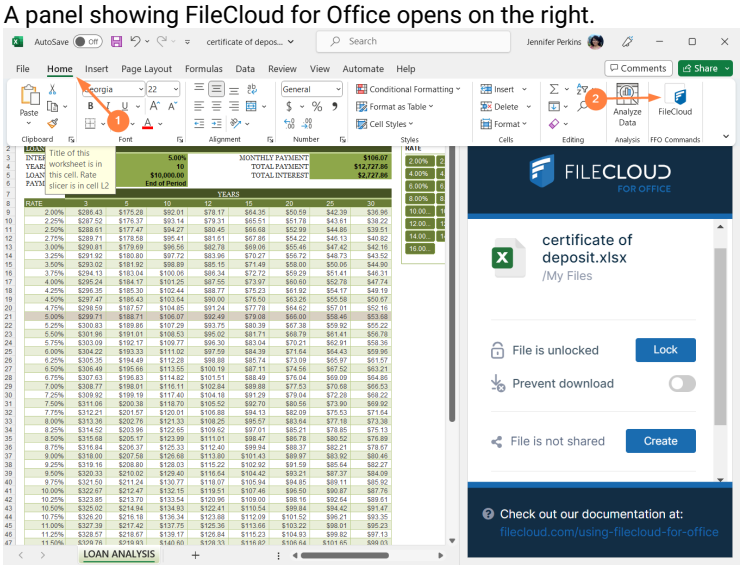
Before installing:
Contact FileCloud Support and request that your cookie same-site value be set to **None**.

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

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



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



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

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

What applications does FileCloud for Office works with?

- Word
- Excel

	• PowerPoint **What does FileCloud for Office do?** FileCloud for Office works with Office documents to enable you to: • automatically lock and unlock files when they are opened and closed • share files • access different versions of files

For more information, click the link to the individual client section for FileCloud for Office:
Using FileCloud for Office with FileCloud Desktop for macOS

Using FileCloud for Office with FileCloud Desktop for Windows

Using FileCloud for Office with Sync

Using FileCloud for Office with Drive

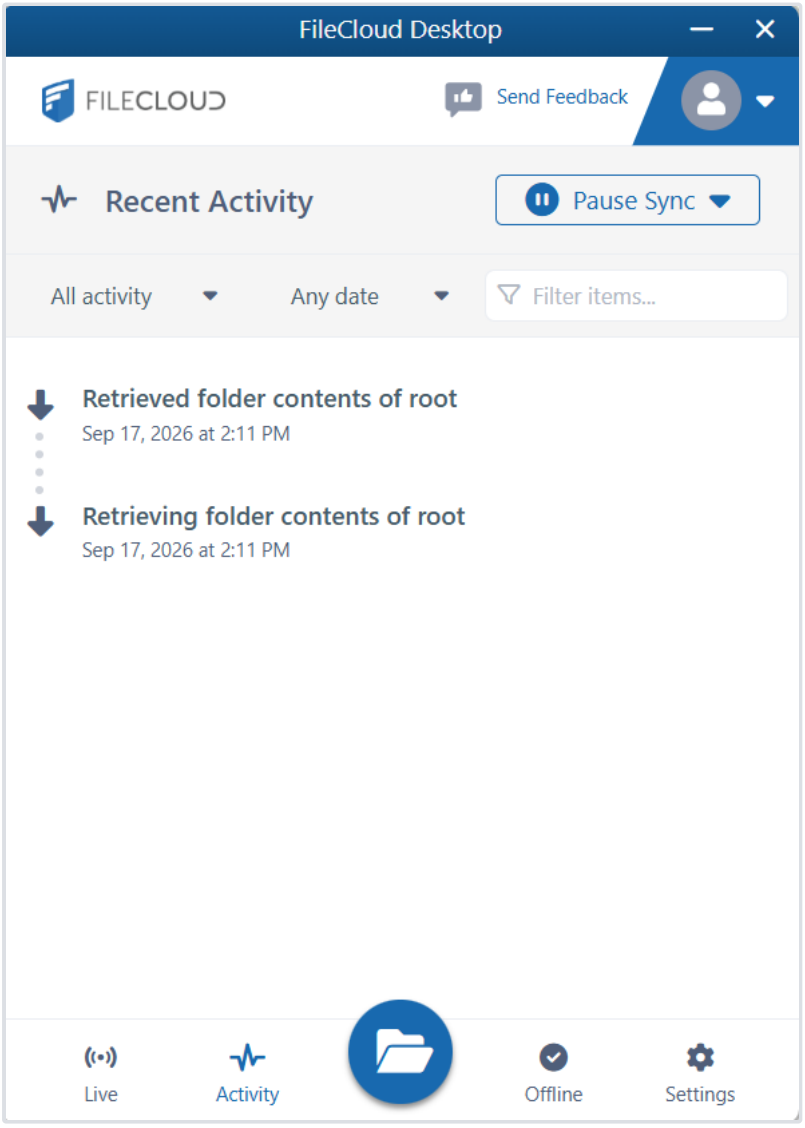
FileCloud Desktop for Windows

Beginning in FileCloud Desktop for Windows 23.253.1, a lock icon appears beside locked files in Windows Explorer.

To automatically clear space used by FileCloud for Desktop to store temporary files, we recommend turning on Storage Sense in Windows. For more information, see Manage drive space with Storage Sense.

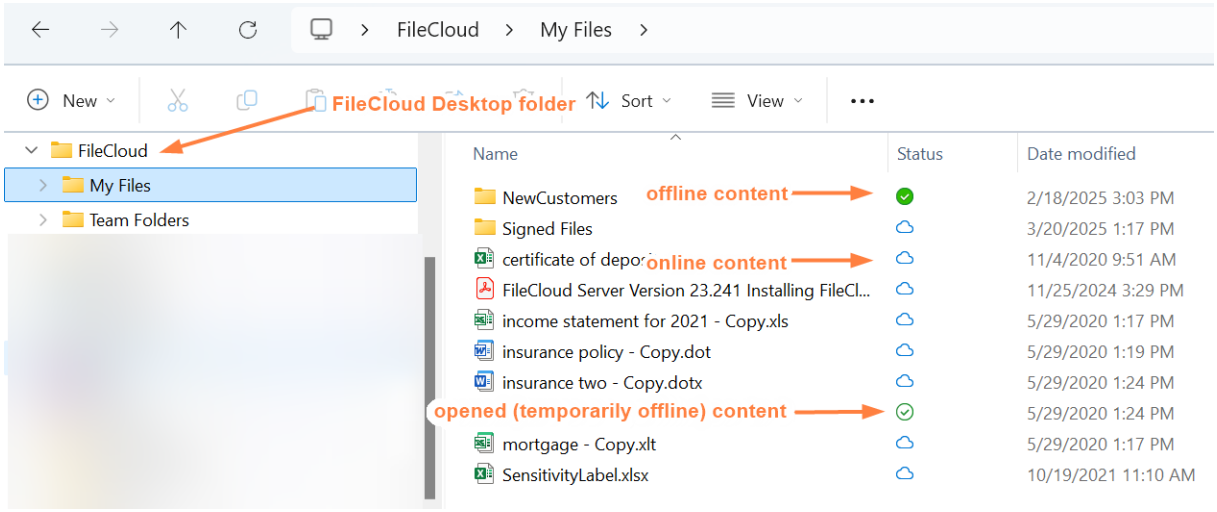
FileCloud Desktop for Windows enables you to access your FileCloud files and folders in Windows file explorer, where you can work with them online or make them available offline. Changes you make to offline files stored in FileCloud are immediately synced to the copies in FileCloud.

FileCloud Desktop for Windows opens as a dashboard that shows you live and recent actions and the folders you have downloaded offline, and also gives you access to user settings:

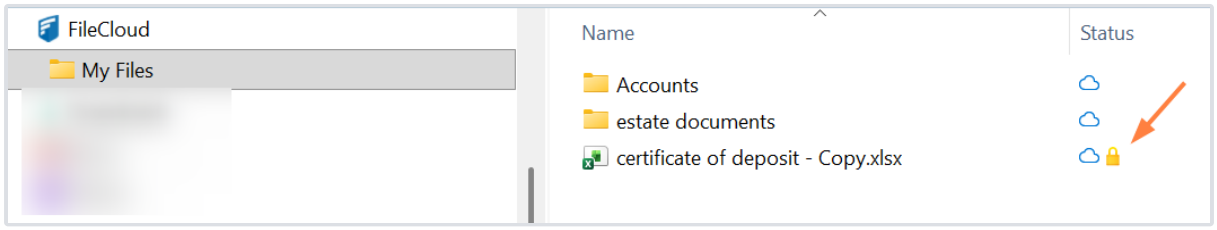


When you open FileCloud Desktop, its **FileCloud** folder becomes available in your Windows explorer. From there, you can work with your files online, or download them and work with them offline. Your online files and folders appear with cloud icons beside them. When you work with them, you are working with the copies in FileCloud, and if you view your user portal, you can see the modifications there. Your folders downloaded from FileCloud Desktop as offline folders and their files are marked with green icons with white check marks. When you work with them, you are working with downloaded copies of the files in FileCloud offline folders, and if you go offline, your changes are not synchronized to FileCloud until you go back online.

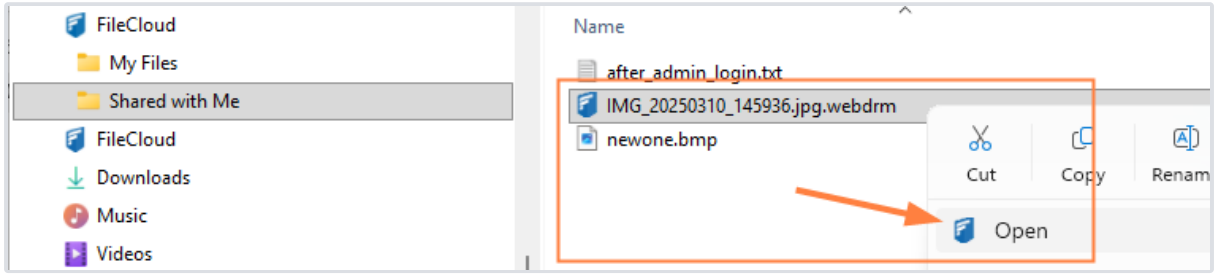
When a file in Window Explorer's FileCloud folder is opened, the file is temporarily downloaded, but not into FileCloud Desktop's offline folders, and it is not synced with FileCloud when you go online. The temporarily downloaded files are marked with a white icon with a green check mark.



A lock icon appears in the status of files that have been locked:



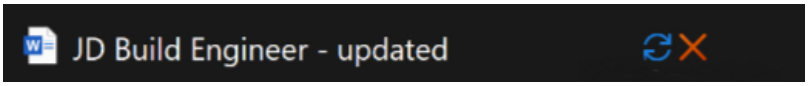
Files shared with the Secure Web Viewer requirement can be viewed through the Secure Web Viewer from FileCloud Desktop. The files appear in the FileCloud root under Shared with Me with a .webdrm extension as they would in the web browser. Click **Open** to view a .webdrm file through the Secure Web Viewer.



Sync Status
If a file or folder is currently being synced with FileCloud, a double arrow icon appears in the Status column:



If a file or folder is waiting to be synced with FileCloud, a double arrow icon with an x icon next to it appears in the Status column:



If a file or folder is only available online, and therefore cannot be synced, a cloud icon with a not available offline icon appears in the Status column:

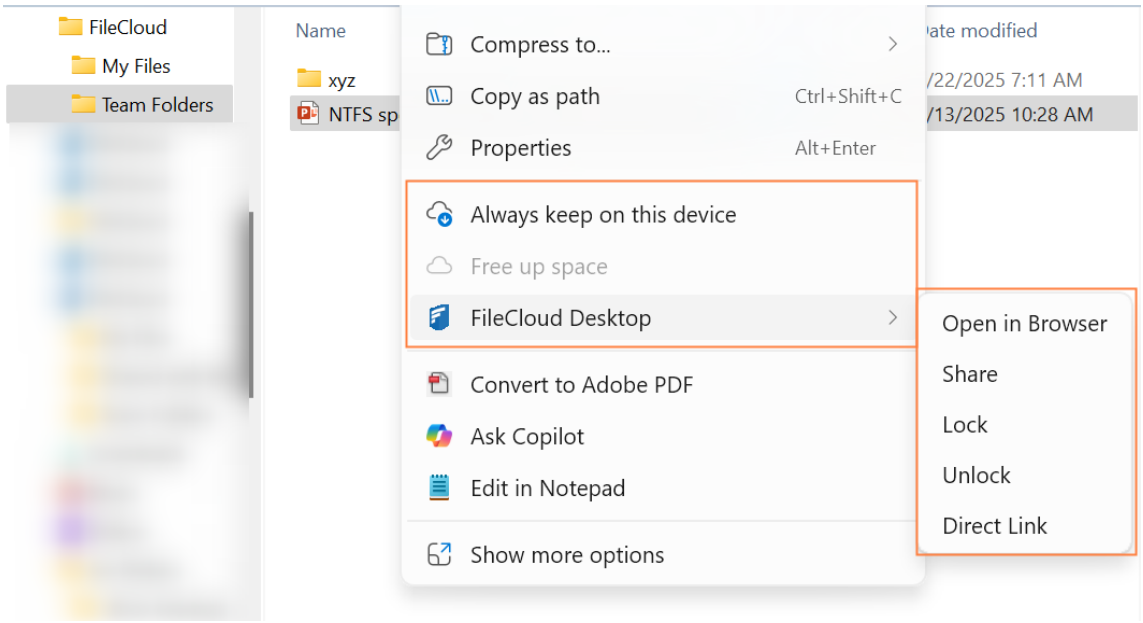


When you right-click on a file or folder in the FileCloud Desktop folder, the options **Always keep on this device**, **Free up space**, and **FileCloud Desktop** appear in the context menu. These options enable you to make files and folders available offline, remove downloaded copies to free up space, and to perform FileCloud Desktop tasks.
FileCloud Desktop tasks include:

- **Open in Browser** - Open the file or folder in the FileCloud user portal
- **Share** - Share the file or folder. See Sharing Files and Folders for help.
- **Lock** - Lock the file so other users cannot edit it.
- **Unlock** - Unlock a file you have locked so other users can edit it.
- **Direct Link** - Copy the share link so that you can paste it into a message or email to send to users. Only available for items in Team Folders, Shared with Me, and Network Folders.

Notes:

- You may have to right-click directly on the file or folder name to view these options.
- On Windows Server 2019 right-click options are not supported.



FileCloud Desktop automatically installs with FileCloud for Office (FFO), which enables you to automatically lock and unlock Office files and share them when you open them from the FileCloud Desktop directory.

Begin by installing FileCloud Desktop, and then try out its various functions.

Opening and Logging in to FileCloud Desktop in Windows

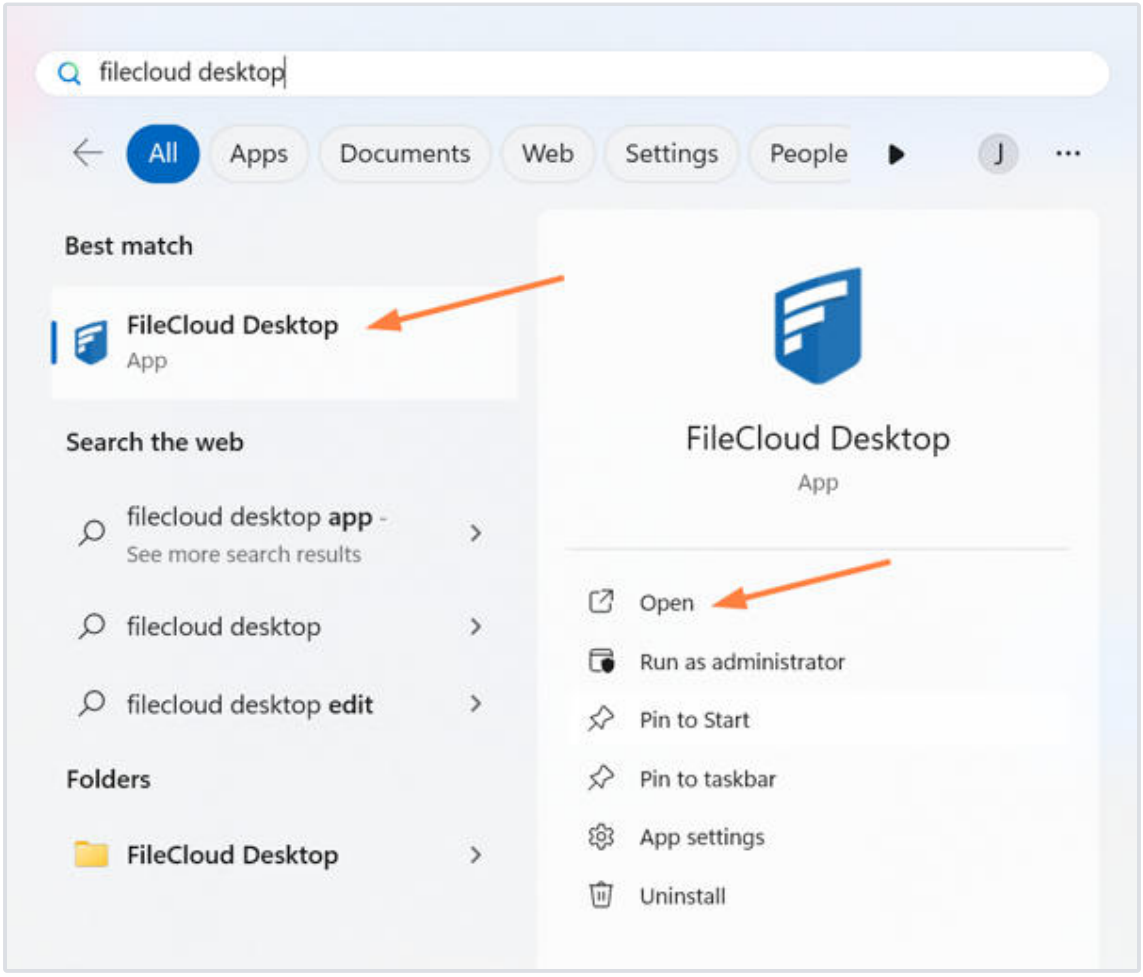
The option to choose the drive letter that displays the FileCloud for Desktop folders in Windows explorer is available beginning in FileCloud Desktop for Windows 23.253.

Before logging in, close any apps that may have files open in your sync folder. If FileCloud Desktop can't rename or move the sync folder because another application has a file open in it, login may fail.

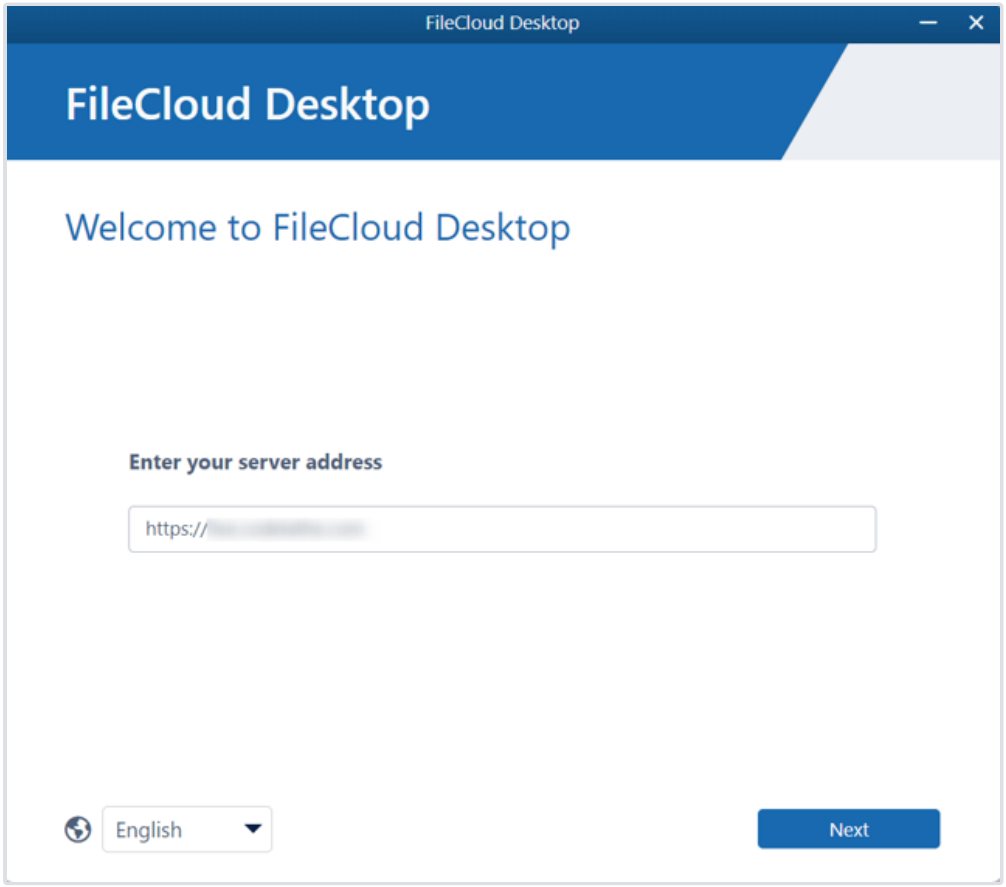
Initially, the login page for FileCloud Desktop opens after you install it. After that, by default, it opens automatically when you start up your computer. If you do not want it open automatically on startup, you can change the setting in FileCloud Desktop.

To open and log in to FileCloud Desktop for Windows:

1. Search for FileCloud Desktop in the Windows Start menu, and choose **Open**.



2. In the first screen of the login wizard, enter your server address.
   If you want to view the user interface in a different language than the default shown, choose a different option.

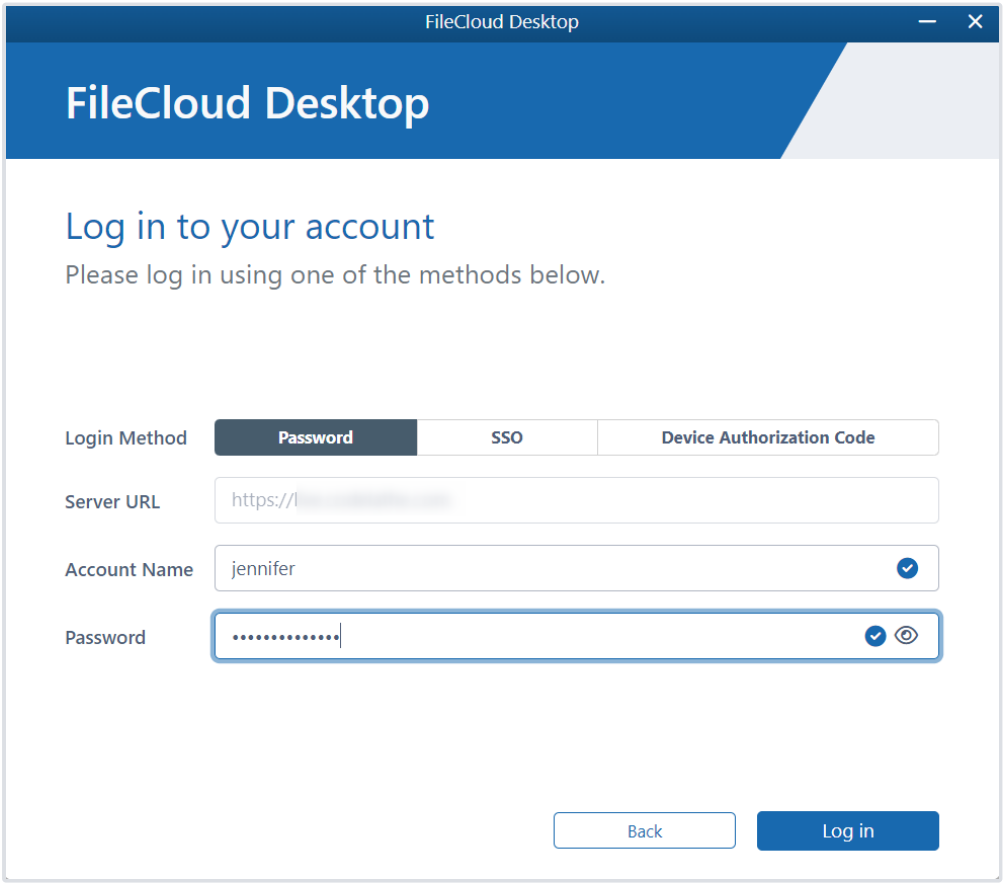


The next screen asks you to choose a login method.

3. Choose one of the following login methods:

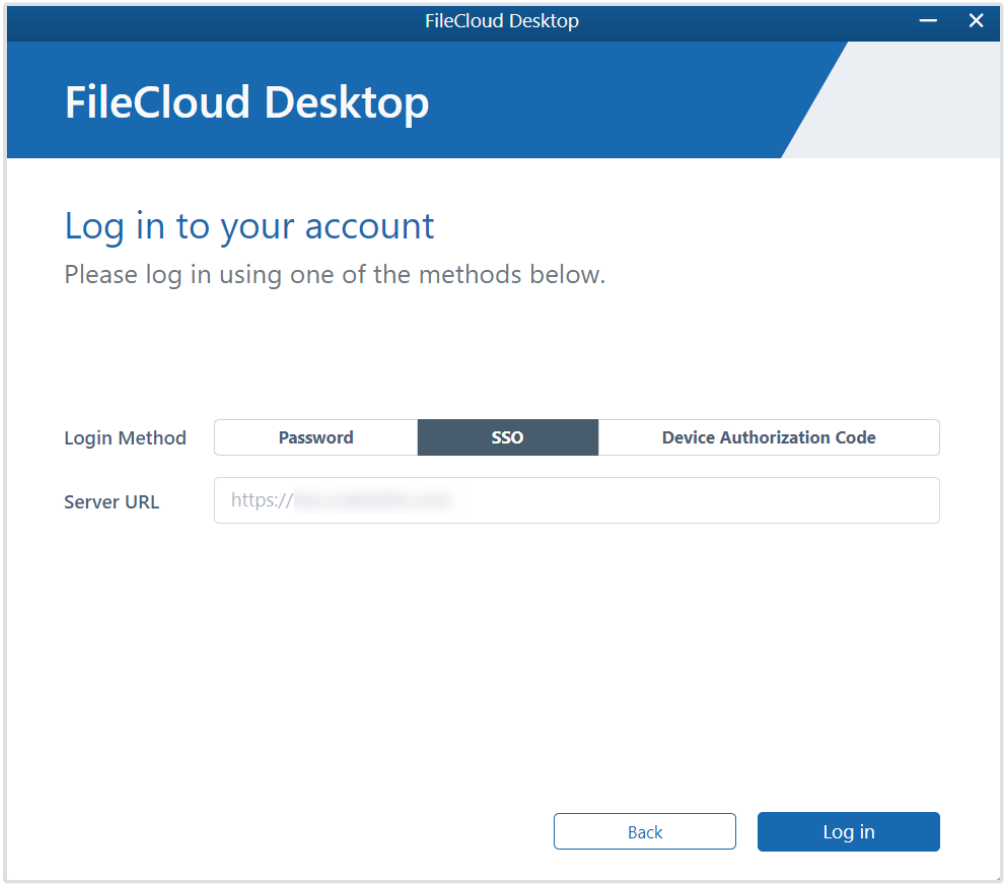
Log in with password

Leave **Password** selected for **Login Method**, and enter your **Account Name** (username), and **Password**, and click **Log in**:



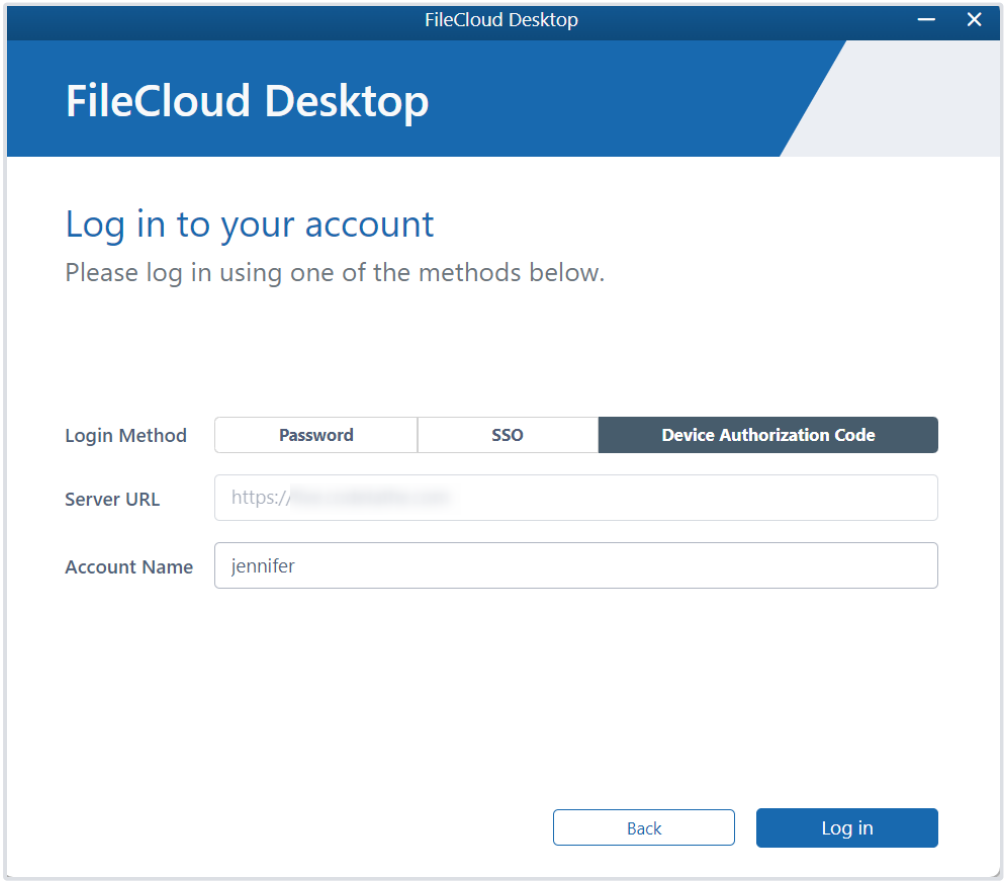
Log in with SSO

1. Select **SSO** for **Login Method**.
   The screen changes; now it only displays a field for **Server URL.**
2. Type the address to the FileCloud server that was sent to you when your FileCloud account was created, and click **Log in**.
   You are redirected to the **SSO Login** page, where you can enter your username and SSO password to log in.

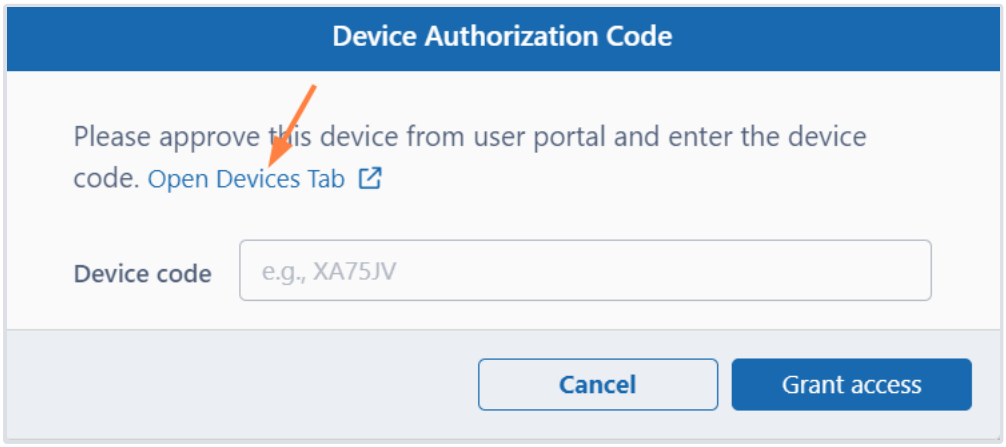


Log in with Device Authorization Code

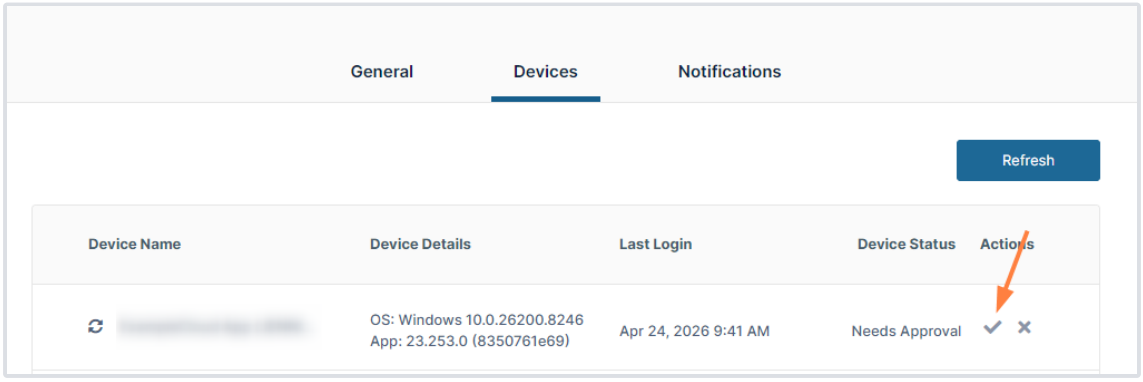
1. Select **Device Authorization Code** for **Login Method**.
   The screen changes to:



2. Enter your **Server URL** and **Account Name** (username), and click **Log in**.
   A **Device Authorization Code** dialog box opens.
3. Click the **Open Devices Tab**.



   The log-in screen of the user portal opens.
4. Log-in to the user portal.
   The Devices tab in the Settings page opens:
5. Next to the listing for FileCloud Desktop, click the check.



A dialog box with the device authentication code opens.

6. Enter the authentication code into the **Device code**, and click **Grant access**.

Log in with MFA (multi-factor authentication)

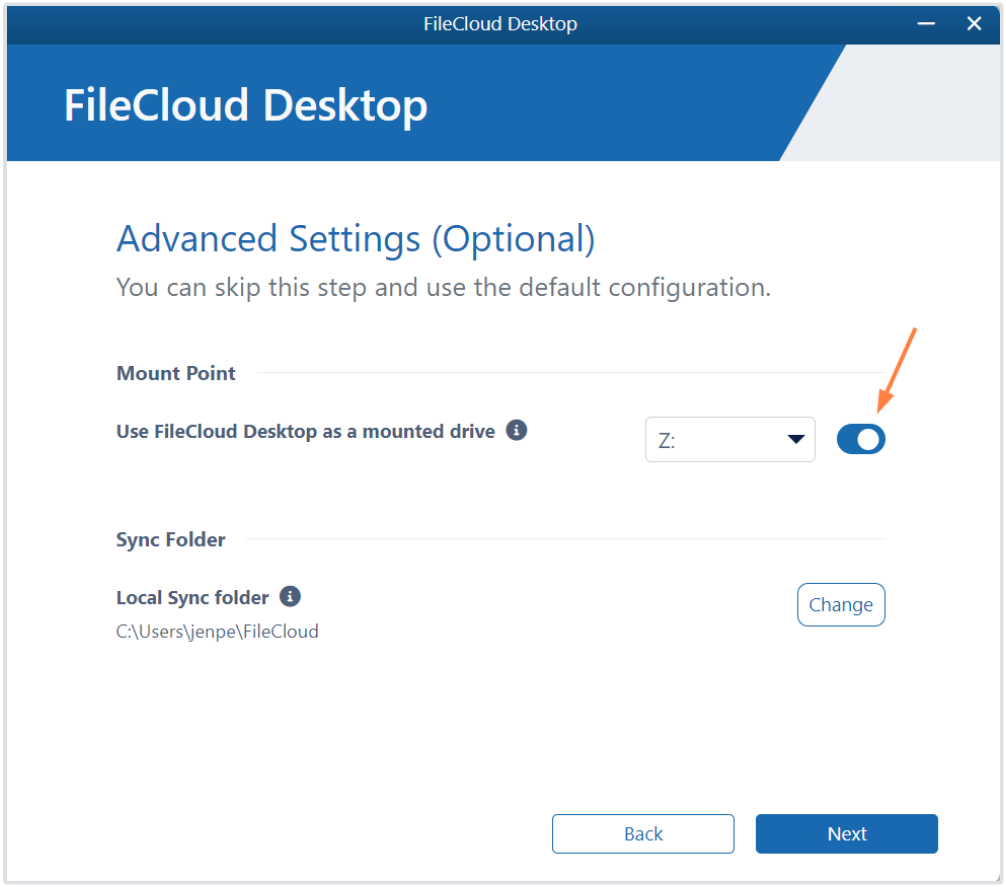
If you have not yet set up MFA, you are prompted to set it up in the web browser.

If you have set up MFA in the web browser, you are prompted to login in with the MFA method or default MFA method you have chosen.
See Log in Using Multi-Factor Authentication for help setting up and logging in with MFA.

The next wizard screen contains an option for selecting **Mount Point**, a drive letter that has access to your FileCloud Desktop files and an option for changing your **Local Sync Folder**.

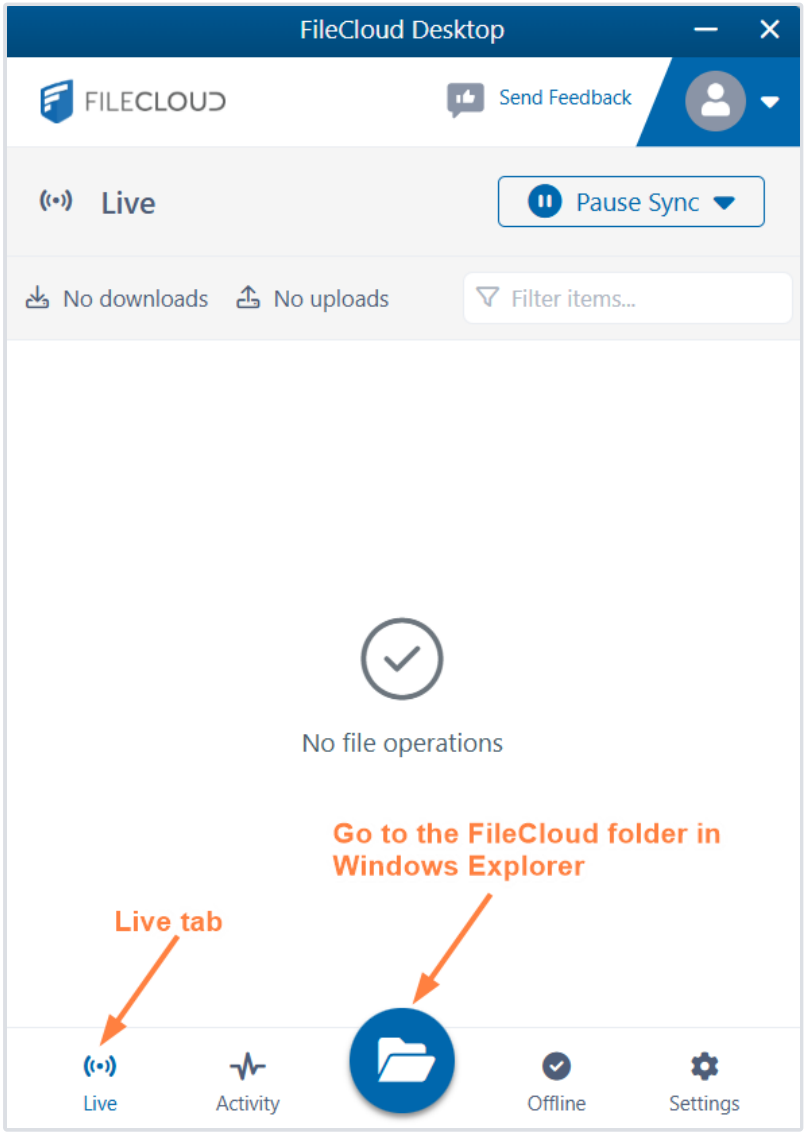
A **Mount Point** ensures correct functioning if your content uses Excel macros or cross references other files. Only specify it in these scenarios; otherwise, leave the setting at **Default**.
⚠ Although the drive letter appears in Windows Explorer, you are not intended to work with the FileCloud Desktop files from that location; work from them in the FileCloud Desktop root that is selected when you click the folder icon in the dashboard.

4. To choose a mount point, enable the toggle beside it.

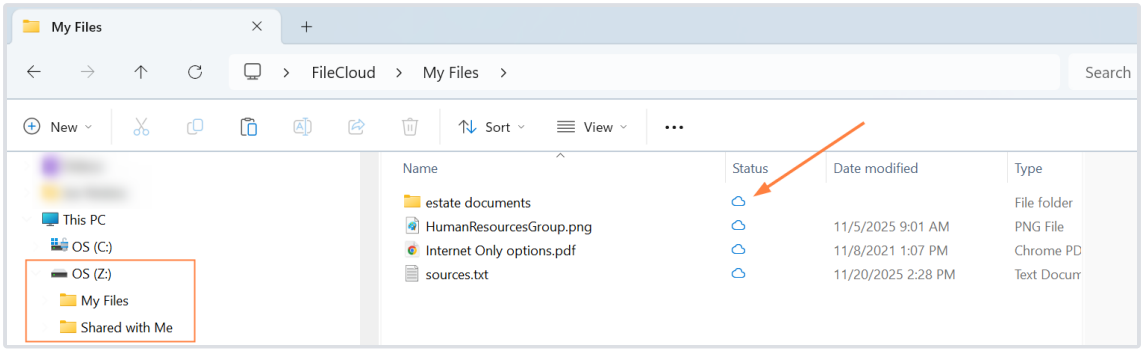


The drop-down list now shows the available mount point letters.

5. Choose a letter.
   Your FileCloud Desktop files will appear in Windows explorer at that location, but you cannot work with them from there; continue to work with them from the FileCloud Desktop root.
6. To change your sync folder to a different location, click **Change** beside it, and choose a new location.
   Continue to move through the wizard until the dashboard opens to the **Live** screen. FileCloud Desktop cannot begin tracking and synchronizing online and offline FileCloud file activity until you download FileCloud folders and files to your local drive. So initially, the **Live** tab appears empty.
   Click the folder icon at the bottom of the FileCloud Desktop dashboard to view the FileCloud folder, which now appears in File Explorer.



If this is the first time you have logged in to FileCloud Desktop, each file and folder should appear with a cloud icon next to it, which indicates that it hasn't been downloaded locally (made available offline) yet.



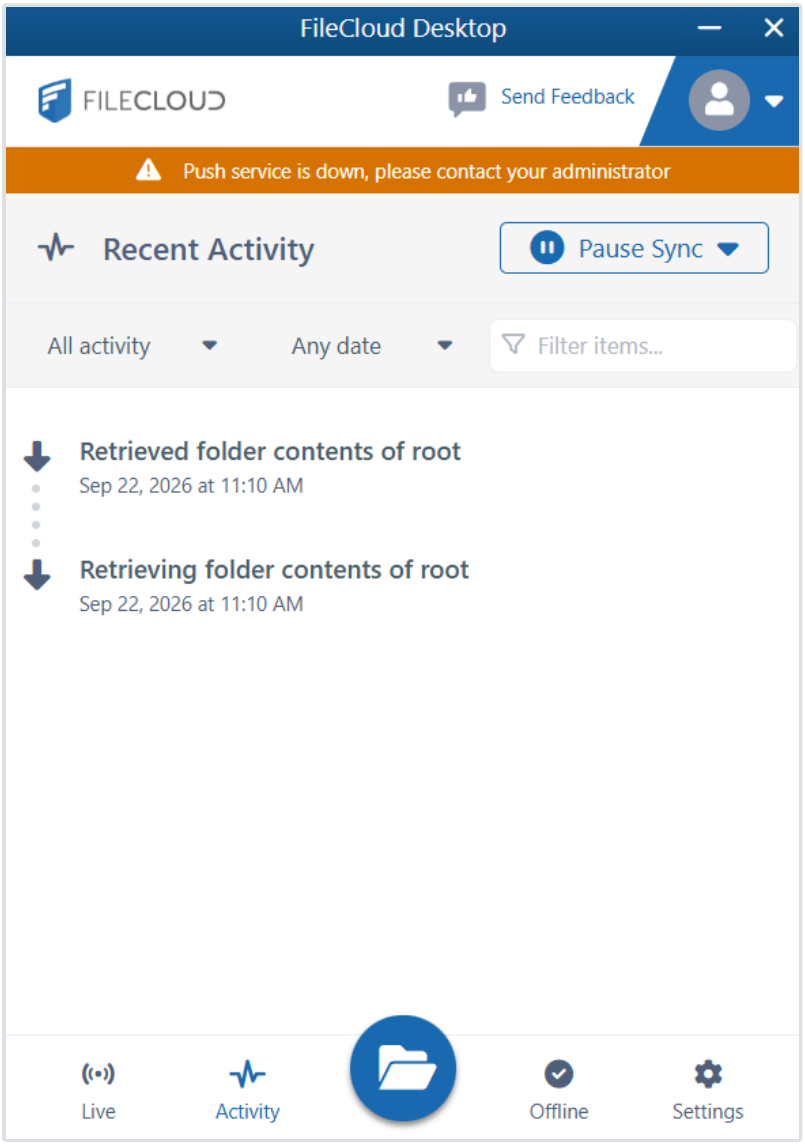
Begin setting up FileCloud Desktop by making FileCloud files and folders available offline.

For more information about the dashboard, see Using the Dashboard in FileCloud Desktop for Windows.

If you could not log in to FileCloud Desktop, and you closed any apps that may have had files opened in the Sync folder, ask your IT department to add the Sync root location to security software allowlists.

Push service is down

If the **Push service is down** warning appears at the top of your dashboard, you are unable to sync files and folders. Please contact your admin, who is able to restart the service so that you are able to sync files and folders again.



Admins: If users are seeing the **Push service is down** warning, restart the Push service from the FileCloud admin portal.

Installing or Upgrading FileCloud Desktop for Windows

See Requirements for the supported versions of Windows OS for FileCloud Desktop for Windows.

If you are operating in an air-gapped or restricted network environment, you may experience significant delays during installation (5-10 minutes) or initial launch (30+ seconds) of FileCloud Desktop for Windows. These delays occur while the application waits for requests to servers without outbound internet access to time out.

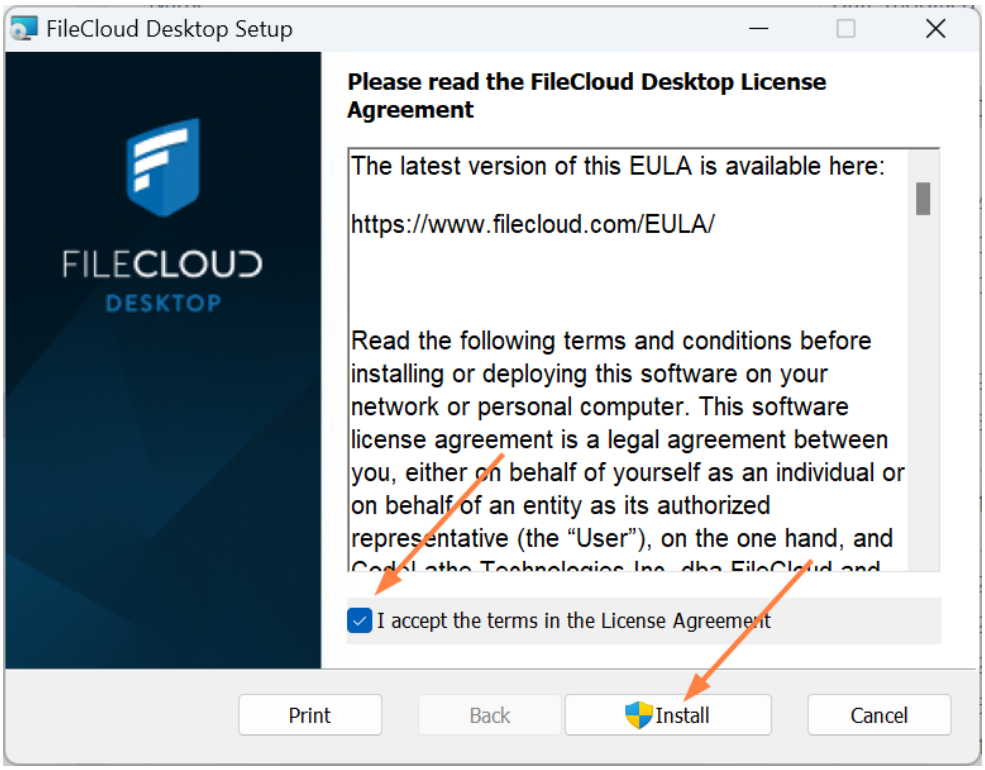
The application may appear stuck or frozen during this time; however after the Windows requests time out, installation or launch begins again without loss of data or functionality.

Administrators: To reduce the Windows network timeout duration, you may locally host Certificate Revocation Lists (CRLs) or adjust Group Policy settings. Please consult your network security team to determine the best option for your specific infrastructure.

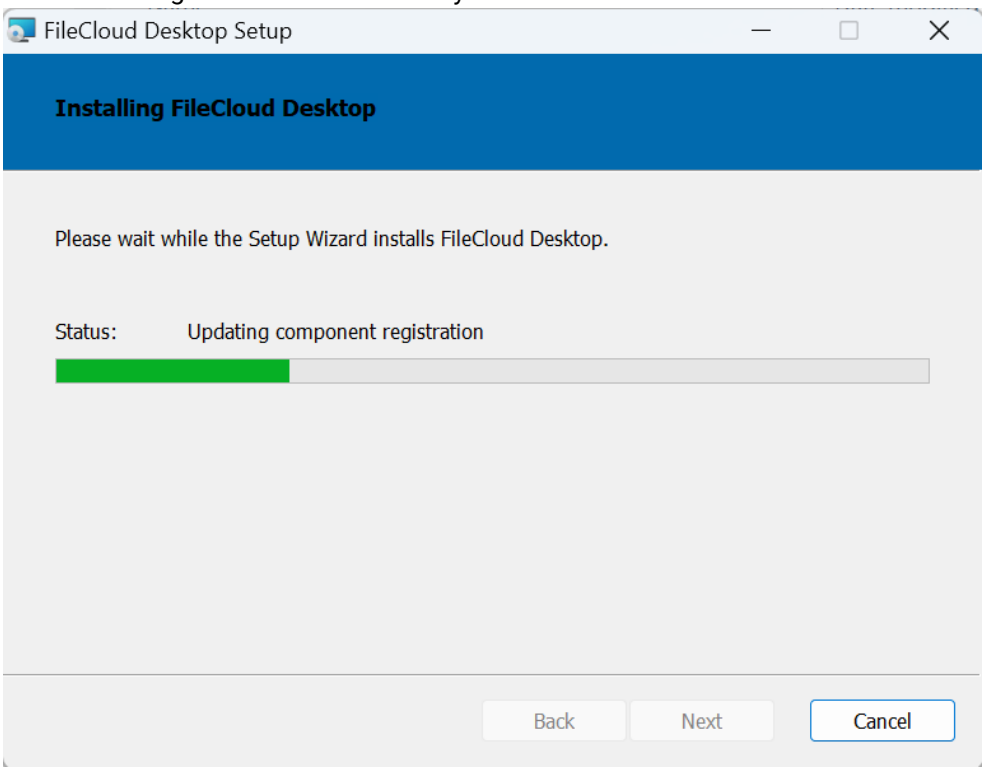
To install or upgrade FileCloud Desktop on Windows:

After you initially install FileCloud Desktop for Windows, it updates automatically, and you are not required to perform the following process to upgrade (unless you are using a version of FileCloud prior to 23.261).

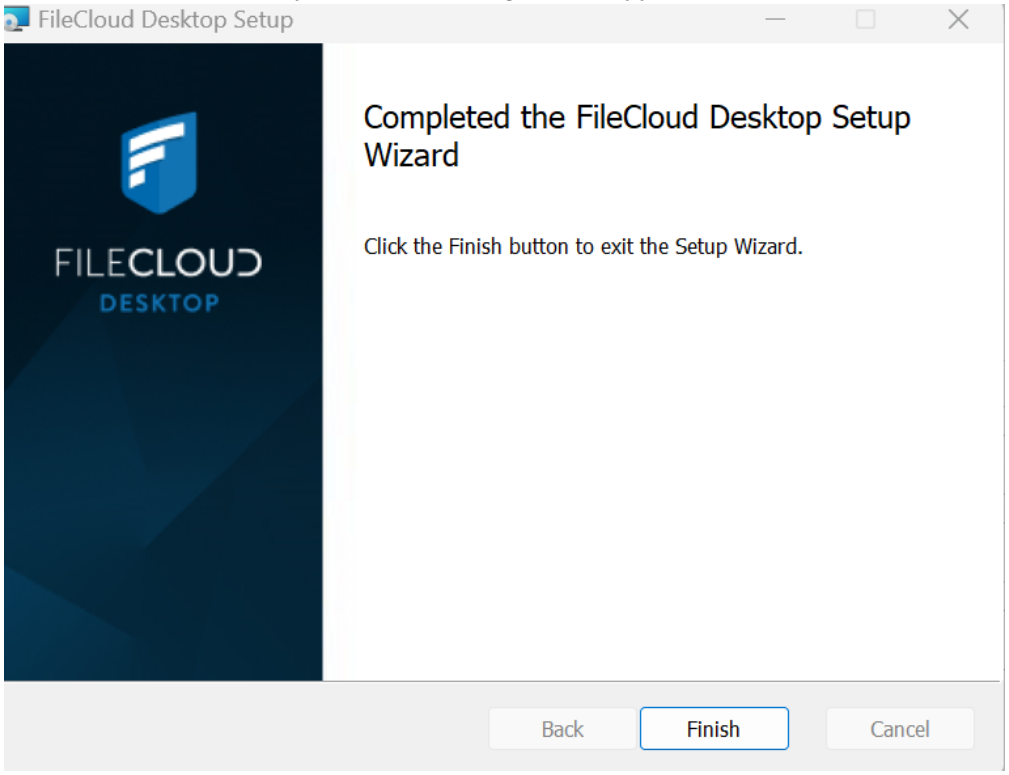
1. ⚠ Uninstall FileCloud Sync if it is installed on the same machine that you are installing FileCloud Desktop on; otherwise, FileCloud Desktop will not work properly.
2. Install FileCloud 23.232 or higher if you have not already done so.
3. Run **FileCloudDesktopInstaller.msi**.
   The installer's welcome screen opens:



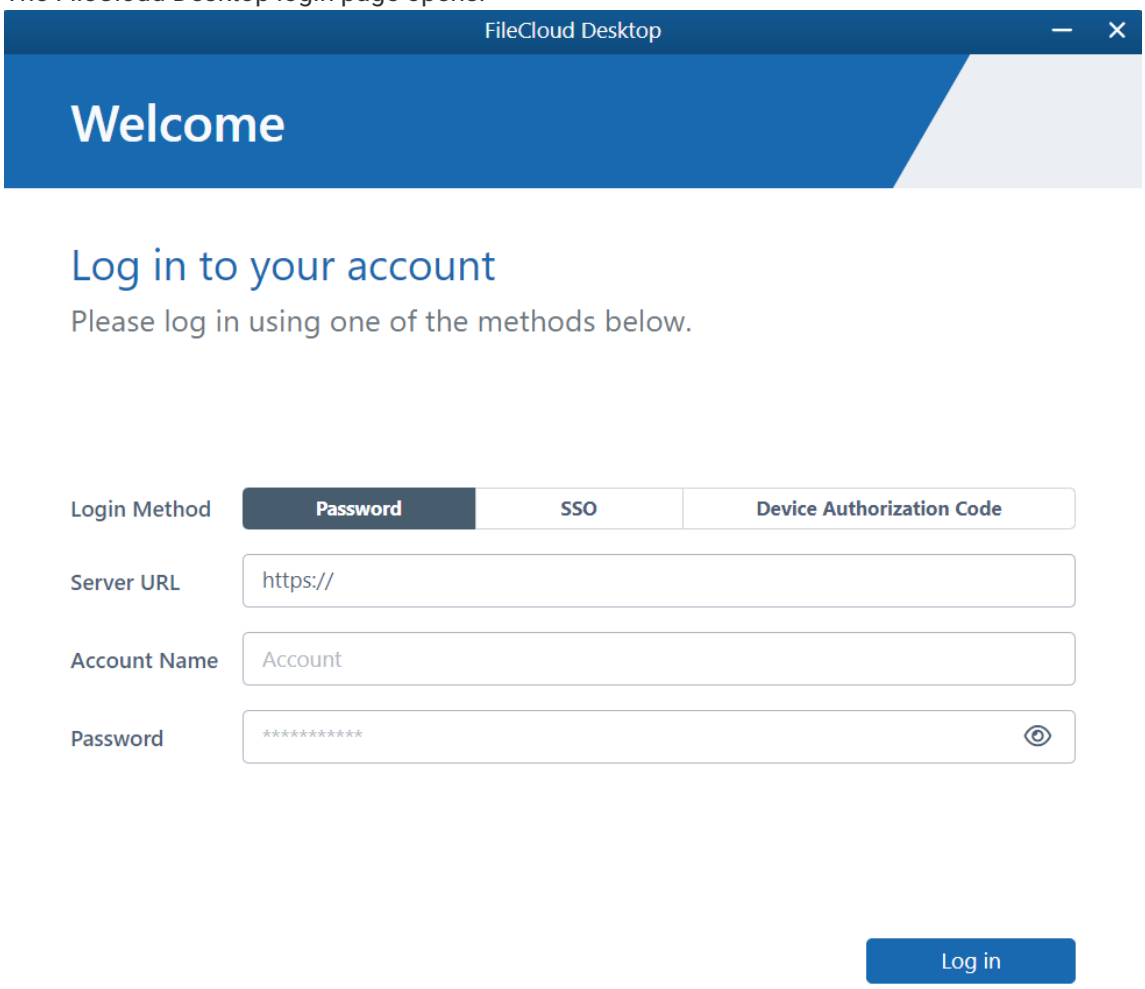
4. Read the license agreement, and check **I accept the terms in the License Agreement**.
5. Click **Install**.
   Installation begins. The wizard shows you installation status.



When installation is complete, the following screen appears:



6. Click **Finish**.
   The FileCloud Desktop login page opens.



To migrate from FileCloud Sync to FileCloud Desktop for Windows:

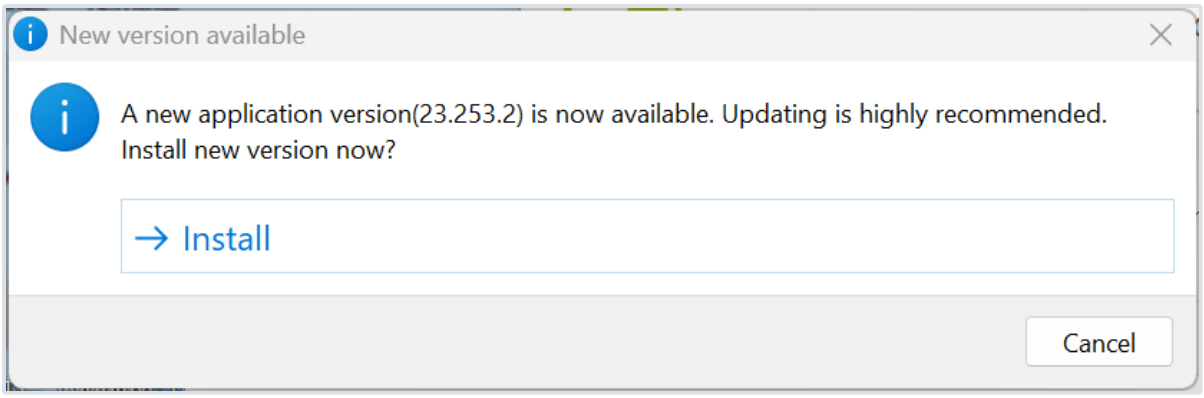
1. Upload all files and folders that you want to migrate from FileCloud Sync to FileCloud Desktop for Windows to the FileCloud server.
2. Uninstall FileCloud Sync.
3. Install FileCloud Desktop for Windows following the procedure above in **To install or upgrade FileCloud Desktop on Windows**.
4. When you log in to FileCloud Desktop for Windows, a new sync root for the application is populated from the server with your files.

How autoupdates work

Beginning in FileCloud 23.261, FileCloud Desktop for Windows is updated automatically by default.

If an autoupdate is available when a user is logged out of FileCloud Desktop for Windows, updating automatically occurs.

If an autoupdate is available when a user is logged in to FileCloud Desktop for Windows (or when a user logs in), the user is prompted with the message:

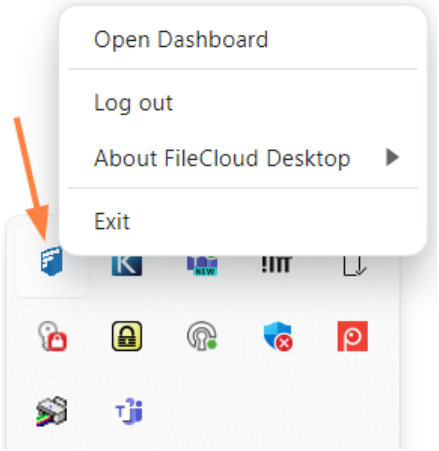


If the user clicks **Install**, FileCloud Desktop is upgraded and the application restarts automatically.

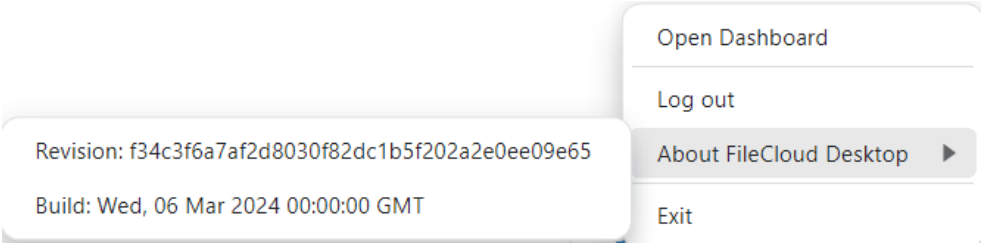
If the user cancels without installing, upgrade either occurs when FileCloud Desktop is not running, or when the user logs in, sees the install prompt again, and chooses **Install**.

Working from the FileCloud Desktop for Windows Taskbar Icon

After you log in to FileCloud Desktop for Windows, a FileCloud icon appears in the taskbar. You can right-click on the icon to perform FileCloud Desktop tasks.



- **Open Dashboard** - Opens the FileCloud Desktop for Windows dashboard.
- **Log out** - Logs the currently logged in user out of FileCloud Desktop for Windows without shutting down the application.
- **About FileCloud Desktop** - Shows details about the FileCloud Desktop build:



- **Exit** - Closes the FileCloud Desktop for Windows application.

On file conflict

If there is an existing file conflict, an additional task is listed:

- **Show Conflicts**

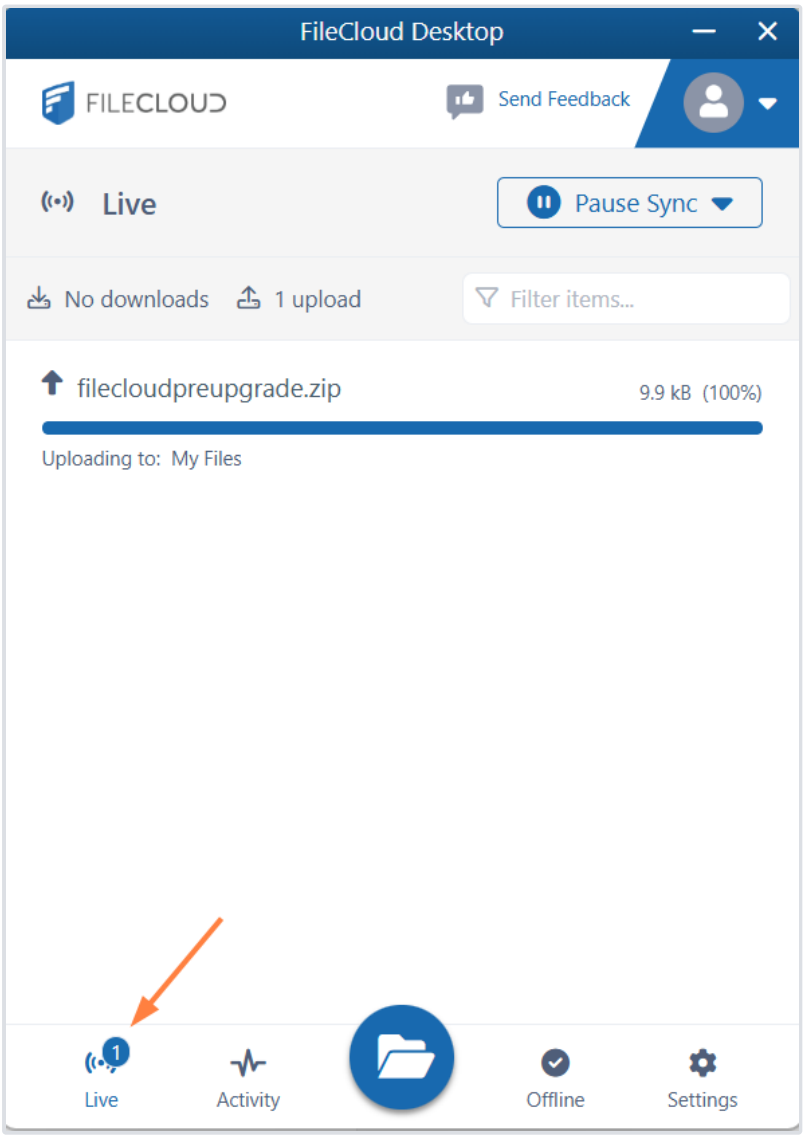
Clicking on it takes you to the Recent Activity tab in the dashboard where the conflict is listed. See How FileCloud Desktop for Windows handles change conflicts for more information about file conflicts.

Using the Dashboard in FileCloud Desktop for Windows

FileCloud Desktop for Windows opens to its dashboard, which has the tabs **Live**, **Activity**, **Offline**, and **Settings**, and a button for opening your FileCloud website (in Windows explorer).

Live tab

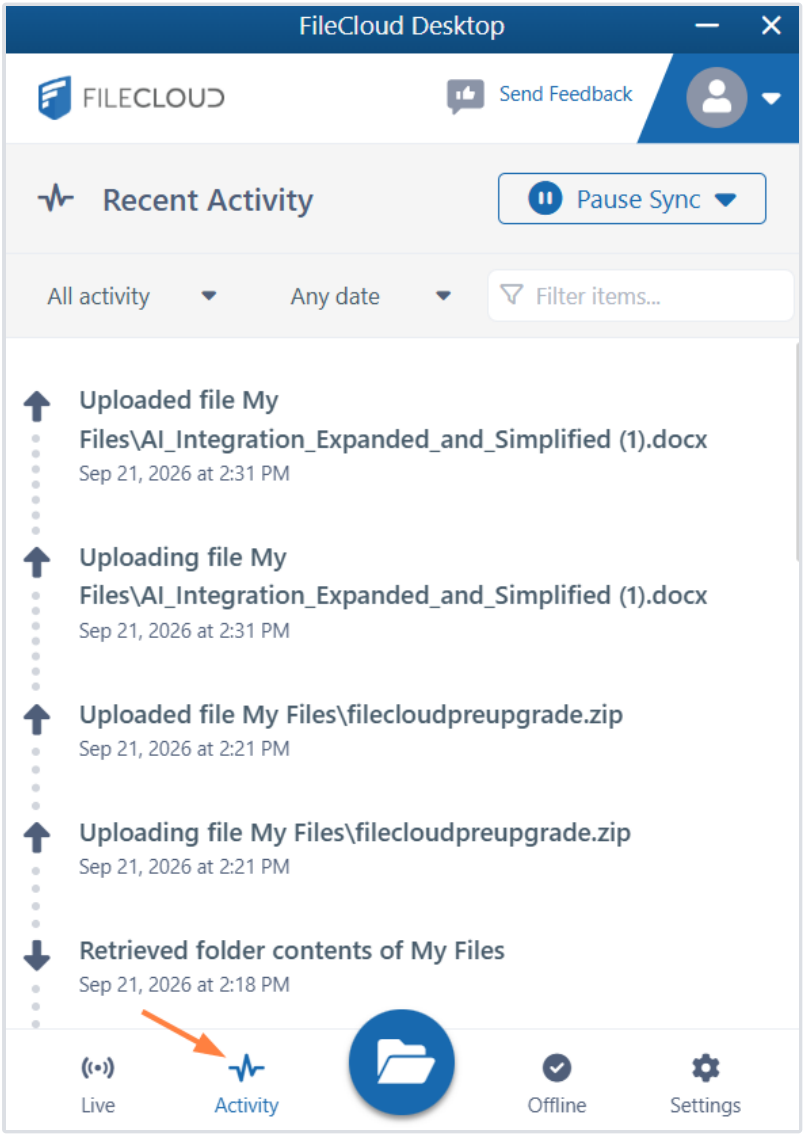
The dashboard opens to the **Live** tab, which shows current uploads and downloads of files and folders.



- You will only see uploads and downloads that take a substantial amount of time in progress. To search for a file or folder in the list, enter a string from its name into the **Filter items** box.

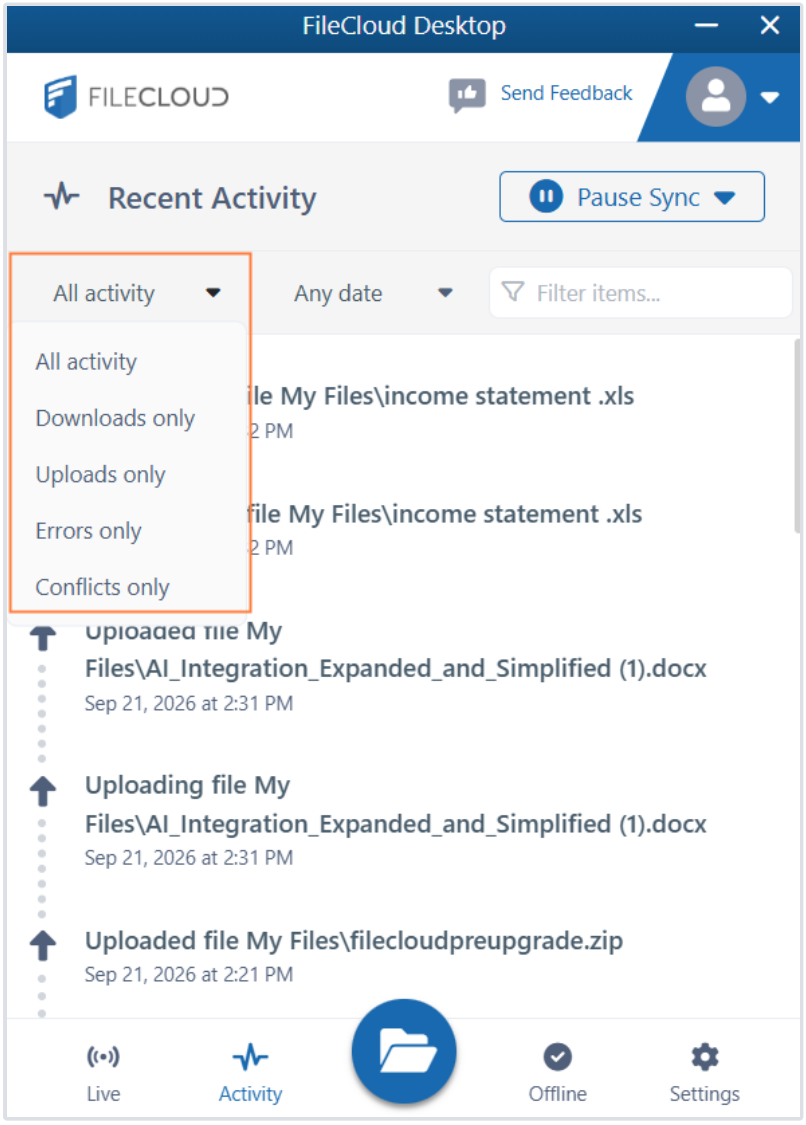
Activity tab

To view a list of recent FileCloud Desktop activities, click the **Activity** tab:

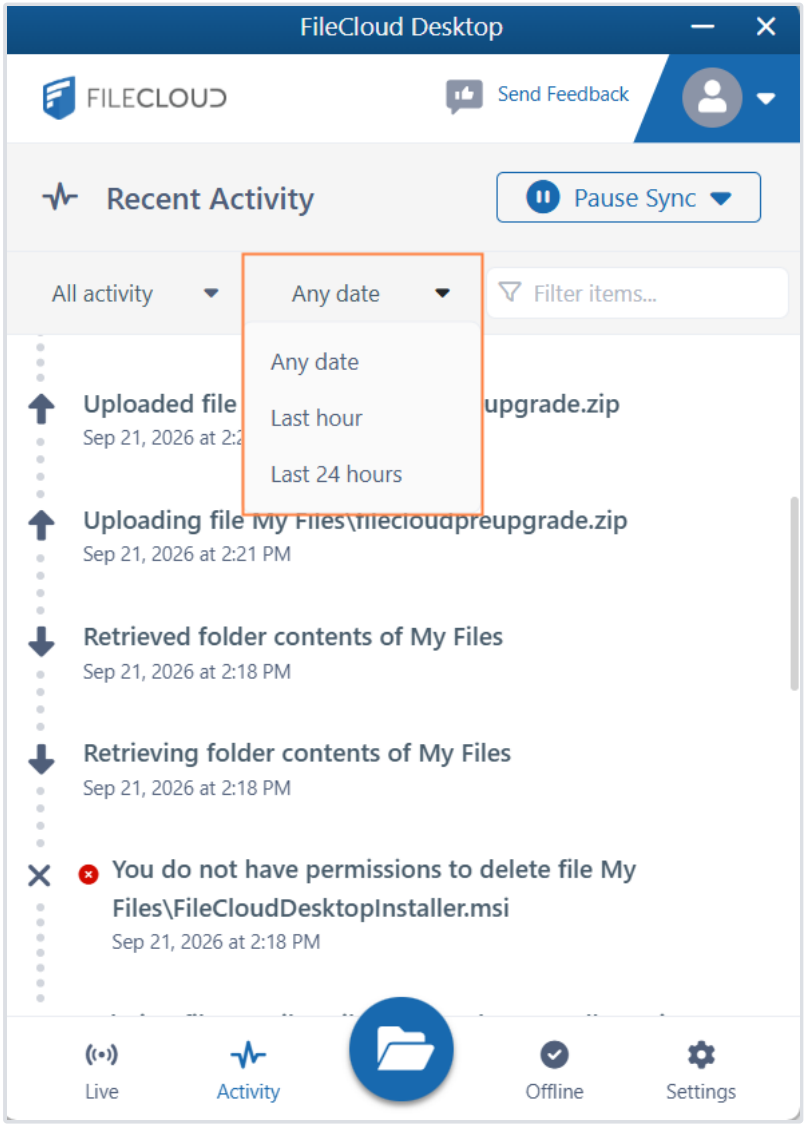


To filter activities on the Activity tab

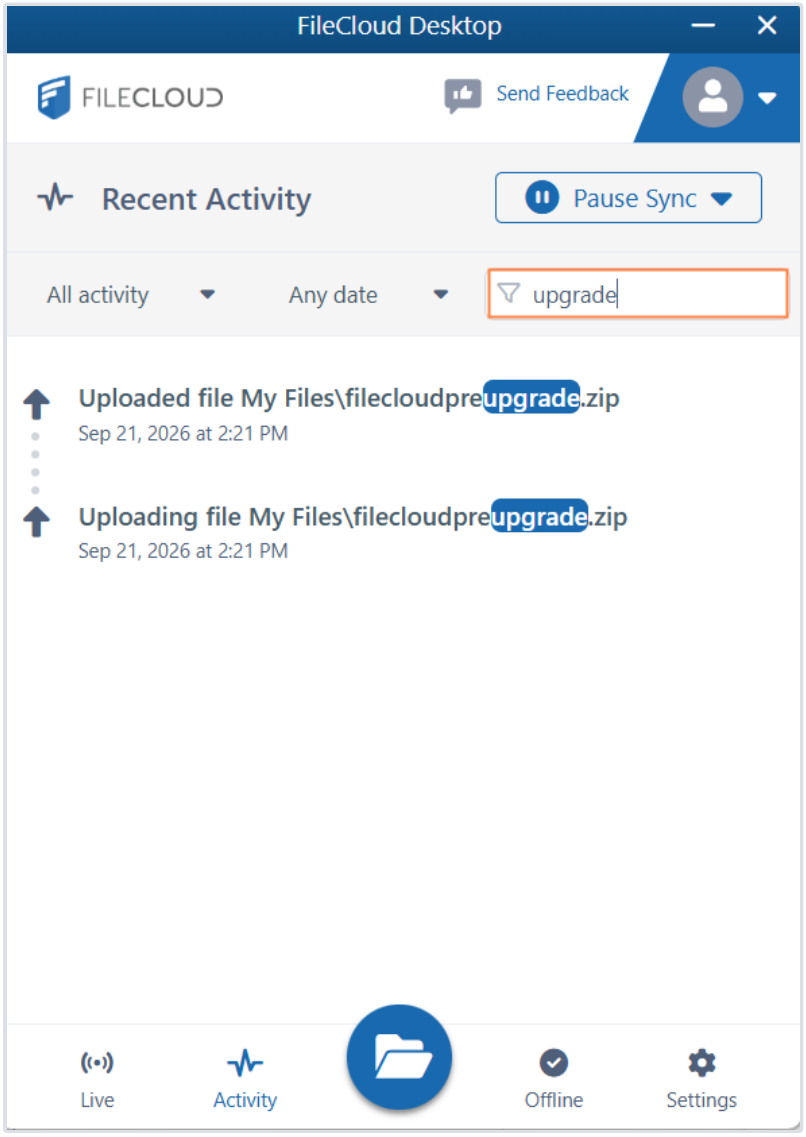
- To filter activities by activity type, choose an option in the Activity drop-down list.



- To filter activities by date, choose **Any date**, **Last hour**, or **Last 24 hours** in the Date drop-down list.

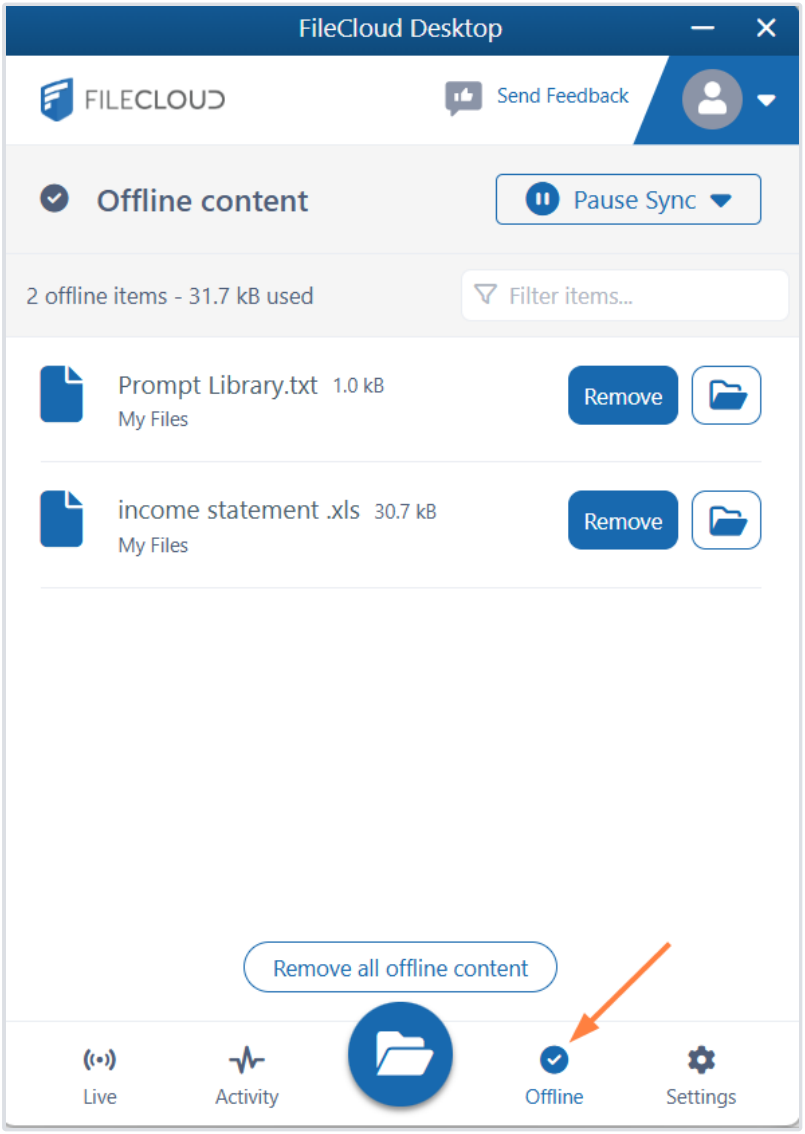


- To filter by any string in the listing (including the action, file path, date, or time) enter the string into **Filter items**.



Offline tab

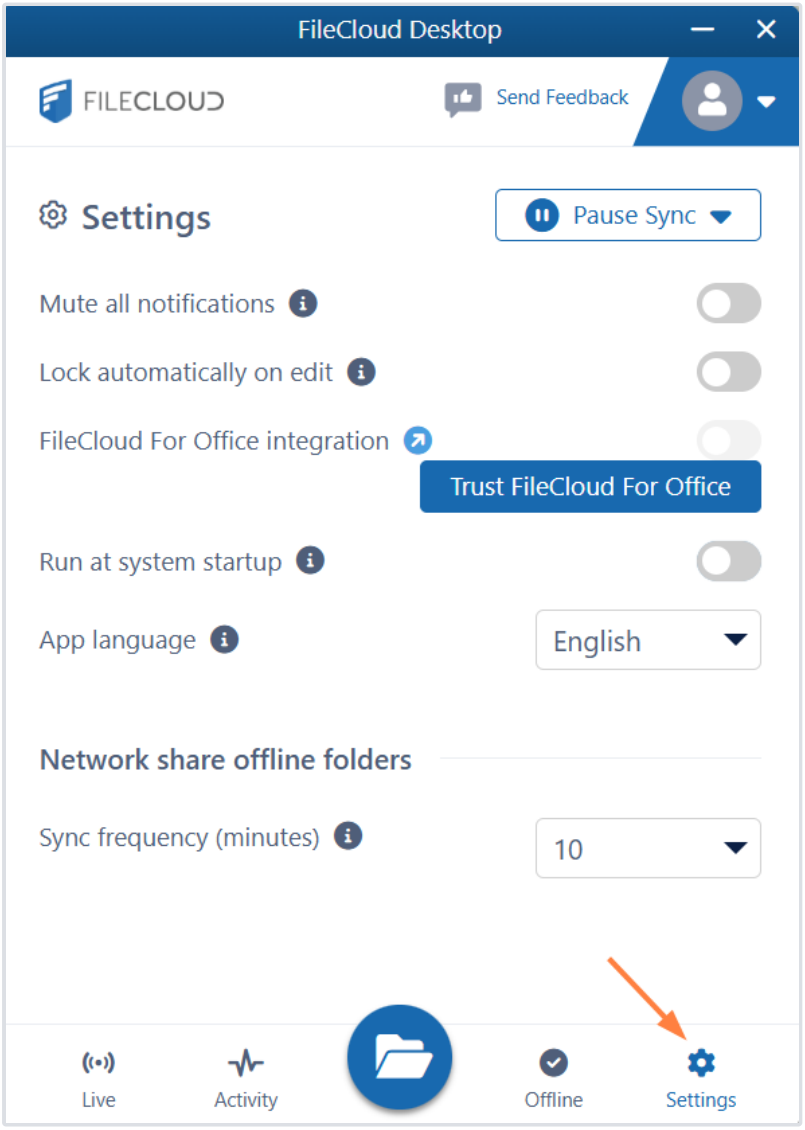
To view files and folders that you have moved offline using FileCloud Desktop, click the **Offline** tab.



- To remove folders from the offline location from the **Offline** tab, see Remove Files from Offline Folders.
- To open an offline folder in its location in Windows explorer, click the folder icon next to it.

Settings tab

To view FileCloud Desktop for Windows settings, click the **Settings** tab.

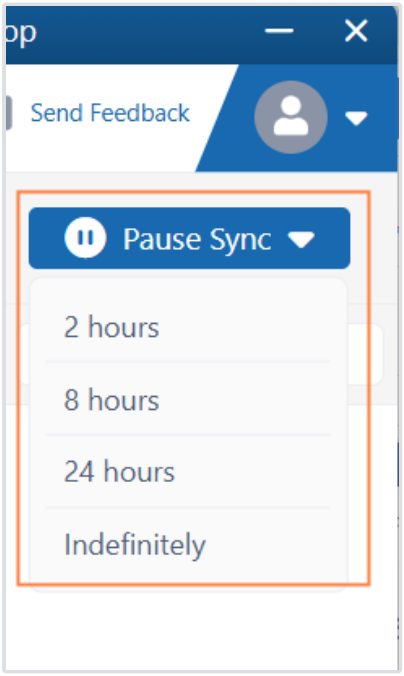


For information about FileCloud Desktop settings, see FileCloud Desktop for Windows Settings.

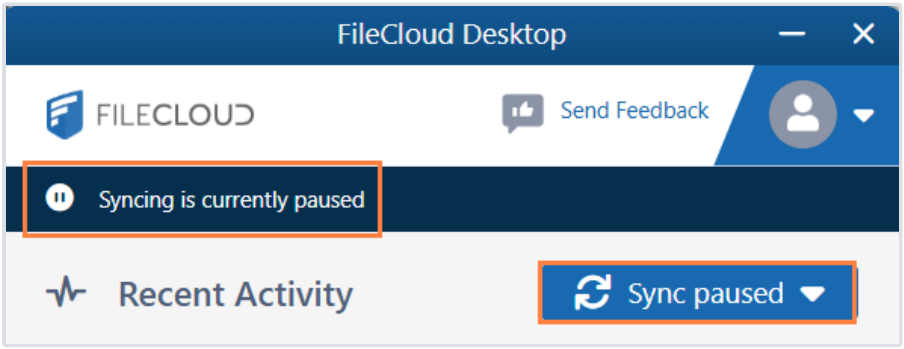
Pausing sync

The **Pause Sync** button appears on all tabs in the dashboard, and enables you to temporarily pause syncing to preserve system bandwidth or cancel a file transfer temporarily.

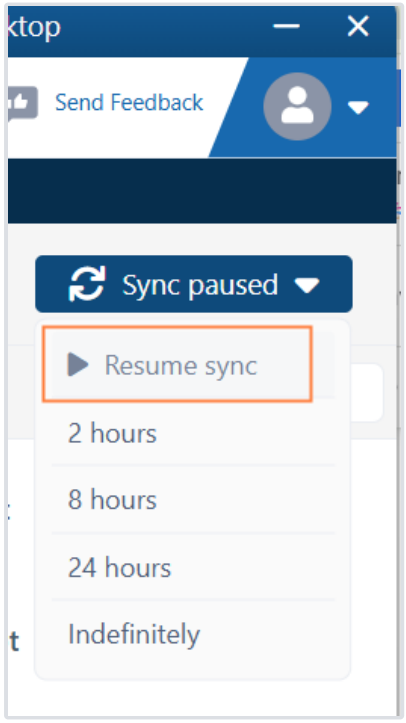
When you click the **Pause Sync** button, you may choose **2 hours**, **8 hours**, **24 hours**, or **Indefinitely** in the drop-down list.



Once you choose an option, syncing is paused for the chosen interval and on each tab, the **Pause Sync** button appears as **Sync paused** and a banner appears across the top indicating that sync is currently paused.

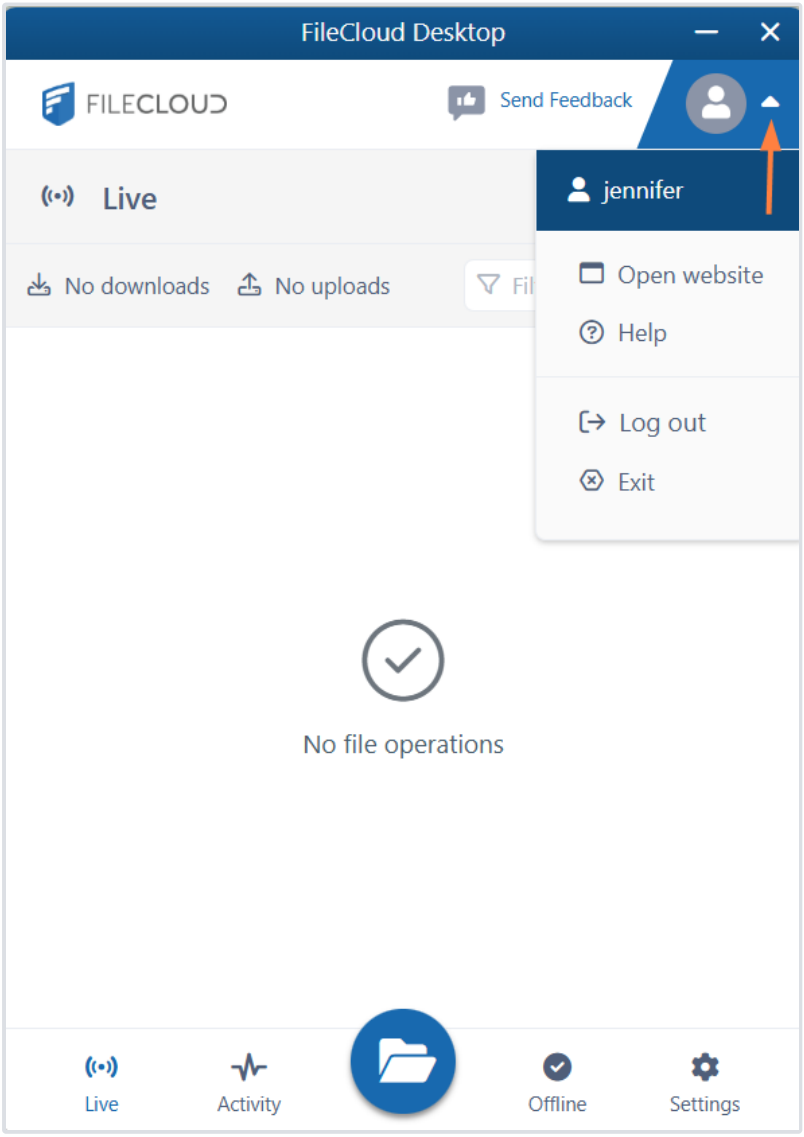


You can restart sync manually if you have chosen **Indefinitely** or before your chosen interval is over by clicking Sync paused, and choosing **Resume sync**.

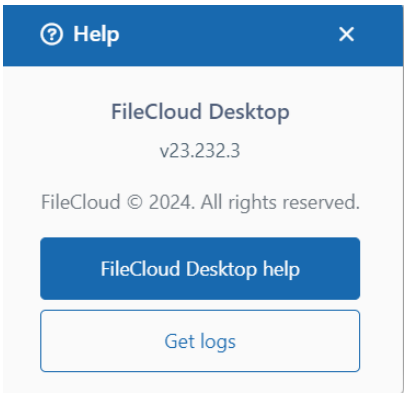


More options

To access more options from the FileCloud Desktop for Windows dashboard, click the arrow next to the user image:

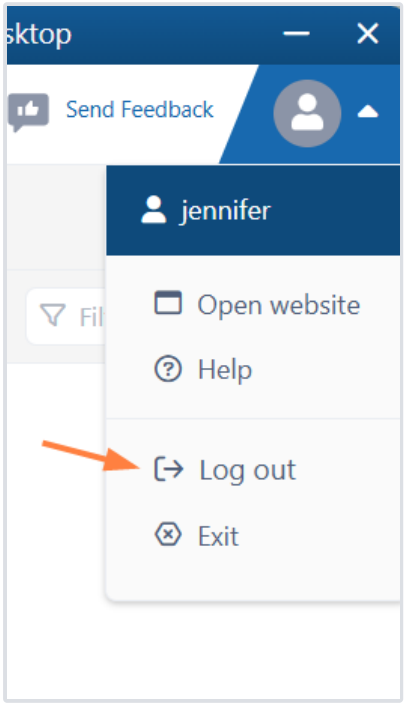


- To open your FileCloud user portal, click **Open website**.
- For this end user help, log files, and the version of FileCloud Desktop for Windows that you are running click **Help**.
  The following dialog box opens:

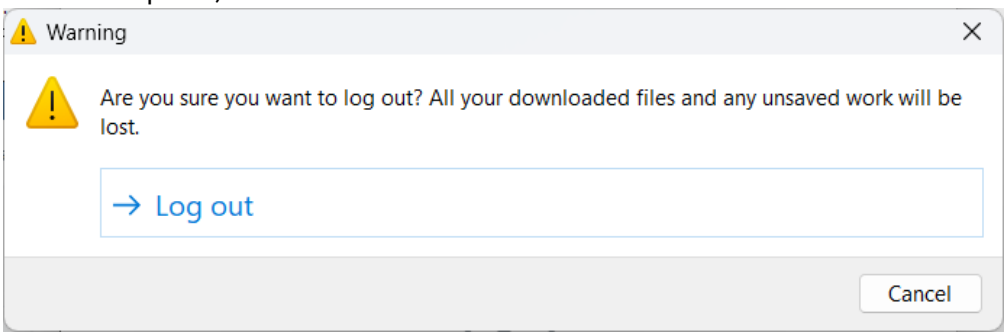


Click **FileCloud Desktop help** to access this end user help.
Click **Get logs** to access the contents of the **Logs** folder for FileCloud Desktop.

- To log out of FileCloud Desktop for Windows, click **Log out**.



You are warned that logging out will clear and remove the FileCloud folder that appears in the Windows Explorer, and asked to confirm.

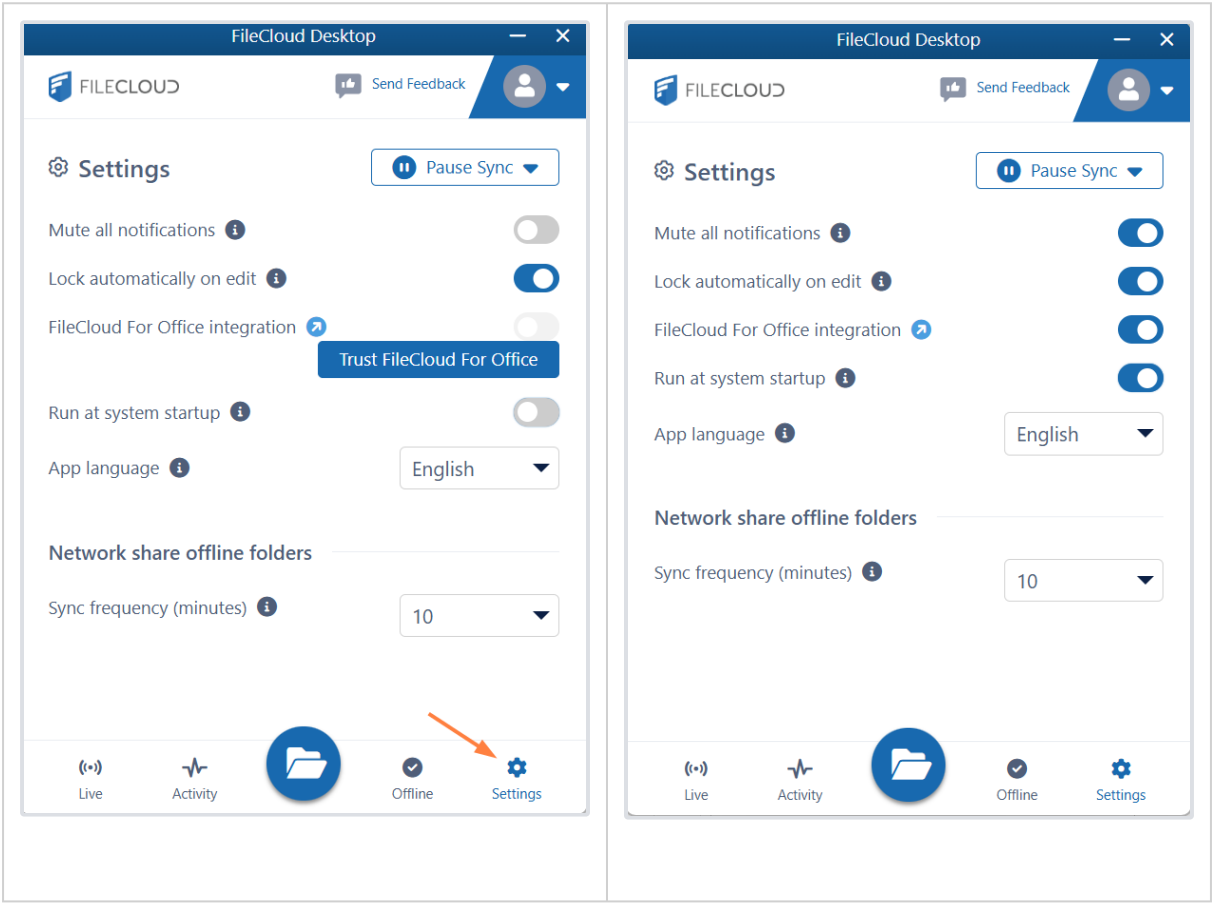


Click **Log out**.

- To close FileCloud Desktop for Windows without logging out, click **Exit**.

FileCloud Desktop for Windows Settings

To change your settings in FileCloud Desktop, click the **Settings** tab at the bottom of the dashboard.



Setting	Description	
Pause Sync	Click and choose an interval option to pause syncing. Available intervals are 2, 8, and 24 hours, and indefinitely. This is useful if you need to conserve bandwidth temporarily but resume syncing later. When clicked, the button appears as **Sync paused**, and the option **Resume sync** becomes available. **Note**: The **Pause Sync** button appears on every tab in FileCloud Desktop, and sync can be paused and resumed from any tab.	

Setting	Description	
Mute all notifications	When enabled, all notifications sent from FileCloud Desktop are turned off. Default is **disabled**.	
Lock automatically on edit	When enabled, files opened for edit through FileCloud Desktop are locked, and other users cannot edit them. When the files are closed they are unlocked again. Default is **enabled**.	
Trust FileCloud for Office/ FileCloud for Office integration	FileCloud for Office is an add-in that allows users to: • Automatically lock Office files when they open them • Share Office files while working with them in FileCloud clients When you initially install FileCloud Desktop, the **Trust FileCloud for Office** button appears. Click it to use FileCloud for Office. After you click the button, it disappears, and the **FileCloud for Office integration** setting is enabled, which means FileCloud for Office is active. When **FileCloud for Office** is disabled, FileCloud Desktop does not integrate with FileCloud for Office. Default is **disabled** (FileCloud for Office is available and appears in FileCloud Desktop).	
Run at system startup	When enabled, begin running FileCloud Desktop when the system starts. Default is **disabled**.	
App language	User interface language. Change to any of the language options. Default is **English**.	
Sync frequency (minutes)	Interval between automatic sync events for Network Folders. Choose any interval in the drop-down list. Default is **10** minutes.	

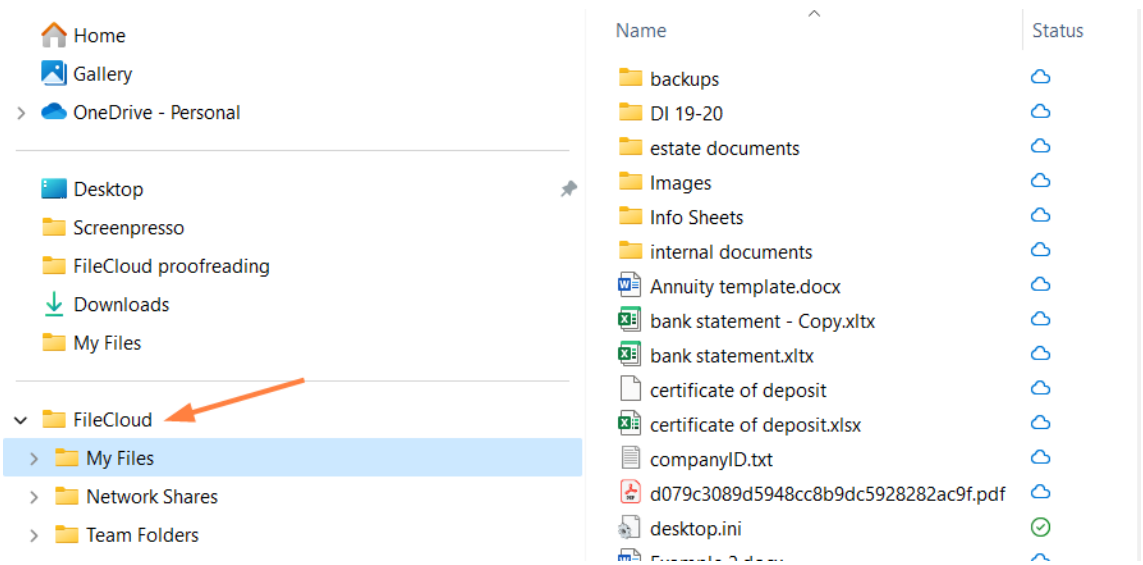
Make Files and Folders Available Offline in FileCloud Desktop for Windows

To use FileCloud Desktop for Windows to synchronize offline and online changes you make to FileCloud files and folders, first download the folders with contents that you want to synchronize.

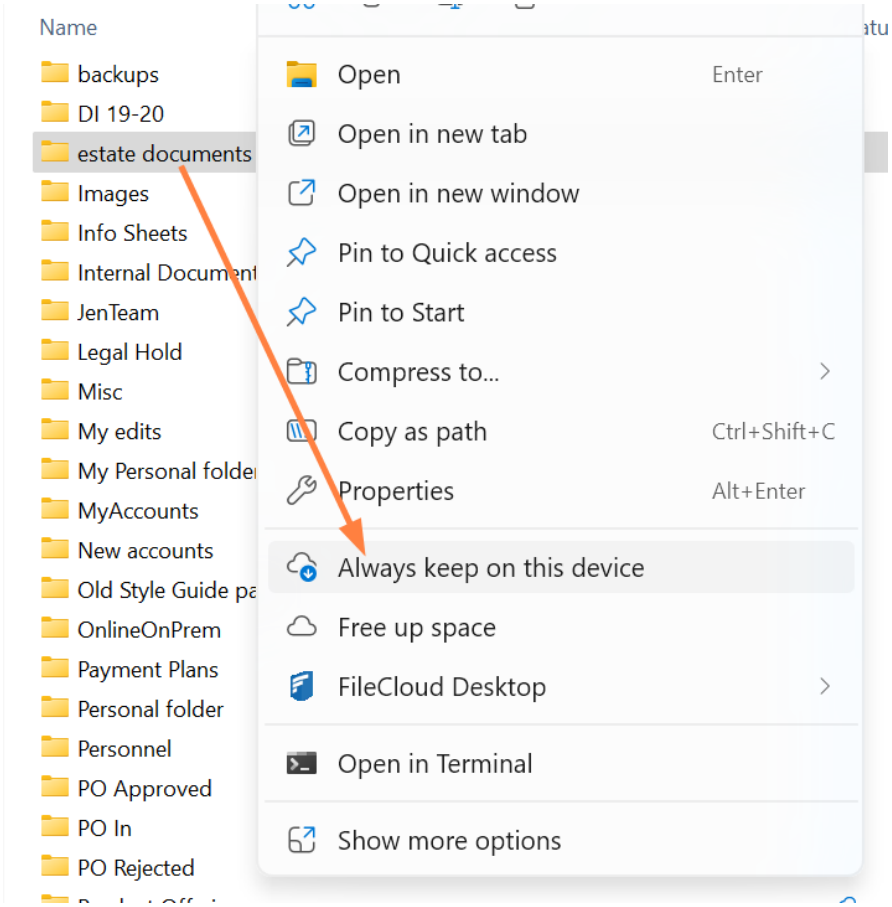
When you log in to FileCloud Desktop, your FileCloud files and folders become available in File Explorer in a **FileCloud** folder:

To make files and folders available offline:

1. In File Explorer, locate the FileCloud folder.

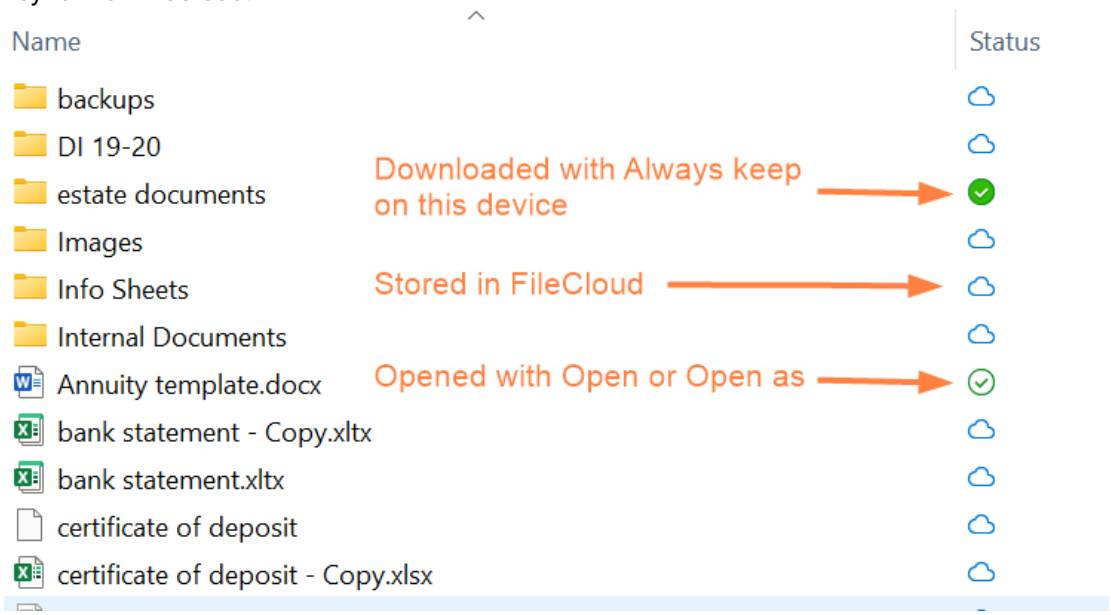


2. Right-click on each file or folder that you want to be able to synchronize, and choose **Always keep on this device**.
Note: You may have to right-click directly on the file or folder name to bring up the correct options.

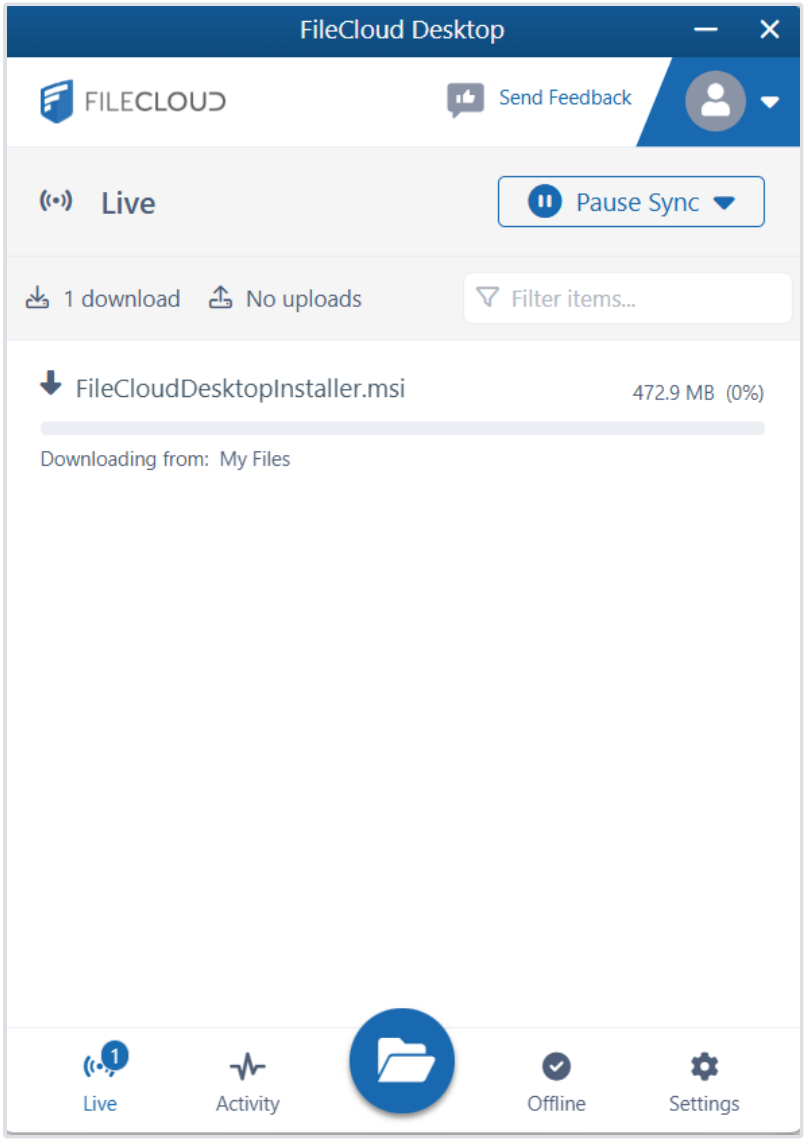


FileCloud downloads the file or the folder and its contents to your local drive (and moves it into its offline folder), and replaces the cloud icon with a green circle icon to indicate that it is

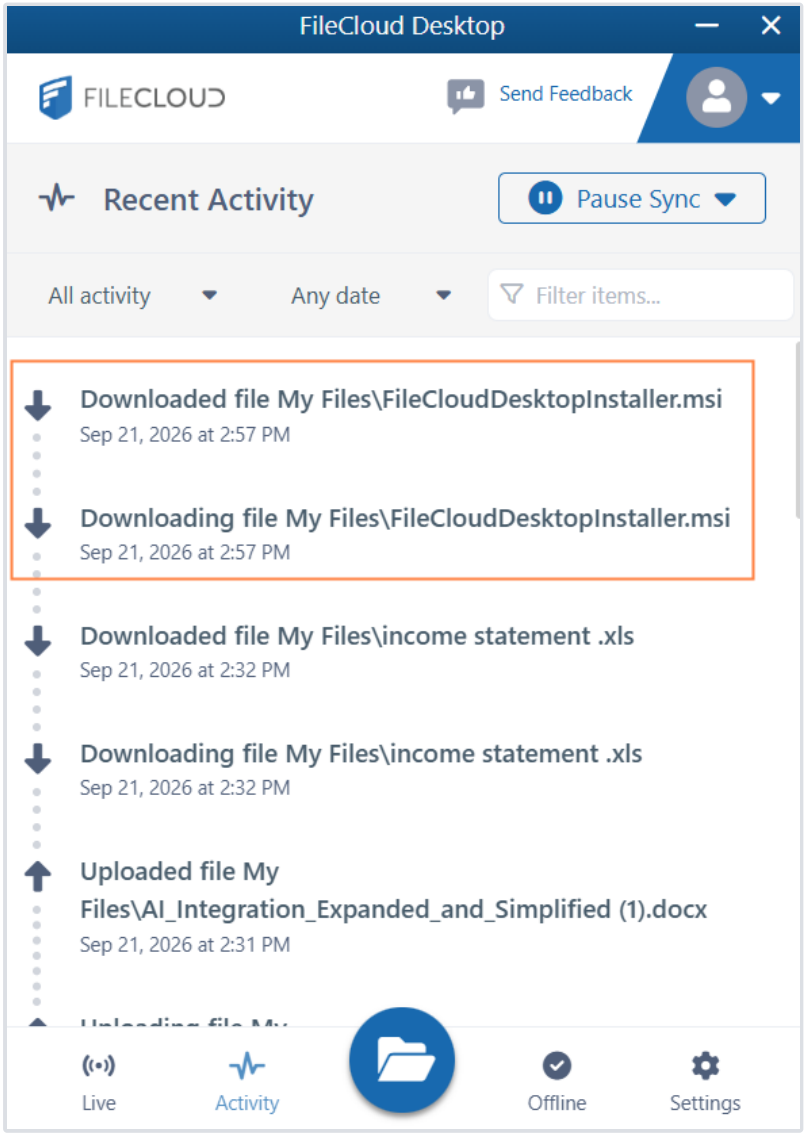
available offline. Changes to the offline files are now synced with the copies in FileCloud.
Note: If you click **Open** or **Open with** next to a file you can edit it offline, but its changes aren't synced with FileCloud. A file downloaded with **Open** has a white circle icon with a green check. You are still able to choose **Make available offline** and put it into a FileCloud offline folder that will sync with FileCloud.



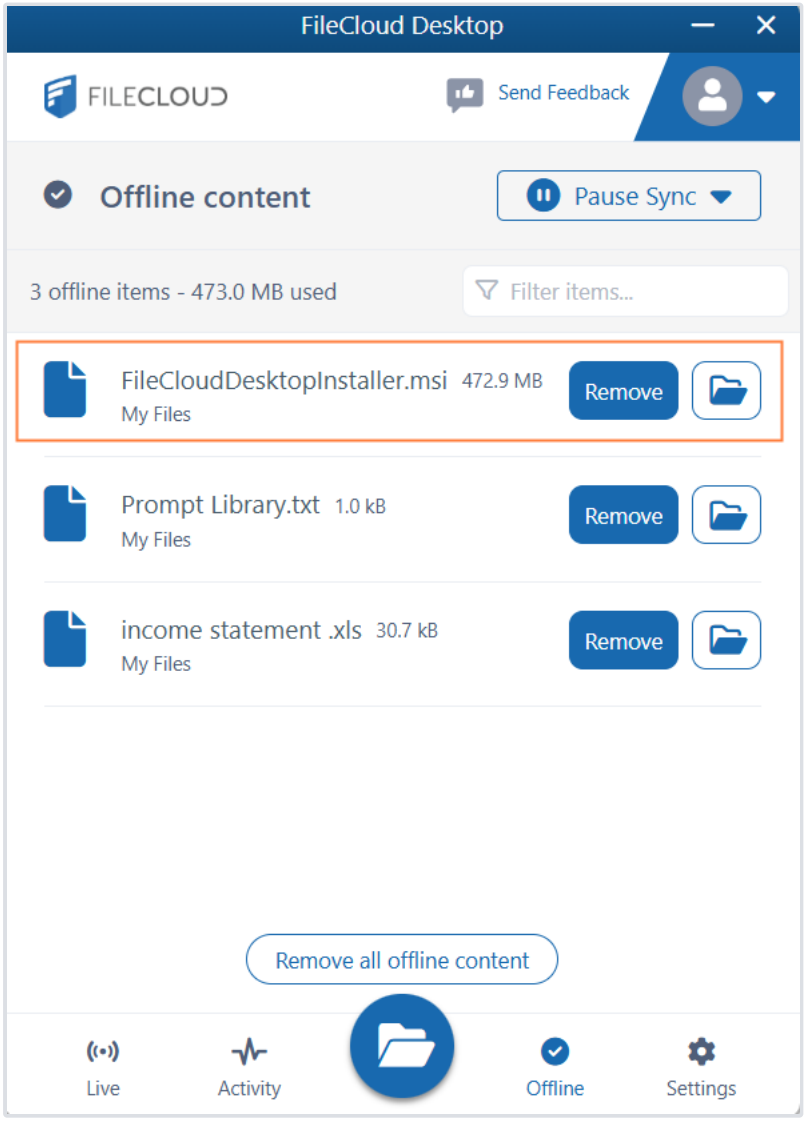
FileCloud Desktop's dashboard shows you the progress of the files being downloaded on the **Live** tab. These disappear as soon as download is complete.



On the **Activity** tab, FileCloud Desktop shows you the download actions for the same files.



The Offline tab shows you files and folders that you have stored offline:

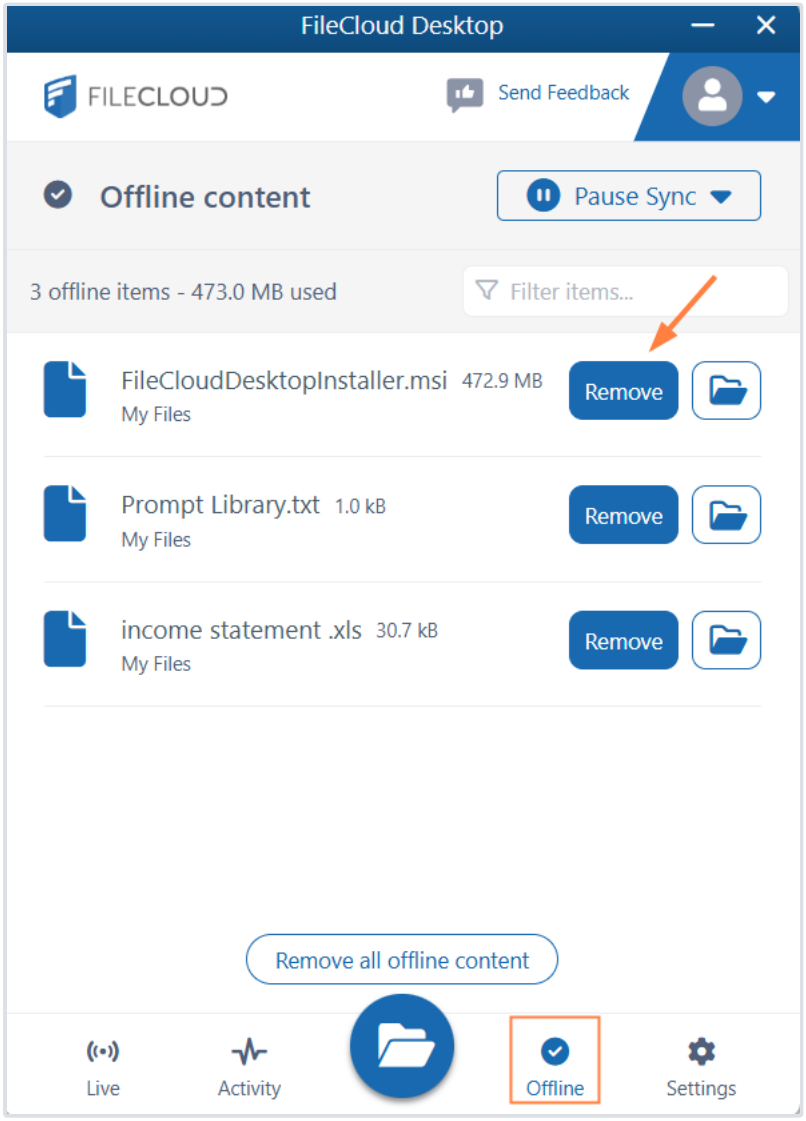


Remove Files and Folders from Offline Folders for FileCloud Desktop for Windows

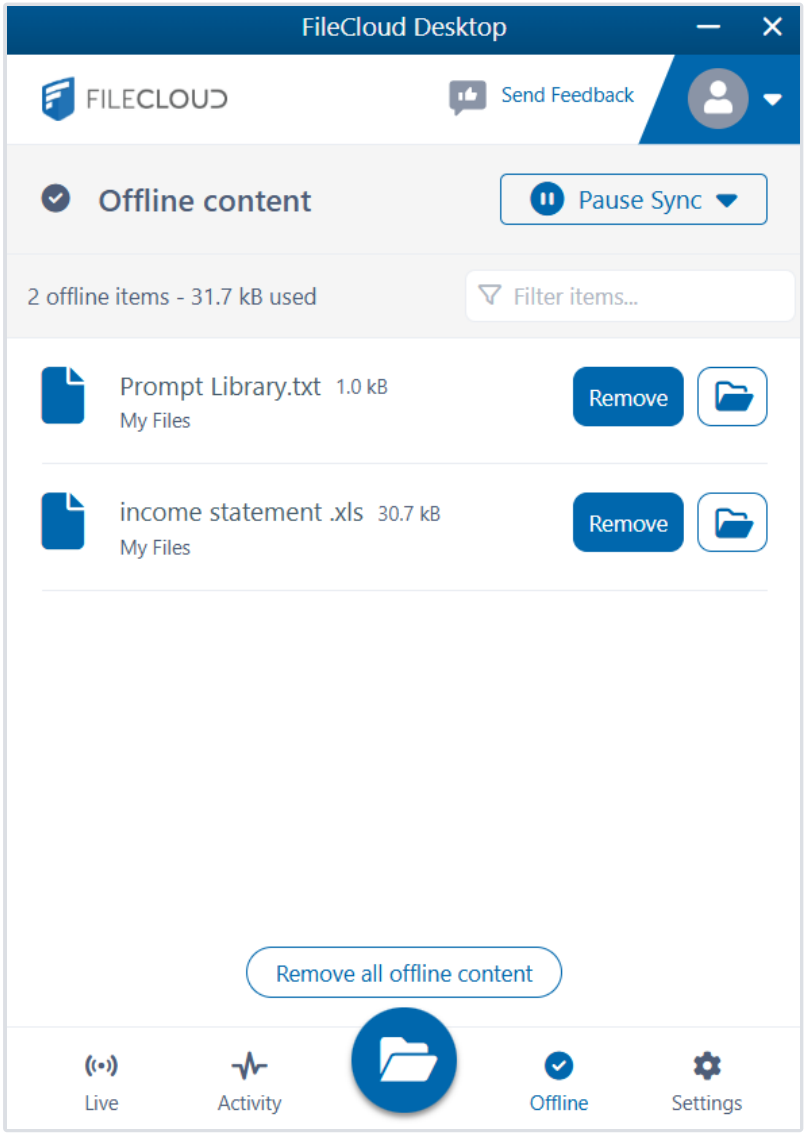
You can remove an offline folder, either through the FileCloud Desktop dashboard or through File Explorer.

To remove an offline folder through the FileCloud Desktop dashboard:

1. In the FileCloud Desktop dashboard, click the **Offline** tab.
2. Click the **Remove** button next to the folder that you want to remove as an offline folder.

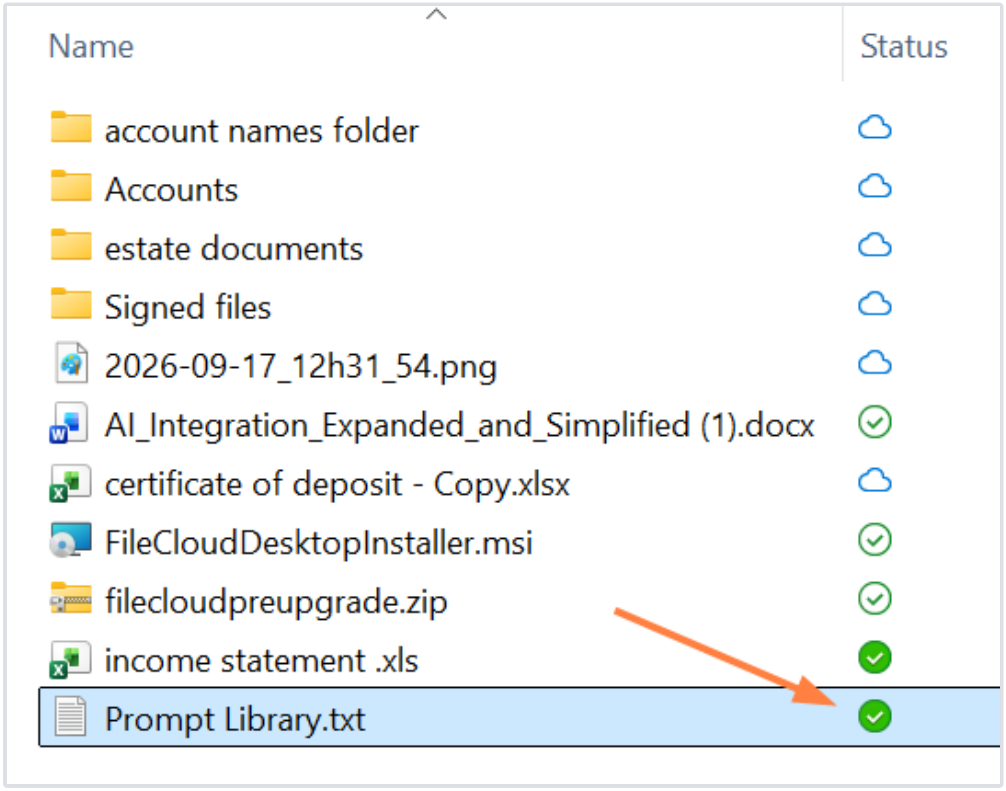


The folder is no longer an offline folder. It no longer appears on the Offline tab of the FileCloud Desktop dashboard and the FileCloud Desktop offline icon no longer appears next to it in the File Explorer.

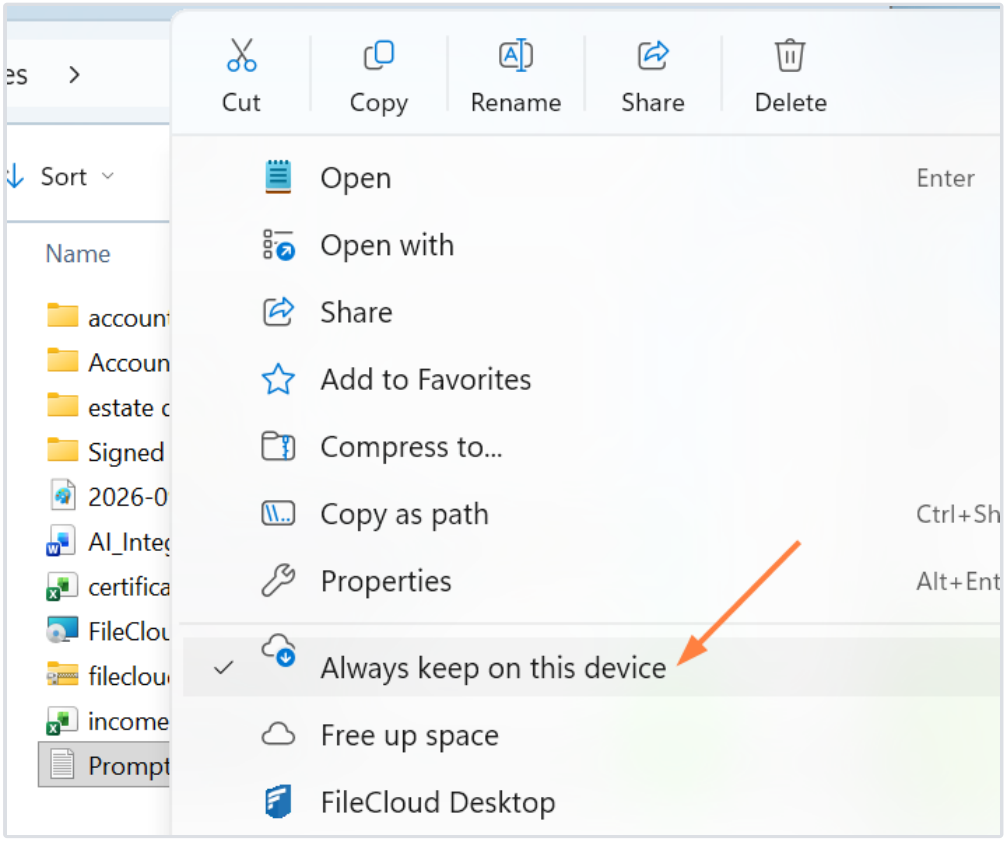


To remove an offline file or folder through Windows explorer:

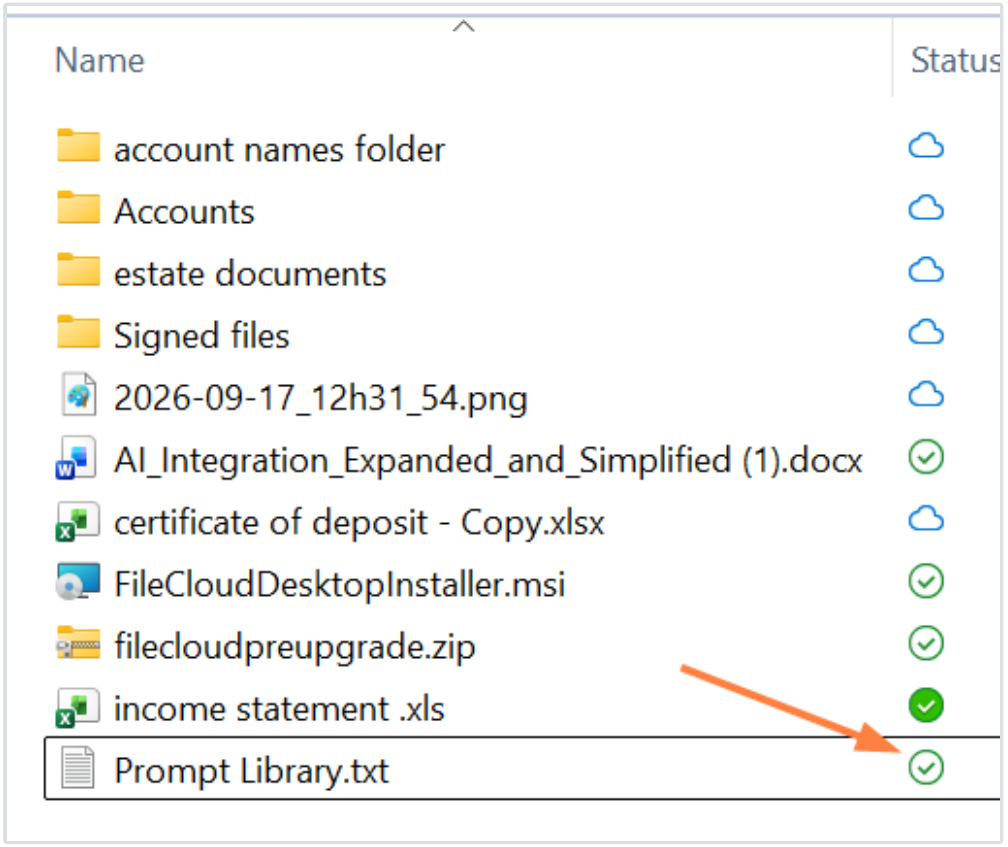
1. In Windows explorer, right-click on the file (it should have a green icon next to it).



2. In the drop-down list, **Always keep on this device** is checked. Click it to remove the check and remove it as an offline folder.



The green circular icon is replaced with a white circular icon, which indicates that the file is still downloaded but not marked for syncing with FileCloud as an offline folder.



The file is also no longer listed on the **Offline** tab of the FileCloud Desktop dashboard.

To free up local space:
When a file or folder is downloaded locally, but not stored as a FileCloud offline file or folder for syncing with FileCloud, you can delete the local version to free up space.

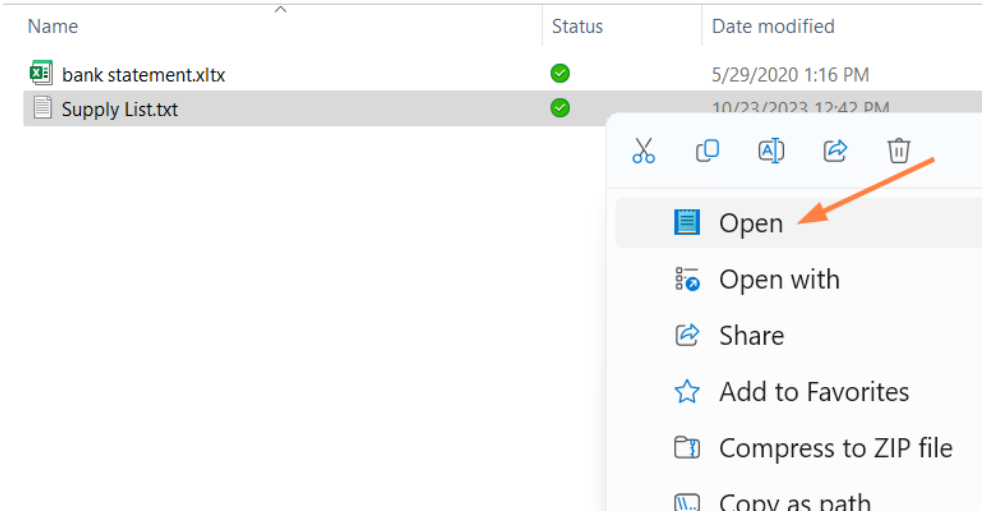
1. In Windows, right-click on a file that is marked with a white circular icon.
2. In the drop-down list, choose **Free up space**.
   The white circular icon is replaced with a cloud icon, which indicates that now the file is only available remotely in FileCloud.

Working with Offline Files from FileCloud Desktop for Windows

After you make files and folders available offline, you can perform any of the regular File Explorer actions on them when you are offline, and the changes are synchronized with the copies in FileCloud when you go back online.

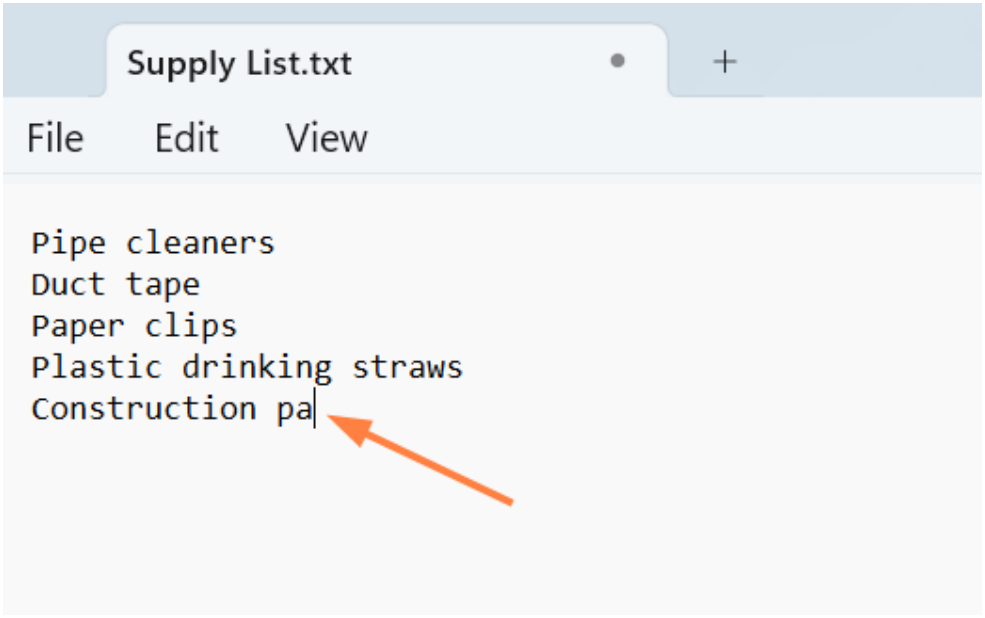
For example, in the following procedure, a downloaded file is edited from file explorer while the user is offline.
When the user goes back online, the **Activities** tab of FileCloud Desktop lists the action as a modification of the file, and the **Live** tab of FileCloud Desktop shows an upload.

1. In Windows explorer, while you are offline, right-click on an offline file (a file with a green circular icon) and choose **Open** or **Open with**.

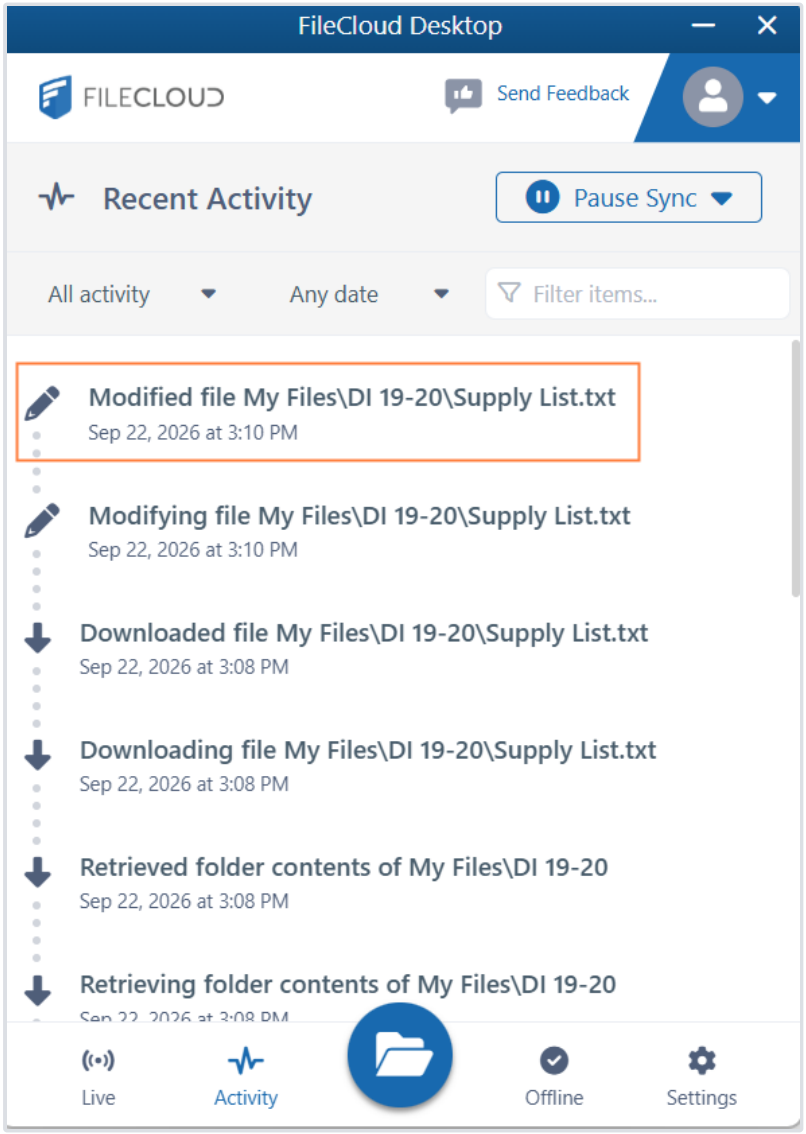


   The file opens in the default or selected application.

2. Make edits to the file.

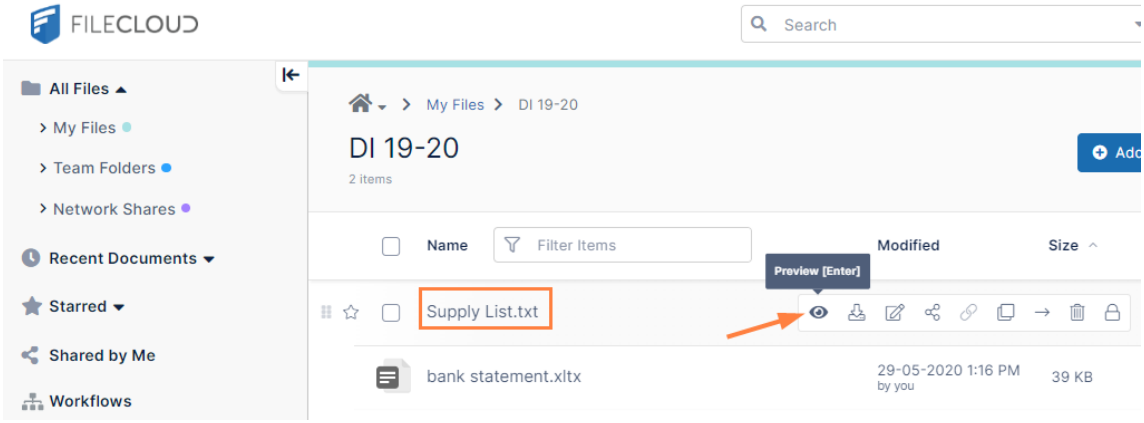


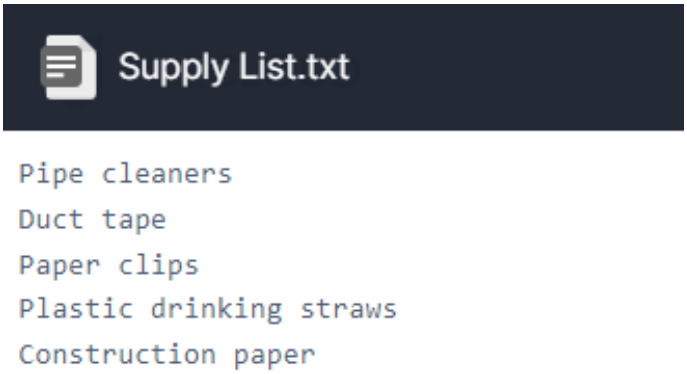
3. Save your edits, and close the file.
4. Go back online.
5. Click the **Activities** tab in FileCloud Desktop.
   The latest activity listing indicates that the file has been modified.



In addition, the modified file is synced with FileCloud (uploaded to FileCloud) and replaces the original file in FileCloud, so that the edited file is now the same offline and online.

6. If you want to confirm that the file has been synchronized, open or preview the file in FileCloud and check its contents.





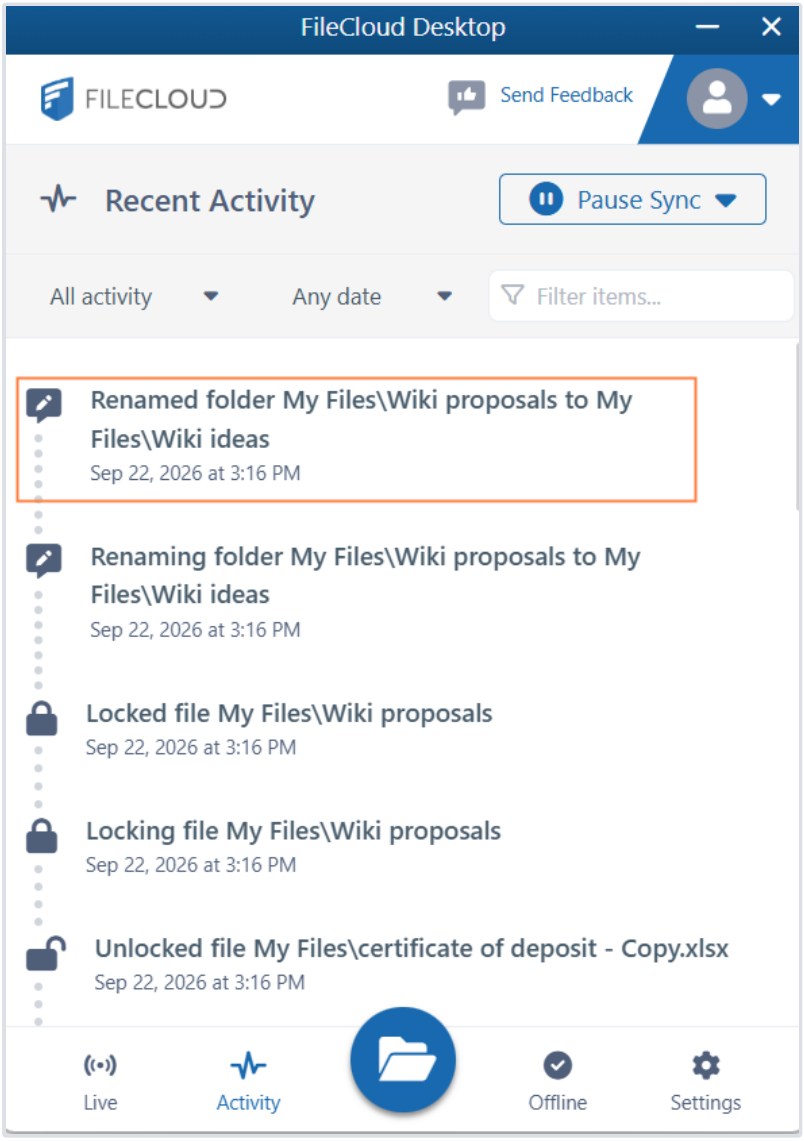
Working with Online Files in FileCloud Desktop for Windows

In the FileCloud Desktop folder in Windows explorer, any file or folder with a cloud next to it is online in FileCloud; when you edit or otherwise modify the file or folder from Windows explorer, you are actually modifying it in FileCloud, and the changes appear immediately in the files in the FileCloud user portal and other clients.

You can see this in the following video, which shows the online FileCloud files in Windows explorer and in the FileCloud user portal side by side. The folder is renamed from **Wiki proposals** to **Wiki ideas** in Windows explorer, and as soon as the user portal is refreshed, the change appears there as well. No sync action is needed.https://www.youtube.com/embed/ipun78UnVNc?si=iwHZMJg1VWGbwUDd



In the **Activity** tab of the FileCloud Desktop dashboard, you can see action for renaming the folder **Wiki proposals** to **Wiki ideas**:



The same is true if you edit, delete, create, or copy a file in either interface. It appears almost immediately on the other. (You can check the **Activity** tab to monitor when syncing has occurred.) The following example shows how a file created in the FileCloud user portal automatically appears in the online folder in Windows explorer:



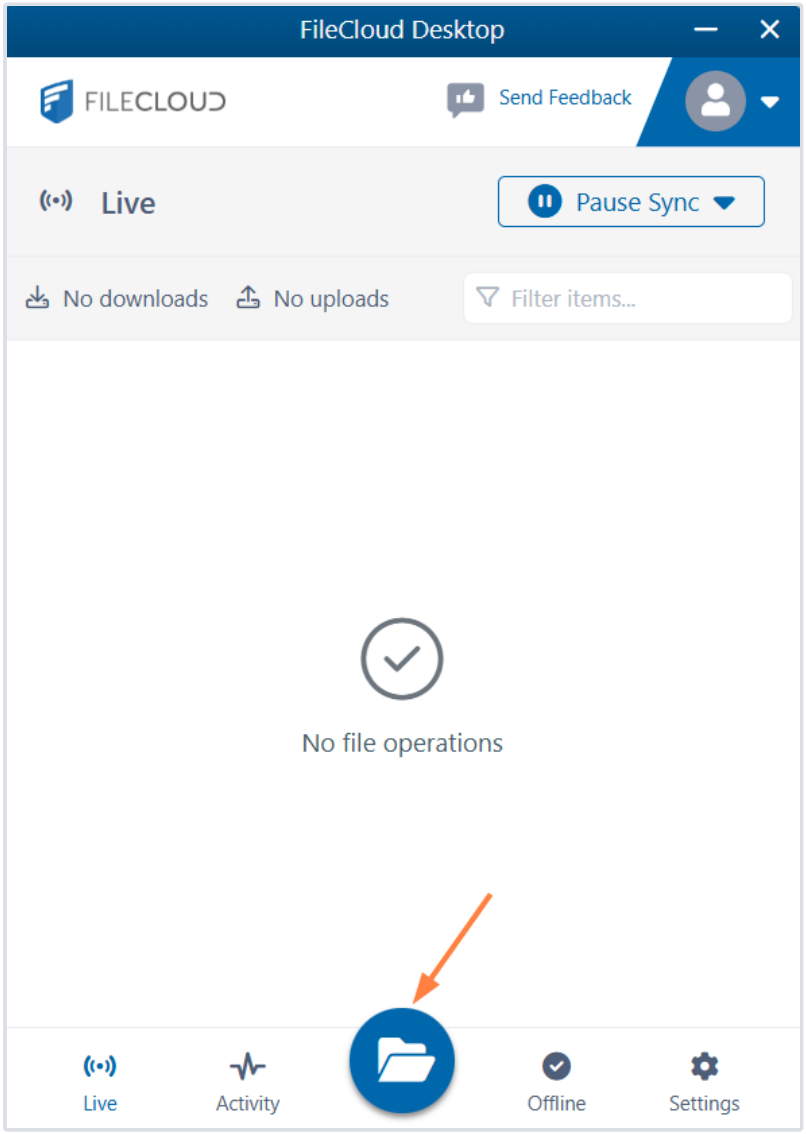
Sharing

Files and Folders in FileCloud Desktop for Windows

You can share a file or folder in FileCloud from the FileCloud Desktop for Windows folder in File Explorer.

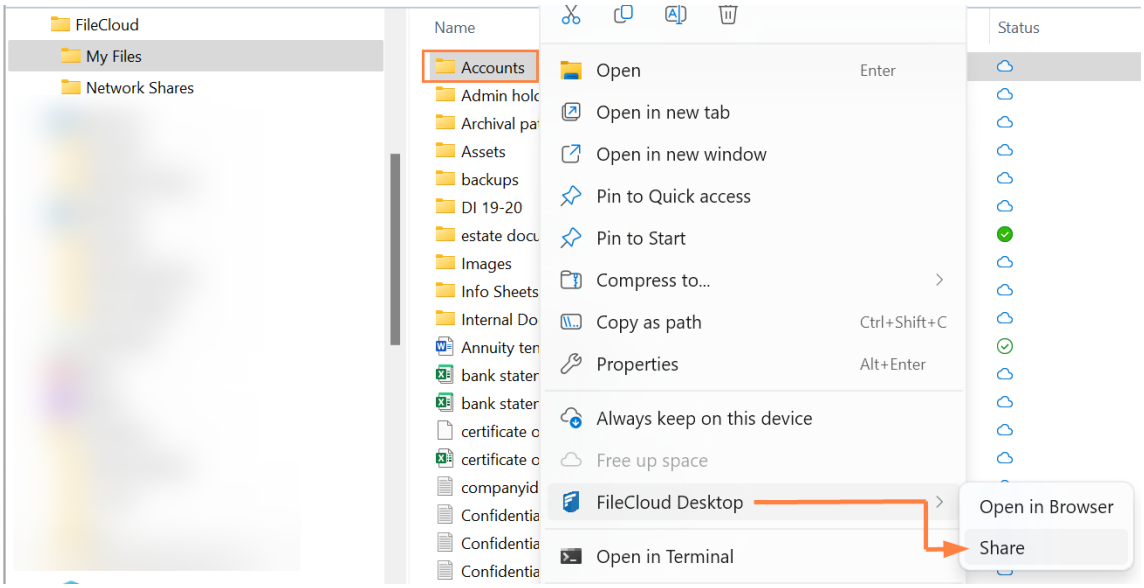
To share a file or folder:

1. In the FileCloud Desktop dashboard, click the folder icon.

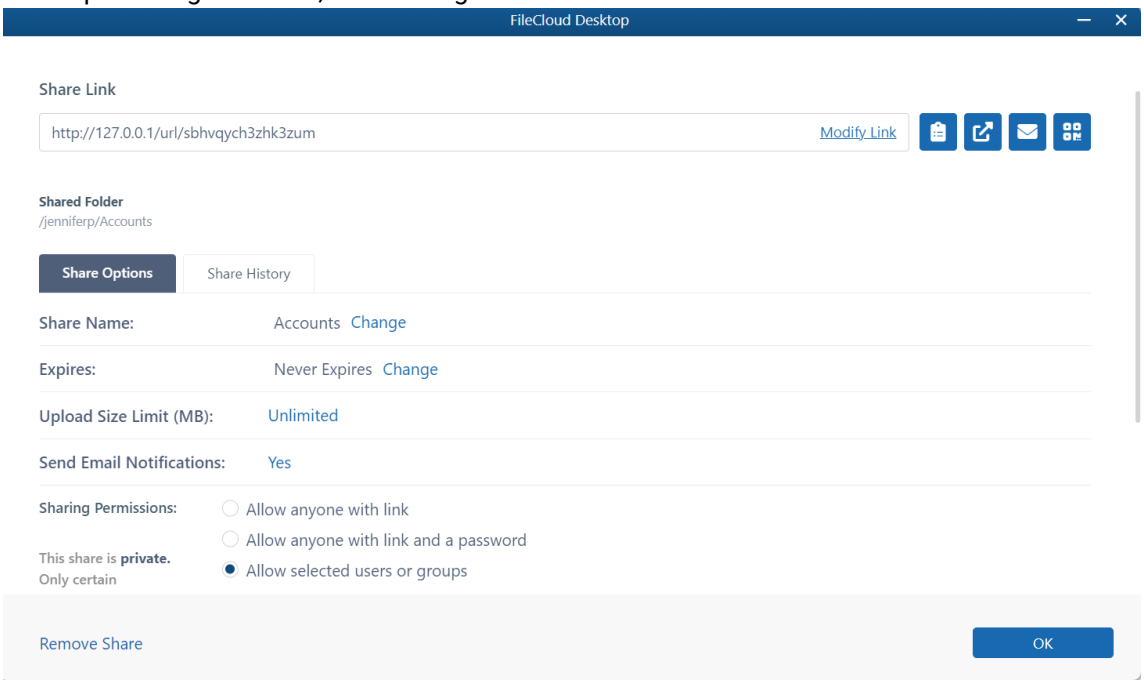


File Explorer opens to the FileCloud folder that you are logged in to in FileCloud Desktop.

2. Navigate to the file or folder that you want to share and right-click it.
3. In the menu, choose **FileCloud Desktop > Share**.
   Note: On Windows Server 2019 this option is not supported.



A FileCloud **Share Link** dialog box opens.
For help creating the share, see Sharing Files and Folders.



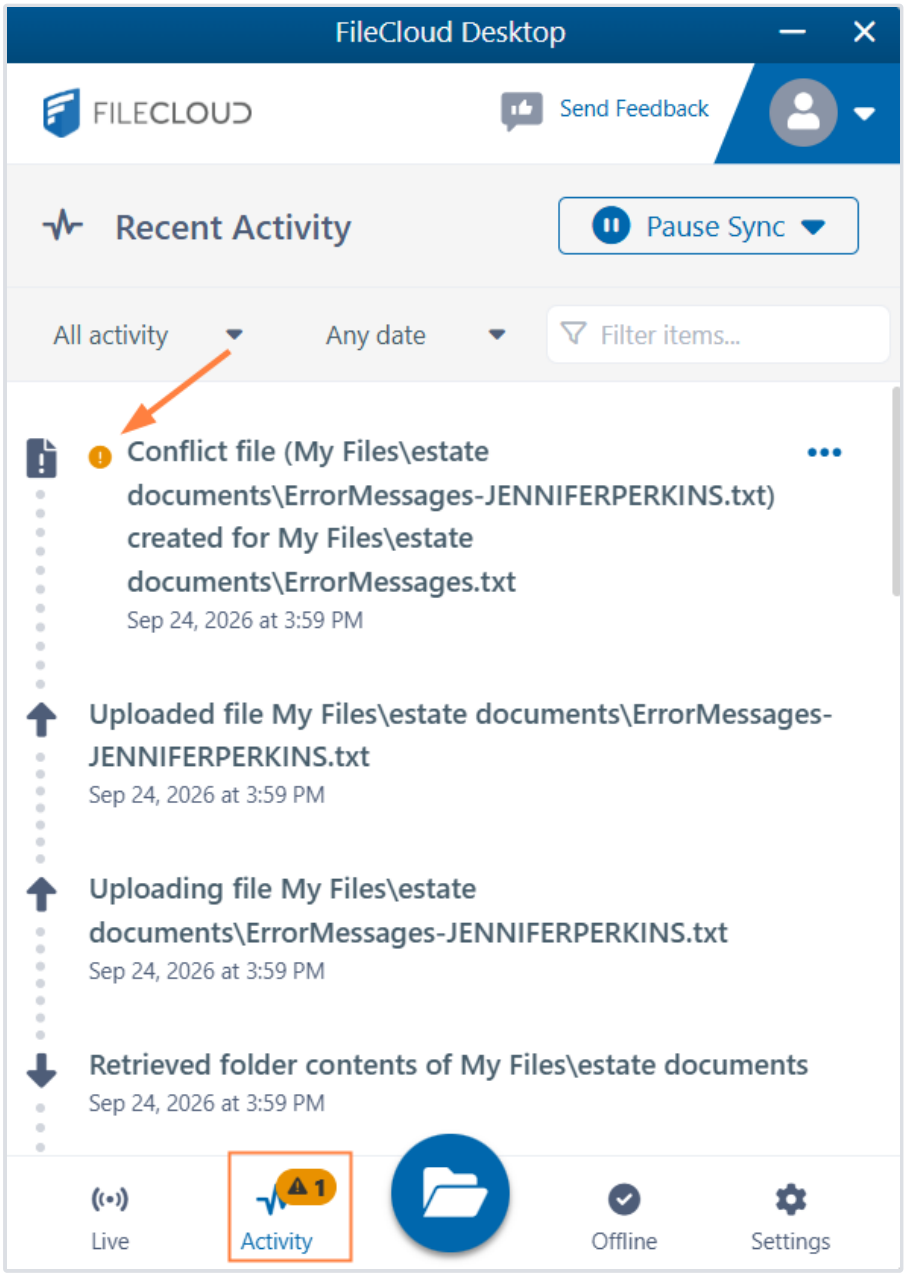
How FileCloud Desktop for Windows handles change conflicts

File conflict occurs when FileCloud Desktop for Windows cannot determine which copy of a file is the most recent.

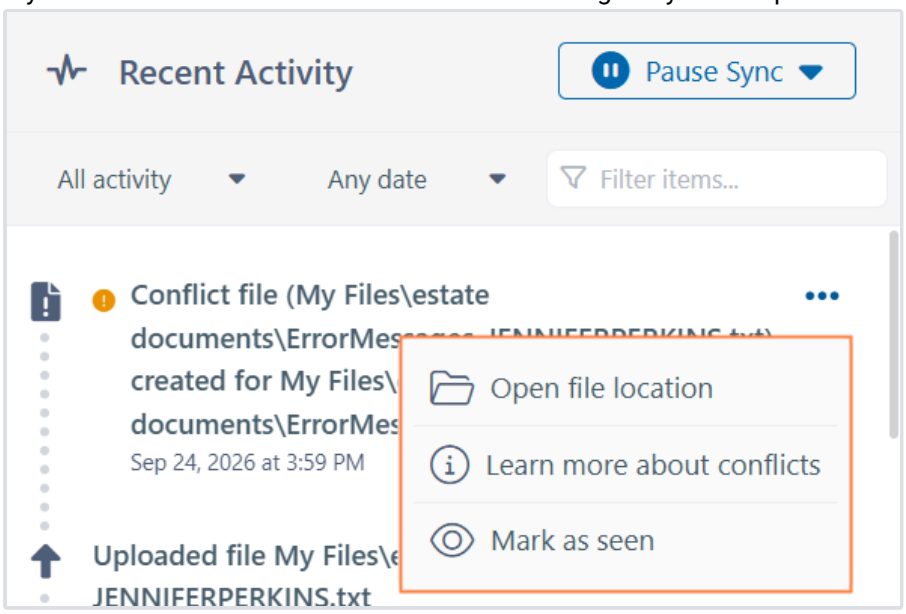
How to know there is a conflict

FileCloud Desktop indicates that there is a conflict in the following ways:

- The user whose action has caused a conflict receives an email with information about the conflict.
- The Recent Activity dashboard screen shows a warning icon beside the action and indicates **Modifying the file [filename] ended in a conflict**. In addition, the Activity tab at the bottom of the dashboard is overlaid with a warning icon that indicates the number of conflicts:

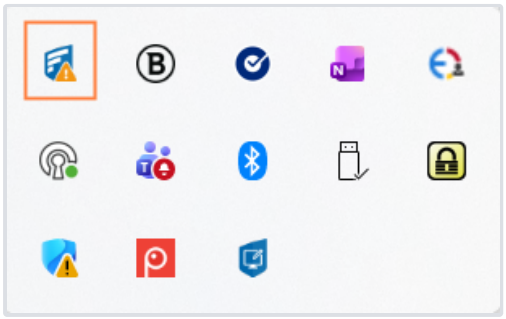


If you click the more icon next to the conflict file it gives you the options:

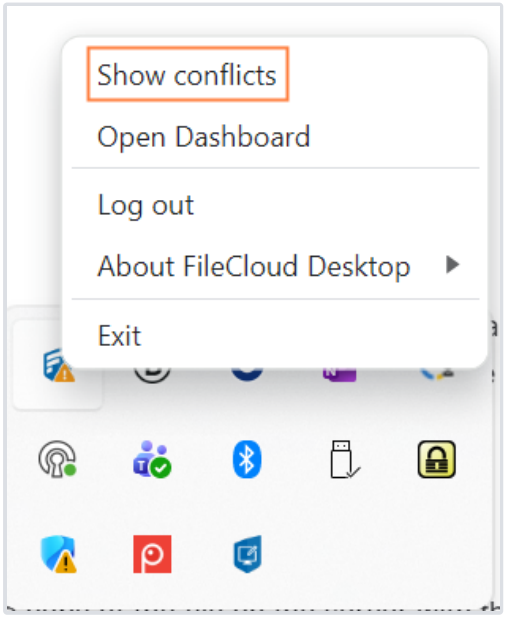


Open file location - Takes you to the folder storing the file in the FileCloud Desktop root in Windows Explorer. The original file (not the conflict file) is highlighted.
Learn more about conflicts - Takes you to the current help page.
Mark as seen - Removes the conflict from your Recent Activity screen, but maintains the conflict file so you may resolve the conflict later.

- In the desktop tray, the FileCloud Desktop icon is overlaid with a warning icon:



- Right-clicking on the desktop tray icon shows the option **Show conflicts**. Clicking on it takes you to the Recent Activity screen in the dashboard where the conflict is listed.



What causes a conflict

It can arise under the following conditions:

- When two users save the same file at approximately the same time.
- When one user is editing a file offline, and the file is modified by another user in FileCloud. When the person who was offline comes back online and FileCloud Desktop tries to upload the edited version to the server, it detects that there is a new version available.

FileCloud's resolution: the conflict file

- **If the conflict files have been edited by two different users**:
  FileCloud Desktop for Windows automatically resolves the conflict by saving the copy of the file on the server with the original filename, and saving the local copy of the file with the name **[filename]-[username].[ext]**. Both files are saved locally in FileCloud.
- **If the conflict files have been edited by the same user**:
  FileCloud Desktop for Windows automatically resolves the conflict by saving the copy of the file on the server with the original filename, and saving the local copy of the file with the name **[filename]-[machine name].[ext]**. Both files are saved locally in FileCloud.

Conflict information continues to be shown each time the user launches the app until the user resolves or dismisses the conflict or logs out.

Mass Deployment Configuration for FileCloud Desktop for Windows

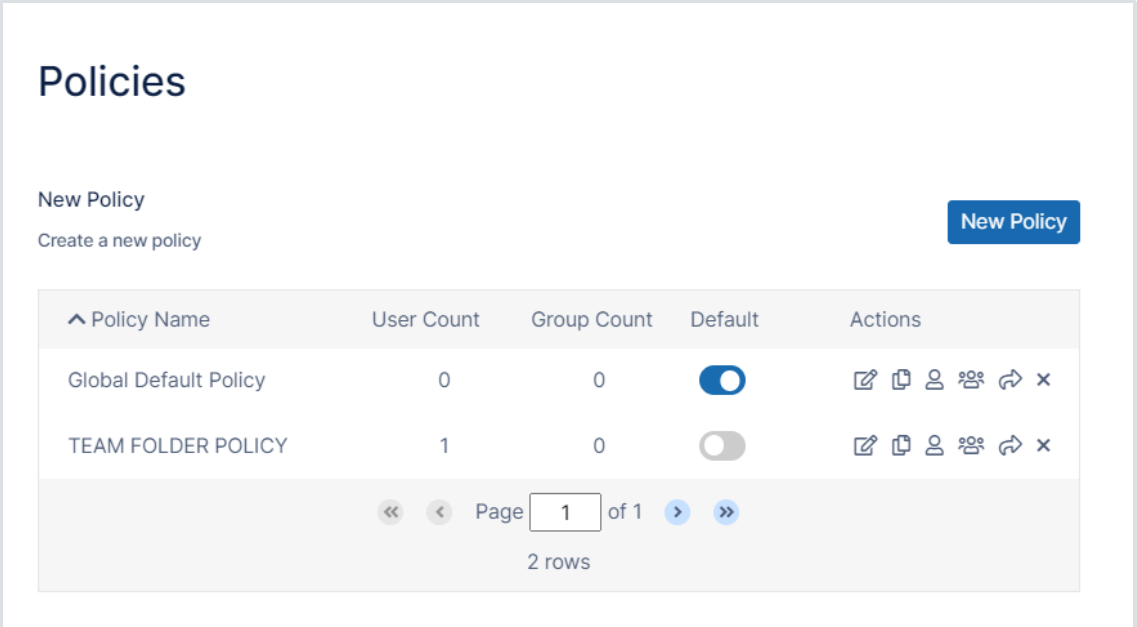
You can configure mass deployment settings for FileCloud Desktop for Windows through Remote client management (RMC).

To configure mass deployment settings through RMC

You can configure client device settings for FileCloud Desktop for Windows remotely by specifying the configuration XML in the **Device Configuration** tab of FileCloud policies.

For most clients, if the user changes the configuration locally, then the remote settings configured by the Administrator will override those settings the next time the client refreshes its settings.

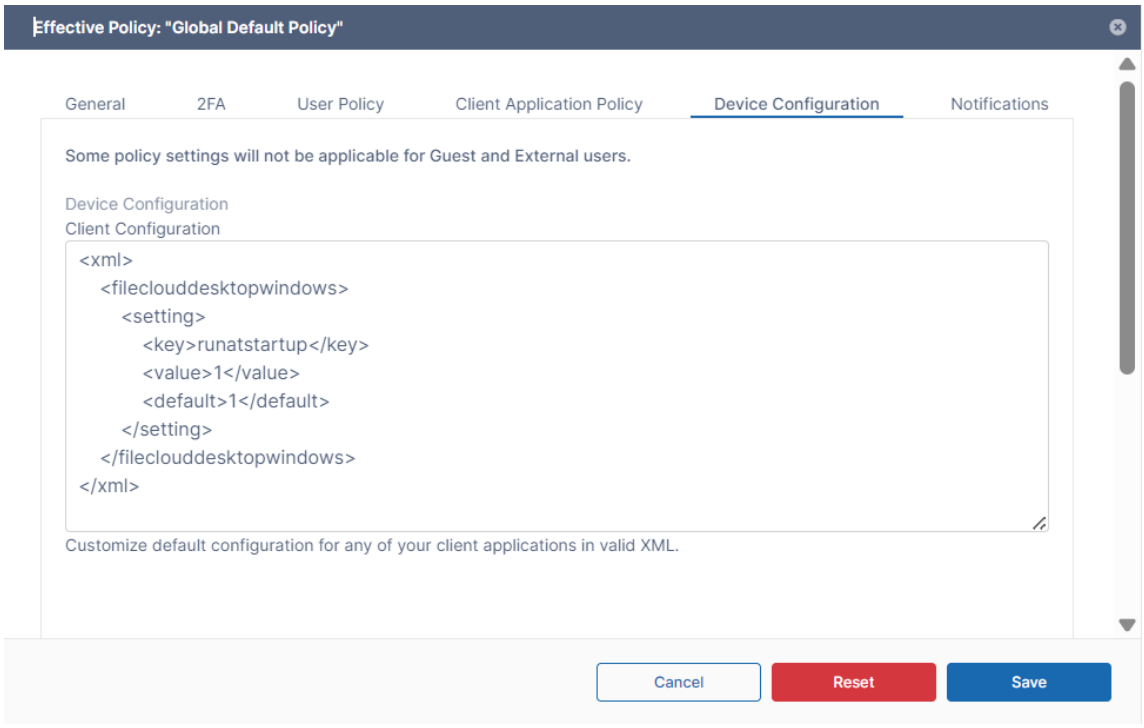
1. In the FileCloud admin portal's left navigation bar, scroll down and click **Settings**. Then, on the **Settings** navigation page, click **Policies** .
   The **Policies** settings page opens.



2. Edit the policy of the users whose client device settings you want to modify.
3. Click the **Device Configuration** tab.
4. Paste or type in the remote device configuration XML in **Device Configuration** using any number of parameters from the table below.

```
<xml>
    <filecloudesktopwindows>
        <setting>
            <key>runatstartup</key>
            <value>1</value>
```

```
            <default>1</default>
        </setting>
    </fileclouddesktopwindows>
</xml>
```



<default> is an optional tag that indicates if the setting can be changed through the user interface.
A value of 1 indicates the setting is a default and can be changed by the user through the user interface.
A value of 0 (or omission of <default>) indicates that the setting is overridden and cannot be changed by the user through the user interface.

Supported parameters for FileCloud Desktop for Windows. All parameters are optional. Add one of more of these parameters (using <key>, <value>, and <default> tags) in the <setting> tags in the XML.

Key	Description	Values
runatstartup	Run FileCloud Desktop for Windows on system startup.	0 (disabled) 1 (enabled) default
loglevel	Level of details stored in log files, where **information** is the least detailed, and **trace** is the most detailed.	"information" default "debug" "trace"

<table>
<tr>
<td>language</td>
<td>Language of the FileCloud Desktop for Windows user interface.</td>
<td>
<table>
<tr><th>Value</th><th>Language</th></tr>
<tr><td>nl</td><td>Dutch</td></tr>
<tr><td>en (default)</td><td>English</td></tr>
<tr><td>de</td><td>German</td></tr>
<tr><td>es</td><td>Spanish</td></tr>
<tr><td>pt</td><td>Portuguese</td></tr>
<tr><td>fr</td><td>French</td></tr>
<tr><td>ar</td><td>Arabic</td></tr>
<tr><td>it</td><td>Italian</td></tr>
<tr><td>ru</td><td>Russian</td></tr>
</table>
</td>
</tr>
<tr>
<td>mutenotifications</td>
<td>Suppress all notifications on FileCloud Desktop.</td>
<td>0 (disabled, notifications are shown) default
1 (enabled, notifications are not shown)</td>
</tr>
</table>

Example:

The code below shows example settings:

```
<xml>
<filecloudesktopwindows>
  <setting>
    <key>runatstartup</key>
    <value>1</value>
    <default>1</default>
  </setting>
  <setting>
    <key>loglevel</key>
    <value>debug</value>
  </setting>
  <setting>
    <key>language</key>
    <value>en</value>
```

```
  </setting>
  <setting>
    <key>mutenotifications</key>
    <value>0</value>
  </setting>
</fileclouddesktopwindows>
</xml>
```

In this example:

- The application runs at startup (runatstartup = 1, default = 1). Default value.
- The log level is set to "debug" (loglevel = debug). Overridden value.
- The language is set to "en" (language = en). Default value.
- Notifications are not muted (mutenotifications = 0). Default value.

If a key is not supported or a value is incorrect, the application skips it and logs a warning message.

Precedence of settings

Settings take precedence in the following order, from lowest to highest:

1. RMC default
2. User preferences
3. Override RMC settings

Using FileCloud for Office with FileCloud Desktop for Windows

FileCloud for Office is an MS Office add-in for Word, Excel, and PowerPoint which can be used in both Windows and macOS with FileCloud Sync, FileCloud Drive, and FileCloud Desktop. It is available in FileCloud beginning with version 23.1.
For instructions on how to install FileCloud for Office, see Using FileCloud for Office.

If a user is viewing details of an auto-locked file in FileCloud for Office and clicks refresh, the file may be unlocked. To avoid confusion, we recommended that users do not use FileCloud for Office when auto-locking is enabled.

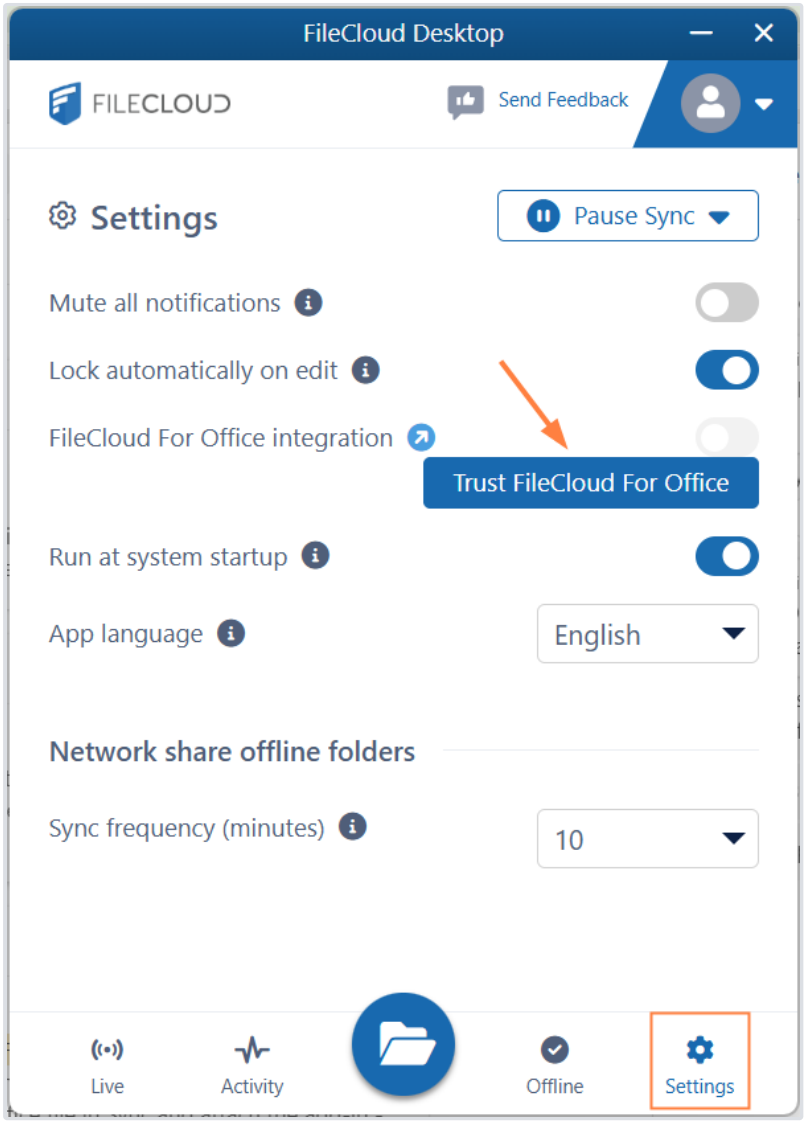
Before using FileCloud for Office with FileCloud Desktop for Windows

The first time you install FileCloud Desktop for Windows, you must:

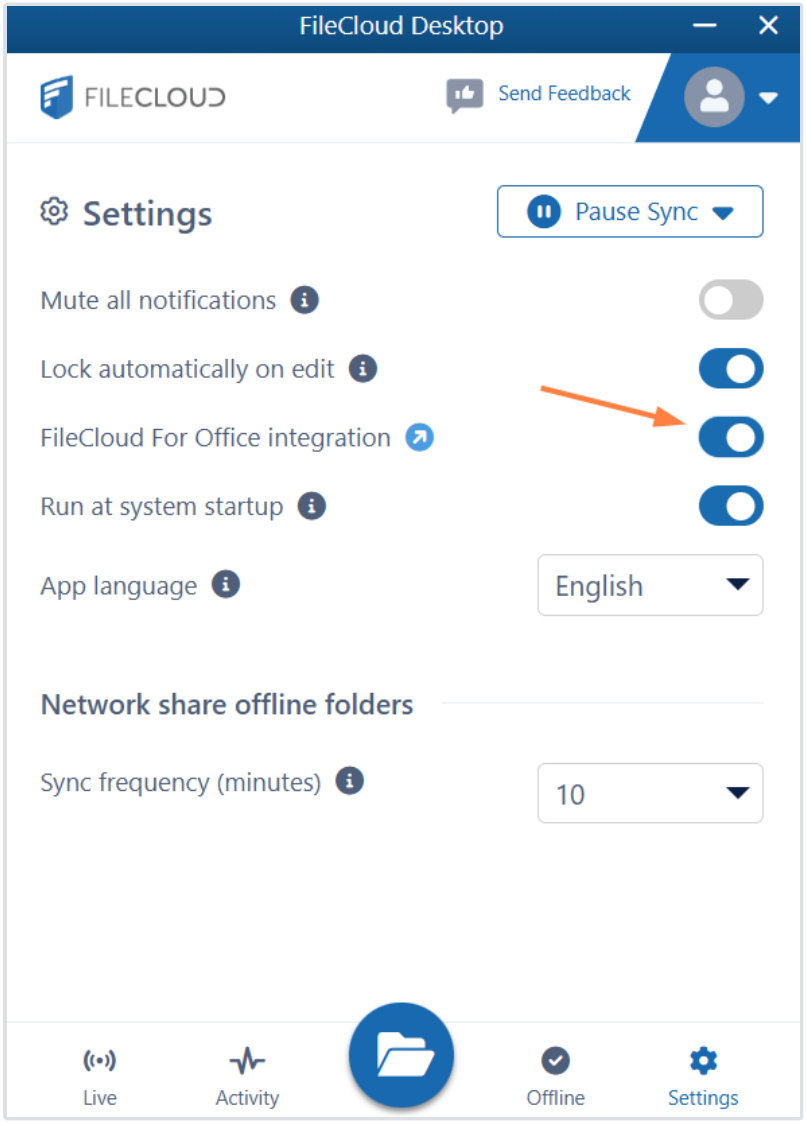
- Confirm that you trust FileCloud for Office and enable it as shown in the following procedure.

To confirm that you trust FileCloud for Office and enable it:

1. After you log in to FileCloud Desktop for Windows, click the **Settings** tab.
2. Then, click the **Trust FileCloud for Office** button.



The **Trust FileCloud for Office** button disappears, and the slider for **FileCloud For Office integration** becomes accessible, and is enabled by default. Leave enabled to be able to use FileCloud for Office.



FileCloud for Office is now enabled, but to use it in Office files, you must attach the add-in to each type of Office file from your FileCloud Desktop directory.

Working with FileCloud for Office in FileCloud Desktop for Windows

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

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

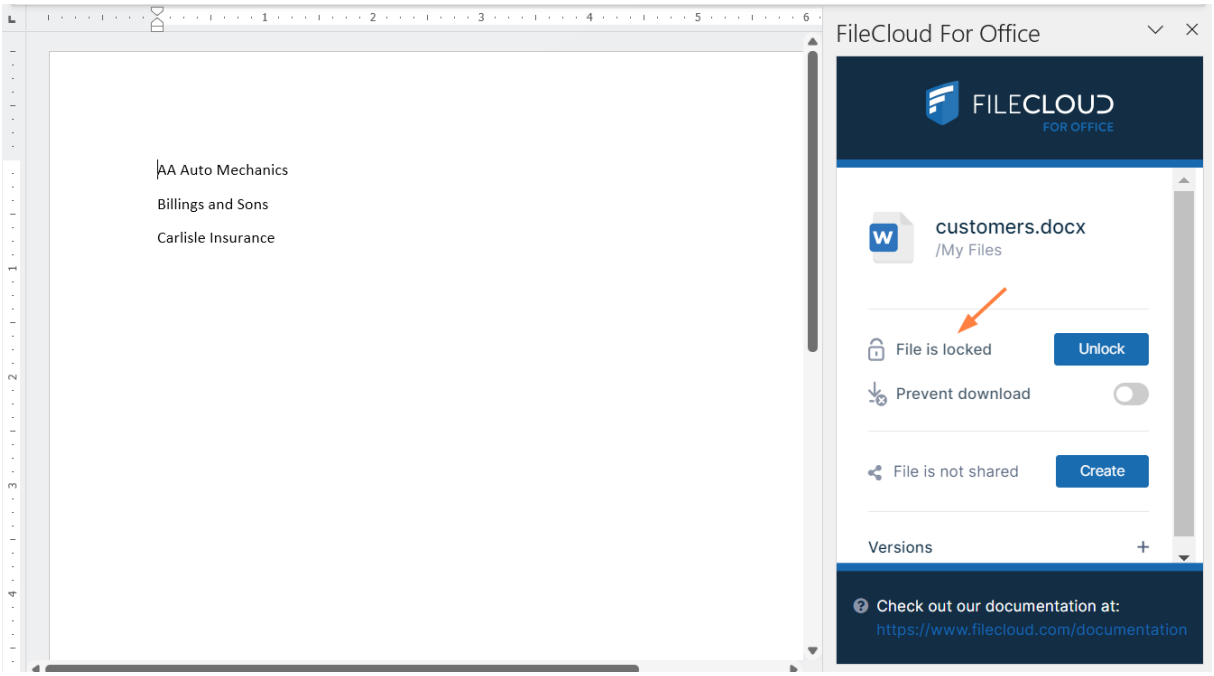
Lock or unlock a file

Locking and unlocking files

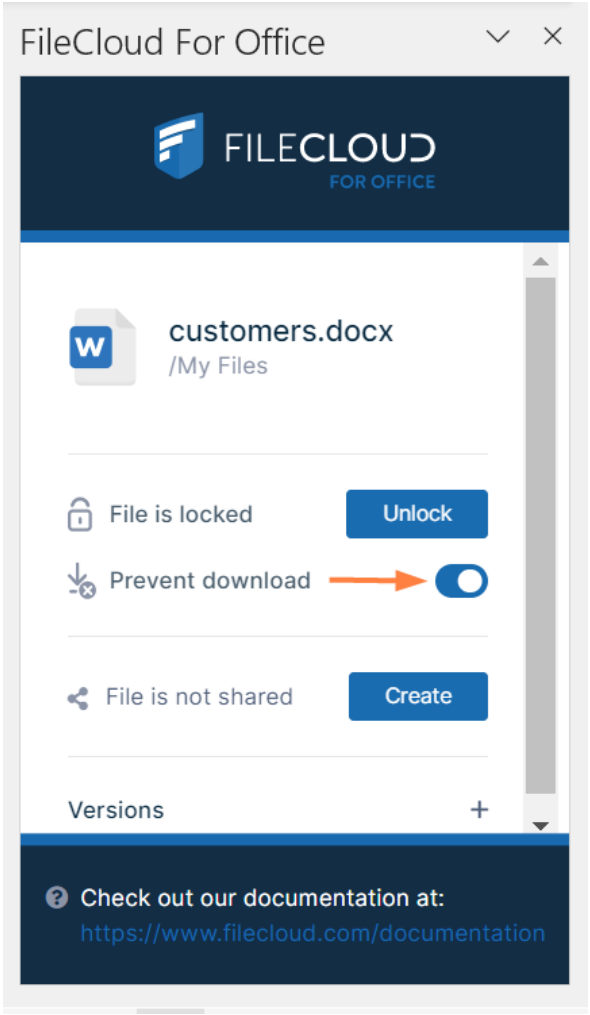
You can use the file locking function in FileCloud for Office to:

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

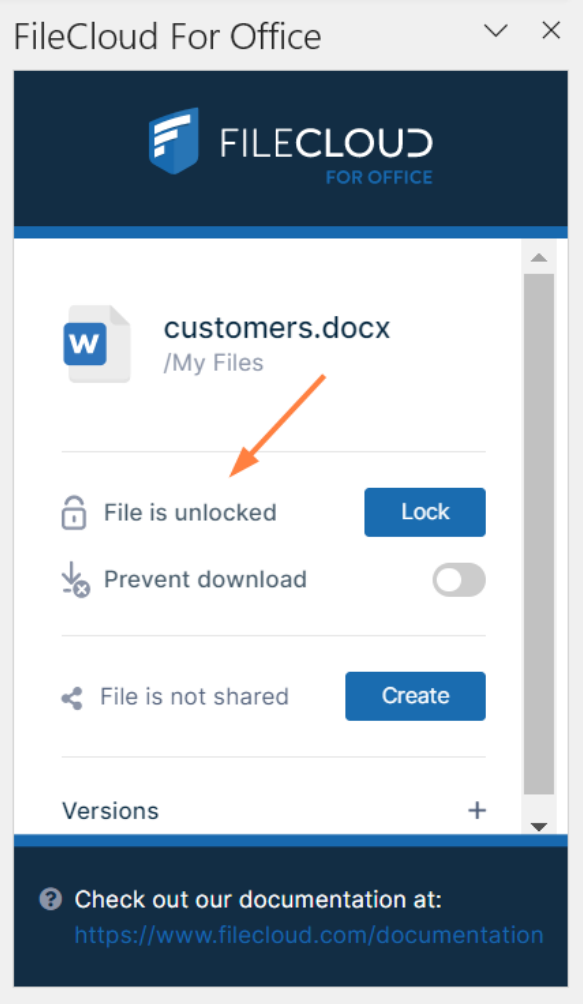
If a shared file is not locked when you open it for edit, another user can also open the file and make changes.
To avoid this, by default, FileCloud for Office automatically locks files for editing when they are opened.
When you open an Office file in your client directory, the FileCloud for Office panel shows **File is locked**, and by default, users are allowed to download or read the file (**Prevent download** is disabled).



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



- To unlock the file while you have it opened for edit, click **Unlock**. Now other users can modify as well as view and download the file.
  Note: Prevent download cannot be enabled when the file is unlocked.



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

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

For a locked file with download (read) prevented:
If USER1 has locked (and read blocked) the file:

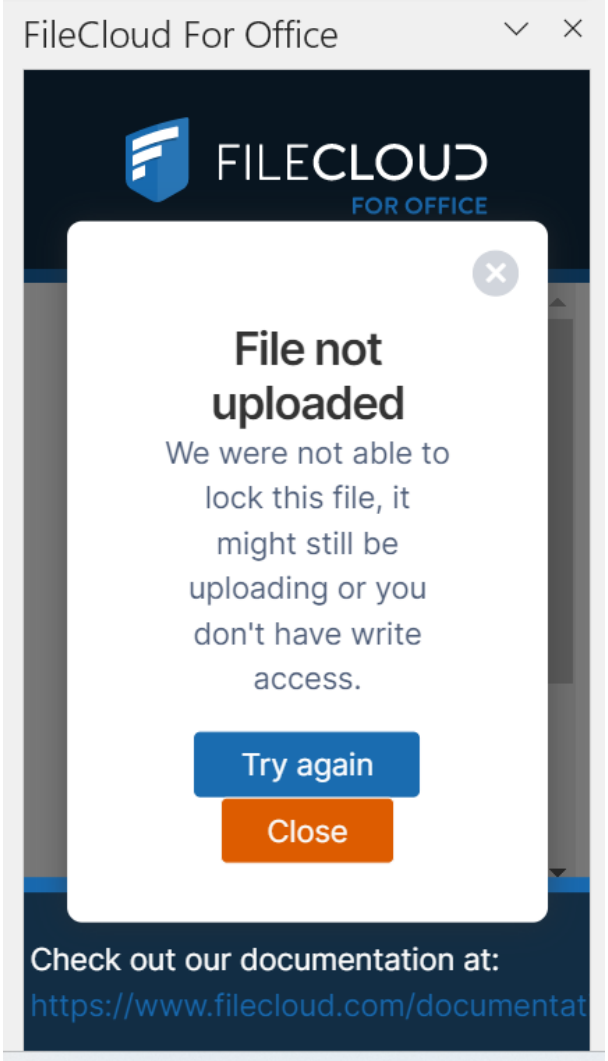
- The FileCloud client will not download the file for USER2

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

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

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

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



If you are an admin and want to disable locking, see Managing User Locks.

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

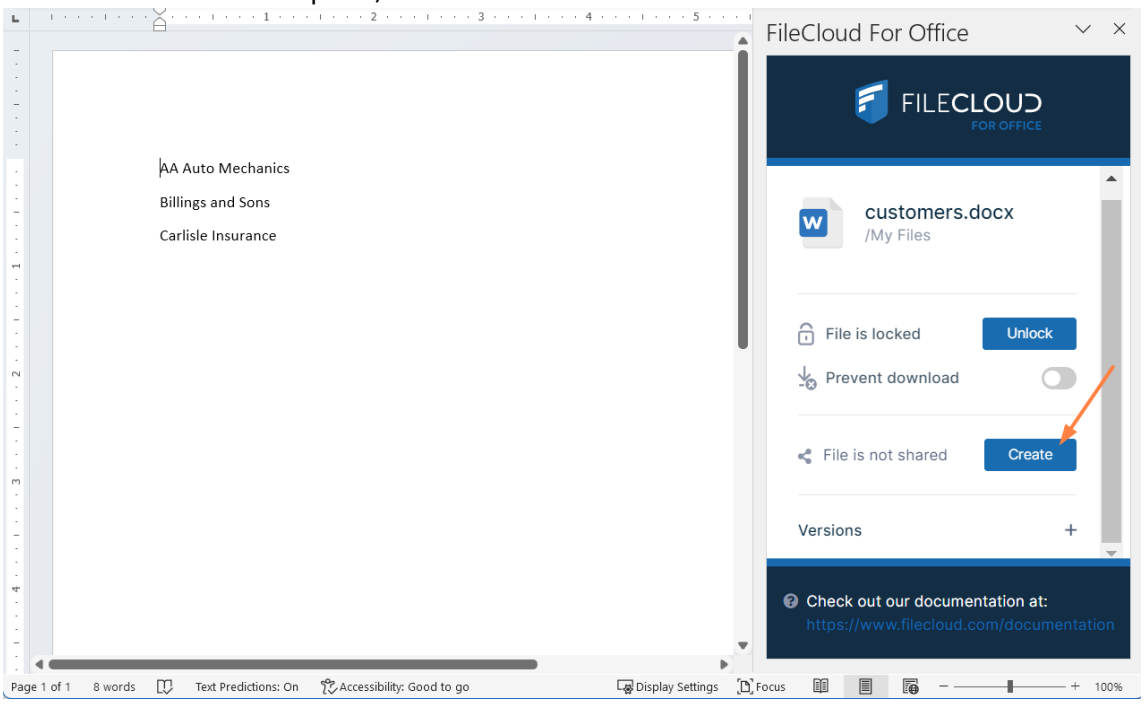
Action	Doc IQ Lock Enabled	Prevent Download	Lock Status Before Open	Lock Status After Open	Lock Status After close
An unlocked file is opened by USER1	☑	☒	File is not locked	File is locked (read allowed) by USER1	File is not locked
An unlocked file is opened by USER1	☒	☒	File is not locked	File is not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

Share a file

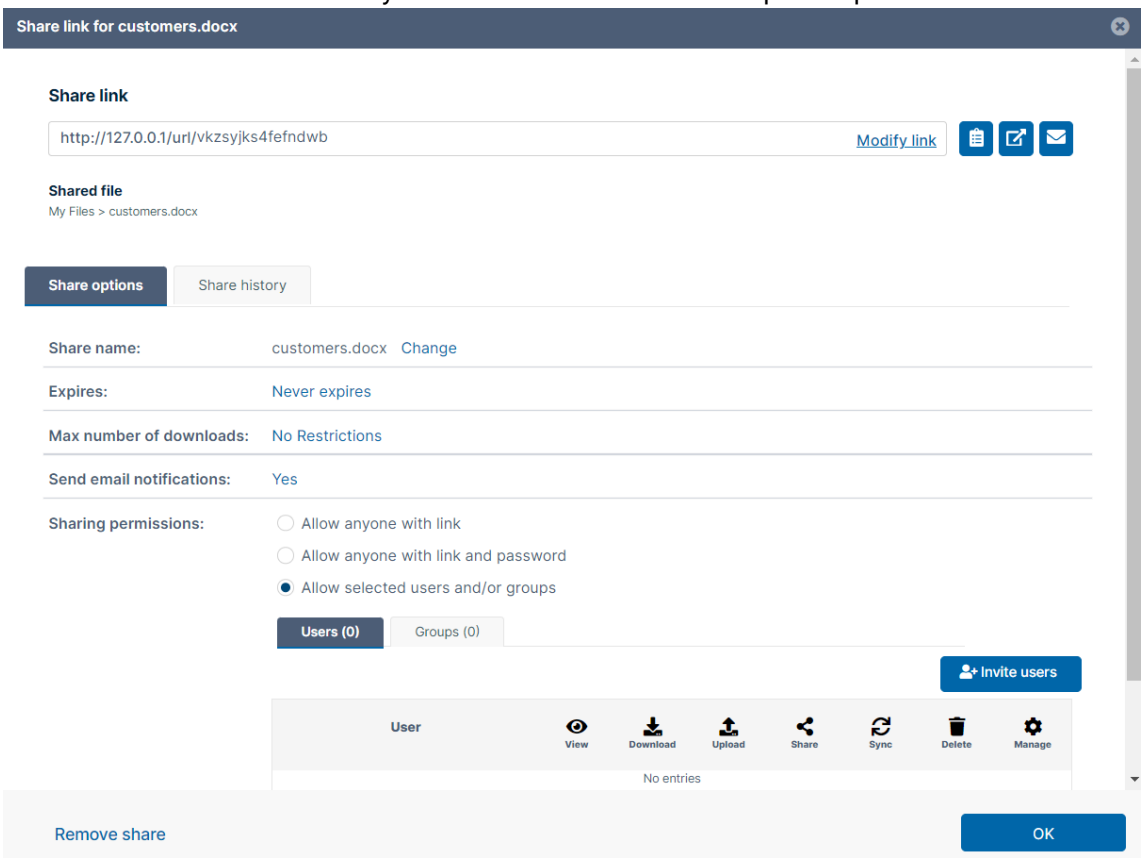
Sharing a file

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

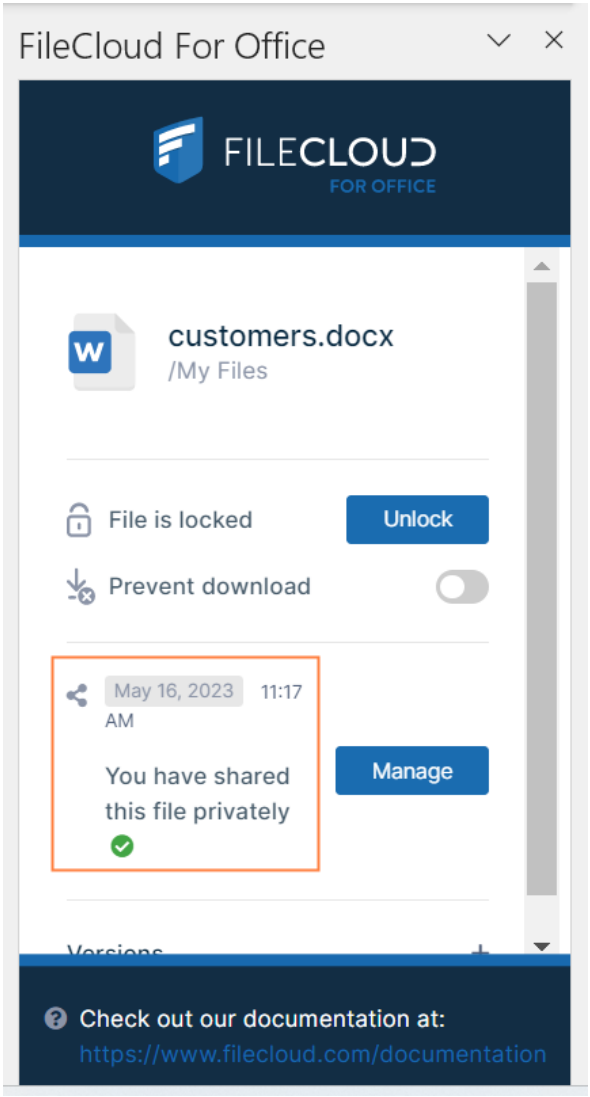
1. In the FileCloud for Office panel, click **Create**.



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



2. Share the file using the same settings and options that you would for a share in the user portal. See Sharing Files and Folders for help.
   Note: The option for downloading the share QR code, which is available for shares created from the user portal, is not available for shares created in FileCloud for Office.
   After you have shared the file, the FileCloud for Office panel displays details of the share:



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

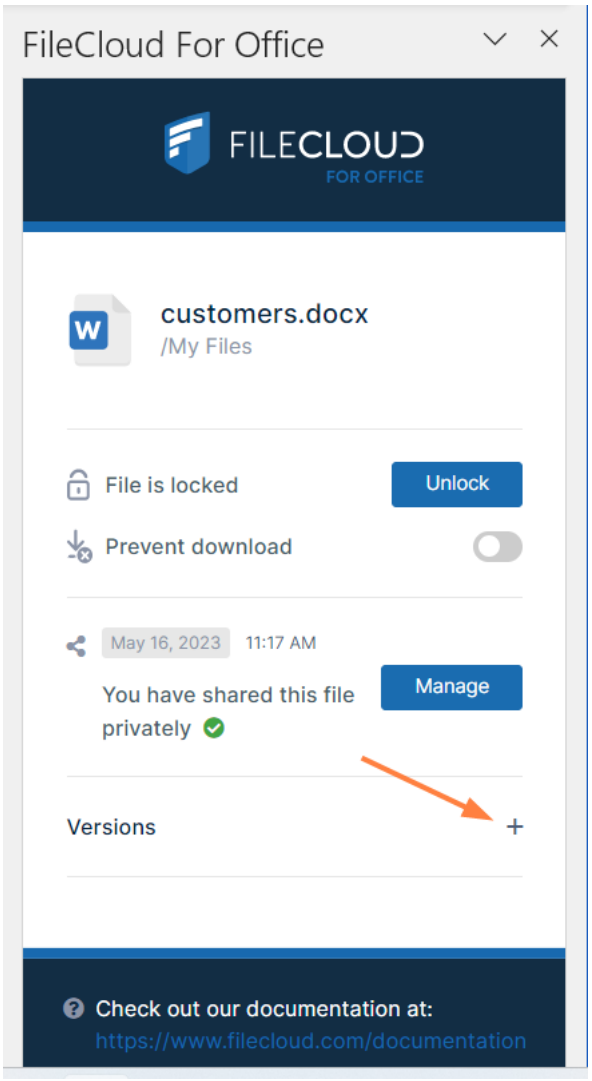
Download versions, view details and metadata

Downloading versions, viewing details, viewing metadata

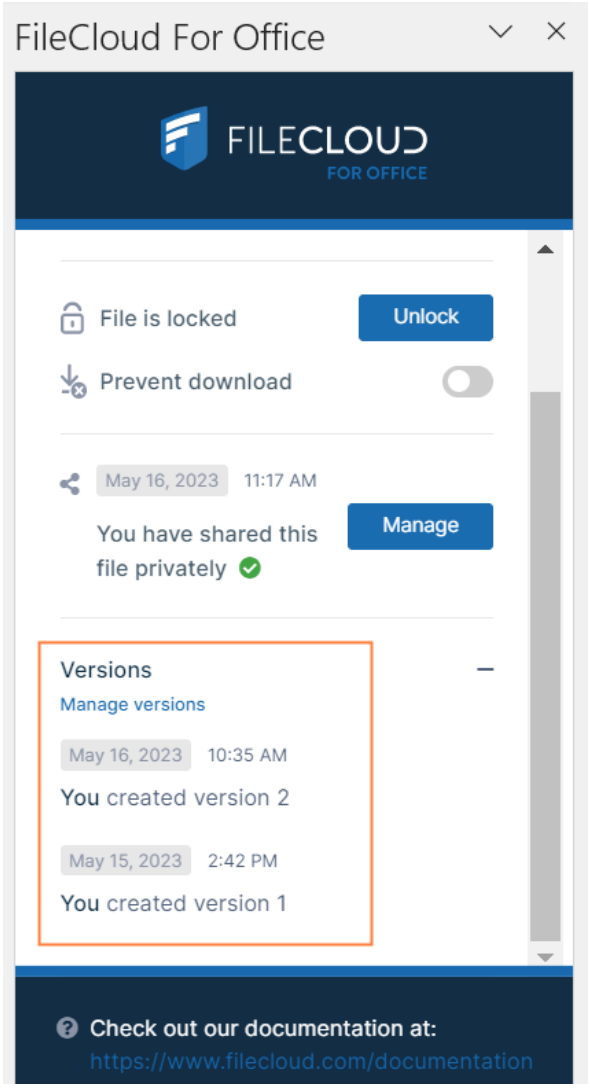
Versions

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

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

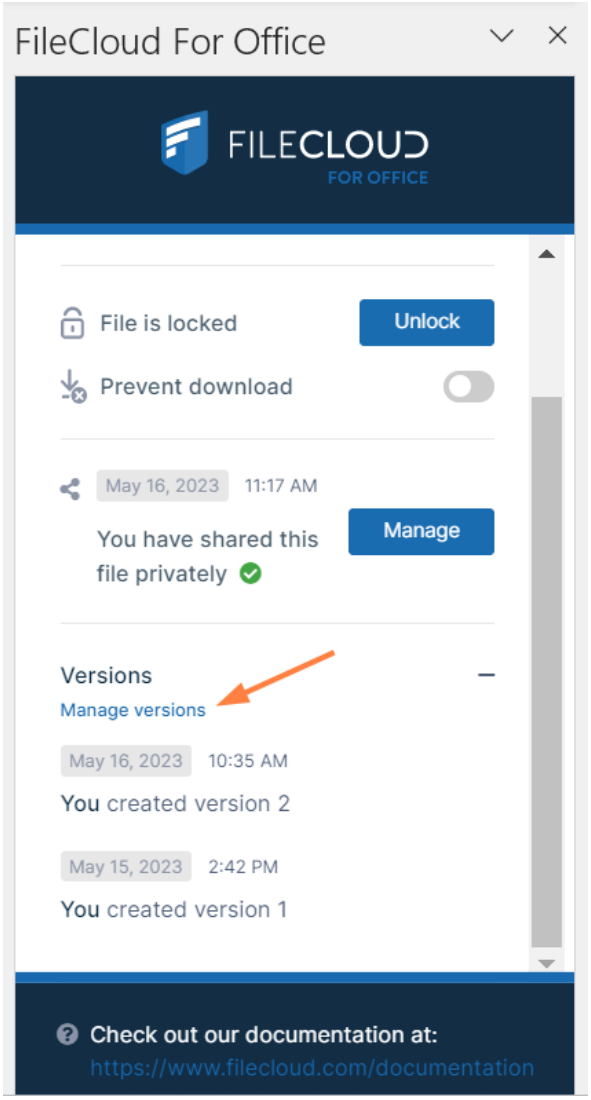


The expanded **Versions** section shows you version information about the file.

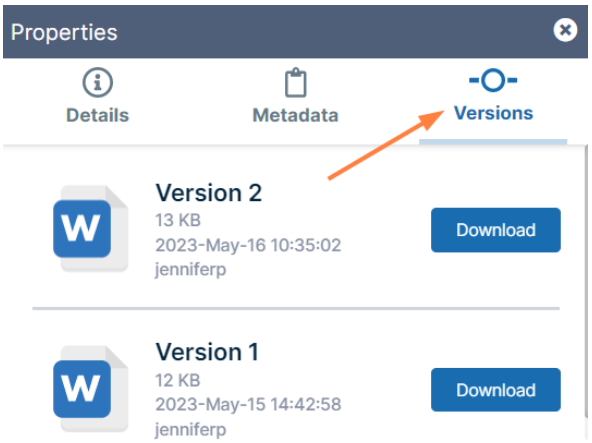


To download file versions in FileCloud for Office:

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



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

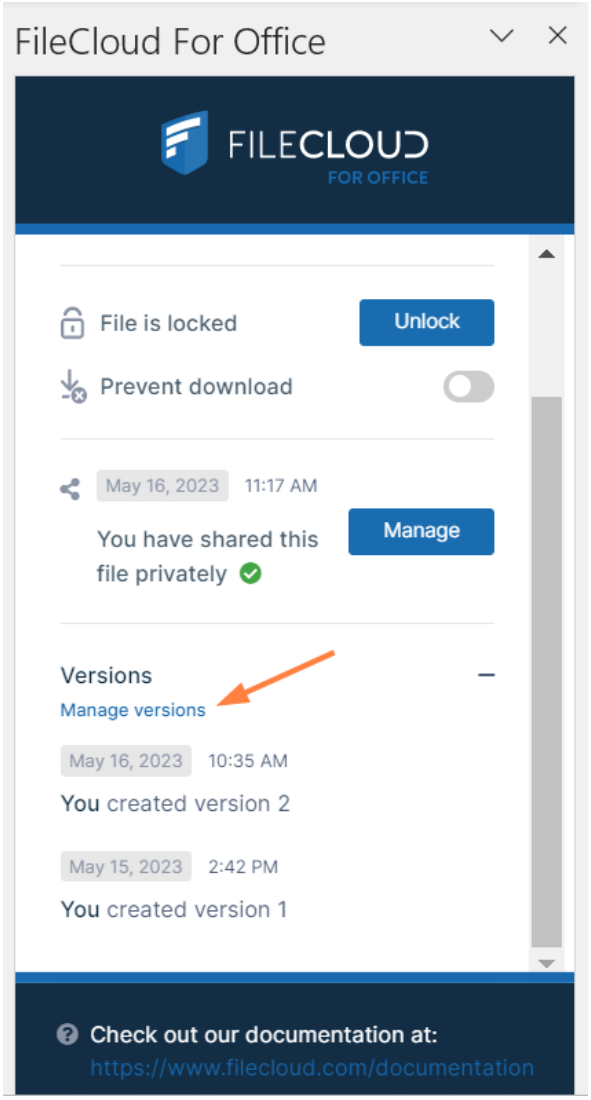


2. Click **Download** for the version that you want to download, and save it.

Details

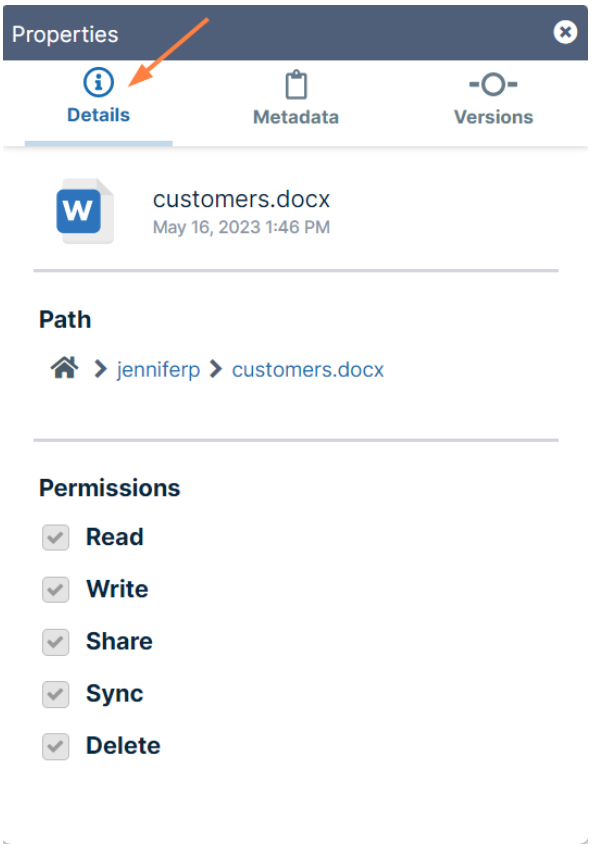
To view file details:

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



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

2. Click the **Details** tab.

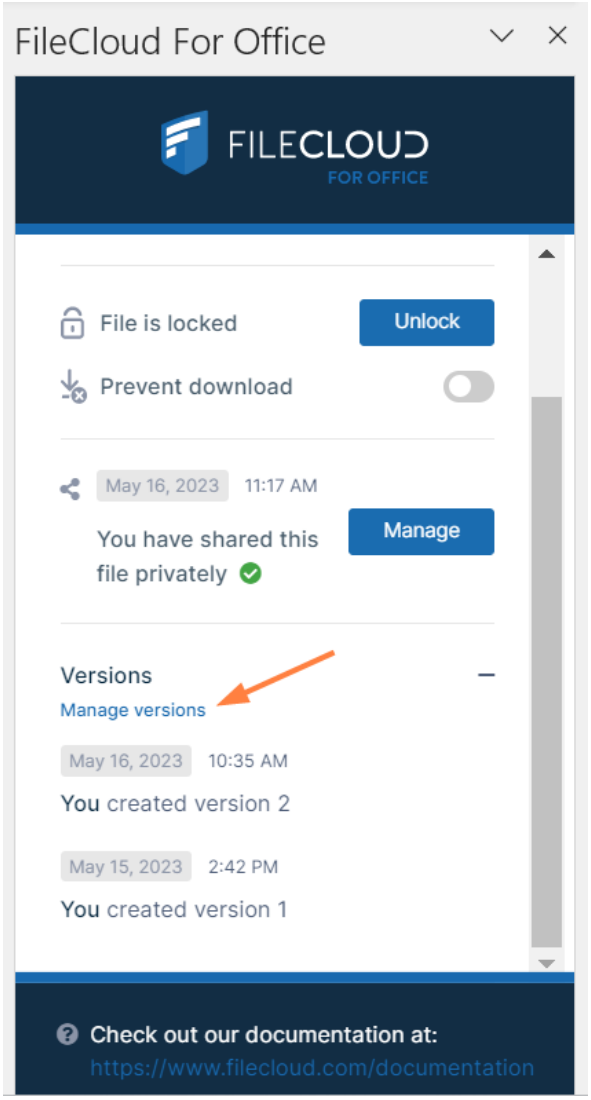


The details shown are the filename and type, the last modified date, the path of the file in FileCloud, and your permissions for the file.

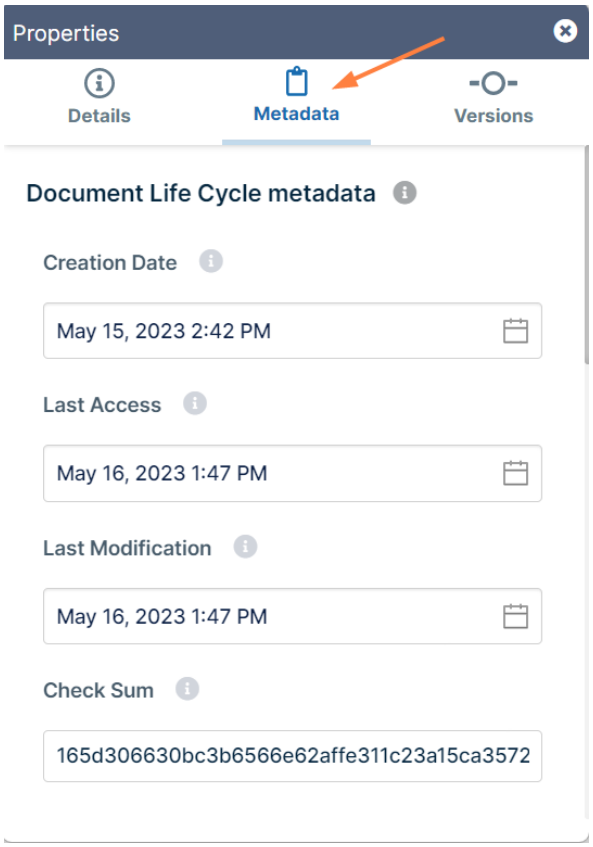
Metadata

To view metadata information for the file:

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



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



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

FileCloud for Office log locations

Locating FFO logs

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

Windows: %appdata%/FFOServer

macOS: /Users/[USERNAME]/Library/Preferences/FFOServer

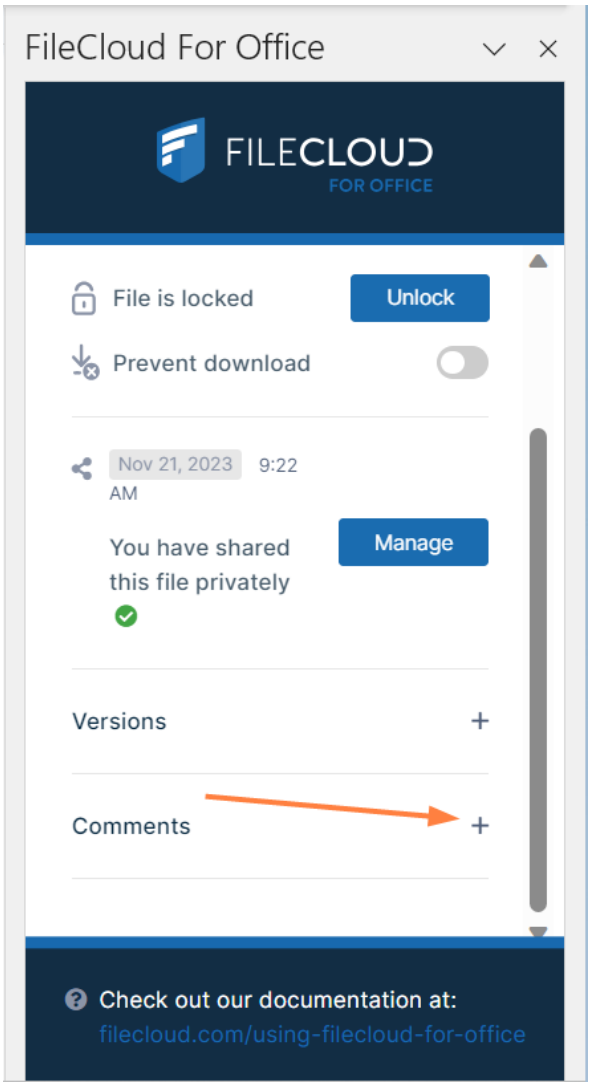
View and add comments

Viewing and adding comments

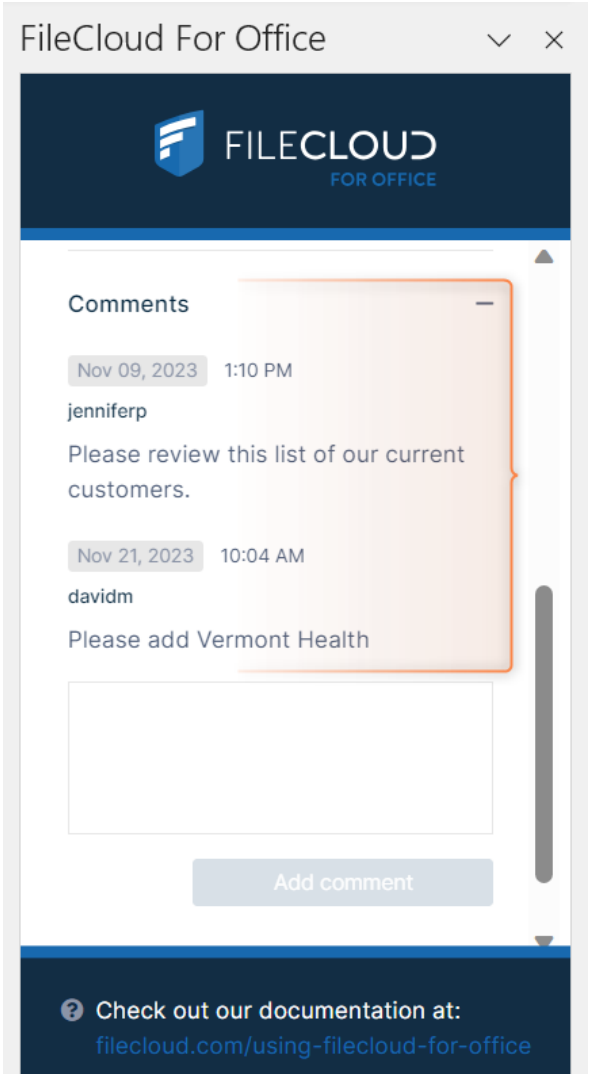
Comments added to files and folders in FileCloud for Office also appear in the user portal and any of the other client apps.

To view and add comments in FileCloud for Office:

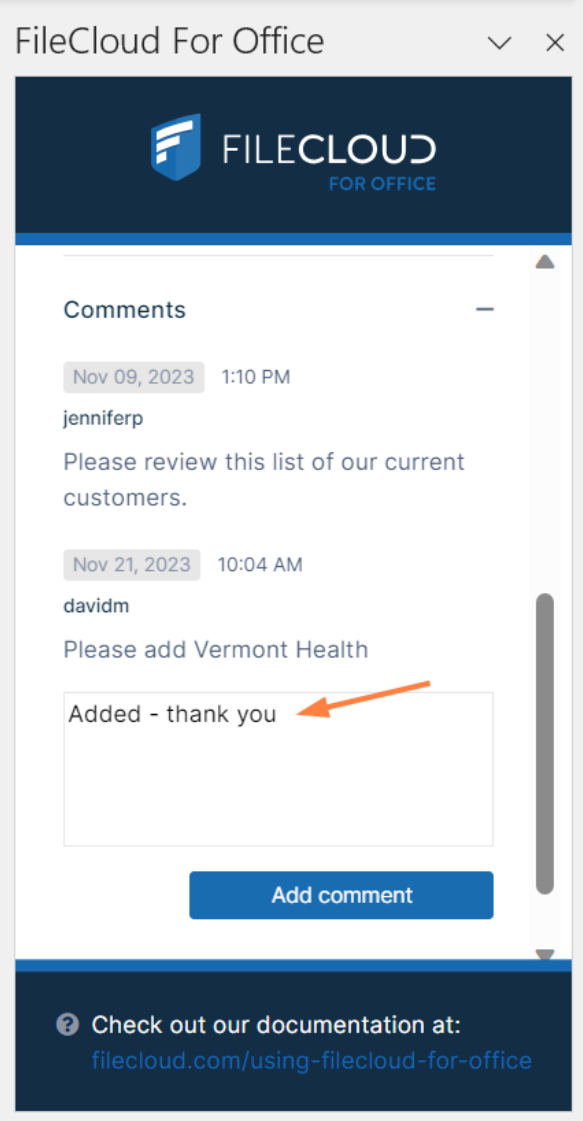
1. If **Comments** is not visible in the FileCloud for Office panel, scroll down to the bottom of the panel.
2. Click the **+** across from **Comments**.



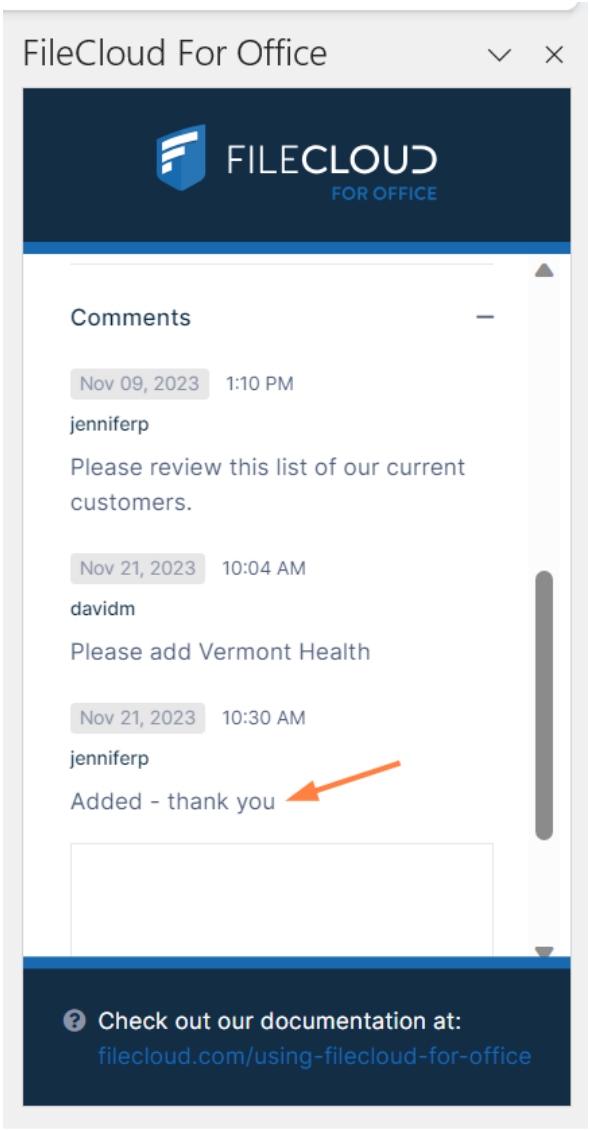
Any existing comments added to the file or folder here or anywhere else in FileCloud appear above the **Comments** box.



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



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

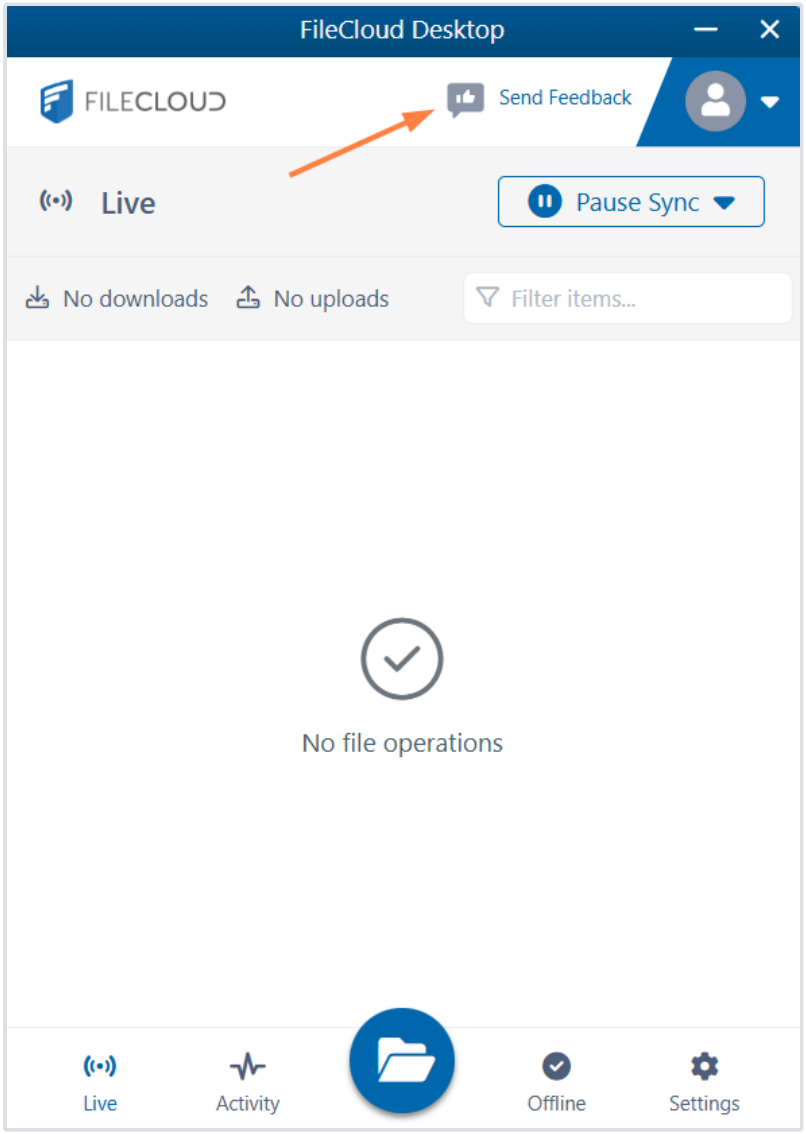


Sending Feedback from FileCloud Desktop for Windows

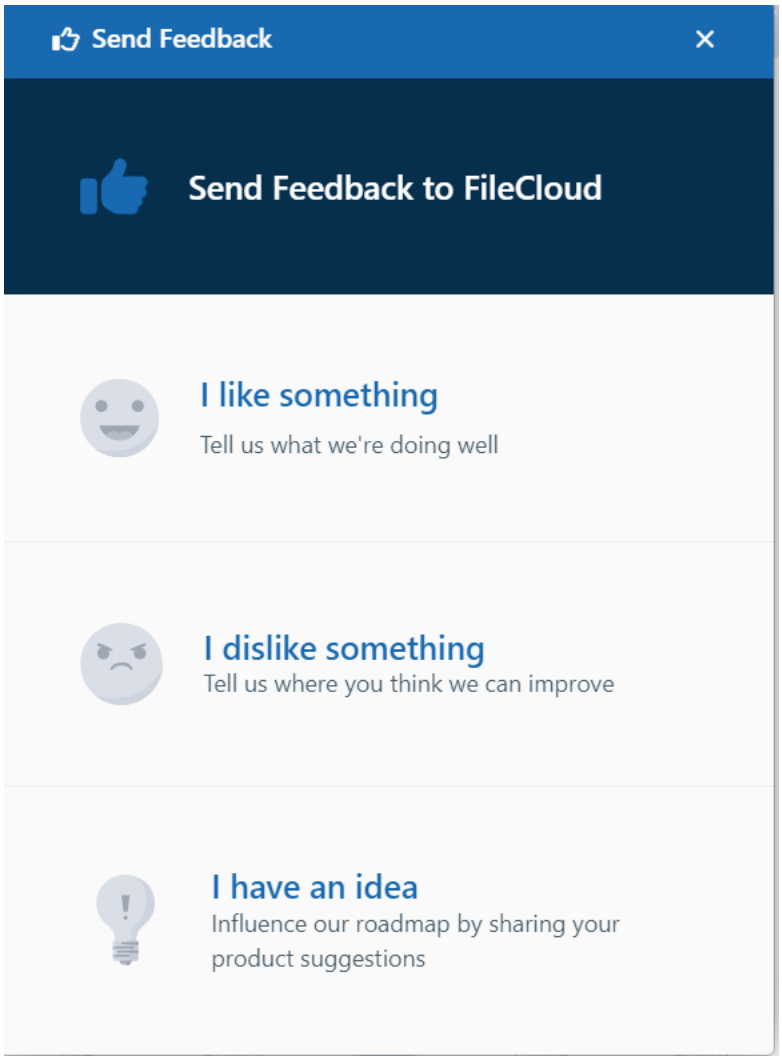
You can send feedback about FileCloud Desktop for Windows to FileCloud directly from the dashboard.

To send feedback:

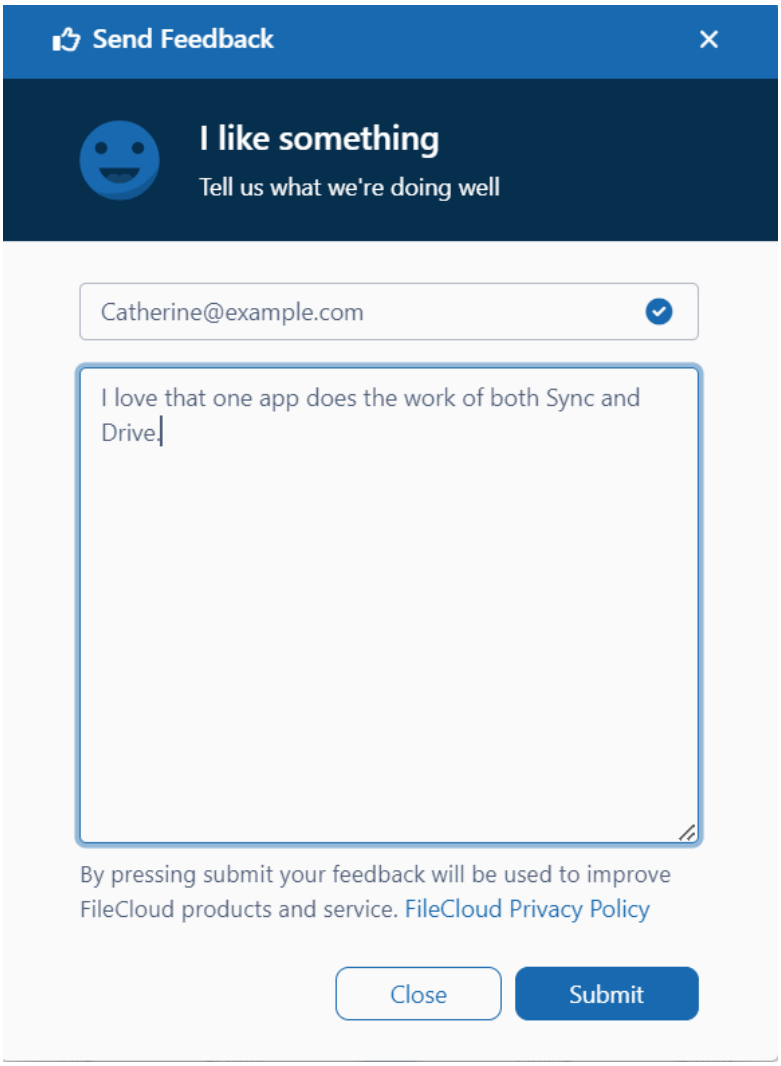
1. From any tab in the dashboard, click **Send Feedback**.



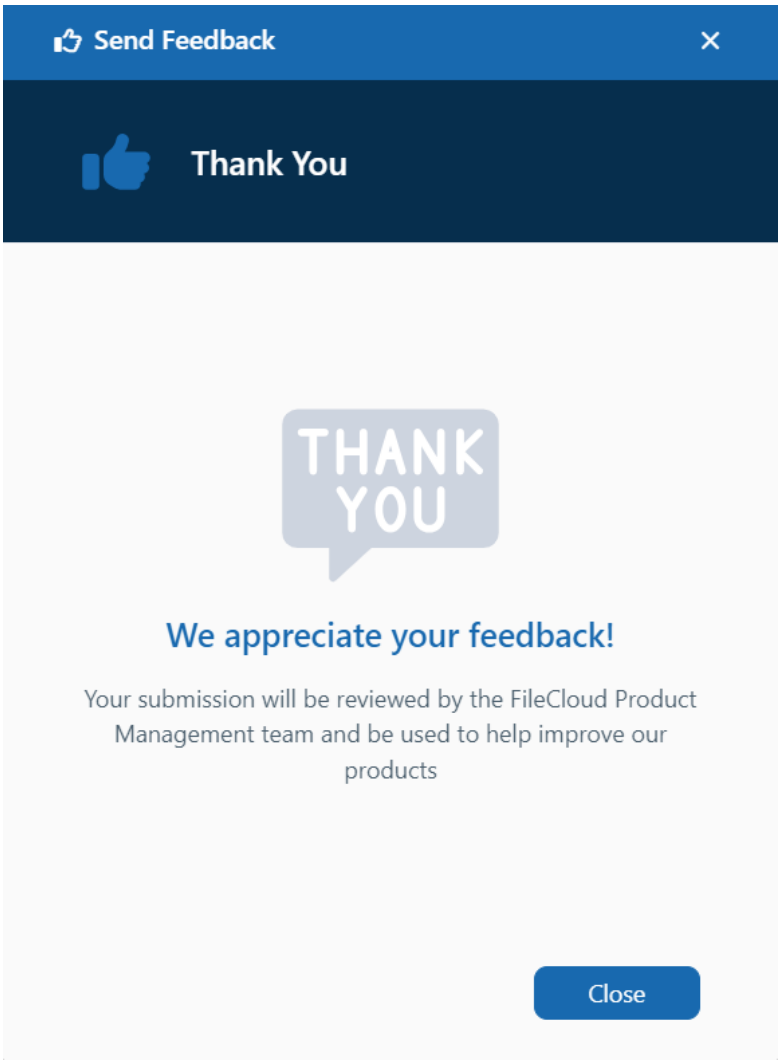
A **Send Feedback** screen opens:



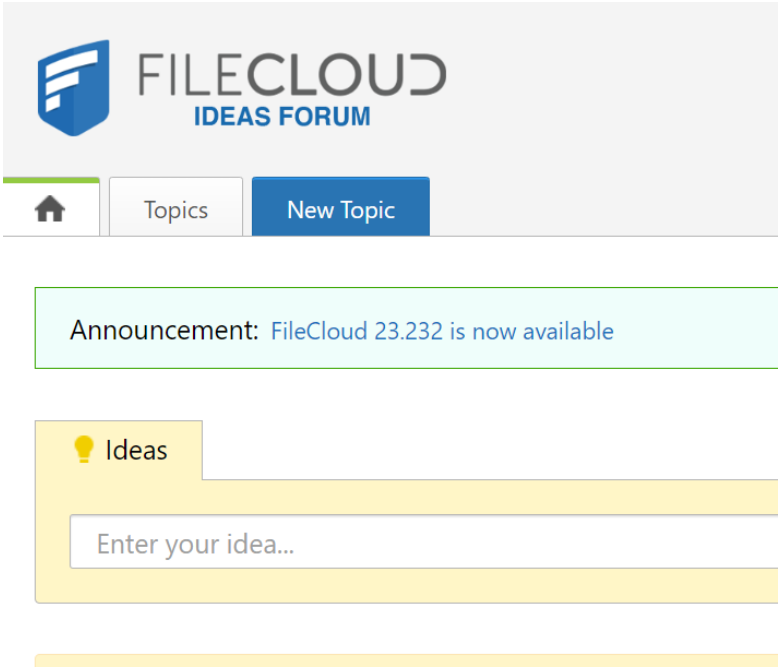
2. To send a message about something you like or dislike:
    a. Click **I like something** or **I dislike something**, and enter your email and comment.



b. Click **Submit**.
A message tells you that the FileCloud Product Management team will review your message.



3. To share an idea, click **I have an idea**.
   You are taken directly to the FileCloud Ideas forum, where you can enter your idea.



White Labeling in FileCloud Desktop for Windows

Self service white labelling for FileCloud Desktop for Windows is available in version 23.253.0 and later.

There are two different options for white labeling your FileCloud Desktop for Windows user interface:

- **Complete white labeling** - Customers with Enterprise Advanced licenses can use this option, which enables branding with custom logos and names for system components. **Complete white labeling** is optimal for OEM's and service providers. If you are interested, please Contact FileCloud Support to confirm that you meet minimum eligibility requirements.
- **Self service white labeling** - All customers can take advantage of this feature, which enables customization of the product name and support docs url through a simple JSON file, as shown in the instructions below. MDM installation is also required.

Customization of product documentation is not supported; however, upon request, product documentation can be provided to you in Word format for your own customization.

Complete white labeling

Once you have confirmed your eligibility for white labeling and purchased it through FileCloud Sales, you will be asked to set up an update server for the white labeled system and to provide FileCloud

Support with icons, strings, and other resources necessary for the customization. FileCloud Support will provide you with a custom installer for FileCloud and custom FileCloud upgrades.

Self service white labeling

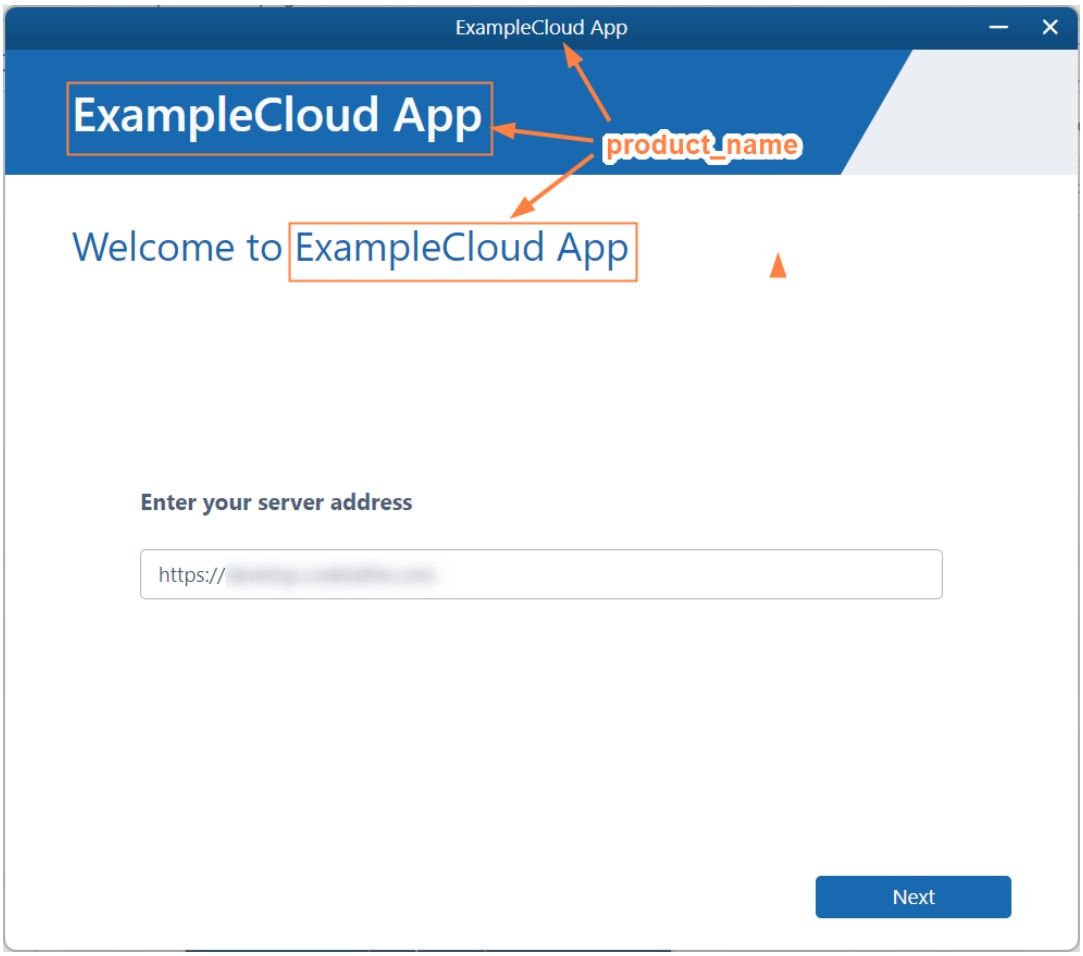
To complete self service white labeling, create your JSON file in the format shown below and install it on your user's FileCloud Desktop for Windows clients using mass deployment.

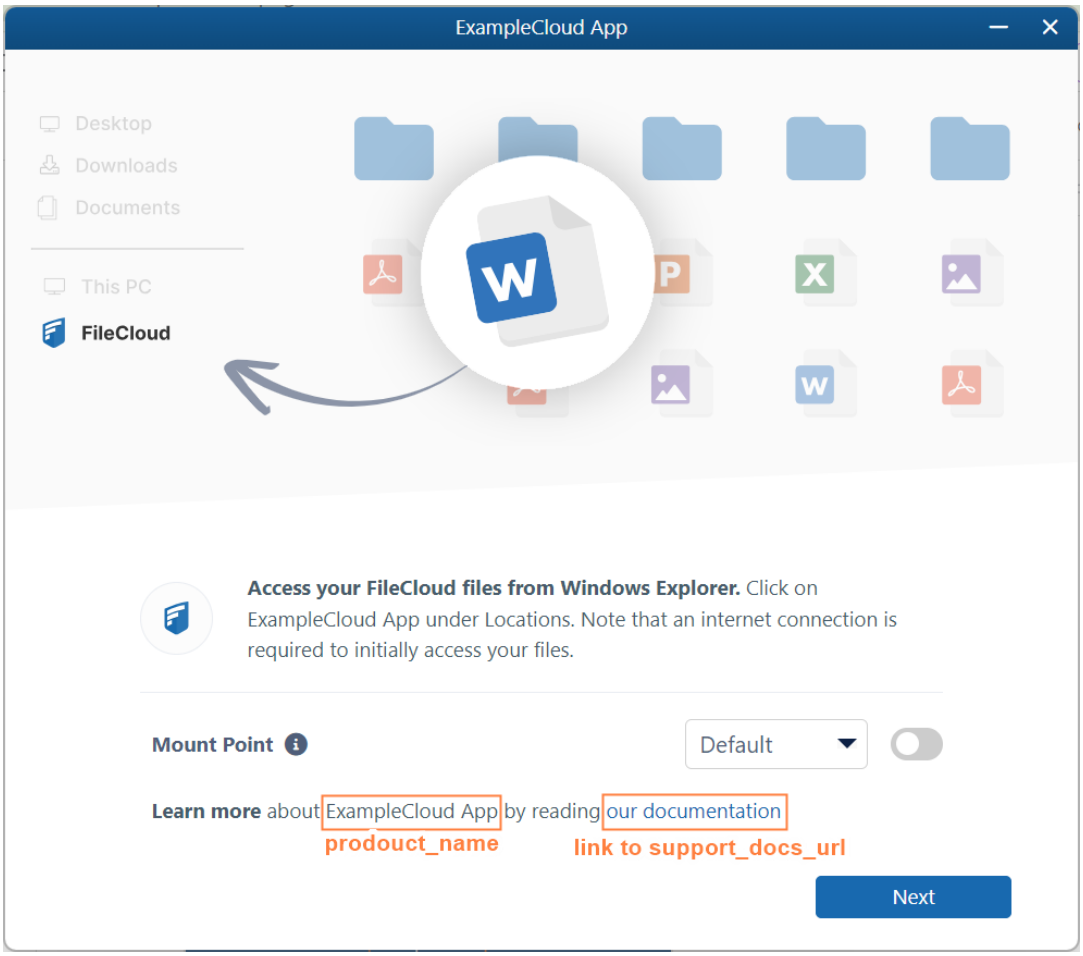
To initially create the JSON file:

1. In a text editor such as Notepad, create a file with the following contents, but enter your own values for the keys.
   Exclude any of the properties you do not want to customize.

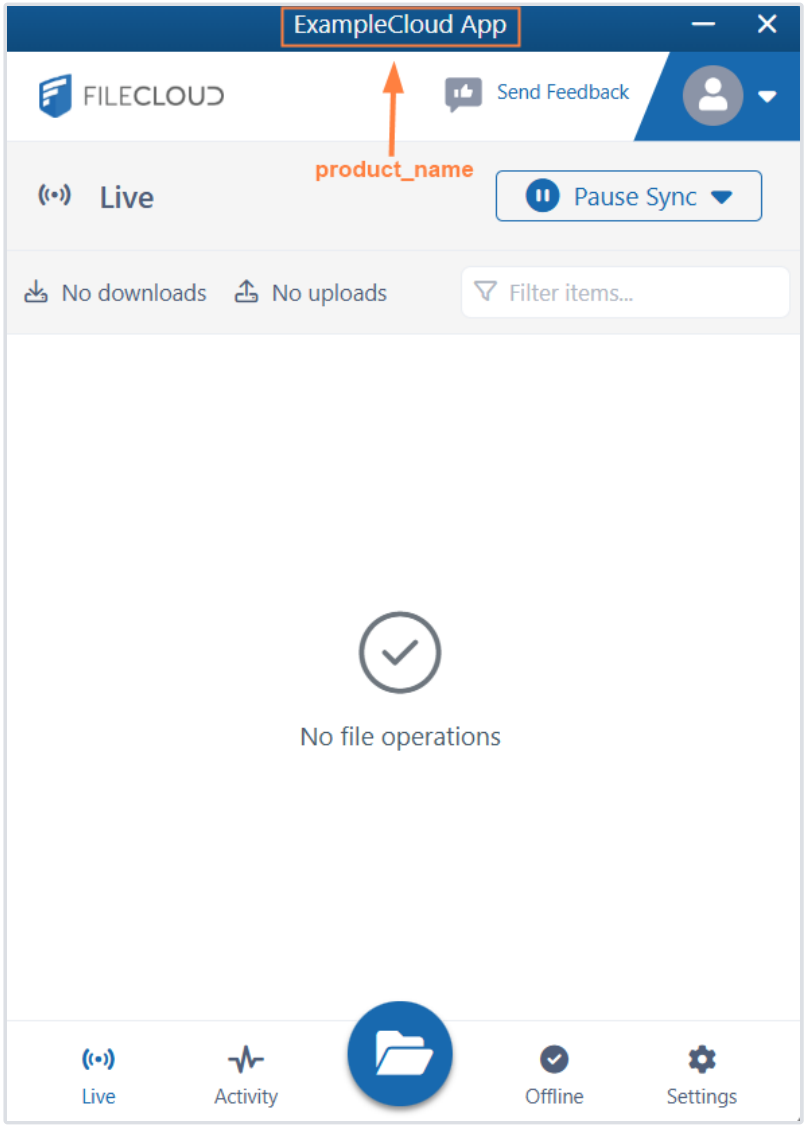
   ```
   {
   "product_name": "ExampleCloud App",
   "short_company_name": "MyCompany",
   "upgrade_url": "https://www.example.com/download/",
   "support_docs_url": "https://www.example.com/doc/",
   "display_name_shell": "ExampleCloud"
   }
   ```

   The fields appear in the following locations in FileCloud:
   product_name - Log-in wizard and dashboard
   upgrade_url - Not used in user interface
   support_docs_url - Log-in wizard and dashboard
   display_name_shell - Windows explorer (application root)
2. In Windows explorer, enter %APPDATA%.
3. Create the folder **Cloud Branding** in **%APPDATA%** if it doesn't exist already.
4. Save your json file in **%APPDATA%\Cloud Branding** as **cloud_storage_branding.json**.
5. When users open or restart FileCloud Desktop, they will see your customizations in the following locations:
   - Login Wizard

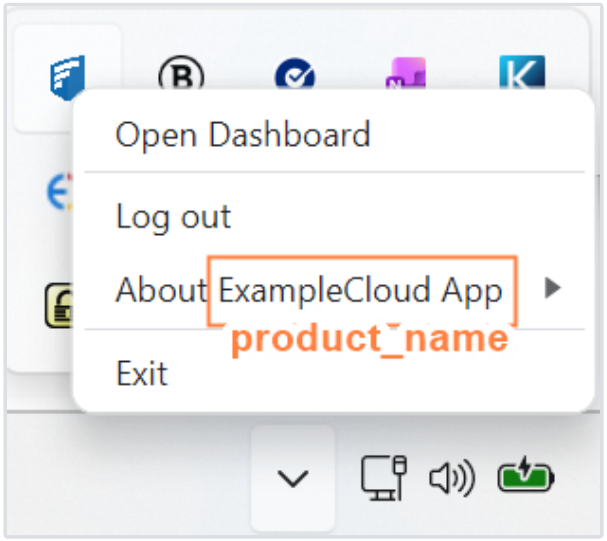

ExampleCloud App
ExampleCloud App
product_name
Welcome to ExampleCloud App
Enter your server address
https://
Next



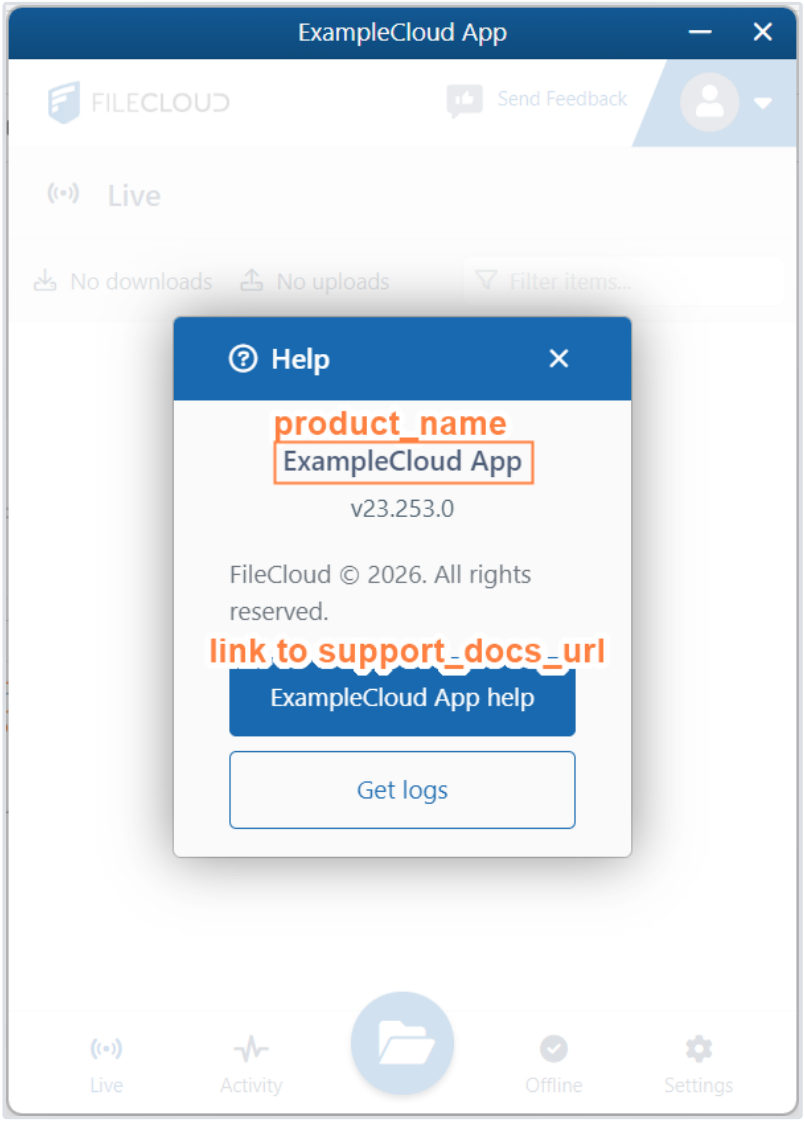
- Title bar in dashboard



- Right-click menu for icon in desktop tray



- Help popup



- Windows explorer



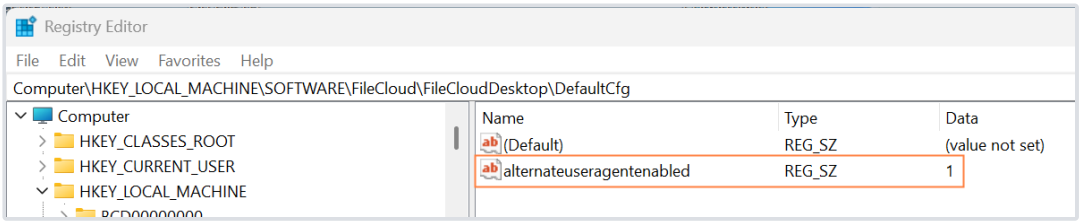
Set up Automatic SSO Authentication for ADFS Windows Users

Automatic SSO authentication for ADFS users is available in FileCloud Desktop for Windows beginning in version 23.253.4.

You can configure FileCloud Desktop for Windows to automatically log in ADFS users with single sign-on. The users are not prompted to enter any login information; when they open FileCloud Desktop, it automatically checks the value of the %username% environment variable in Windows and logs the user in using that value.

To set up automatic SSO authentication for ADFS users:

1. Set up Windows Integrated Authentication (WIA).
   https://learn.microsoft.com/en-us/aspnet/web-api/overview/security/integrated-windows-authentication
2. Set up and enable ADFS SSO in FileCloud.
   See ADFS Single Sign-On Support for instructions.
3. On each Windows device, add the key **alternateuseragentenabled** to the registry.
   Perform the following steps either separately for each device or through Windows mass deployment.
   a. In the registry editor, navigate to
   HKEY_LOCAL_MACHINE\SOFTWARE\FileCloud\FilecloudDesktop\DefaultCfg.
   b. Create the key **alternateuseragentenabled**, and set it equal to **1**.



4. Restart FileCloud Desktop on each device.

Known Folder Redirection and FileCloud Desktop

If a user redirects a Windows known folder (like Documents or Desktop) into the FileCloud sync root, FileCloud Desktop for Windows resets that redirection back to default when the user logs out.

If the redirection was set up via PowerShell/SHSetKnownFolderPath, this reset fully reverses the change with no side effects.

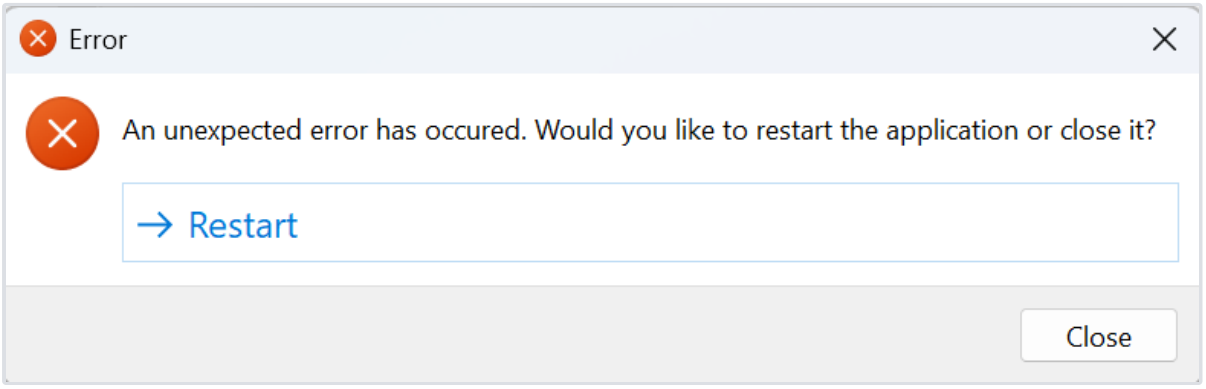
If the redirection was set up via Windows Explorer:

- **Files are not moved back automatically.** When you redirect a known folder in Explorer, Explorer moves its contents into the new (sync root) location. When FileCloud Desktop for Windows reverts the redirection, it does not move those files back out, but keeps them on the server to avoid accidental deletion.
- **The original folder is recreated, but empty.** Explorer deletes the original known-folder directory when you redirect it. When FileCloud Desktop for Windows reverts the change, it recreates that folder (empty) so Windows Explorer doesn't send warnings about a missing folder.

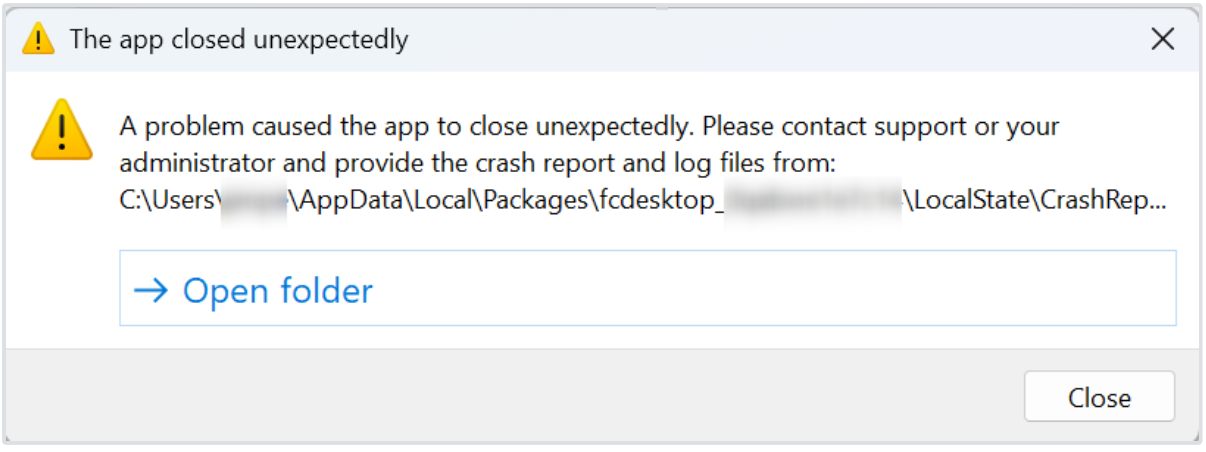
Accessing Crash Reports in FileCloud Desktop for Windows

Generation of crash reports in FileCloud Desktop for Windows is available beginning in version 23.253.4.

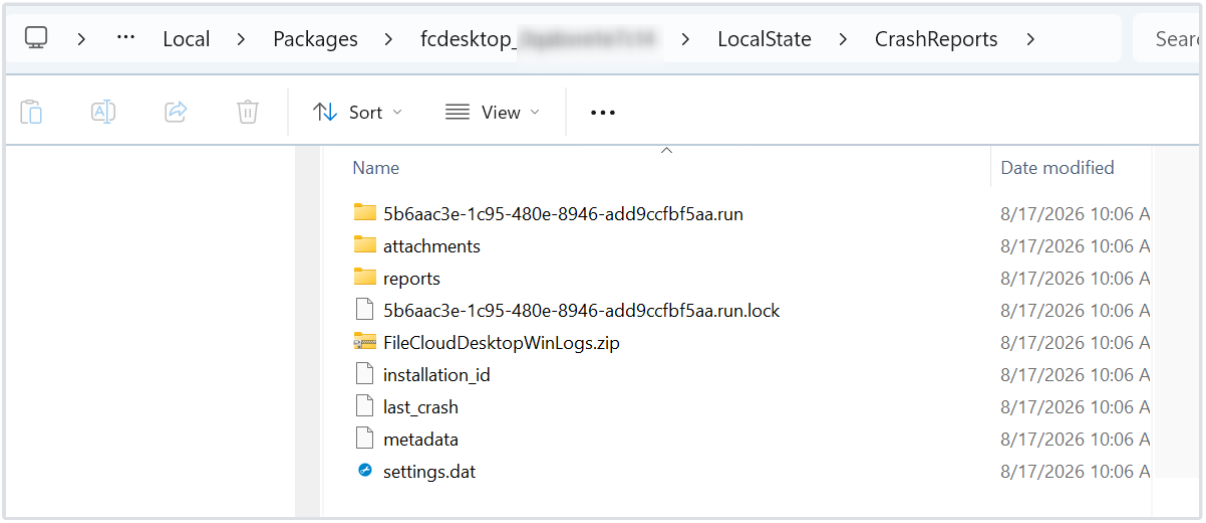
If FileCloud Desktop for Windows crashes, it automatically creates a crash report. When this happens, a notification gives you the option of restarting or closing the application:



If you choose to restart, a new notification prompts you to access the crash report and send it to your administrator, who can troubleshoot it or send it to FileCloud Support.
To access the crash report and log files, click **Open folder**.



If possible, navigate up to the **LocalState** folder and zip its contents. If there is secure information in the **LocalState** folder, zip the contents of the **CrashReports** folder. Send the zip file to your admin, who will either review the contents or send it to FileCloud Support.



Automatic Locking in FileCloud Desktop for Windows

Automatic Locking in FileCloud Desktop

FileCloud Desktop for Windows automatically locks files when they are opened in supported applications to prevent other users from overwriting changes while a file is being edited.

Files opened in applications that do not support automatic locking must be locked manually.

Supported applications

Automatic locking is supported for files opened in the following applications in FileCloud Desktop for Windows:

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint
- Adobe Acrobat
- Adobe Illustrator
- Adobe Photoshop
- AutoCAD
- Foxit PDF Editor

How locking works

When FileCloud Desktop is online

When a user locks a file while connected to the server, that user can read, edit, rename, move, or delete the file without the risk of other users overwriting their work.

While the user remains online, FileCloud Desktop renews the lock on the server every 3 minutes.

When FileCloud Desktop goes offline

If FileCloud Desktop locks a file and then loses its connection to the server, the lock is released after 3 minutes.

If both the server version and the local version of the file (in the FileCloud Desktop sync folder) are modified while the connection is interrupted, FileCloud Desktop creates a conflict file when the connection is restored. This preserves both sets of changes.

Lock indicators and notifications

- **Lock icon:** All users see a lock icon overlay on the file in File Explorer.
- **Read-only notification:** Other users who open a locked file are notified that the file is read-only and that their changes cannot be saved to the original file.
- **Download prevention:** If a file is locked in the user portal with **Prevent others from downloading this file while locked** enabled, other users cannot download the file.

Known limitations

- If a user manually locks a file and then edits it, the file may be unlocked automatically when the user closes it.
- If a user views the details of an automatically locked file in FileCloud for Office and clicks **Refresh**, the file may be unlocked. To avoid this, we recommend that users do not use FileCloud for Office when automatic locking is enabled.

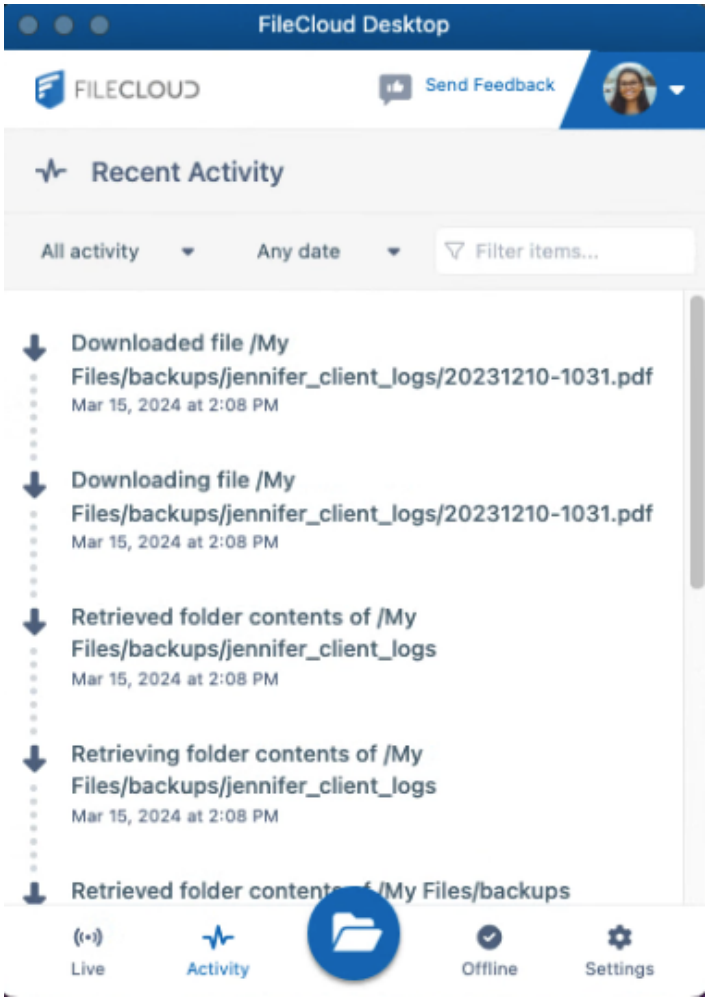
FileCloud Desktop for macOS

Beginning in FileCloud Desktop for macOS 23.253.3, a lock icon appears beside locked files in the macOS Finder.
Beginning in FileCloud Desktop for macOS 23.253, the following features are available:

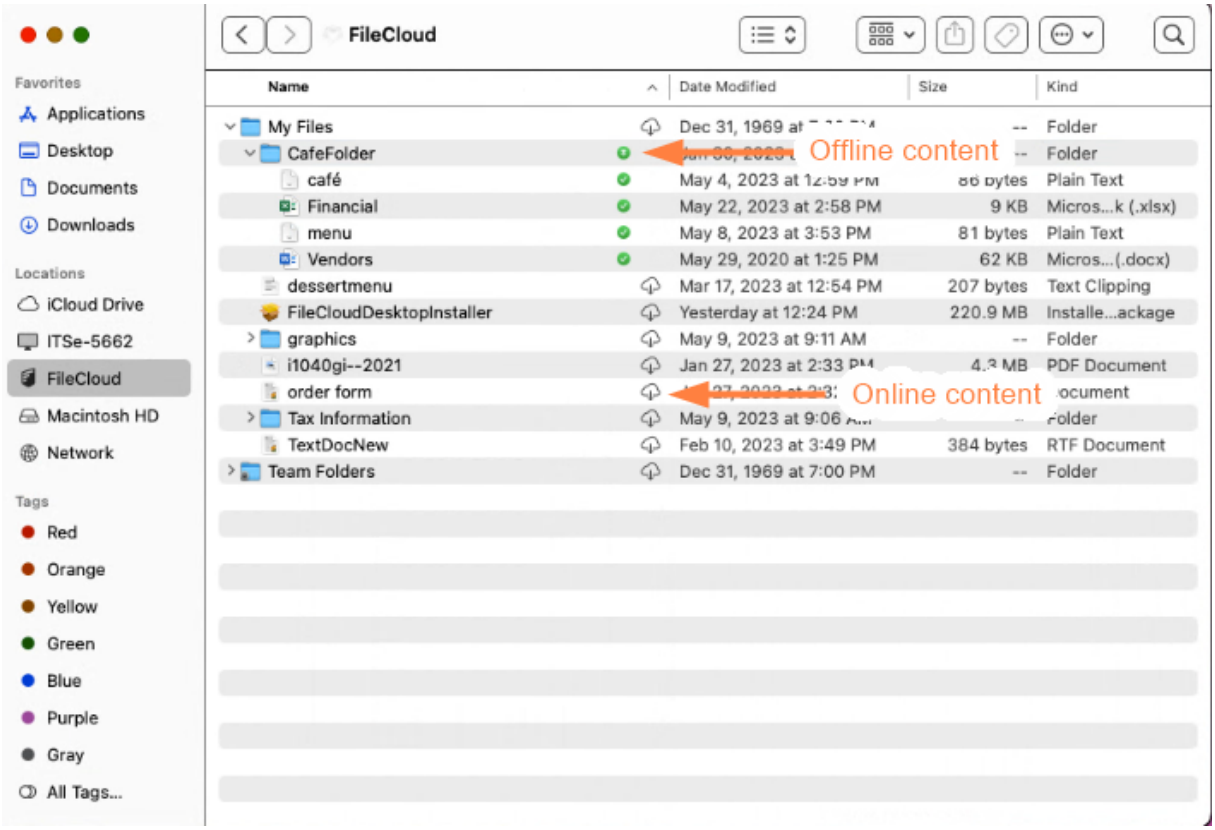
- Viewing content of WebDRM files
- Self-service user interface customization

FileCloud Desktop for macOS enables you to access your FileCloud files and folders in the Finder, where you can work with them online or make them available offline. Changes you make to offline files stored in FileCloud are immediately synced to the copies in FileCloud.

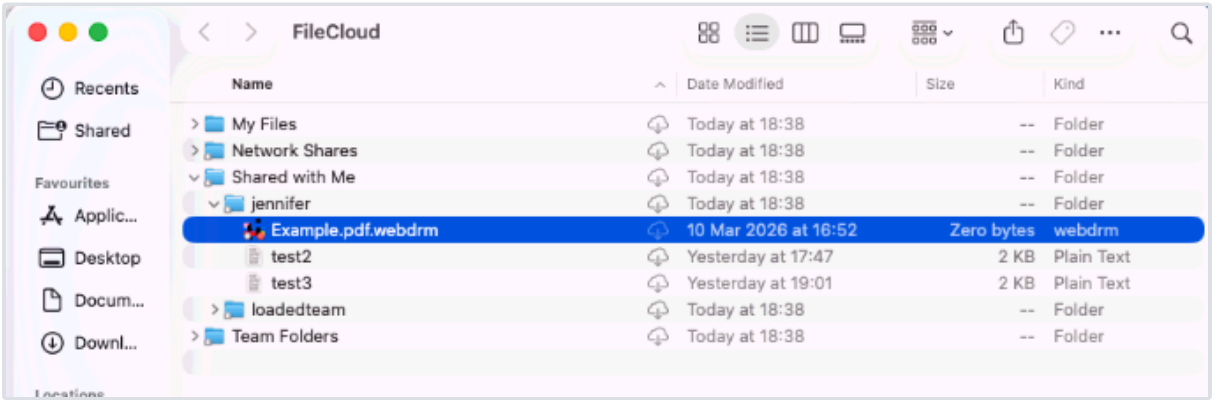
FileCloud Desktop for macOS opens as a dashboard that shows you live and recent actions and the folders you have downloaded offline, and also gives you access to user settings:



When you open FileCloud Desktop, its **FileCloud** folder becomes available in your Finder. From there, you can work with your files online, or download them and work with them offline. Your online files and folders appear with cloud icons beside them. When you work with them, you are working with the copies in FileCloud, and if you view your user portal, you can see the modifications there. Your downloaded folders and their files are marked with green icons with check marks. When you work with them, you are working with downloaded copies of the files, but your changes are immediately synchronized to FileCloud.



Files shared with the Secure Web Viewer requirement can be viewed through the Secure Web Viewer from FileCloud Desktop. The files appear in the FileCloud root under Shared with Me with a .webdrm extension as they would in the web browser. Click **Open** to view a .webdrm file through the Secure Web Viewer.



FileCloud Desktop automatically installs with FileCloud for Office (FFO), which enables you to automatically lock and unlock Office files and share them when you open them from the FileCloud Desktop directory.

Begin by installing FileCloud Desktop, and then try out its various functions.

Installing and Upgrading FileCloud Desktop for macOS

FileCloud Desktop is supported on macOS Sequoia 15.7 and higher.
(Ventura 13.3.1 is not officially supported, but may function as expected.)

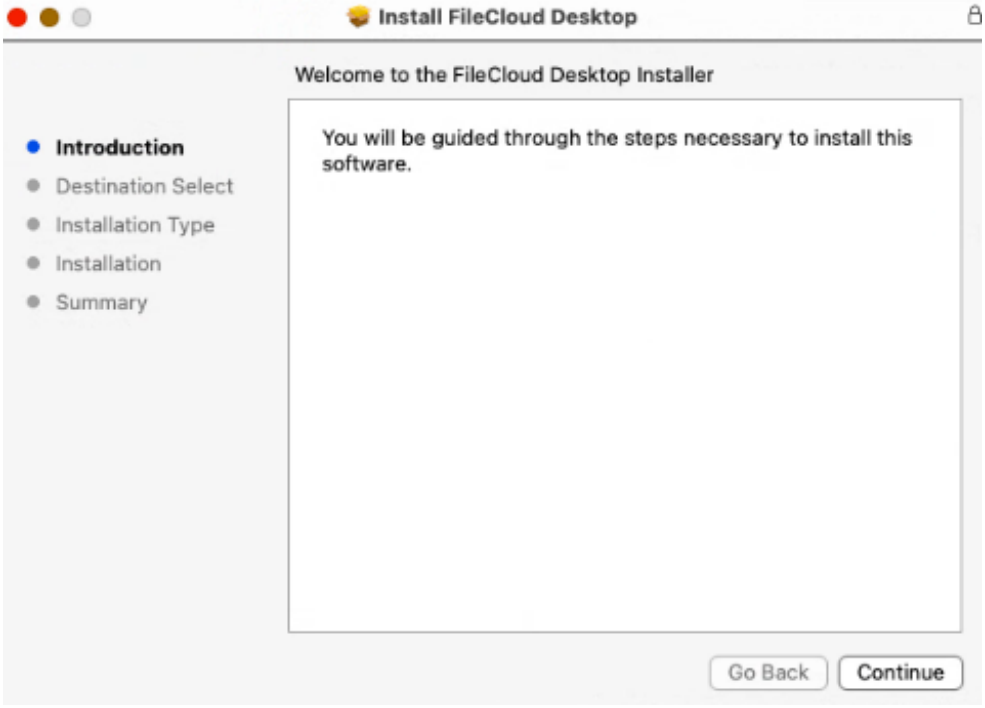
You must have FileCloud 23.1 or higher installed in order to use FileCloud Desktop for macOS.

To install or upgrade FileCloud Desktop on macOS:

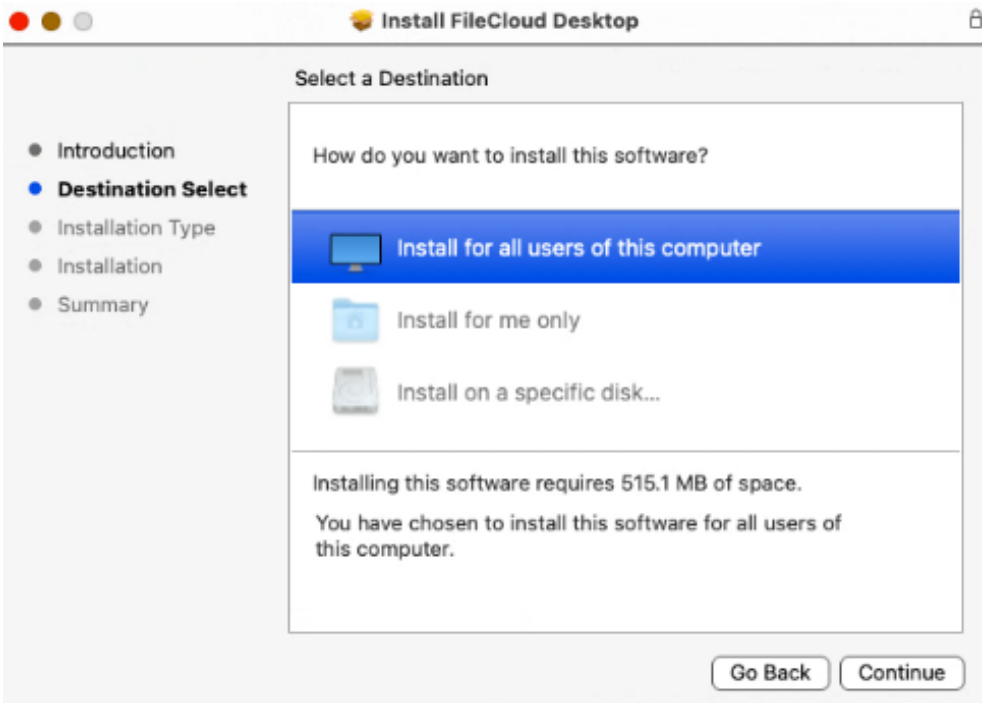
After you initially install FileCloud Desktop for macOS, it updates automatically, and you are not required to perform the following process to upgrade (unless you are using a version of FileCloud prior to 23.261).

1. ⚠ Uninstall FileCloud Sync if it is installed on the same machine that you are installing FileCloud Desktop on; otherwise, FileCloud Desktop will not work properly.
2. Install or upgrade to the latest FileCloud version if you do not have FileCloud 23.1 or higher already installed.

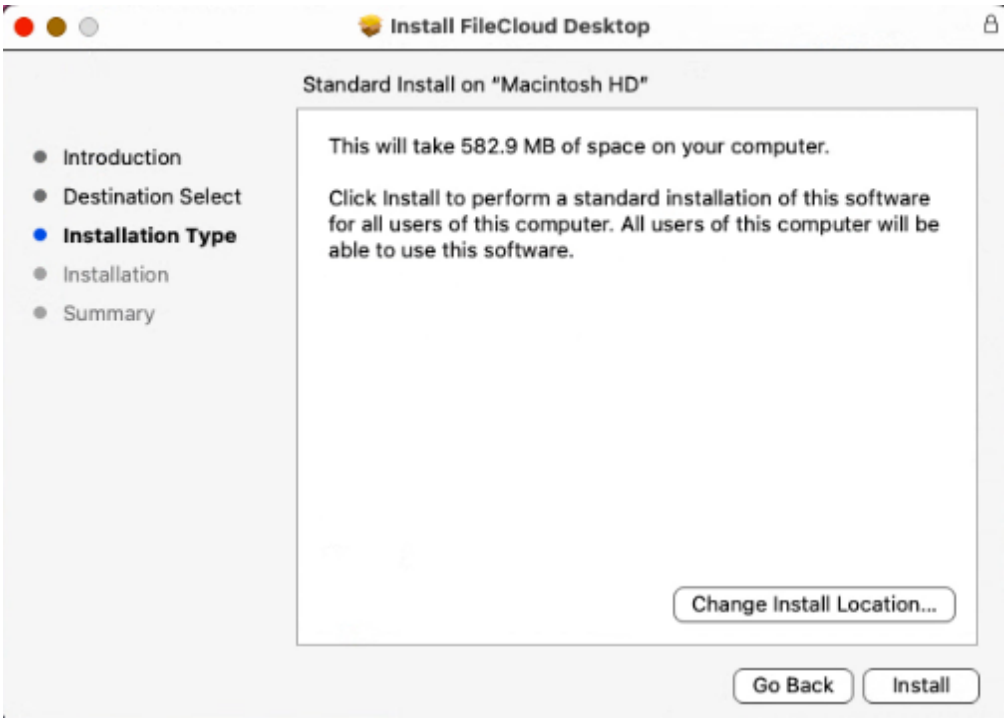
3. Download FileCloud Desktop for macOS at https://www.filecloud.com/additional-downloads/.
   Then unzip and run **FileCloudDesktopInstaller.pkg**.
   The installer's welcome screen opens:



4. Click **Continue**.
   The **Select a Destination** screen opens.

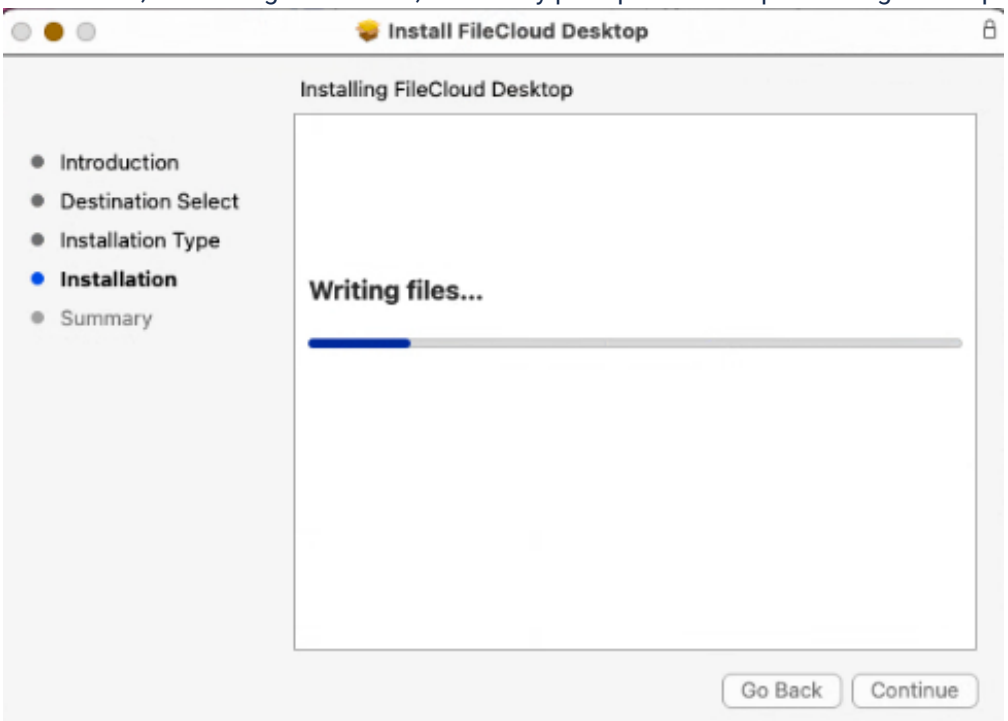


5. Leave Install for all users of this computer or select a different option, then click **Continue**.
   The **Installation Type** screen opens.

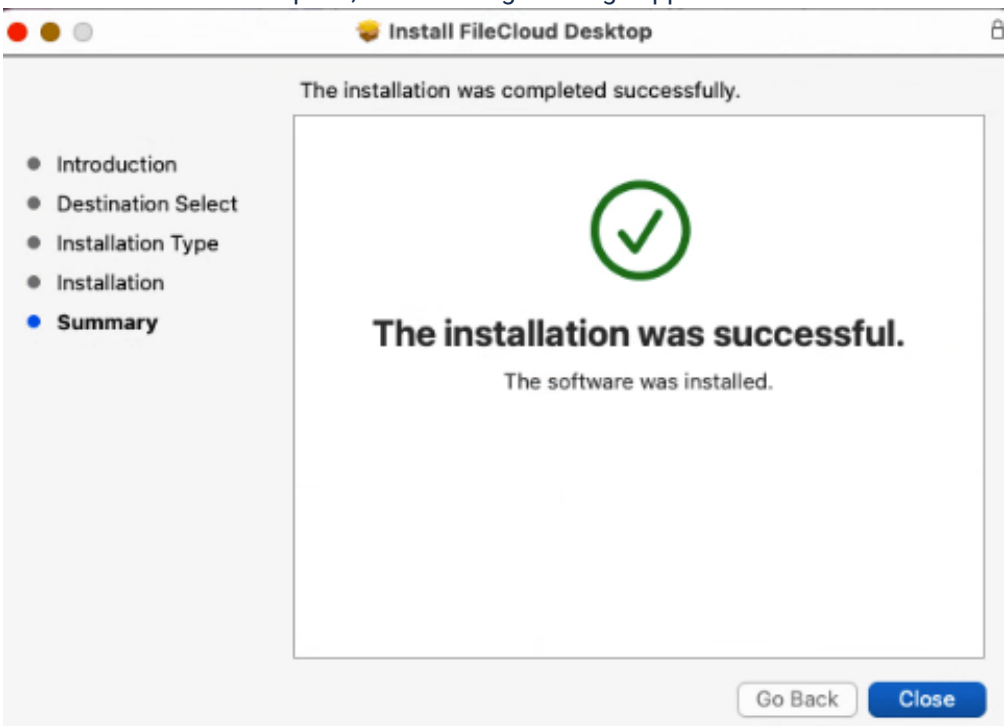


By default, FileCloud Desktop is installed in your **Apps** folder.

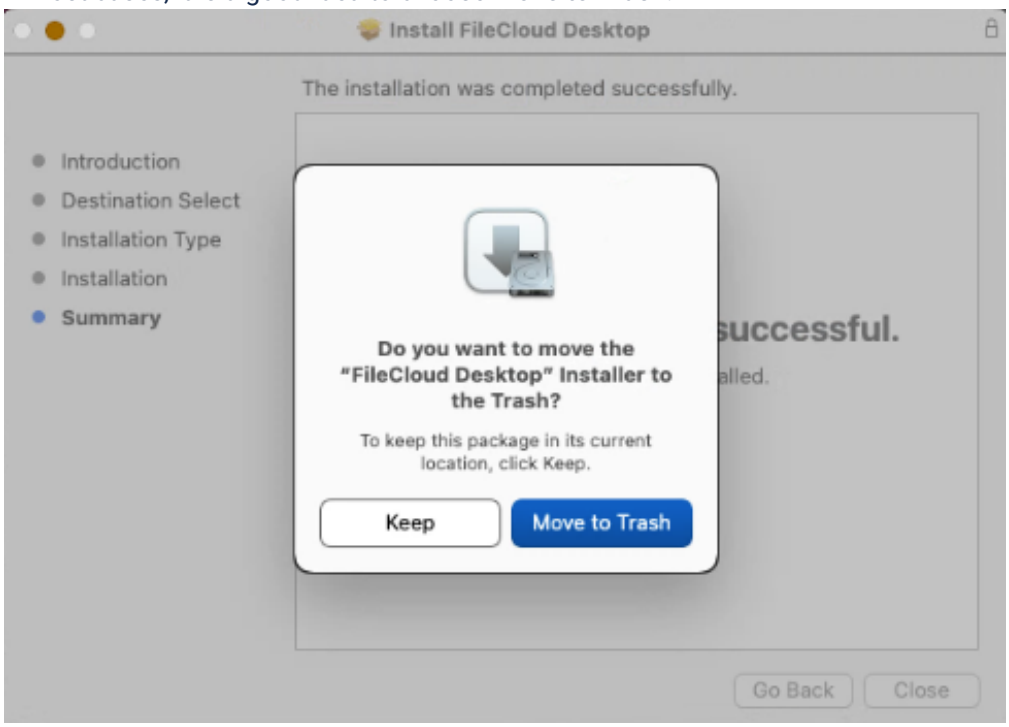
6. To install it in another location click **Change Install Location**.
7. Click **Install**, and during installation, follow any prompts to allow processing to complete.



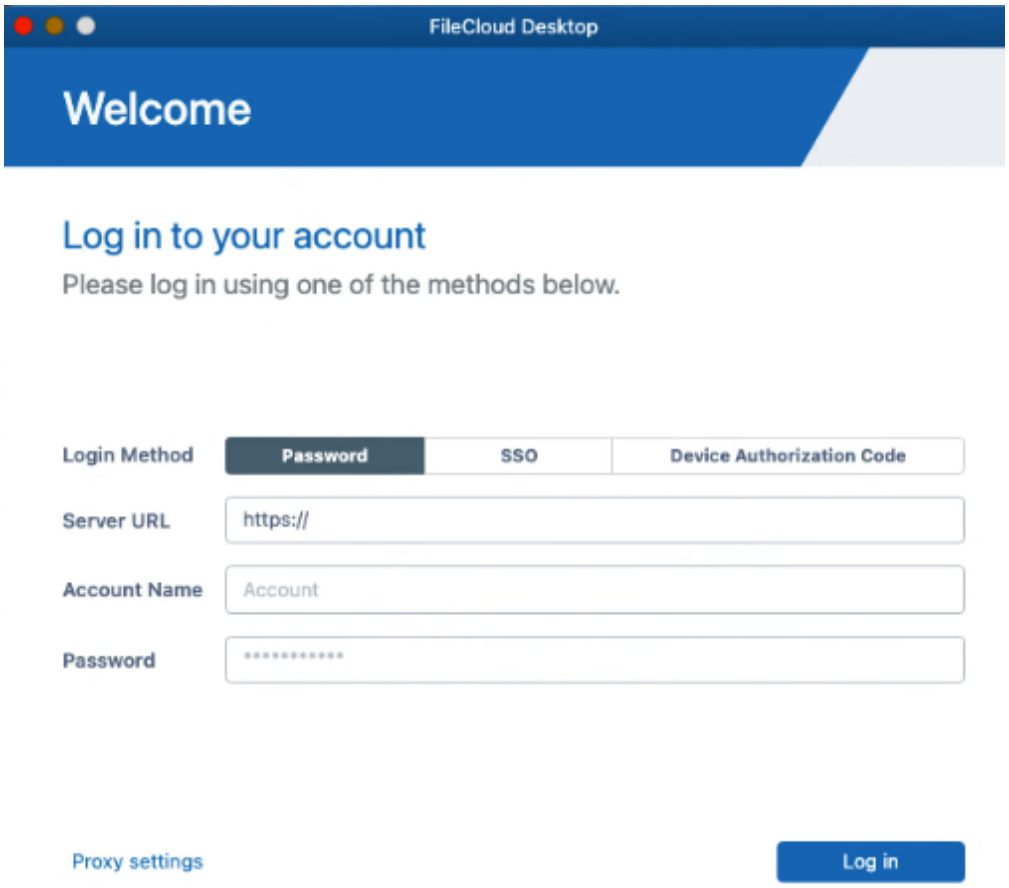
When installation is complete, the following message appears:



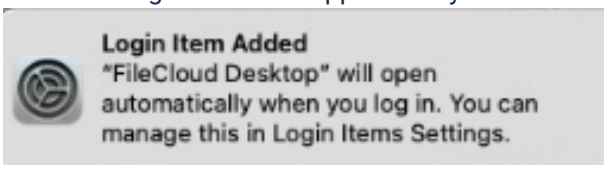
8. Click **Close**.
   The following message prompting you to move the installer application into your trash folder appears.
9. In most cases, it is a good idea to choose **Move to Trash.**



When installation is complete, the FileCloud Desktop login page opens.



The following notification appears on your screen..



10. If you do not want FileCloud Desktop to open automatically when you log in, you can change the setting after you log into the application.
    If you do not want related software running in the background, change it in your System Settings in **General > Login Items**.

To migrate from FileCloud Sync to FileCloud Desktop for macOS:

1. Upload all files and folders that you want to migrate from FileCloud Sync to FileCloud Desktop for macOS to the FileCloud server.
2. Uninstall FileCloud Sync.
3. Install FileCloud Desktop for madOS following the procedure Installing and Upgrading FileCloud Desktop for macOS | To install or upgrade FileCloud Desktop on macOS:, above.
4. When you log in to FileCloud Desktop for macOS, a new sync root is populated from the server with your files.

Admins: Users who are running the FileCloud Desktop for macOS app when it is being upgraded in the background must restart the app to see the updated version.

How autoupdates work

Beginning in FileCloud 23.261, FileCloud Desktop for macOS is updated automatically by default.

If an autoupdate is available when a user is logged out of FileCloud Desktop for macOS, updating automatically occurs.

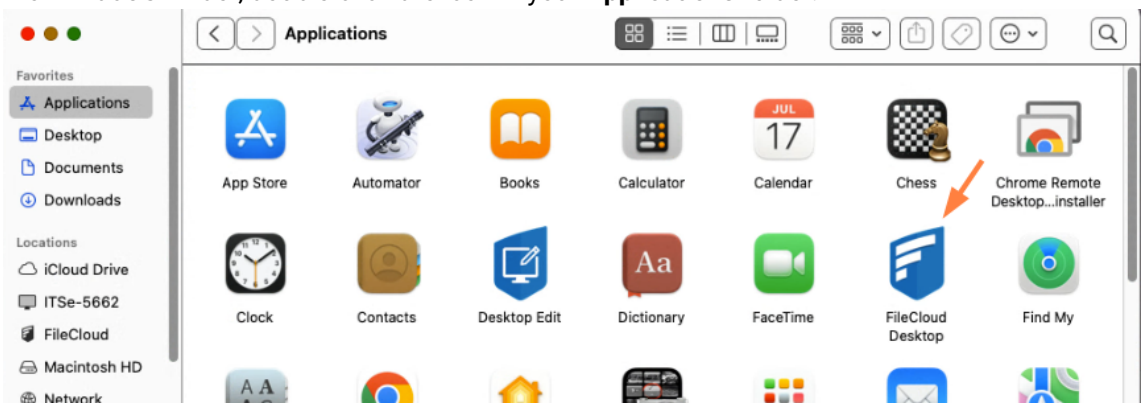
If an autoupdate is available when a user is logged in to FileCloud Desktop for macOS (or when a user logs in), FileCloud Desktop is upgraded and the application restarts automatically.

Opening and Logging in to FileCloud Desktop in macOS

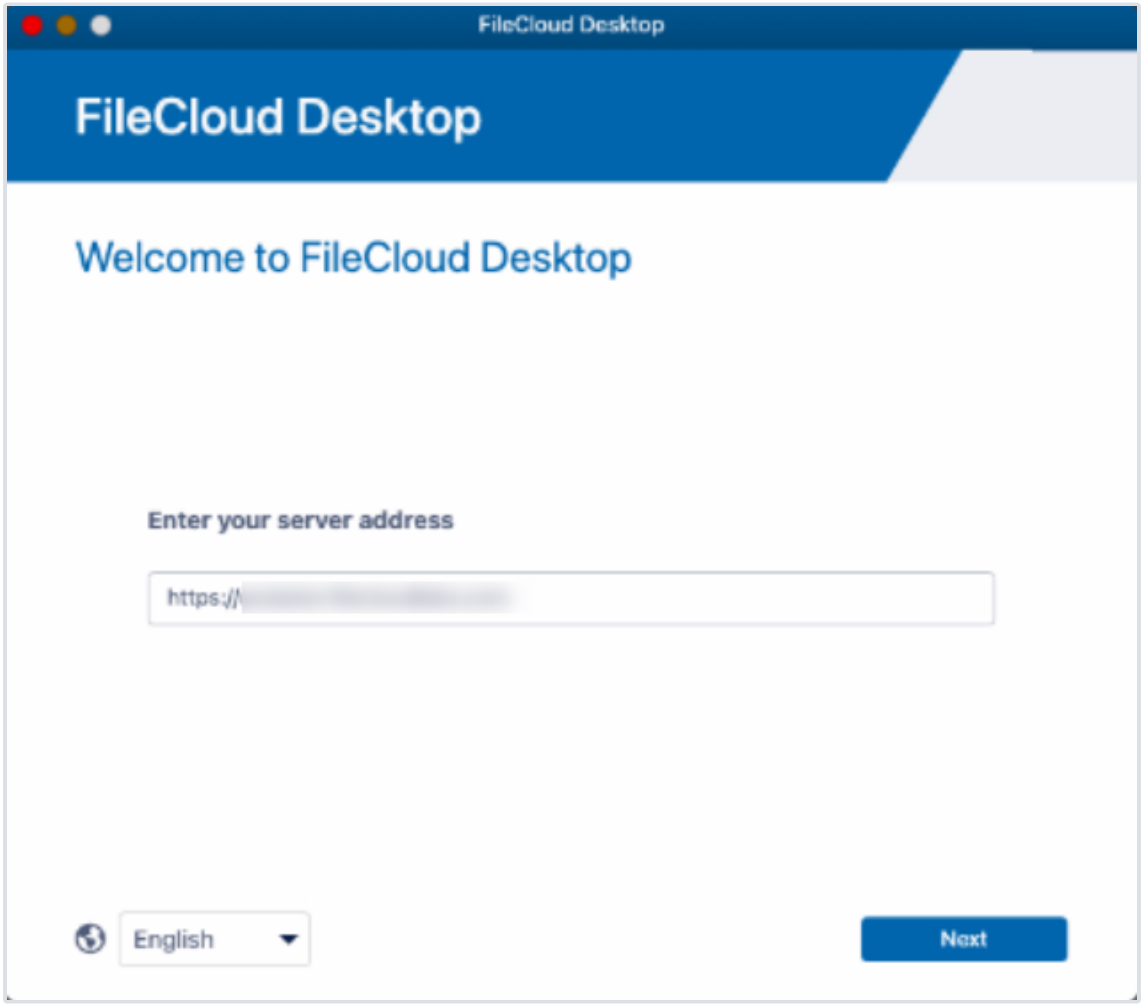
Initially, the login page for FileCloud Desktop opens after you install it. After that, by default, it opens automatically when you start up your computer. If you do not want it open automatically on startup, you can change the setting in FileCloud Desktop.

To open FileCloud Desktop's login screen:

1. From macOS Finder, double-click the icon in your **Applications** folder.



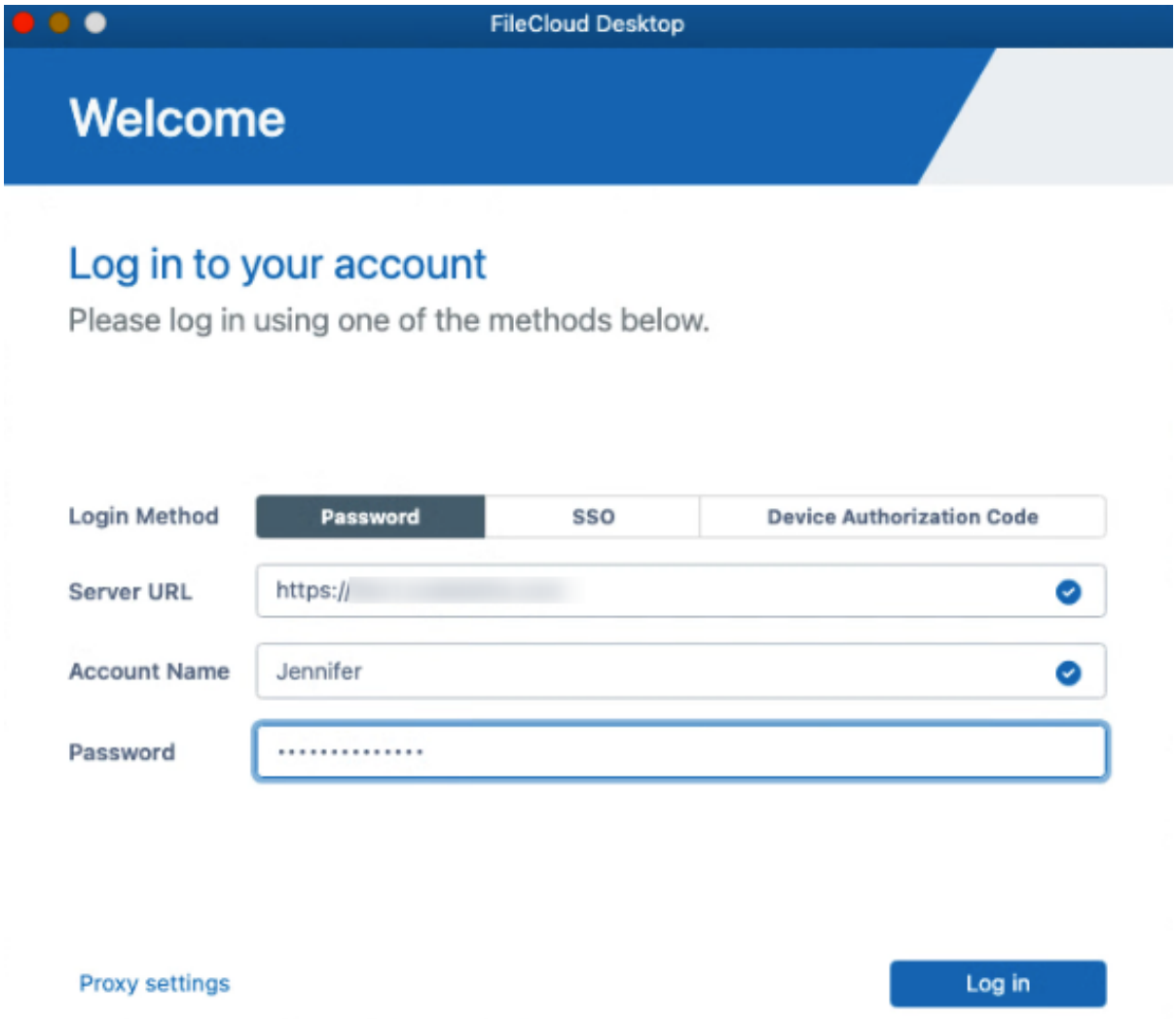
2. In the first screen of the login wizard, enter your server address.
   If you want to view the user interface in a different language than the default shown, choose a different option.



3. The next screen asks you to choose a login method.
   Choose one of the following login methods:

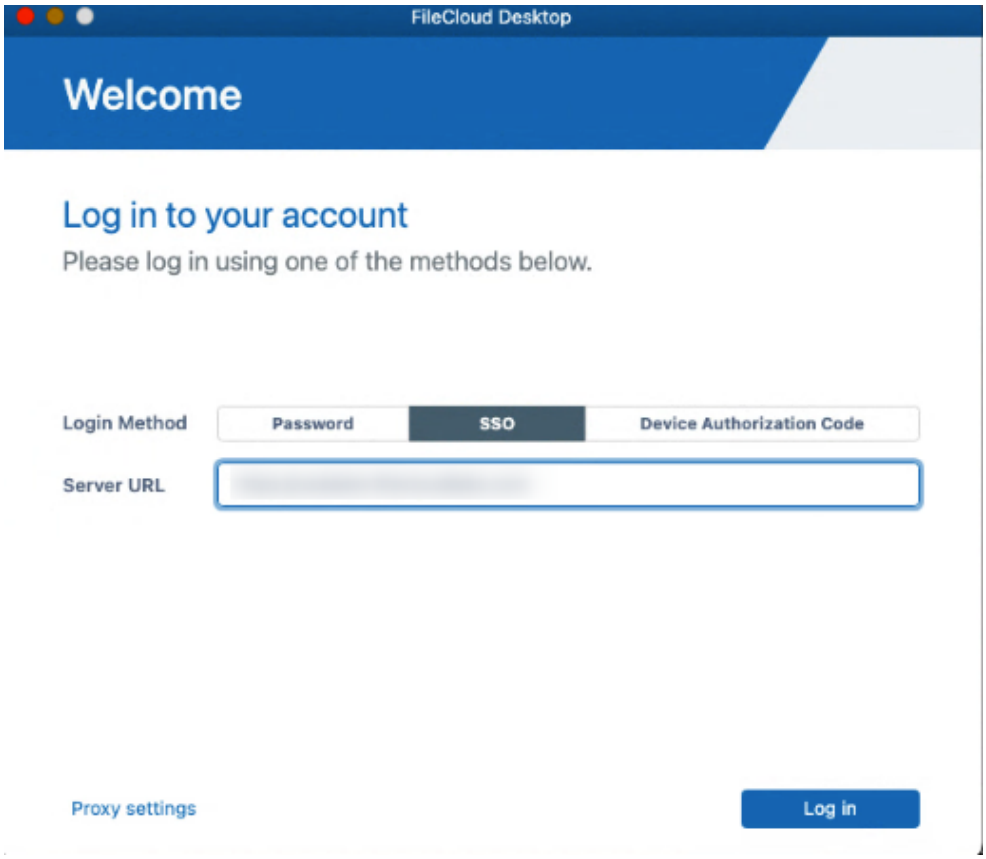
Log in with password

Leave **Password** selected for **Login Method**, and enter your **Server URL**, **Account Name** (username), and **Password** into the **Log in** screen, and click **Log in**:

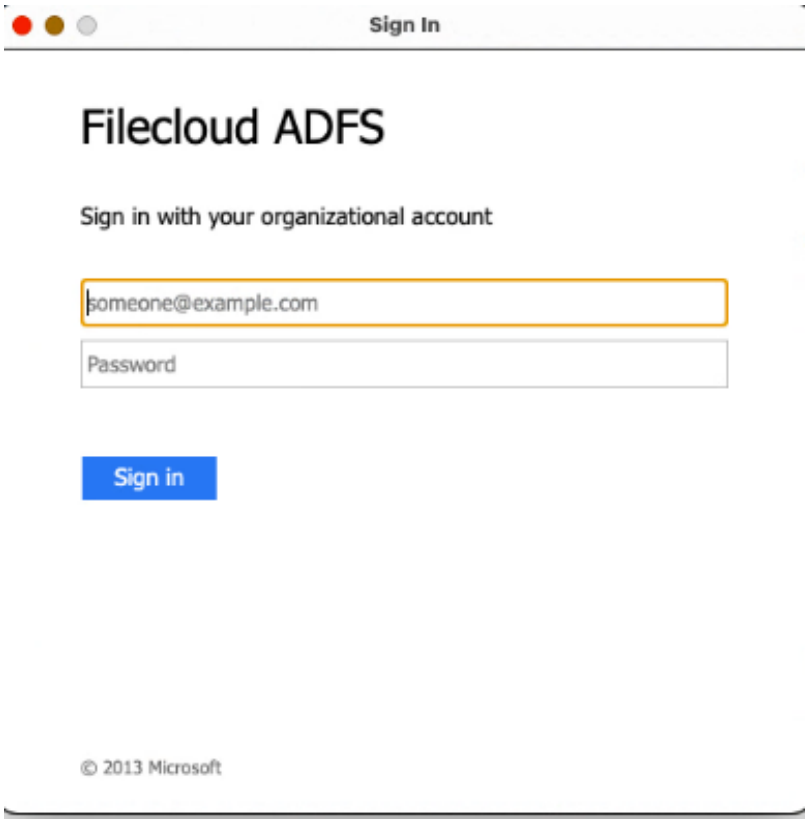


Log in with SSO

1. Select **SSO** for **Login Method**.
   The screen changes to:

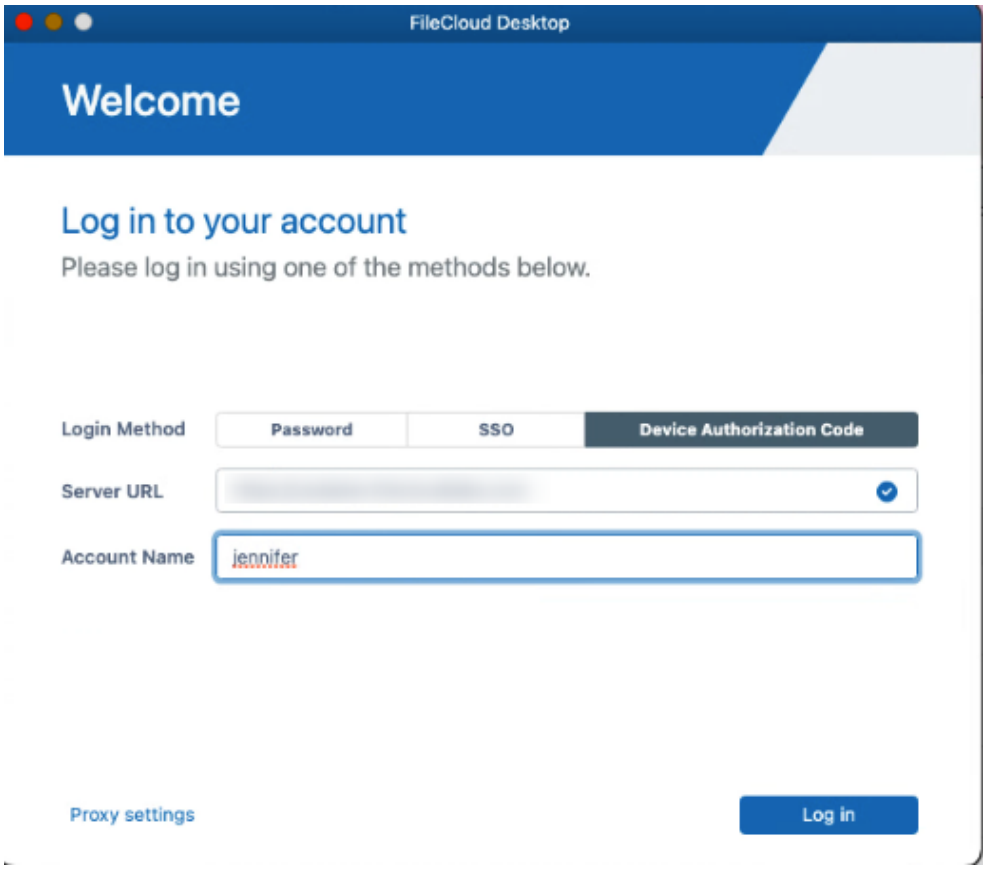


2. Type the address to the FileCloud server that was sent to you when your FileCloud account was created.
   You are redirected to the **SSO Login** page, where you can enter your username and SSO password to log in.

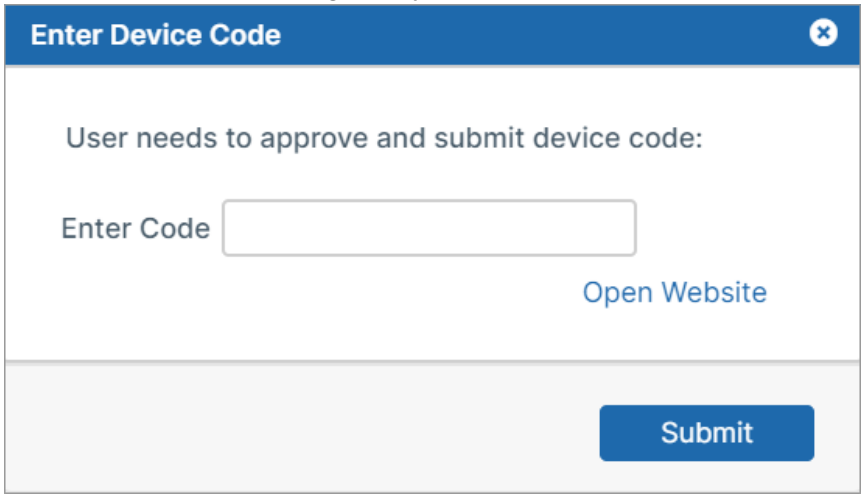


Log in with Device Authorization Code

1. Select **Device Authorization Code** for **Login Method**.
   The screen changes to:

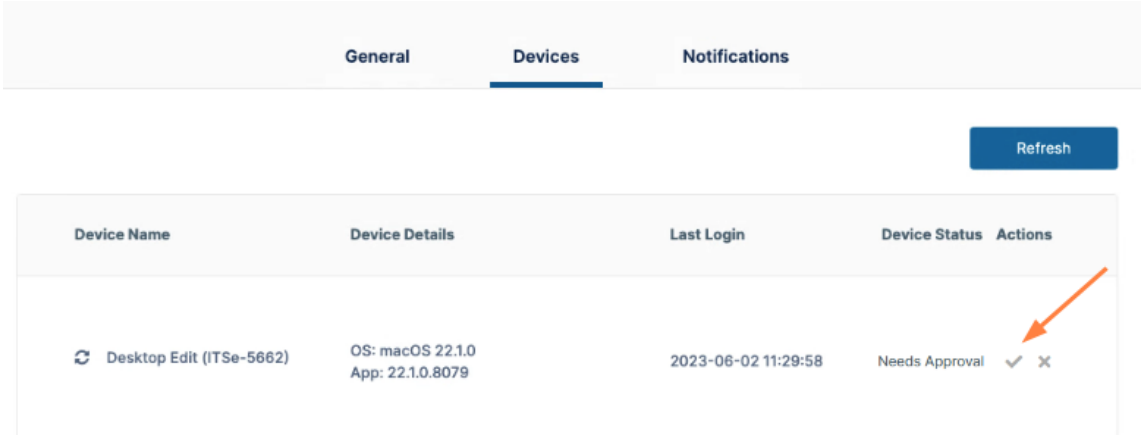


2. Enter your **Server URL** and **Account Name** (username).
   An **Enter Device Code** dialog box opens.



3. Click **Open Website**.
   The log-in screen of the user portal opens.
4. Log-in to the user portal.
5. In the upper-right corner of the screen, click your username and choose **Settings**.
6. In the **Settings** screen, click **Devices**.

7. Next to the listing for FileCloud Desktop, click the check.

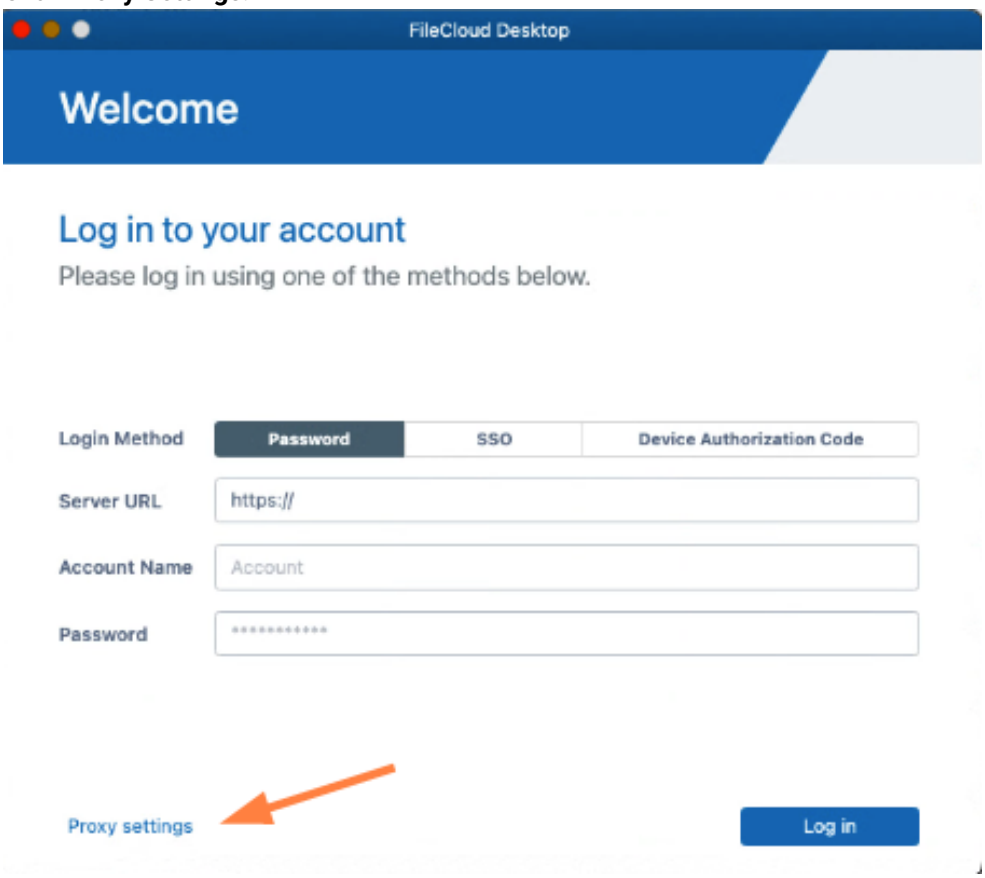


A dialog box with the device authentication code opens.

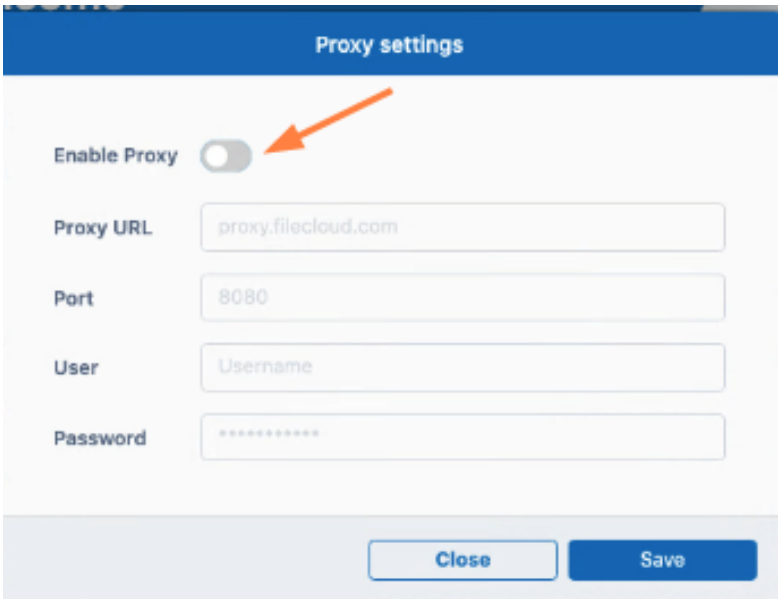
8. Enter the authentication code into the **Enter Device Code** dialog box, and click **Submit**.

Log in using Proxy Settings

1. Click **Proxy Settings**.



A dialog box with proxy settings opens:



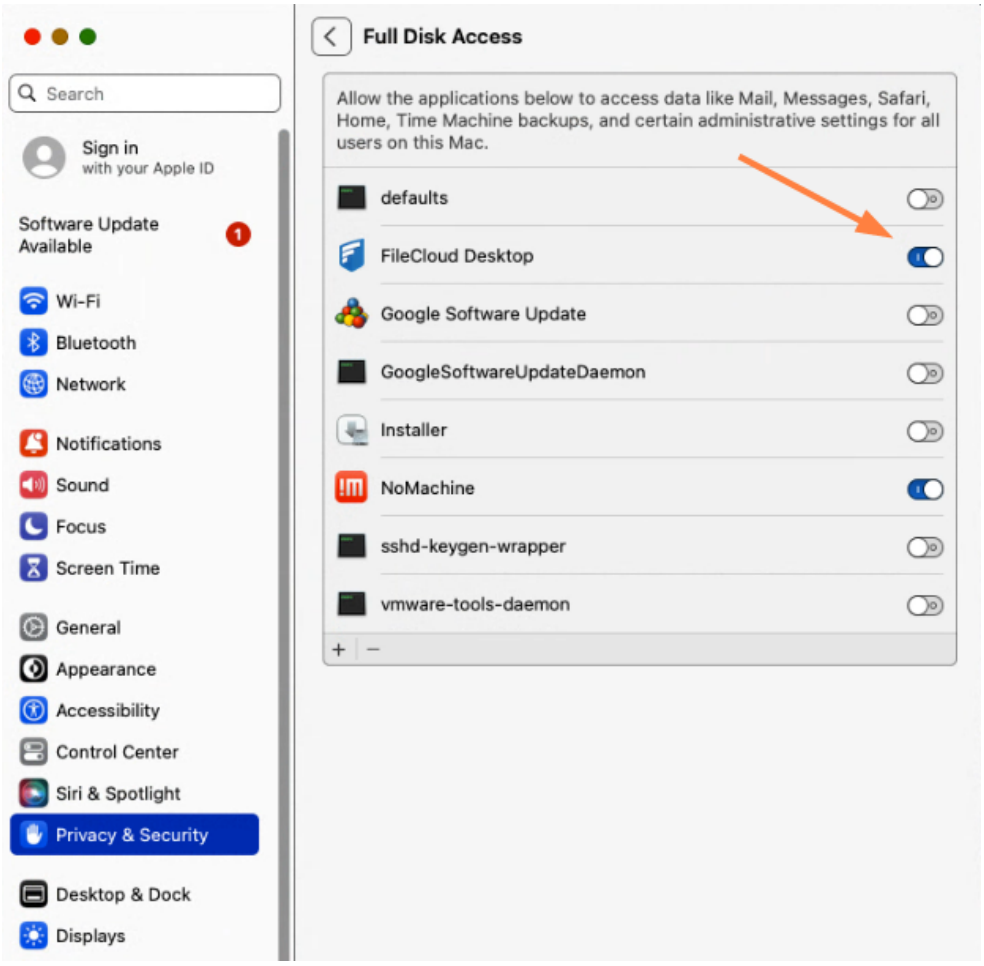
2. Click the **Enable Proxy** slider to enable use of proxy settings.
3. Fill in the proxy settings.
4. Save your changes.

Log in with MFA (multi-factor authentication)

If you have not yet set up MFA, you are prompted to set it up in the web browser.

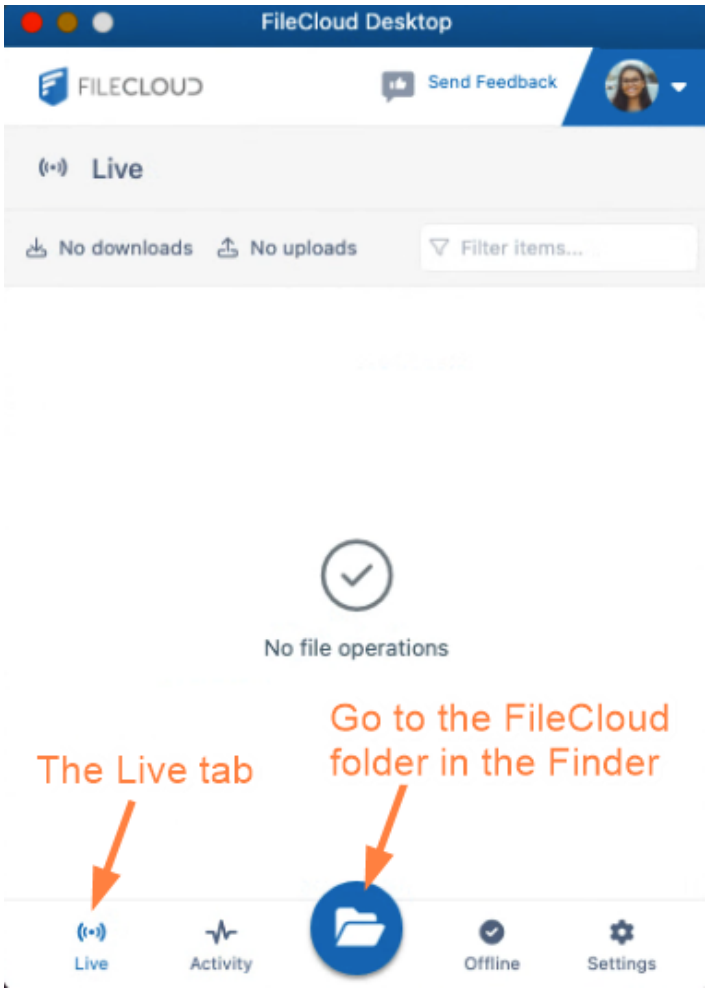
If you have set up MFA in the web browser, you are prompted to login in with the MFA method or default MFA method you have chosen.
See Log in Using Multi-Factor Authentication for help setting up and logging in with MFA.

The first time you log in, you may be prompted to give **FileCloud Desktop** full disk access.
Follow the prompts to go to **Settings > Privacy and Security > Full Disk Access** and enable **Full Disk Access** for **FileCloud Desktop**.



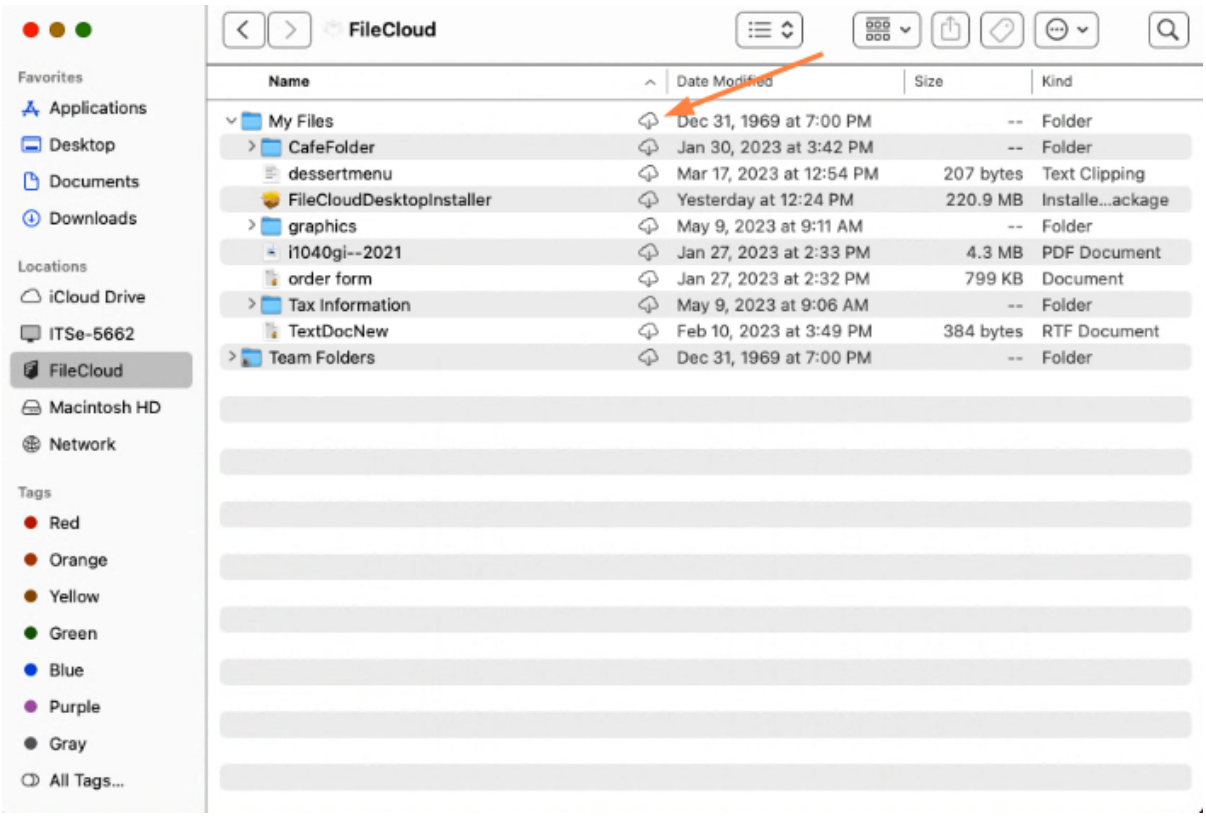
Once that is configured, login moves through a few screens introducing you to FileCloud Desktop, and then opens the FileCloud Desktop dashboard.
The dashboard opens to the **Live** screen. FileCloud Desktop cannot begin tracking and synchronizing online and offline FileCloud file activity until you download FileCloud folders and files to your local drive. So initially, the **Live** tab appears empty.
Click the folder icon at the bottom of the FileCloud Desktop dashboard to view the FileCloud folder,

which now appears under **Locations** in your finder.



If this is the first time you have logged in to FileCloud Desktop, each file and folder should appear with a cloud icon next to it, which indicates that it hasn't been downloaded locally (made available offline)

yet.

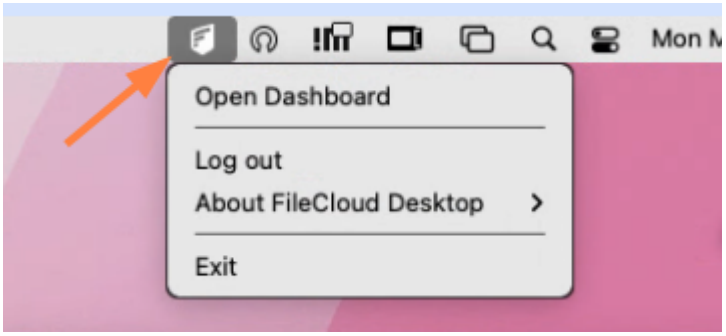


Begin setting up FileCloud Desktop by making FileCloud files and folders available offline.

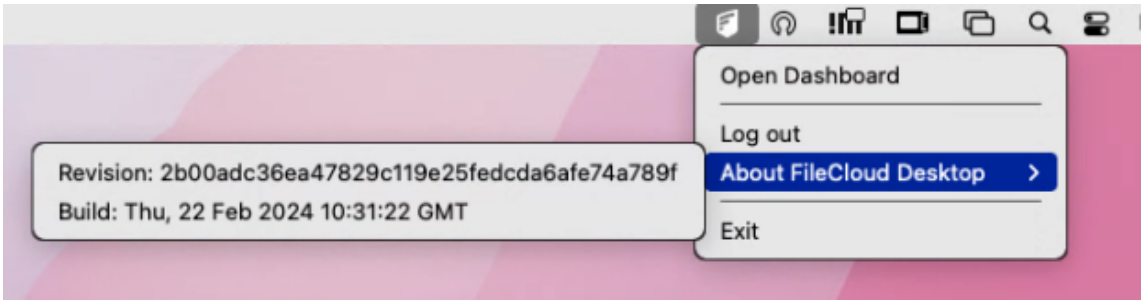
For more information about the dashboard, see Using the Dashboard in FileCloud Desktop for macOS.

Working from the FileCloud Desktop for macOS Menu Bar Icon

After you login in to FileCloud Desktop for macOS, a FileCloud icon appears in the taskbar. Click the icon to perform FileCloud Desktop tasks.



- **Open Dashboard** - Opens the FileCloud Desktop for macOS dashboard.
- **Log out** - Logs the currently logged in user out of FileCloud Desktop for macOS without shutting down the application.
- **About FileCloud Desktop** - Shows details about the FileCloud Desktop build:



- **Exit** - Closes the FileCloud Desktop for macOS application.

Sync indicator

To indicate that FileCloud Desktop is currently syncing, the FileCloud icon displays rotating arrows:



On file conflict

If there is an existing file conflict, an additional task is listed:

- **Show Conflicts**

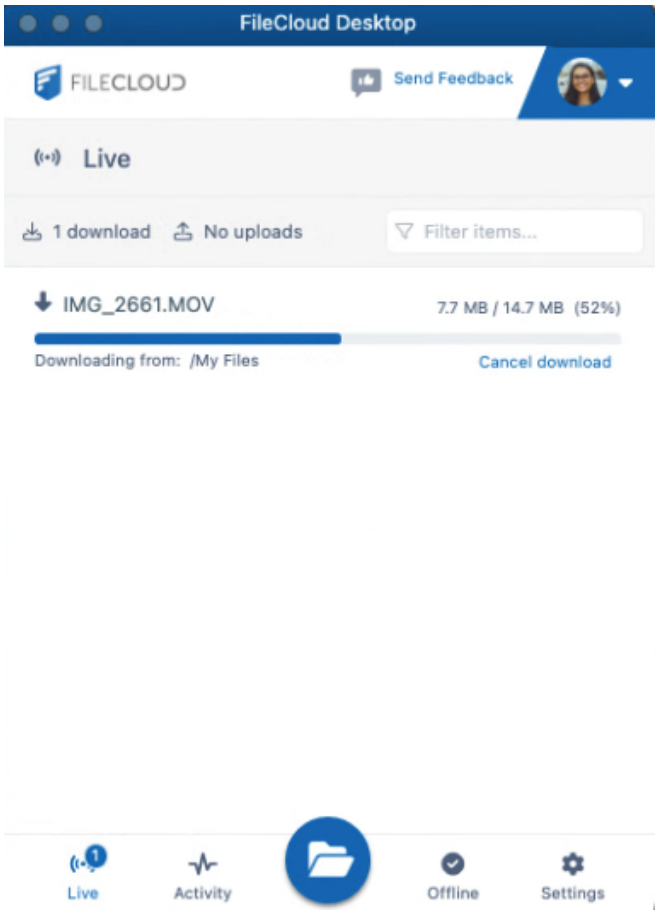
Clicking on it takes you to the Recent Activity tab in the dashboard where the conflict is listed. See How FileCloud Desktop for macOS handles change conflicts for more information about file conflicts.

Using the Dashboard in FileCloud Desktop for macOS

FileCloud Desktop for macOS opens to its dashboard, which has the tabs **Live**, **Activity**, **Offline**, and **Settings**, and a button for opening your FileCloud website (in the user portal).

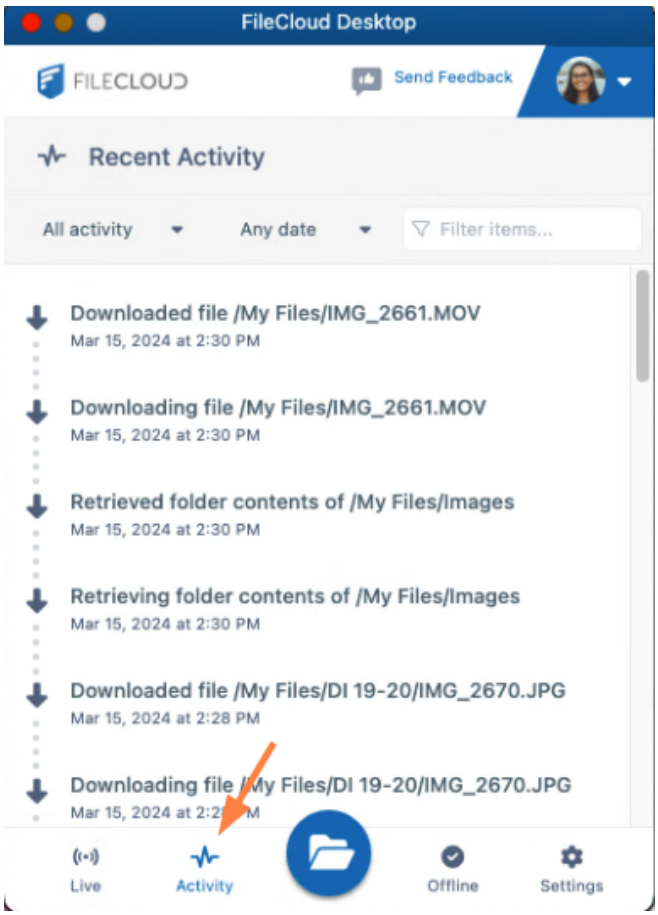
Live tab

The dashboard opens to the **Live** tab, which displays a list of recently accessed files and folders:



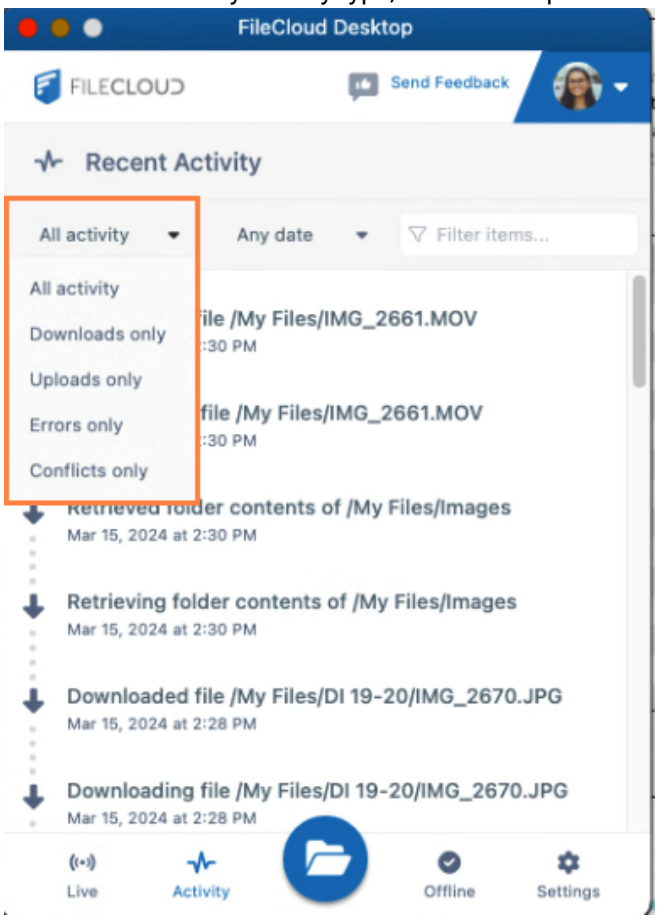
- To search for a file or folder in the list, enter a string from its name into the **Filter items** box.

Activity tab
To view a list of recent FileCloud Desktop activities, click the **Activity** tab:

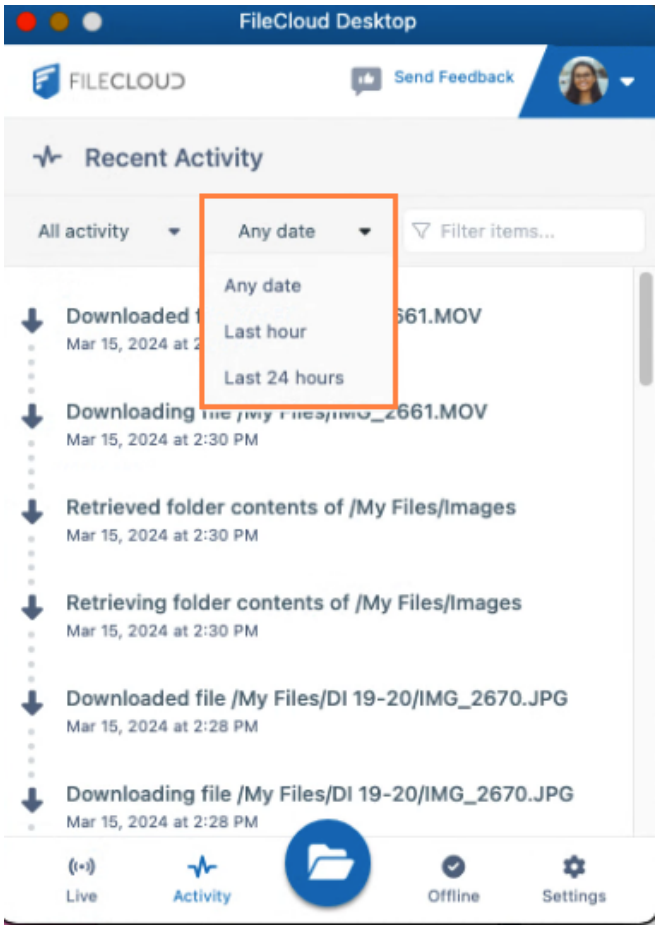


To filter activities on the Activity tab

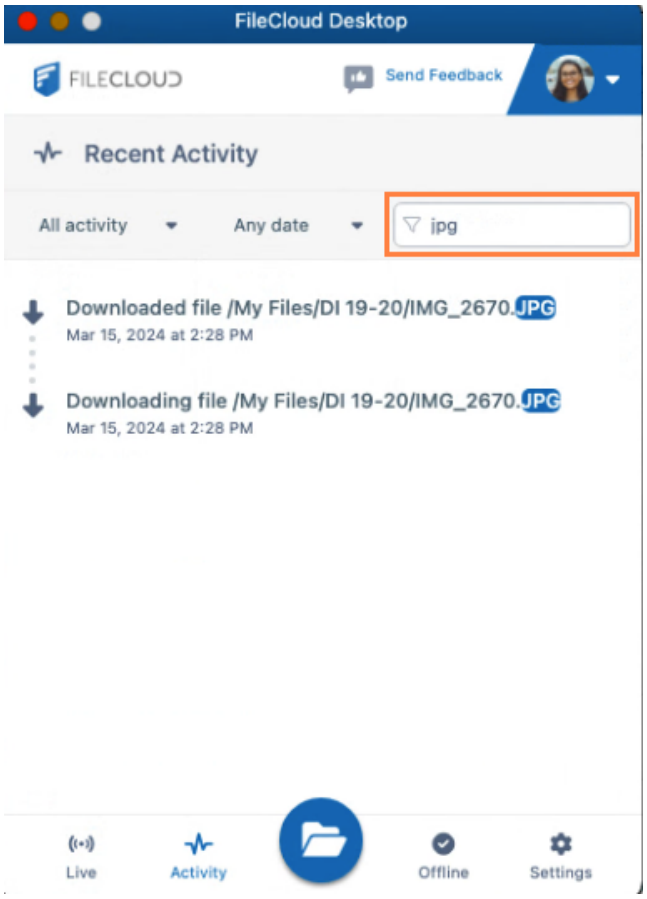
- To filter activities by activity type, choose an option in the Activity drop-down list.



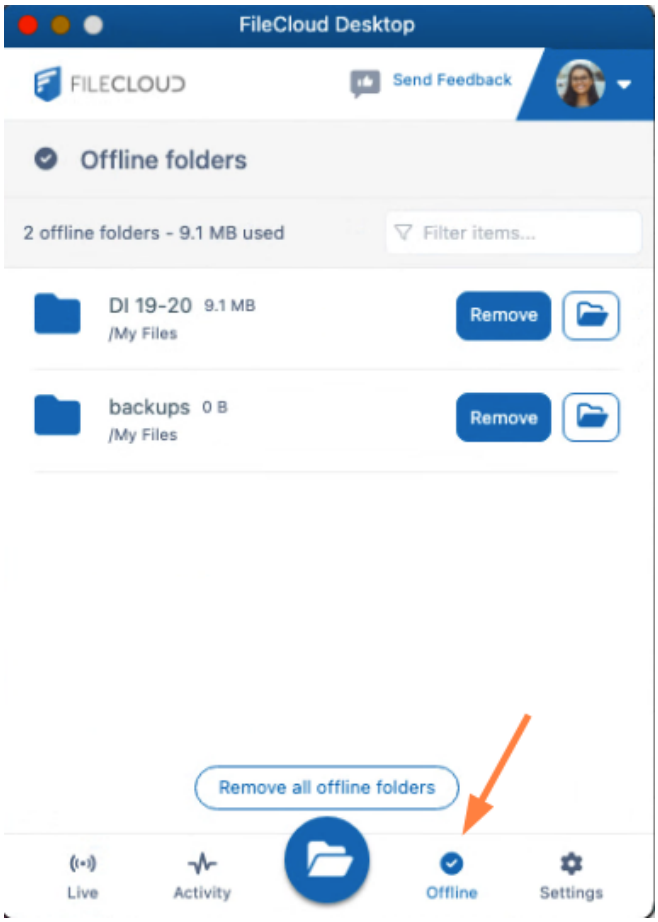
- To filter activities by date, choose **Any date**, **Last hour**, or **Last 24 hours** in the Date drop-down list.



- To filter by any string in the listing (including the action, file path, date, or time) enter the string into **Filter items**.

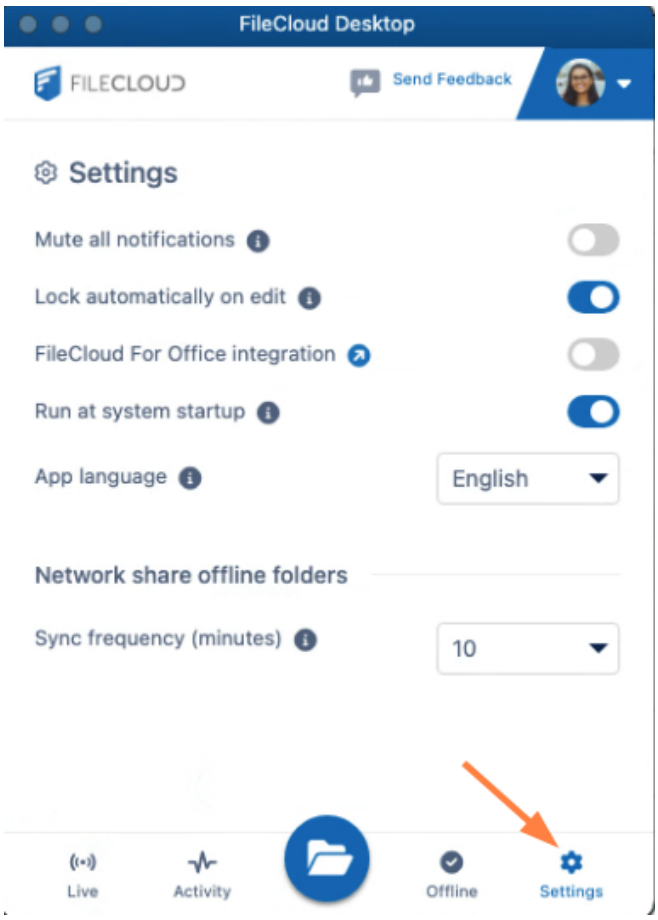

FileCloud Desktop
FILECLOUD
Send Feedback
Recent Activity
All activity
Any date
jpg
Downloaded file /My Files/DI 19-20/IMG_2670.JPG
Mar 15, 2024 at 2:28 PM
Downloading file /My Files/DI 19-20/IMG_2670.JPG
Mar 15, 2024 at 2:28 PM
Live
Activity
Offline
Settings

Offline tab
To view folders that you have moved offline using FileCloud Desktop, click the **Offline** tab.



- To remove folders from the offline location from the **Offline** tab, see Remove Files from Offline Folders.
- To open an offline folder in its location in the Finder, click the folder icon next to it.

Settings tab
To view FileCloud Desktop for macOS settings, click the **Settings** tab.

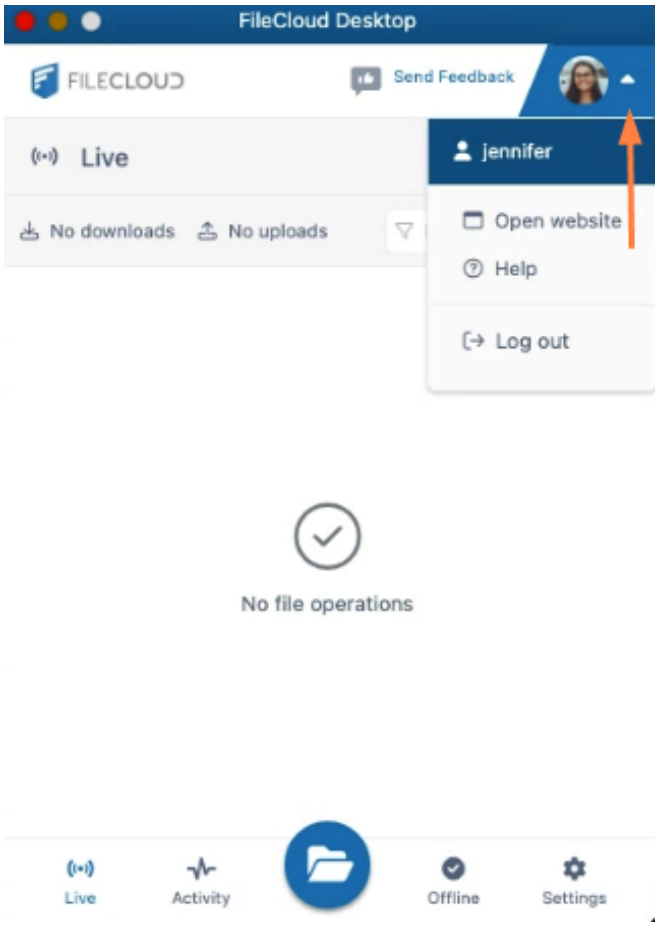


For information about FileCloud Desktop settings, see FileCloud Desktop Settings.

More Options

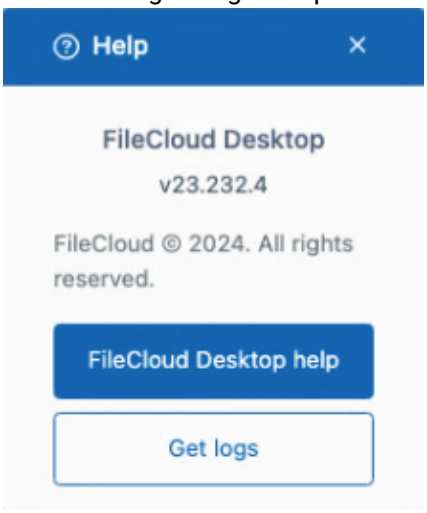
To access more options from the FileCloud Desktop for macOS dashboard, click the down arrow next

to your username:



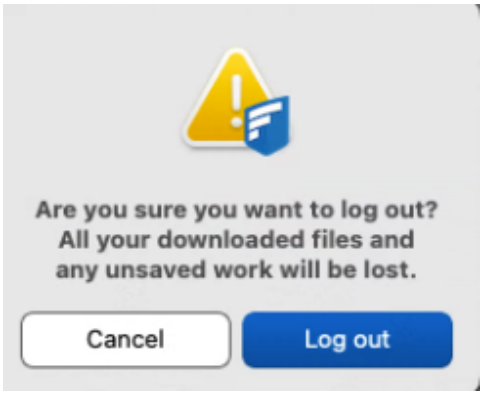
- To open your FileCloud user portal, click **Open website**.
- For this end user help and log files, as well as the version of FileCloud Desktop for macOS that you are running click **Help**.

The following dialog box opens:



- Click **FileCloud Desktop help** to access this end user help.
- Click **Get logs** to open the Finder to the Logs folder, where you can access your FileCloud Desktop for macOS log files.

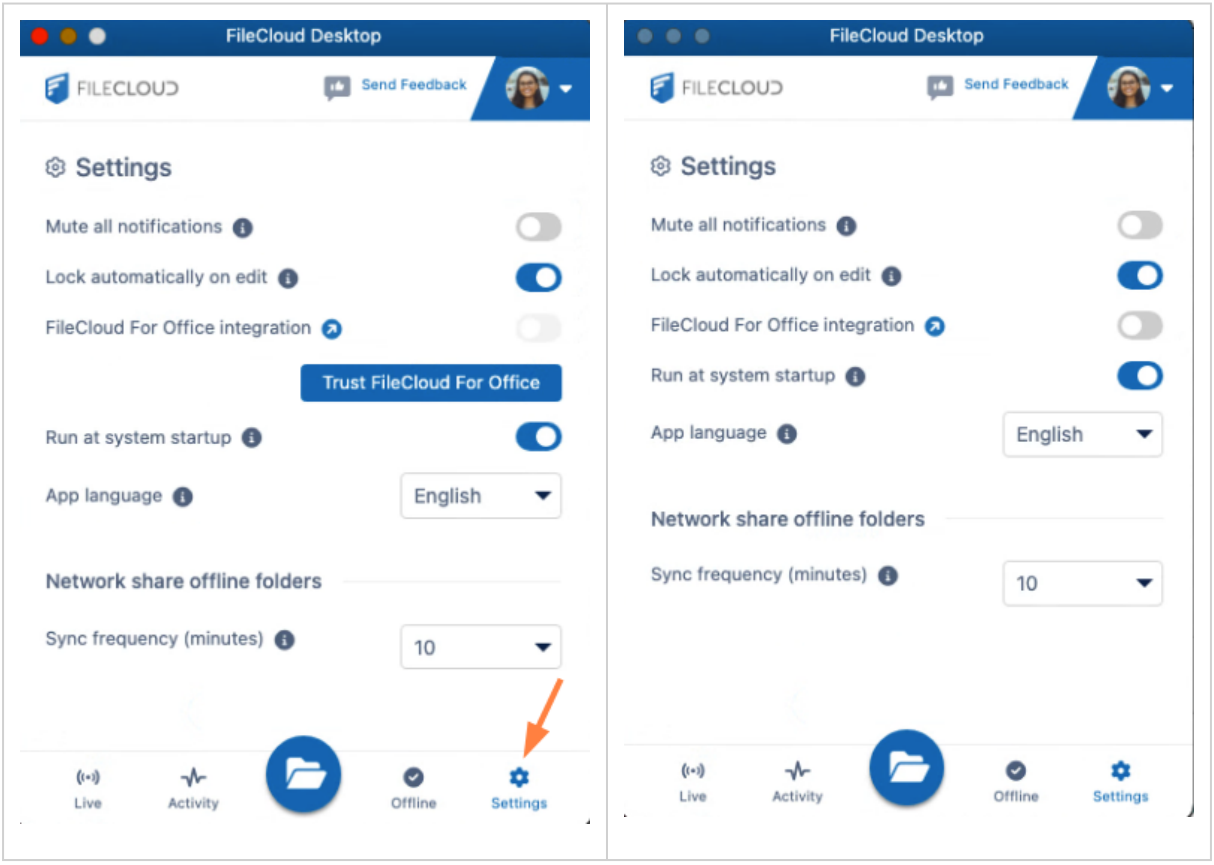
- To log out of FileCloud Desktop for macOS, click **Log out**.
  You are warned that:



  This means that in addition to logging you out, FileCloud Desktop clears and removes the FileCloud folder that appears in the Finder.

FileCloud Desktop Settings

To change your settings in FileCloud Desktop, click the **Settings** tab at the bottom of the dashboard.



Setting	Description	
Mute all notifications	When enabled, all notifications sent from FileCloud Desktop are turned off. Default is **disabled**.	
Lock automatically on edit	When enabled, files opened for edit through FileCloud Desktop are locked, and other users cannot edit them. When the files are closed they are unlocked again. Default is **enabled**.	
FileCloud For Office Integration/ Trust FileCloud for Office	FileCloud for Office is an add-in that allows users to automatically: • Lock Office files when they open them • Share Office files while working with them in FileCloud clients When you initially install FileCloud Desktop, the **Trust FileCloud for Office** button appears. Click it to use FileCloud for Office. After you click the button, it disappears. The **FileCloud For Office Integration** setting remains disabled until you enable it.	
Run at system startup	When enabled, begin running FileCloud Desktop when the system starts. Default is **enabled**.	

Setting	Description	
App language	User interface language. Change to any of the language options. Default is **English**.	
Network share offline folders Sync frequency (minutes)	Interval between automatic sync events for Network Folders. Choose any interval in the drop-down list. Default is **10** minutes. **Note**: Most FileCloud Online systems do not include Network Folders.	

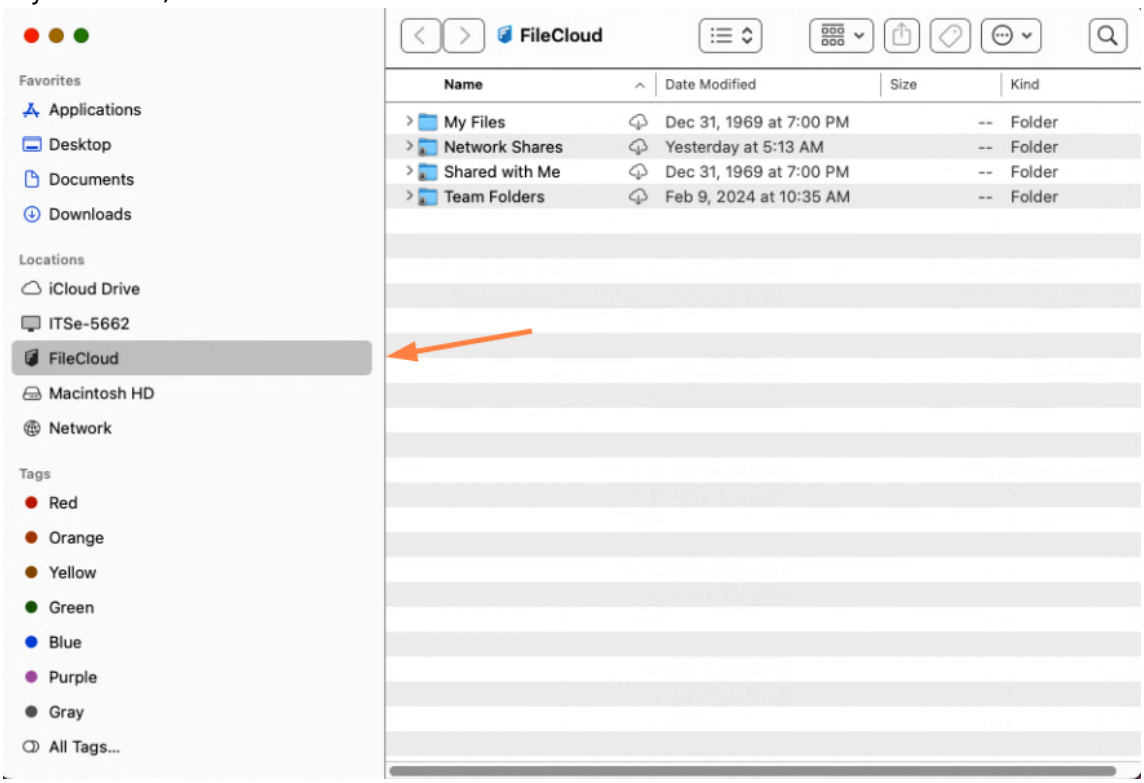
Make Files and Folders Available Offline

To use FileCloud Desktop for macOS to synchronize offline and online changes you make to FileCloud files and folders, first download the folders with contents that you want to synchronize.

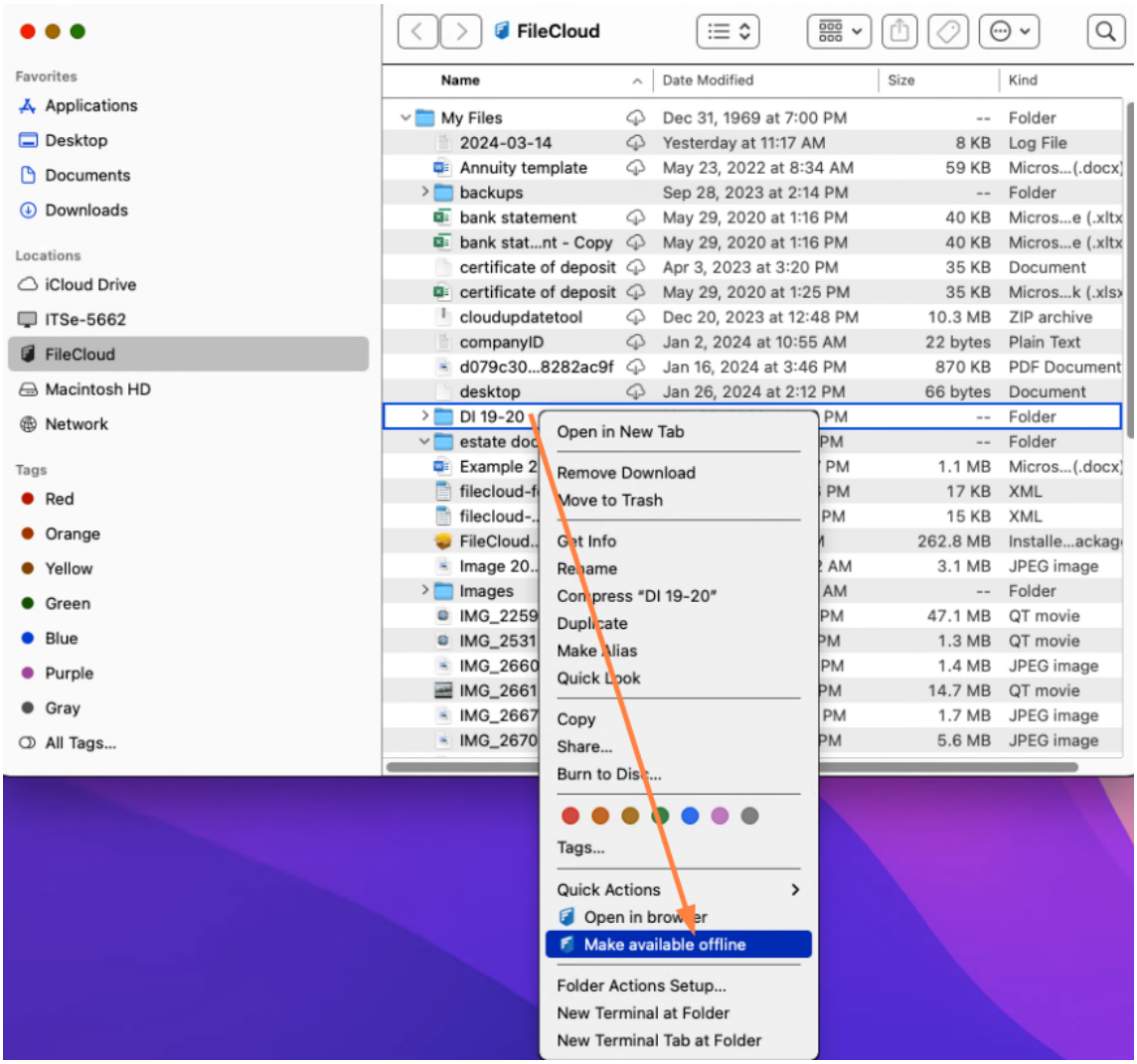
When you log in to FileCloud Desktop, your FileCloud folders become available in your Finder in a **FileCloud** folder:

To mark files and folders Available Offline:

1. In your Finder, click the FileCloud folder.

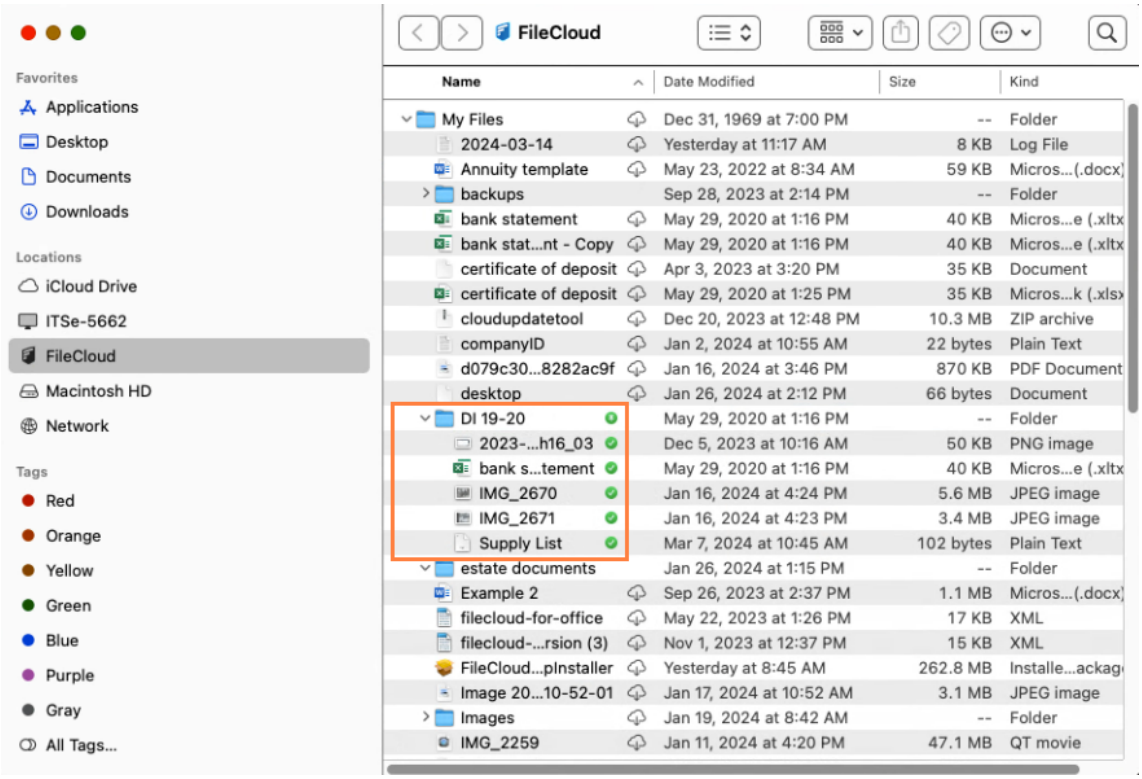


2. Right-click on each folder with contents that you want to be able to synchronize, and choose **Quick Actions > Make available offline**.



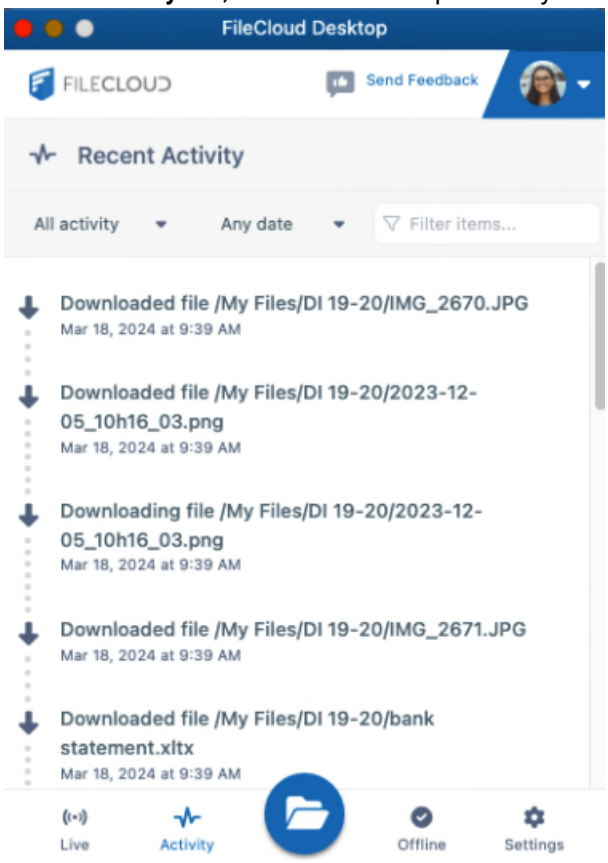
FileCloud downloads the folders and their contents to your local drive (and moves them into its offline folder), and replaces the cloud icon with a green icon to indicate that they are available for synchronization with FileCloud Desktop.

Note: If you click **Download Now** next to a file or folder you can edit it offline, but it is not in a FileCloud offline folder, and its changes aren't synced with FileCloud. Files downloaded with **Download Now** do not display an icon (neither the cloud icon nor the green icon) next to them. You are still able to choose **Make available offline** for the folder to put it into an FileCloud offline folder that will sync with FileCloud.

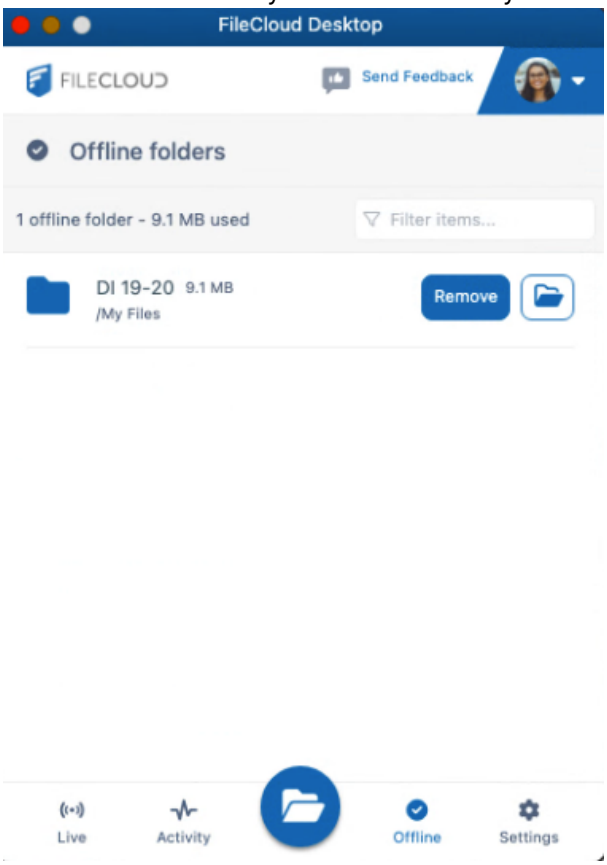


FileCloud Desktop's dashboard shows you the progress of the files being downloaded on the **Live** tab. These disappear as soon as download is complete.

On the **Activity** tab, FileCloud Desktop shows you the download actions for the same files.



The Offline tab shows you the folders that you have just made available offline:

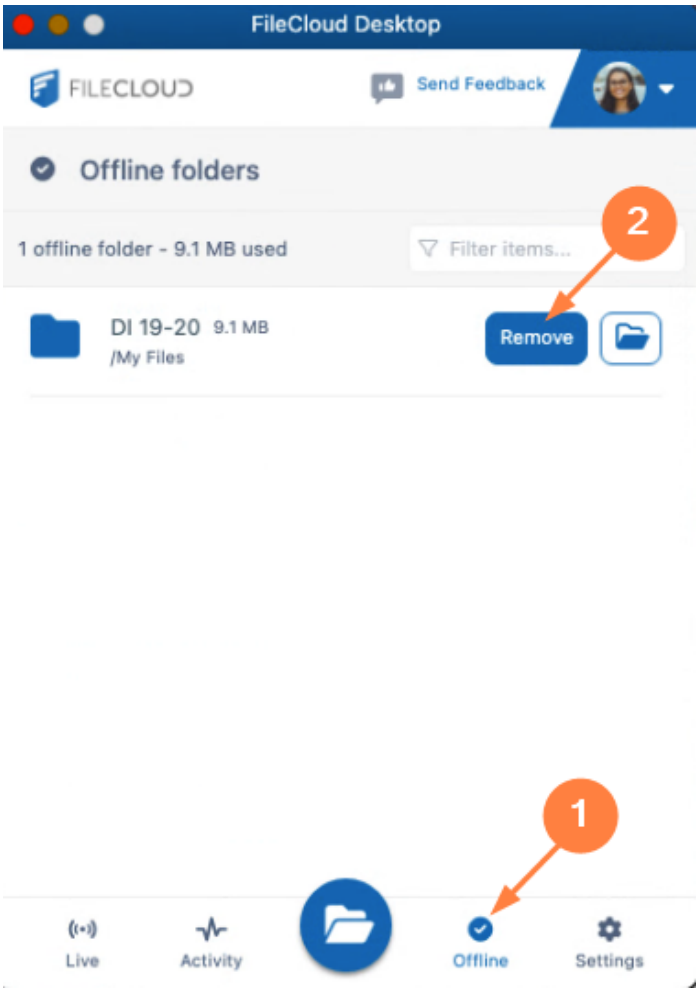


Remove Files from Offline Folders

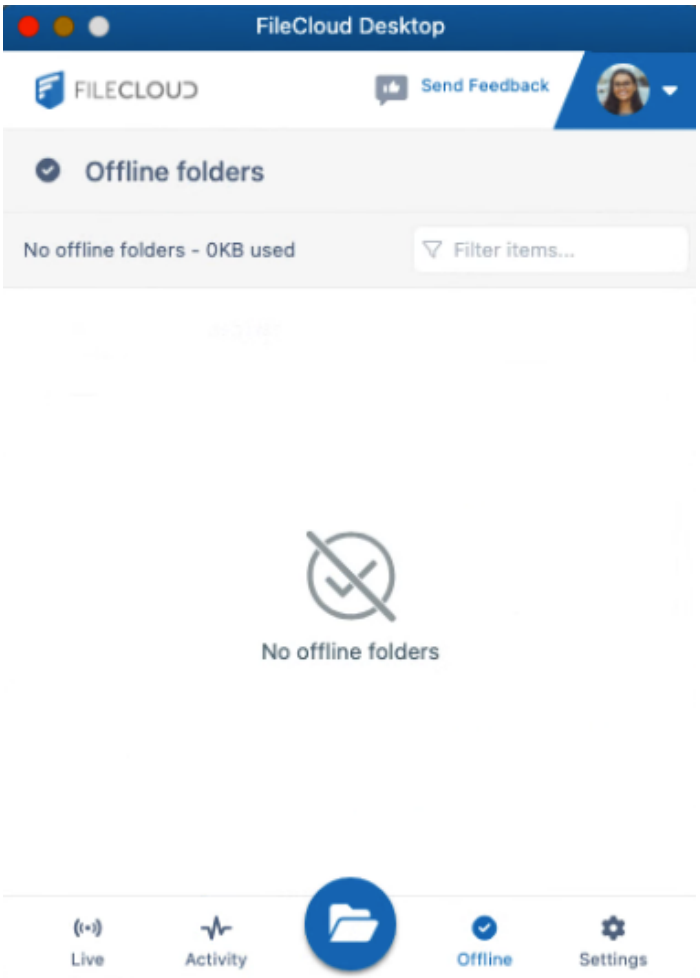
You can remove a file's ability to be edited offline by removing it from the offline folder, either through the FileCloud Desktop dashboard or through your Finder.

To remove a file from the offline folder through the FileCloud Desktop dashboard:

1. In the FileCloud Desktop dashboard, click the **Offline** tab.
2. Click the **Remove** button next to the file that you want to remove from the Offline folder.

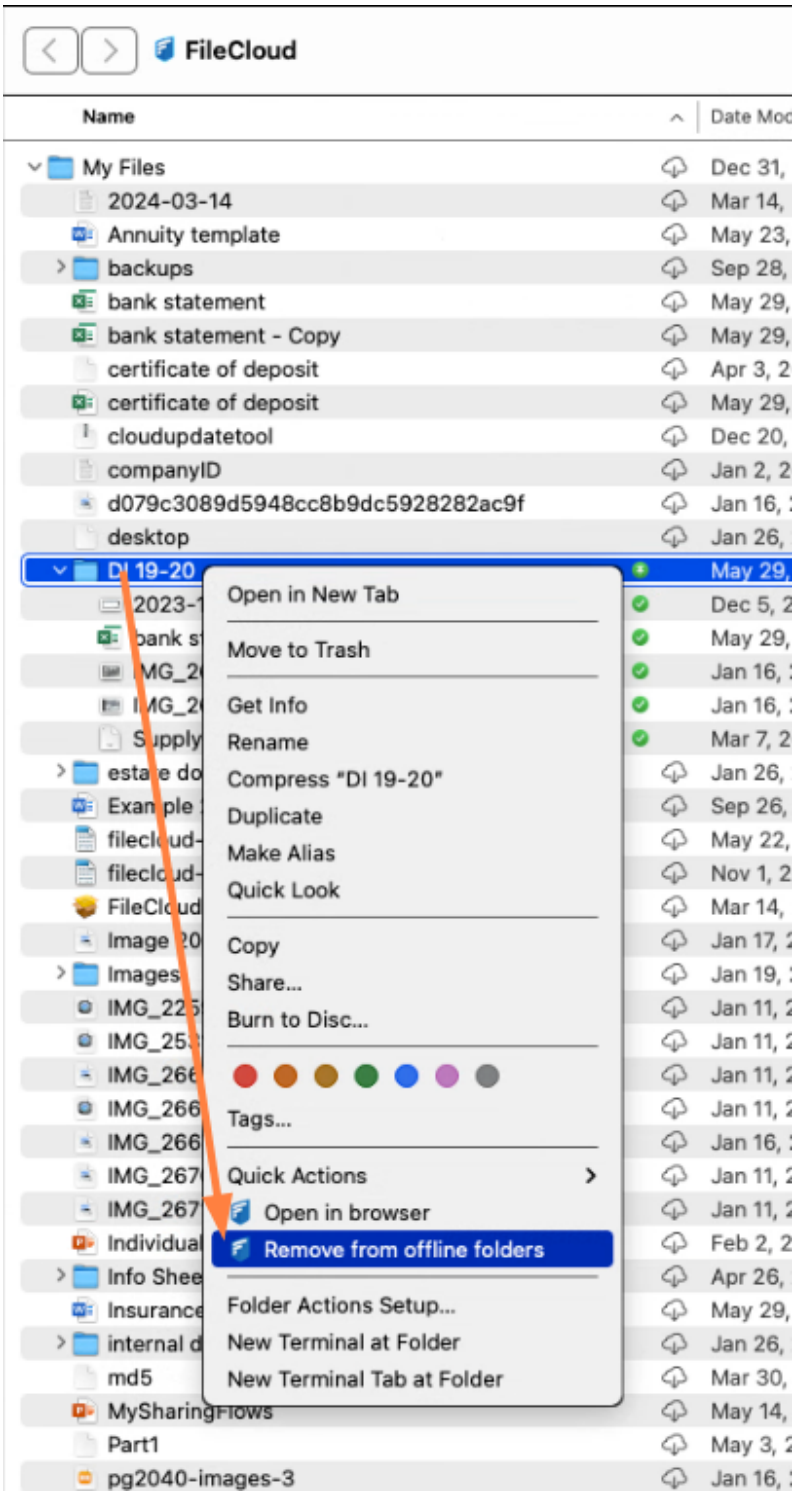


The file is no longer available offline. It no longer appears on the Offline tab of the FileCloud Desktop dashboard and the offline icon no longer appears next to it in the Finder.

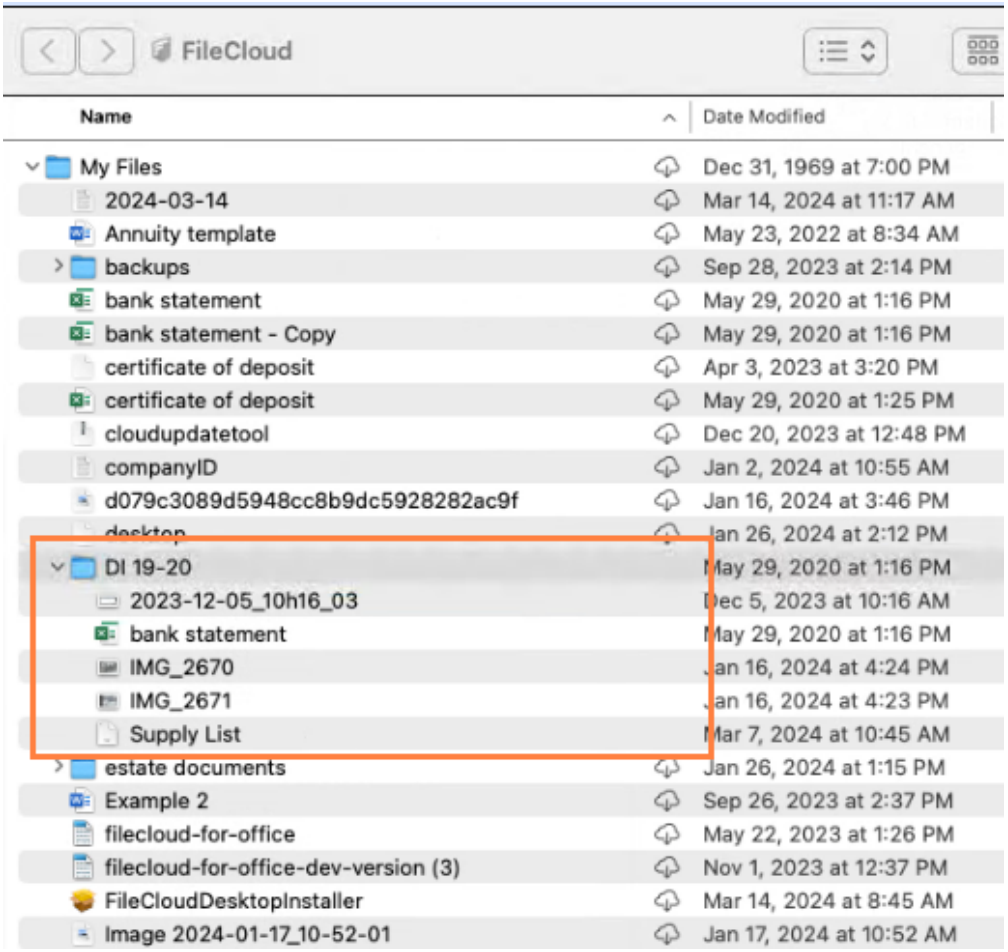


To remove a file from the offline folder through the Finder:

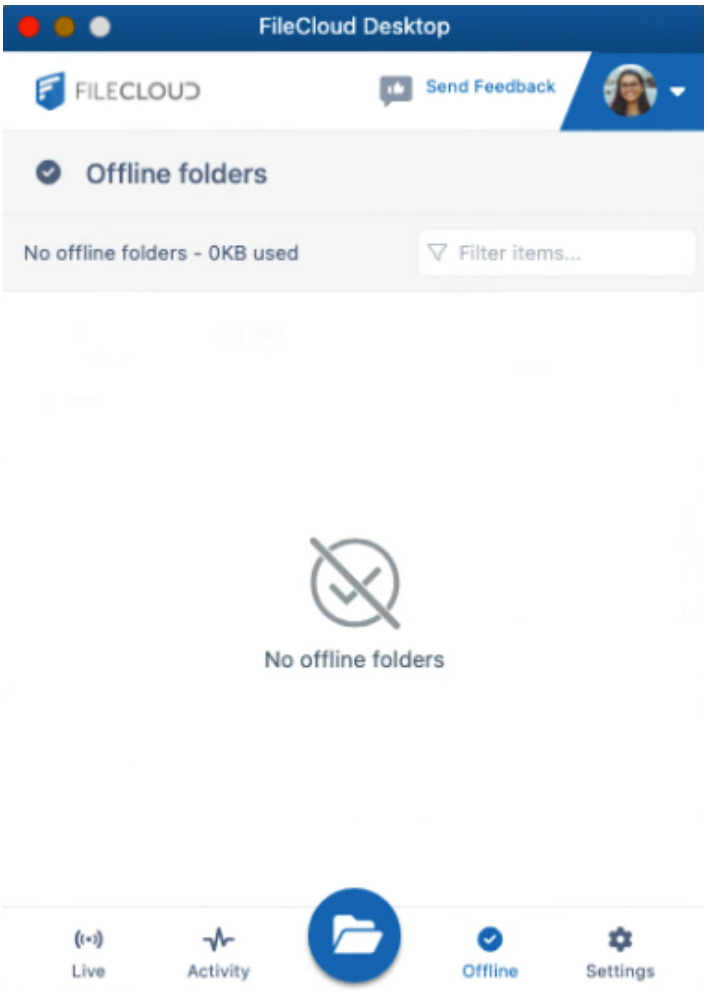
1. In the Finder, right-click on the file (it should have a green icon next to it).
2. In the drop-down list, click **Remove from offline folders**.



The green icons no longer appear next to the folder or its contents.



The file is no longer listed on the **Offline** tab of the FileCloud Desktop dashboard.

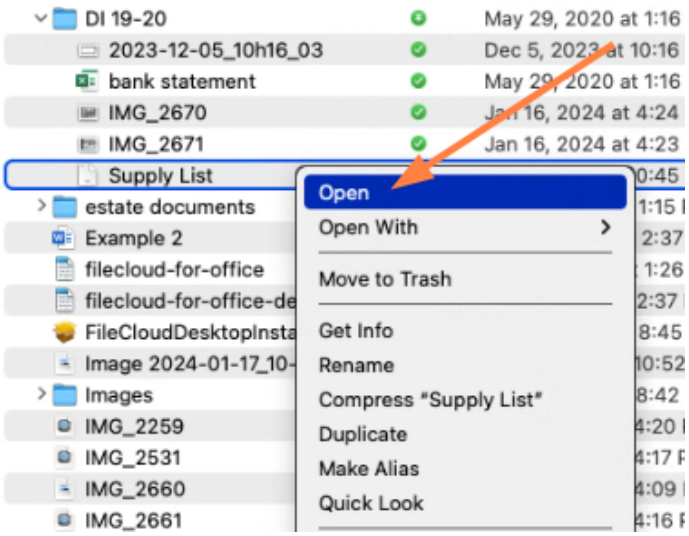


Working with Offline Files from FileCloud Desktop for macOS

After you make files and folders available offline, you can perform any of the regular Finder actions on them, and the changes are synchronized with the copies in FileCloud when you go back online.

For example, in the following procedure, a downloaded file is edited from the Finder while the user is offline. When the user goes back online, the **Activities** tab of FileCloud Desktop lists the action as a modification of the file, and the **Live** tab of FileCloud Desktop shows an upload.

1. In the Finder, while you are offline, right-click on an offline file (a file with a green circular icon) and choose **Open** or **Open with**.

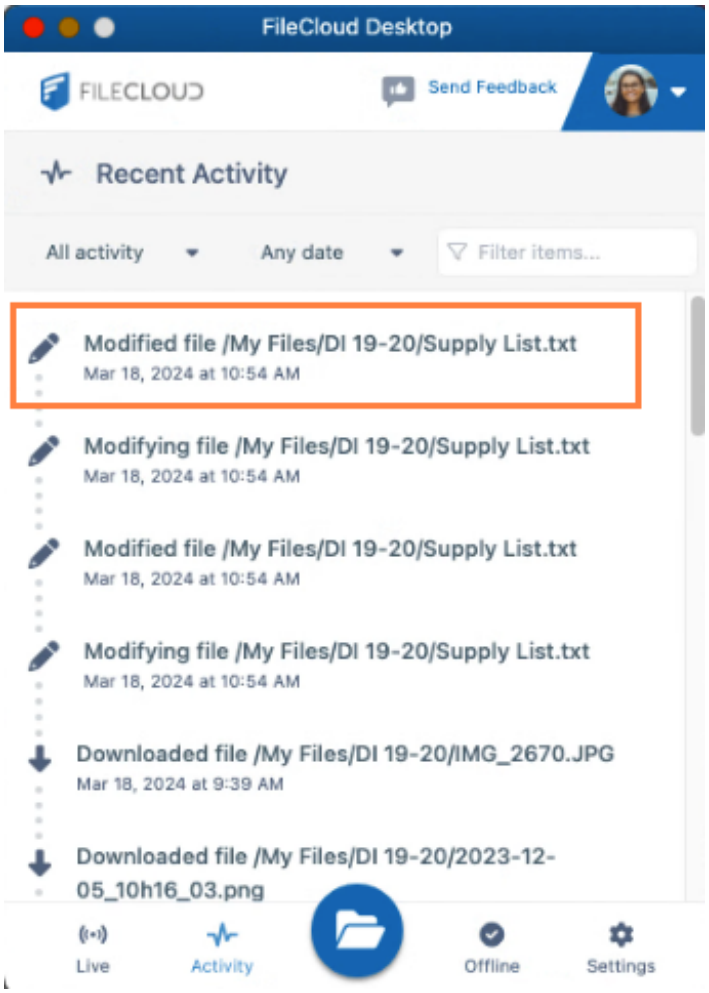


The file opens in the default or selected application.

2. Make edits to the file.

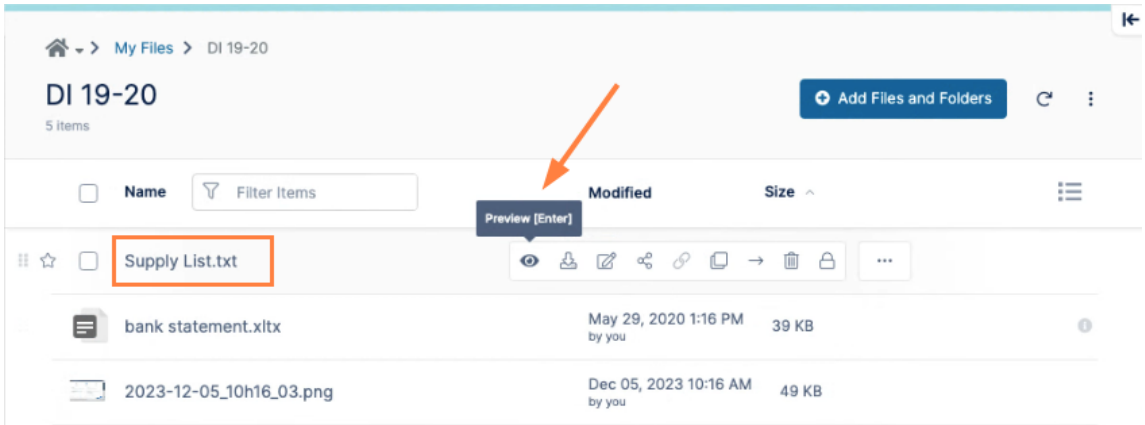


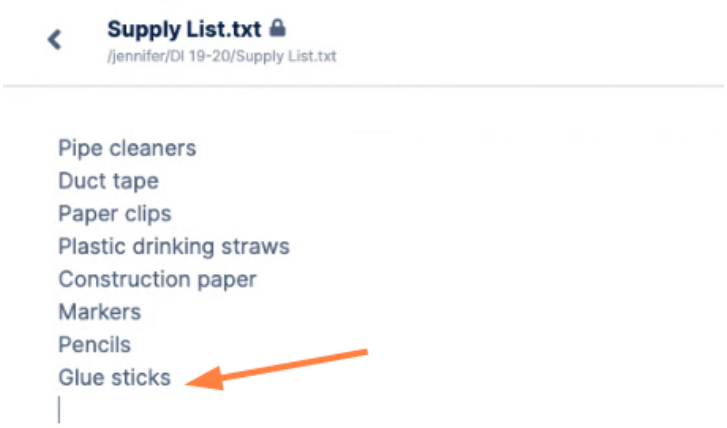
3. Save your edits, and close the file.
4. Go back online.
5. Click the **Activities** tab in FileCloud Desktop.
   The latest activity listing indicates that the file has been modified.



In addition, the modified file is synced with FileCloud (uploaded to FileCloud) and replaces the original file in FileCloud, so that the edited file is now the same offline and online.

6. If you want to confirm that the file has been synchronized, open or preview the file in FileCloud and check its contents.





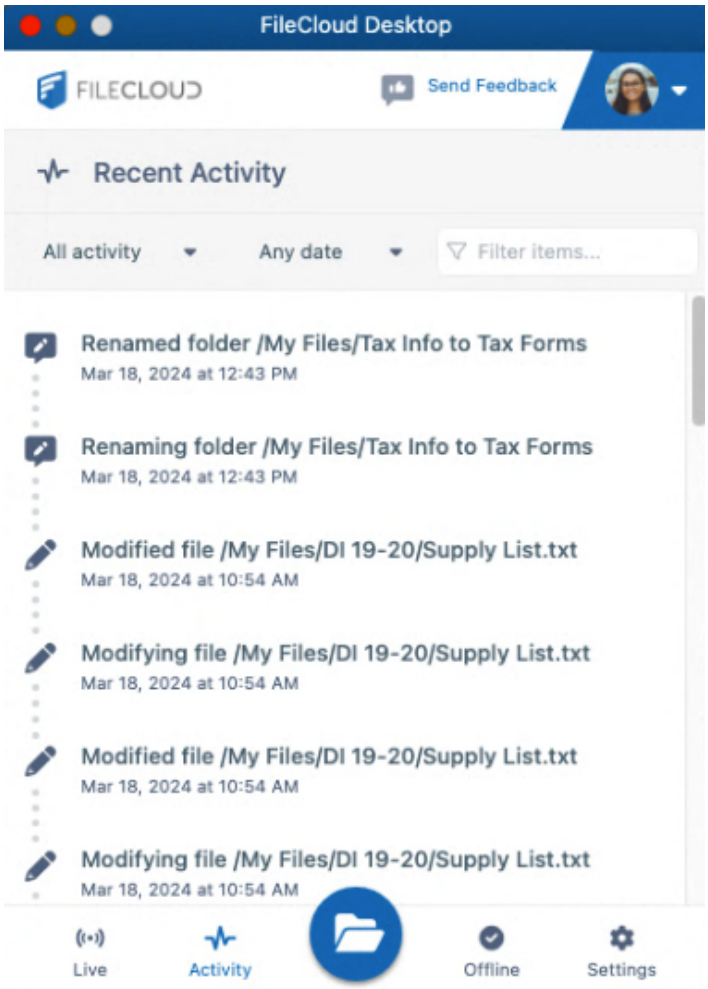
Working with Online Files in FileCloud Desktop for macOS

In the FileCloud Desktop folder in your Finder, any file or folder with a cloud next to it is online in FileCloud; when you edit or otherwise modify the file or folder from the Finder, you are actually modifying it in FileCloud, and the changes appear immediately in the files in the FileCloud user portal and other clients.

You can see this in the following video, which shows the online FileCloud files in the Finder and in the FileCloud user portal side by side. The file is renamed from **Tax Info** to **Tax Forms** in the Finder, and as soon as the user portal is refreshed, the change appears there as well. No sync action is needed.
https://www.youtube.com/embed/CRAOKrzsKu4?si=IyC467hDBF9K40D7

In the **Activity** tab of the FileCloud Desktop dashboard, you can see actions for renaming the folder **Tax Info**

to **Tax Forms**:



The same is true if you edit, delete, create, or copy a file in either interface. It appears almost immediately on the other. (You can check the **Activity** tab to monitor when syncing has occurred.) The following example shows how a file created in the FileCloud user portal automatically appears in the online folder in the Finder:

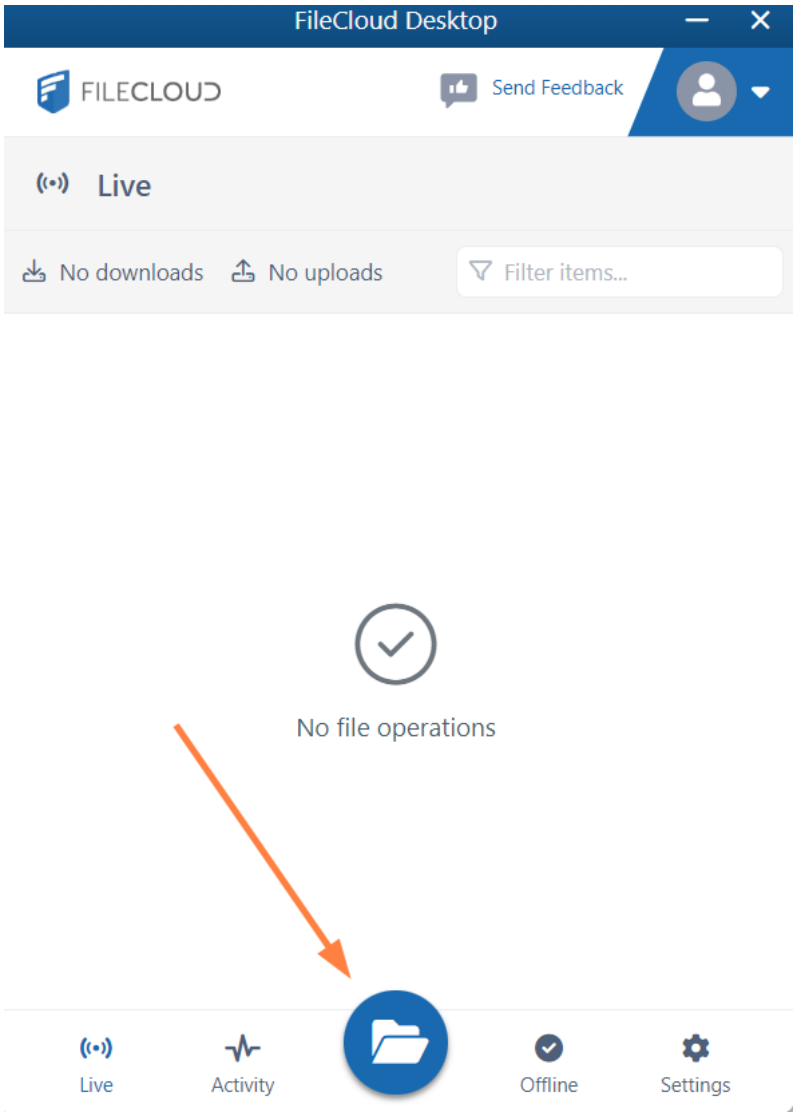


Sharing Files and Folders in FileCloud Desktop for macOS

You can share a file or folder in FileCloud from the FileCloud Desktop for macOS folder in File Explorer.

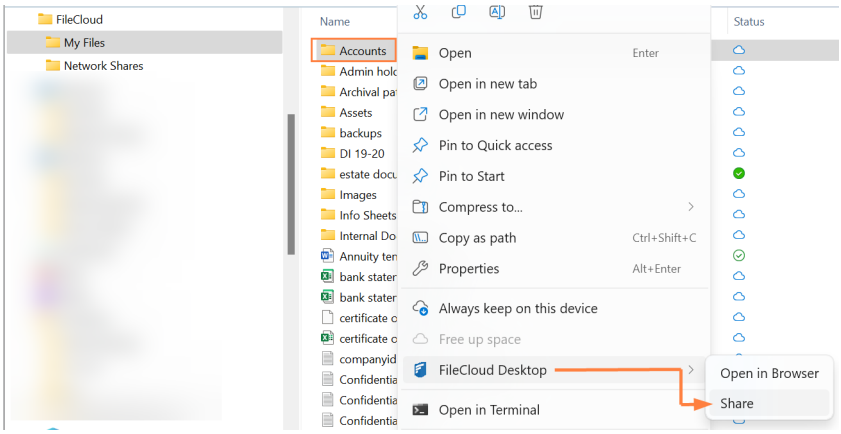
To share a file or folder:

1. In the FileCloud Desktop dashboard, click the folder icon.

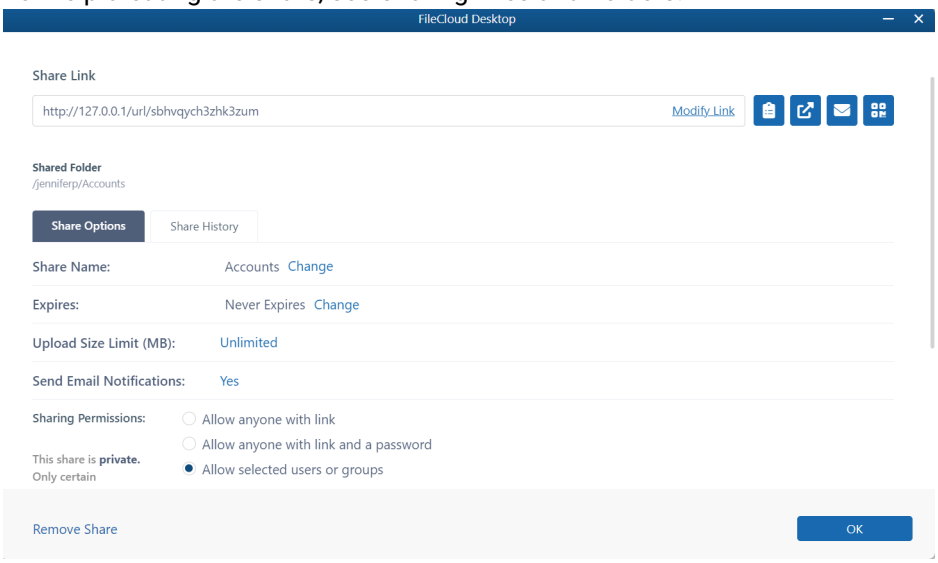


File Explorer opens to the FileCloud folder that you are logged in to in FileCloud Desktop.

2. Navigate to the file or folder that you want to share and right-click it.
3. In the menu, choose **FileCloud Desktop > Share**.



A FileCloud **Share Link** dialog box opens.
For help creating the share, see Sharing Files and Folders.

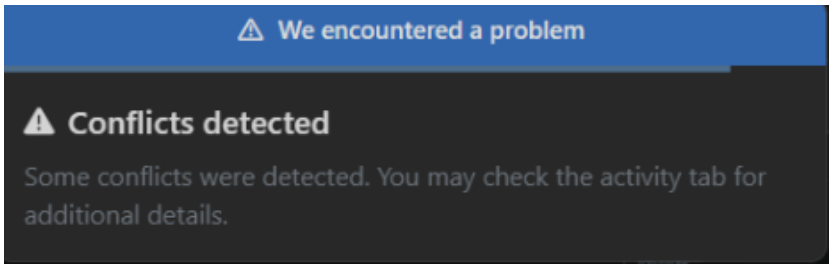


How FileCloud Desktop for macOS handles change conflicts

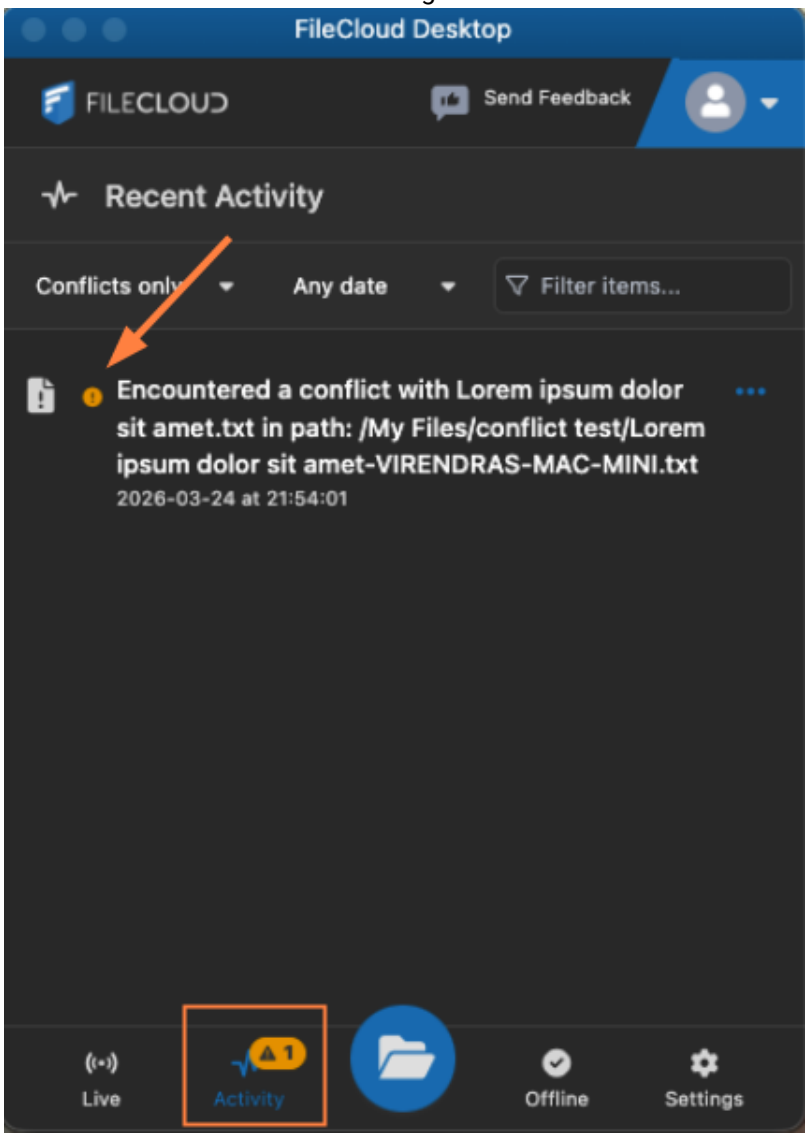
How to know there is a conflict

FileCloud Desktop indicates that there is a conflict in the following ways:

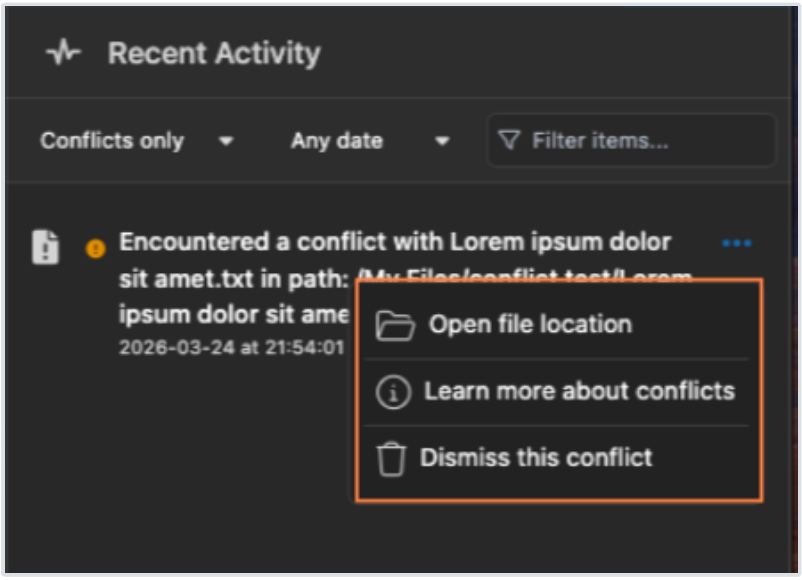
- A popup appears on your screen and directs you to the Activity tab.



- The Recent Activity dashboard screen shows a warning icon beside the action and indicates Modifying the file [filename] ended in a conflict. In addition, the Activity tab at the bottom of the dashboard is overlaid with a warning icon that indicates the number of conflicts:

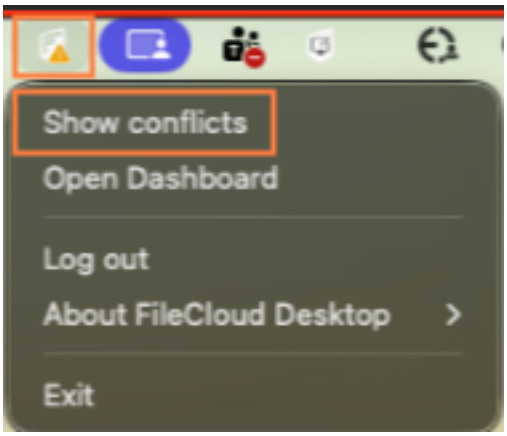


If you click the more icon next to the conflict file it gives you the options:



Open file location - Takes you to the folder storing the file in the FileCloud Desktop root in macOS Finder. The original file (not the conflict file) is highlighted.
Learn more about conflicts - Takes you to the current help page.
Dismiss this conflict - Removes the conflict from your Recent Activity screen, but maintains the conflict file so you may resolve the conflict later.

- In the desktop tray, the FileCloud Desktop icon is overlaid with a warning icon. Clicking it shows the option **Show conflicts**. Clicking **Show Conflicts** takes you to the Recent Activity screen in the dashboard where the conflict is listed.



What causes a conflict

File conflict occurs when FileCloud Desktop for macOS cannot determine which copy of a file is the most recent. It can arise under the following conditions:

- When two users save the same file at approximately the same time.

- When one user is editing a file offline, and the file is modified by another user in FileCloud. When the person who was offline comes back online and FileCloud Desktop tries to upload the edited version to the server, it detects that there is a new version available.

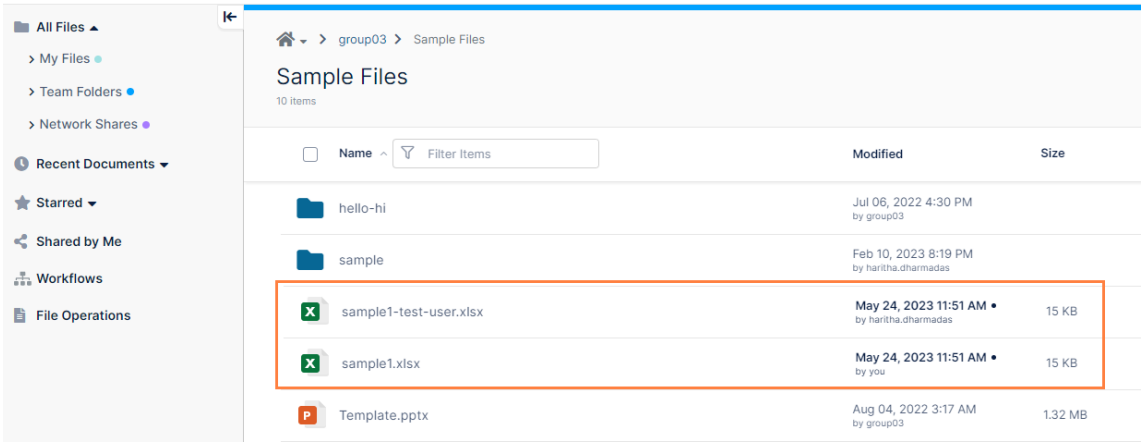
FileCloud's resolution: the conflict file

In these cases:

- **If the conflict files have been edited by two different users**:
  FileCloud Desktop for macOS automatically resolves the conflict by saving the copy of the file on the server with the original filename, and saving the local copy of the file with the name **[filename]-[username].[ext]**. Both files are saved locally in FileCloud.
- **If the conflict files have been edited by the same user**:
  FileCloud Desktop for macOS automatically resolves the conflict by saving the copy of the file on the server with the original filename, and saving the local copy of the file with the name **[filename]-[machine name].[ext]**. Both files are saved locally in FileCloud.

In the following example, the users Melanie and test-user edit the file sample1.xls at the same time. The following events occur:

- Melanie edits sample1.xls on the FileCloud server. test-user edits sample1.xls in a local download from FileCloud Desktop for macOS.
- They save the file at the same time.
- Melanie's edits are saved in **sample1.xls**.
- test-user's edits are saved in **sample1-test-user.xls**.
- Both files appear on the server.



How to resolve a file conflict:

1. Review the conflicting versions by opening each version of the file and comparing their contents.
2. Decide which version to keep.
   Either:
   Keep the version with the most recent or correct changes;

Or:
Manually merge the changes from the multiple versions into a single file.

3. Save the final version with the original file name once you've identified or merged the correct content.
4. Delete the remaining conflict files or move them to another folder for reference.
   This helps prevent future confusion and ensures only one version continues to sync.
5. Verify that now, the version you saved syncs successfully without generating warnings.

Conflict information continues to be shown each time the user launches the app until the user resolves or dismisses the conflict or logs out.

Mass Deployment Configuration for FileCloud Desktop for macOS

You can configure mass deployment settings for FileCloud Desktop for macOS through Remote client management (RMC).

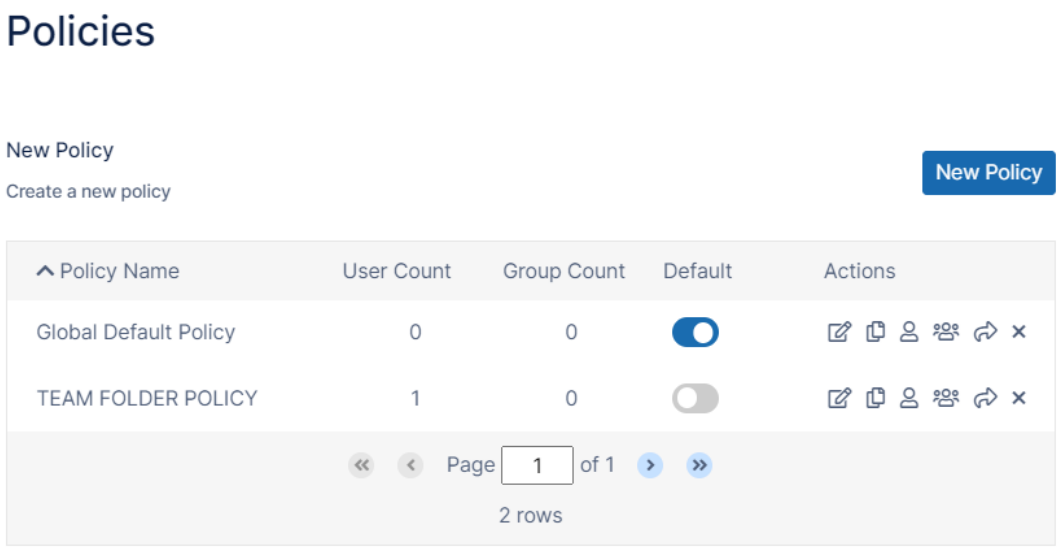
To configure FileCloud Desktop for macOS for mass deployment through RMC

You can configure client device settings for FileCloud Desktop for macOS remotely by specifying the configuration XML in the **Device Configuration** tab of FileCloud policies.

For most clients, if the user changes the configuration locally, then the remote settings configured by the Administrator will override those settings the next time the client refreshes its settings.

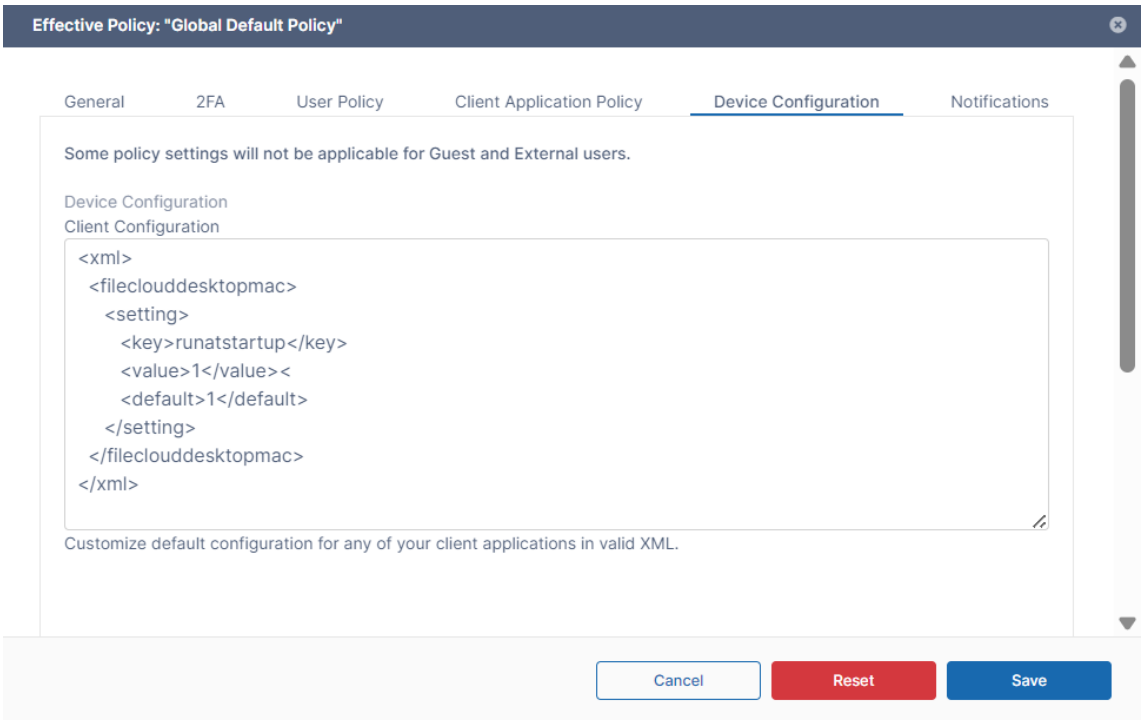
1. In the FileCloud admin portal's left navigation bar, scroll down and click **Settings**. Then, on the **Settings** navigation page, click **Policies**  .

The **Policies** settings page opens.



2. Edit the policy of the users whose client device settings you want to modify.
3. Click the **Device Configuration** tab.
4. Paste or type in the remote device configuration XML in **Device Configuration** using any number of parameters from the table below.

```
<xml>
  <filecloudesktopmac>
     <setting>
        <key>runatstartup</key>
        <value>1</value><
        <default>1</default>
     </setting>
  </filecloudesktopmac>
</xml>
```



<default> is an optional tag that indicates if the setting can be changed through the user interface.
A value of 1 indicates the setting is a default and can be changed by the user through the user interface.
A value of 0 (or omission of <default>) indicates that the setting is overridden and cannot be changed by the user through the user interface.

Supported parameters for FileCloud Desktop for macOS. All parameters are optional. Add one of more of these parameters (using <key>, <value>, and <default> tags) in the <setting> tags in the XML.

Parameter (Key)	Description	Values
lockonopen	Automatically lock files when they are opened.	0 (disabled) 1 (enabled) default
runatstartup	Run FileCloud Desktop for macOS on system startup.	0 (disabled) 1 (enabled) default
loglevel	Level of details stored in log files, where **information** is the least detailed, and **trace** is the most detailed.	"information" default "debug" "trace"

<table>
<tr><th>Parameter (Key)</th><th>Description</th><th>Values</th></tr>
<tr><td>language</td><td>Language of the FileCloud Desktop for macOS user interface.</td><td>
<table>
<tr><th>Value</th><th>Language</th></tr>
<tr><td>nl</td><td>Dutch</td></tr>
<tr><td>en (default)</td><td>English</td></tr>
<tr><td>de</td><td>German</td></tr>
<tr><td>es</td><td>Spanish</td></tr>
<tr><td>pt</td><td>Portuguese</td></tr>
<tr><td>fr</td><td>French</td></tr>
<tr><td>ar</td><td>Arabic</td></tr>
<tr><td>it</td><td>Italian</td></tr>
<tr><td>ru</td><td>Russian</td></tr>
</table>
</td></tr>
<tr><td>mutenotifications</td><td>Suppress all notifications on FileCloud Desktop.</td><td>0 (disabled, notifications are shown) default
1 (enabled, notifications are not shown)</td></tr>
</table>

Example:

The code below shows example settings:

```
<xml>
<filecloudesktopmac>
  <setting>
    <key>lockonopen</key>
    <value>1</value>
  </setting>
  <setting>
    <key>runatstartup</key>
    <value>1</value>
```

```
    <default>1</default>
  </setting>
  <setting>
    <key>loglevel</key>
    <value>debug</value>
  </setting>
  <setting>
    <key>language</key>
    <value>en</value>
  </setting>
  <setting>
    <key>mutenotifications</key>
    <value>0</value>
  </setting>
 </fileclouddesktopmac>
</xml>
```

In this example:

- Files are automatically locked when they are opened by FileCloud Desktop (lockonopen = 1). Default value.
- The application runs at startup (runatstartup = 1, default = 1). Default value.
- The log level is set to "debug" (loglevel = debug). Overridden value.
- The language is set to "en" (language = en). Default value.
- Notifications are not muted (mutenotifications = 0). Default value.

If a key is not supported or a value is incorrect, the application skips it and logs a warning message.

Using FileCloud for Office with FileCloud Desktop for macOS

FileCloud for Office is an MS Office add-in for Word, Excel, and PowerPoint which can be used in both Windows and macOS with FileCloud Sync, FileCloud Drive, and FileCloud Desktop. It is available in FileCloud beginning with version 23.1.
For instructions on how to install FileCloud for Office, see Using FileCloud for Office.

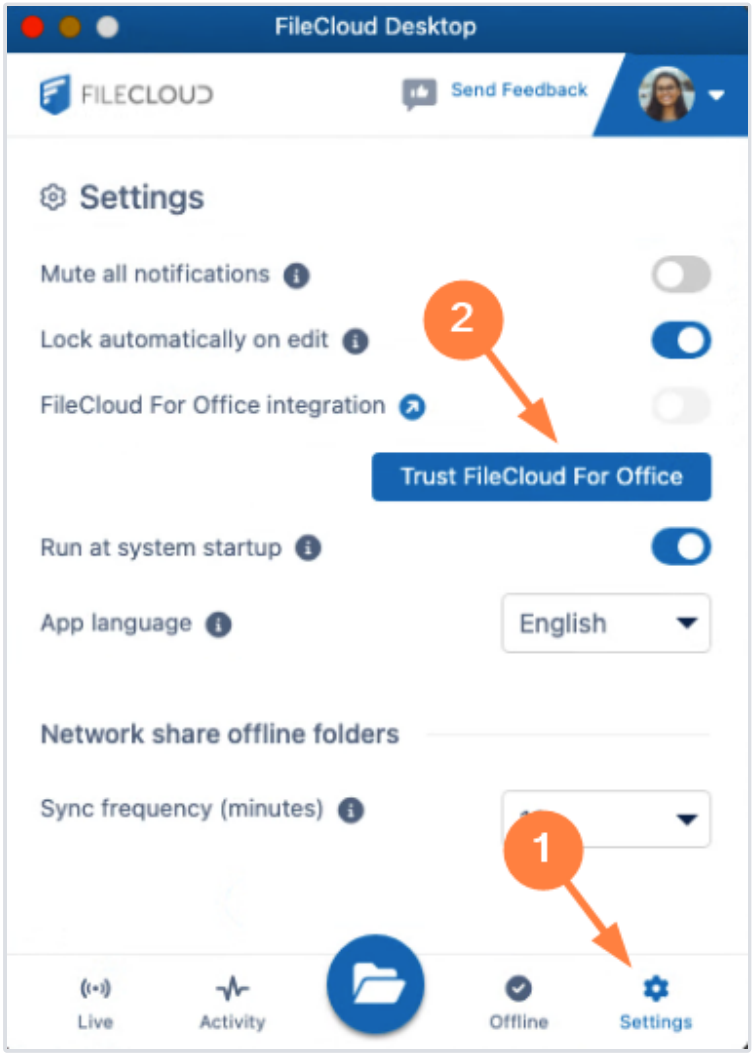
Before using FileCloud for Office with FileCloud Desktop for macOS

The first time you install FileCloud Desktop for macOS, you must:

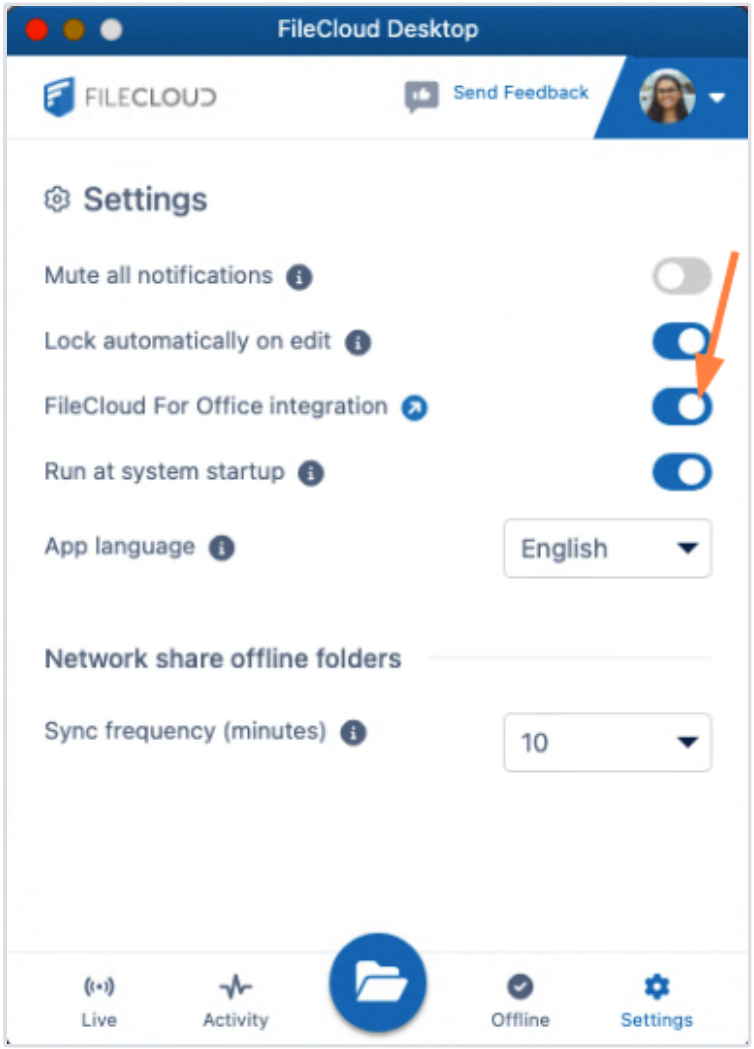
- Confirm that you trust FileCloud for Office and enable it as shown in the following procedure.

To confirm that you trust FileCloud for Office:

1. After you log in to FileCloud Desktop for MacOS, click the **Settings** tab.
2. Then, click the **Trust FileCloud for Office** button.



The **Trust FileCloud for Office** button disappears, and the slider for **FileCloud For Office integration** becomes accessible, and is turned off by default. Click it to turn it on so you are able to use FileCloud for Office.



FileCloud for Office is now enabled, but to use it in Office files, you must attach the add-in to each type of Office file from your FileCloud Desktop directory.

Working with FileCloud for Office in FileCloud Desktop for macOS

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

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

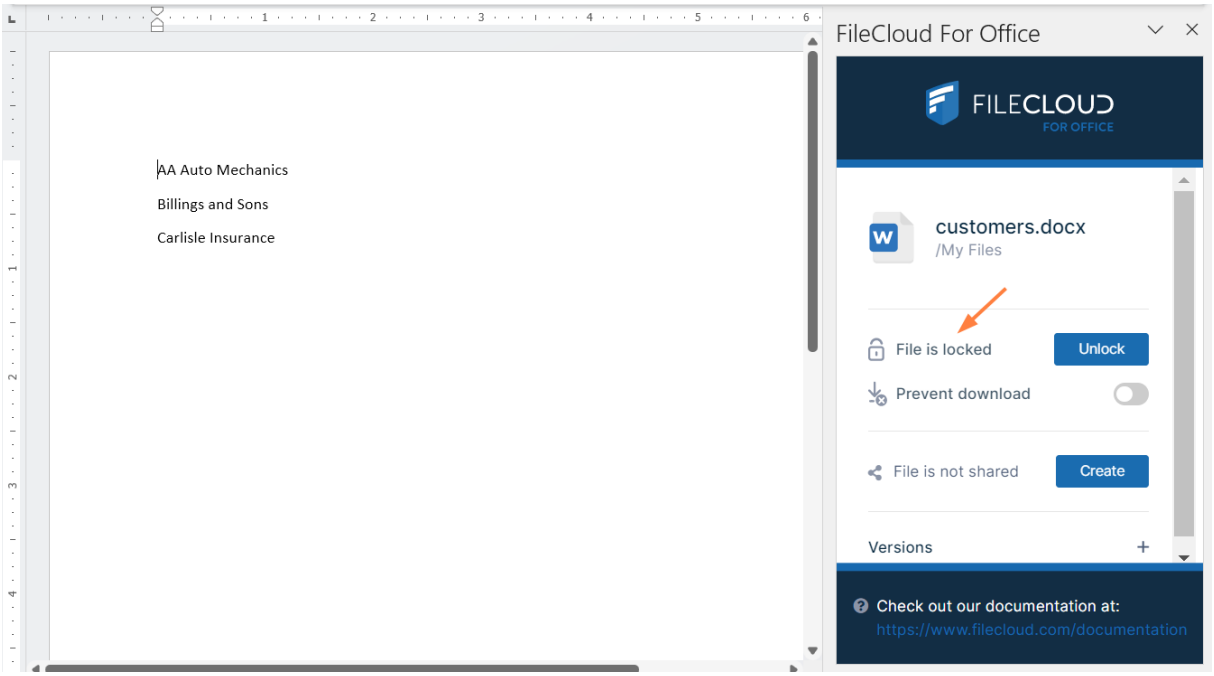
Lock or unlock a file

Locking and unlocking files

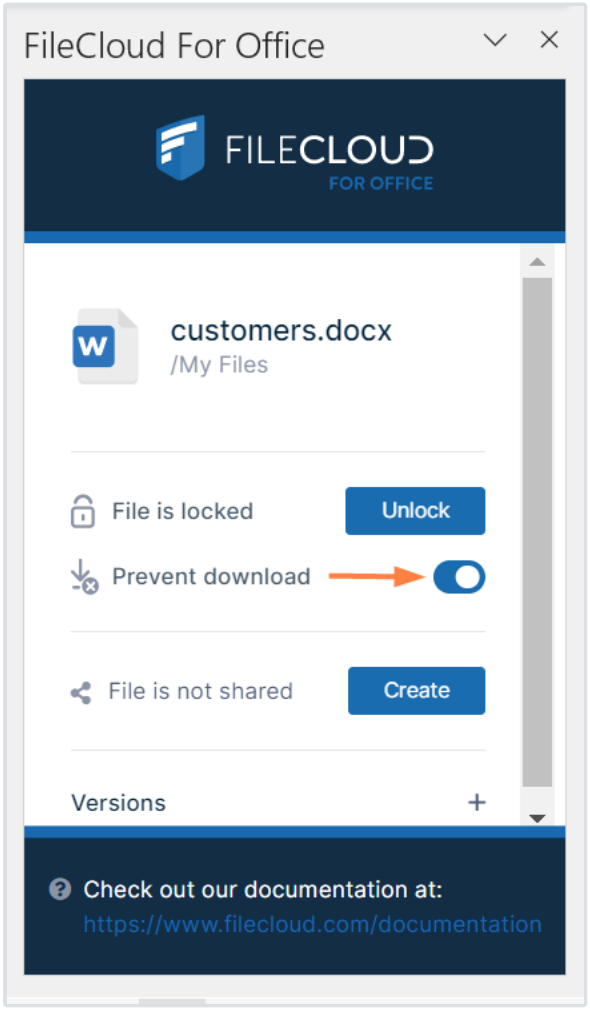
You can use the file locking function in FileCloud for Office to:

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

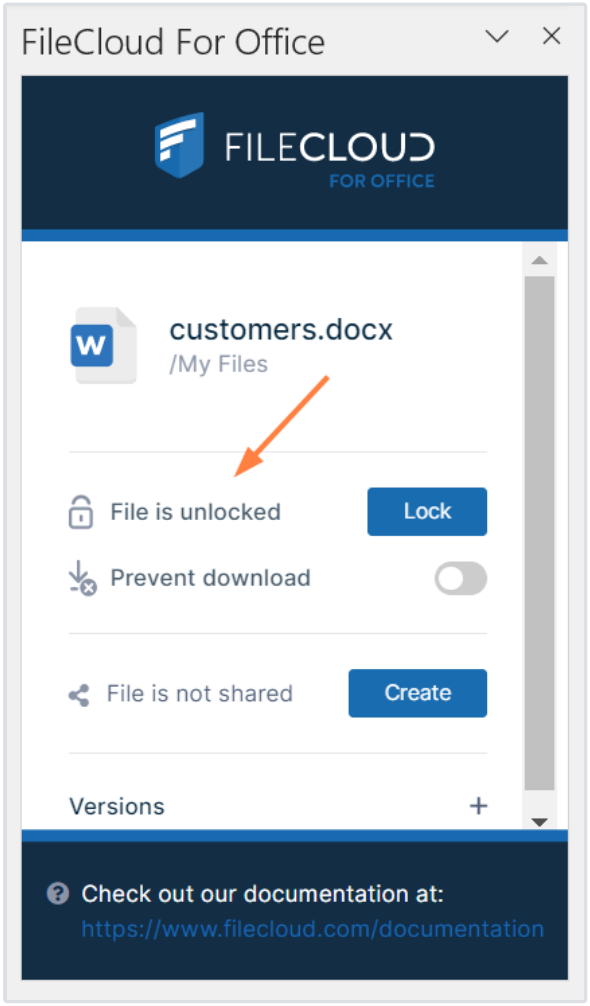
If a shared file is not locked when you open it for edit, another user can also open the file and make changes.
To avoid this, by default, FileCloud for Office automatically locks files for editing when they are opened.
When you open an Office file in your client directory, the FileCloud for Office panel shows **File is locked**, and by default, users are allowed to download or read the file (**Prevent download** is disabled).



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



- To unlock the file while you have it opened for edit, click **Unlock**. Now other users can modify as well as view and download the file.
  Note: Prevent download cannot be enabled when the file is unlocked.



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

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

For a locked file with download (read) prevented:
If USER1 has locked (and read blocked) the file:

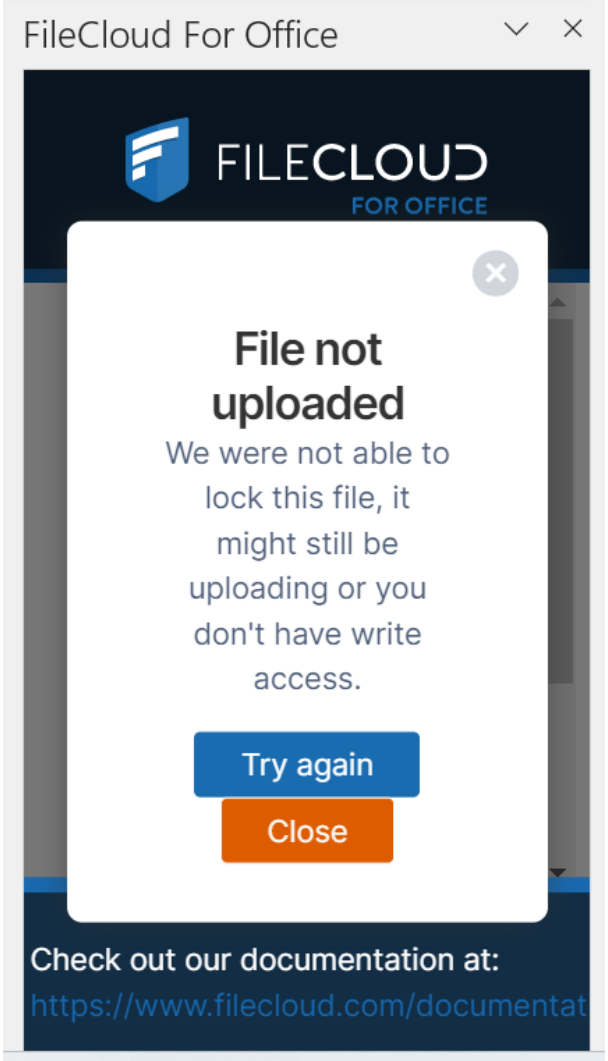
- The FileCloud client will not download the file for USER2

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

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

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

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



If you are an admin and want to disable locking, see Managing User Locks.

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

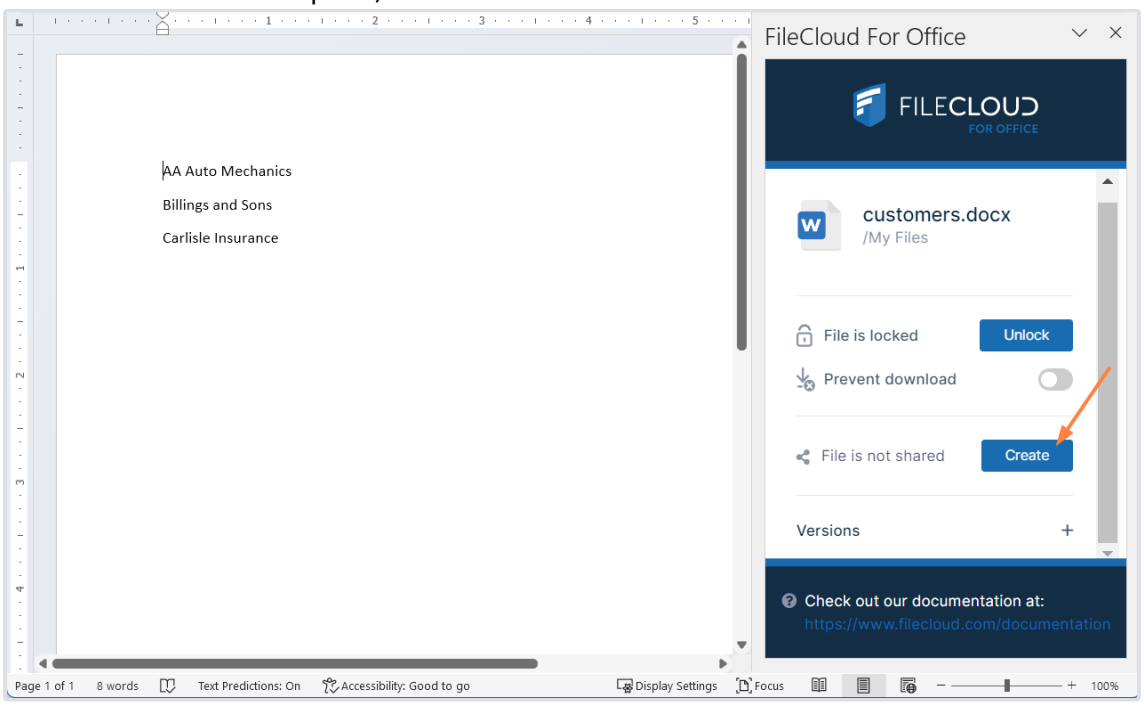
Action	Doc IQ Lock Enabled	Prevent Download	Lock Status Before Open	Lock Status After Open	Lock Status After close
An unlocked file is opened by USER1	☑	☒	File is not locked	File is locked (read allowed) by USER1	File is not locked
An unlocked file is opened by USER1	☒	☒	File is not locked	File is not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

Share a file

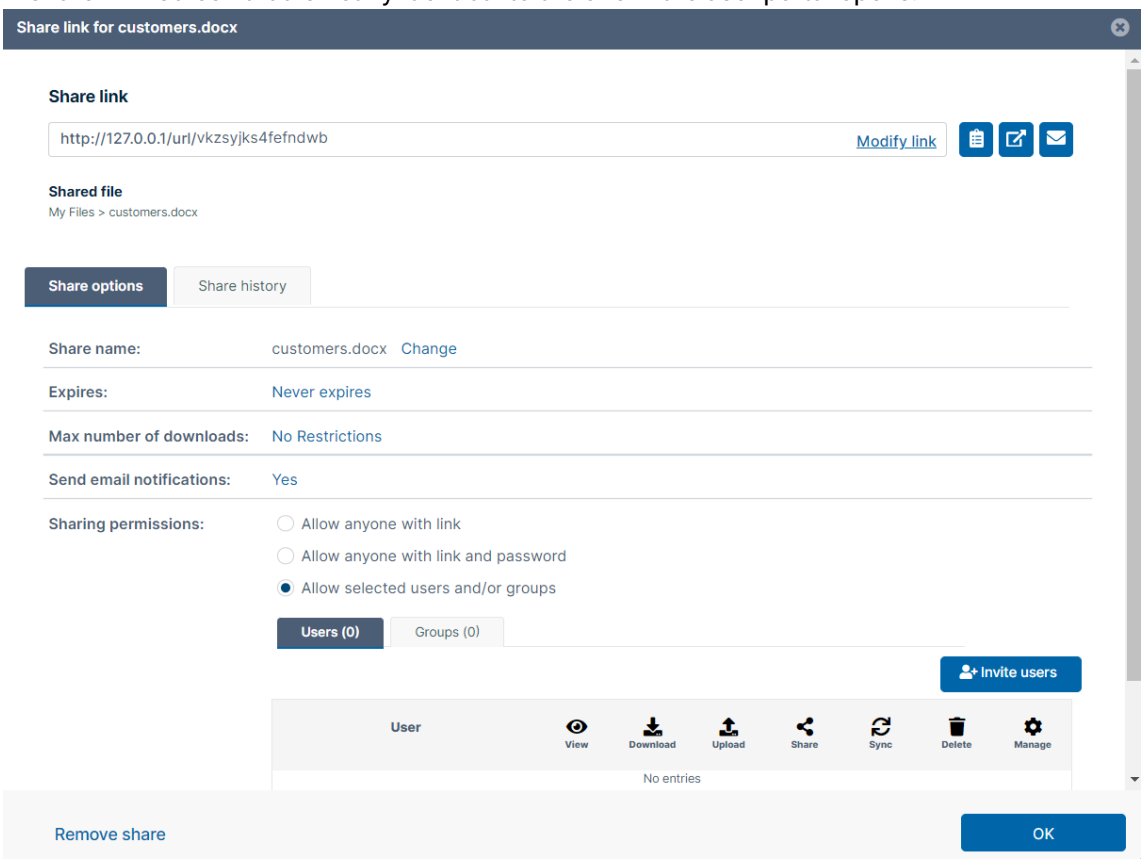
Sharing a file

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

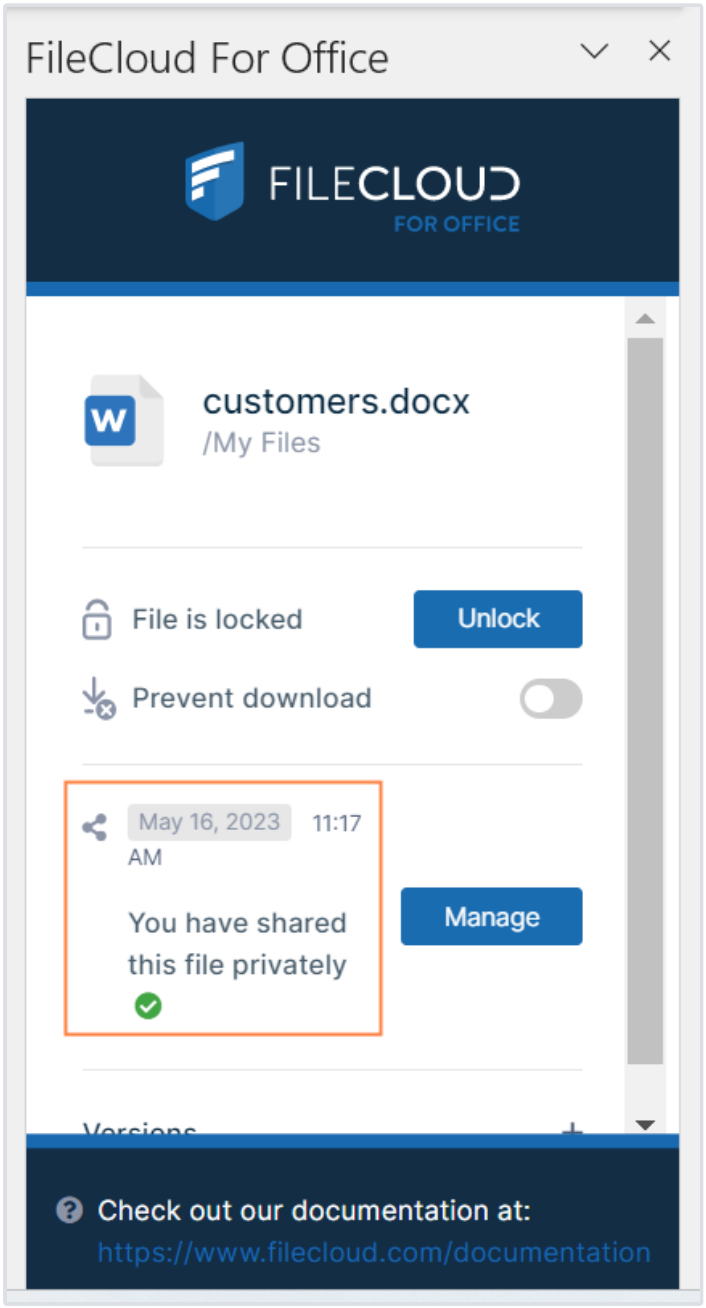
1. In the FileCloud for Office panel, click **Create**.



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



2. Share the file using the same settings and options that you would for a share in the user portal. See Sharing Files and Folders for help.
   Note: The option for downloading the share QR code, which is available for shares created from the user portal, is not available for shares created in FileCloud for Office.
   After you have shared the file, the FileCloud for Office panel displays details of the share:



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

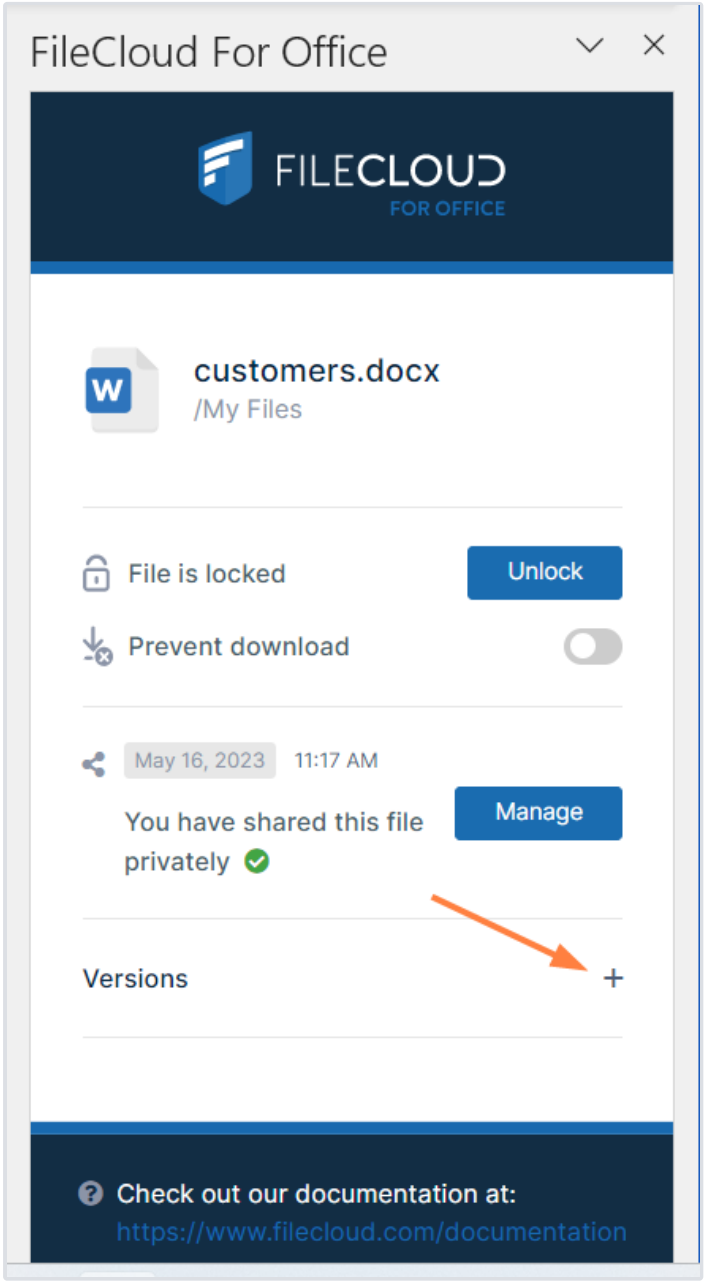
Download versions, view details and metadata

Downloading versions, viewing details, viewing metadata

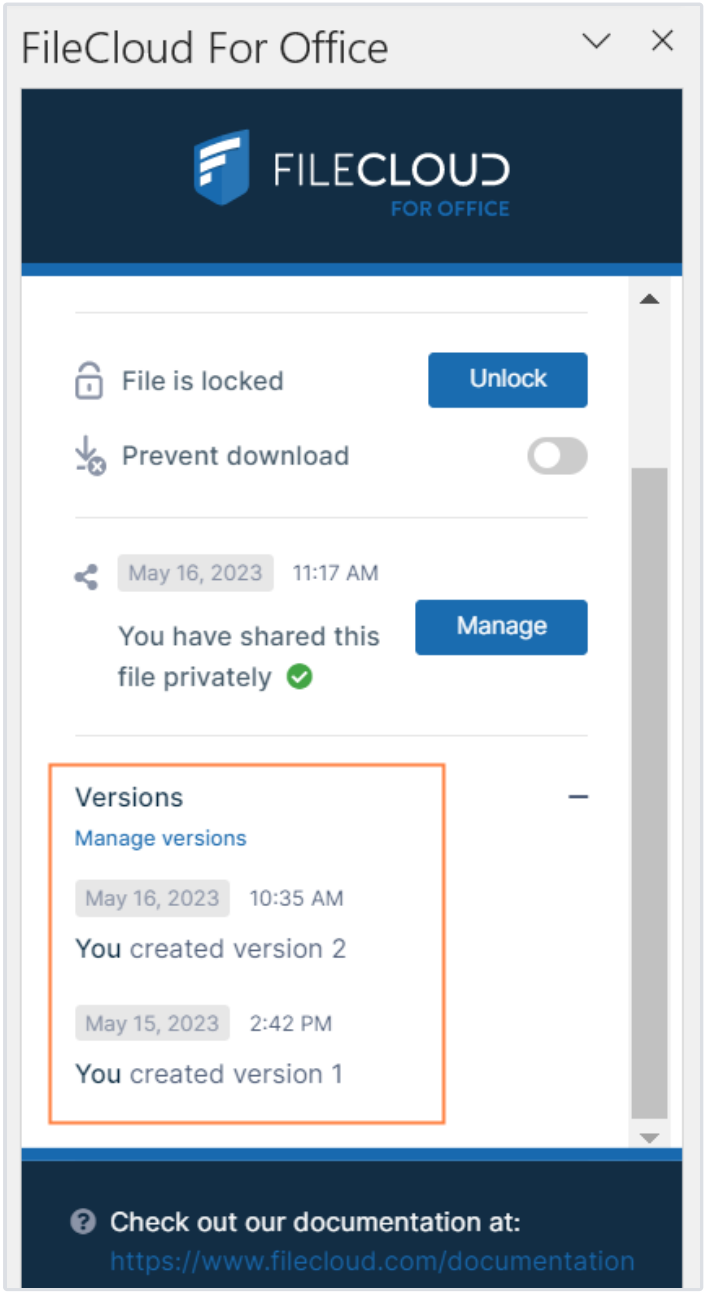
Versions

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

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

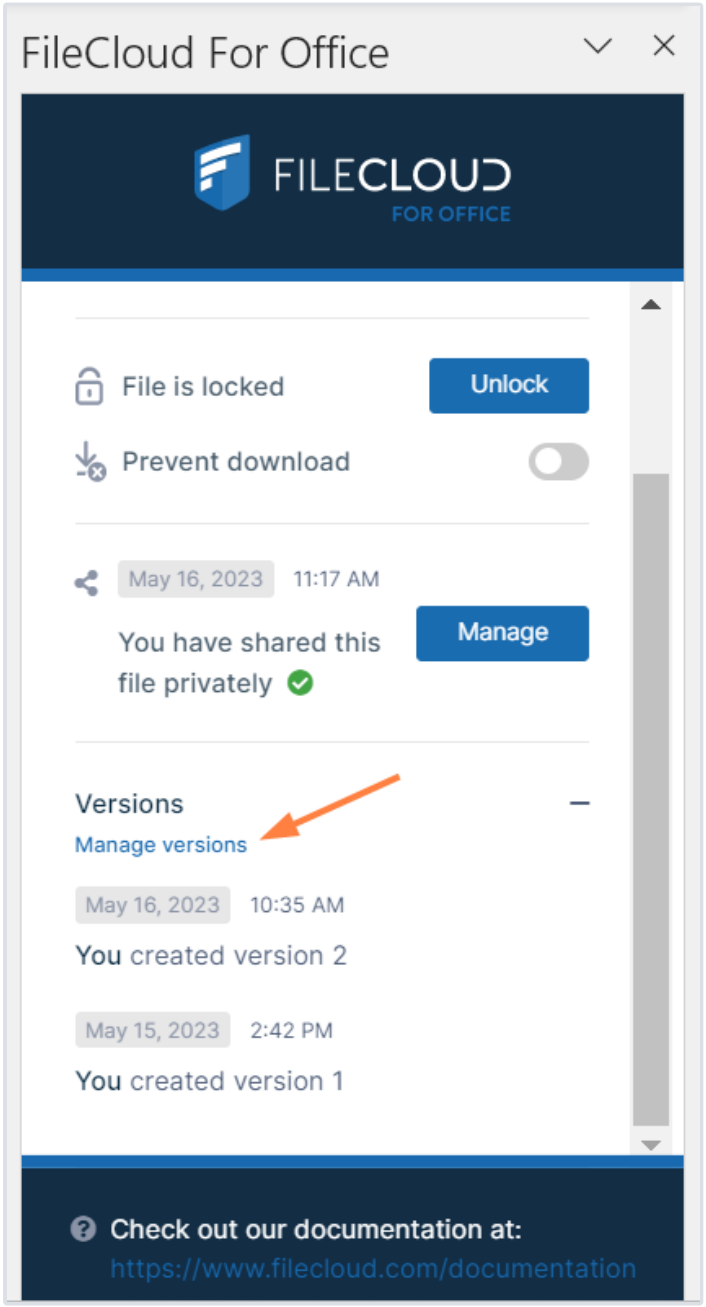


The expanded **Versions** section shows you version information about the file.

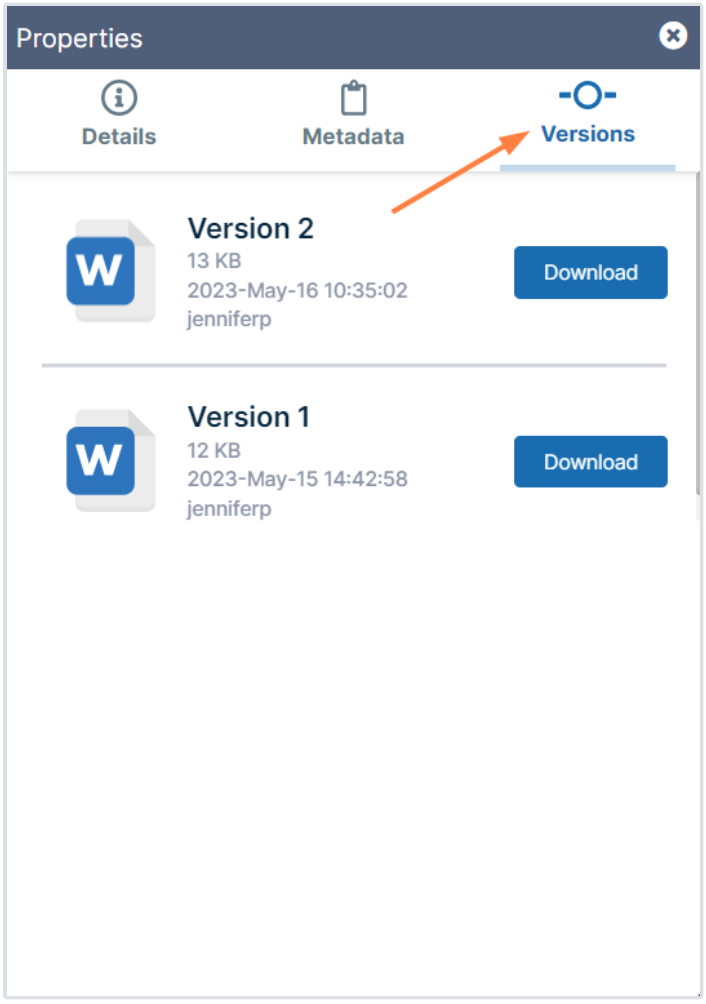


To download file versions in FileCloud for Office:

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



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

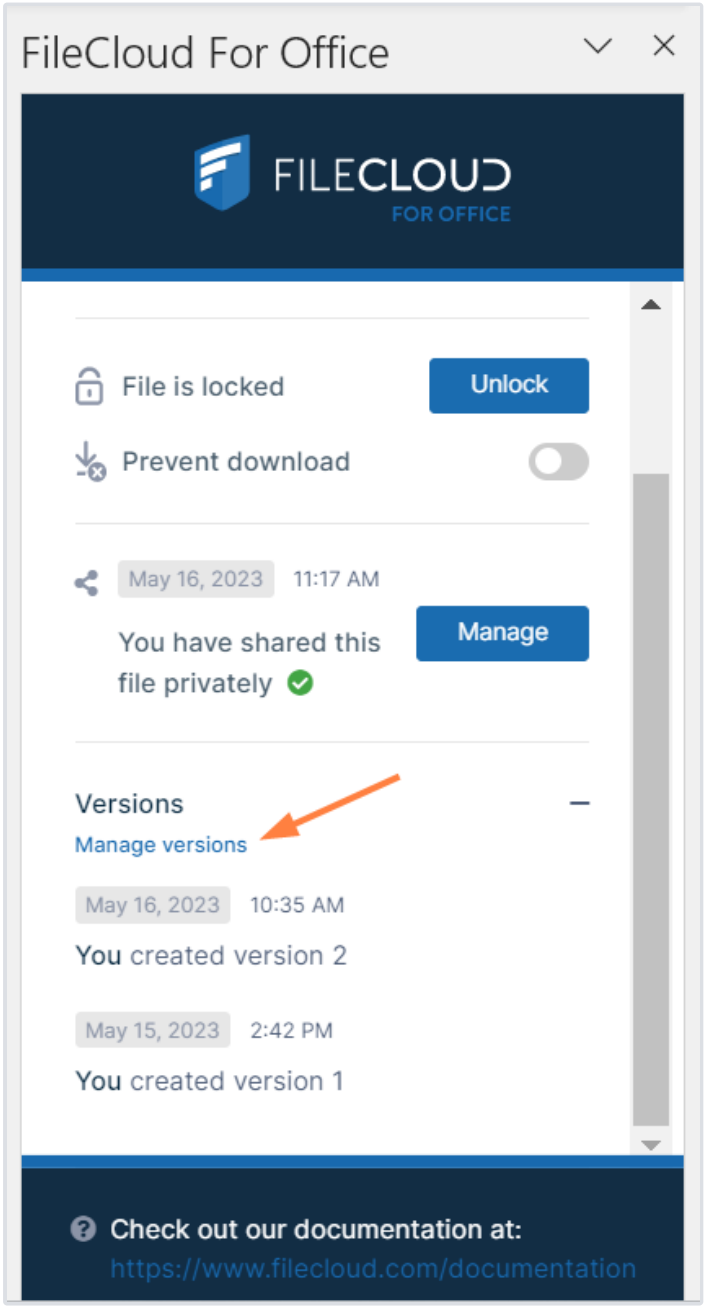


2. Click **Download** for the version that you want to download, and save it.

Details

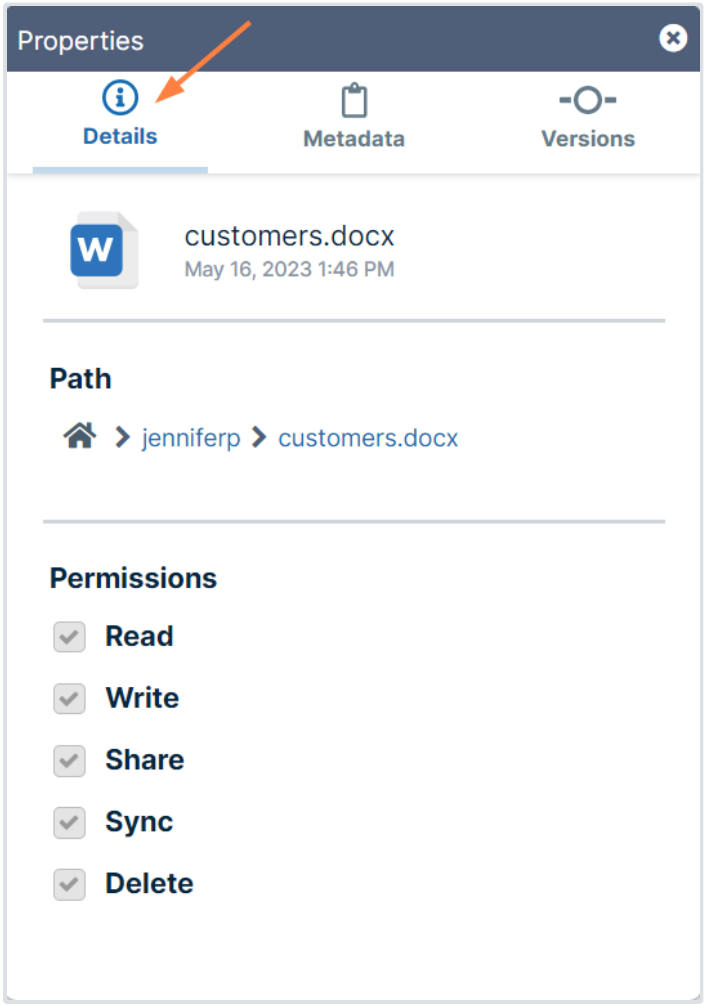
To view file details:

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



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

2. Click the **Details** tab.

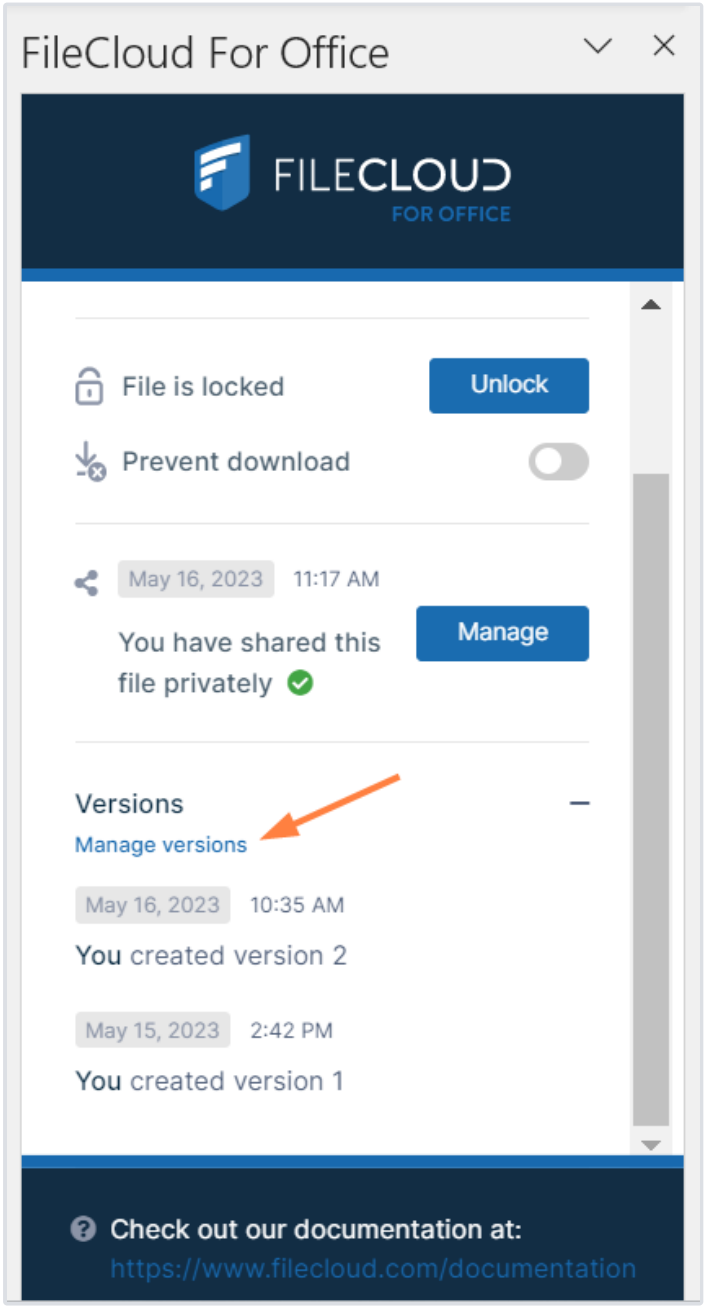


The details shown are the filename and type, the last modified date, the path of the file in FileCloud, and your permissions for the file.

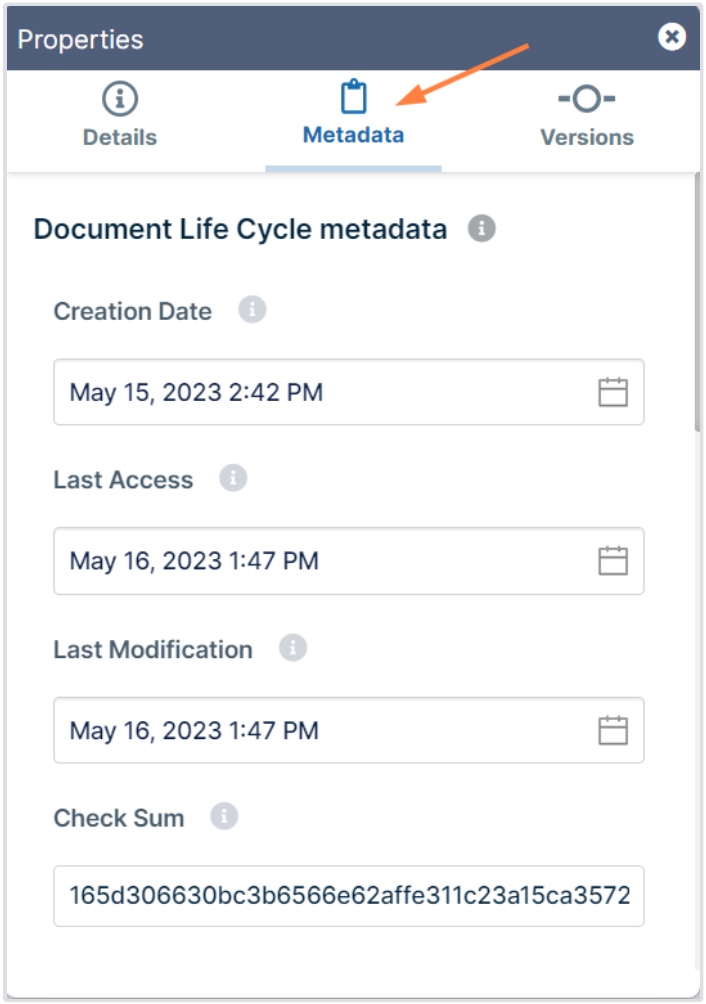
Metadata

To view metadata information for the file:

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



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



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

FileCloud for Office log locations

Locating FFO logs

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

Windows: %appdata%/FFOServer

macOS: /Users/[USERNAME]/Library/Preferences/FFOServer

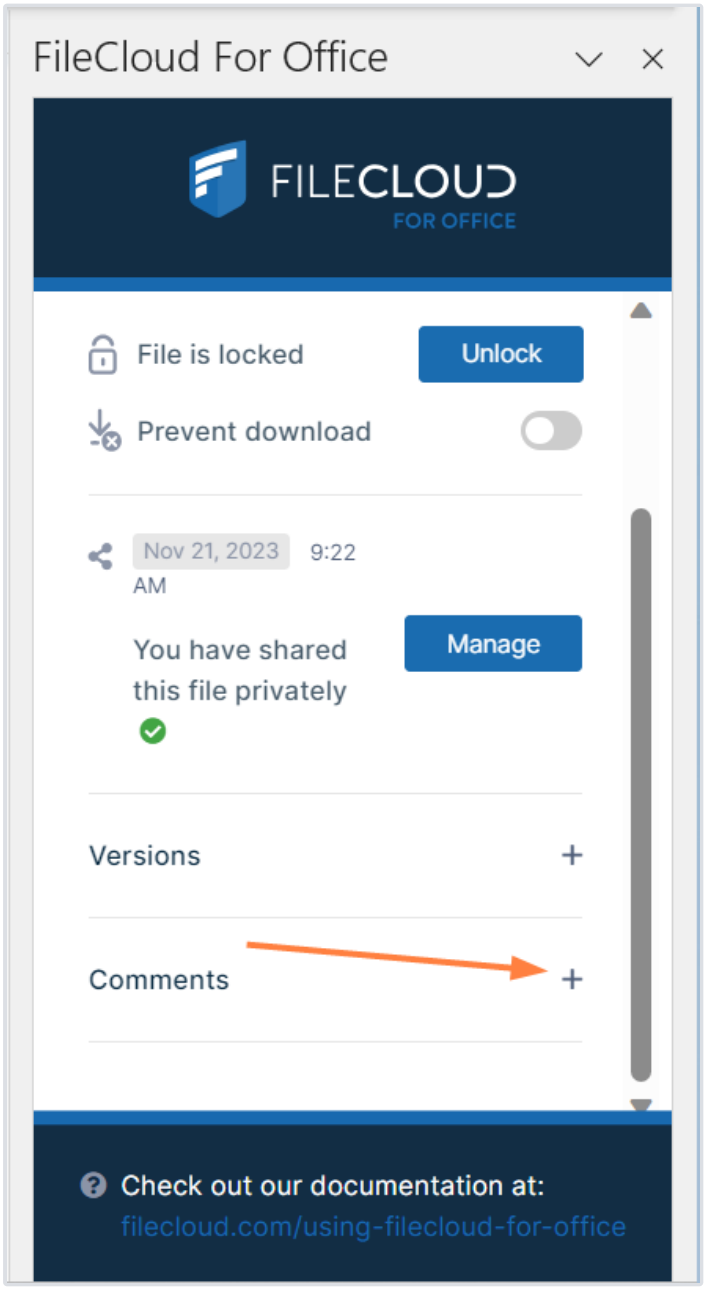
View and add comments

Viewing and adding comments

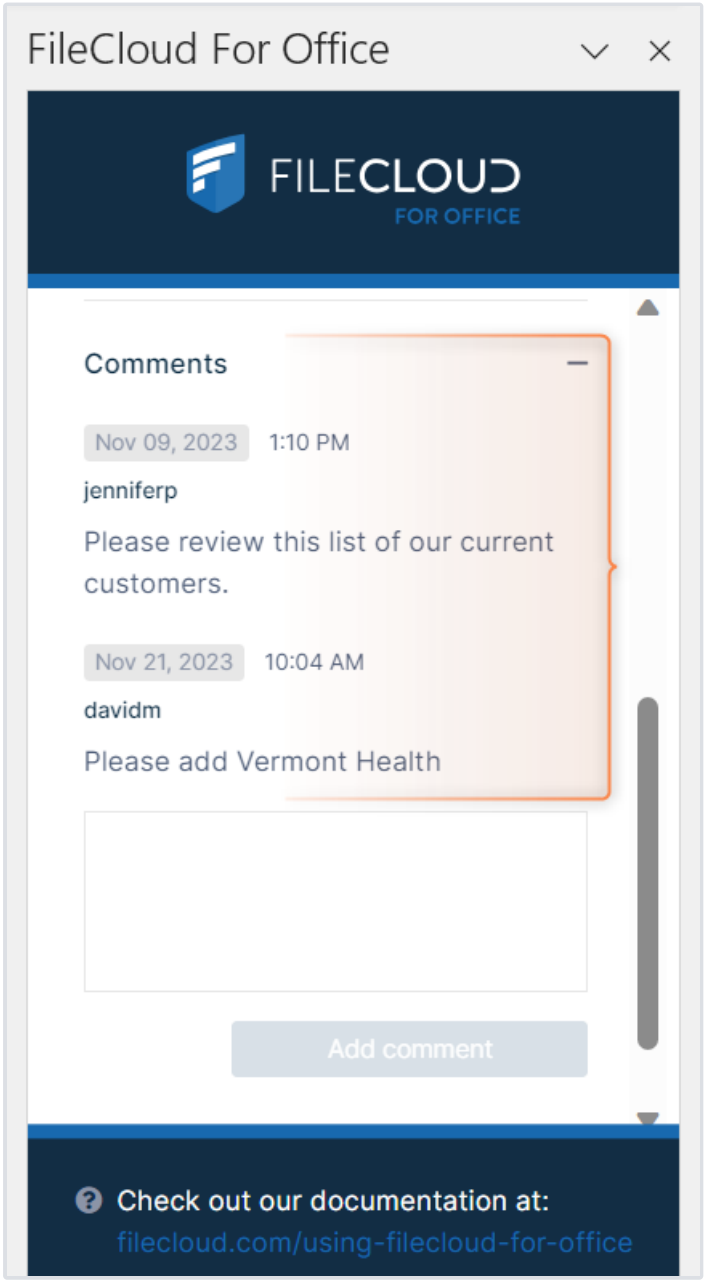
Comments added to files and folders in FileCloud for Office also appear in the user portal and any of the other client apps.

To view and add comments in FileCloud for Office:

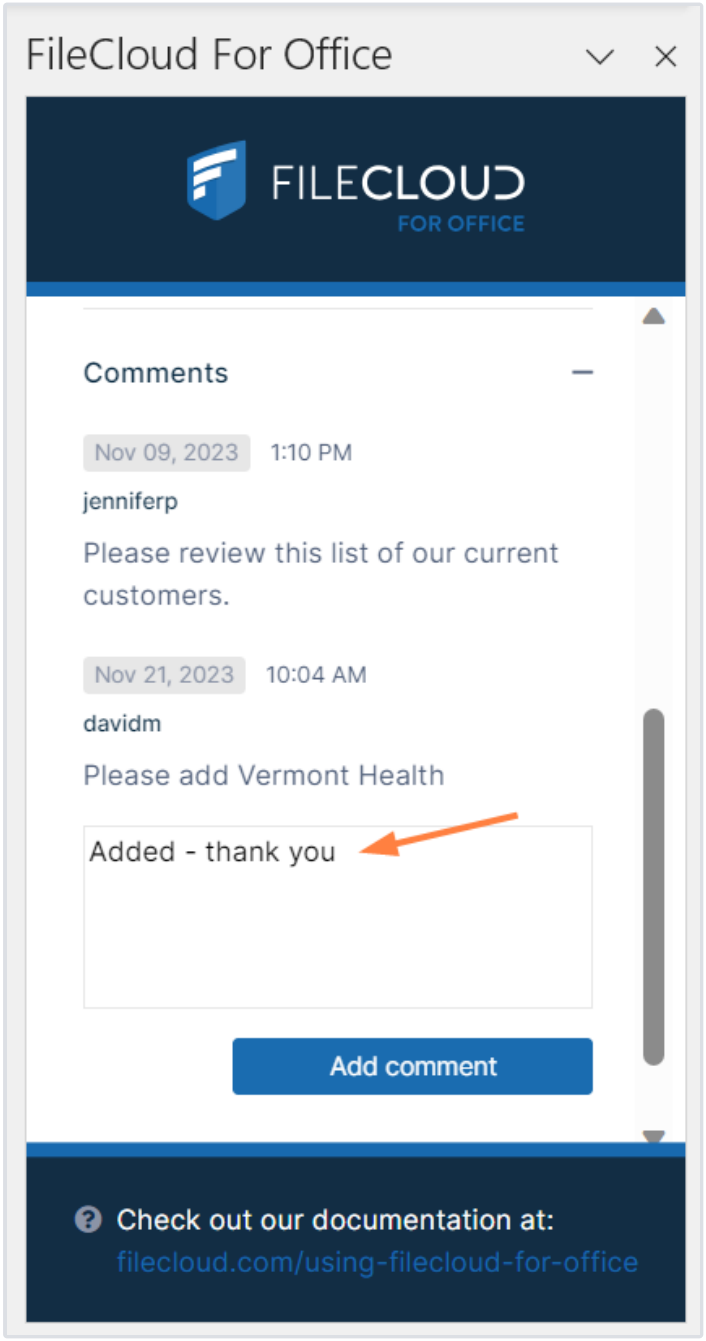
1. If **Comments** is not visible in the FileCloud for Office panel, scroll down to the bottom of the panel.
2. Click the **+** across from **Comments**.



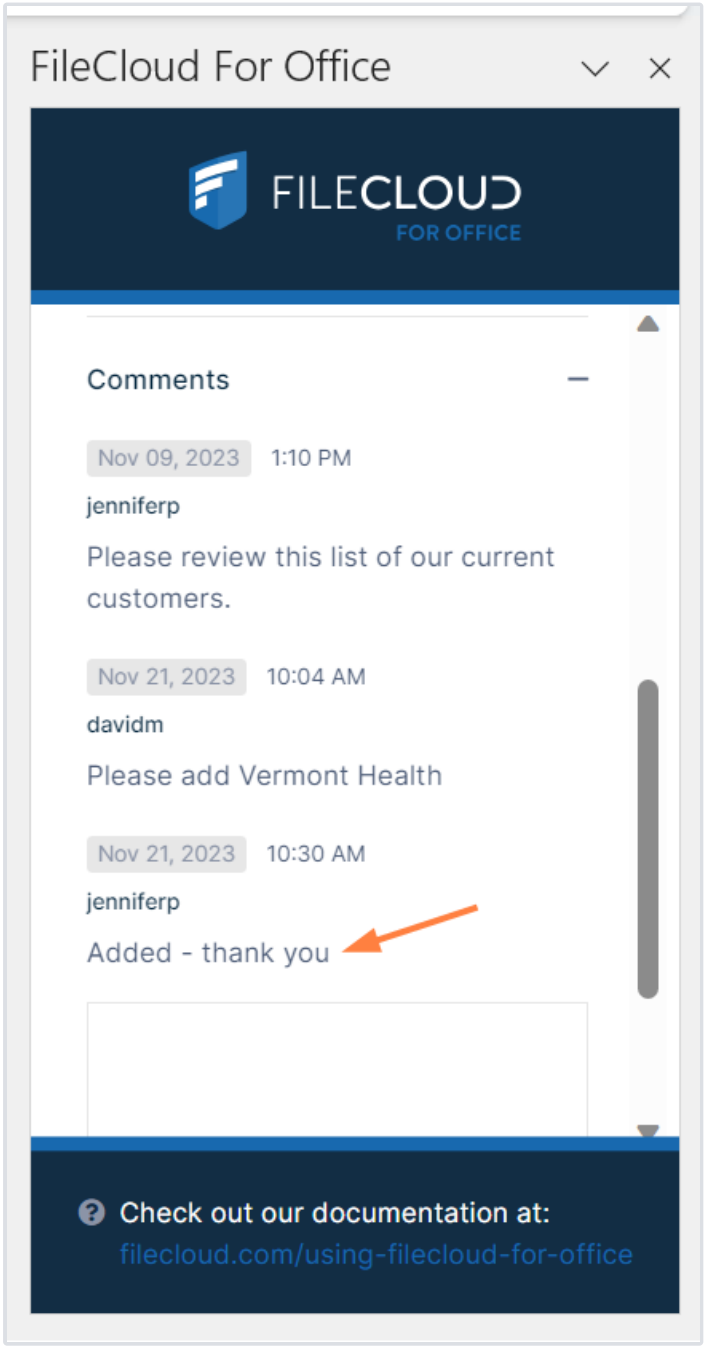
Any existing comments added to the file or folder here or anywhere else in FileCloud appear above the **Comments** box.



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



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

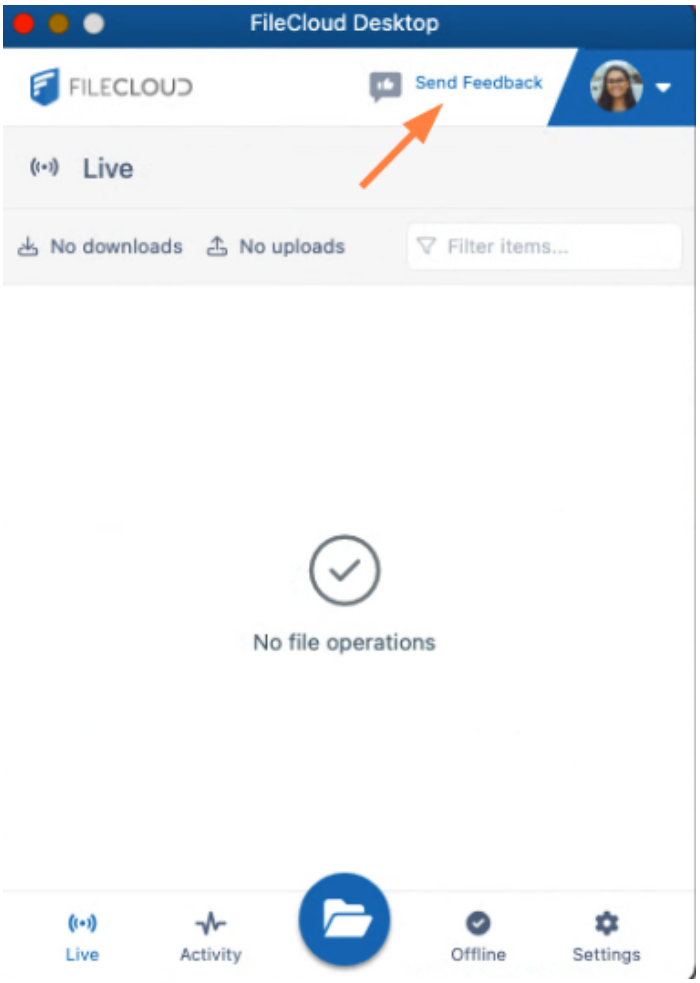


Sending Feedback from FileCloud Desktop for macOS

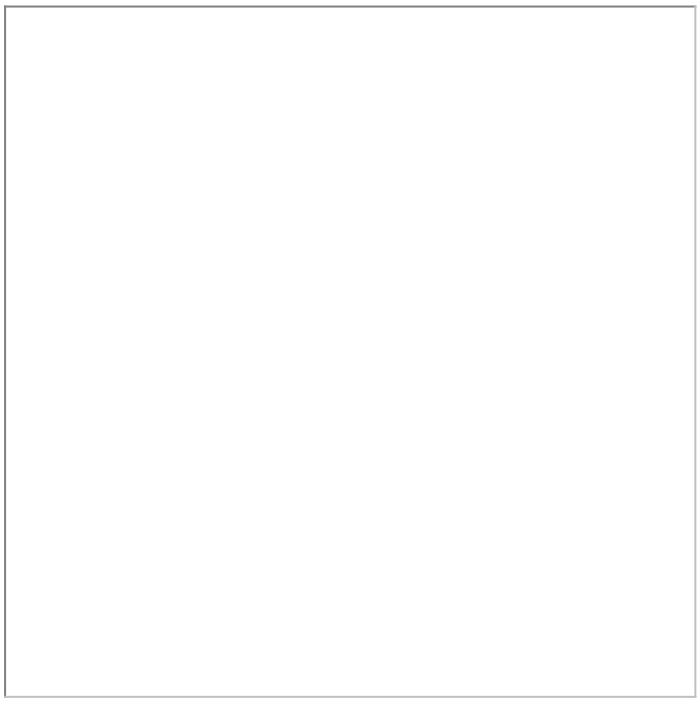
You can send feedback about FileCloud Desktop for macOS to FileCloud directly from the dashboard.

To send feedback:

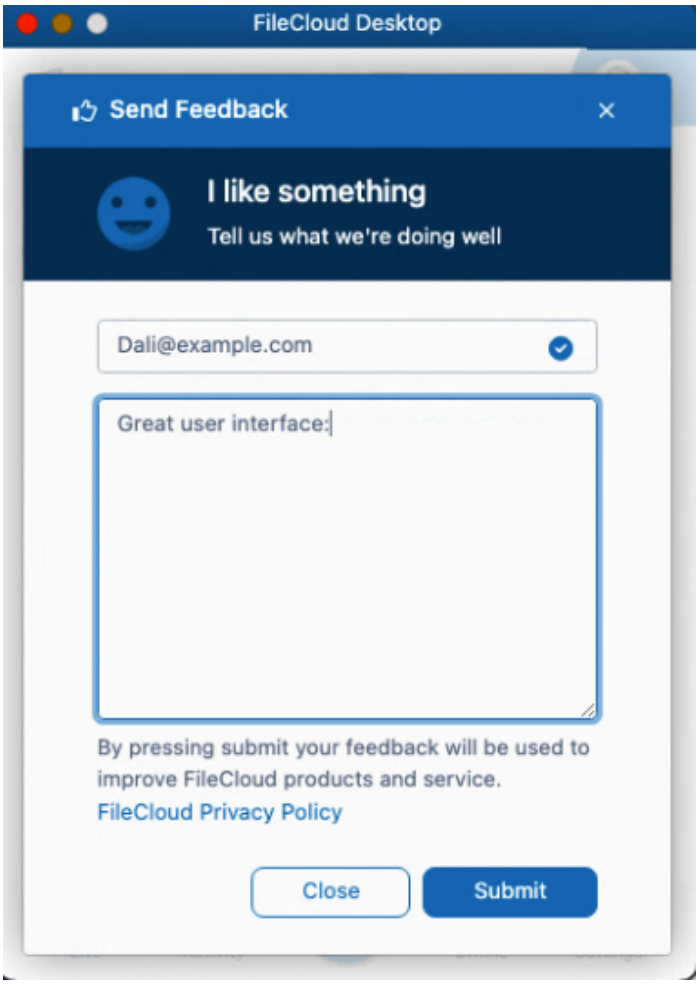
1. From any tab in the dashboard, click **Send Feedback**.



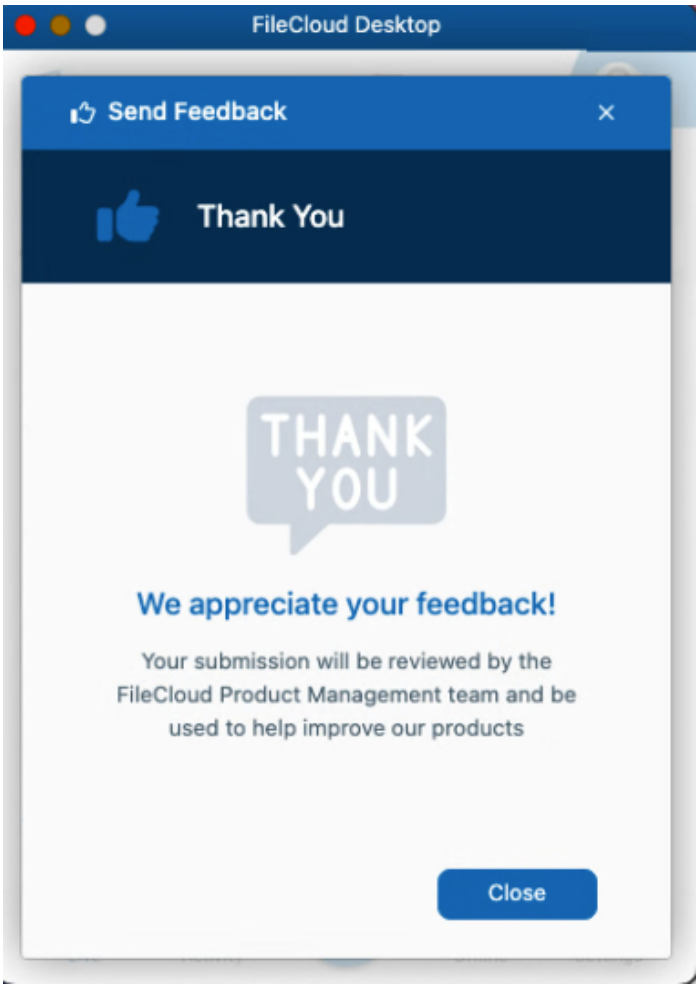
A **Send Feedback** screen opens:



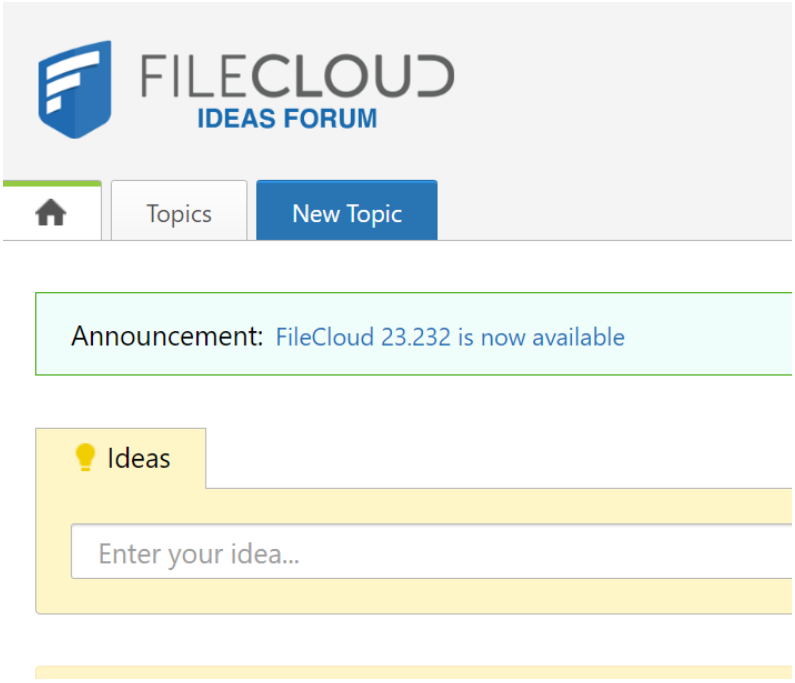
2. To send a message about something you like or dislike:
    a. Click **I like something** or **I dislike something**, and enter your email and comment.



b. Click **Submit**.
A message tells you that the FileCloud Product Management team will review your message.



3. To share an idea, click **I have an idea**.
   You are taken directly to the FileCloud Ideas forum, where you can enter your idea.



White Labeling in FileCloud Desktop for macOS

Self service white labelling for FileCloud Desktop for macOS is available in version 23.261.0 and later.

There are two different options for white labeling your FileCloud Desktop for macOS user interface:

- **Complete white labeling** - Customers with Enterprise Advanced licenses can use this option, which enables branding with custom logos and names for system components. Complete white labeling is optimal for OEM's and service providers. If you are interested, please Contact FileCloud Support to confirm that you meet minimum eligibility requirements.
- **Self service white labeling** - All customers can take advantage of this feature, which enables customization of the product name and support docs url through a simple JSON file, as shown in the instructions below. MDM installation is also required.

Customization of product documentation is not supported; however, upon request, product documentation can be provided to you in Word format for your own customization.

Complete white labeling

Once you have confirmed your eligibility for white labeling and purchased it through FileCloud Sales, you will be asked to set up an update server for the white labeled system and to provide FileCloud Support with icons, strings, and other resources necessary for the customization. FileCloud Support will provide you with a custom installer for FileCloud and custom FileCloud upgrades.

Self service white labeling

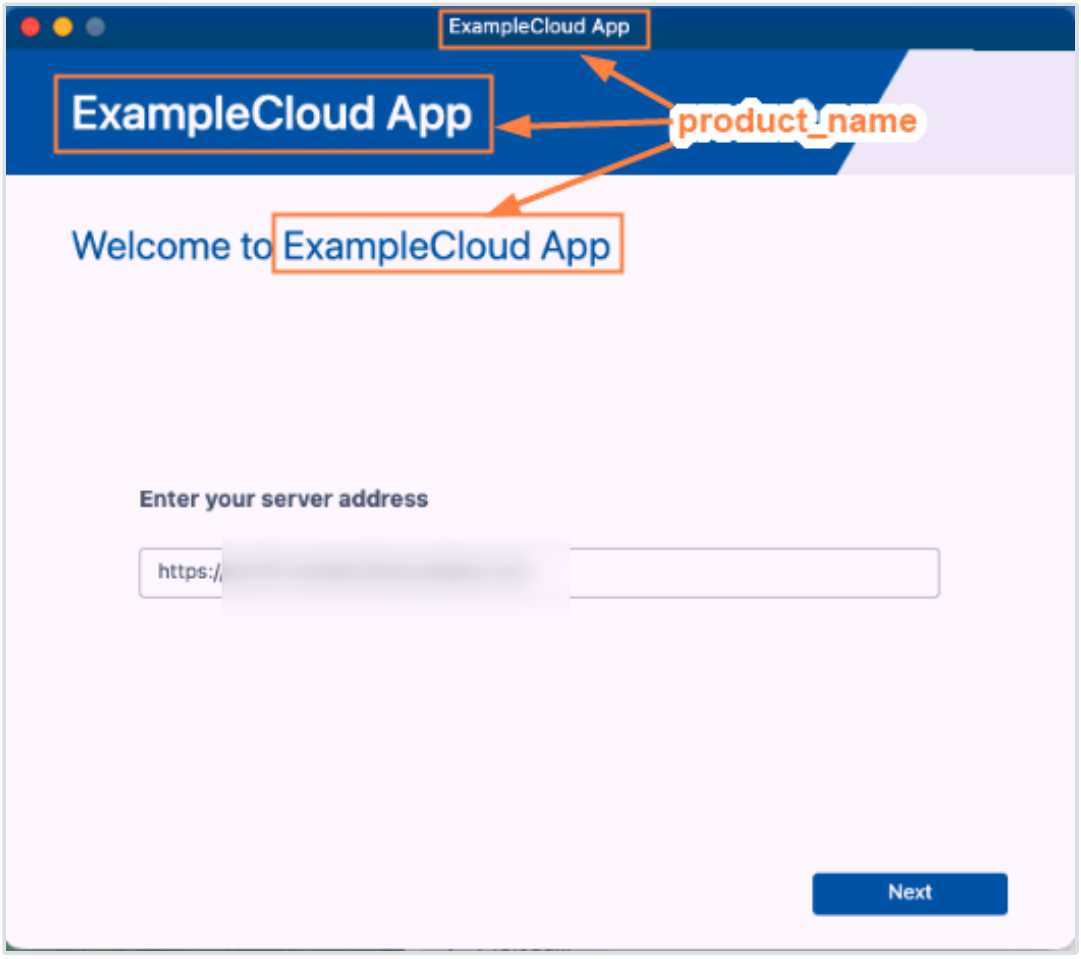
To complete self service white labeling, create your JSON file in the format shown below and install it on your user's FileCloud Desktop for Windows clients using mass deployment.

To initially create the JSON file:

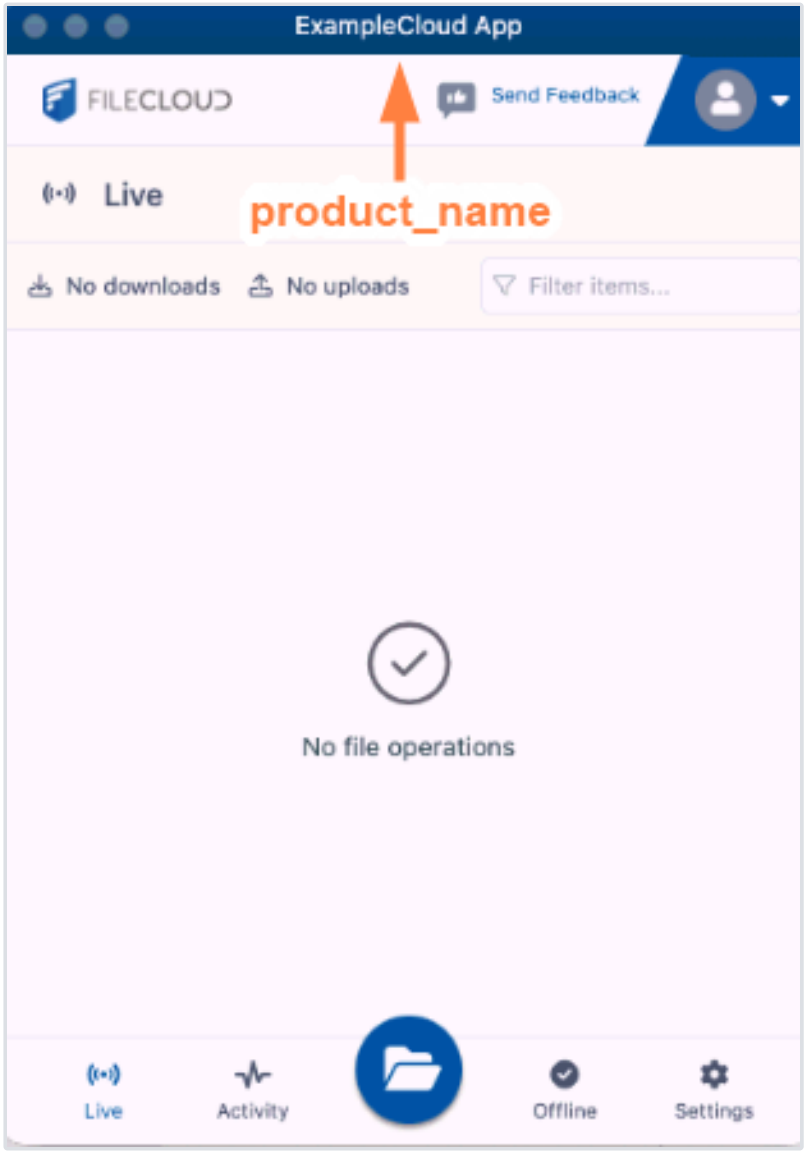
1. In a text editor such as Notepad, create a file with the following contents, but enter your own values for the keys.
   Exclude any of the properties you do not want to customize.

   ```
   {
   "product_name": "ExampleCloud App",
   "short_company_name": "MyCompany"
   "upgrade_url": "https://www.example.com/download/",
   "support_docs_url": "https://www.example.com/doc/",
   "display_name_shell": "ExampleCloud"
   }
   ```

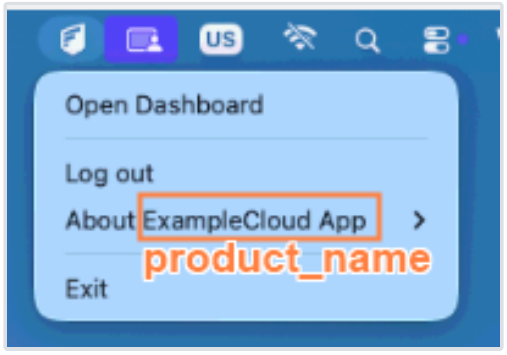
   The fields appear in the following locations in FileCloud:
   product_name - Log-in wizard, dashboard, Help pop-up
   short_company_name - Help pop-up
   upgrade_url - Not used in user interface
   support_docs_url - Log-in wizard and Help pop-up
   display_name_shell - Not used in user interface
2. In the macOS finder, go to **/Users/<username>/Library/Application Support**.
3. Create the folder **Cloud Branding** if it doesn't exist already.
4. Save your json file in the **Cloud Branding** folder as **cloud_storage_branding.json**.
5. When users open or restart FileCloud Desktop, they will see your customizations in the following locations:
   - Login Wizard



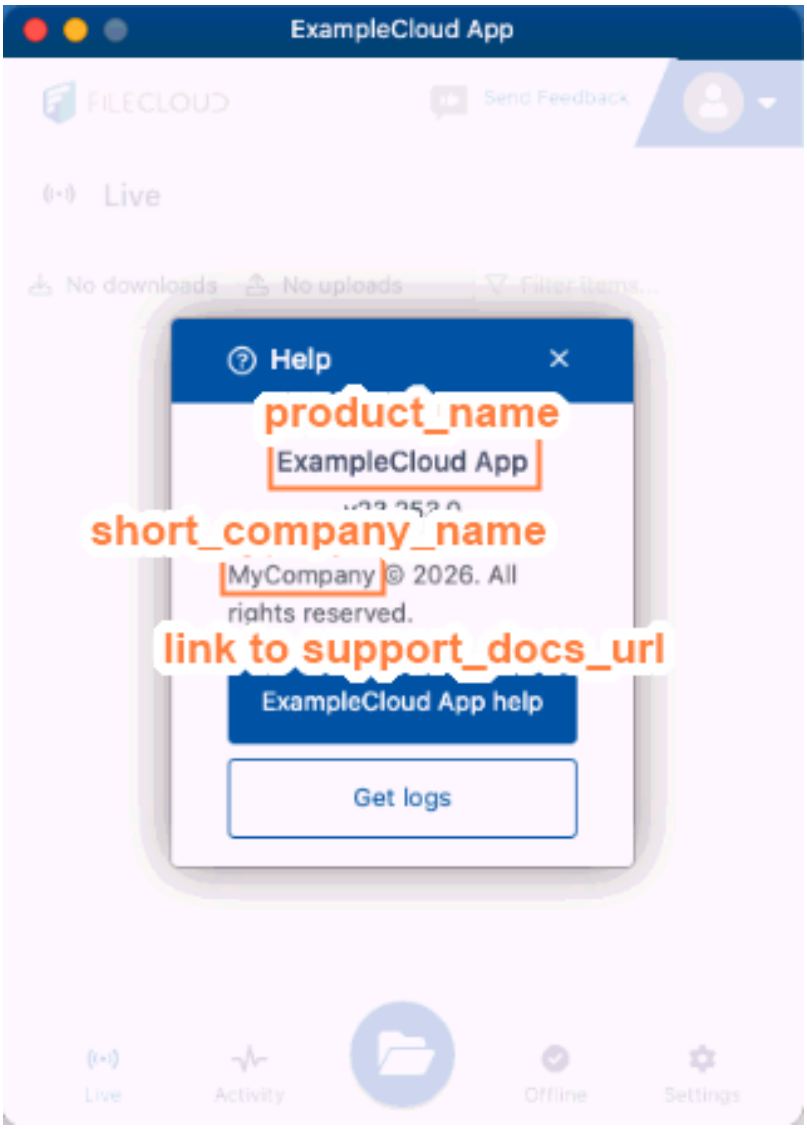
- Title bar in dashboard



- Menu for icon in toolbar



- Help popup


ExampleCloud App
Send Feedback
Live
No downloads
No uploads
Filter items...
Help
product_name
ExampleCloud App
short_company_name
MyCompany © 2026. All rights reserved.
link to support_docs_url
ExampleCloud App help
Get logs
Live
Activity
Offline
Settings

FileCloud Sync

Sync Requirements:

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

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

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

FileCloud Sync supports Mac versions OSX 10.14 and above.

Install and Log In to FileCloud Sync

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

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

Windows

Mac OSX

Linux

Install Sync on Mac OSX

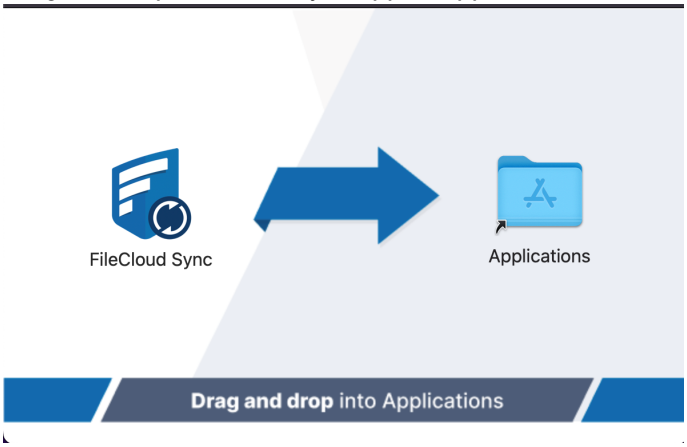
FileCloud for Office is an MS Office add-in for Word, Excel, and PowerPoint which can be used in both Windows and macOS with FileCloud Sync, FileCloud Drive, and FileCloud Desktop. It is available in FileCloud beginning with version 23.1.
For instructions on how to install FileCloud for Office, see Using FileCloud for Office.

- FileCloud Sync installers do not create a Sync desktop shortcut. However, users can create the shortcut manually.

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

To install FileCloud Sync on macOS:

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



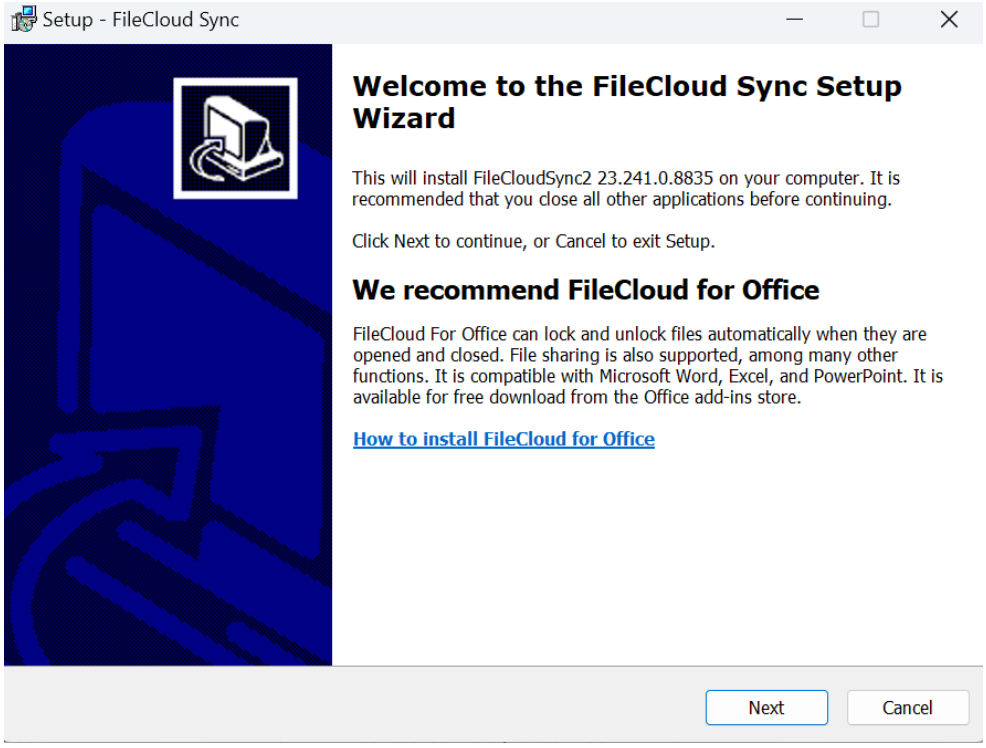
4. Go to Applications and open the FileCloud Sync App.

Install Sync on Windows

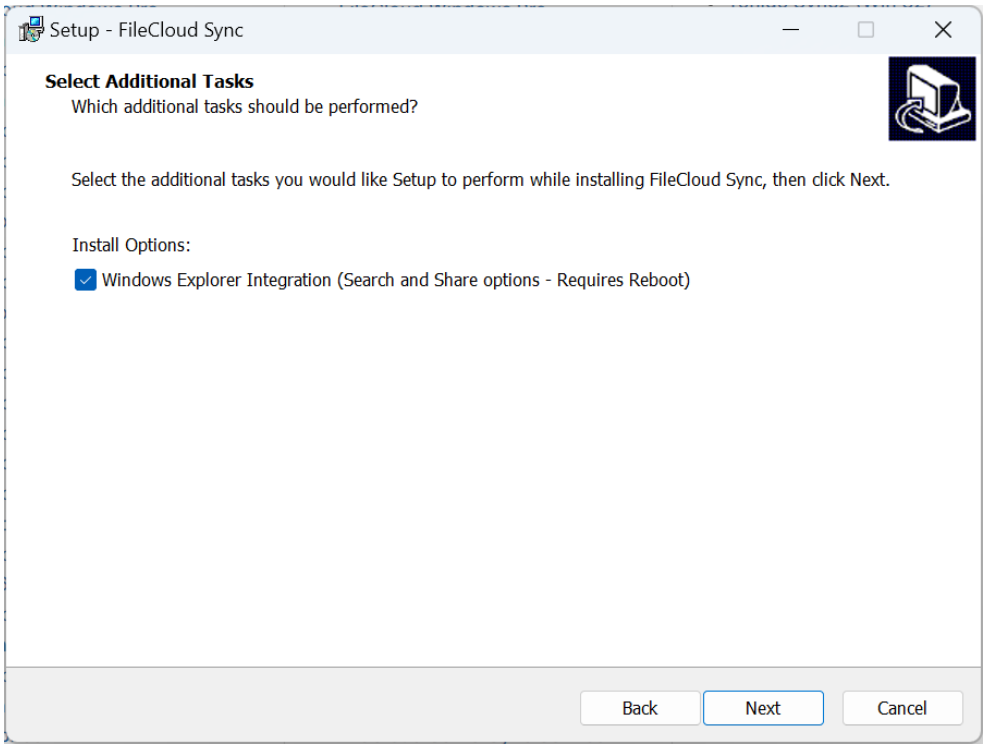
You must install FileCloud Sync before you can begin synchronizing documents on your local computer to the FileCloud Server site.

To install Sync on Windows:

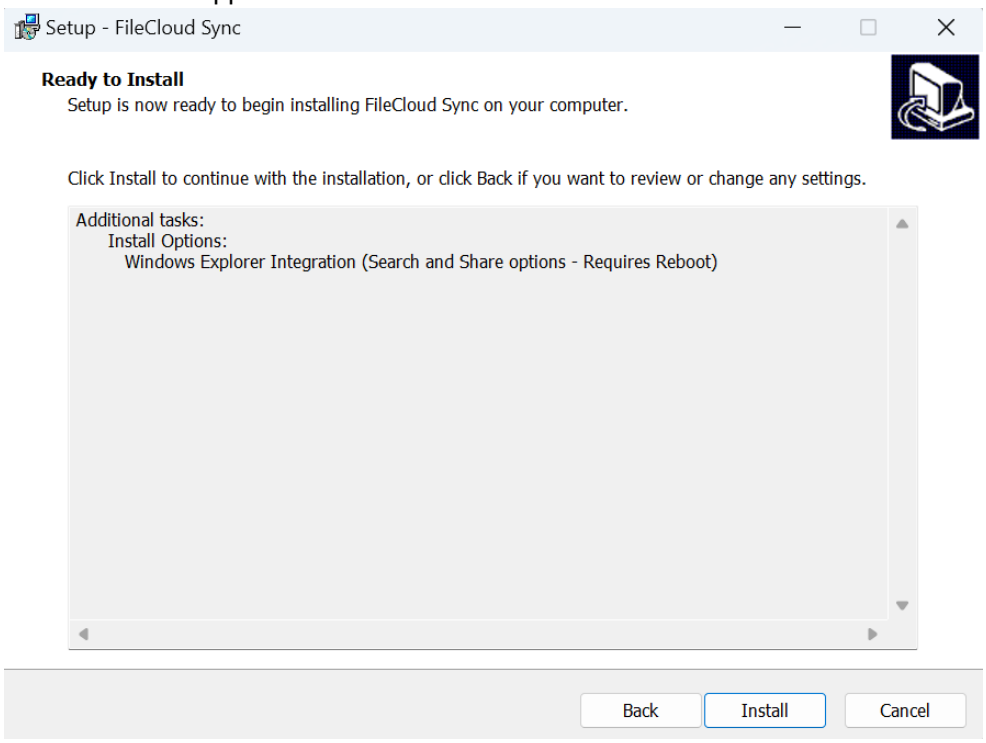
1. Download FileCloud Sync App from https://www.filecloud.com/additional-downloads/#sync
2. After successfully downloading the App, run the execution file FileCloudSync.exe.
   The first screen of the wizard recommends that you use the FileCloud for Office feature.



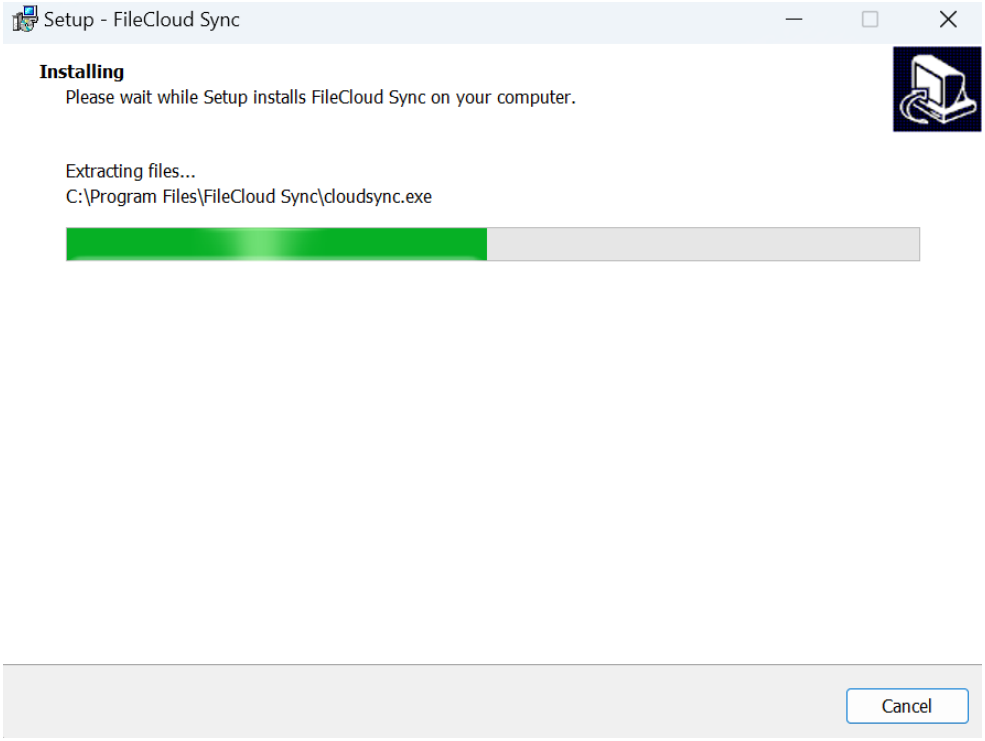
3. Click **Next**.



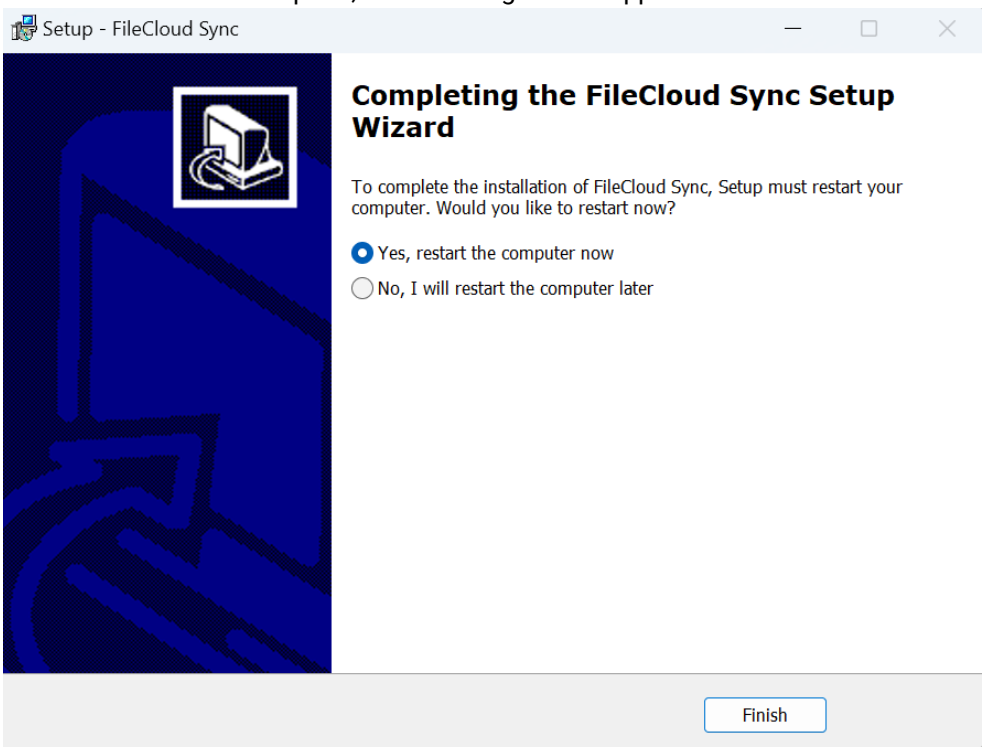
4. Leave the checkbox checked, and click **Next**.
   The next screen appears.



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



When installation is complete, the following screen appears:



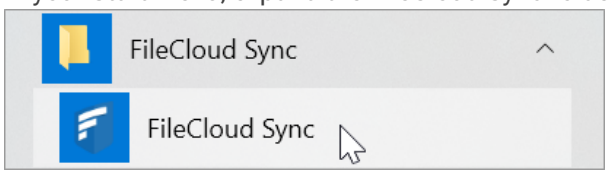
6. Leave **Yes, restart the computer now** selected to restart your computer and begin using Sync or the latest version of Sync, and click **Finish**.

Start and Log In to Sync

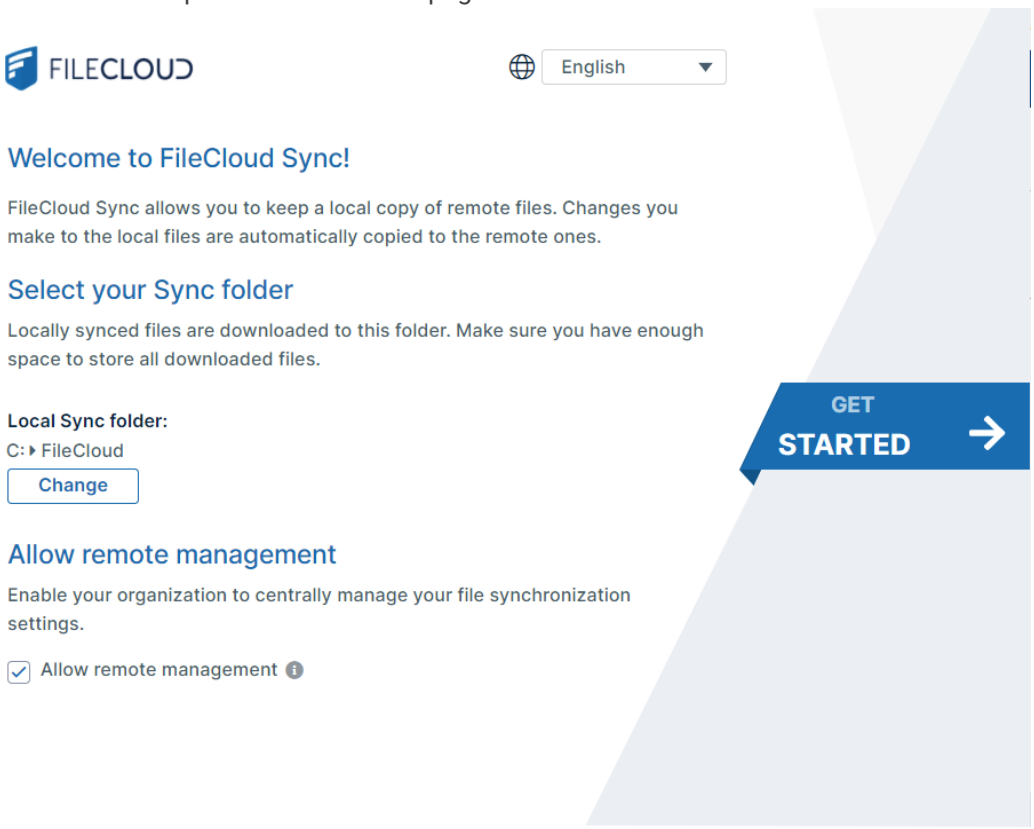
After you install Sync and restart your computer if necessary, you must provide your FileCloud account information to Sync.

To start and log in to Sync:

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



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

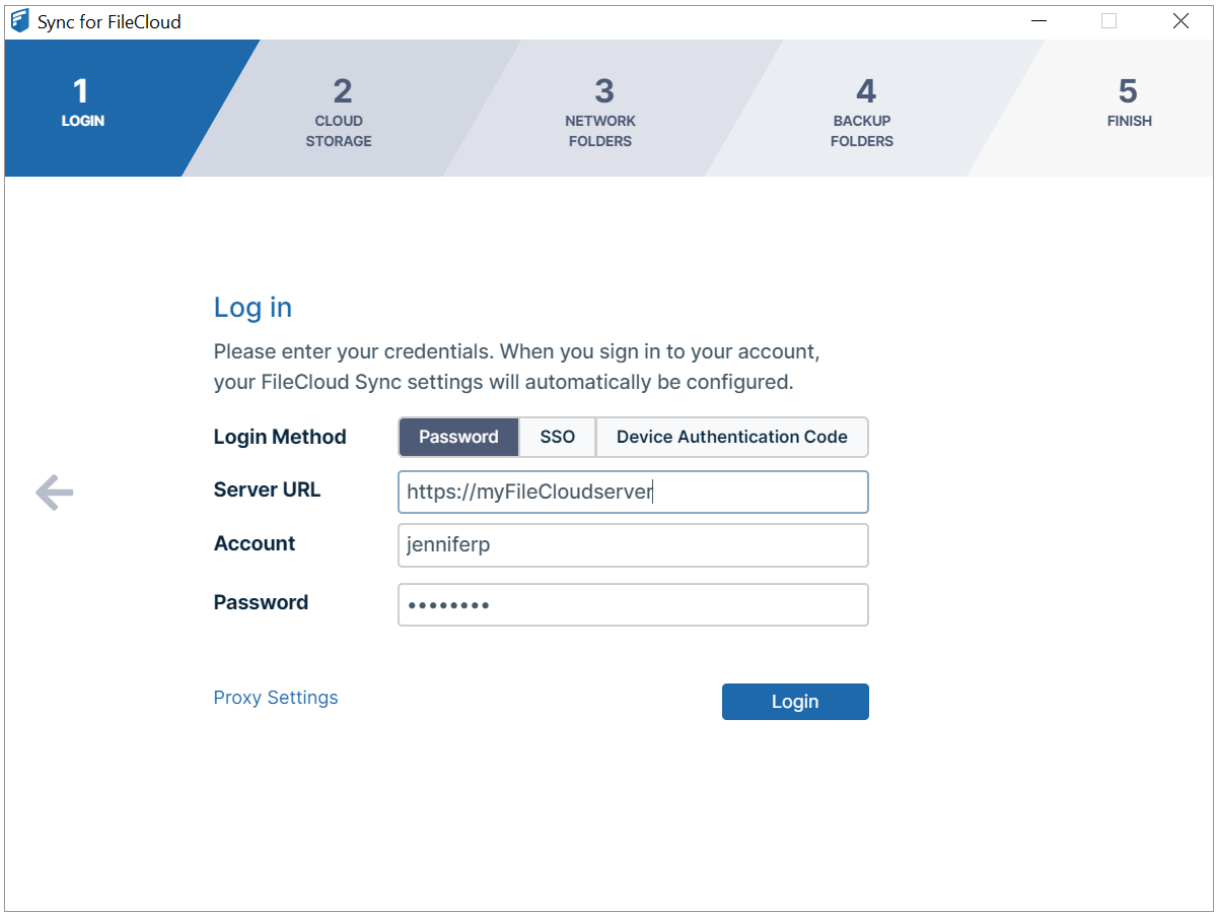


   By default, the user interface language is English, the sync folder is your local FileCloud folder, and remote management is enabled.

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

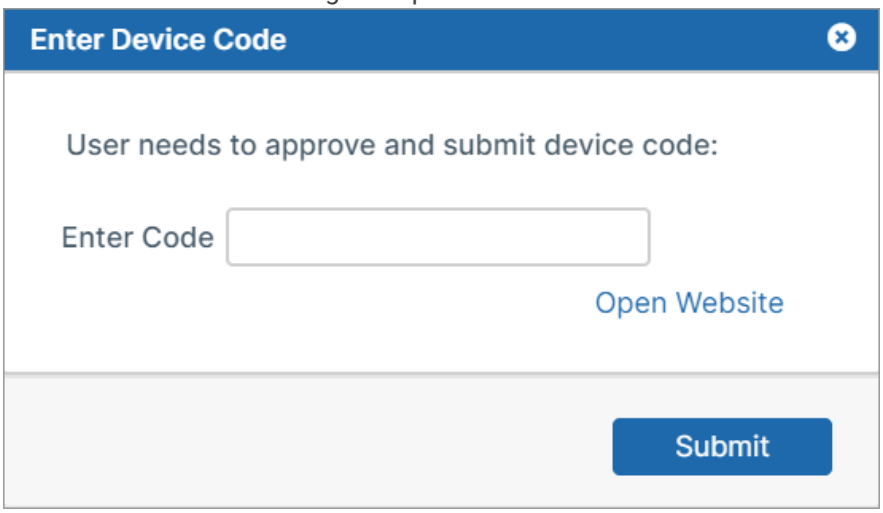
Step 1 Log In

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



1. For **Login Method**, leave the default of **Password**, or choose SSO or **Device Authentication Code**.
2. If you use **Password:**
   a. In **FileCloud Sync Server URL**, type the address of yourFileCloud server.
   b. In **Account** and **Password**, type in the credentials that were sent to you when your FileCloud account was created.
   c. Click **Log in**.
3. If you choose **SSO** (single sign-on), type the address to the FileCloud server that was sent to you when your FileCloud account was created.
   You are redirected to the **SSO Login** page, where you can enter your username and SSO password to log in.
4. If you choose **Device Authentication code**,
   a. In **FileCloud Sync Server URL**, type the address of your FileCloud server.
   b. In **Account**, type in the username that was sent to you when your FileCloud account was created.

An **Enter Device Code** dialog box opens.



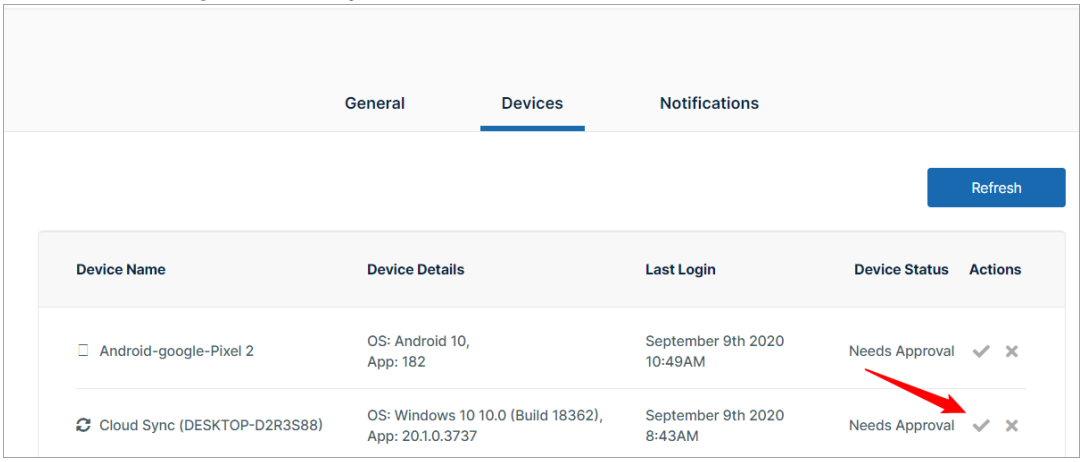
c. Click **Open Website**.
The log-in screen of the user portal opens.

d. Log-in to the user portal.

e. In the upper-right corner of the screen, click your username and choose **Settings**.

f. In the **Settings** screen, click **Devices**.

g. Next to the listing for Cloud Sync, click the check.



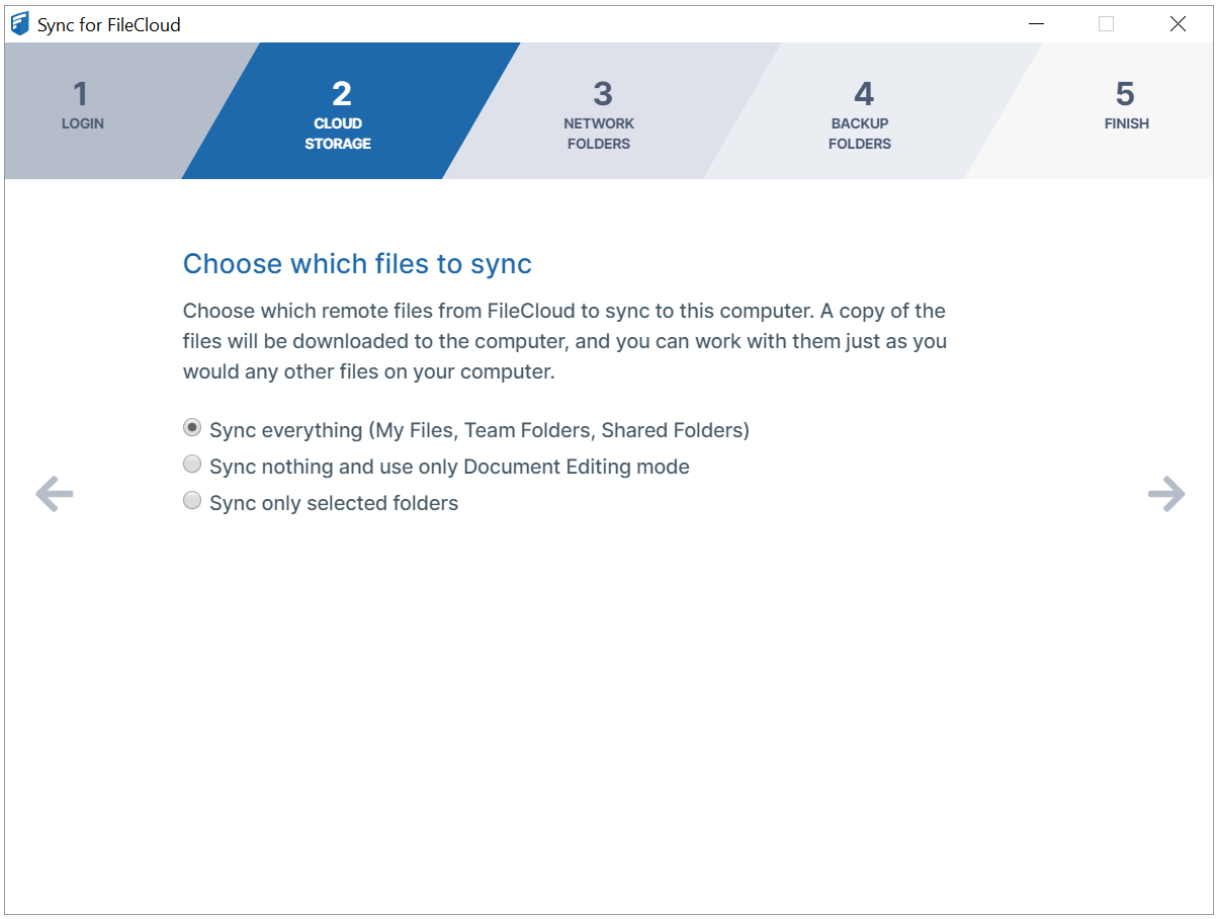
A dialog box with the device authentication code opens.

h. Enter the authentication code into the **Enter Device Code** dialog box, and click **Submit**.

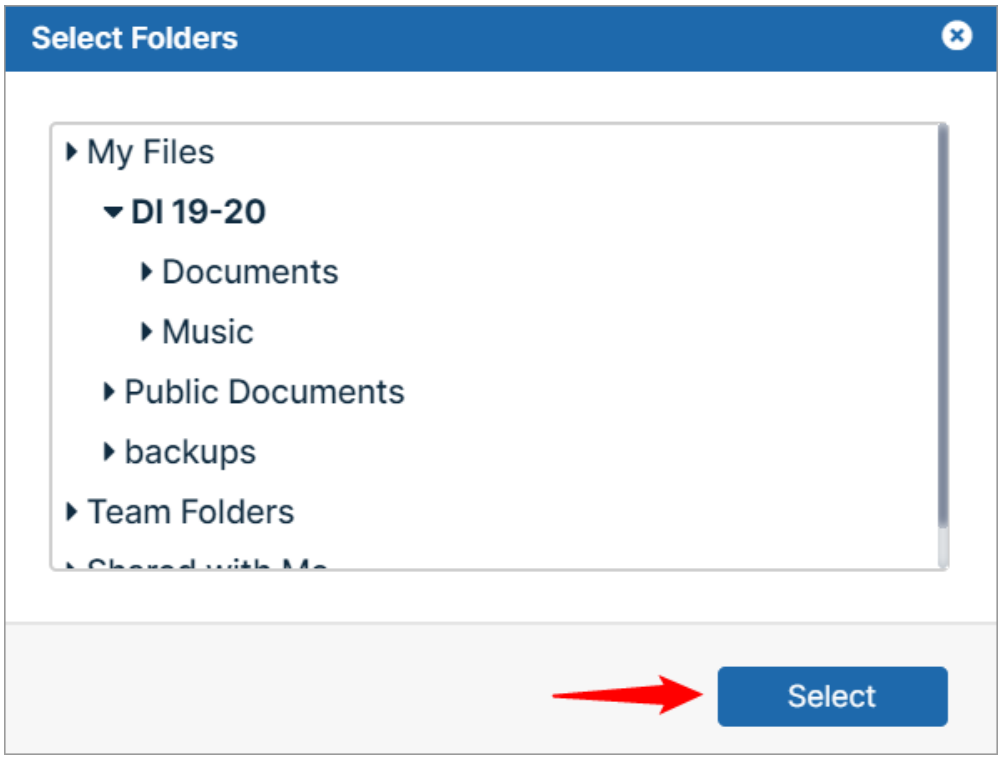
5. Or enter Proxy settings.
The window for Step 2, Cloud Storage opens.

Step 2 Choose which cloud folders to sync

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



1. Choose:
   - **Sync Everything** to sync all of your FileCloud files and folders.
   - **Sync nothing and use only Document Editing mode** to use Sync to edit your FileCloud files from your desktop without syncing changes with FileCloud.
   - **Sync only selected folders** to choose which folders' content to sync. If you choose this option, you are prompted to choose the folders to sync.
     i. Click **Add Folders**.
     The **Select Folders** dialog box opens.
     ii. For each folder that you want to sync, in **My Files**, **Team Folders**, or **Shared with Me**, navigate down to the folder, and choose **Select**.

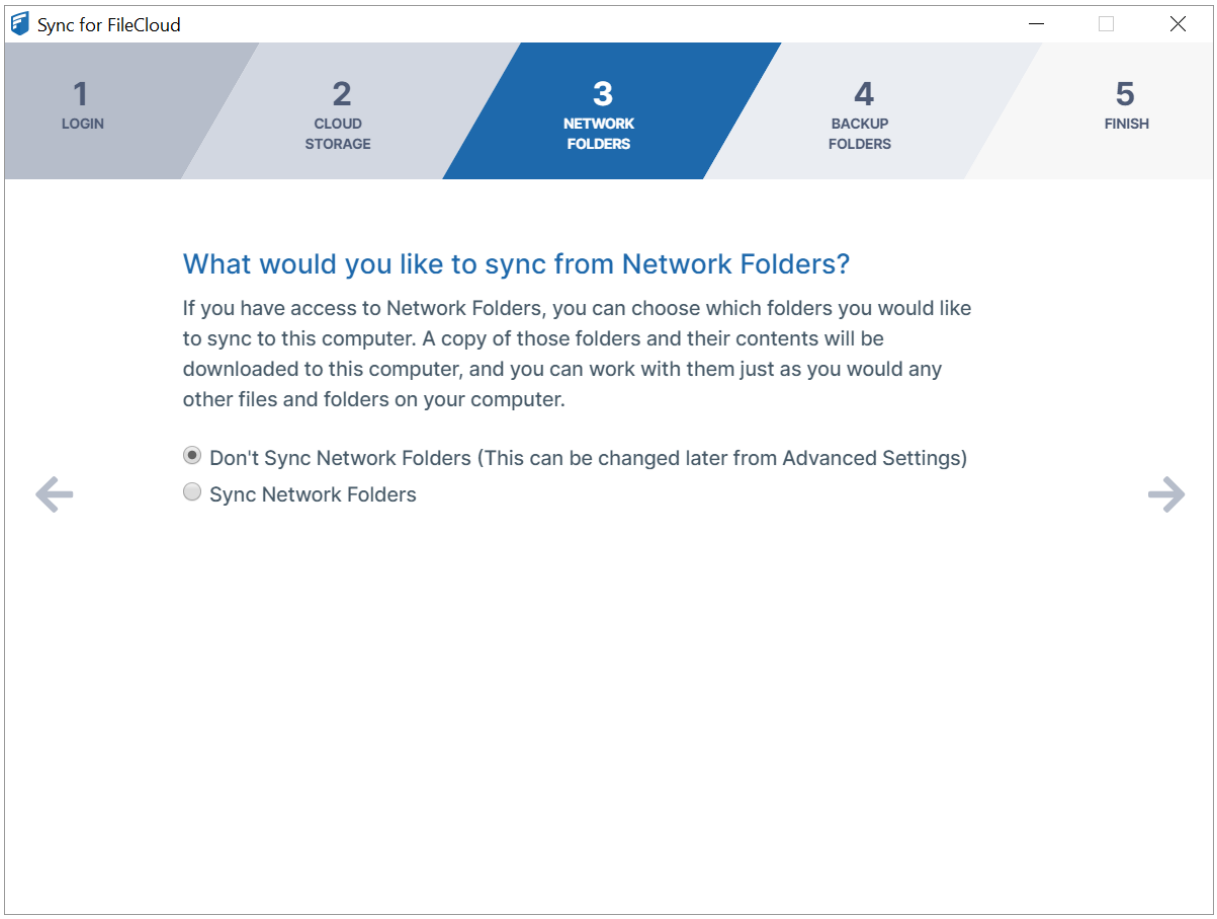


2. Click the right arrow to go to the window for Step 3, Network Folders.

After installation, you can change your sync options.

Step 3 Sync Network Folders

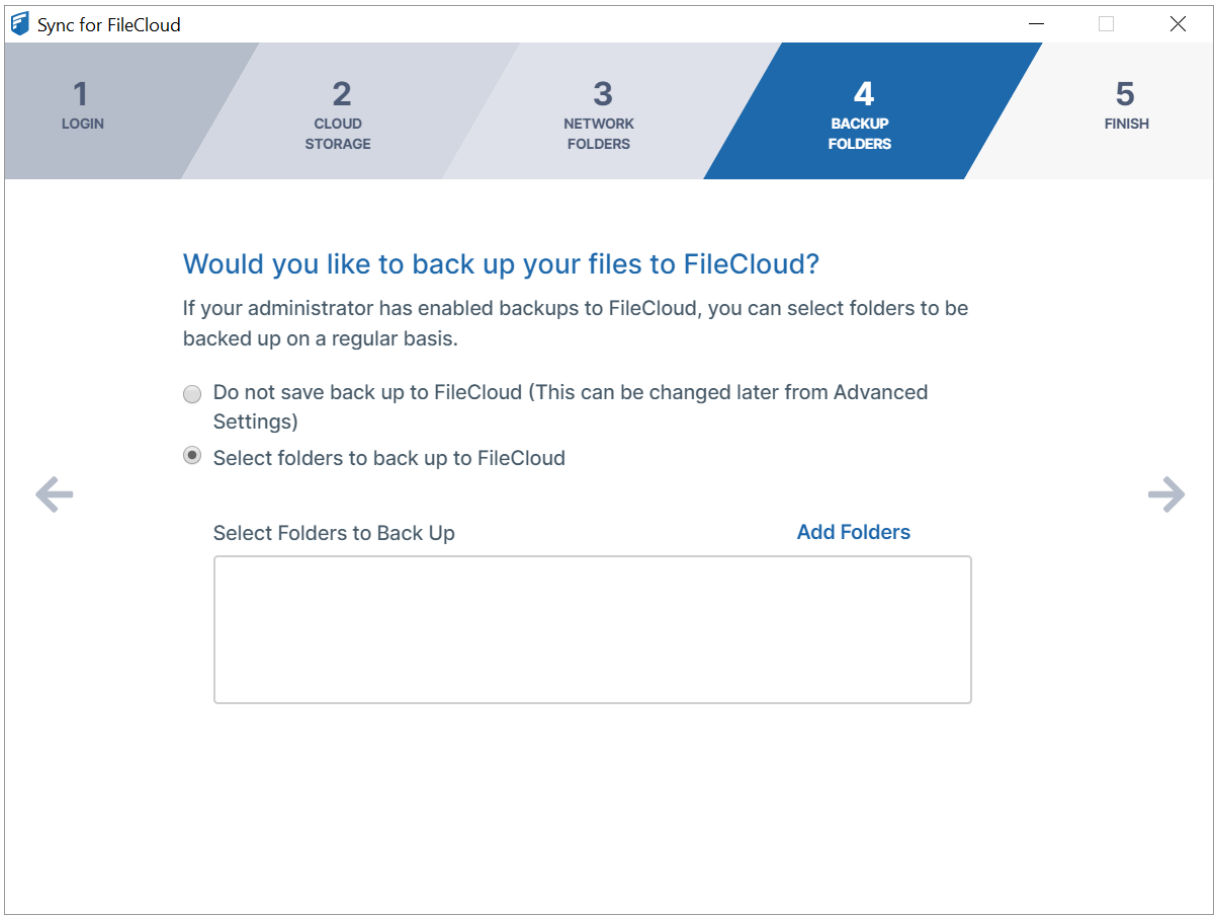
Since Network Folders are not a FileCloud Online feature; check **Don't Sync Network Folders**, and then click the arrow to go to Step 4, Backup Folders**.**



Step 4 Backup Folders

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

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

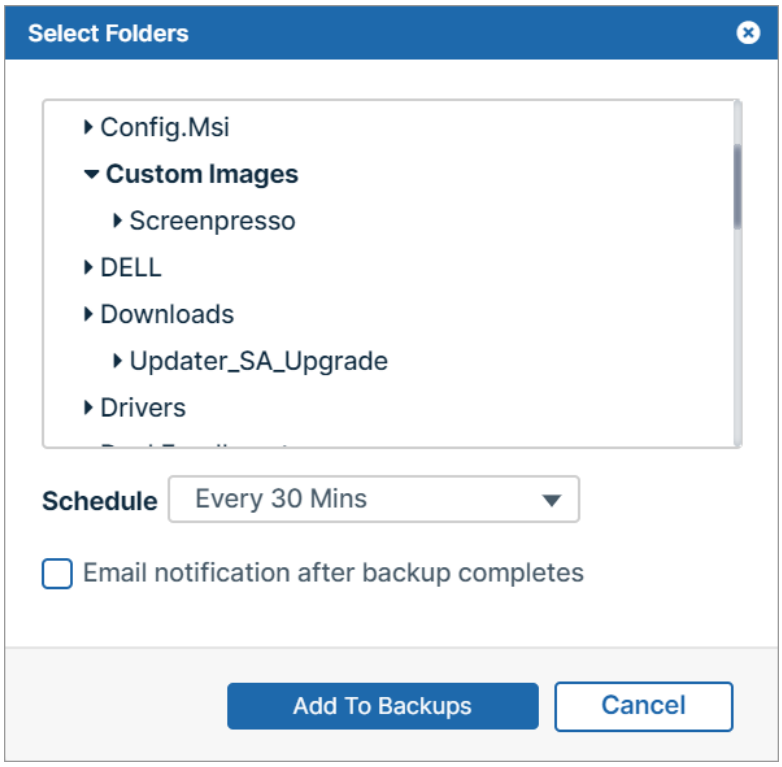


Choose one of the options:

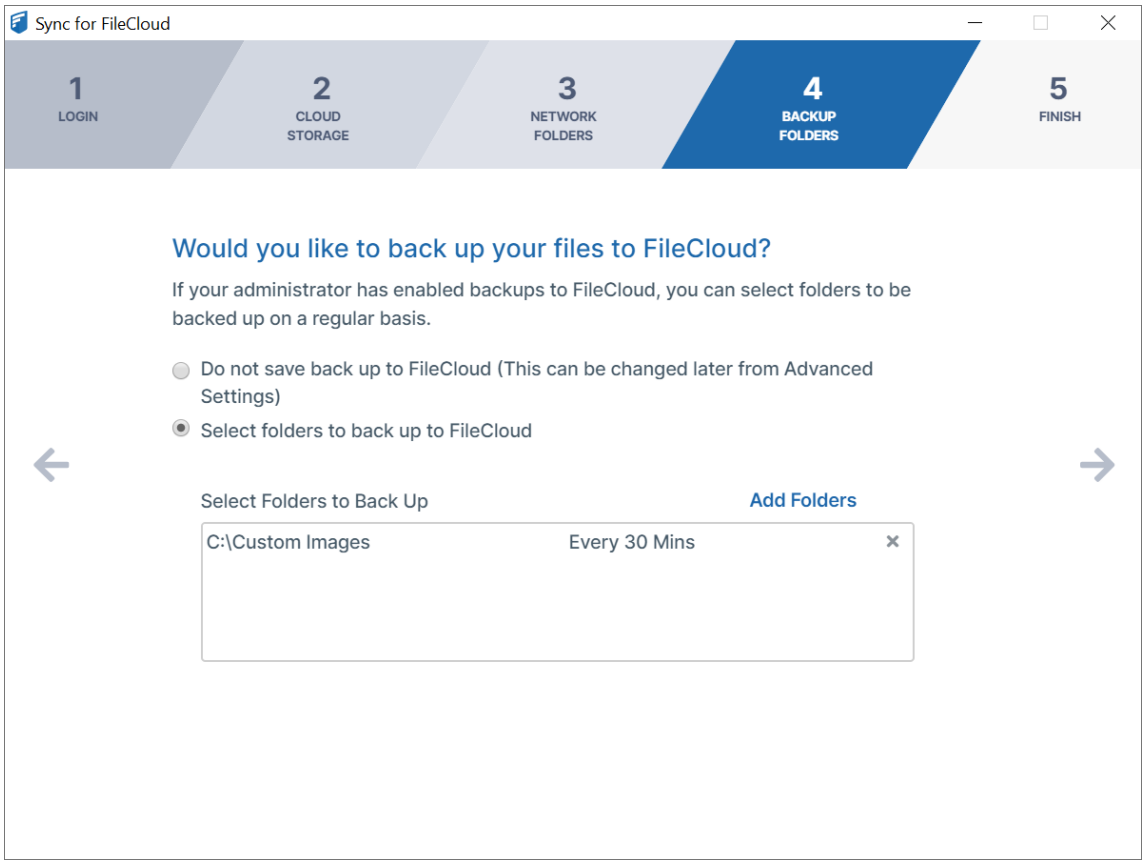
- **Do not save additional backups on FileCloud (This can be changed later from Advanced Settings)**
- **Select folders to back up to FileCloud.**

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

1. Click **Add Folders**.
   The **Select Directory** dialog box opens.
2. Choose the folder that you want to back up.



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

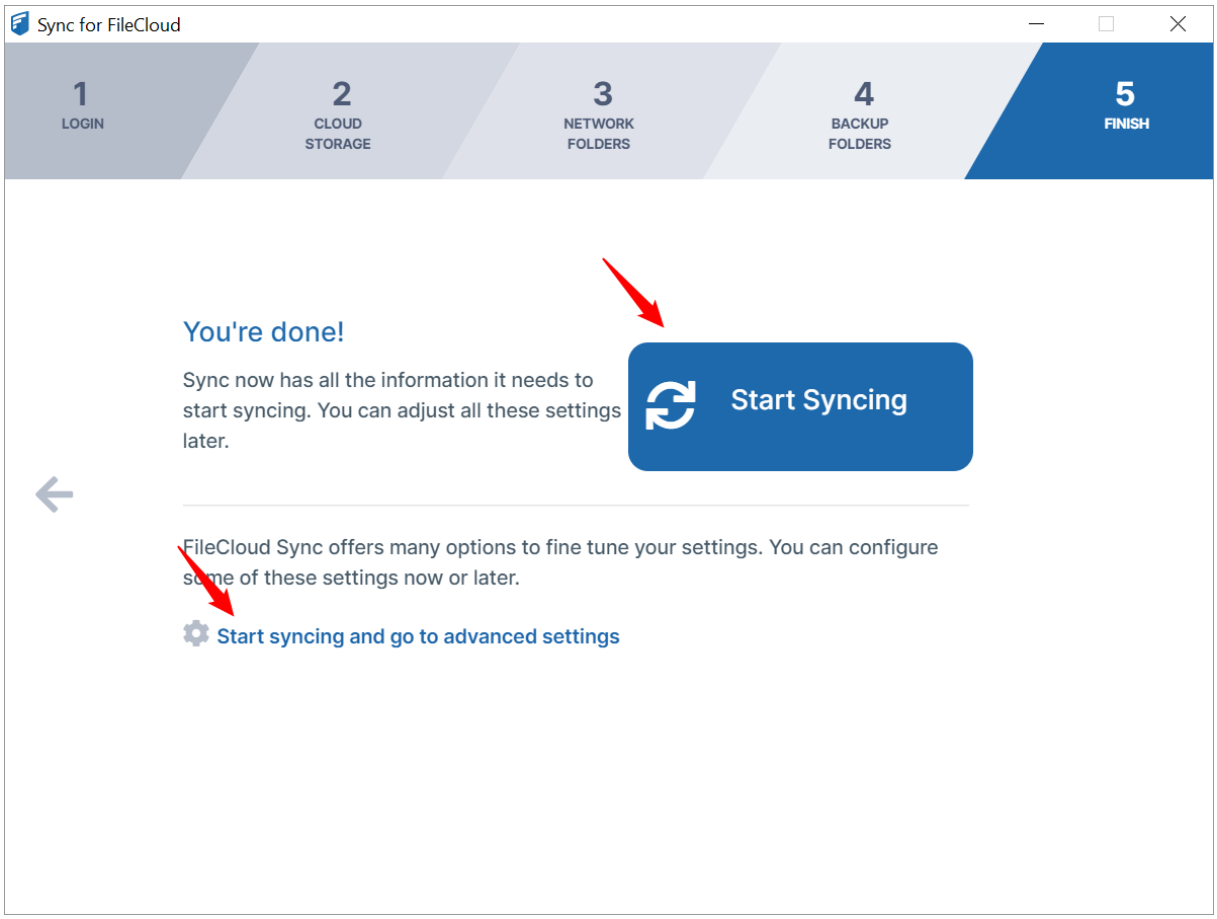


For information about editing settings for backing up folders, see Backing Up Files.

Click the right arrow to go to Step 5 Finish.

Step 5 Start using Sync

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



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

Click **Start syncing and go to advanced settings** to go to the Settings page of the Sync dashboard.

Exiting or Resetting Sync

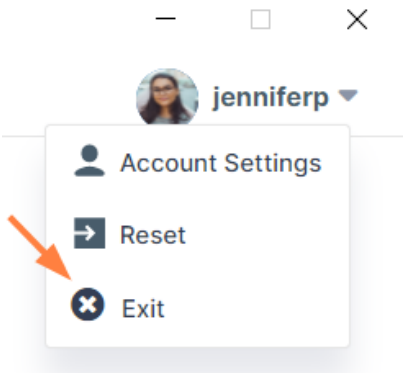
When you exit Sync, your session ends, but your username, password, and configuration settings are saved, so that when you re-open Sync, your settings are automatically filled in.

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

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

To exit Sync

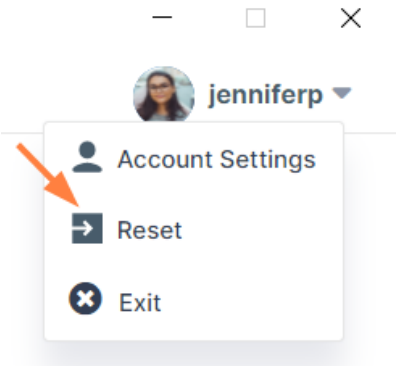
In the mini-dashboard or the main dashboard, in the upper-right corner, click your username and choose **Exit**.



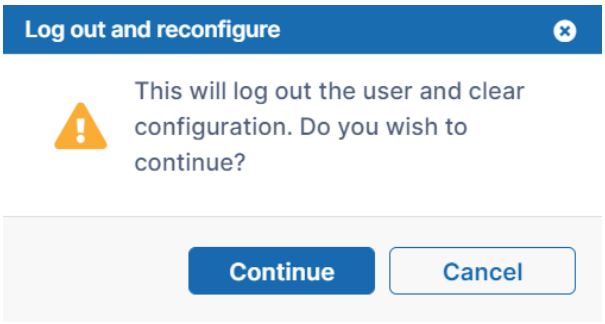
Sync closes, but when you reopen it, you are automatically logged in and your configuration settings are applied.

To reset Sync

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



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

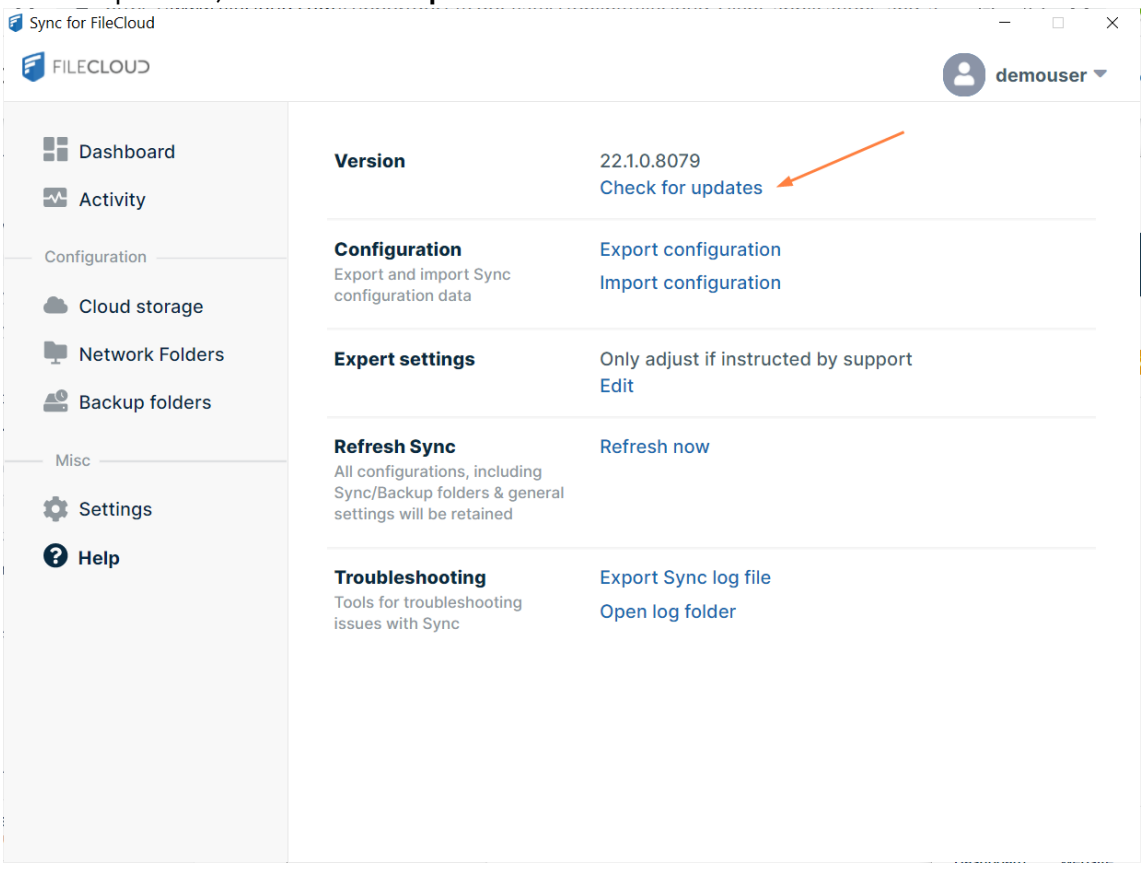


2. Click **Continue**.
   You are logged out of Sync and all of your settings are removed.
   The Get Started page opens.
   In addition to entering your username and password, you are required set up sync folders and sync schedules again.

Checking for Updates to Sync

To check if there are updated versions of Sync:

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



If there are updates to install, you are redirected to the installation link.
If you have the latest version installed, the following message appears at the bottom of the screen:



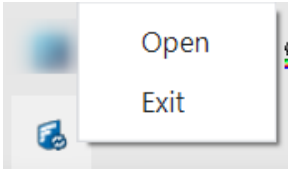
Opening and Using Sync Dashboards

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

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

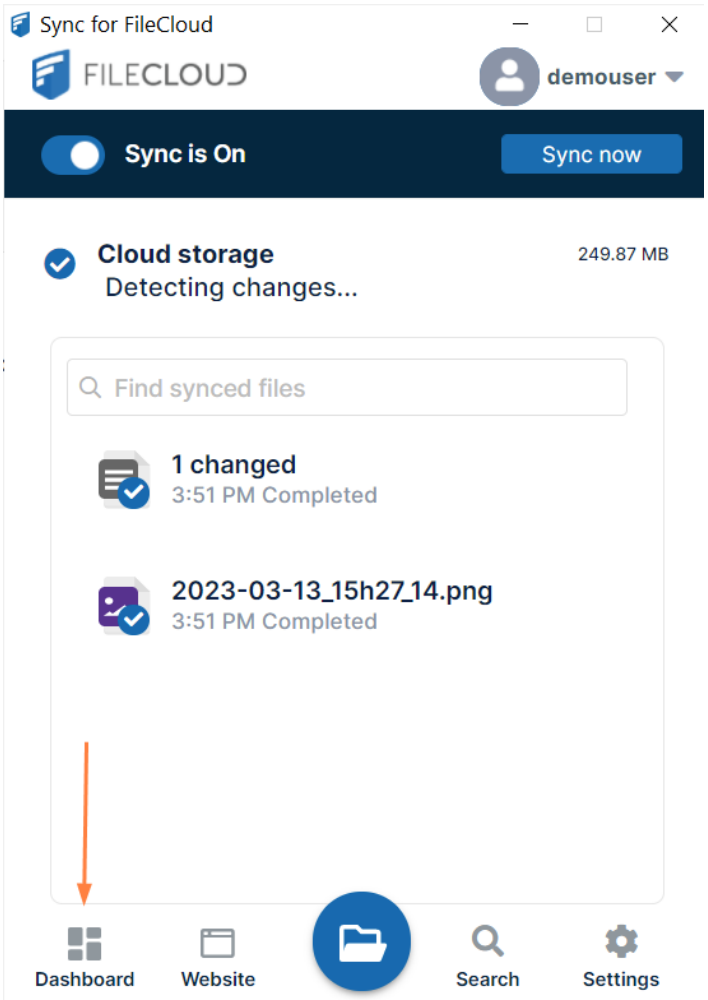
Each time you open Sync, the mini-dashboard opens. From the mini-dashboard, you can access the main dashboard.

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



The mini-dashboard opens.

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

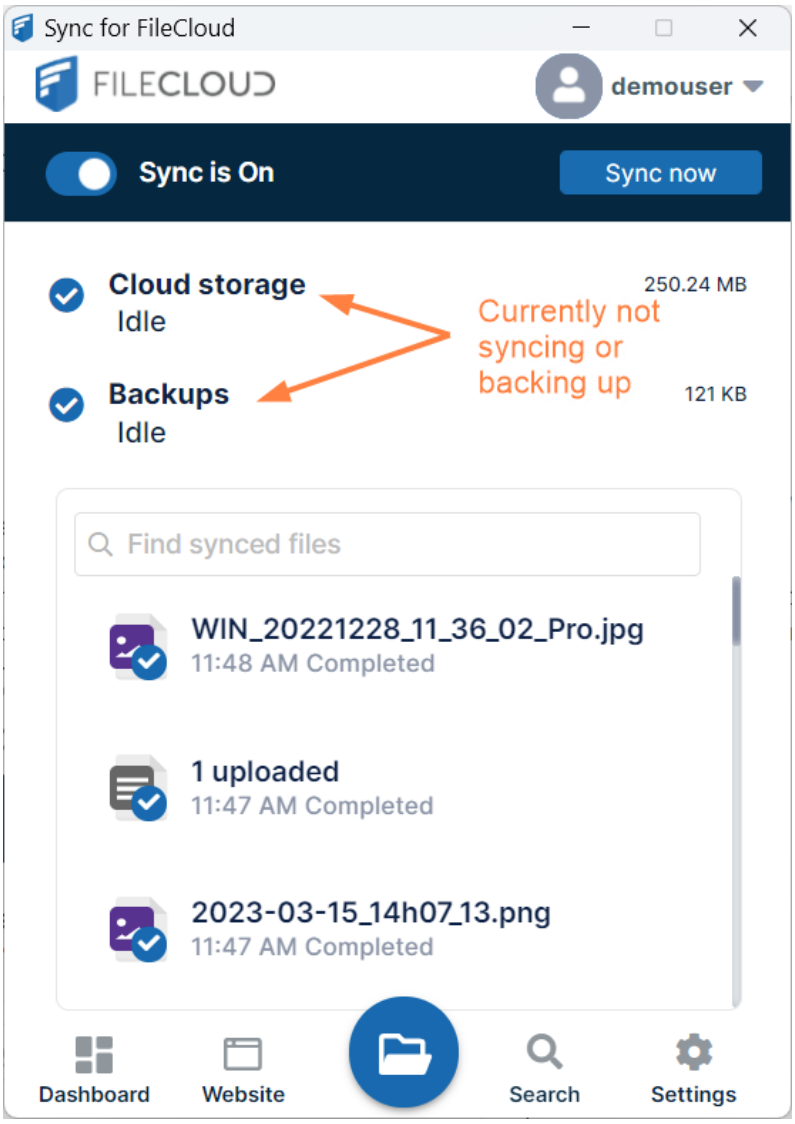


The main dashboard opens:

Working in the Mini-Dashboard

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

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

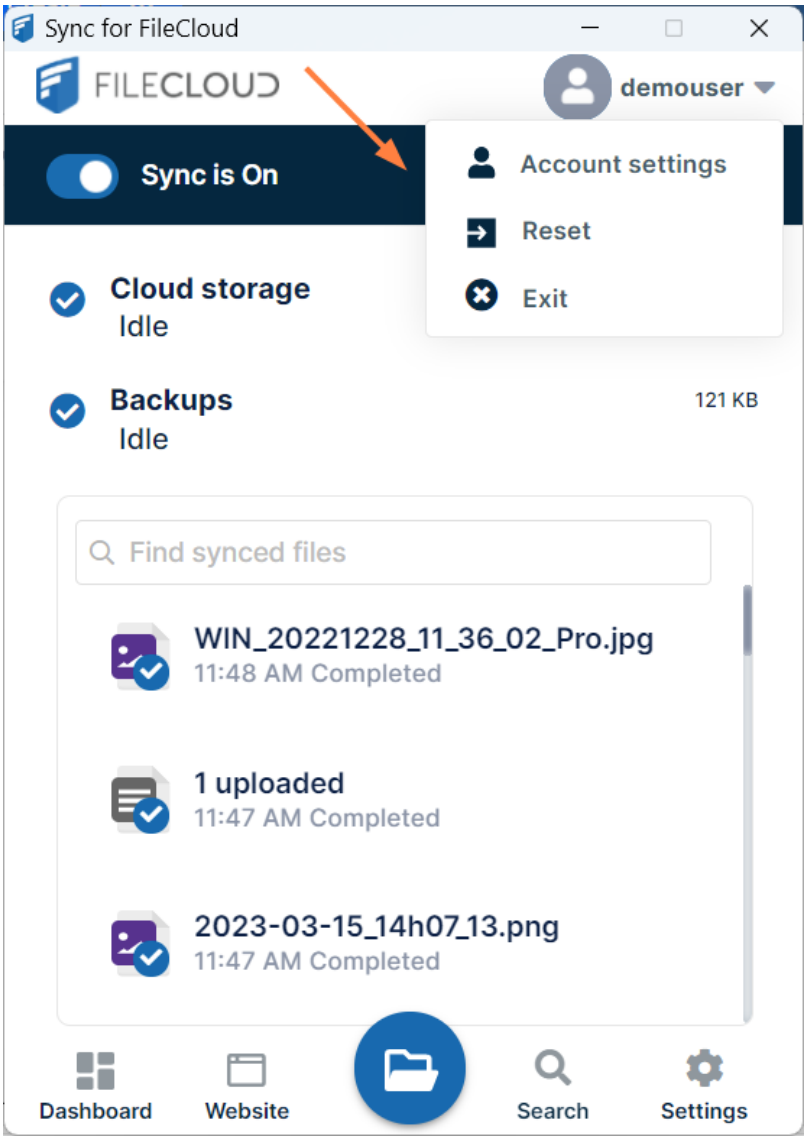


- The mini-dashboard displays a row of icons that you can click to perform actions or go to other locations in the Sync interface

Icon	Action
Dashboard	Opens the main dashboard
Website	Opens FileCloud user portal. You can also open the FileCloud user portal by right-clicking your username in the mini-dashboard or main dashboard and clicking **Account Settings.** In the **Account Settings** screen, click the link to the server URL.

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

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



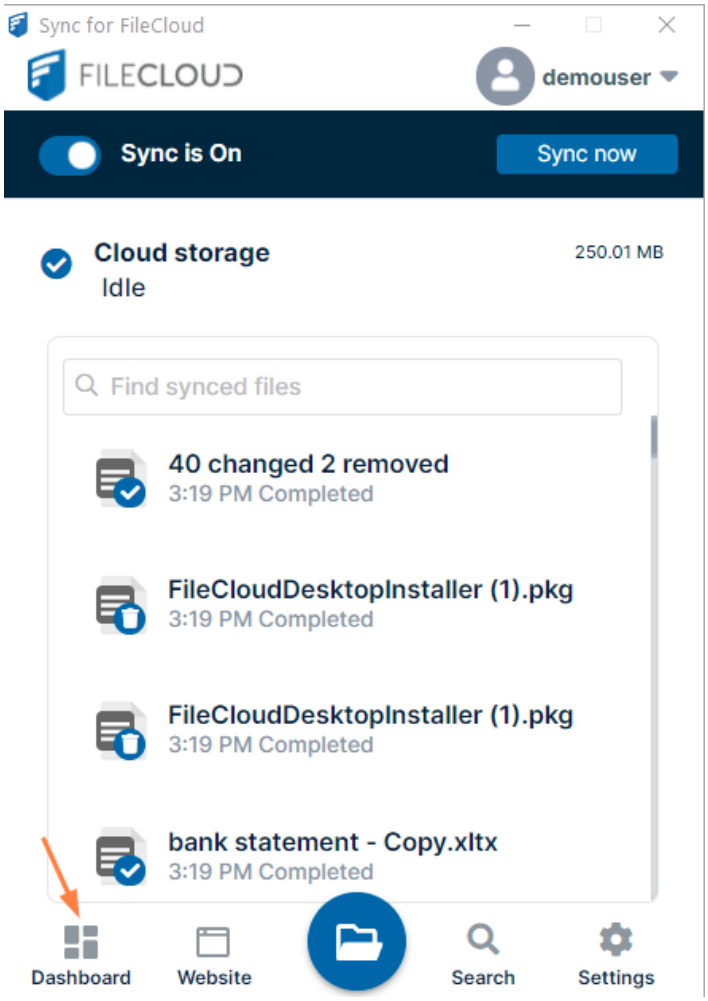
- Click **Account Settings** to go to the **Account Settings** page of the main dashboard
- Click **Reset** to clear your settings.
- Click **Exit** to log out of Sync, but save your settings.

Working in the Main Dashboard

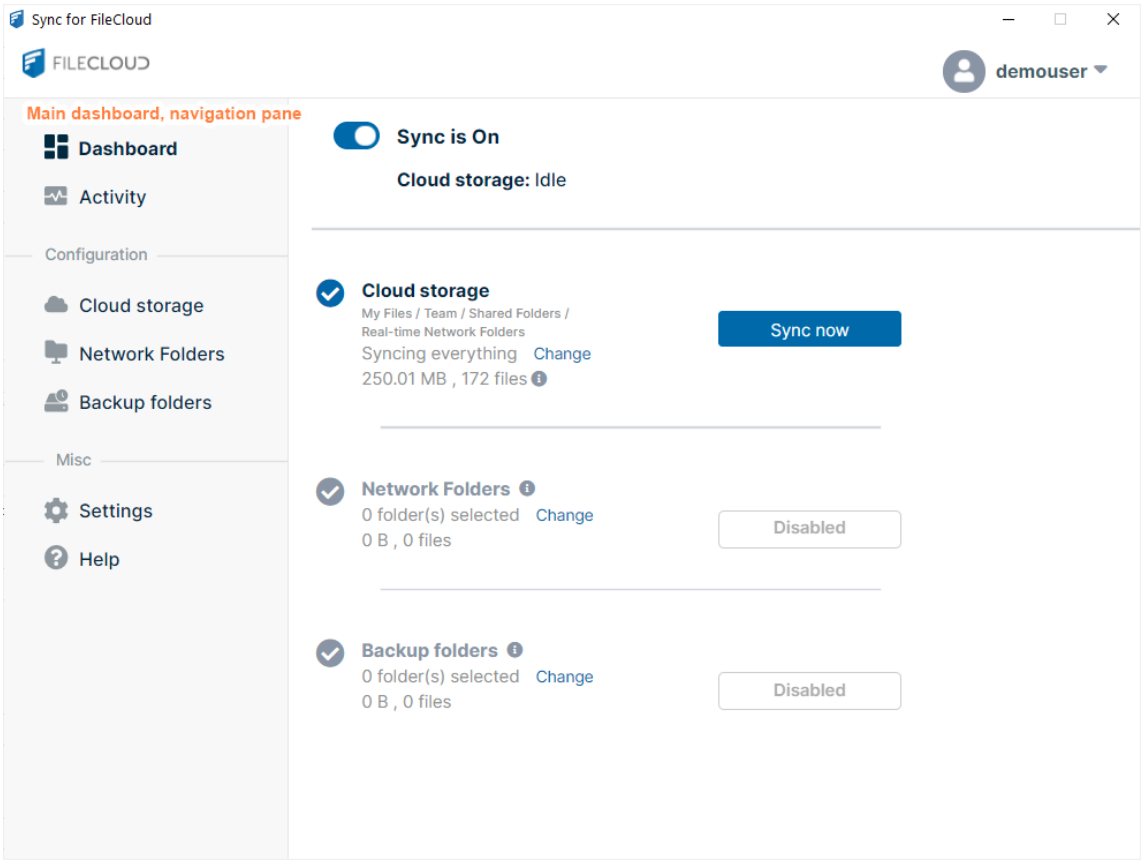
You can sync files and folders, change settings, and review information in the main dashboard.

To access the main dashboard:

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

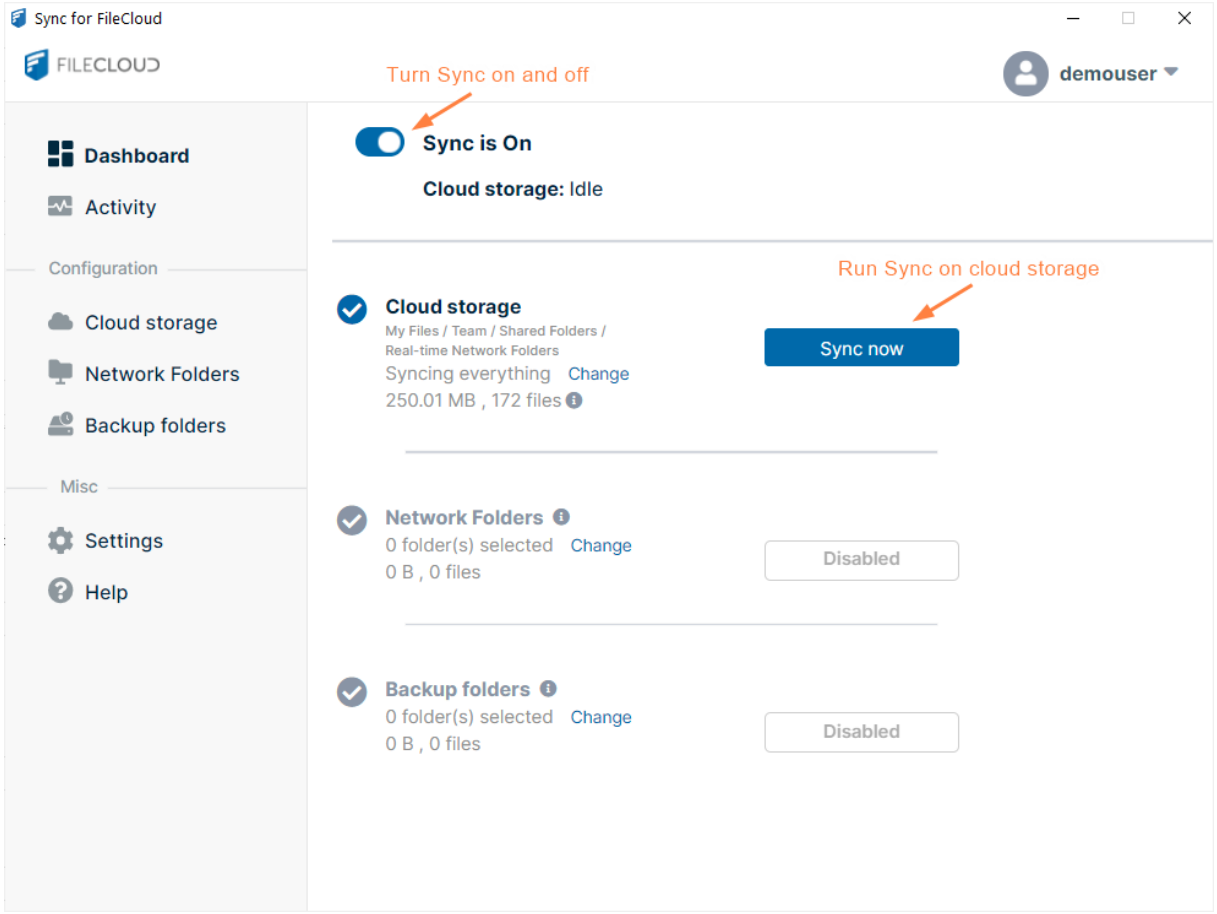


The main dashboard opens. It has several screens, which are listed in the left navigation pane. Click the name of a screen to open it.


Sync for FileCloud
FILECLOUD
demouser
Main dashboard, navigation pane
Dashboard
Activity
Configuration
Cloud storage
Network Folders
Backup folders
Misc
Settings
Help
Sync is On
Cloud storage: Idle
Cloud storage
My Files / Team / Shared Folders / Real-time Network Folders
Syncing everything Change
250.01 MB , 172 files
Sync now
Network Folders
0 folder(s) selected Change
0 B , 0 files
Disabled
Backup folders
0 folder(s) selected Change
0 B , 0 files
Disabled

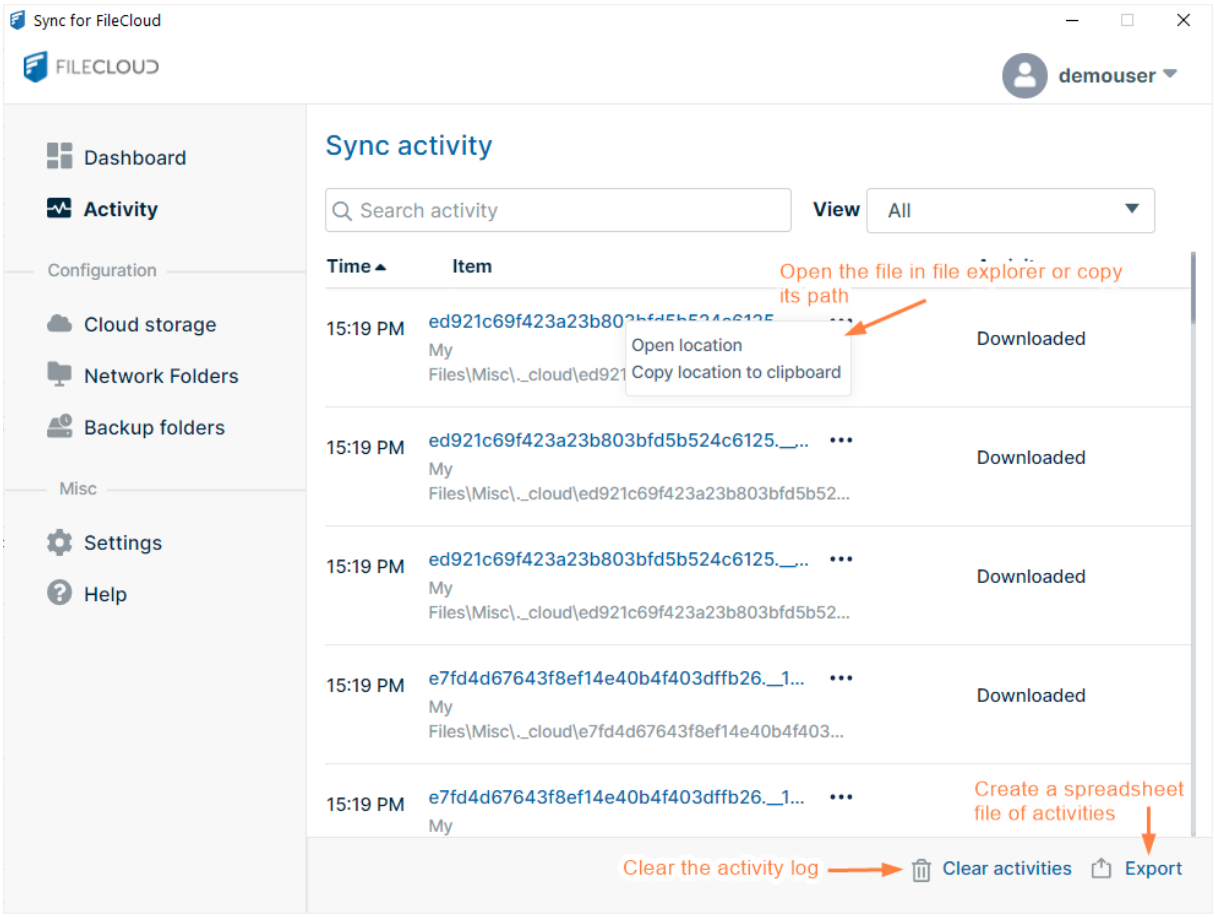
Dashboard screen

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



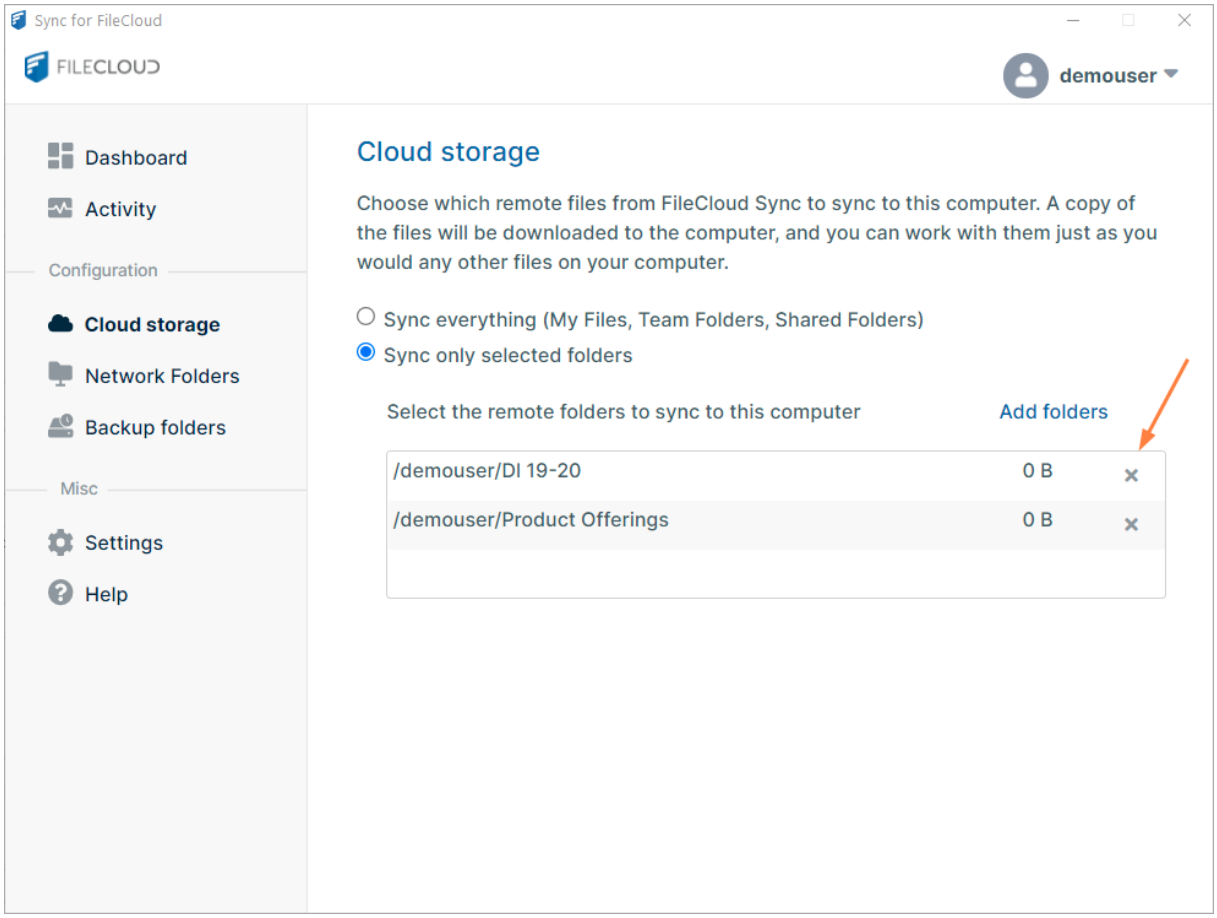
Activity screen

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



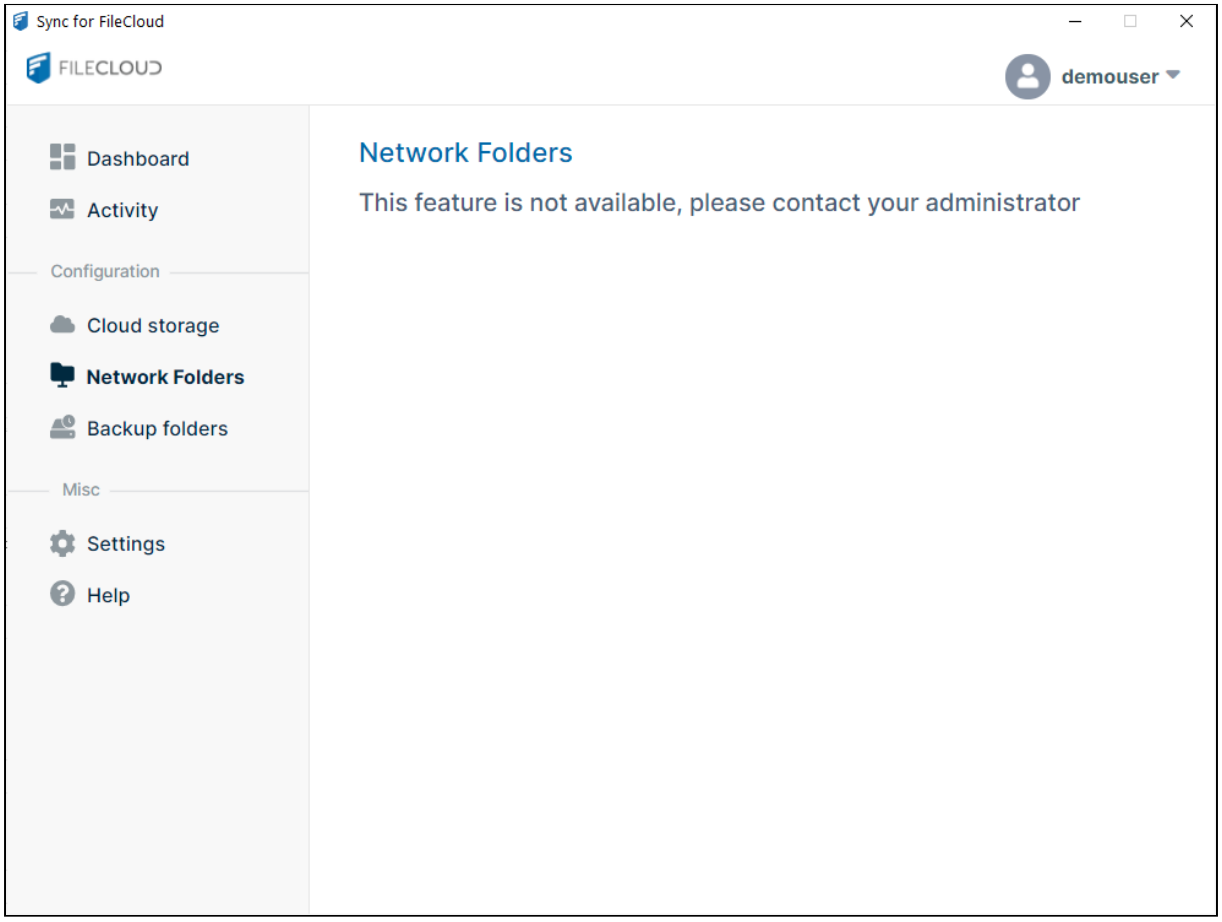
Cloud Storage screen

The **Cloud storage** screen enables you to view and change your Sync settings for FileCloud content in **My Files**, **Team Folders**, and **Shared with Me**.
For more information, see Cloud Storage: Selective Folder Sync.



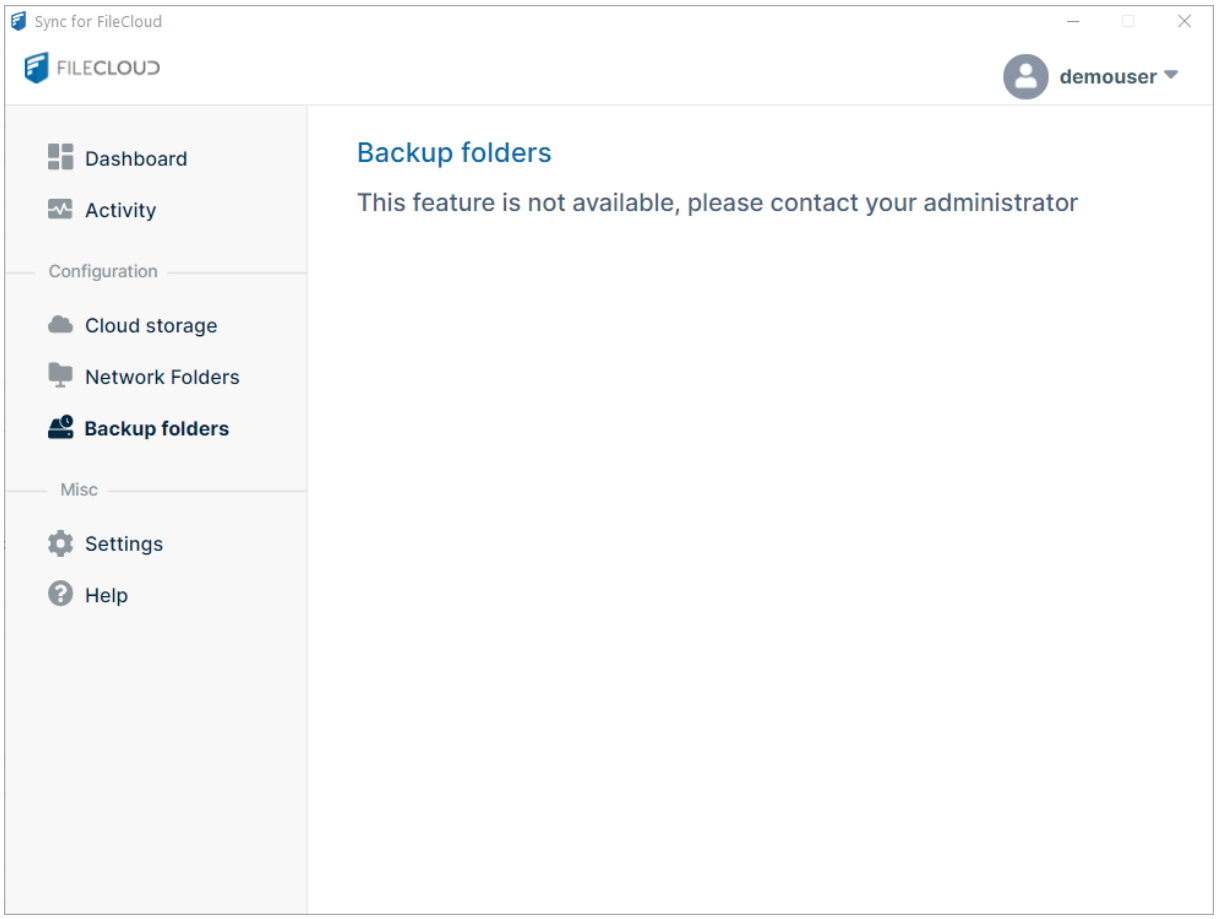
Network Folders screen

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



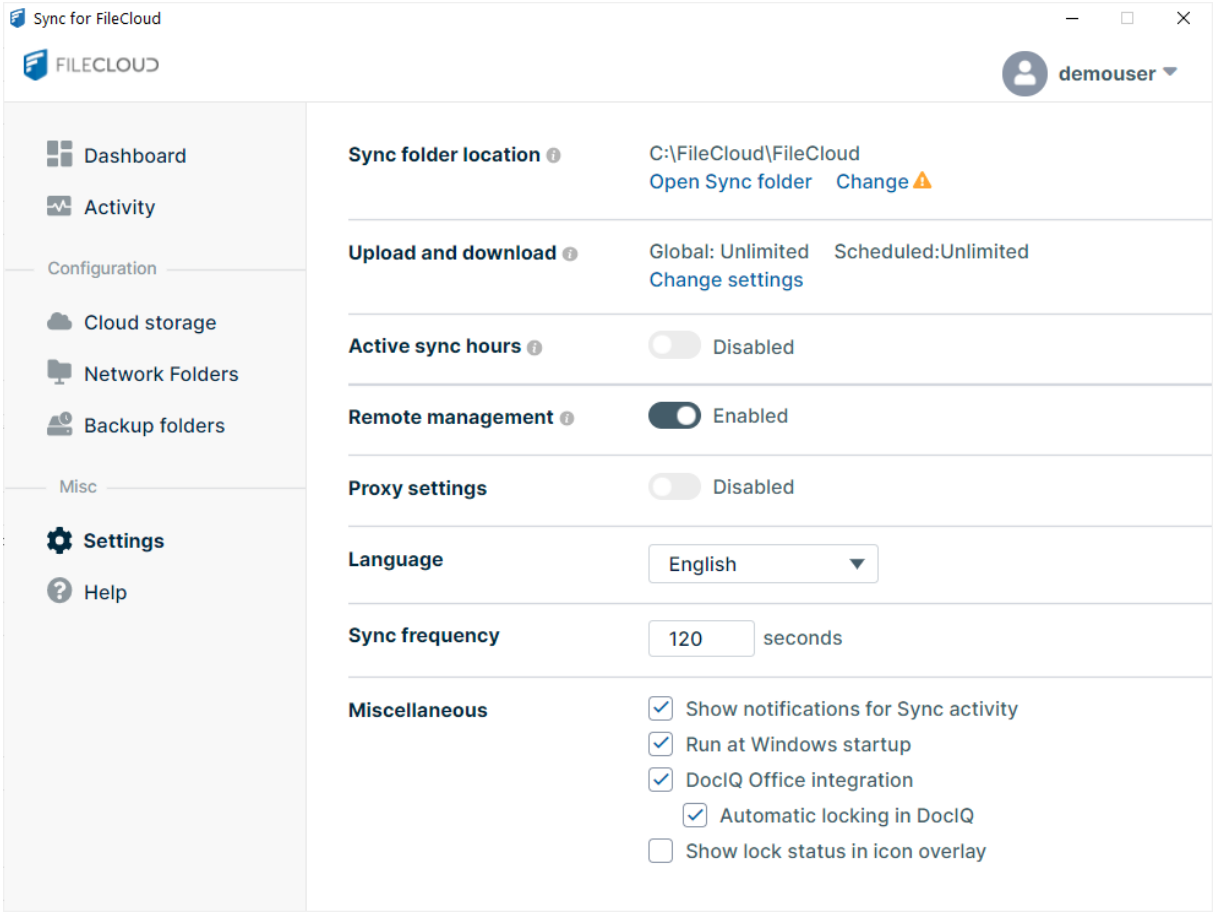
Backup folders screen

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



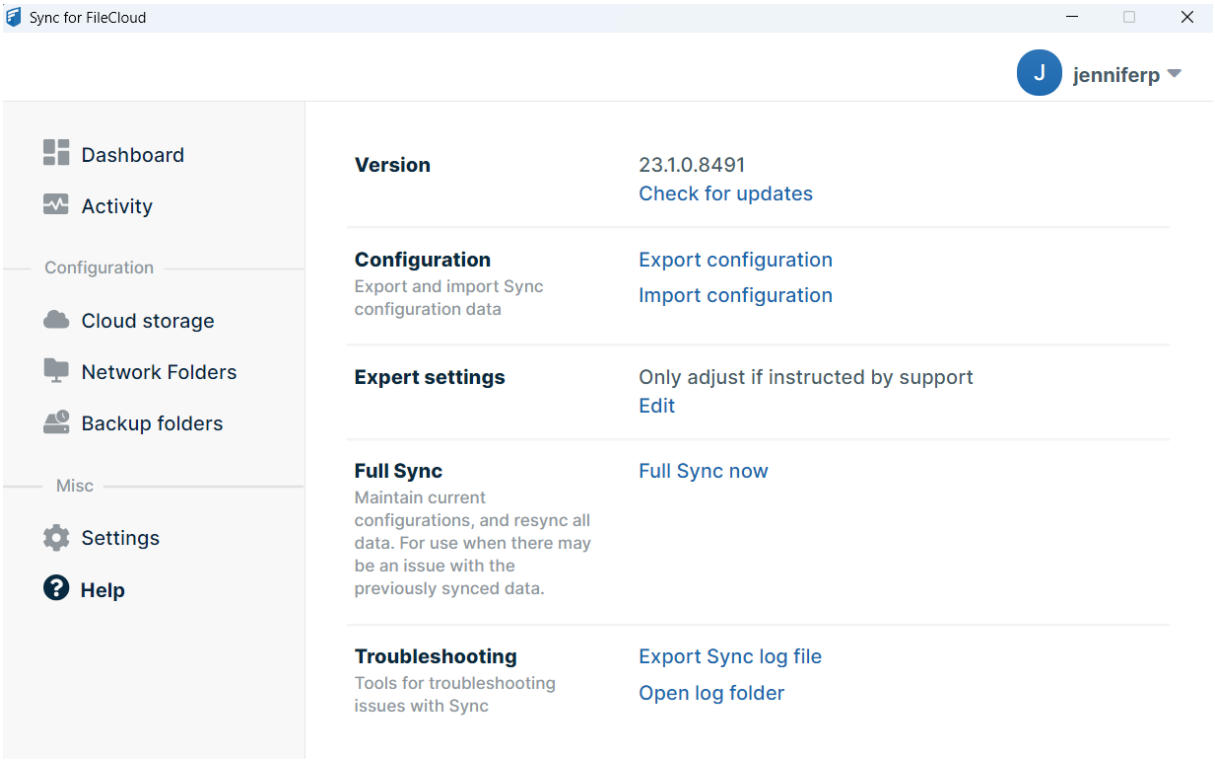
Settings screen

The **Settings** screen lets you view and change Sync settings.
For more information, see Sync Settings.



Help screen

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



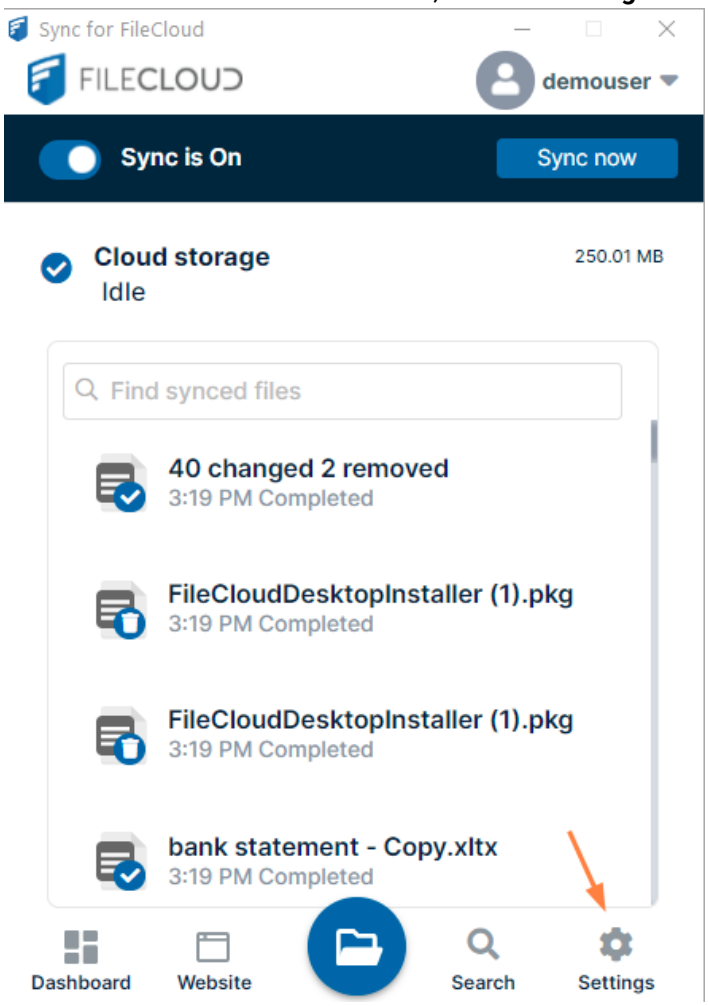
Sync Settings

You can view and control Sync settings from the Settings page of the main dashboard.

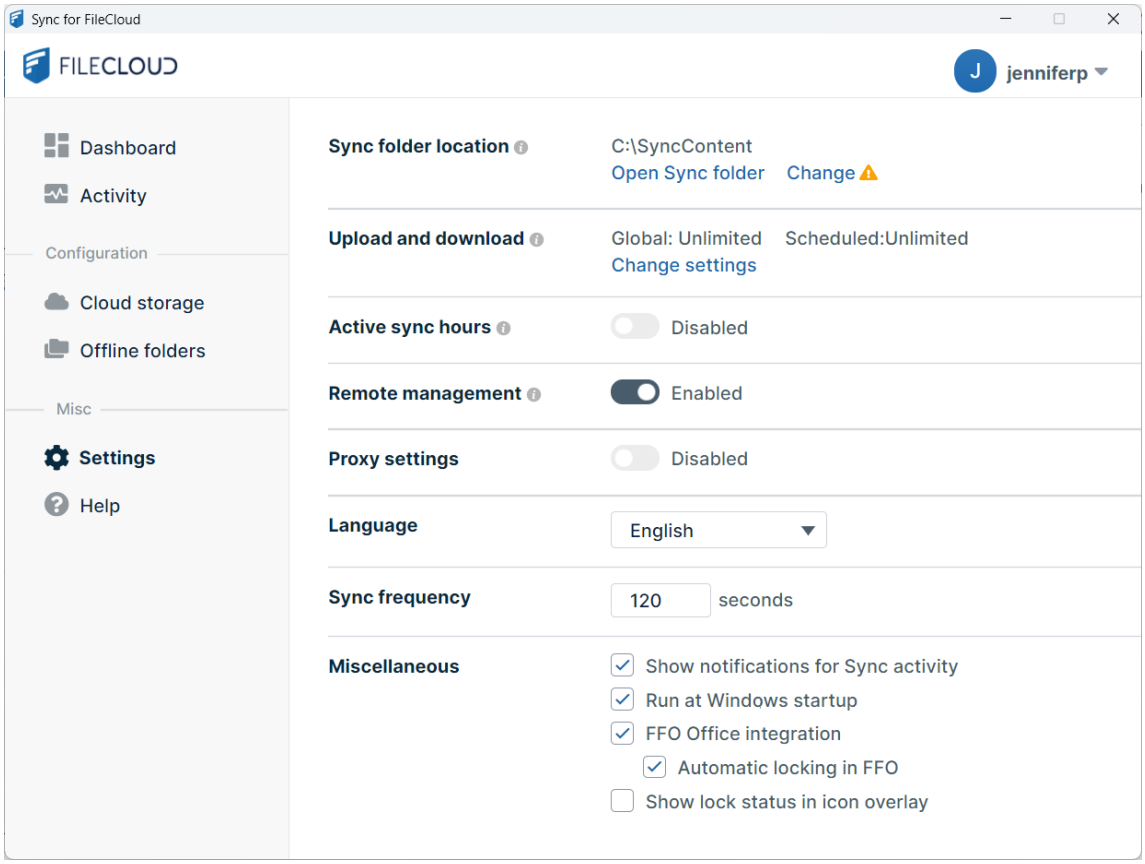
To get to the Settings page:

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

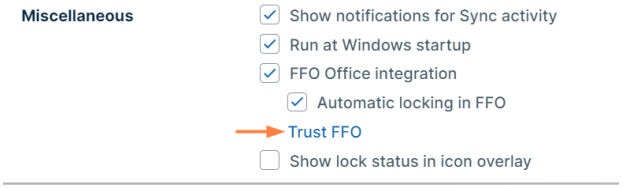
2. At the bottom of the mini-dashboard, click the **Settings** icon.



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



Setting	Function
Sync folder location	Click **Open Sync Folder** to open the Sync directories in your file explorer. Click **Change** to select a different location (a different drive or folder) for your Sync folder in file explorer.
Upload and download	See Limit upload and download rate.
Active sync hours	See Limit Sync To a Schedule.
Remote management	Allows Sync users to manage their Sync application by overriding an Administrator's settings, but from FileCloud version 19.1 and later, administrator's may disable the ability to override. See Managing Client Devices.
Proxy settings	Enabled or disabled by default depending on initial Sync configuration. You can enable, disable, and change proxy settings here. You must restart Sync for this to take effect.

Setting	Function
Language	Change the language of the inteface. You must restart Sync for this to take effect.
Sync frequency	You can change the built-in sync frequency of 120 seconds for cloud storage. You must restart Sync for this to take effect.
Miscellaneous	• **Show Notifications for Sync Activity** - **Yes** by default. Uncheck to change to **No**. You must restart Sync for this to take effect. • **Run at Windows Startup** - **No** by default. Check to change to **Yes.** • **FFO Office Integration** - checked (yes) by default. Uncheck to change the setting. You must restart Sync for this to take effect. For more information about FFO, see Using FileCloud for Office with Sync. • **Automatic Locking in FFO -** Checked (yes) by default. If automatic locking in FFO is checked, when you open a file in Sync, FFO automatically tries to lock it and give it read-only access. Check or uncheck to change the setting. You must restart Sync for this to take effect. If you are using DocIQ instead of FFO, the label appears as **Automatic Locking in DocIQ**. • **Trust FFO** - Only appears the first time you log in to FileCloud Sync. 1. Click **Trust FFO** to use FileCloud for Office. 2. If you are prompted to allow installation of the FileCloud for Office certificate, click **Yes**. The **Trust FFO** button disappears, and you will not have to click it again.  • **Show Lock Status in Icon Overlay** - **No** by default. When checked, if a user locks a file or folder in Sync, the lock icon overlay appears over it in the Sync directory in file explorer.

Limit Sync To a Schedule

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

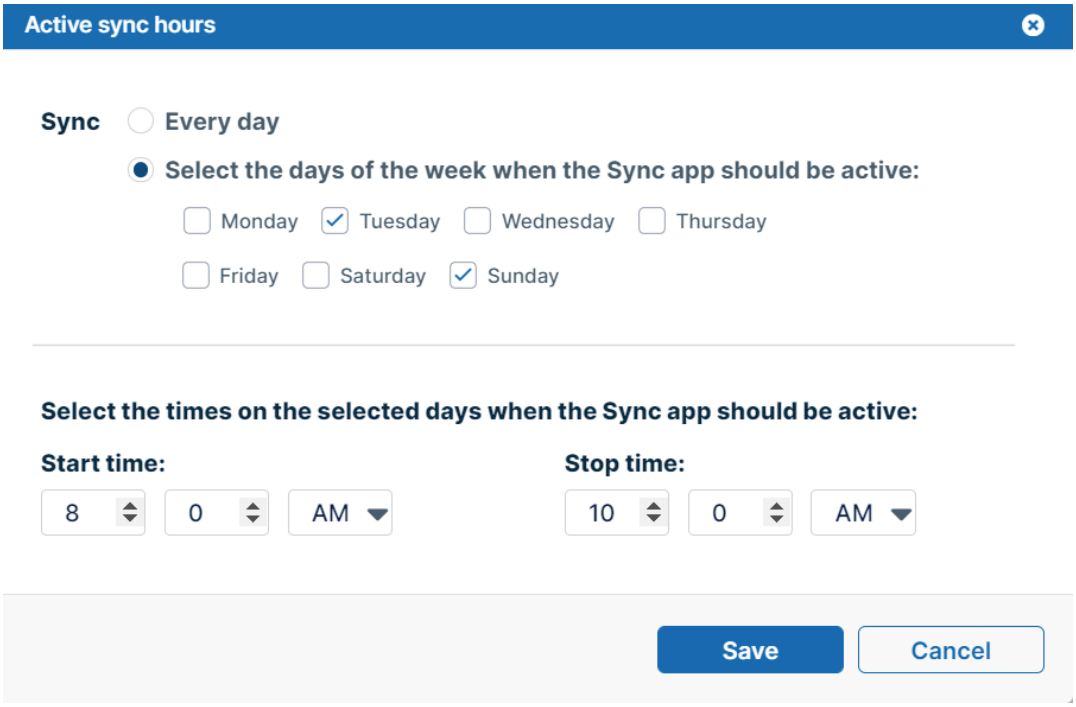
Scheduling Sync is useful if:

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

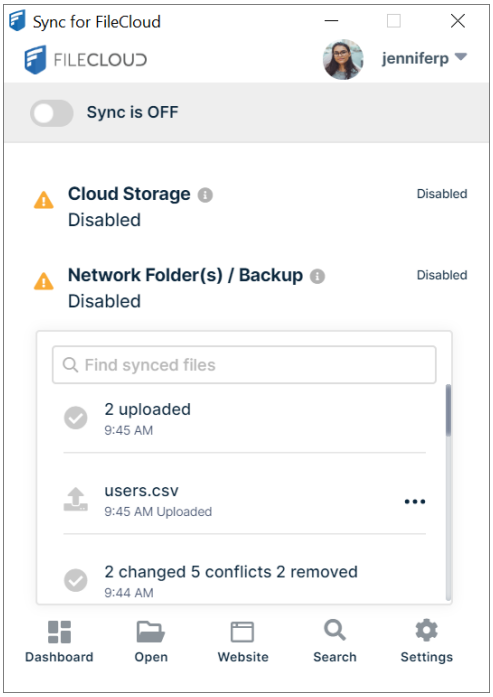
If you enter settings, the only time syncing occurs is the time specified in the settings.
For example:
If you choose:

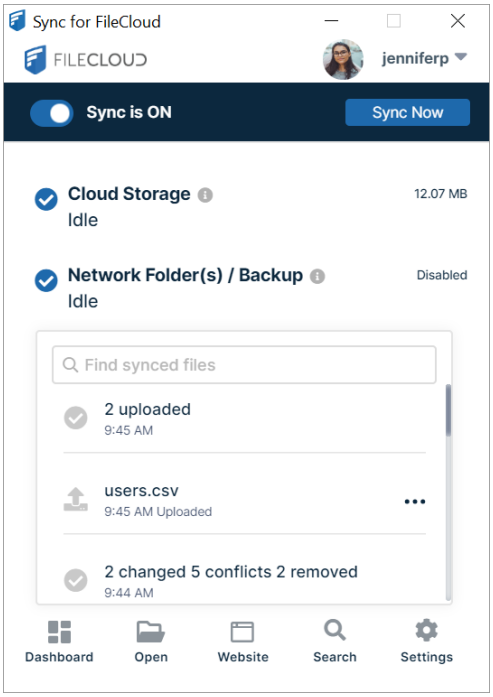
- Sunday and Tuesday for days of the week
- the hours from 8:00 AM To 10:00 AM

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



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

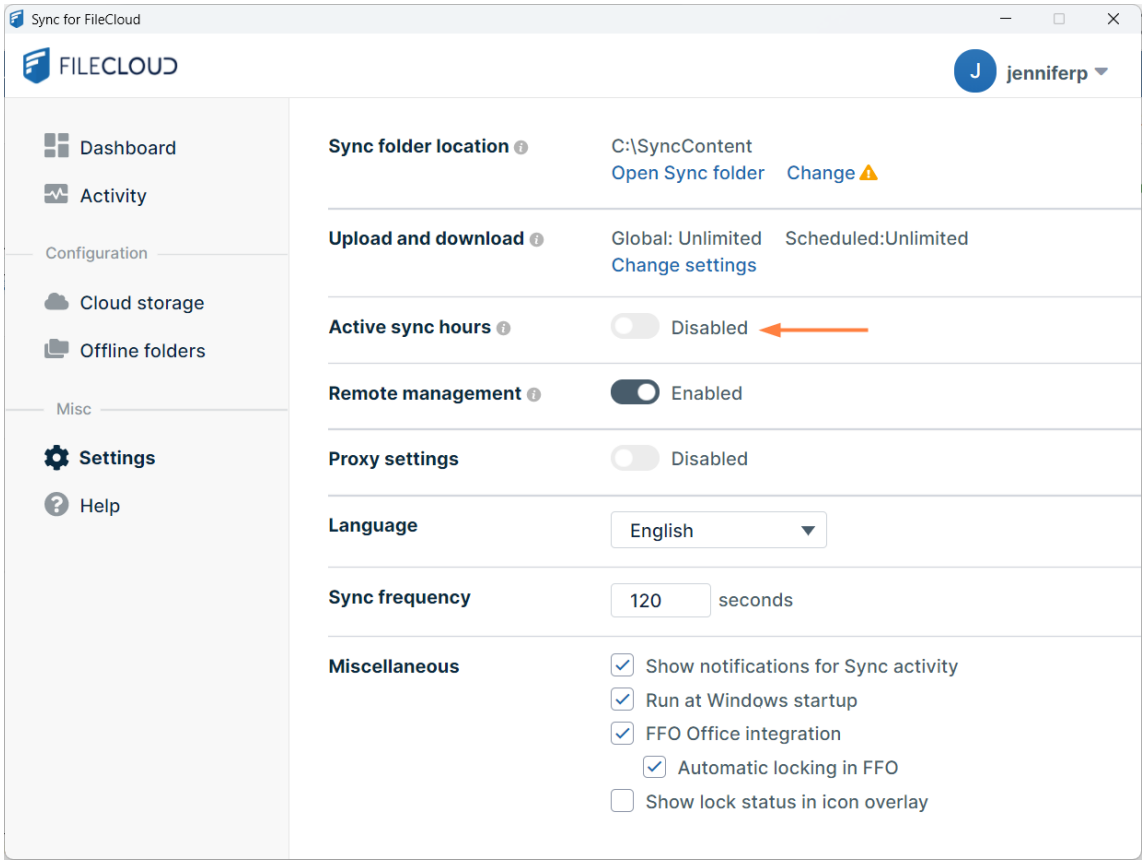
Setting	Value	Impact	Notes
Active Sync Hours	enabled	Sync is active only during the scheduled times. • At all other times Sync remains disabled, which means real-time syncing, offline folders syncing, and backup are disabled. • **Sync is off** appears on the mini dashboard and main dashboard.  ⚠ If you choose the Doc editing only mode, then you cannot set Active Sync Hours	

Setting	Value	Impact	Notes
Active Sync Hours	disabled	Sync is always active. • **Sync is on** appears on the mini dashboard and main dashboard. • The **Sync Now** button appears on the mini dashboard and the main dashboard. 	If the **Active Sync Hours** settings are disabled because you are in Document Editing mode, you can enable them by clicking **Sync is Off** in the main dashboard or mini-dashboard. The dashboard setting now appears as **Sync is On** and **Active Sync Hours** settings are enabled.
Doc editing only	enabled	This mode always takes precedence over **Active Sync Hours** If you are in Document editing only mode, the **Active Sync Hours** settings are disabled.	To use **Active Sync Hours** settings again: • Click **Sync is Off** in the main dashboard or mini-dashboard. It now appears as **Sync is On** and **Active Sync Hours** settings are enabled.
Doc editing only	disabled	**Active Sync Hours** settings are enabled and a schedule can be set.	

To set a schedule for Sync times:

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

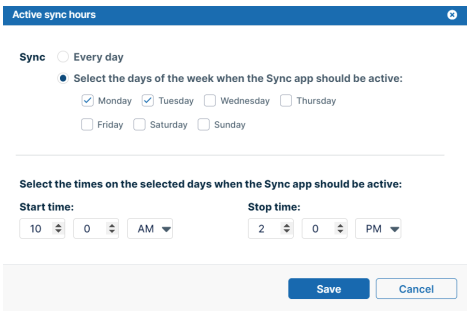
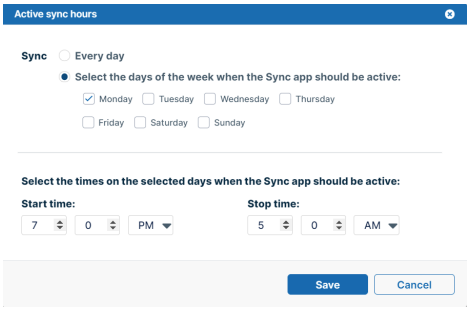
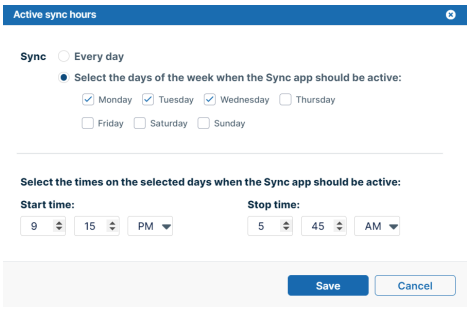
2. In the mini-dashboard, click **Settings**.
   The **Settings** window in the main dashboard opens.
3. In the **Settings** window, in the **Active Sync Hours** section, click the toggle to change it to **Enabled**.

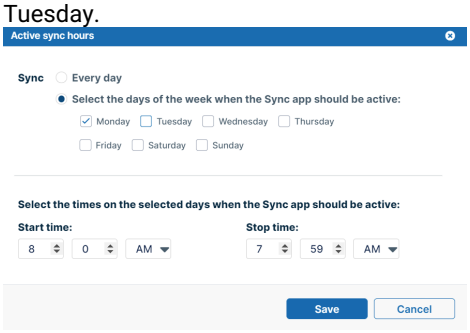
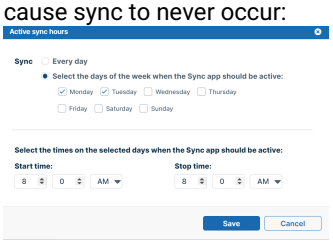


   The **Active Sync Hours** dialog box opens.

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

Special cases for Active Sync Hours

Case	How to configure	Notes:
Active times start and stop at the same times multiple days, that is: **Mon10:00 am - Mon 2:00 pm** **and** **Tues 10:00 am - Tues 2:00 pm**		The Sync app does not treat this as Monday 10:00 am to Tuesday at 2:00 pm.
If **Stop time** is later than **Start time**, do not check the next day; it is assumed that the time continues into the next day. If you check the next day, the app includes the next day and its following day as well (see the example in the next row).		The Sync app treats this as Monday 7:00 pm to Tuesday 5:00 am. (If you check Monday and Tuesday, The Sync app would treat it as Monday 7:00 pm - Tuesday 5:00 am and Tuesday 7:00 pm to Wednesday 5:00 am)
Active times are overnight on consecutive days, that is: **Mon 9:15 pm - Tue 5:45 am** **and** **Tue 9:15 pm - Wed 5:45 am** **and** **Wed 9:15 pm - Thu 5:45 am**		The Sync app does not treat this as Monday 9:15 pm through Thursday 5:45 am.

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

Limit upload and download rate

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

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

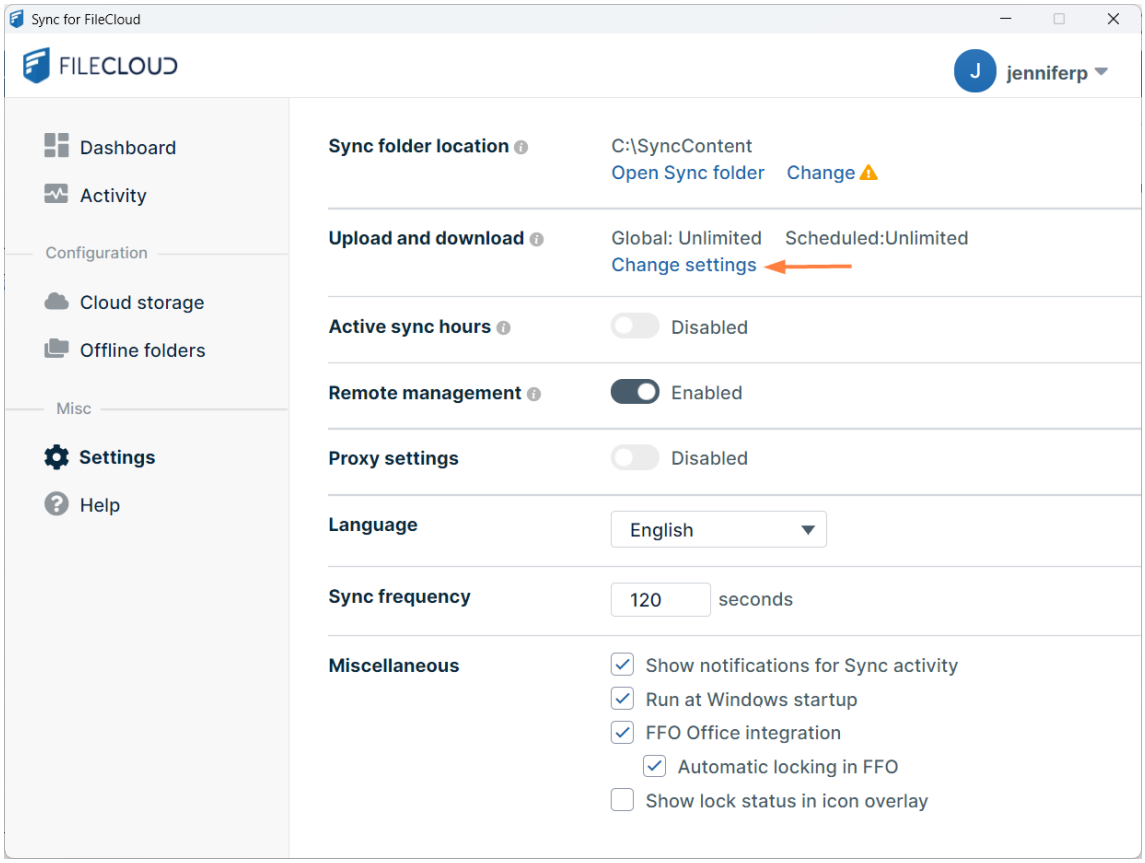
-
  - You can limit Sync's upload and download rate to reduce the impact on your network and day to day operations.
    - Rates are specified in kilobytes (KB/s).
    - You can set a limit to be used whenever you are running Sync.
    - You can set a limit that is enforced only during a specific interval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

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

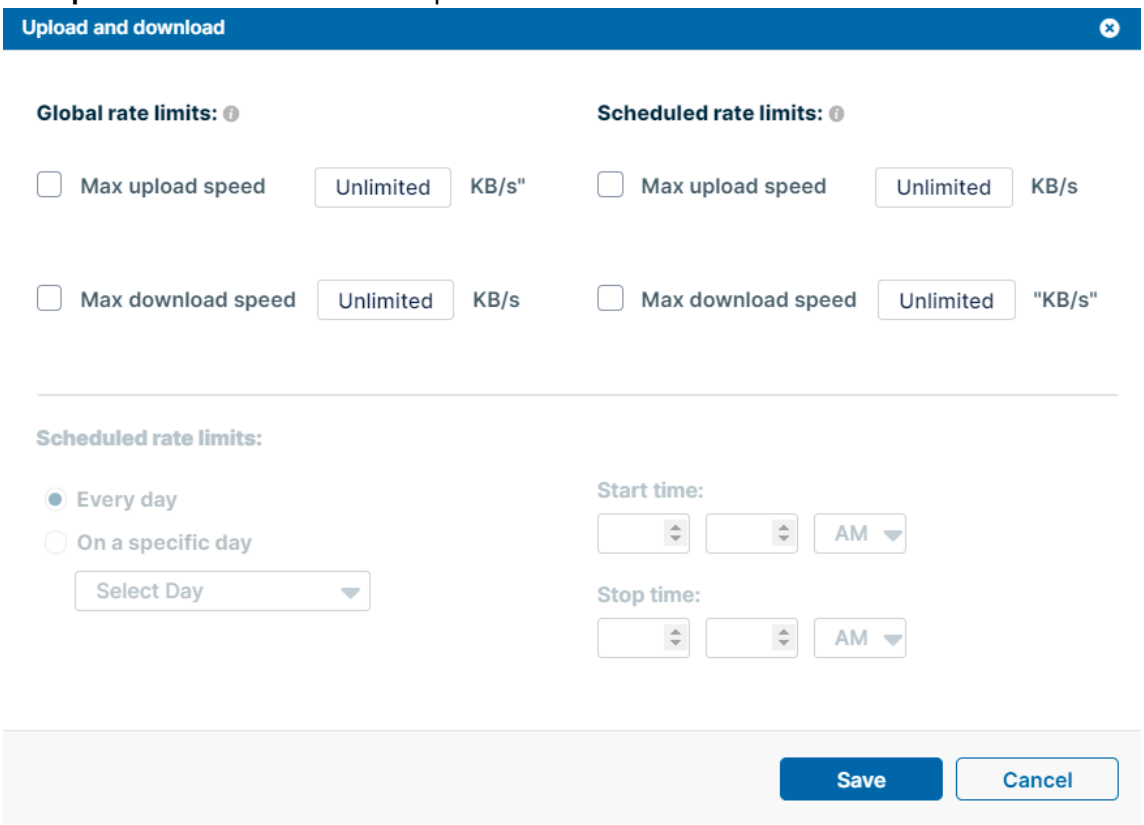
💡 If you do not specify a rate limit or if it is set to -1, then Sync will use all of the available KB/s.

To set a rate limit for Sync:

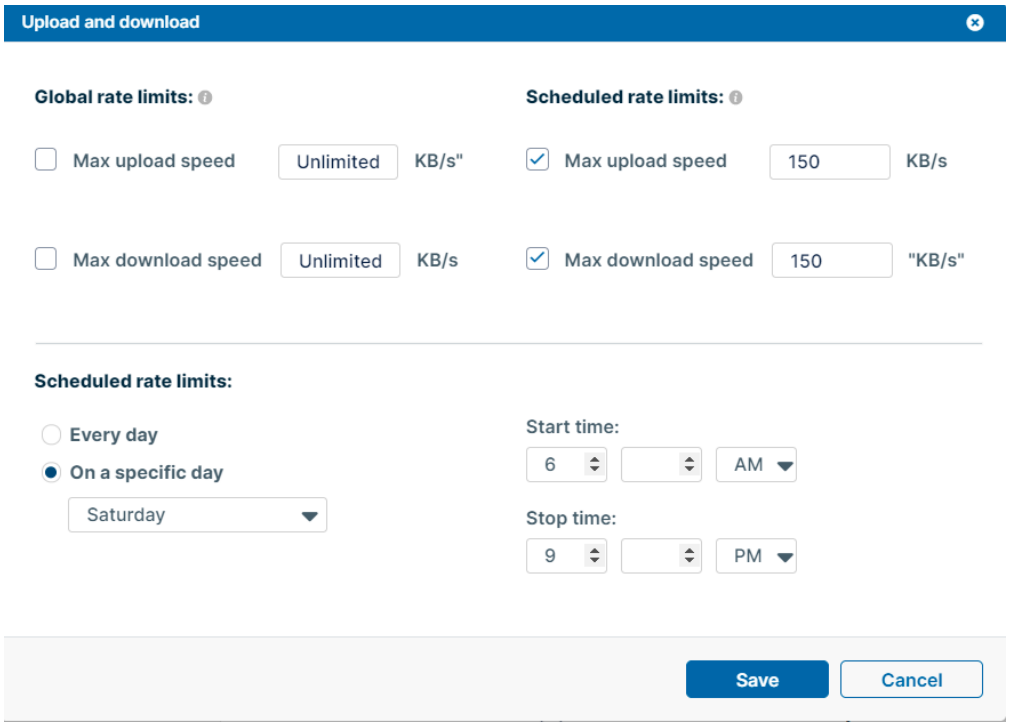
1. In your system tray, right-click on the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Settings**.
   The **Settings** window in the main dashboard opens.
3. In the **Settings** window, in the **Upload and Download** section, click **Change Settings**.



The **Upload and Download** window opens.



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



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

Synchronizing Files

Automatic Syncing

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

Automatic Sync schedules

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

- Change the default Sync schedule

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

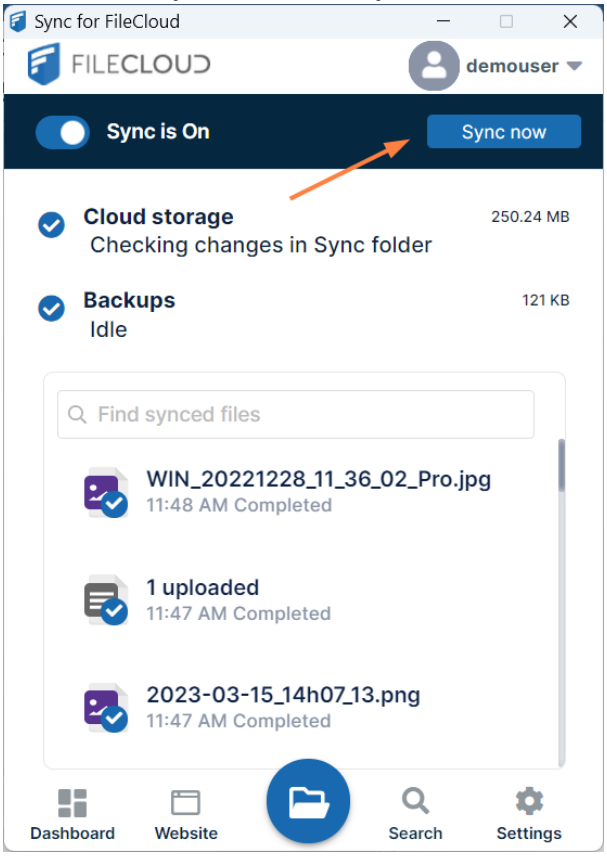
Manual Syncing

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

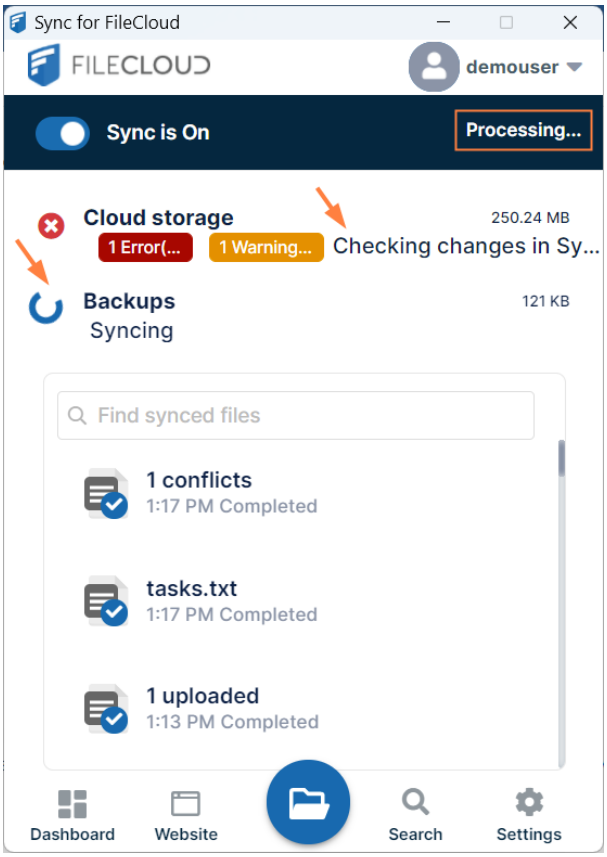
Manually sync from the mini-dashboard

To manually sync from the mini-dashboard:

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

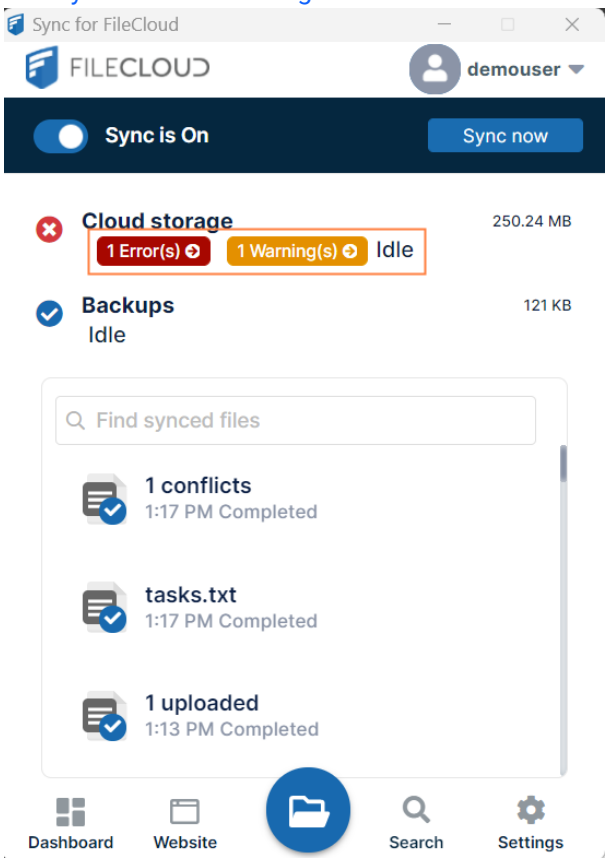


The mini-dashboard indicates if cloud storage or backups are being processed, lists the files being processed, and indicates any errors or conflicts.



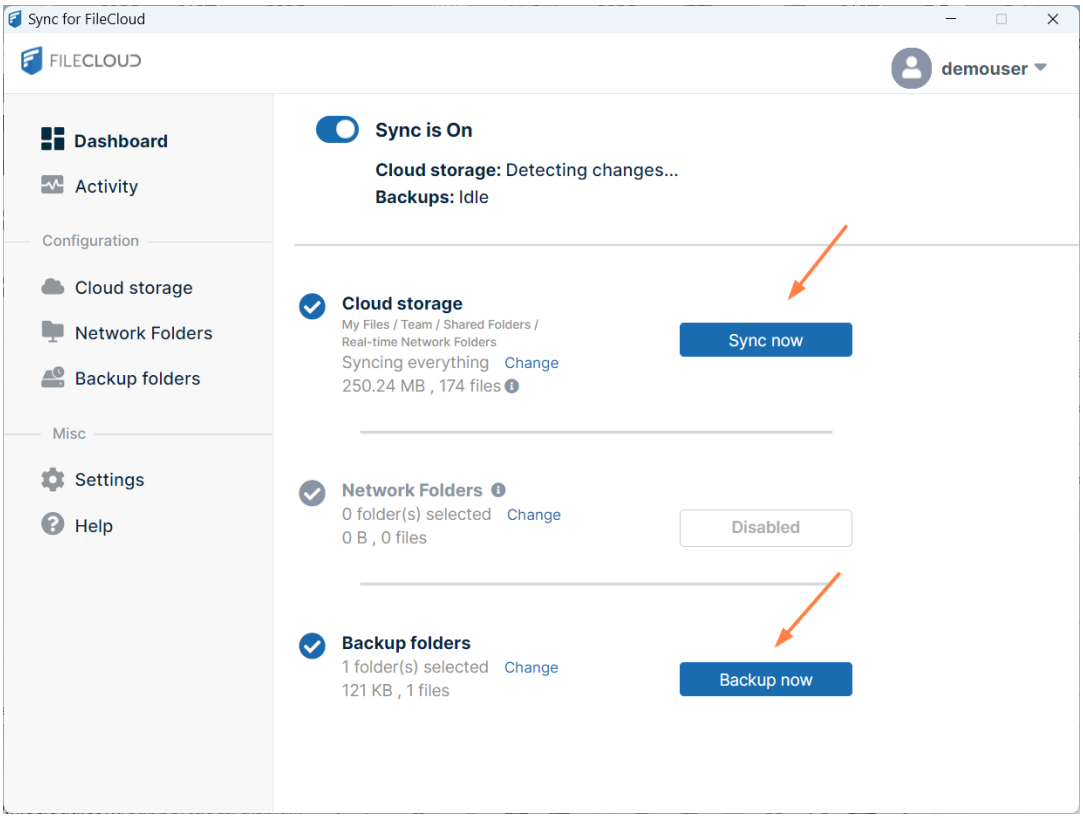
When processing is complete, **Cloud storage** and **Backups** displays **Idle** next to them as well as the number of files with errors. To handle error files after syncing see Managing Sync Conflicts

and Sync Troubleshooting Guide.

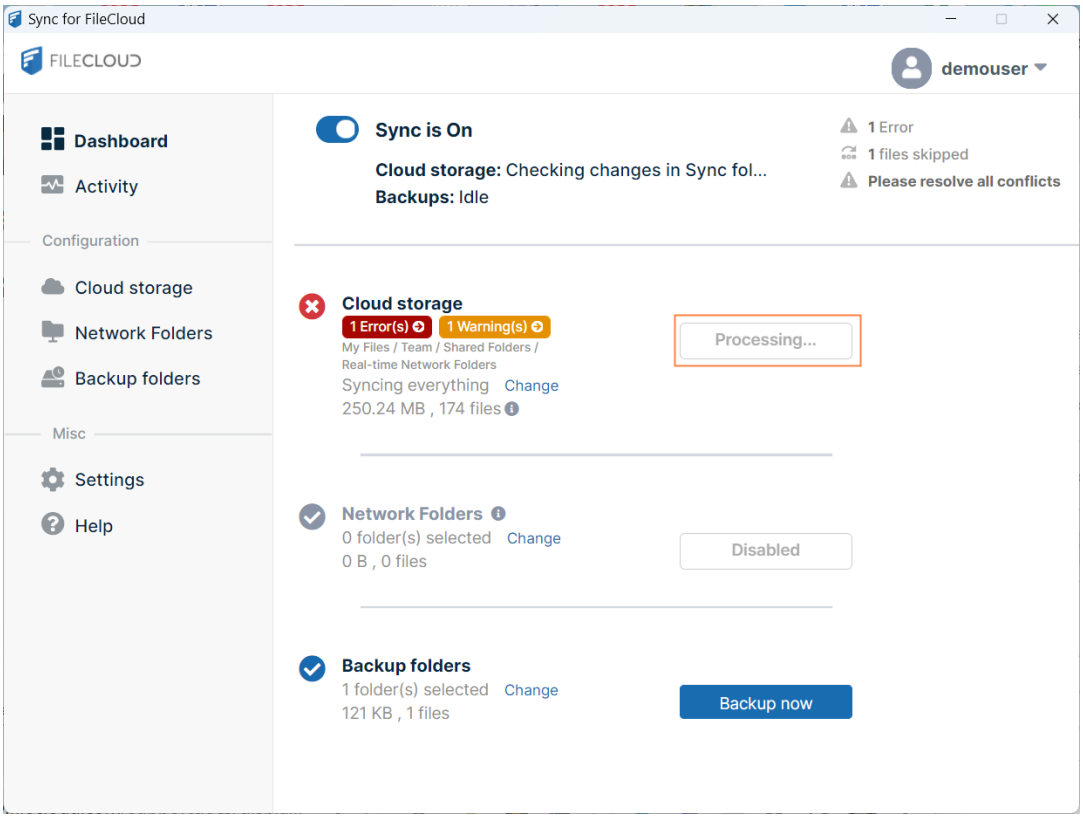


To manually sync from the main dashboard:

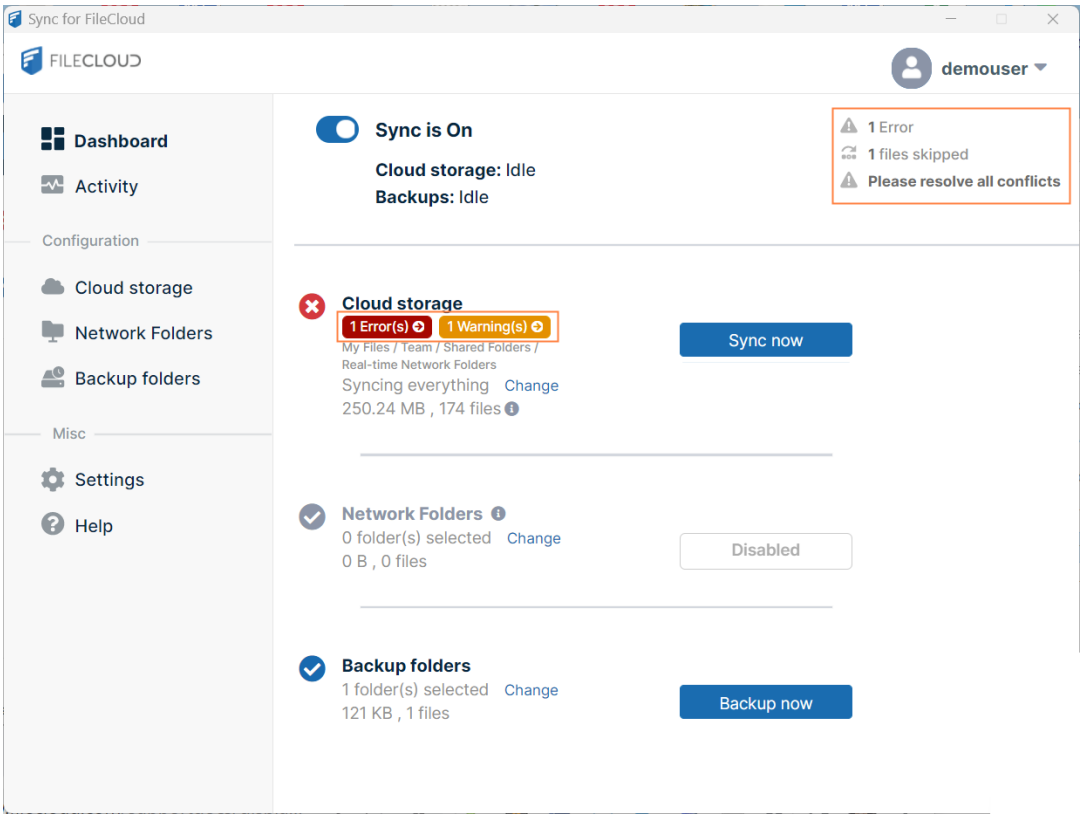
1. In your system tray, right-click on the Sync icon and choose **Open**.
   The mini-dashboard opens.
   a. Click the **Dashboard** icon.
      The main dashboard opens to the **Dashboard** screen.
      Cloud Storage is listed with a **Sync Now** button next to it if syncing is enabled and files are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



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



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



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

After syncing:

Managing Sync Conflicts

What is a Sync conflict?

Conflict can arise under the following conditions:

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

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

- Instead, Sync will save the original file

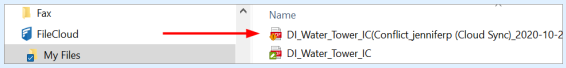
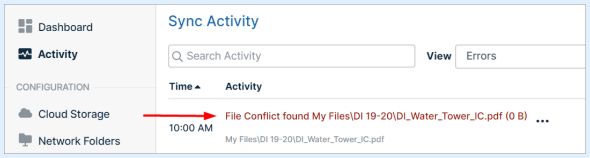
- Sync also saves a second version which has the same name but is appended with the information about the conflict

Conflict files are named as follows, where **filename** is the name of the file with the conflict, and the date is the date and time of the conflict:

- For a file in a shared folder, where **other** is the name of the other user who modified the file: **filename**(Conflict_**other** (Web browser)_2020-03-25-22-50-36).txt
- For a file in a team folder, where **teamname** is the team folder account name: **filename**(Conflict_**teamname** (Web browser)_2020-03-25-23-01-42).txt
- For a read-only file in a local sync folder,: **filename**(Conflict_Read-Only_2020-04-27-21-35-33).doc

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

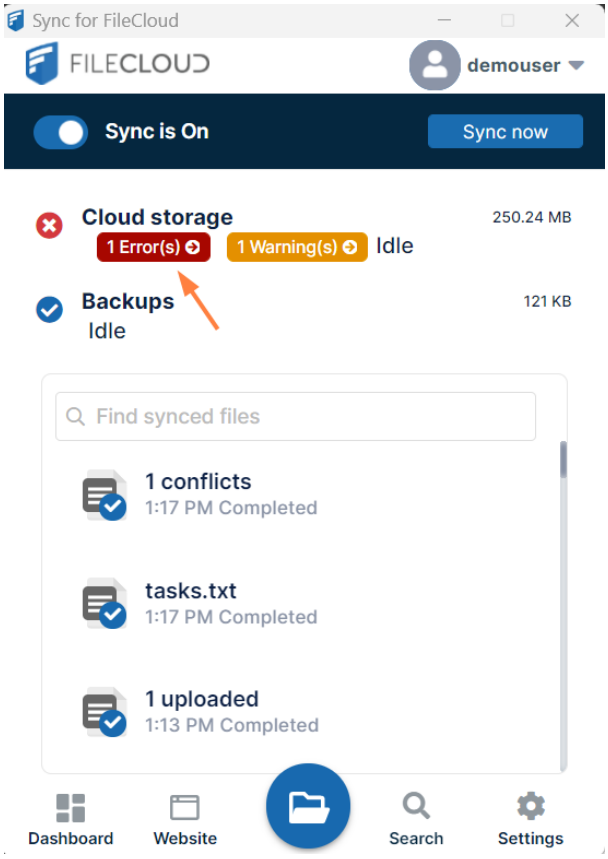
Your Sync conflicts appear in two places, and you can resolve them in either.

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

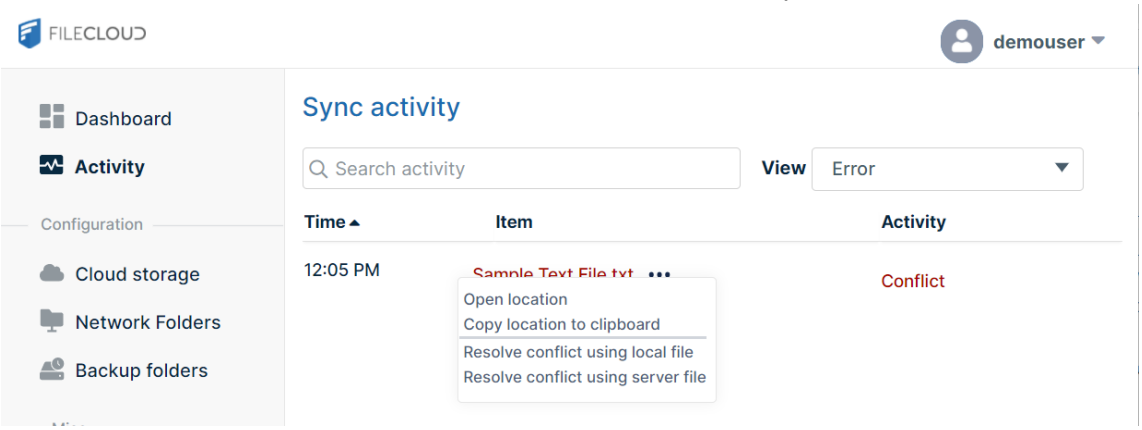
To resolve an individual conflict from the Sync dashboard:

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

error notification.



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

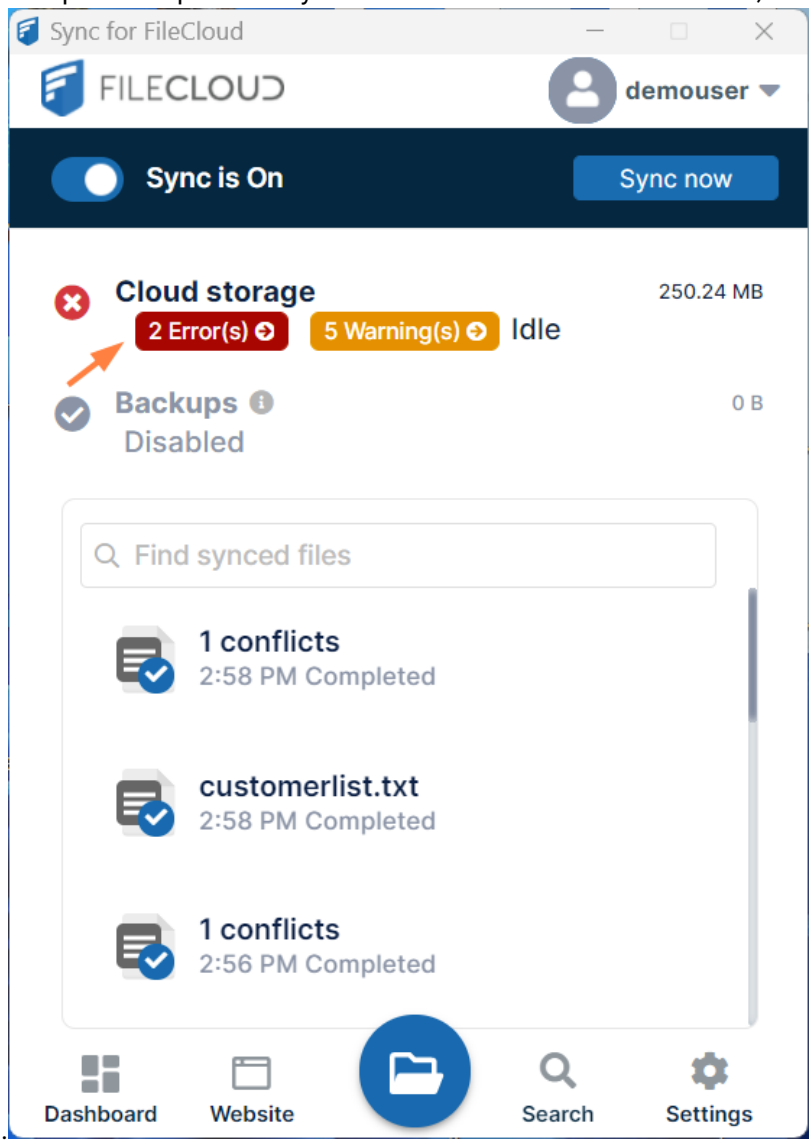


4. Click **Resolve conflict using local file** to discard the server file and keep your modified local file.
   or
   Click **Resolve conflict using server file** to discard the local file and save the file that is currently on the server.
5. If you want to go to your Sync folder in file explorer and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

6. If you want to copy and paste the location in a message or file, click **Copy Location to Clipboard**.

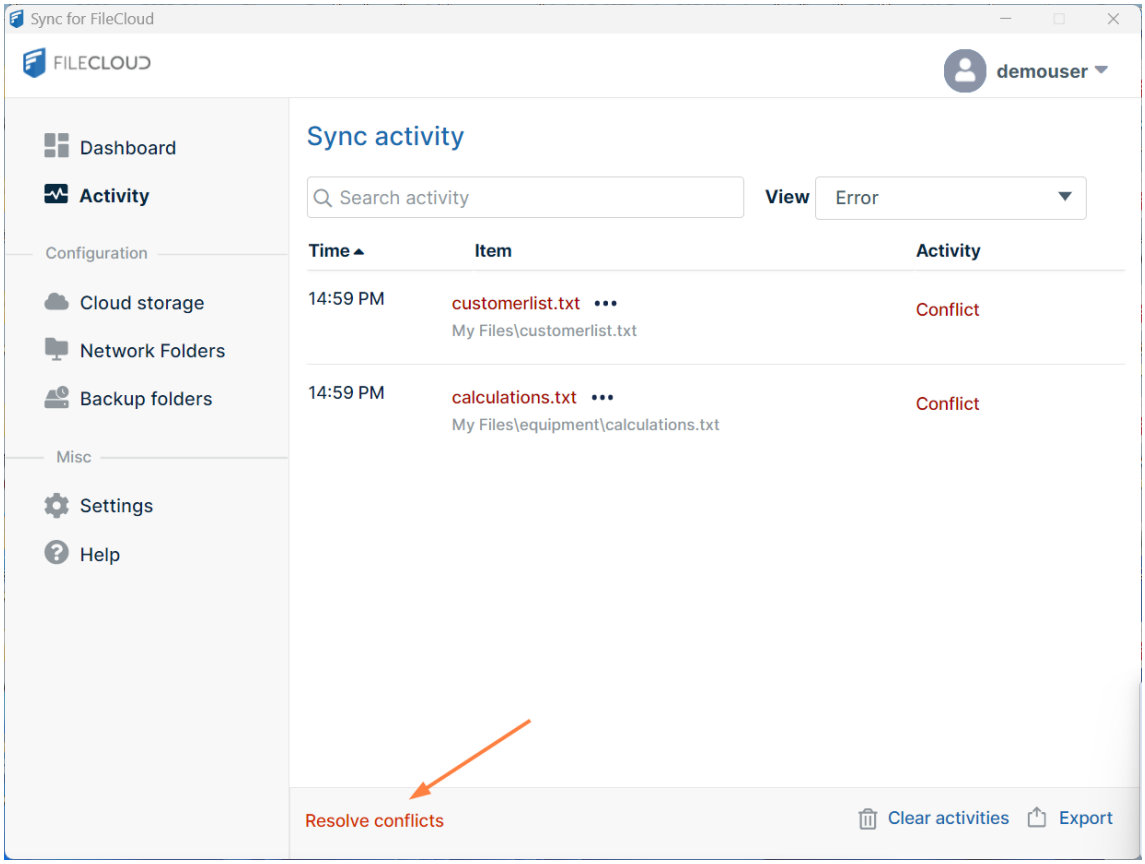
To resolve multiple conflicts from the Sync dashboard:

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



2. Click the error notification.
   The dashboard opens to the **Activity** window with **Error** selected in the **View** drop-down list. Conflicts and other errors are listed below it.

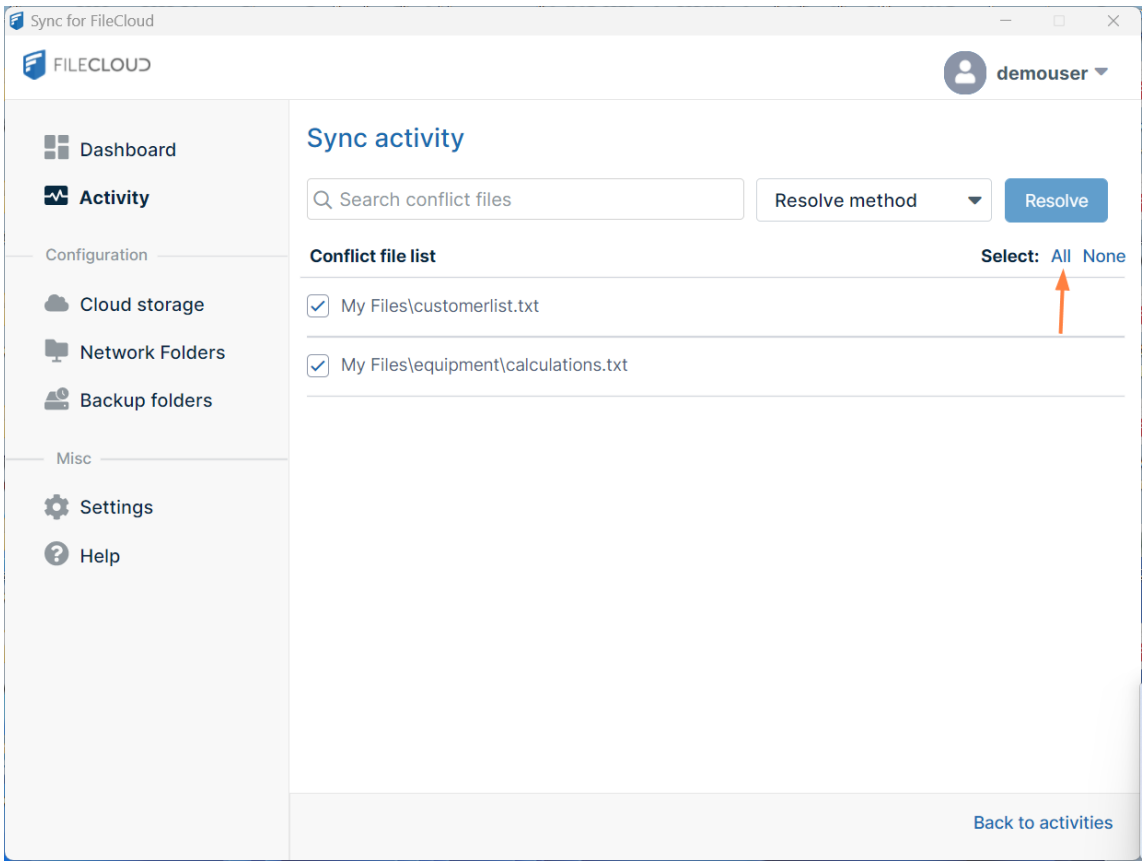
3. At the bottom of the window, click the **Resolve Conflicts** link.



The window now displays the file conflicts with checkboxes beside them and a **Resolve method** drop-down list.

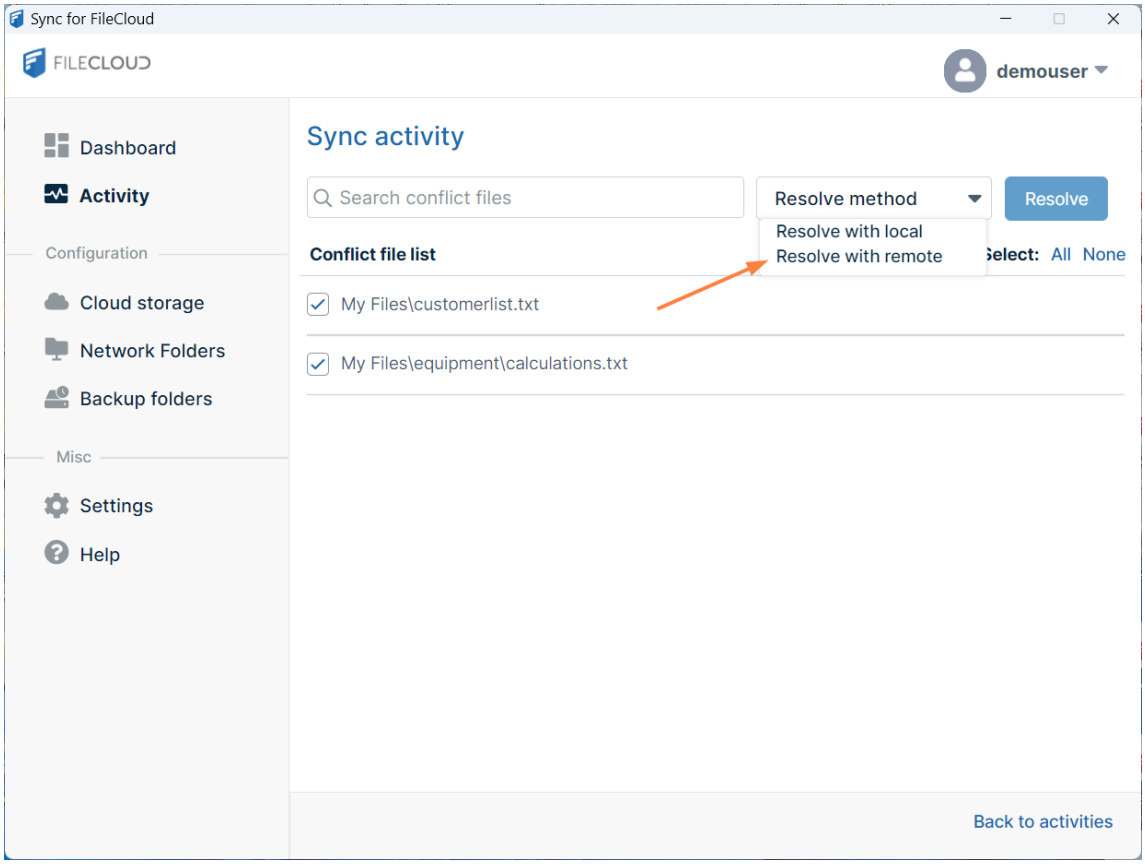
4. Click **All** to check all of the files, or individually check files

.



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

server for each checked conflict.

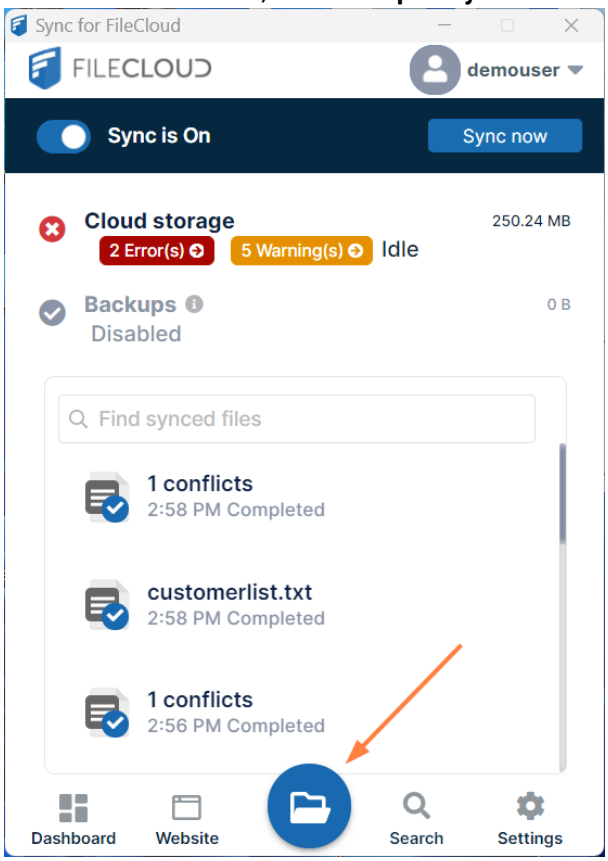


6. Click **Resolve**.
7. In the confirmation box, click **Yes**.

Resolve a conflict from the Sync directory in file explorer:

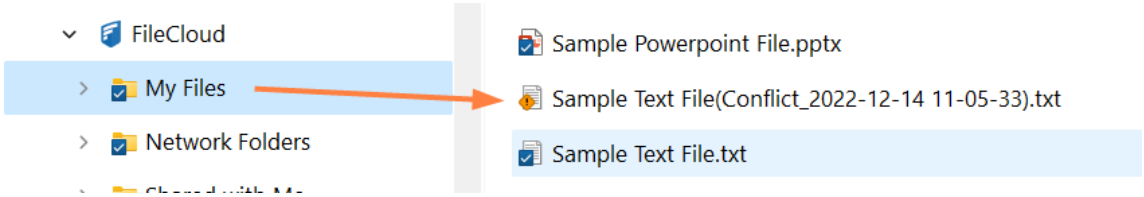
1. In your system tray, right-click on the Sync icon and choose **Open**.

2. In the mini-dashboard, click the **Open Sync Folder** icon.

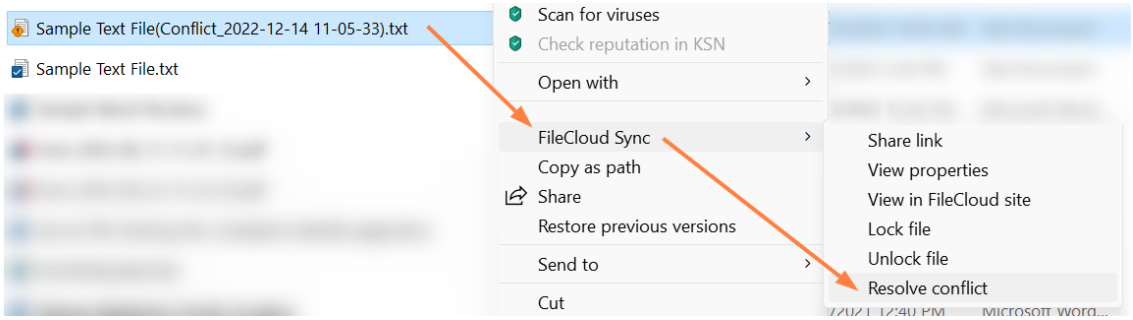


File explorer opens and displays your Sync directory.

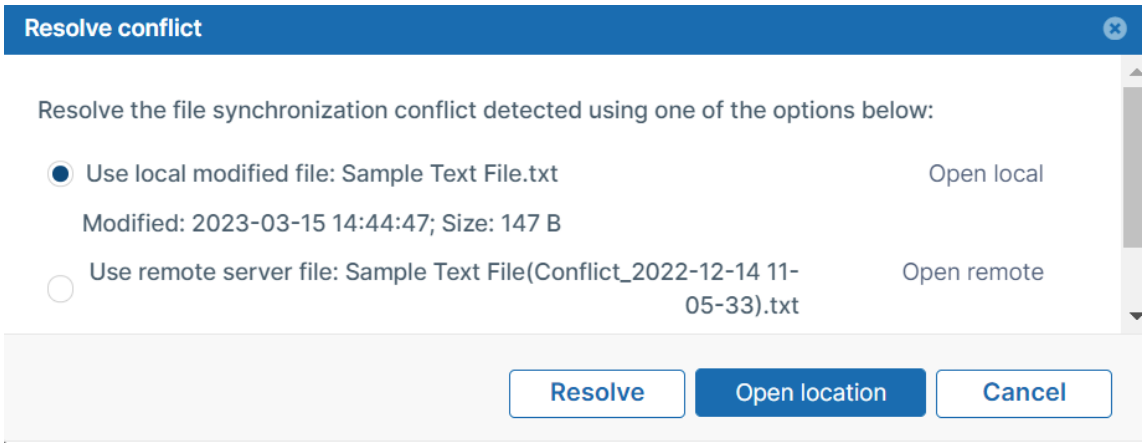
3. Open the folder in your Sync directory that contains the conflict file or folder.
A conflict file has a yellow warning icon over it and a name in conflict format in parentheses. It appears above or below the local version of the file.



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



A **Resolve Conflict** dialog box opens.



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

Reviewing Skipped Files

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

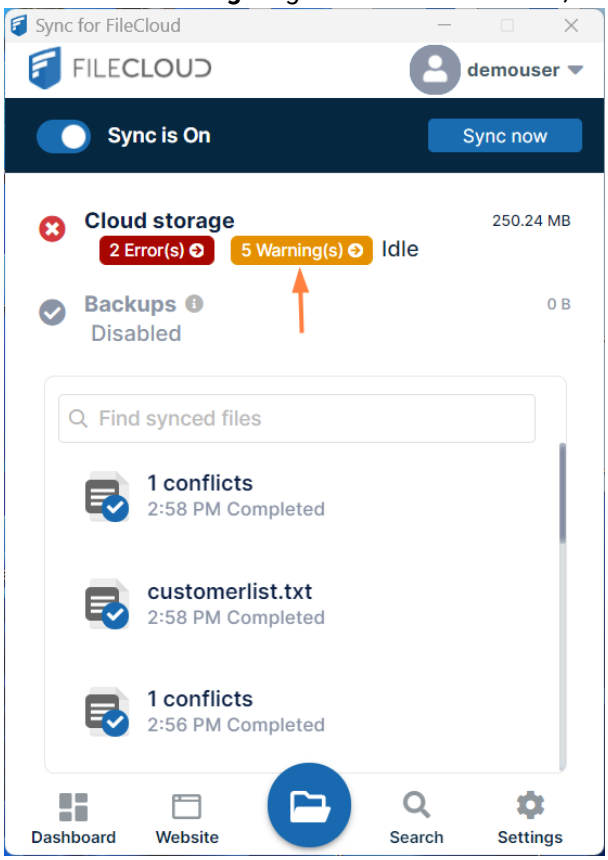
- Files of this type are not uploaded from your local computer to the server.

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

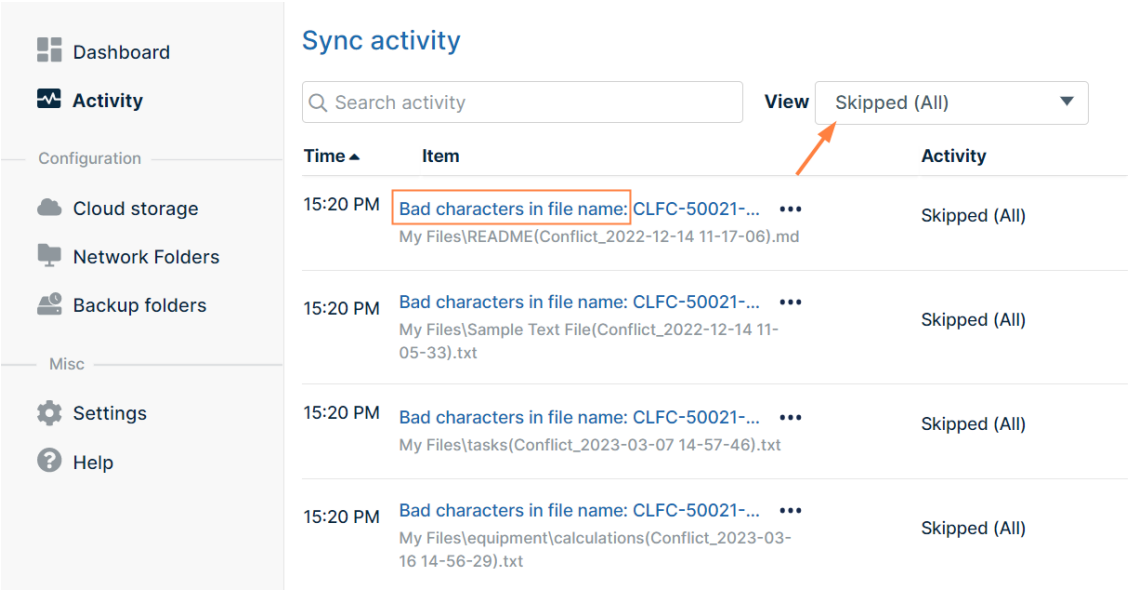
Description	Notes
Files in use	These are files that have an exclusive write lock or are read-only
File names matching the skip regex string	This is configured in a file, usually by your administrator
File names with special characters	~, <, >, :, \, /, *, ?, \r, \n And also .cache and .tmp.part files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

To view a list of skipped files:

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

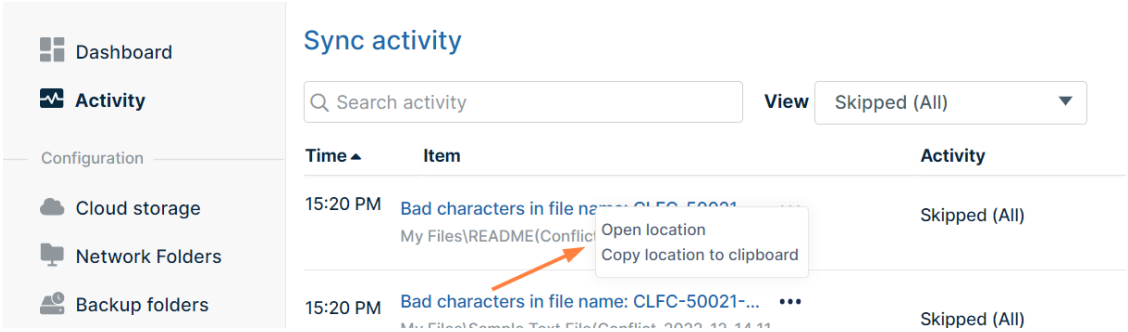


The **Activity** screen opens with **Skipped (All)** appearing in the **View** drop-down list.



The description for each file indicates why it was skipped.

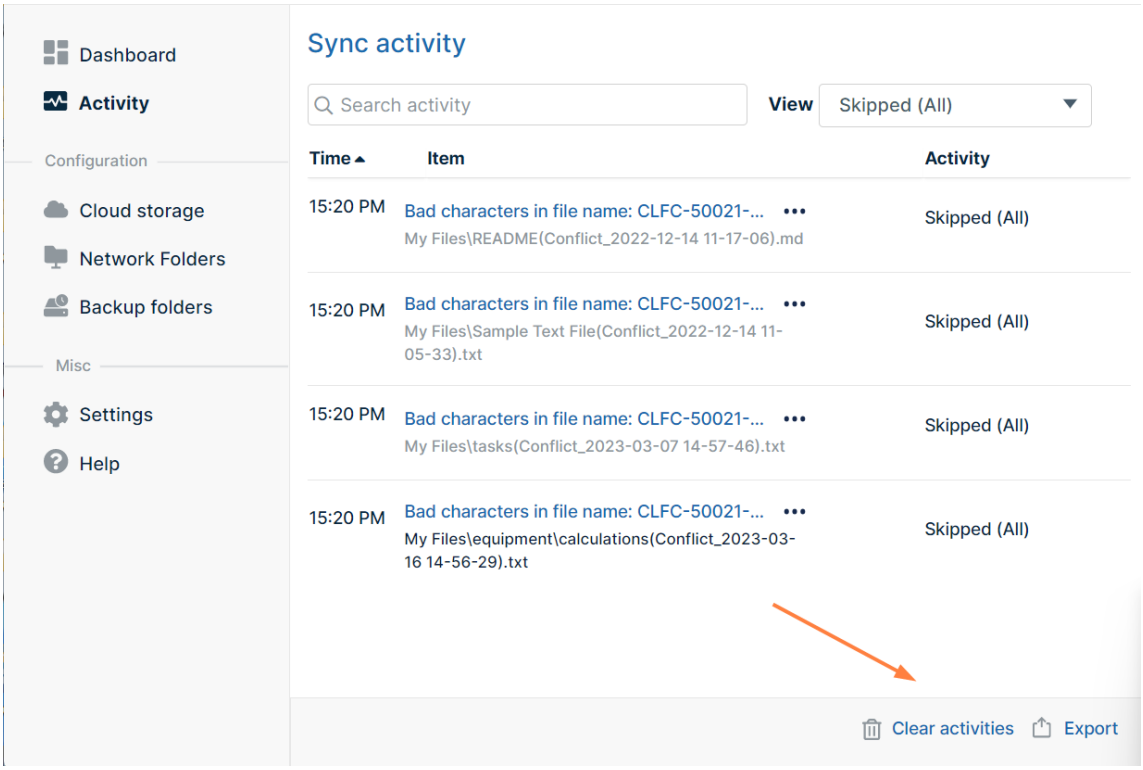
3. Click the three dots next to the description for options.



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

To export or clear the skipped files:

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

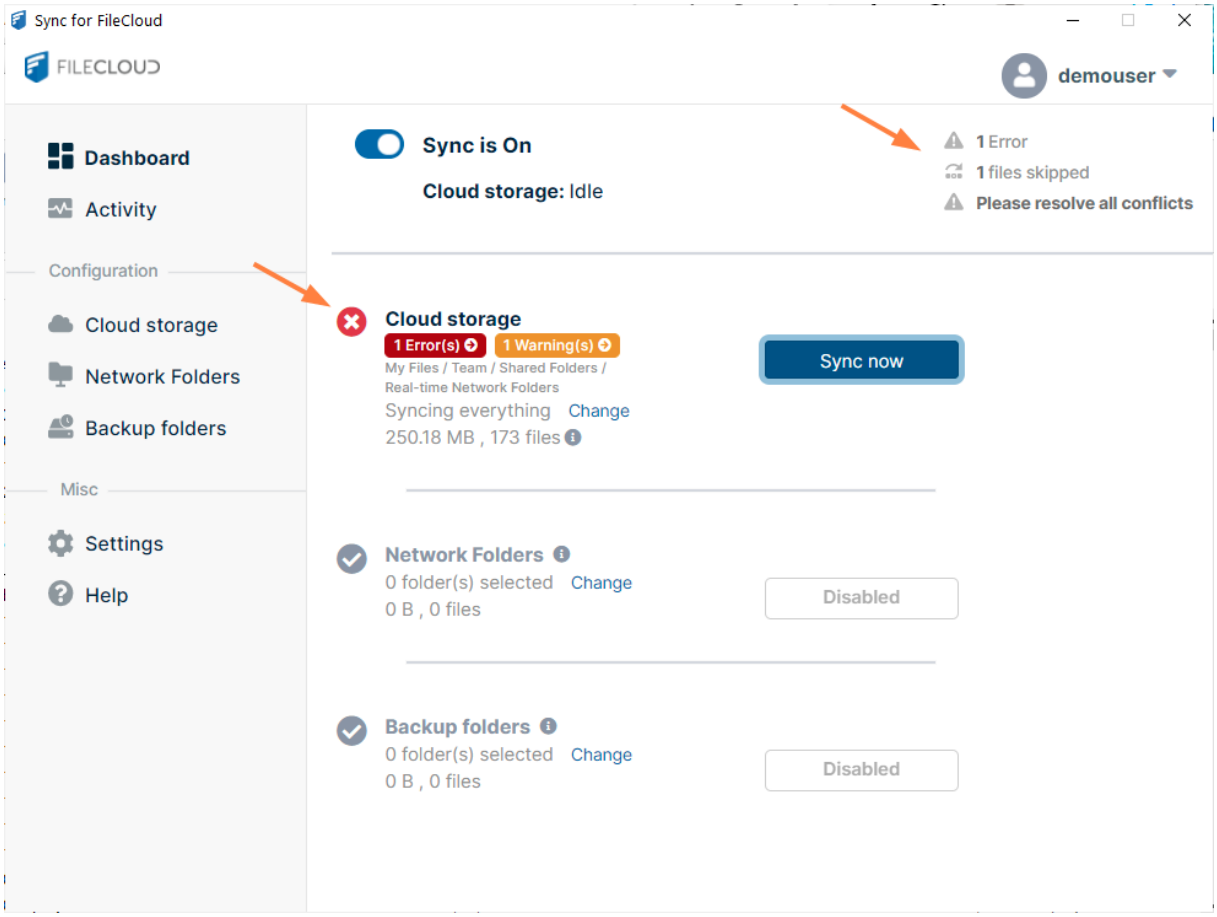


Checking Sync Status

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

Status in the main dashboard

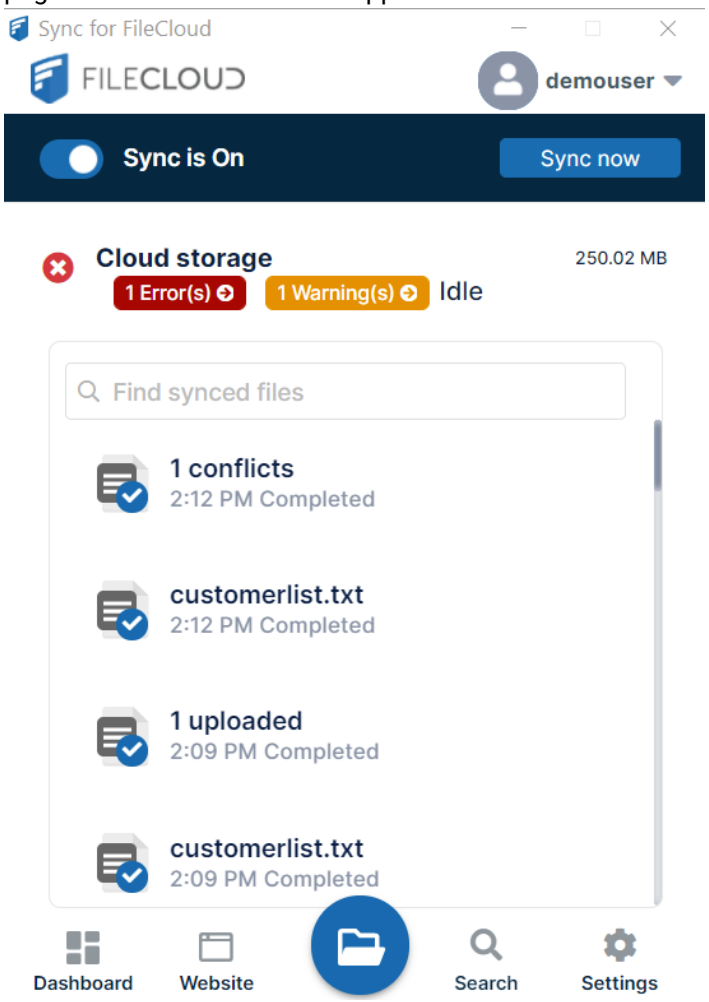
After a sync operation runs, if there are any errors or skipped files, the main dashboard displays a count in the upper-right corner. It also displays a a red error sign, a yellow warning sign, or a check (to indicate a successful run) beside **Cloud storage**.



Status flags in the mini-dashboard

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

page to see the conflicts or skipped files.



Status flags in the system tray

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



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

Icon	Color	Status

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

Click the Sync icon to open the mini-dashboard.

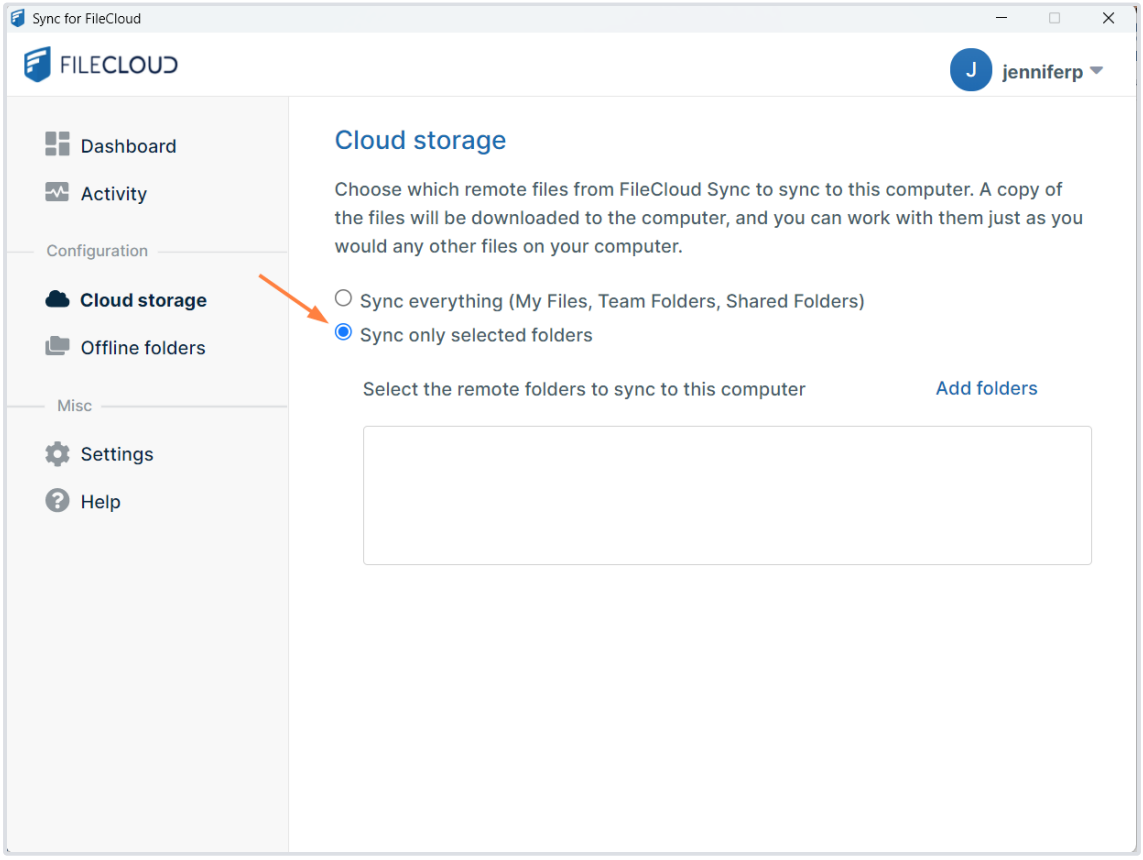
Cloud Storage: Selective Folder Sync

Limiting what gets Synced

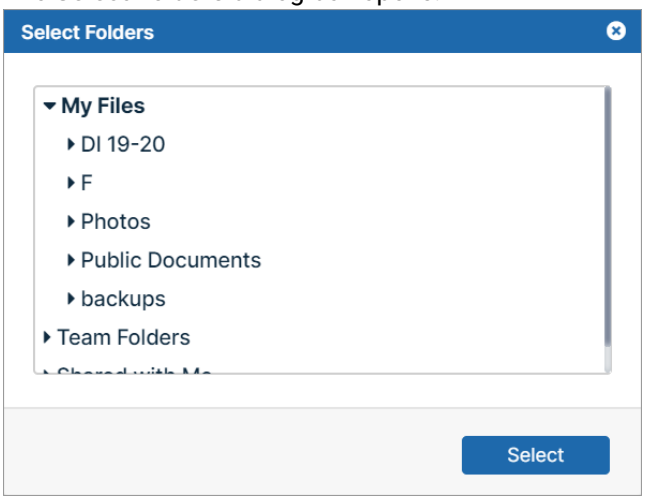
You can choose to limit which folders in cloud storage get synced. This is useful when you have terabytes of data in an account and you only want a few gigabytes of folders locally to conserve space.

To limit which folders are synced:

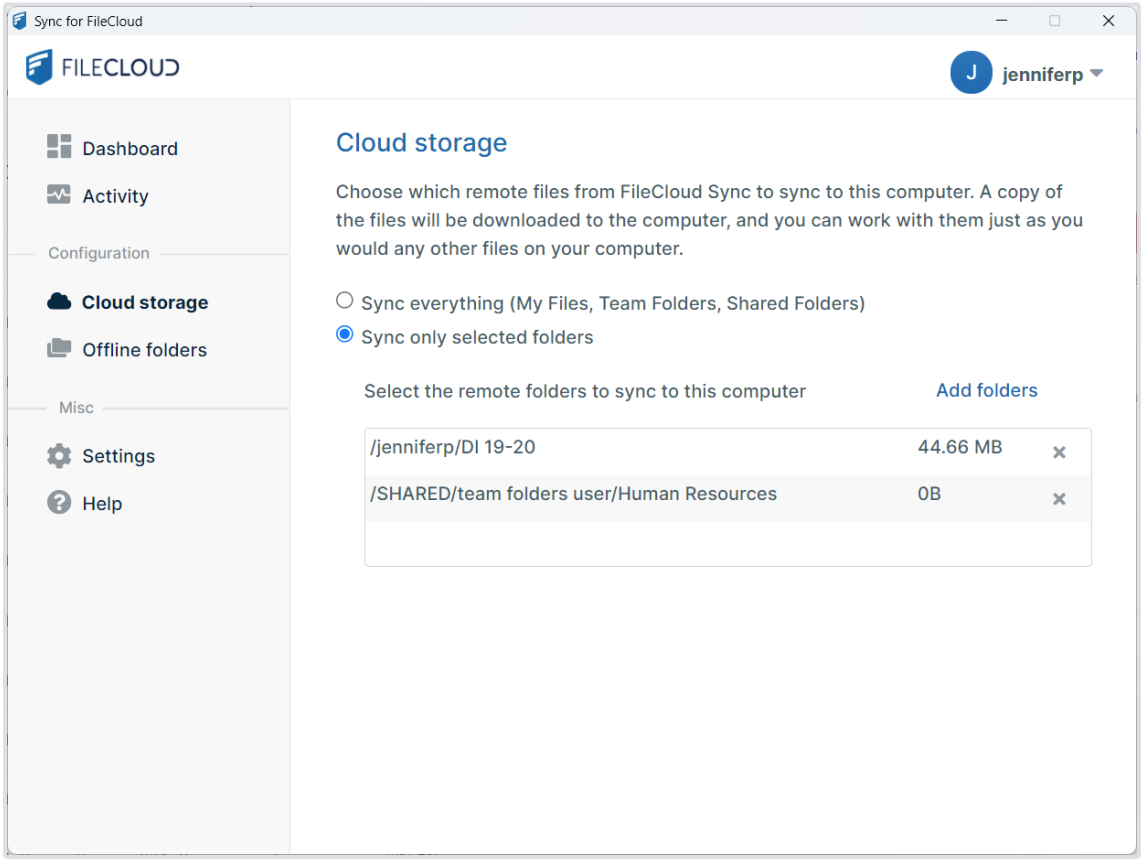
1. In your system tray, right-click on the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Dashboard**.
3. In the navigation pane of the dashboard, click **Cloud Storage**.
   The **Cloud Storage** window opens.
4. Select the radio button for **Sync only selected folders.**
5. Click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



The **Select Folders** dialog box opens.

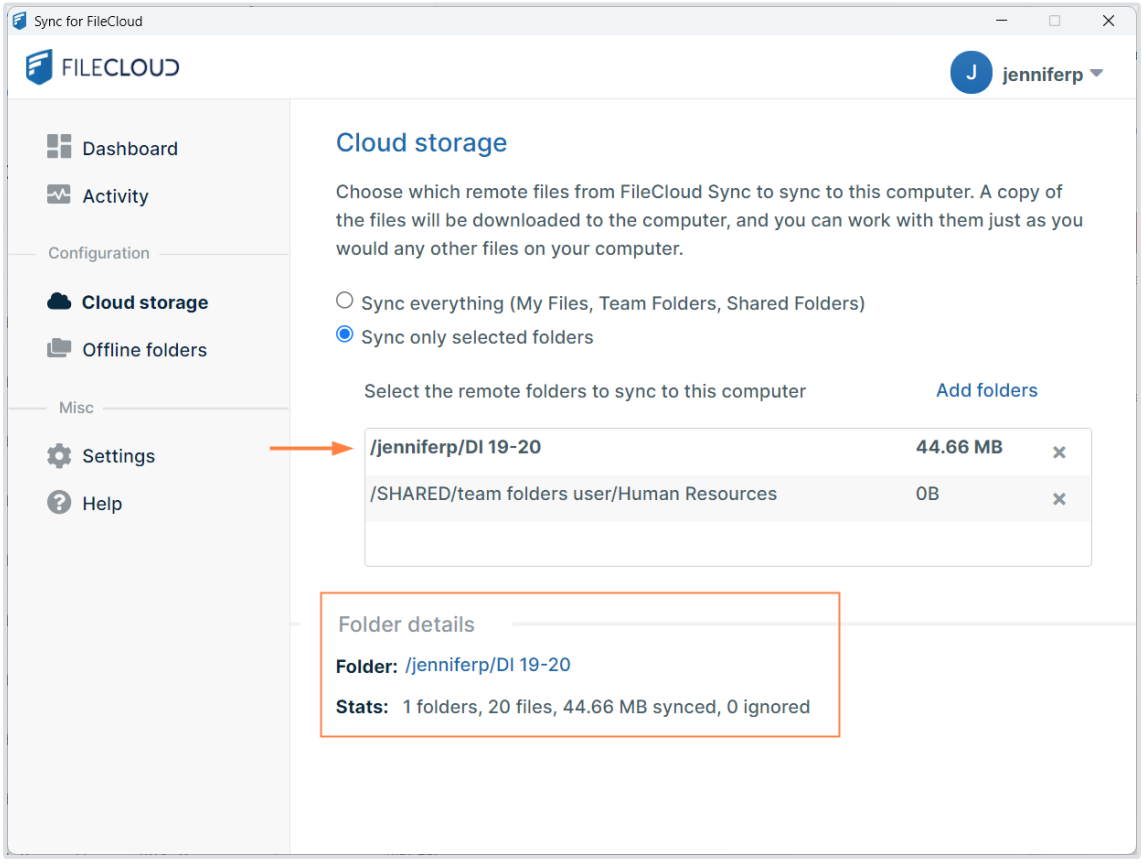


6. In **My Files**, **Team Folders**, or **Shared with Me**, navigate down to a folder that you want to sync, and choose **Select**.
7. Repeat steps 5 and 6 for each folder that you want to sync.



To view Sync details about your selected sync folders:

- In the **Cloud Storage** window of the dashboard, click one of the selected folders.
  Below it, the details about the most recent sync are listed: the number of folders synced, the number of files synced, total MB synced, and the number of files ignored (not synced).



To remove a folder from selective sync:

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

To return to syncing all folders:

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

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

Selective Sync Behavior when Centralized Configuration is set

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

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

Advanced Offline Sync mode



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



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

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

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

To enable advanced mode:

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

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

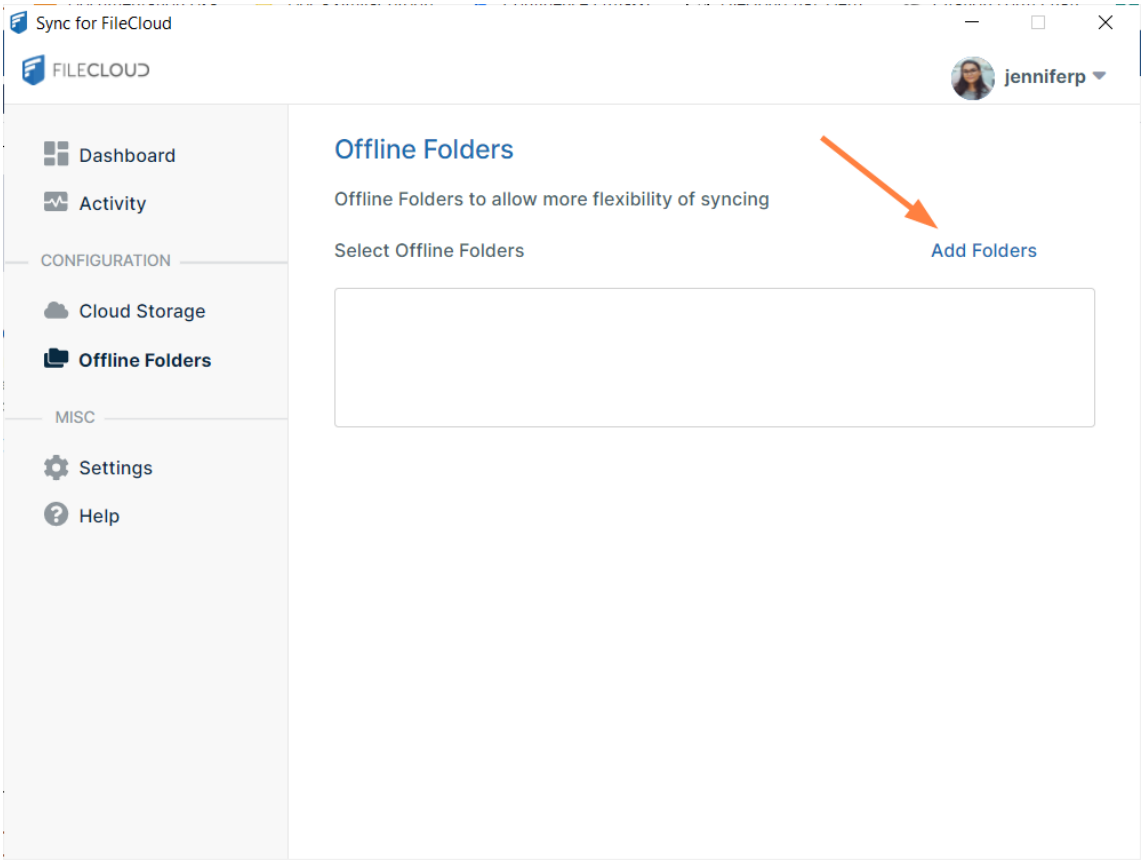
3. Add the following entry:

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

4. Restart Sync.

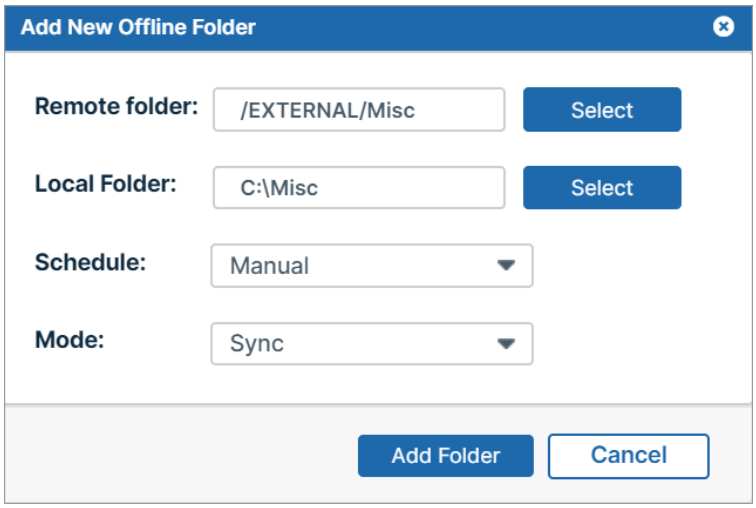
To add a folder in advanced mode:

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

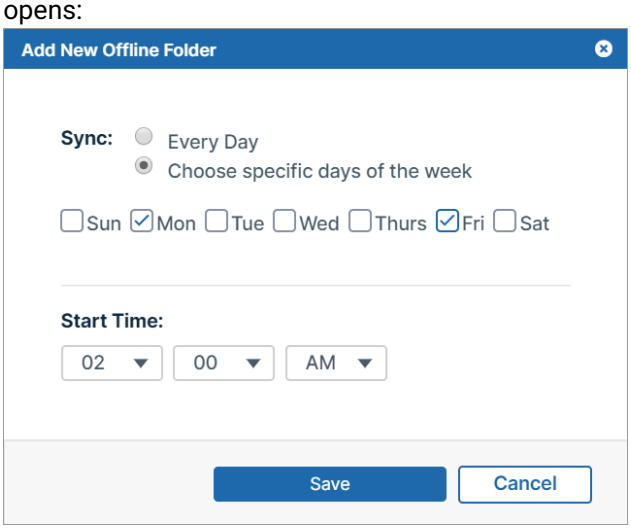


The **Add New Offline Folder** dialog box opens.

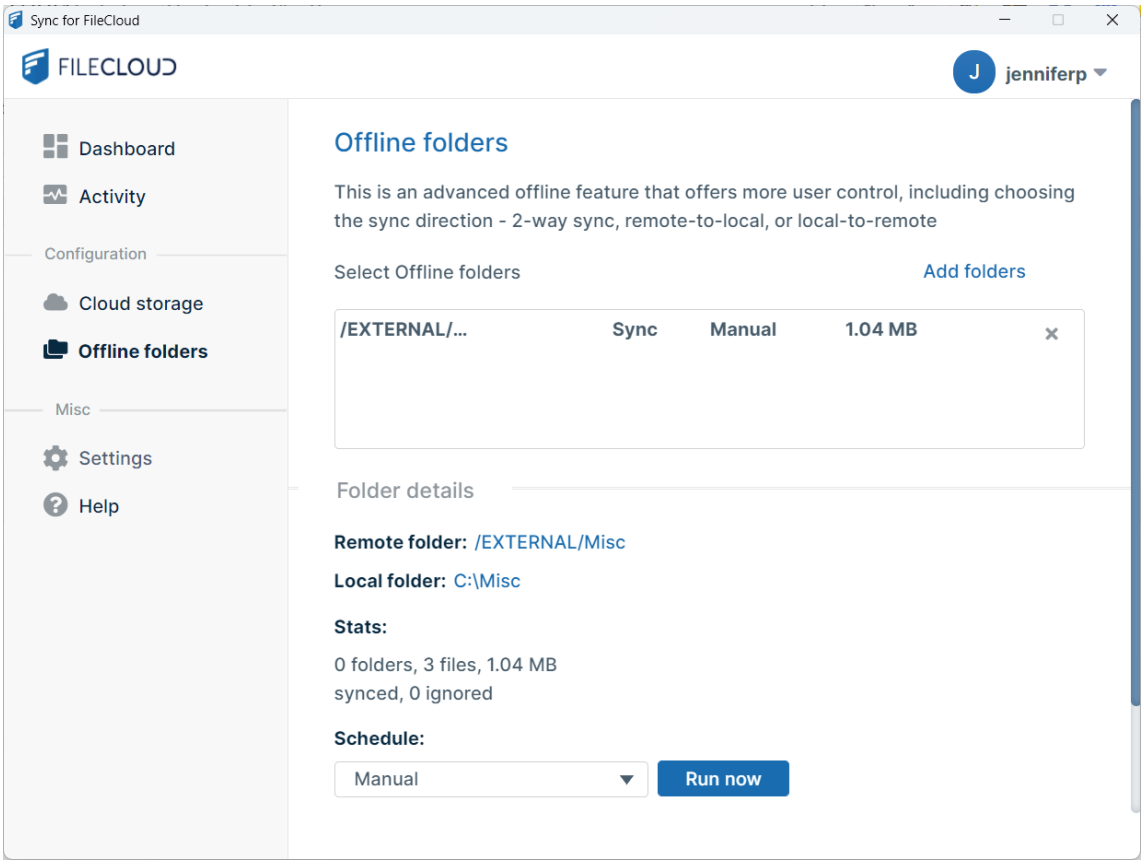
5. In **Remote Folder**, select the location to sync to.
6. In **Local Folder**, select the location to sync from.



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



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



When advanced offline sync mode is enabled:

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

Backing Up Files

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

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

Configure which files are backed up

Configure the backup schedule

View and restore backups

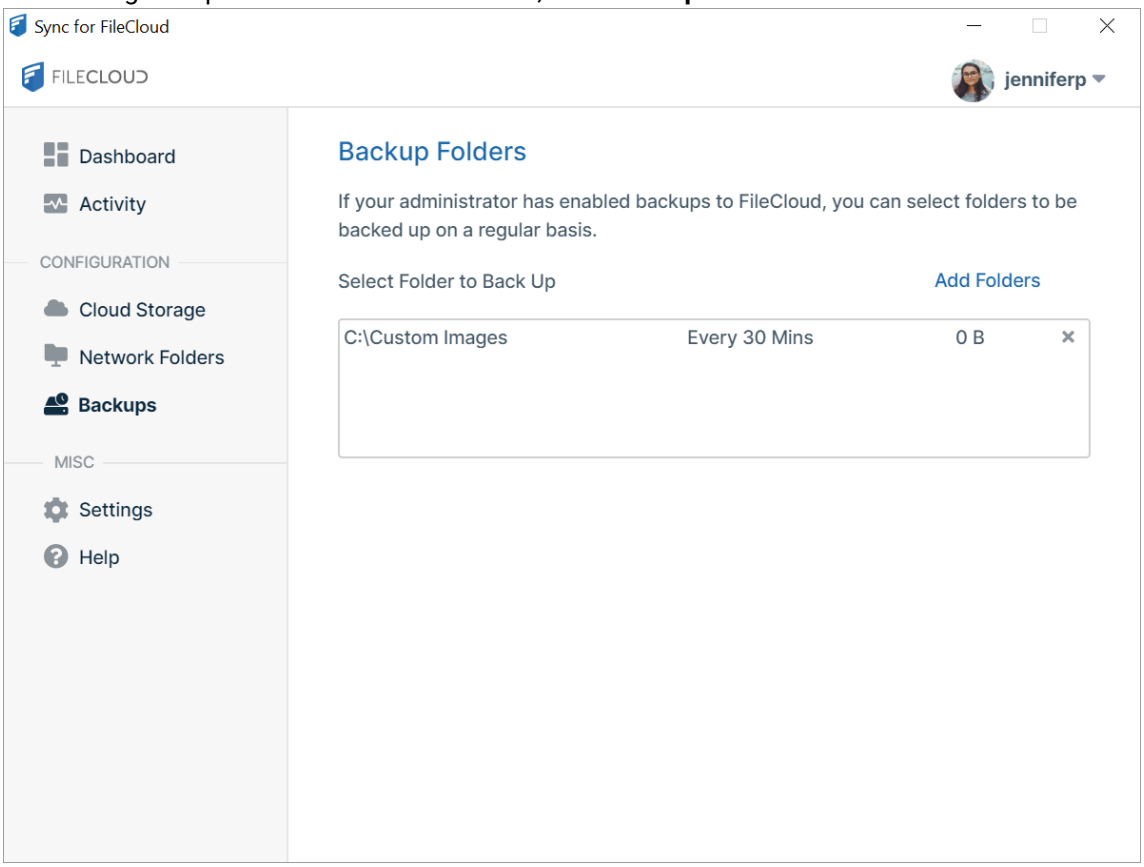
Selecting Files to Backup

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

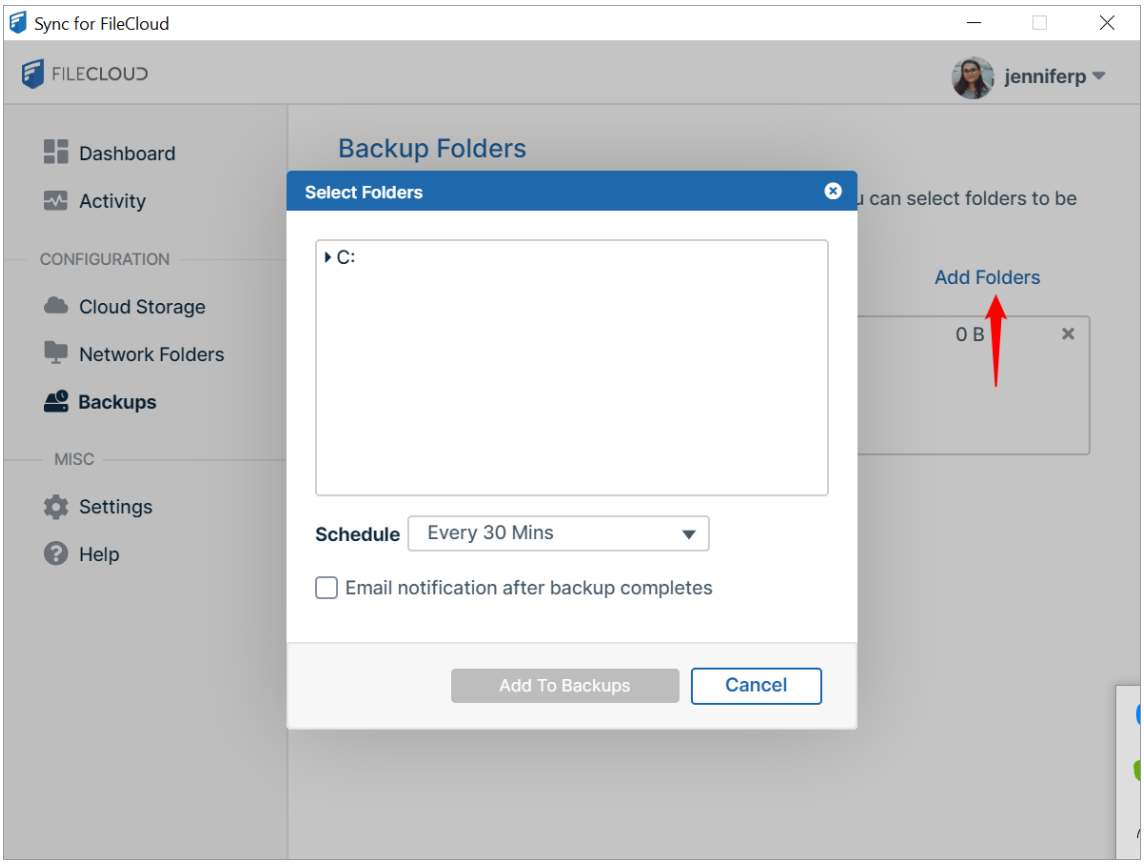
The following procedure explains how to add or modify file and folder backup in Sync after you have logged in. To set up backup when you log in to Sync, see Step 4 Backup Folders.

To select the files you want backed up:

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

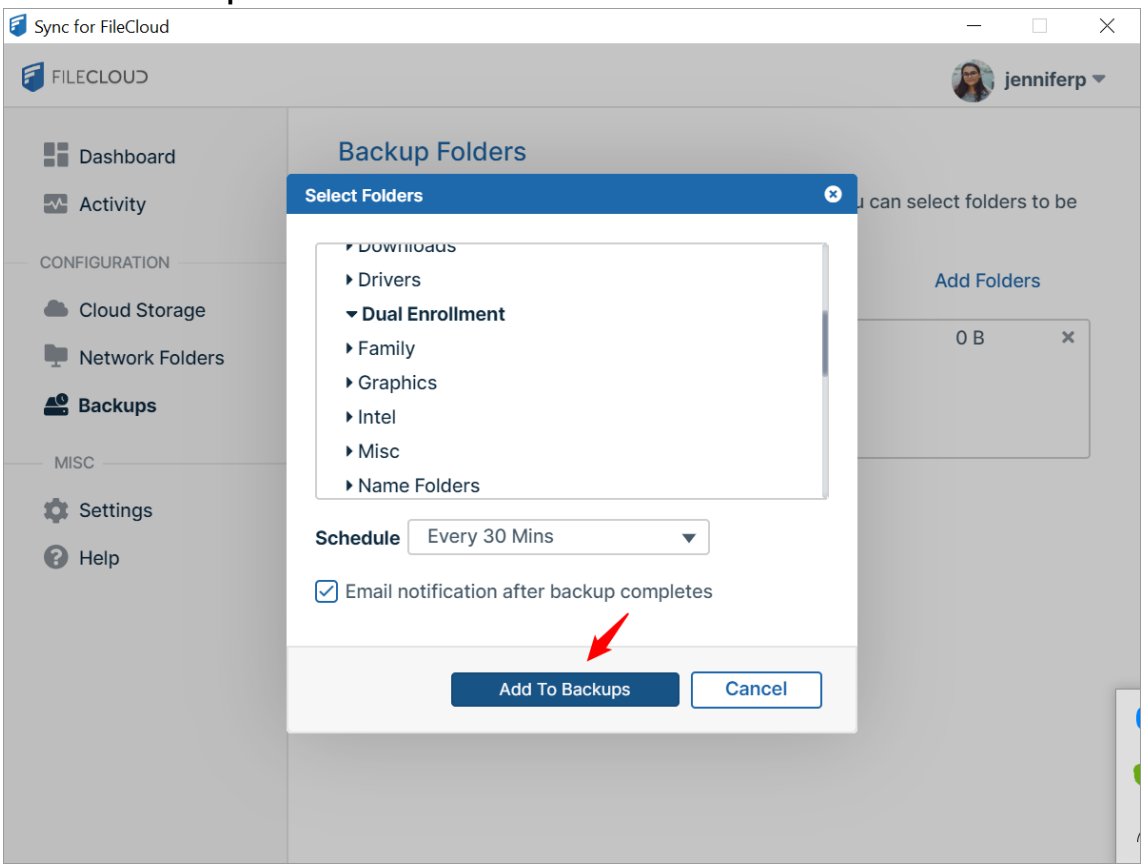


4. Click **Add Folders**.
   The **Select Folders** dialog box opens.

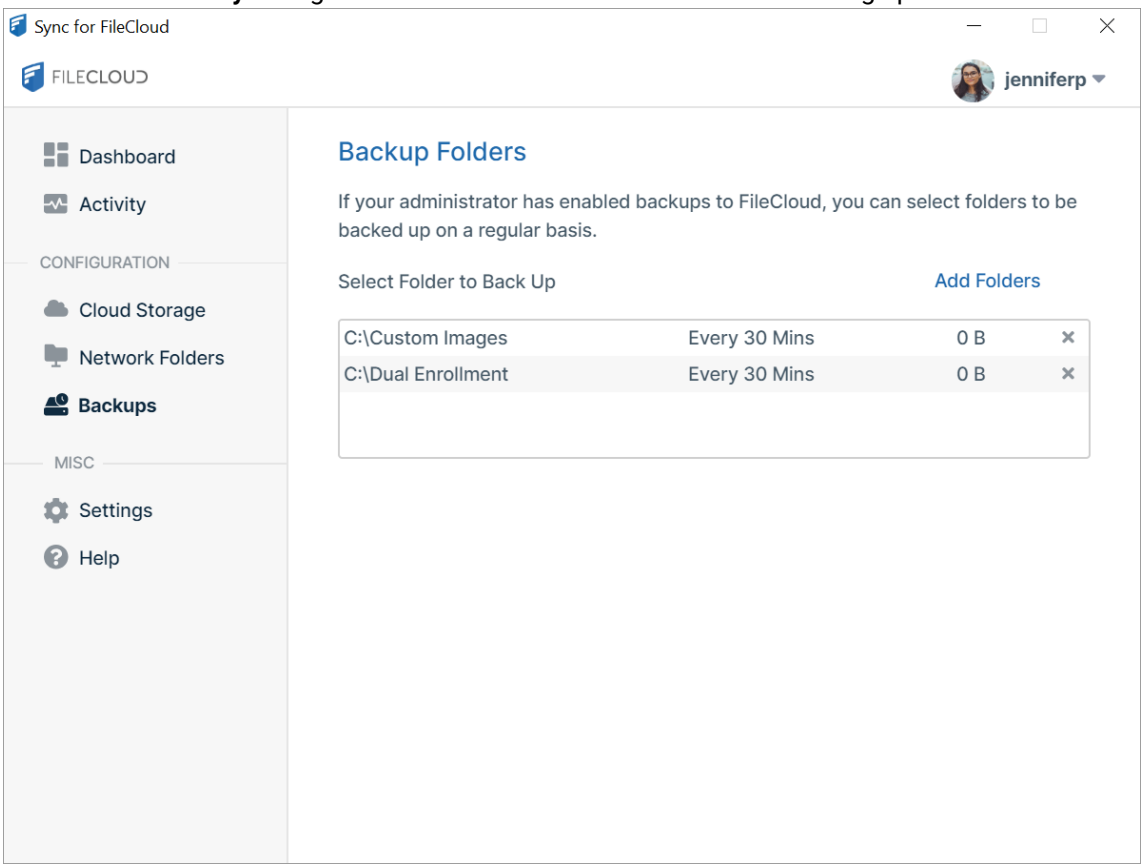


5. Expand the directory to the folder that you want to back up.
6. In **Schedule**, choose how often you want to back up the folder.
7. Check **Email notification after backup completes** if you want to be notified each time the folders in the directory are backed up.

8. Click **Add to Backups.**



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



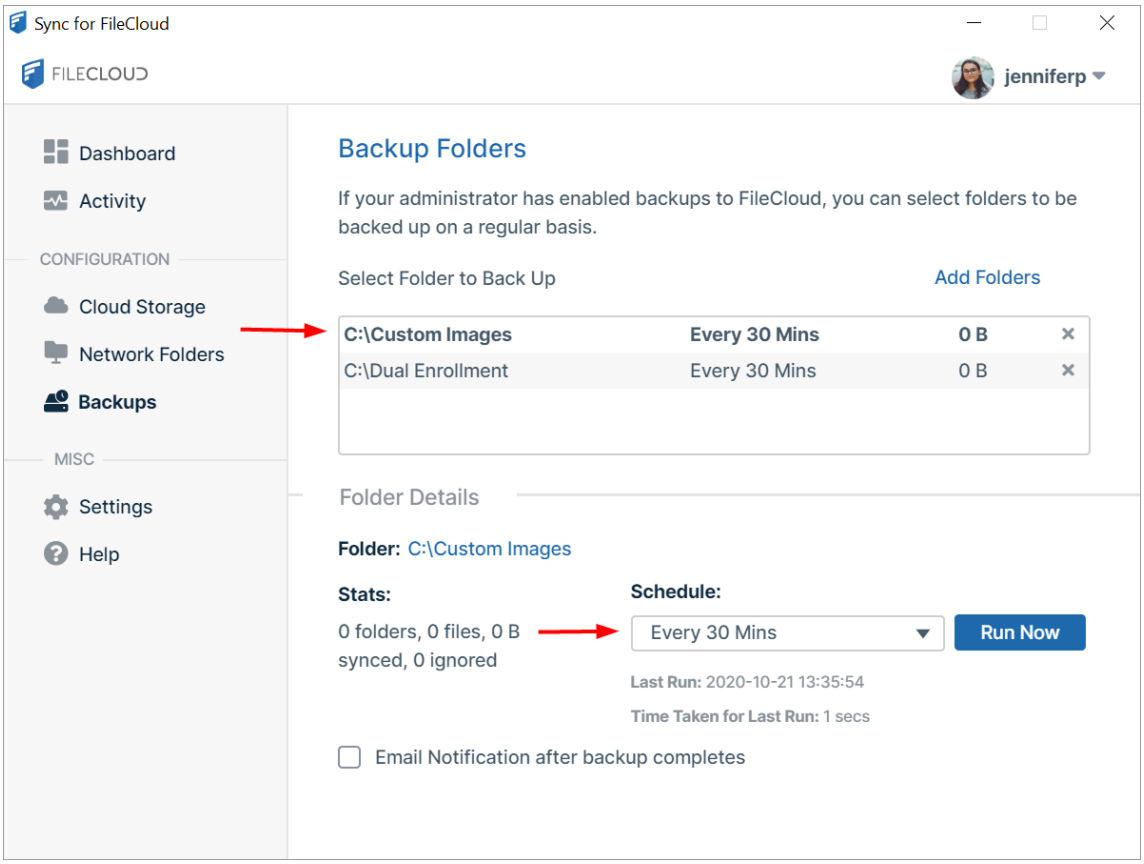
Configure the Backup Schedule

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

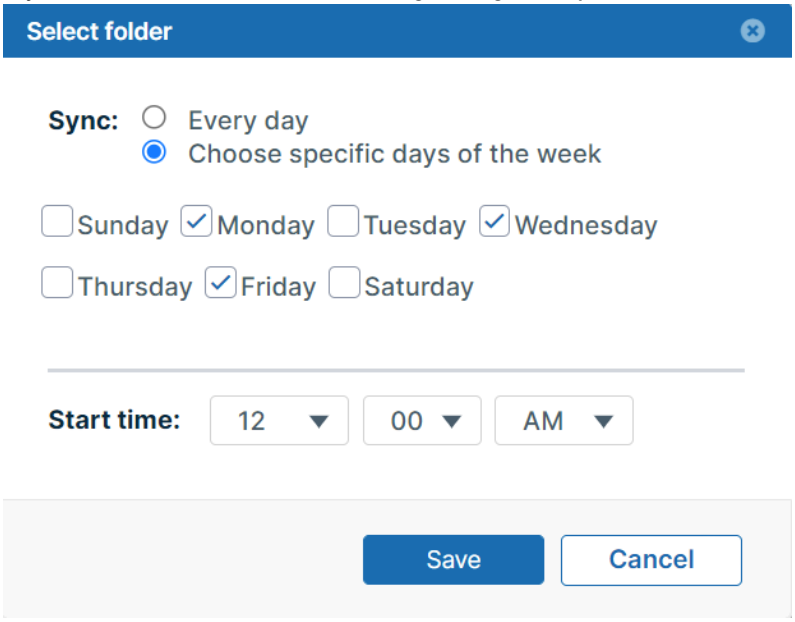
By default, folders selected for backup are backed up every 30 minutes.

To change the schedule:

1. Launch FileCloud Sync by right-clicking on the icon in your system tray and then selecting **Open**.
2. In the mini-dashboard, click **Dashboard**.
3. In the navigation pane of the main dashboard, click **Backups**.
4. Select a folder path in the box.
   Below it, folder details including its schedule are displayed.



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



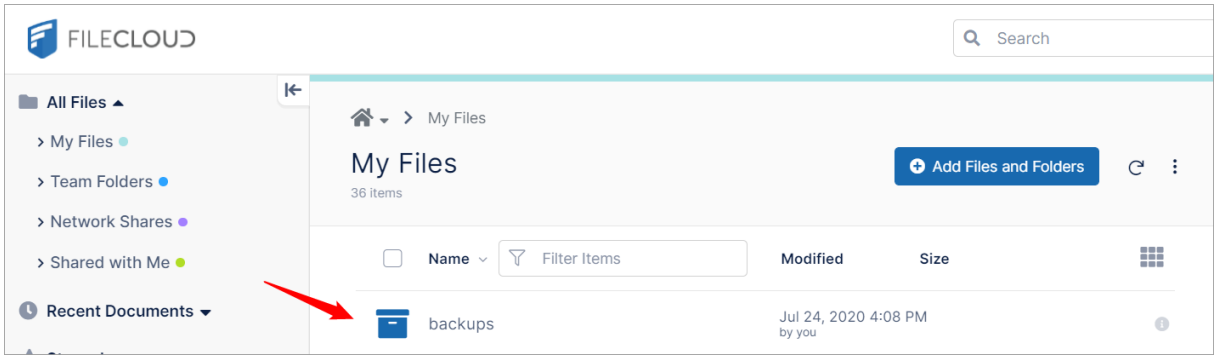
a. Set up your custom schedule. You can only choose one **Start Time** that the custom backup runs.
b. Click **Save**.
c. To run a backup now, click **Run Now**.

Viewing and Restoring Backups

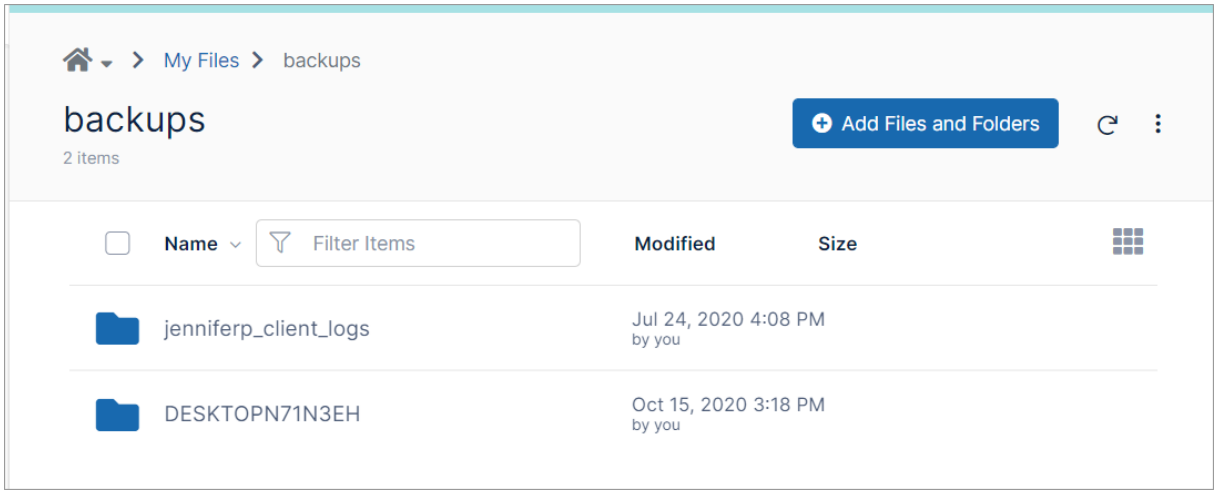
Viewing Backups

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

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



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



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

Restore Backups

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

Old Versions of Files in Backup

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

Deleted Files and Folders in Backup

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

Globally Backing Up User Files and Folders

This topic is for use by admins.

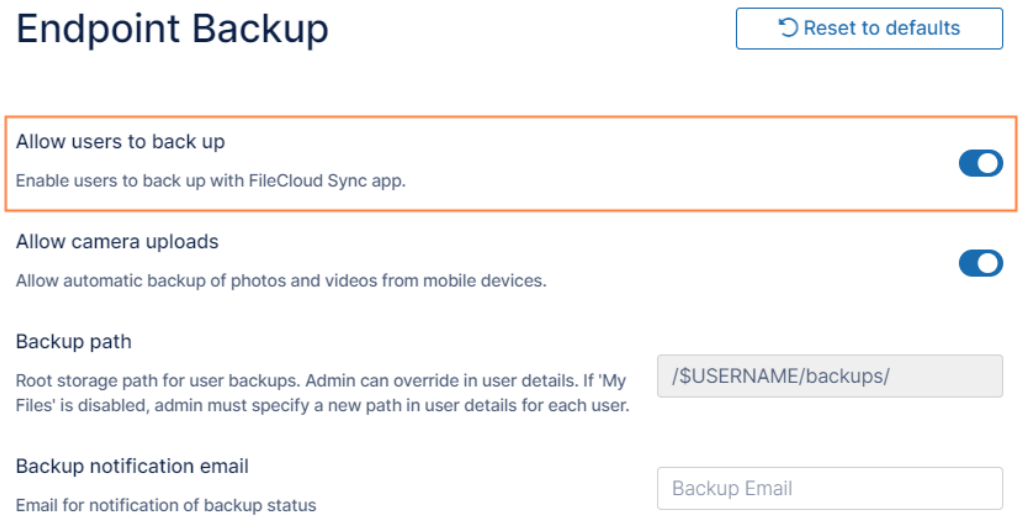
You can configure Sync backup so that specific local paths on all users' computers and devices are backed up. This ensures that certain user content, including configuration files, is always backed up and easy to restore.

Requirements:

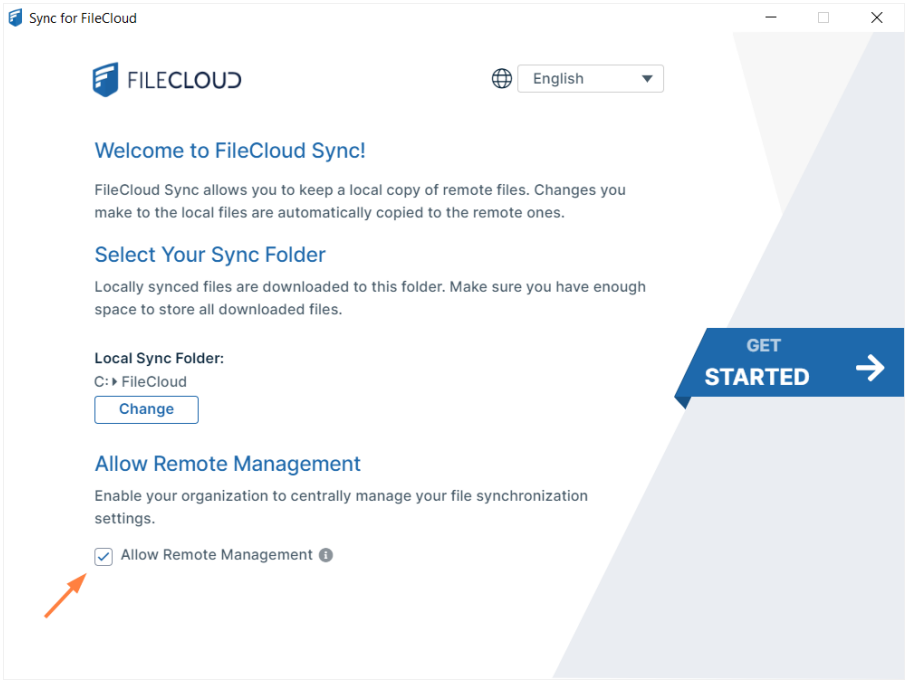
- Endpoint Backup must be enabled for FileCloud Sync from the Admin Portal.
- FileCloud Sync must be installed on the users' computers and **Remote Management** must be enabled.
- The Sync users' policy in the Admin portal must include this custom device configuration for Sync.

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

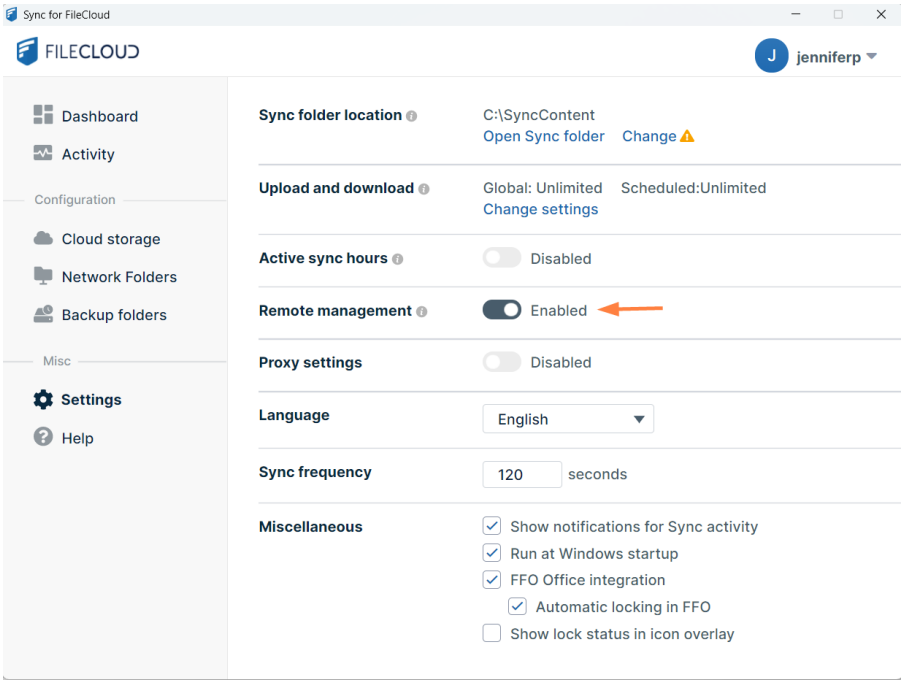
1. Enable **Endpoint Backup** for FileCloud Sync from the Admin Portal.
   a. In the FileCloud admin portal's left navigation bar, scroll down and click **Settings**. Then, on the **Settings** navigation page, click **Endpoint Backup**  .
   The **Endpoint Backup** settings page opens.
   b. Enable the **Allow Users To Backup** option and click **Save**.



2. **Install FileCloud Sync and enable Remote Management**
   For the device configurations set up in policies to take effect, enable remote management in FileCloud Sync.
   a. To enable remote management:
      either:
      - Have users manually enable the **Remote Management** option in the FileCloud Sync App. They can either do this on the **Get Started** screen when they log in or in the **Settings** screen after they log in.



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



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

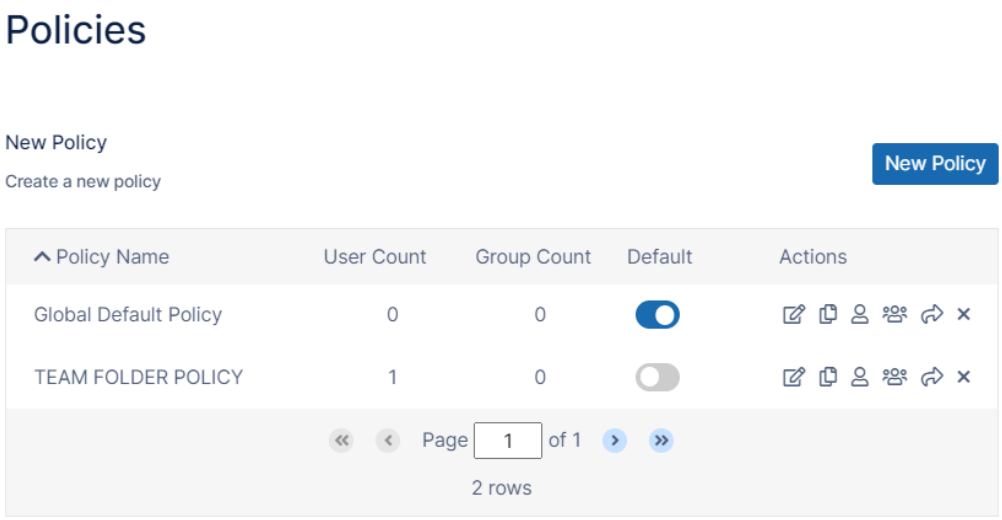
or:

- Enable the remote management setting for a mass deployment (set **allowcentralmgmt** to **1**). See Mass Deployment - Default Configuration Support for

help with the configuration.
Mass deployment registry entries must be created before FileCloud Sync is initialized in the users' local machines or the configuration in the registry will not take effect.

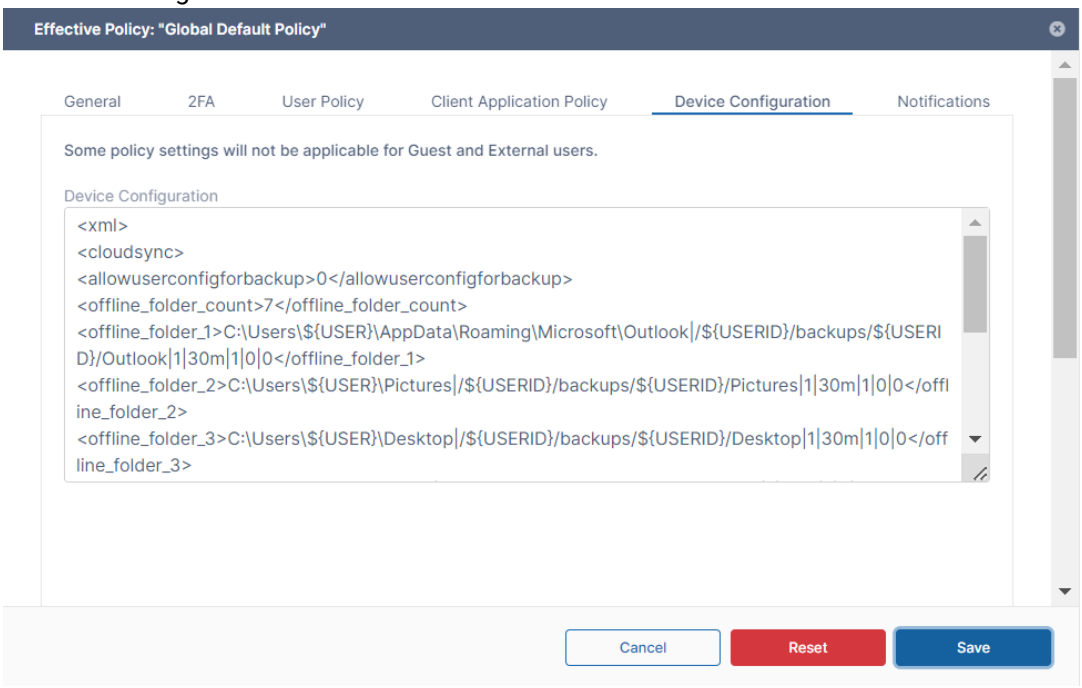
You may set a registry key to hide the **Allow Remote Management** and **Remote Management** settings in Sync so that users cannot disable remote management. See Device Configuration XML For Sync for instructions.

3. In the policy used by Sync users, set a default device configuration for FileCloud Sync.
   For help creating the XML, see the Device Configuration XML documentation for Sync.
   a. In the FileCloud admin portal's left navigation bar, scroll down and click **Settings**. Then, on the **Settings** navigation page, click **Policies** .
   The **Policies** settings page opens.



   b. Edit the policy assigned to the user or group.
   c. Click the **Device Confgiuration** tab.

d. Enter the configuration in XML format.



Below is a sample script to use:

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

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

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

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

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

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

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

Managing Files in File Explorer

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

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

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

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

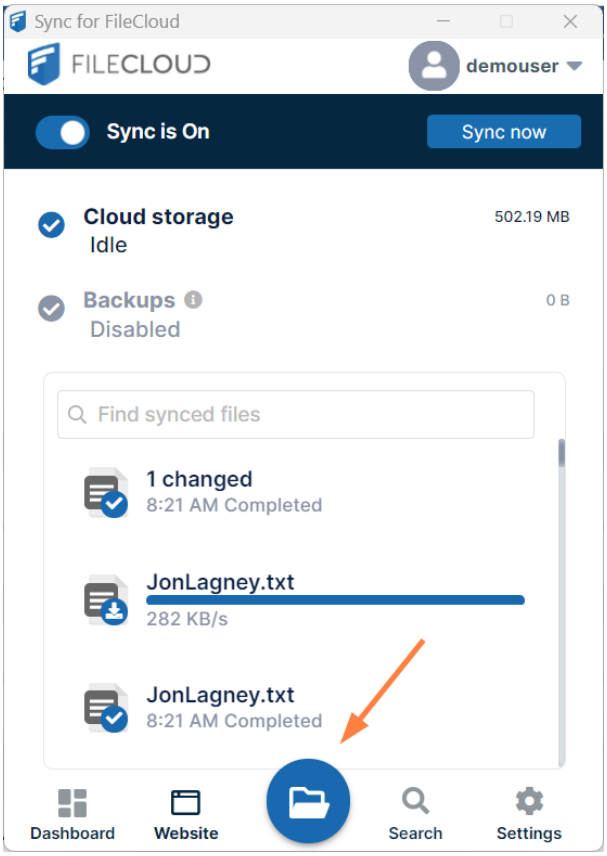
In this section:

Browse My Sync Files

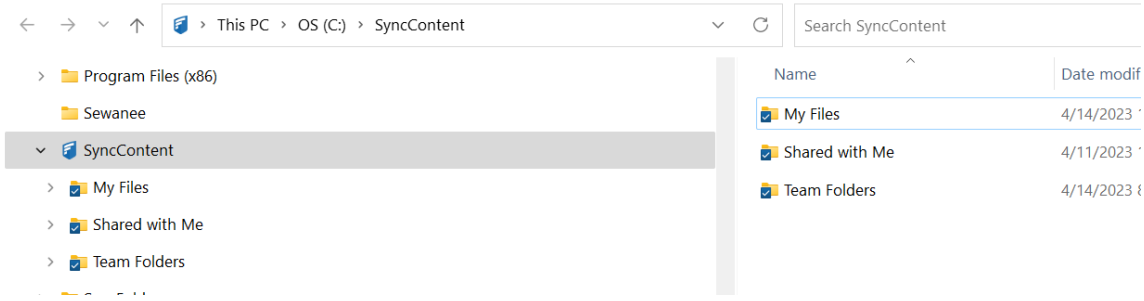
FileCloud Sync appears as a mapped drive in a file explorer window in Windows Explorer and Mac OSX Finder.

To open Sync in file explorer

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



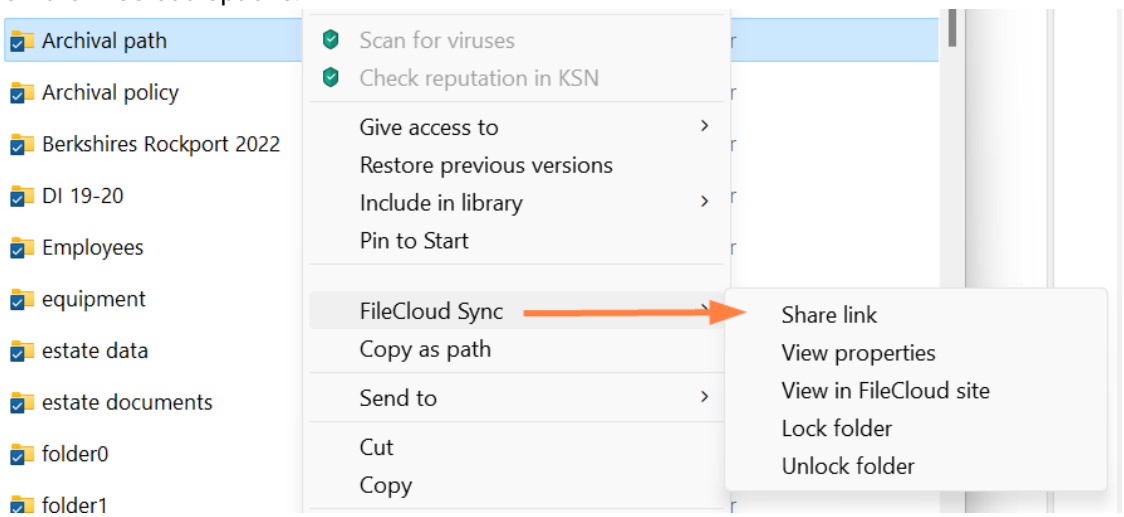
Your Sync folder in file explorer opens. It has the same folders for My Files, Network Folders, and Shared with Me that appear in the FileCloud user portal.



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

To view FileCloud options:

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



Sharing Files in Sync

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

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

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

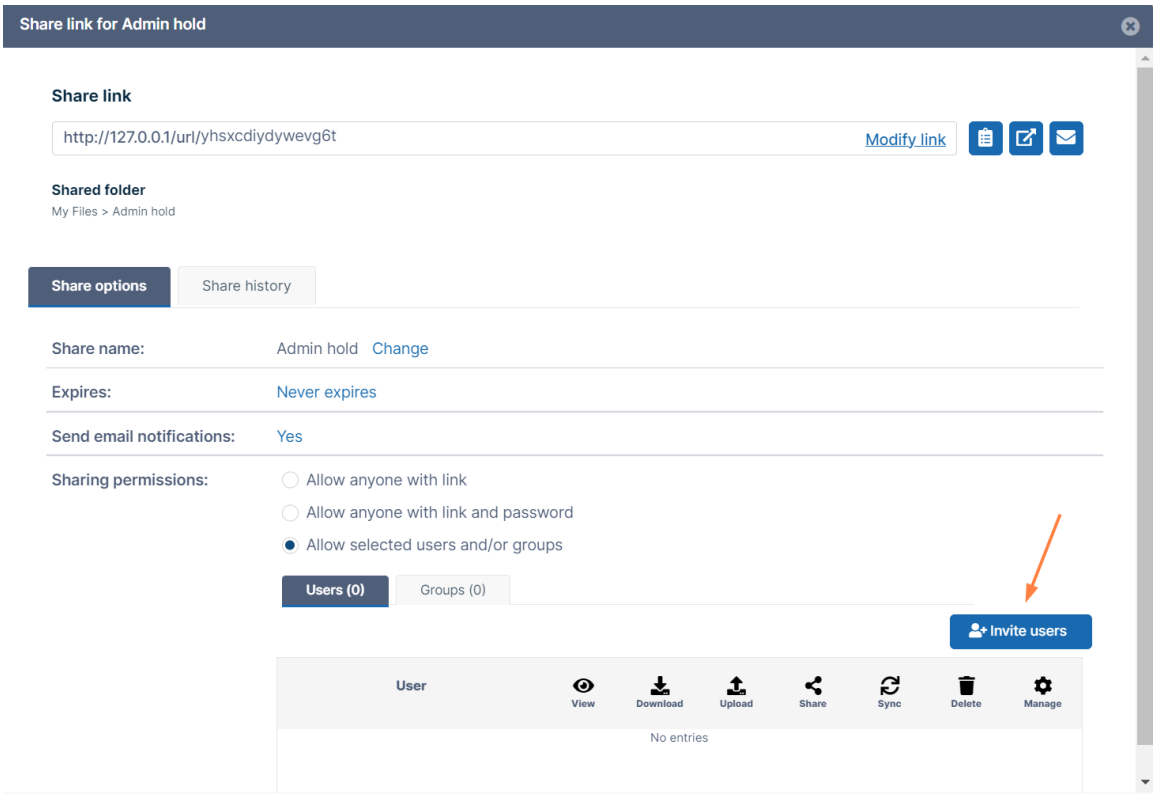
You can share a file in many different ways.

	Requires a FileCloud Account	Set Permissions	Set Options	Share with Everyone	Share with a Specific User
Public	✗ Anyone with the link can access	✓ View ✓ Download	✓ Share Name ✓ Expiration ✓ Restrict Downloads ✓ Notifications ✓ Require Password	✓	✓
Private	✓ Invite those without an account to create one	✓ View ✓ Download ✓ Share	✓ Share Name ✓ Expiration ✓ Notifications	✗ Add Groups to share with multiple users at once	✓ With a FileCloud account

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

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

The **Share link** window opens. By default, the share is private but no recipients are included. You can add recipients, or make the share public (allow anyone with the link to view the share), and send the link to the person or people you want to share it with.



In this section:

Sharing Files Publicly in Sync

By default, file shares are private, and you can make them available to specific people. You can share a file so that anyone can access the file even if they don't have a FileCloud account.

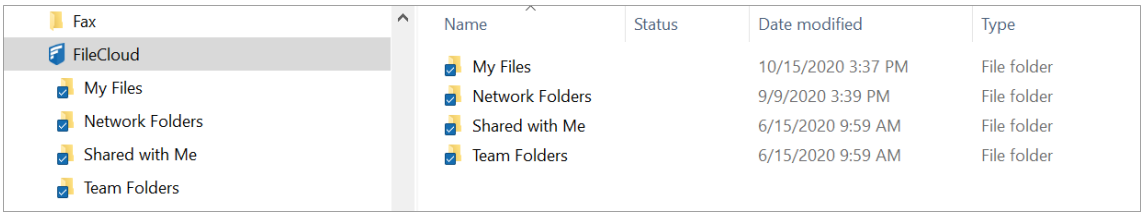
When you share a file:

- A **Share link** window opens to provide the link. By default the share is private.
- Under **Share options** you can change the share to **Allow anyone with link**.
- You can send the link in an email inviting users to access the share.

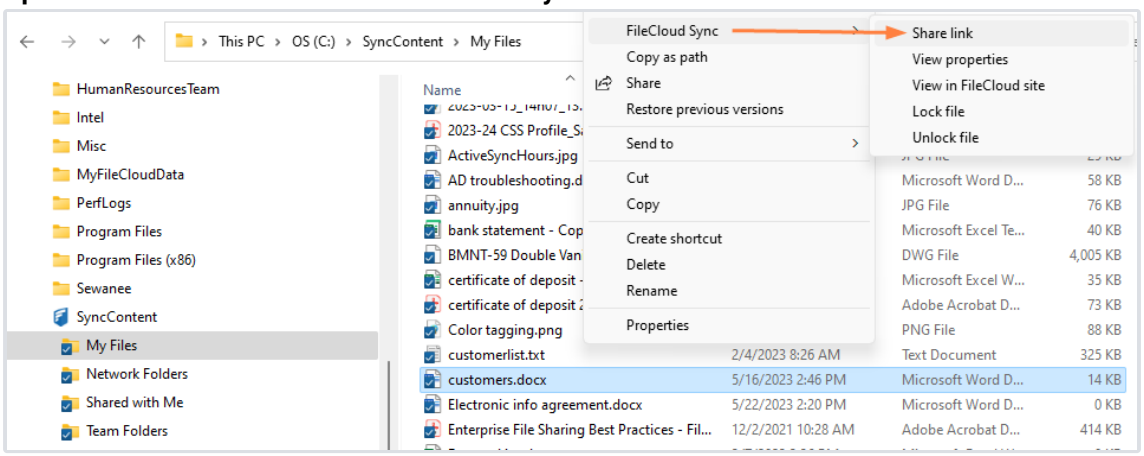
Create a public share:

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

1. At the bottom of the mini-dashboard, click the folder icon.
   Your Sync folder in file explorer opens.

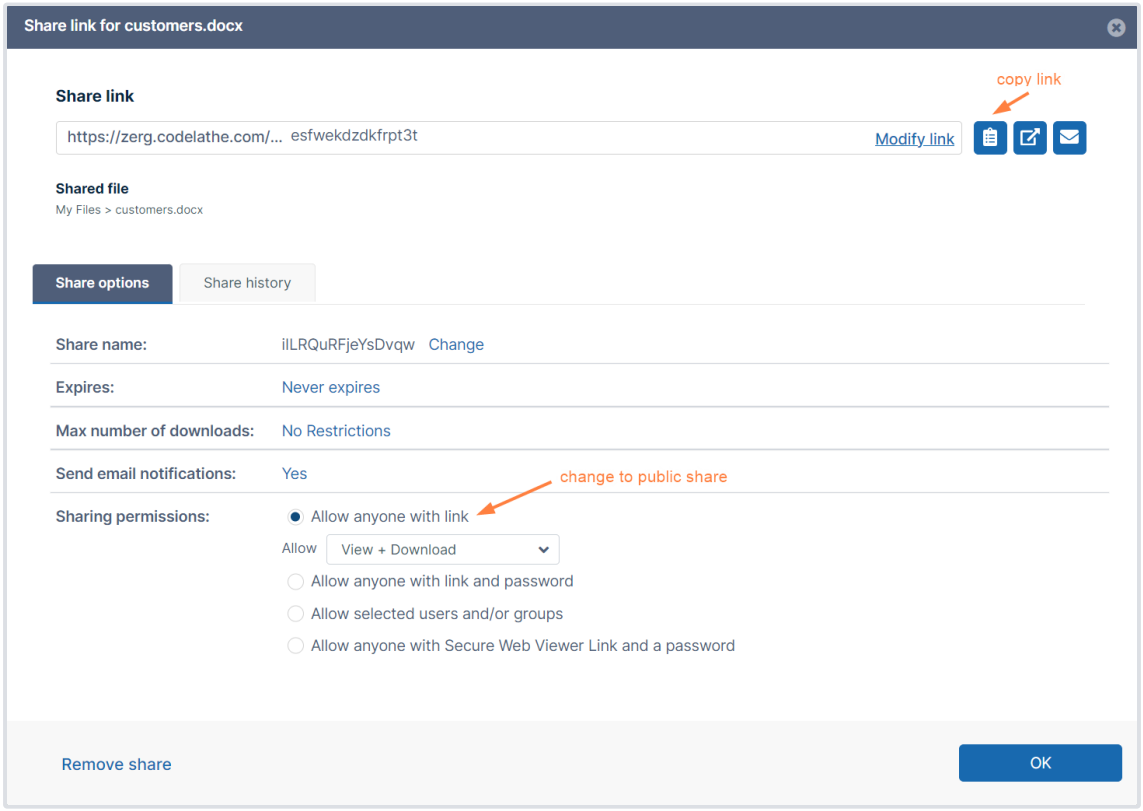


2. Navigate to the file or folder you want to share, then right-click on it and choose **Show More Options**. In the next menu choose **FileCloud Sync > Share Link**.



The **Share link** dialog box opens. By default the share is private.

3. Under **Sharing permissions**, click **Allow anyone with link**, **Allow anyone with link and password**, or, if it's available, **Allow anyone with Secure Web Viewer Link and a password**.
4. Change any of the other options under **Share options**. See Sync: Share options for files for information about these settings.
5. To copy the link, click the **Copy Link** icon at the top of the screen.



Sharing Files Privately in Sync

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

Sharing files privately:

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

Users have the following permission options in private shares:

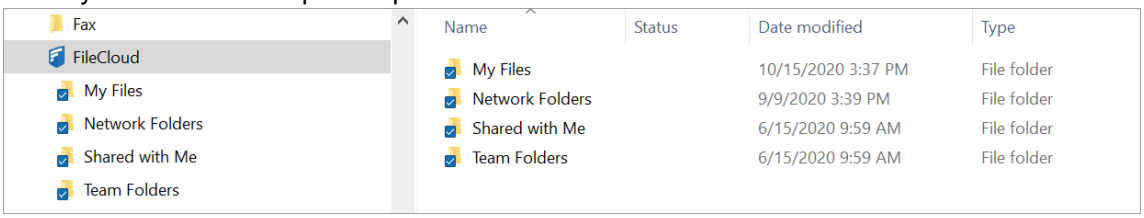
Permission	Description
Read permitted	Read permission allows users to view, browse and download files. Removing read permission removes the user from the share completely.
Download permitted	Download permission allows the user to download and save the file.
Share permitted	Share permission allows the user to share your file with other users. Share permission can be provided only if read and download permission are already provided.

To share files privately in Sync

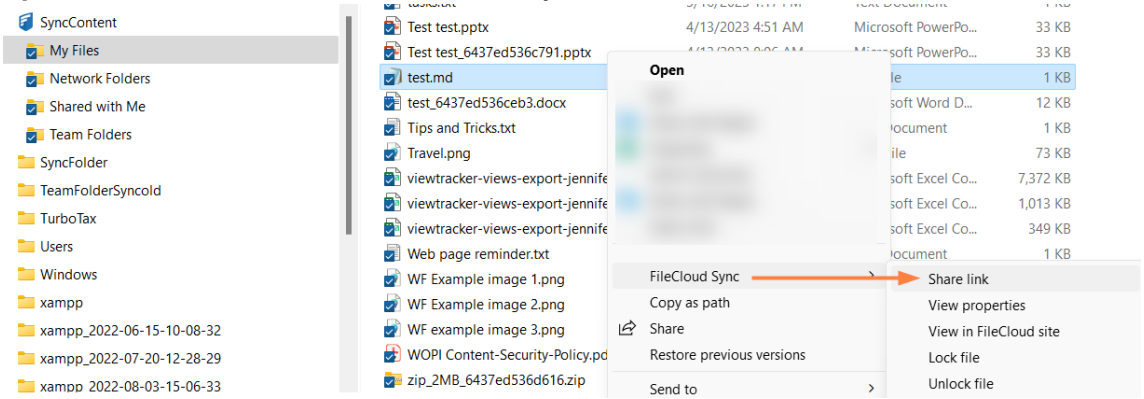
The procedure for sharing a file privately from the Sync folder in content explorer is nearly identical to the procedure for sharing a file privately from the user portal, Only the first few steps for selecting the file and choosing to share it are different.

Initial steps for sharing a file from Sync:

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



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



   The **Share link** dialog box opens. By default, the file is shared privately.
4. Go to Sharing Files Privately and continue from Step 2.

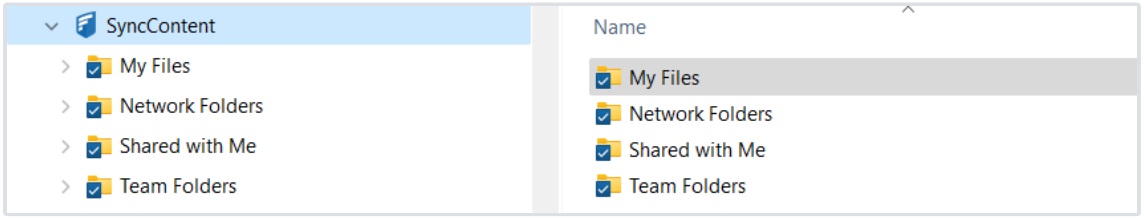
Sync: Share options for files

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

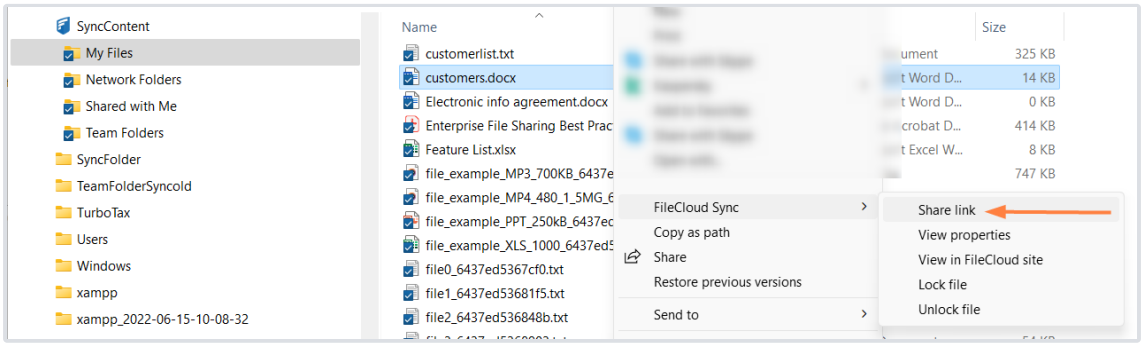
Note: To configure share options for a file that has already been shared, right-click a file in the Sync folder and choose **Share FileCloud Link**.

Perform advanced share actions:

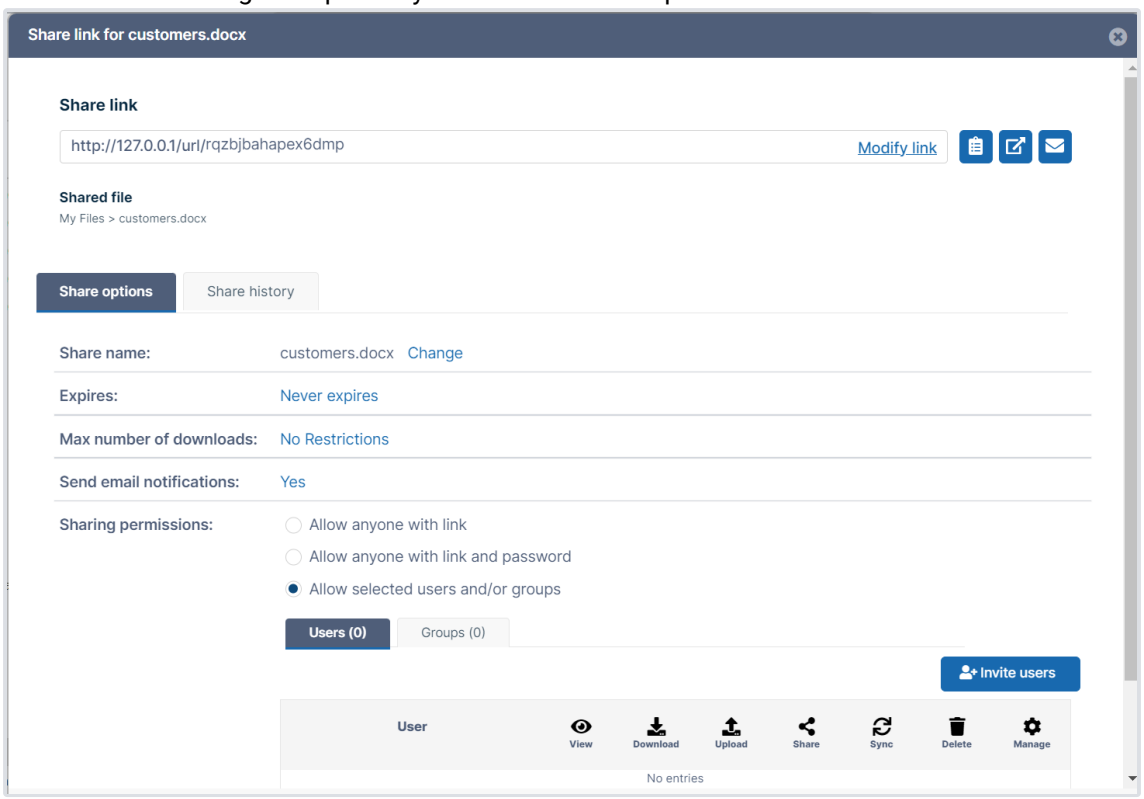
1. In your system tray, right-click on the Sync icon and choose **Open**.
2. At the bottom of the mini-dashboard, click the folder icon.
   Your Sync folder in file explorer opens.



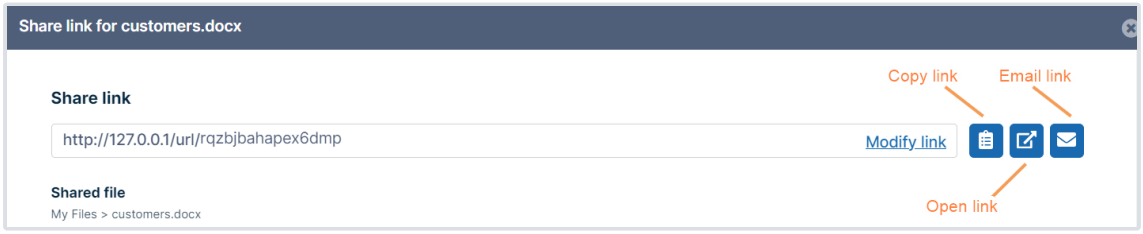
3. Navigate to the file or folder that you want to share, then right-click on it and choose **Share FileCloud Link**.



The **Share link** dialog box opens. By default the share is private.

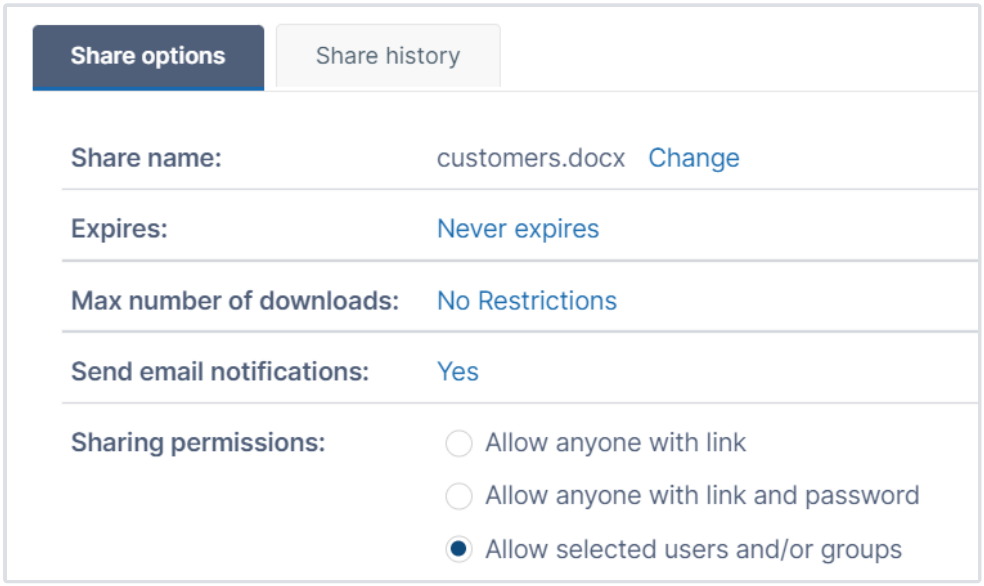


4. Click the icons beside the share link to perform basic actions on it.

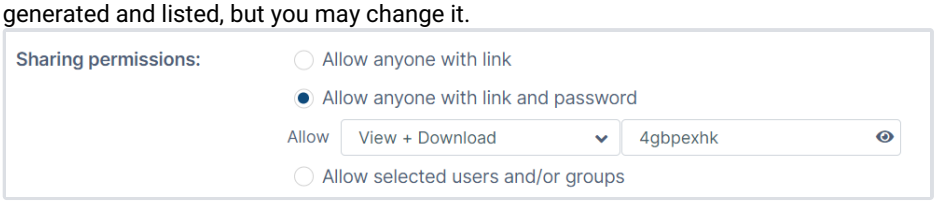
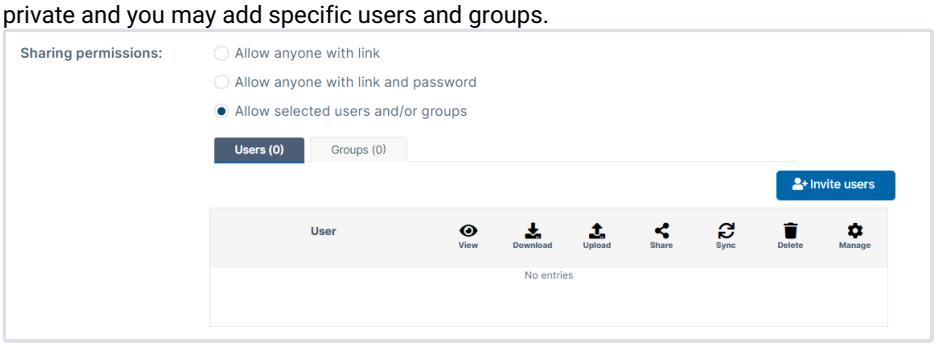


- Click **Copy Link** to paste the link into a message or email.
- Click **Open Link** to view the shared file in the FileCloud user portal.
- Click **Email Link** to email the link to one or more users.

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



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

Advanced option	To change
Password (Public Shares only)	Click the link, and click **Yes**. You may use the automatically generated password or change it to a more descriptive or memorable one. Check **Show Password** to check what you've entered.
Sharing permissions	Select an option: • If you select **Allow anyone with link**, the share is public. • If you select **Allow anyone with link and password**, the share is public, and users must enter a password to view it. When you choose this option, a password is automatically generated and listed, but you may change it.  • (**Default**) If you selected **Allow selected users and/or groups**, the share becomes private and you may add specific users and groups.  **When available**: • If you choose **Allow anyone with Secure Web Viewer Link and a password**, the share is public, and users must view it using a password through a secure viewer. See Using the Secure Web Viewer for more information. For help inviting users and groups and setting their permissions, see: Sharing Files Privately Public Share Options for Files Private Share Options for Files

Lock and Unlock Files in Sync

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

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

When a file is locked, the following conditions apply:

- The owner of the lock has full access to that file and can modify it
- An Admin can always override a lock

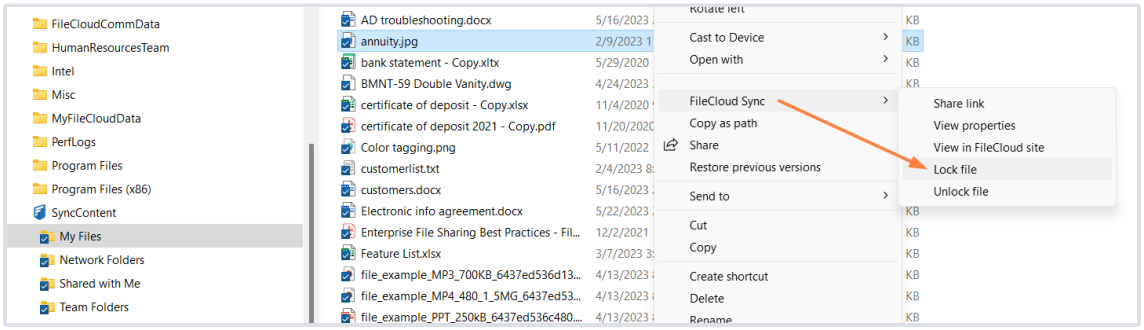
- Users can download and view the locked file
- Users cannot modify the locked file

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

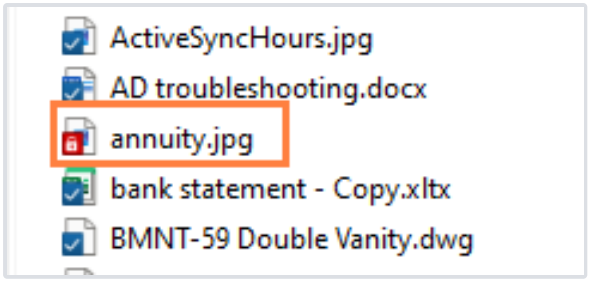
- User Portal accessed from a web browser
- FileCloud Drive
- FileCloud Sync
- Mobile clients
- WebDAV

To lock a file:

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

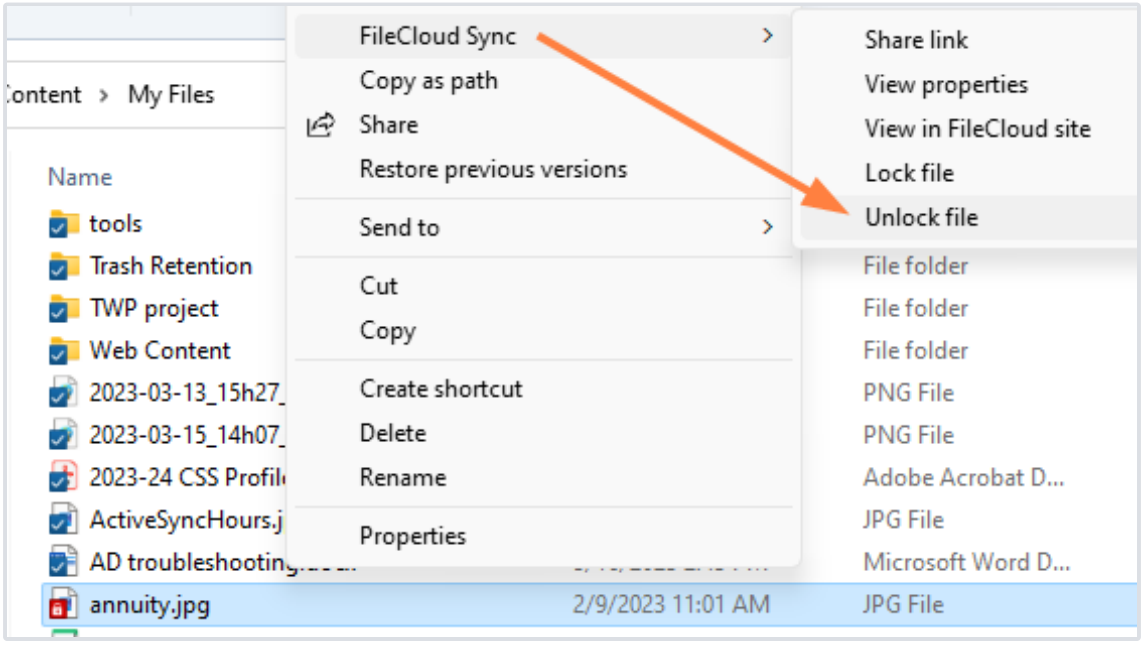


If you have checked **Show Lock Status in Icon Overlay** in Sync Settings, the red lock overlay icon appears on the file.

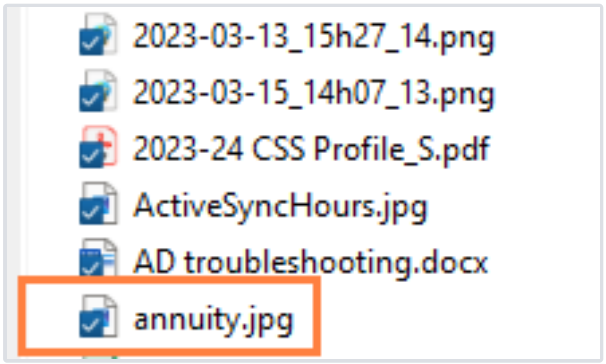


To unlock a file:

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



The file is unlocked:



Lock and Unlock Folders in Sync

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

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

When a folder is locked, the following conditions apply:

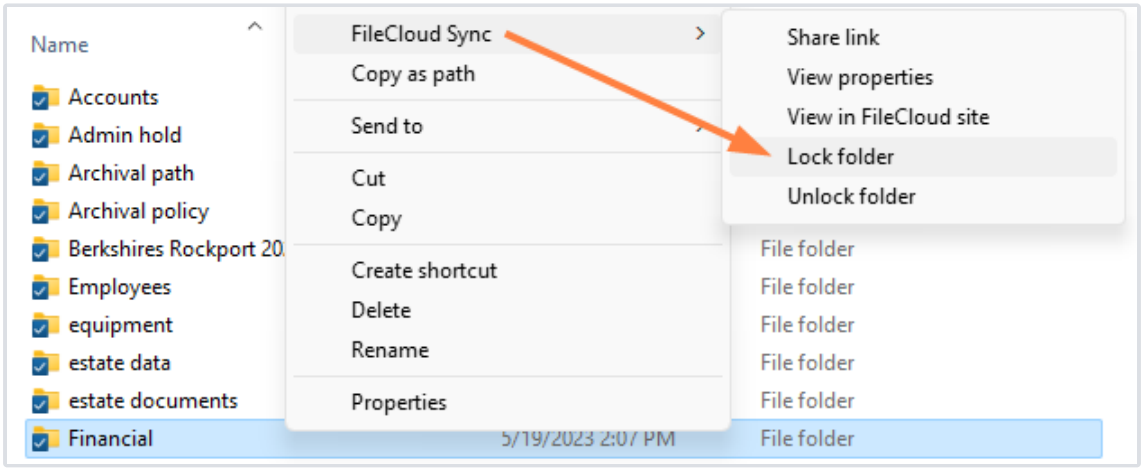
- The owner of the lock has full access to that folder and can modify it
- An Admin can always override a lock
- Users can download and view the locked folder
- Users cannot modify the locked folder

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

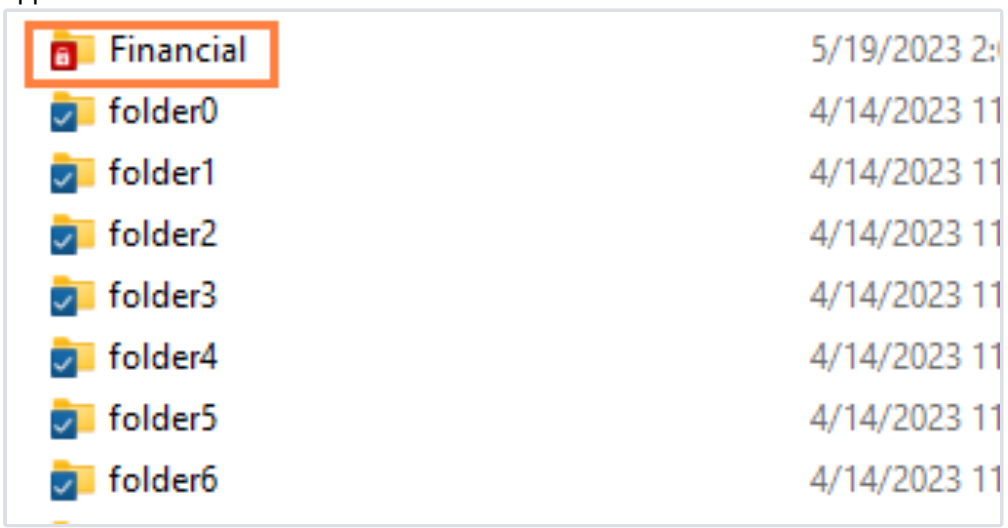
- User Portal accessed from a web browser
- FileCloud Drive
- FileCloud Sync
- Mobile clients
- WebDAV

To lock a folder:

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

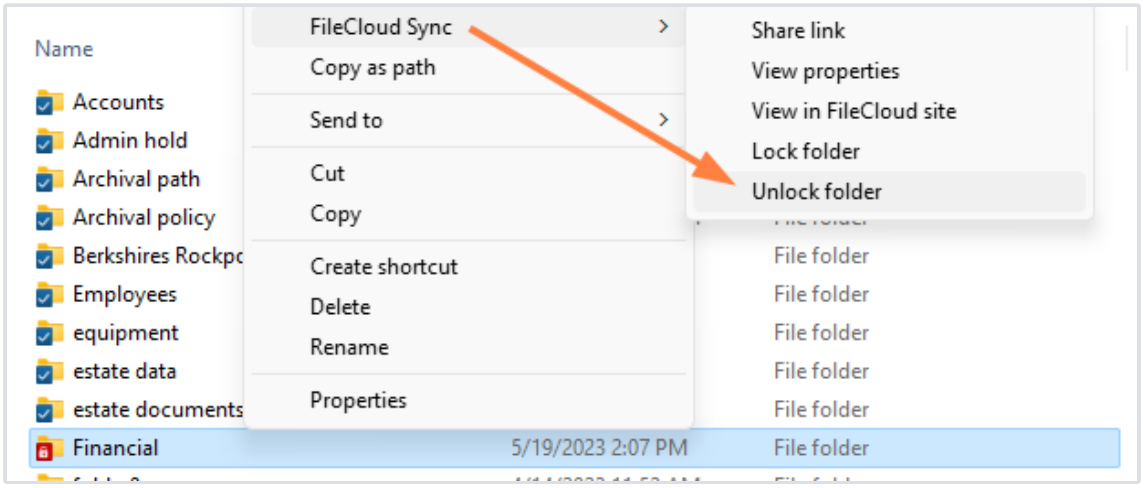


If you have checked **Show Lock Status in Icon Overlay** in Sync Settings, the red overlay icon appears on the folder.

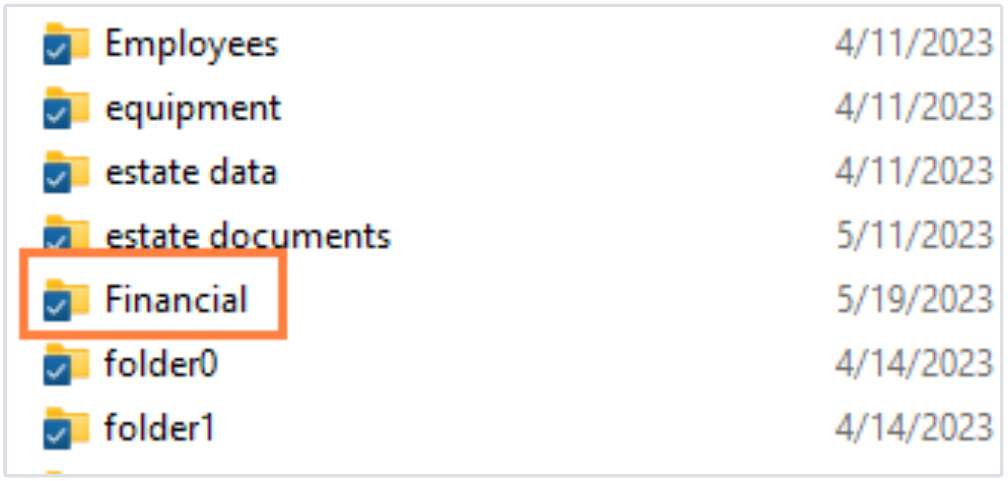


To unlock a folder:

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



The folder is unlocked:



Create a Direct FileCloud Link in Sync

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

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

- Shared with me
- Team Folders

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

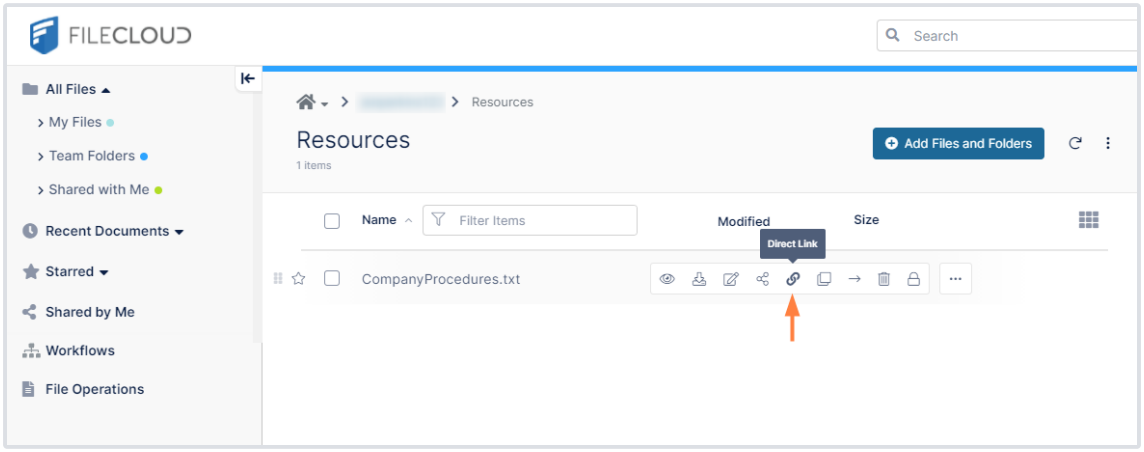
In the **Shared With Me** or **Team Folders** sections, you may create a link to a folder or a file to send to users in an existing share without creating a new share.

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

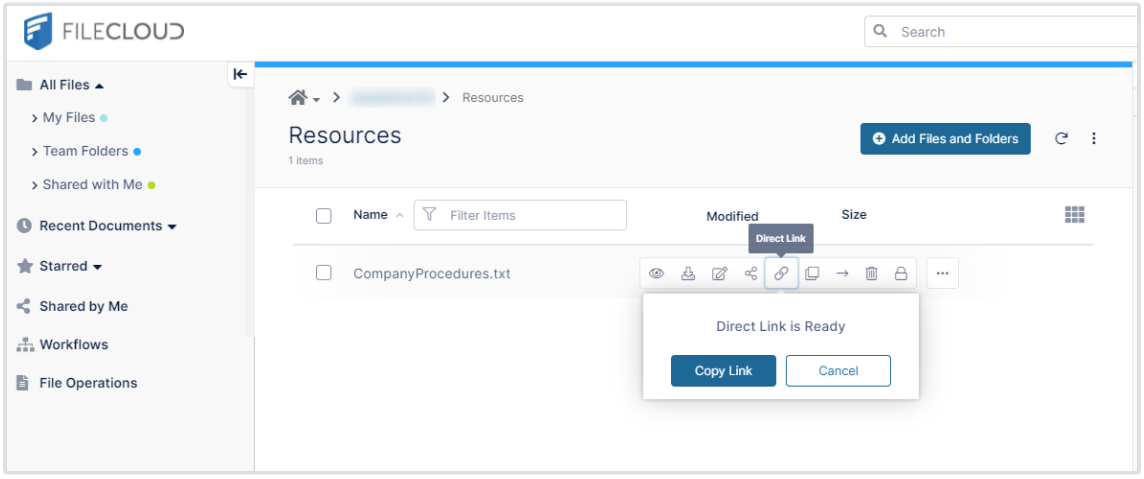
Limitation
For Team Folders, direct links to files in sub-folders that are created by users who have access to the parent folder and sub-folder will not work for users who only have access to the sub-folder, because the links will include the parent folder path, which does not exist in the file structure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

To create a direct link:

1. Navigate to the file or folder in **Shared With Me** or **Team Folders**.
2. Hover over the file or folder and click the **Direct Link** icon.



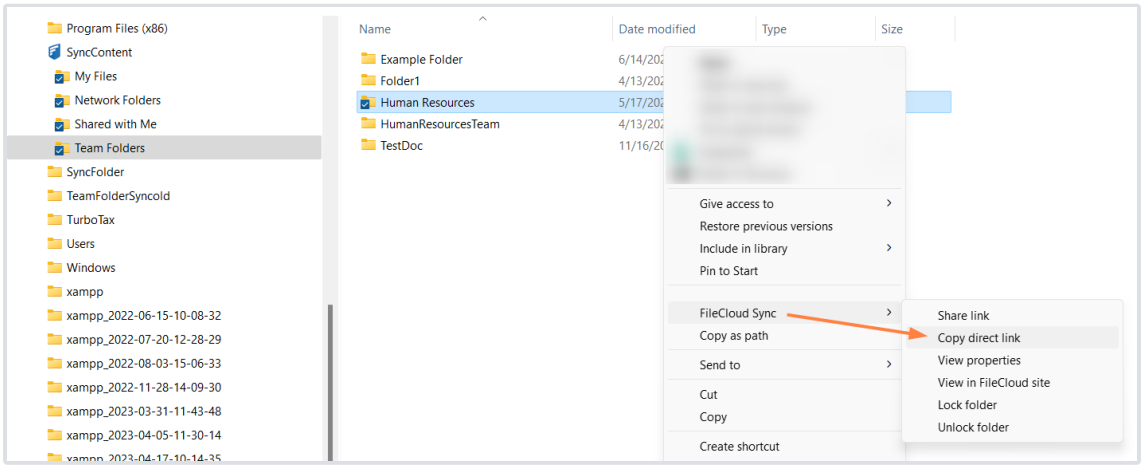
A **Direct Link is Ready** message pops up.



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

To create a direct link:

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



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

Performing file explorer actions on Sync files

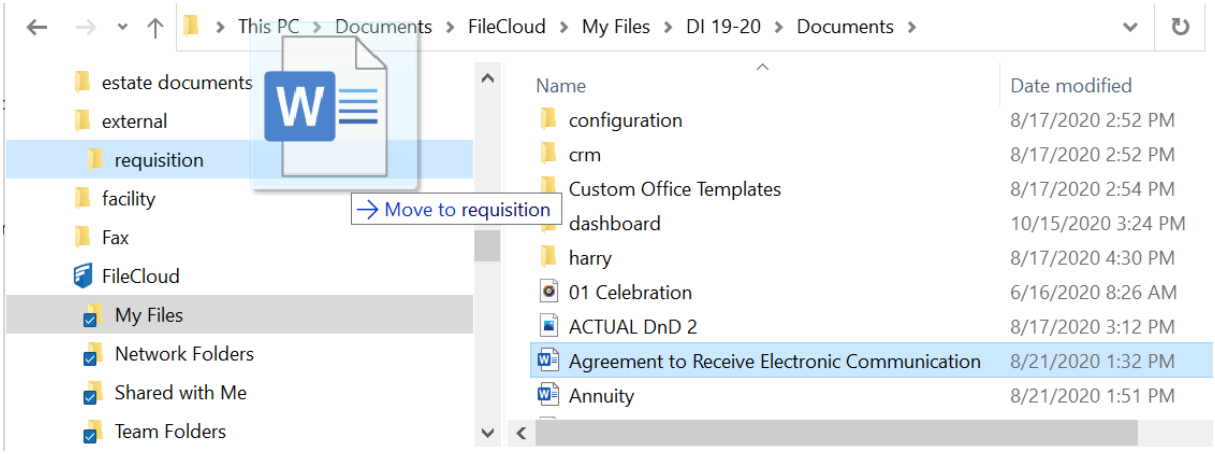
You can perform most file explorer actions on Sync files and folders. Follow the same procedures you use to perform these actions on other files and folders in file explorer, and they are synced to the FileCloud server. They include:

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

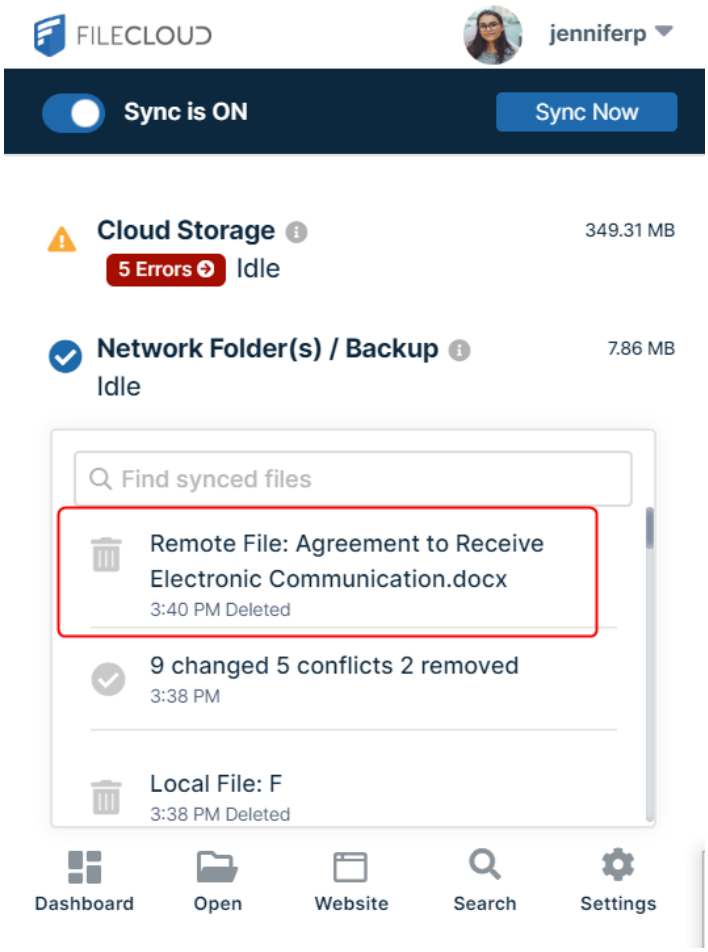
Delete Files and Folders in Sync

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

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



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

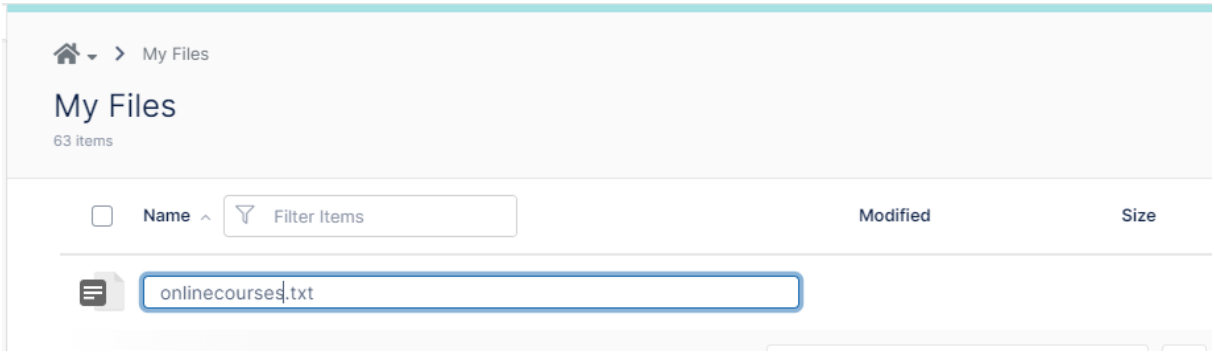


You can also delete the file through the normal process of right-clicking on the file or folder within the Sync folders and choosing **Delete**.

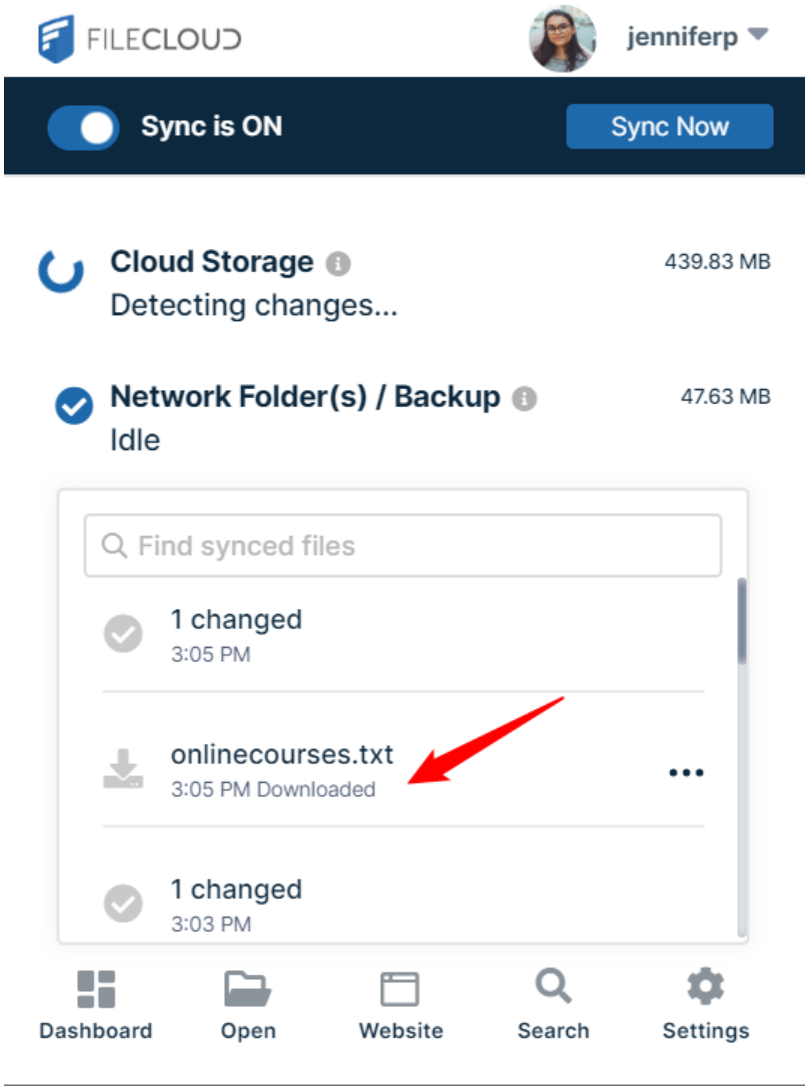
Download a File in Sync

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

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



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

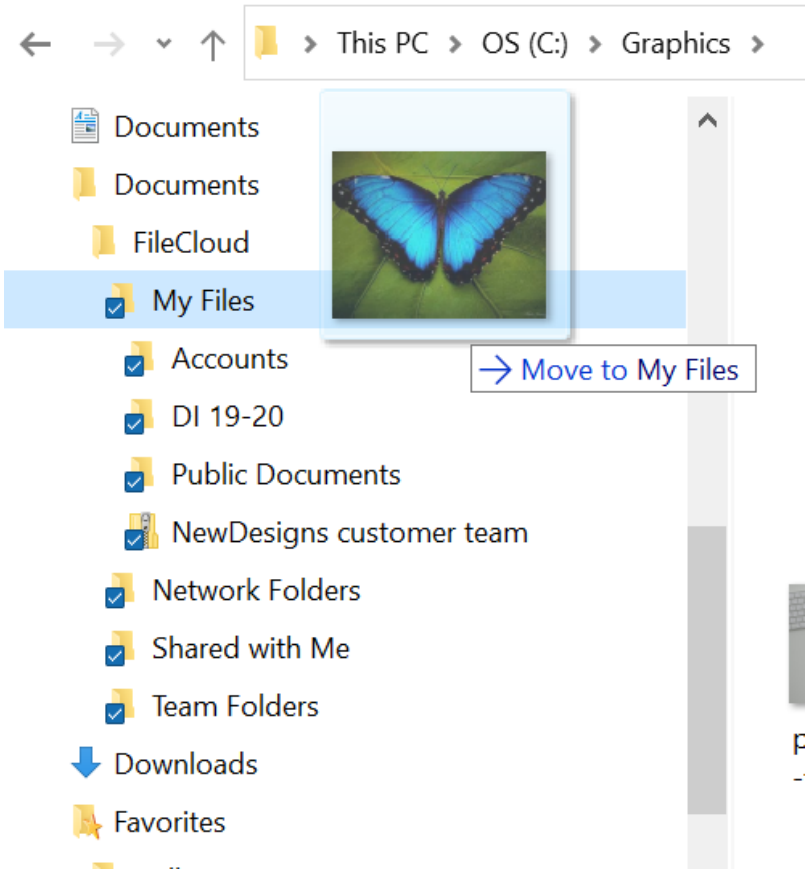


Upload a File in Sync

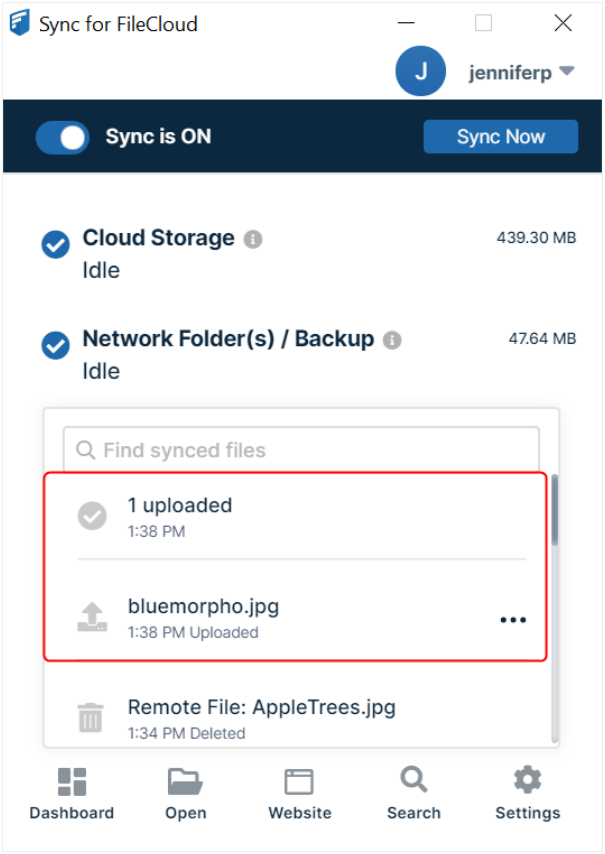
How to upload files in Sync

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

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



When FileCloud syncs, the action appears as an upload:



Restrictions on filenames and file extensions

Please note the following restrictions when uploading files to FileCloud:

- Files with the same name:
  - If you upload a file with the same name and the same case as another file in the same folder, it overwrites the file.
  - If you upload a file with the same name but a different case than another file in the same folder, you cannot upload the file and the File Operations window displays a file name conflict message.
  - If you upload files with the same name but different file extensions, like **myfile.doc** and **myfile.docx**, they are treated as different files.
- FileCloud cannot upload files with leading spaces in the filename.
- By default, files with the extensions **php**, **php5**, **phar**, and **phtml** cannot be uploaded into FileCloud.

For Admins

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

Work with Comments in Sync

You can add comments to a file, or see version information by viewing the properties.

To view properties:

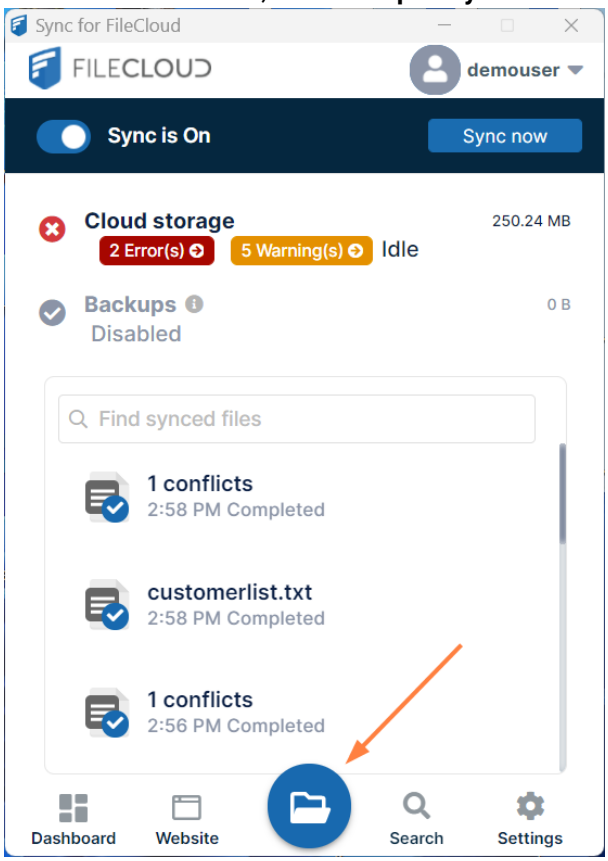
1. Launch FileCloud Sync by right-clicking on the icon in your system tray, and then selecting File Browser.
2. A File Browser window opens, displaying the contents synchronized with FileCloud.
3. Right-click the item you want to view the properties for, and then select View FileCloud Properties.
4. Use the following instructions to manage File or Folder Comments.

Resolve conflicts in Sync

Resolve a conflict from the Sync directory in file explorer:

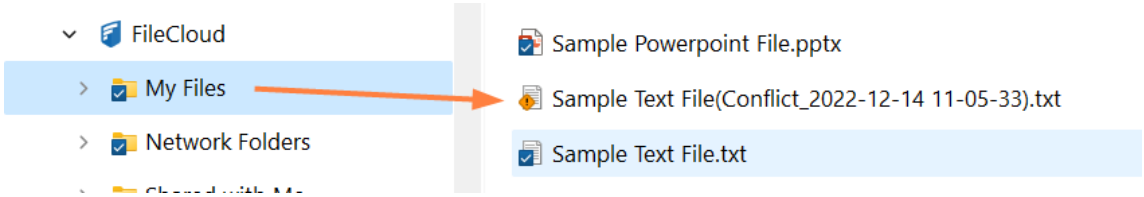
1. In your system tray, right-click on the Sync icon and choose **Open**.

2. In the mini-dashboard, click the **Open Sync Folder** icon.

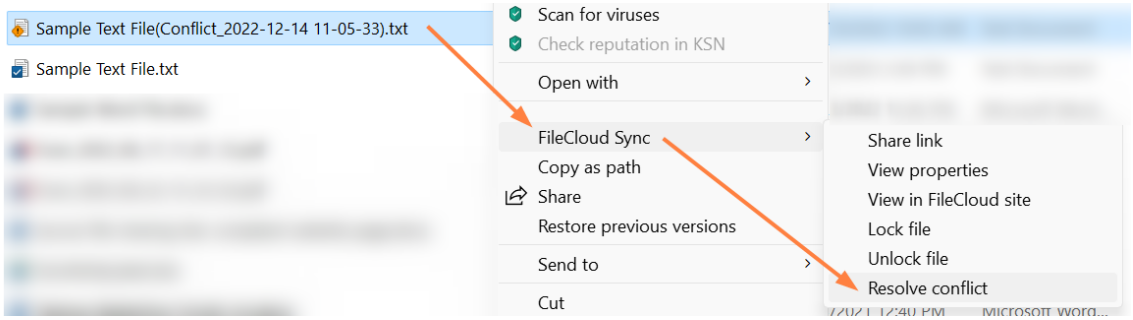


File explorer opens and displays your Sync directory.

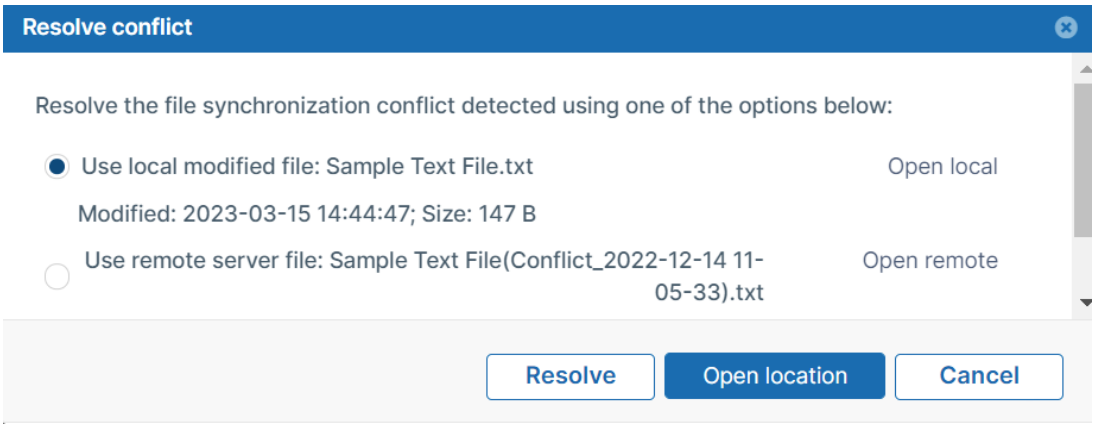
3. Open the folder in your Sync directory that contains the conflict file or folder.
A conflict file has a yellow warning icon over it and a name in conflict format in parentheses. It appears above or below the local version of the file.



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



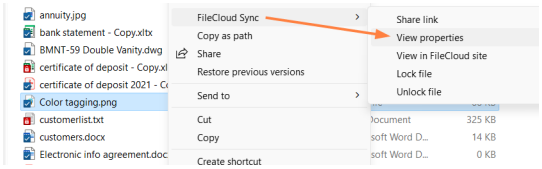
A **Resolve Conflict** dialog box opens.



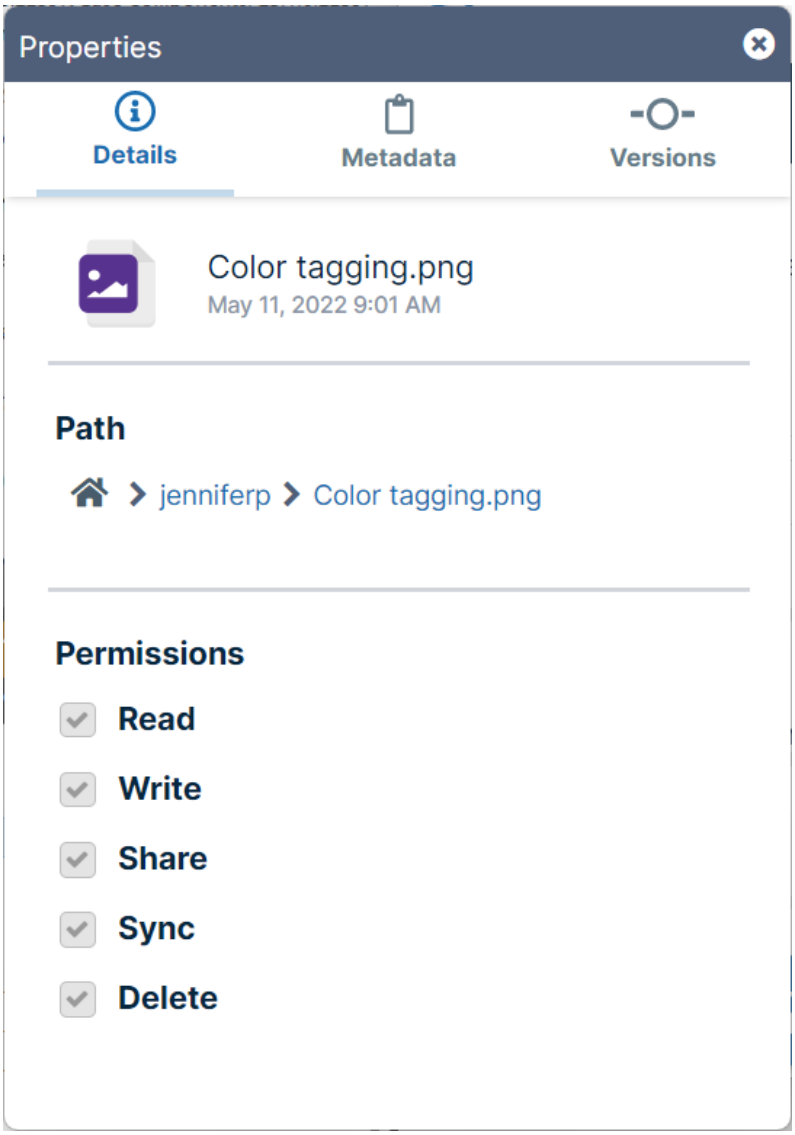
5. If you want to check the content of either file before choosing which copy to save, click **Open local** or **Open remote**.
6. Select **Use local modified file: (filename)** to discard the server file and keep your modified local file.
   or
   select **Use remote server file: (filename)** to discard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

View a file or folder's details in Sync

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

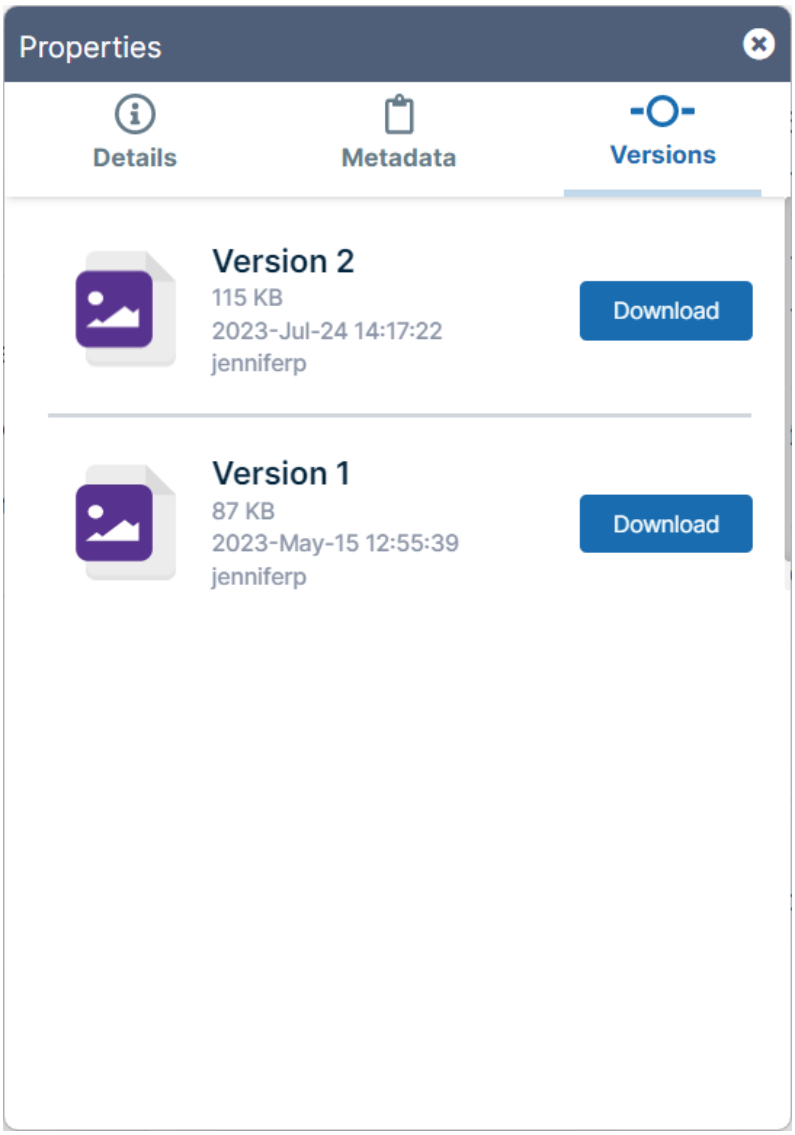


   A **Properties** dialog box opens to the **Details**, **Metadata**, and **Versions** tabs.
5. To view file or folder details, remain on the **Details** tab.



- If you are viewing details of a file, as in the image above, the filename and last modified date are shown at the top of the **Details** tab**.**
- Under **Path** the path of the file or folder is listed.
- Under Permissions, your permissions for the file or folder are listed.

6. To see information about a file's versions, click the **Versions** tab.
   The tab lists details of each version of the file and includes a download arrow beside each version for downloading it.



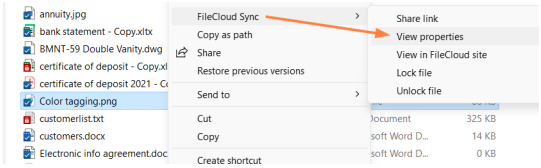
7. To see information about the files metadata, click the **Metadata** tab.
   For information about working in the **Metadata** tab, see Work with Metadata in Sync.

Work with Metadata in Sync

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

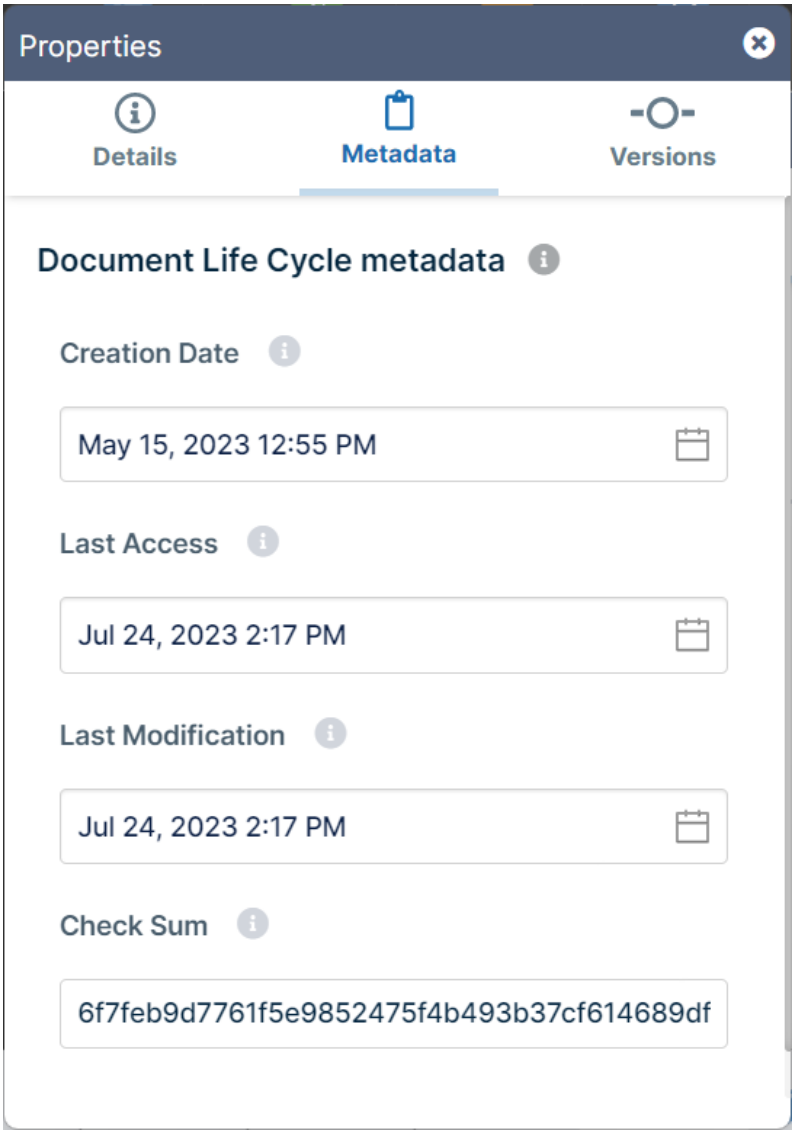
To view or add metadata:

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



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

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

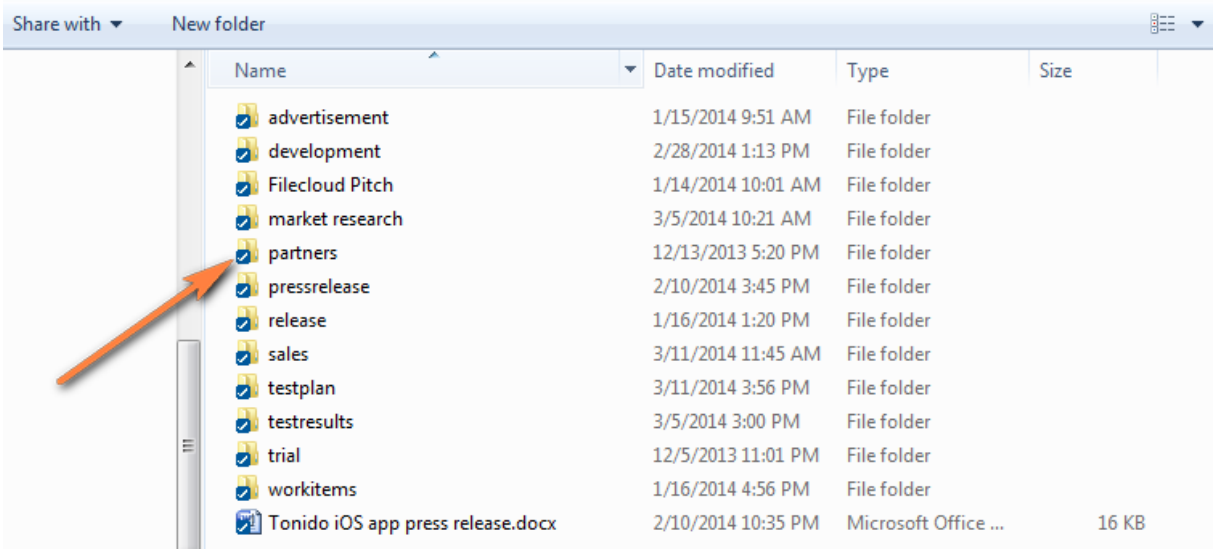


5. View and if you have permission, add or modify metadata values.
   For more information about metadata in FileCloud, see Managing Metadata.

Sync Icon Overlays

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

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



The following icon overlays are currently supported.

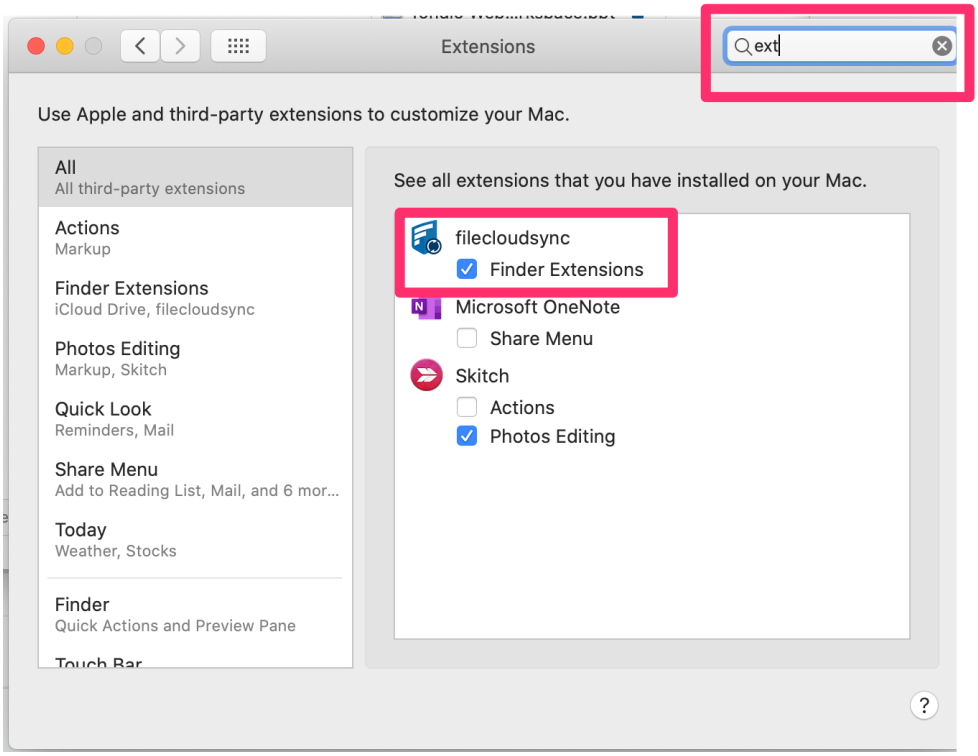
Icon	Status
No Icon	File or Folder is new and has not been synced to the sync server.
	File or Folder has been synced to server and is up to date.
	File has been modified and has not yet been synced to the server.
	File is in conflict because changes have been made both in the server and locally. It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

Mac OSX Finder Right-Click Extension

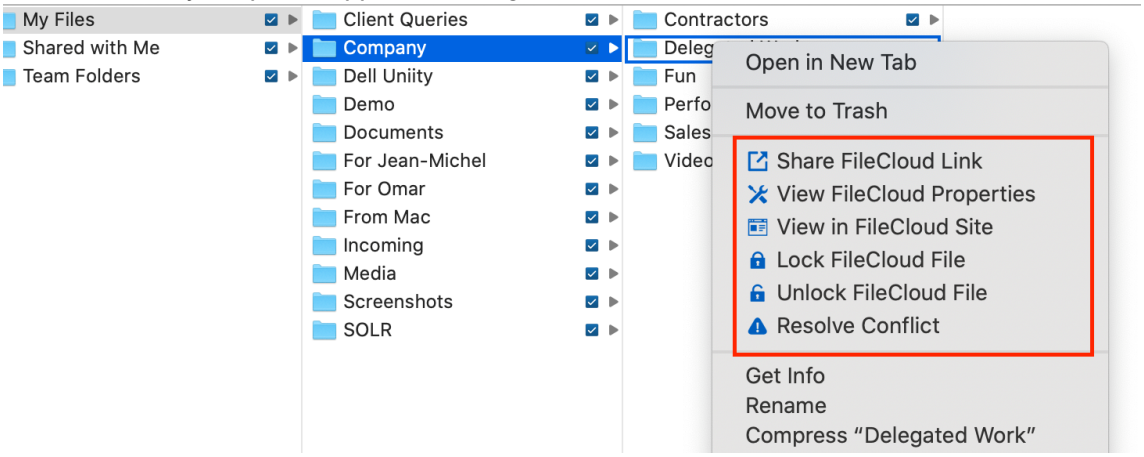
Mac OSX Finder Right-Click Extension

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

1. Open your MacOS settings, and go to **System Preferences > Extensions**.
2. Search on *extensions*, and enable **Finder Extensions** for **filecloudsync**.



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

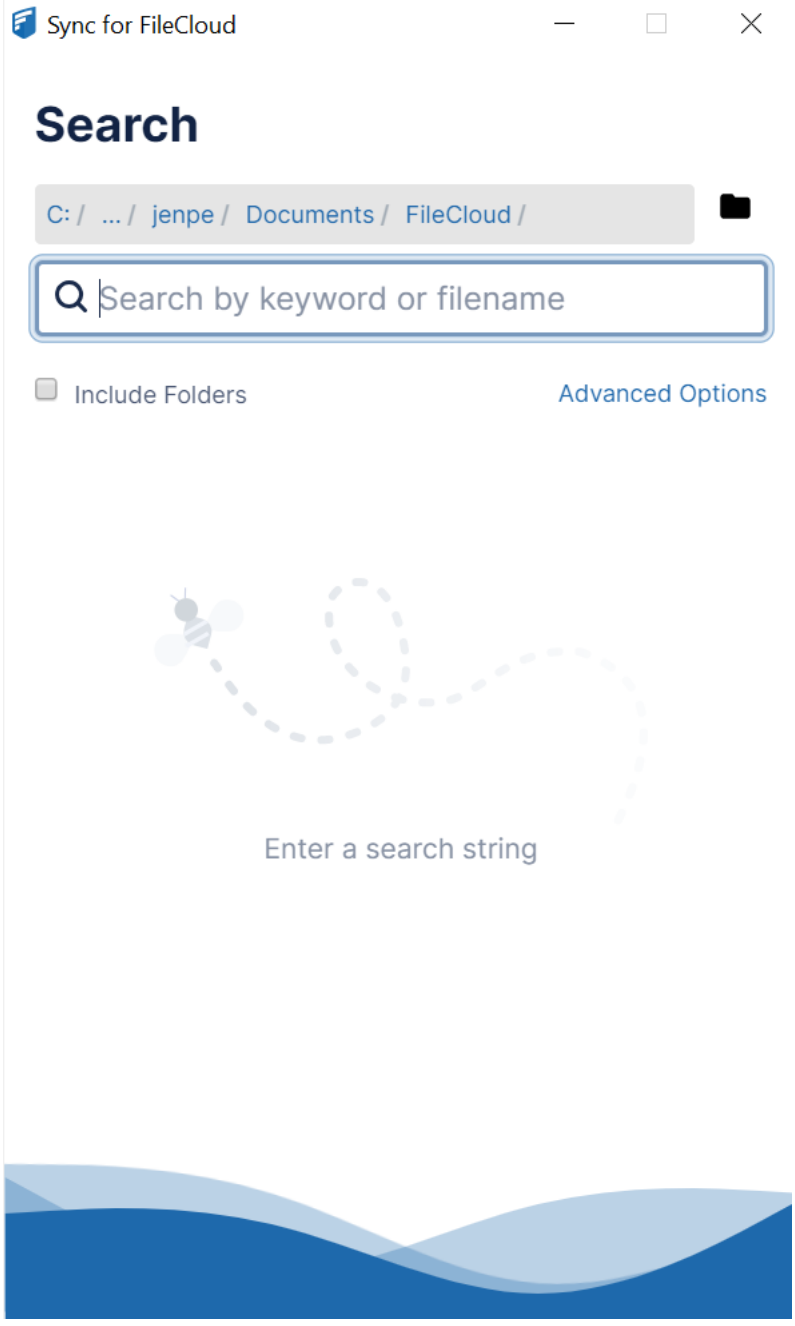


Searching in Sync

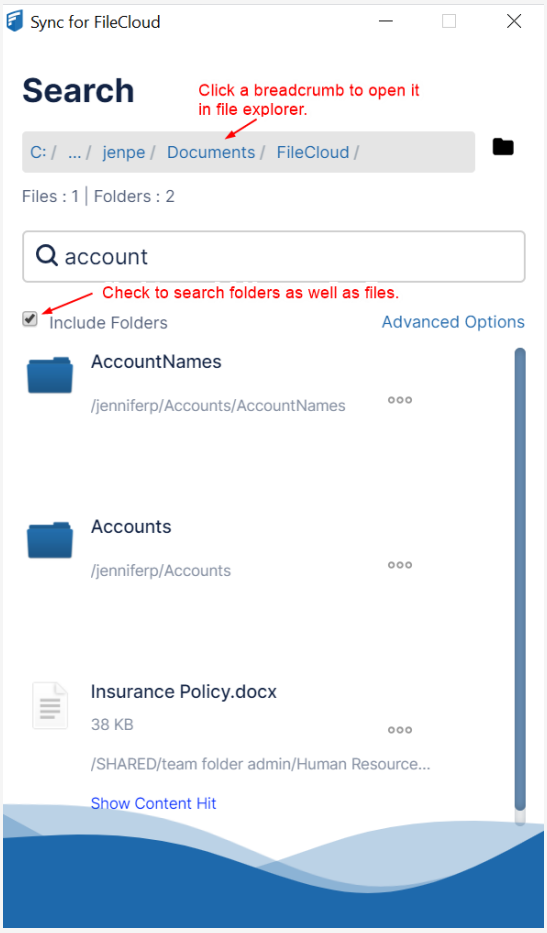
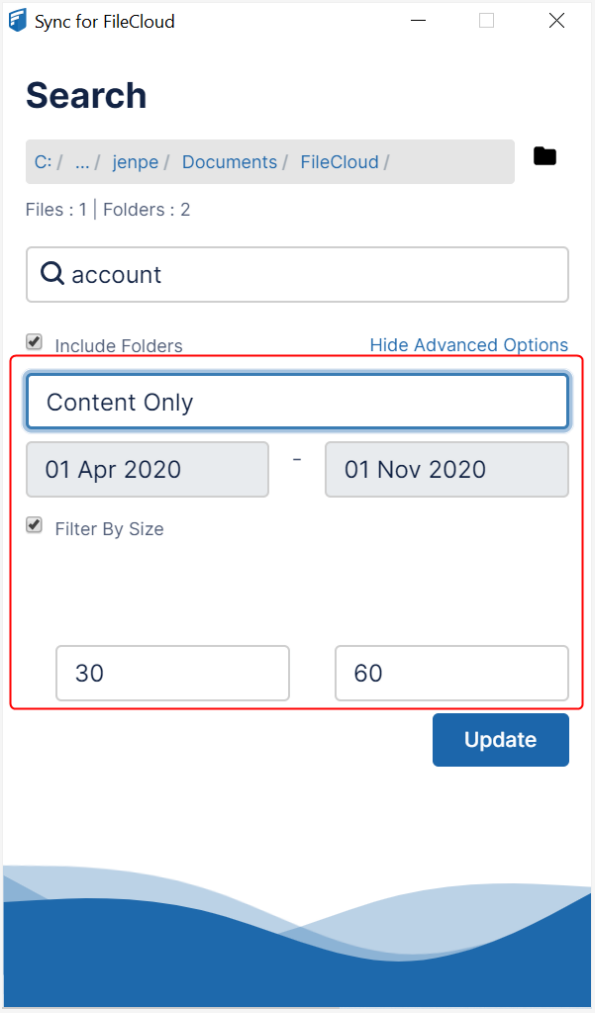
Beginning with FileCloud Version 20.2, users are able to search for files in Sync using the desktop client.

How do I access the search window?

1. In your system tray, right-click on the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Search**.
   The **Search** window opens. The current path is your local Sync folder.



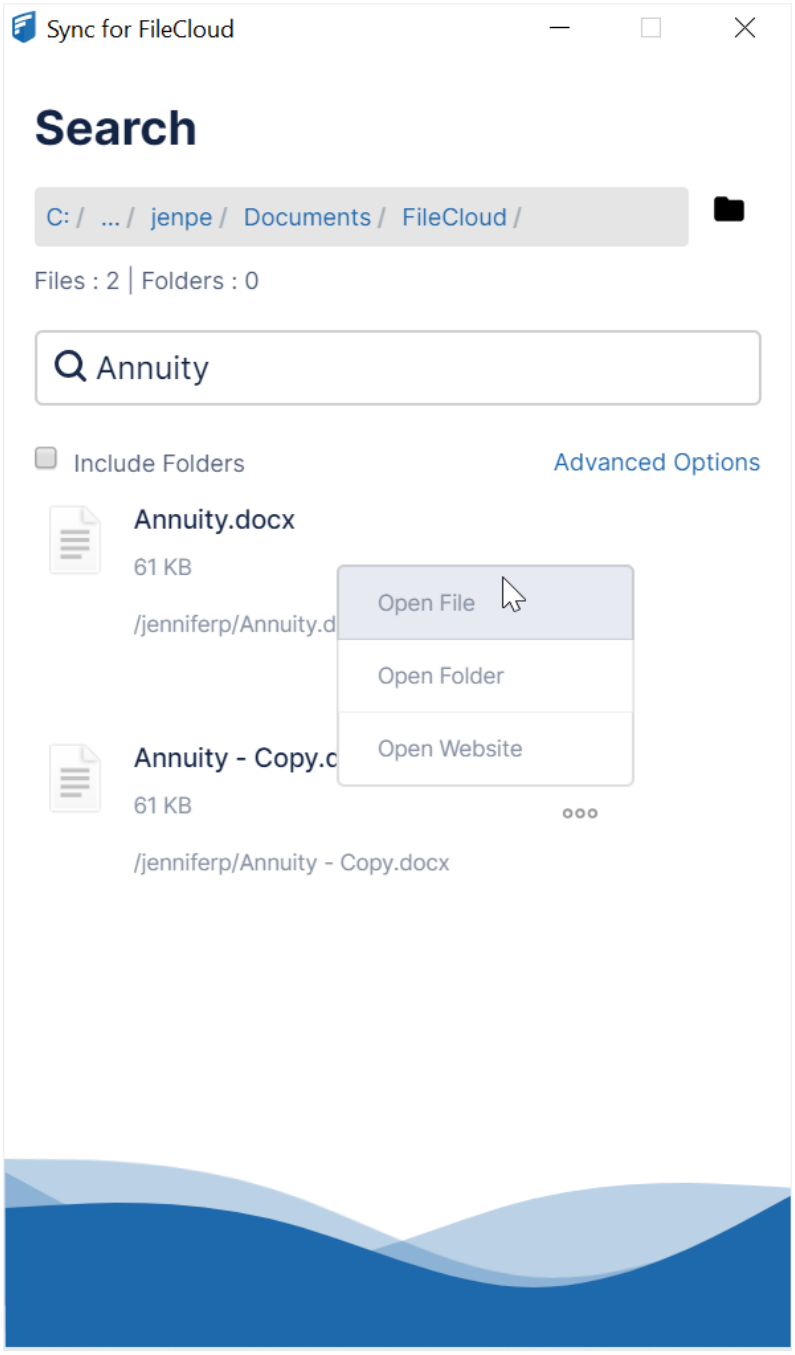
Basic and Advanced Search

Basic search view	Advanced search view
Enter a search term. Searching begins automatically. The files and folders returned are listed in the lower portion of the Search window. Check **Include Folders** to search folder names as well as file names.	Click **Advanced Options** in the Basic search to view the Advanced Options fields. Choose any of the advanced options: • **All**, **Name Only**, **Content Only**,or **Metadata** • Date range • **Filter by size** (check the box, then enter a size range) Click **Update** to begin the search. The results appear in Basic search view.
	

Accessing items after searching

Access a file after searching:

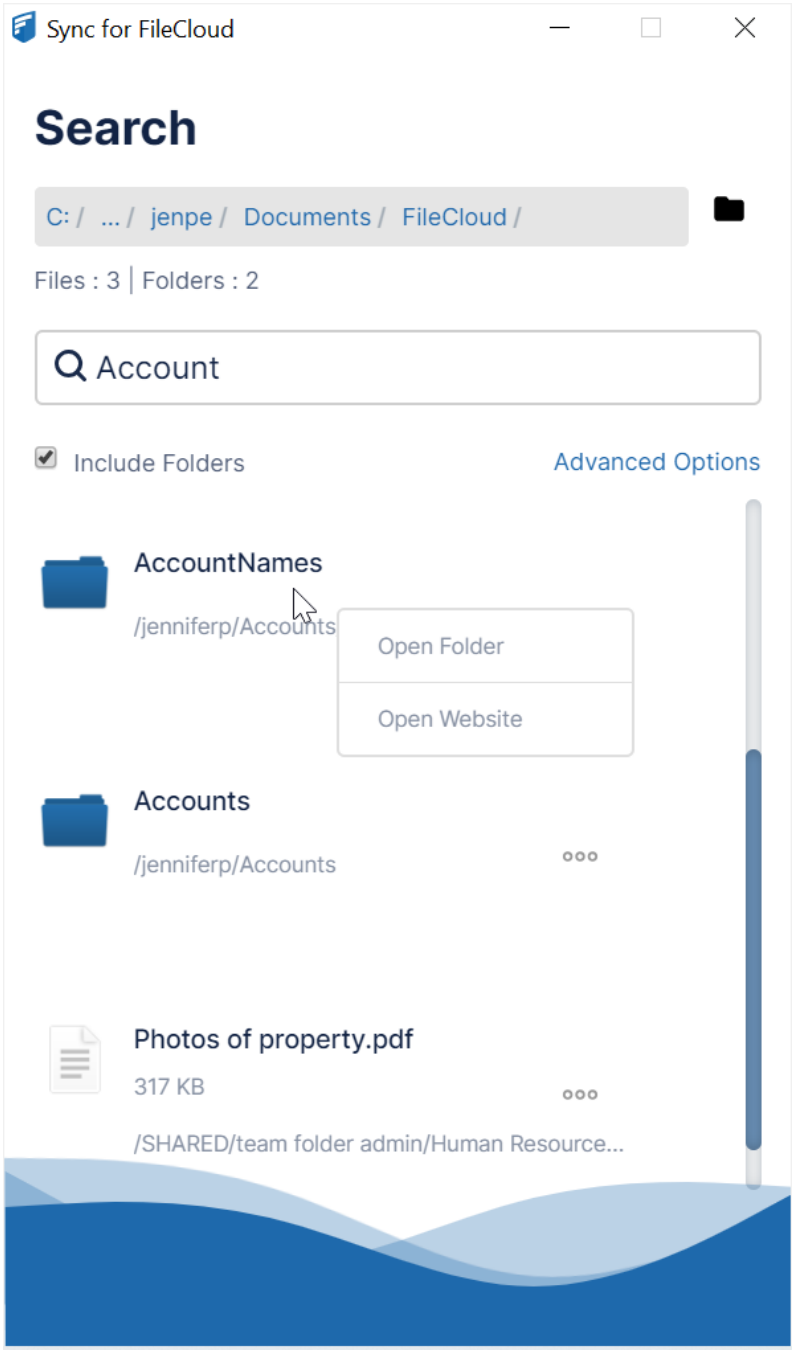
1. In the Search window, right-click the file.



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

Access a folder after searching:

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



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

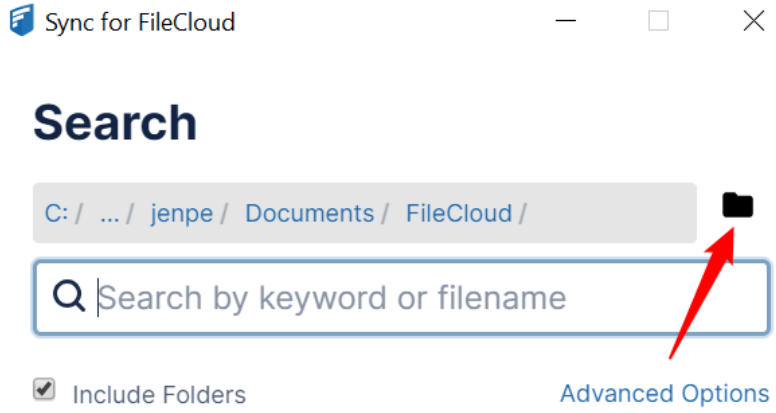
Also see:

Changing the Sync search path

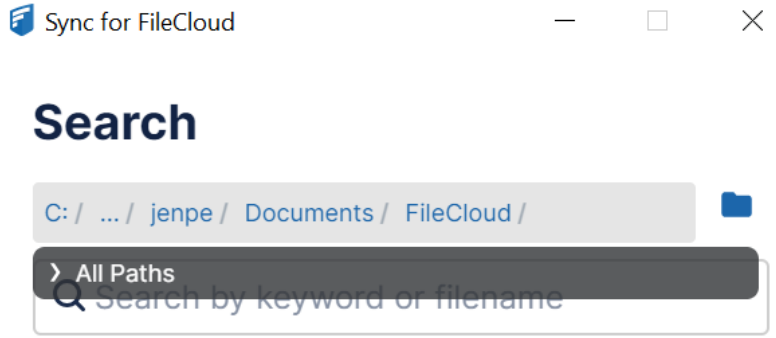
You can change the search path without leaving the Search window.

To change the search path from the Search window:

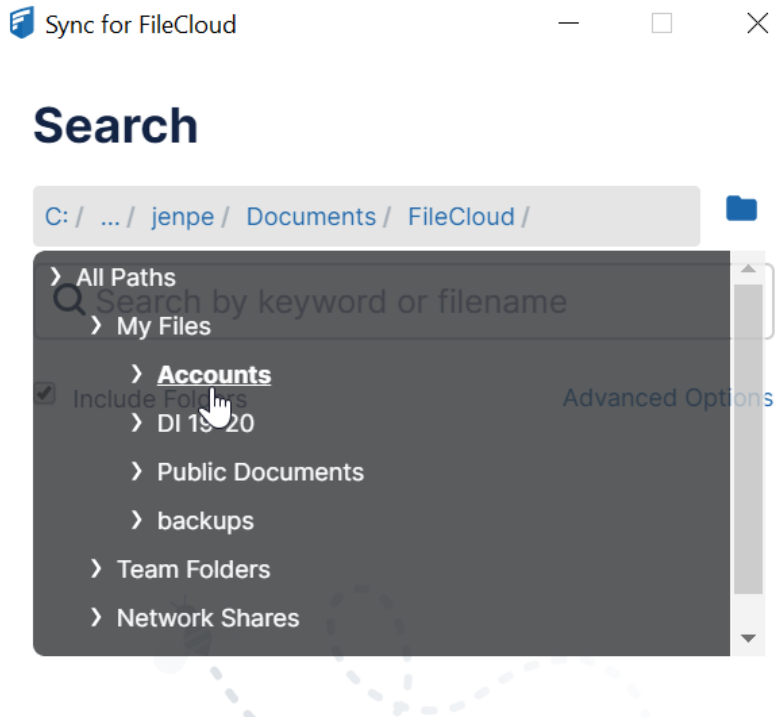
1. Click the folder icon next to the search box.



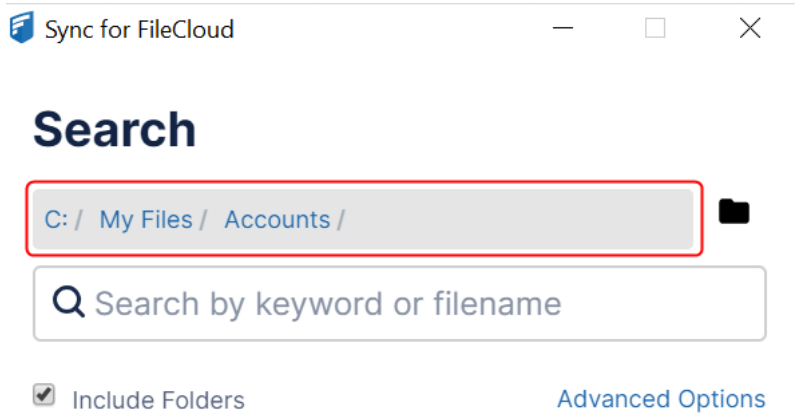
All Paths opens:



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



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



Content Search in Sync

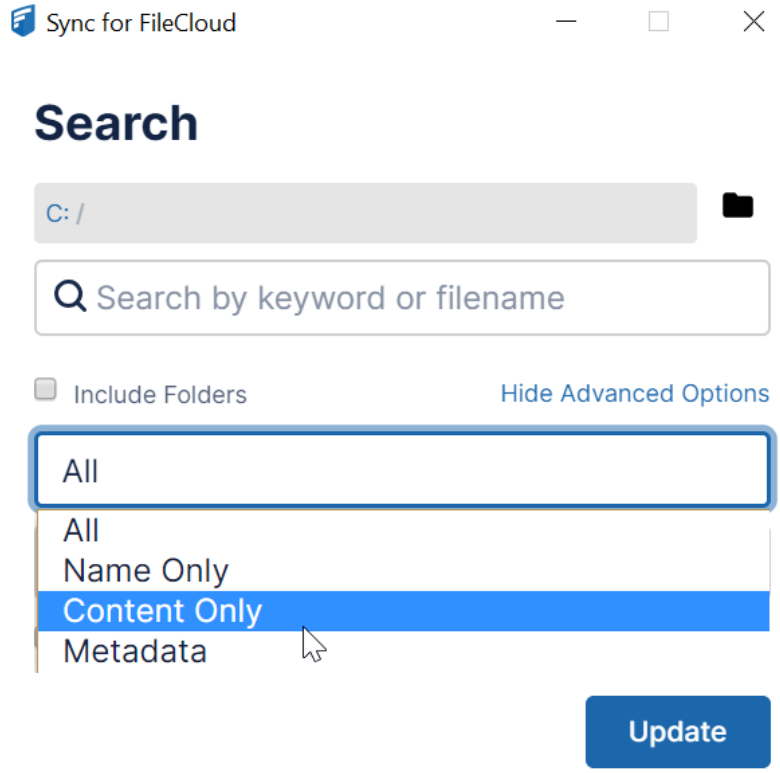
Content search enables you to search through the text in file types such as txt, pdf, doc, docx, xls, xlsx, ppt, and pptx.

Note that your admin must have configured content search in FileCloud for content searches to work.

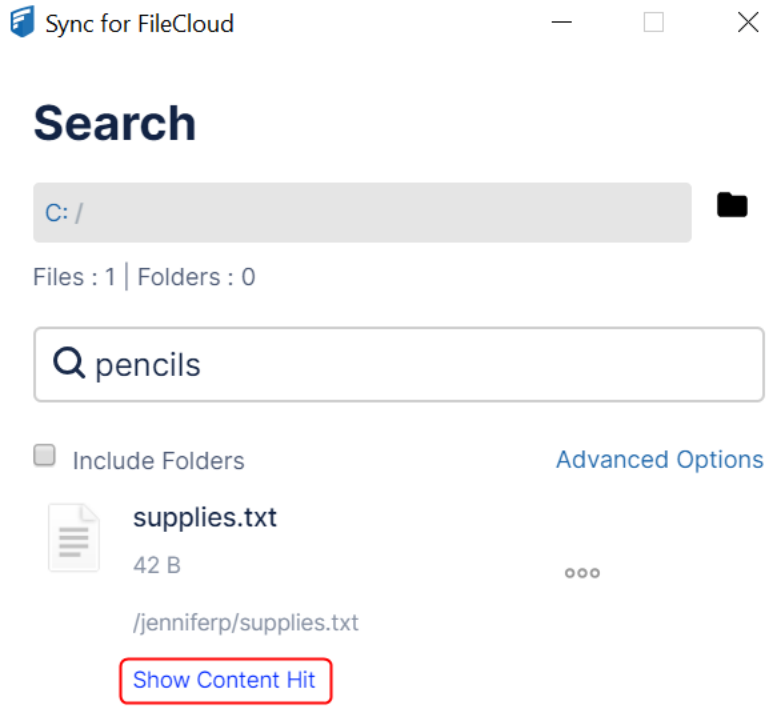
Any files with matches are displayed with the link **Show Content Hit** below them.

To search in content:

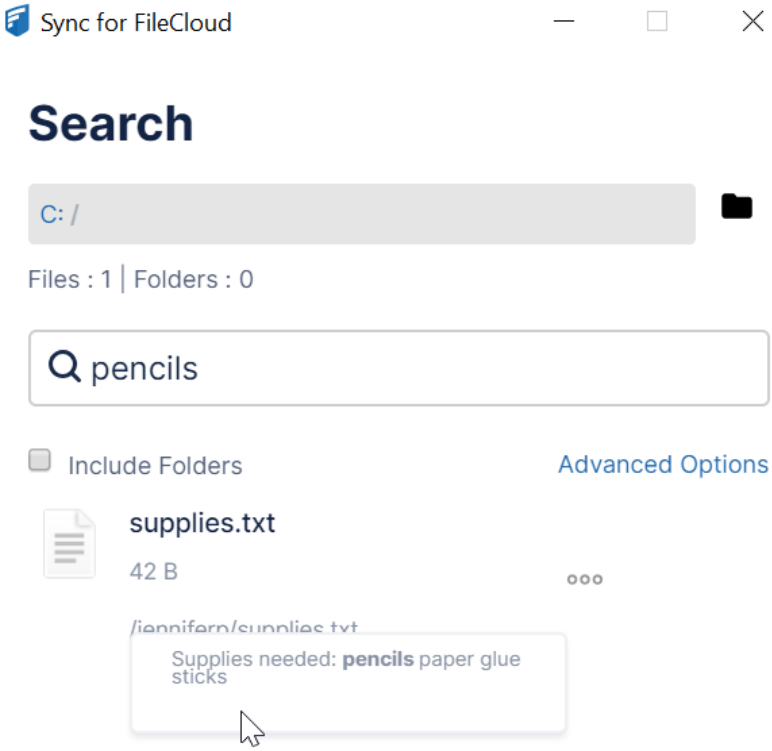
1. Access the Search window in Sync.
2. Click **Advanced Options**.
   Advanced options appear.



3. In the drop-down list, choose **Content Only**.
4. Enter a search term.
5. Click **Update**.
   The Search window displays the results with the link **Show Content Hit** below each result.



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

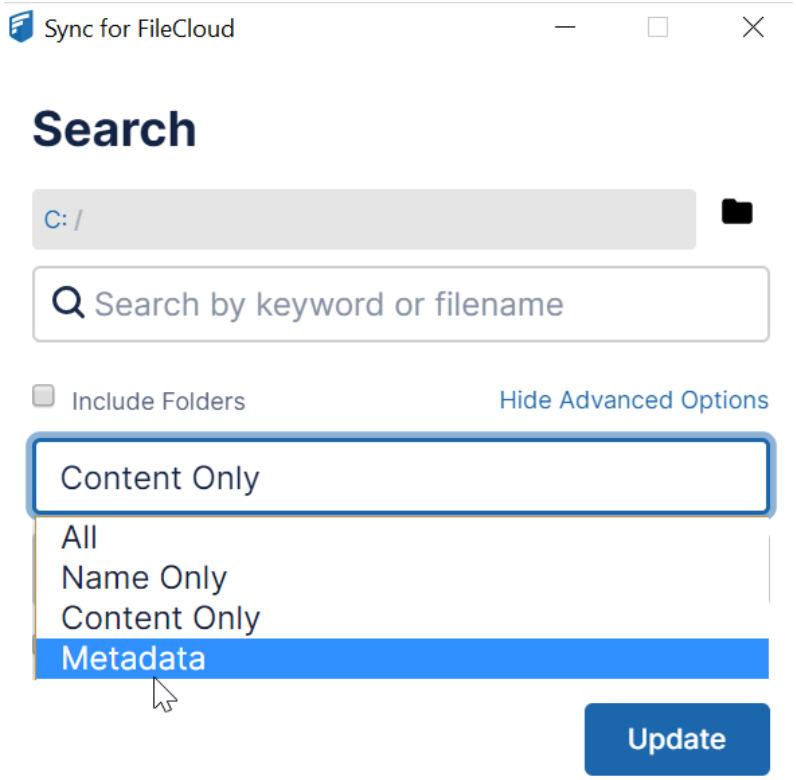


Metadata Search in Sync

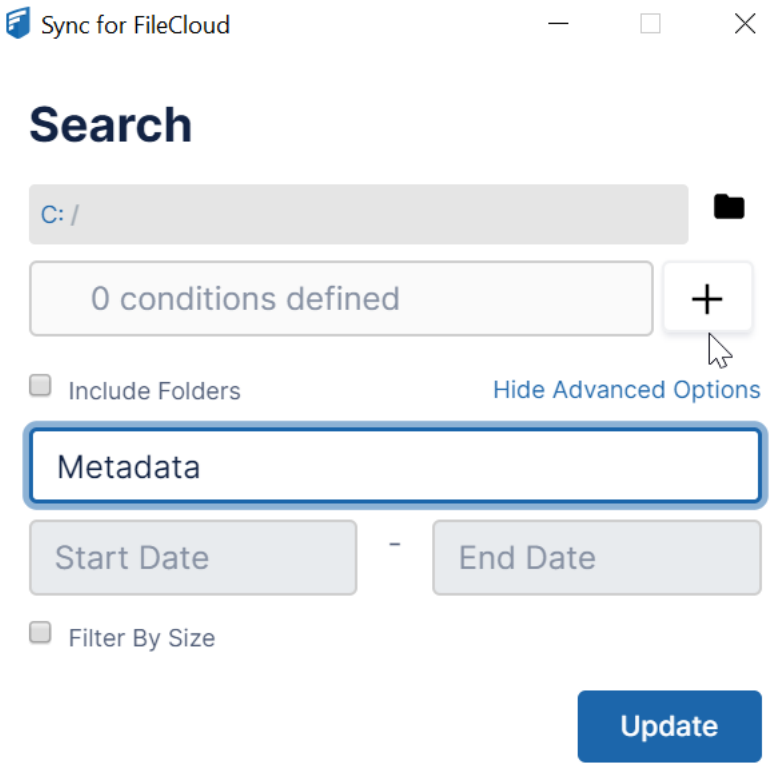
You can search on metadata from any of the metadata sets in Sync.

To search on metadata:

1. Access the Search window in Sync.
2. Click **Advanced Options**.
   Advanced options appear.
3. In the drop-down list, choose **Metadata**.

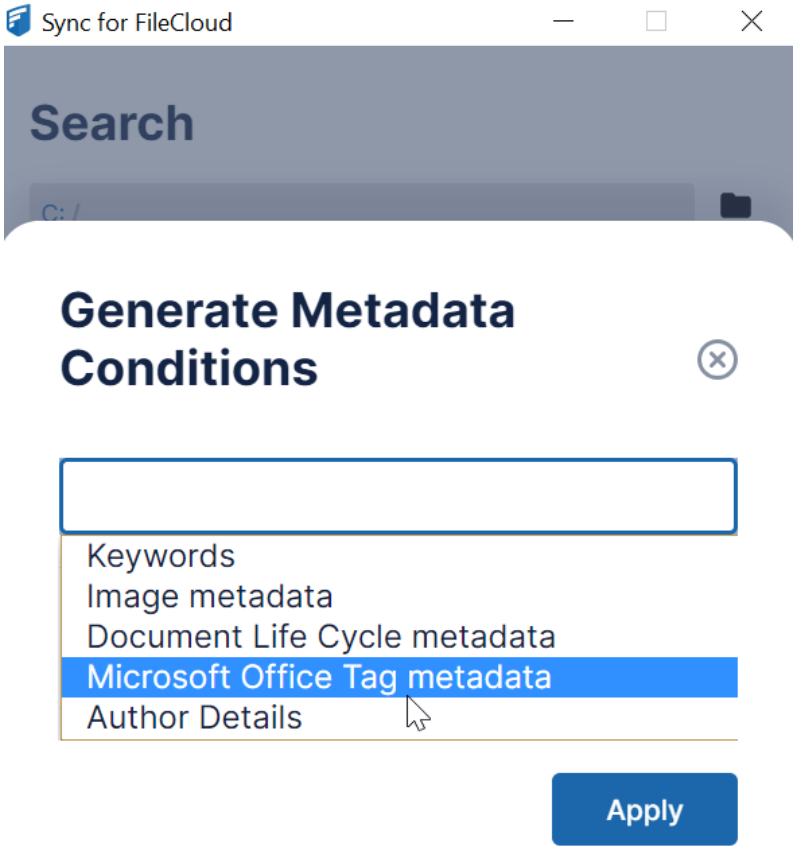


   A **Conditions defined** field appears.
4. To define conditions, click **+** to the right of the field.



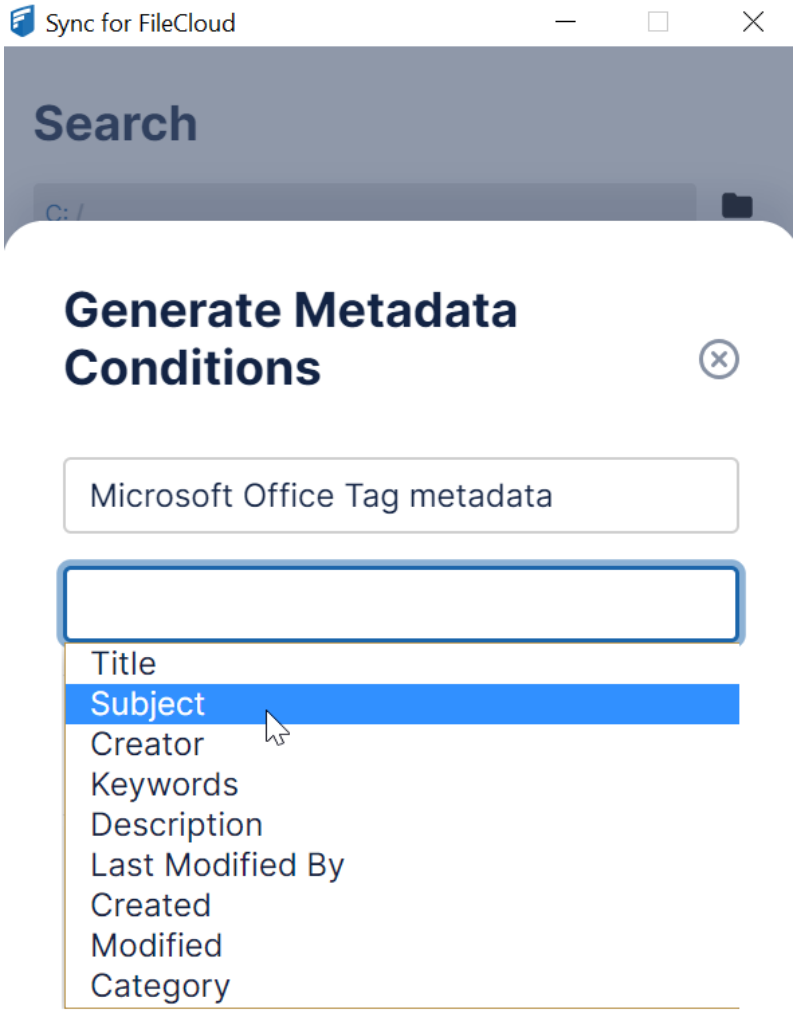
A **Generate Metadata Conditions** window opens. Add search conditions in this window.

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

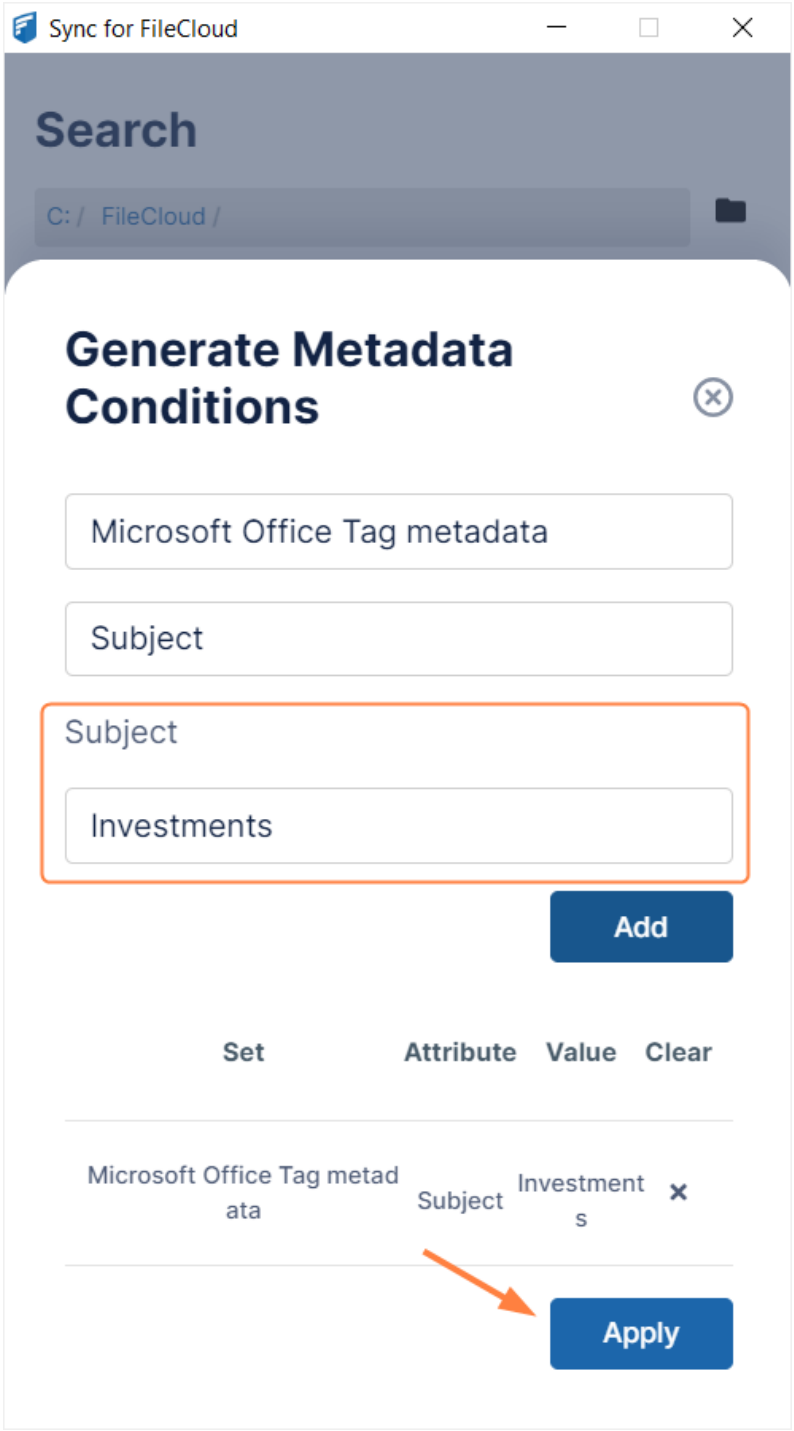


A drop-down list of the metadata type's attributes appears below it.

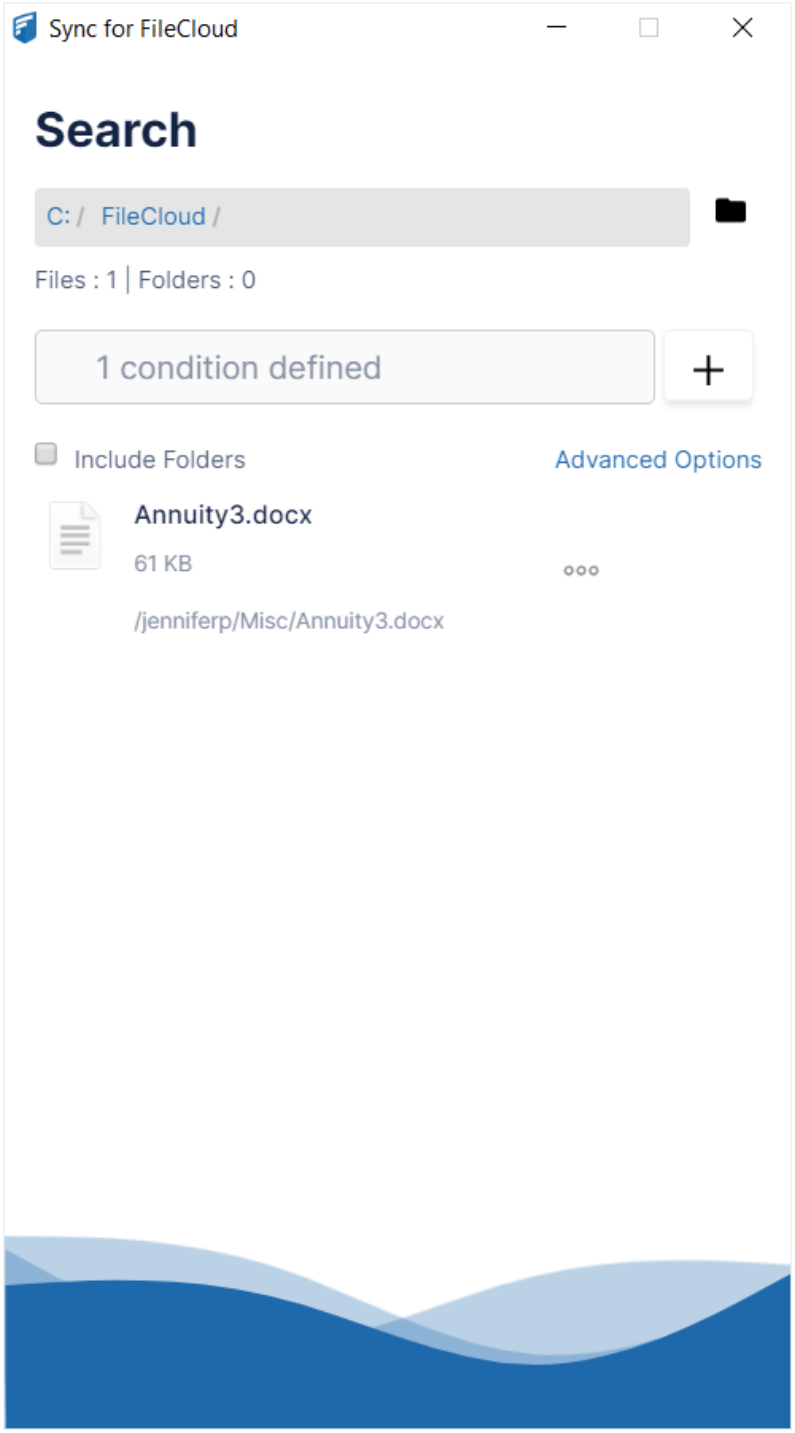
6. Choose an attribute.



A field for the attribute value appears below it.



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

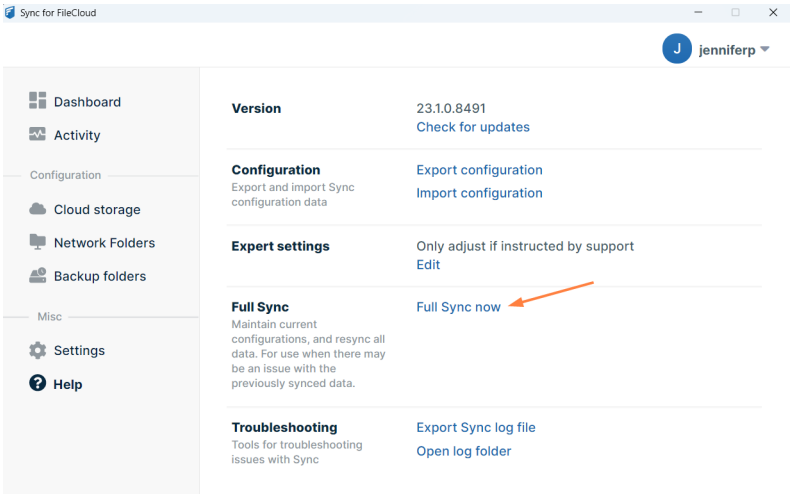

Sync for FileCloud
Search
C: / FileCloud /
Files : 1 | Folders : 0
1 condition defined
Include Folders
Advanced Options
Annuity3.docx
61 KB
/jenniferp/Misc/Annuity3.docx

Refreshing Sync

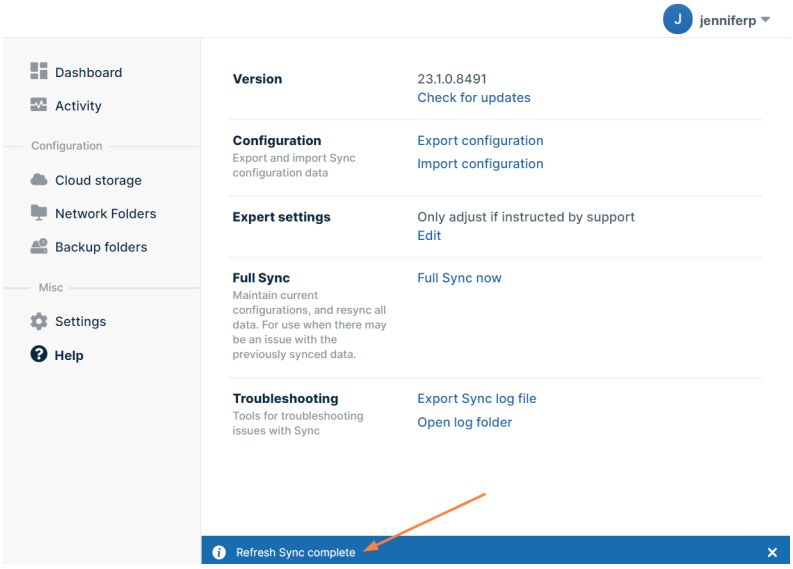
Users can refresh Sync from the Sync dashboard. Admins can refresh Sync for a particular user or users from the Device Management screen by entering a command.

For users: Refresh Sync from the dashboard

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



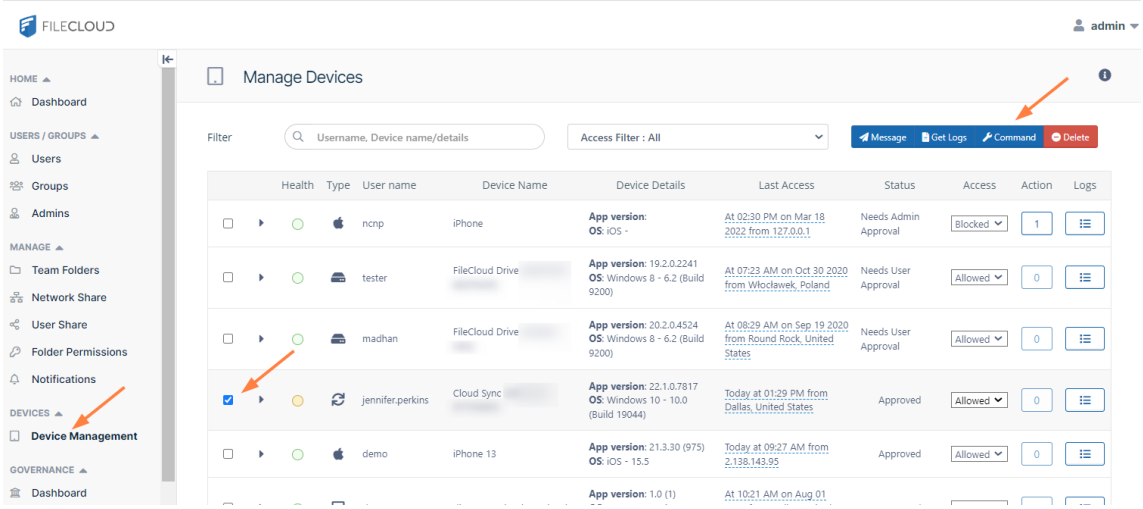
Files and folders are immediately re-synced.
Refresh Sync Complete appears at the bottom of the dashboard.



For admins: Refresh Sync from the admin portal

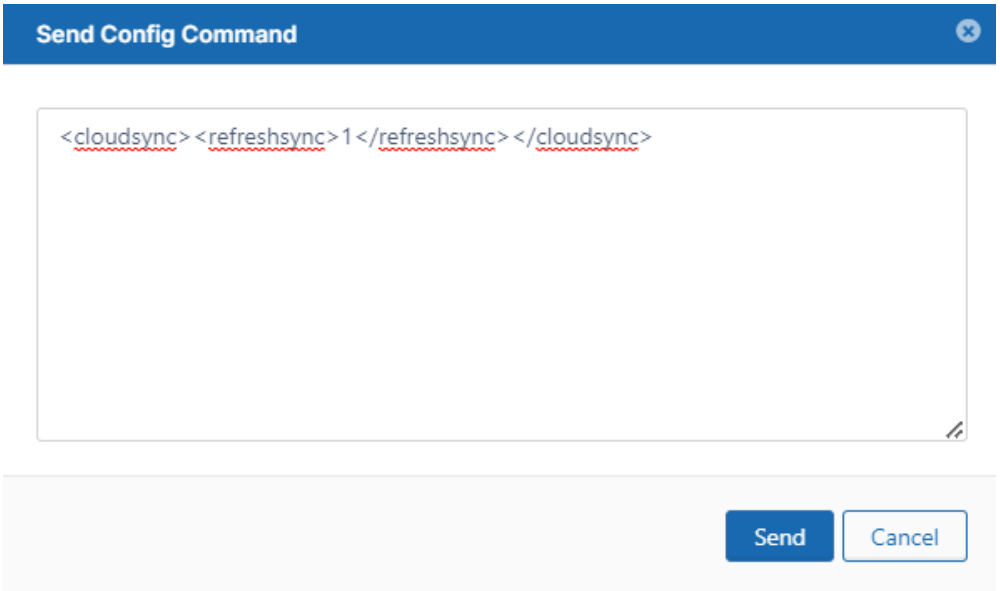
> This command only works correctly when run in the **Manage Devices** screen, as shown in this procedure. Do not use it by entering it into the **Device Configuration** tab of a policy, as this will cause the command to run and refresh Sync every 5 minutes.

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



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

4. Enter the following xml:
<cloudsync><refreshsync>1</refreshsync></cloudsync>



5. Click **Send.**

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

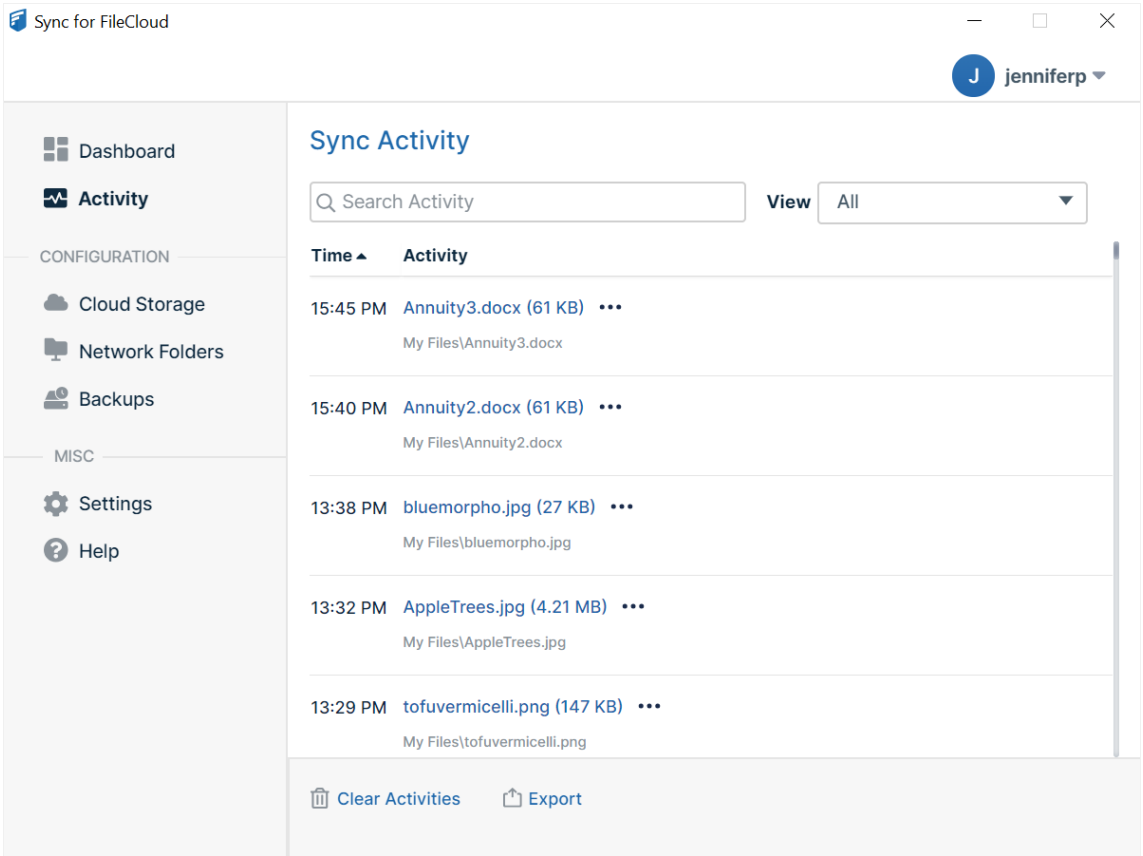
Note: Clicking Sync Now in the main dashboard or mini dashboard, performs an immediate sync of any changes so you don't have to wait for the automatic sync to run. It neither clears your Sync database nor clears your Sync configuration.

View or Clear Log Messages in Sync

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

To view log messages:

1. In your system tray, right-click the Sync icon and choose **Open**.
2. In the mini-dashboard, click **Dashboard**.
3. In the navigation pane of the dashboard, click **Activity**.
   The **Sync Activity** page opens. By default, **View** is set to **All**, and all Sync activities are listed.



4. To view only certain types of log files, choose from the options in the **View** drop-down list.
   The full list of options in the **View** drop-down list is:
   - All
   - Uploaded
   - Downloaded
   - Errors - You can resolve errors in this view. See Resolve conflicts in Sync.
   - Skipped (All)
   - Skipped (My Files)
   - Skipped (Network Folders)
   - Skipped (Backup Folders)
   - Skipped (Root Folder)
     Note: For more information about skipped files, see Reviewing Skipped Files.

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

To export activities:

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

To clear the log file:

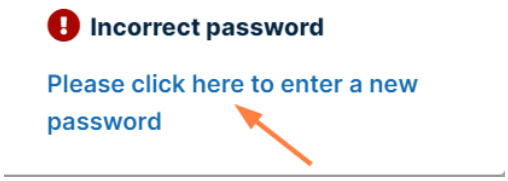
1. On the **Activity** screen, click **Clear Activities**.
   This clears all entries from the log, not just the entries for the current view.

Updating a Changed Password in Sync

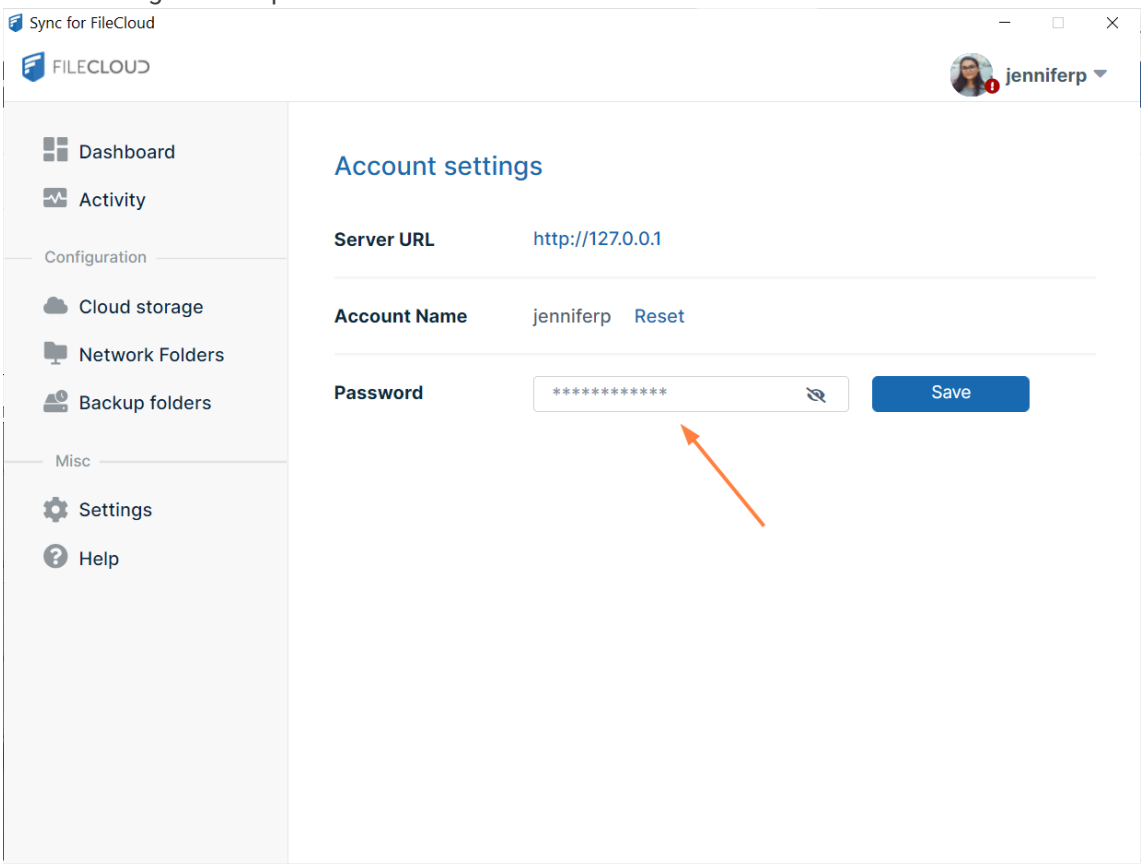
If your password is updated outside of Sync while you are working in Sync, a message tells you that you must enter the changed password.

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

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



The following screen opens:



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

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

Using FileCloud for Office with Sync

> FileCloud for Office is an MS Office add-in for Word, Excel, and PowerPoint which can be used in both Windows and macOS with FileCloud Sync, FileCloud Drive, and FileCloud Desktop. It is available in FileCloud beginning with version 23.1.
> For instructions on how to install FileCloud for Office, see Using FileCloud for Office.
> If you have been using FileCloud Sync with DocIQ, see the instructions for previous users of DocIQ at the bottom of this page.

Before using FileCloud for Office with Sync

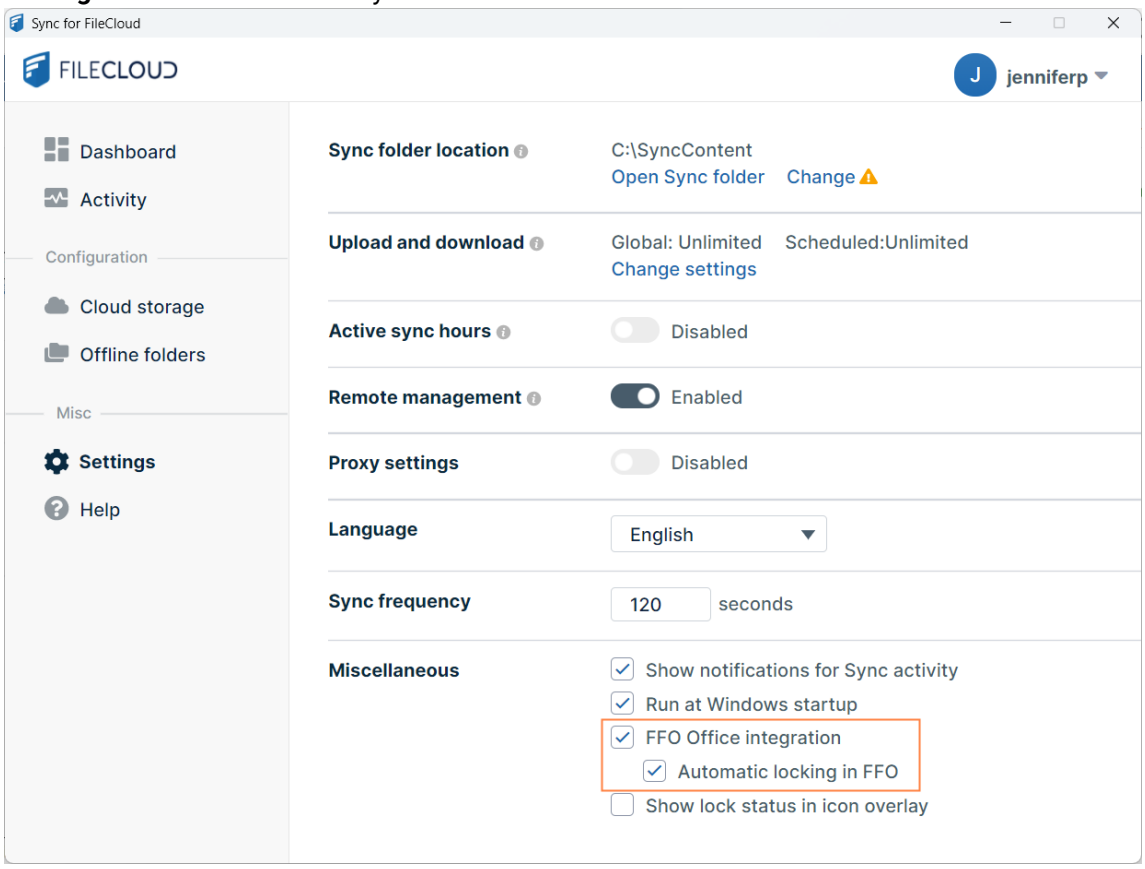
The first time you install Sync or upgrade Sync to use FileCloud for Office you must:

- Confirm that you trust FileCloud for Office and enable it as shown in the following procedure.

To confirm that you trust FileCloud for Office:

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

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



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

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

Working with FileCloud for Office in Sync

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

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

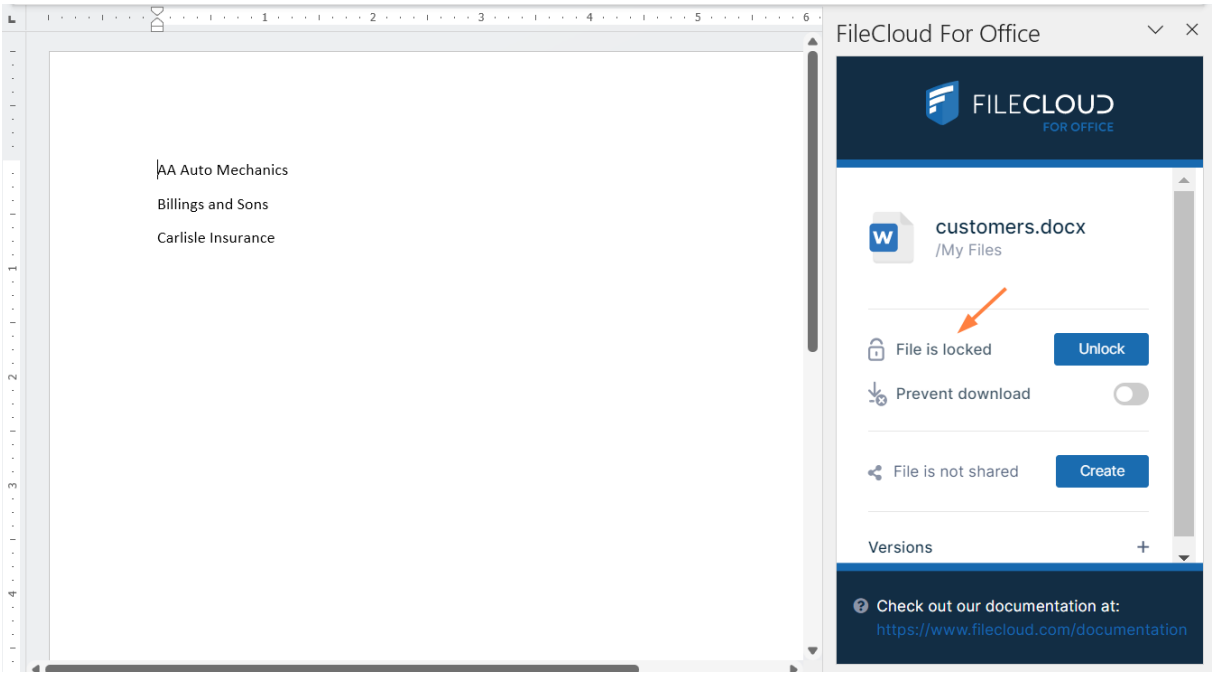
Lock or unlock a file

Locking and unlocking files

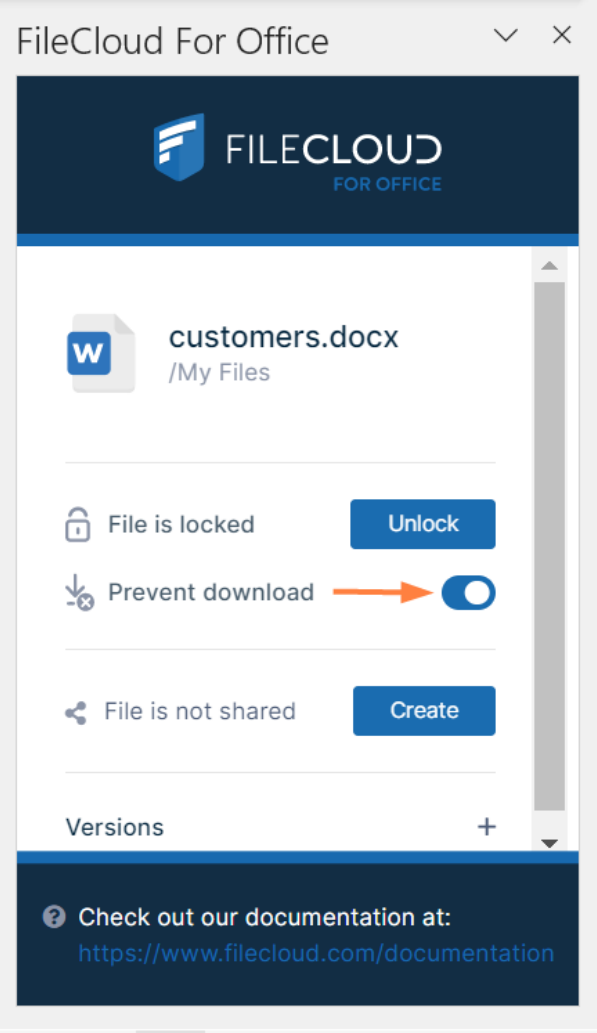
You can use the file locking function in FileCloud for Office to:

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

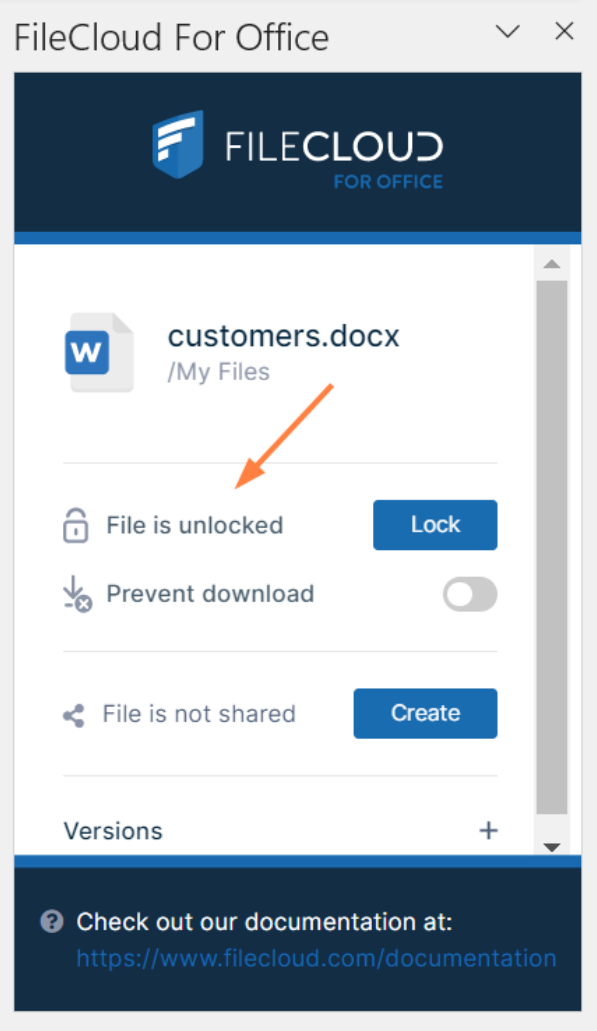
If a shared file is not locked when you open it for edit, another user can also open the file and make changes.
To avoid this, by default, FileCloud for Office automatically locks files for editing when they are opened.
When you open an Office file in your client directory, the FileCloud for Office panel shows **File is locked**, and by default, users are allowed to download or read the file (**Prevent download** is disabled).



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



- To unlock the file while you have it opened for edit, click **Unlock**. Now other users can modify as well as view and download the file.
  Note: Prevent download cannot be enabled when the file is unlocked.



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

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

For a locked file with download (read) prevented:
If USER1 has locked (and read blocked) the file:

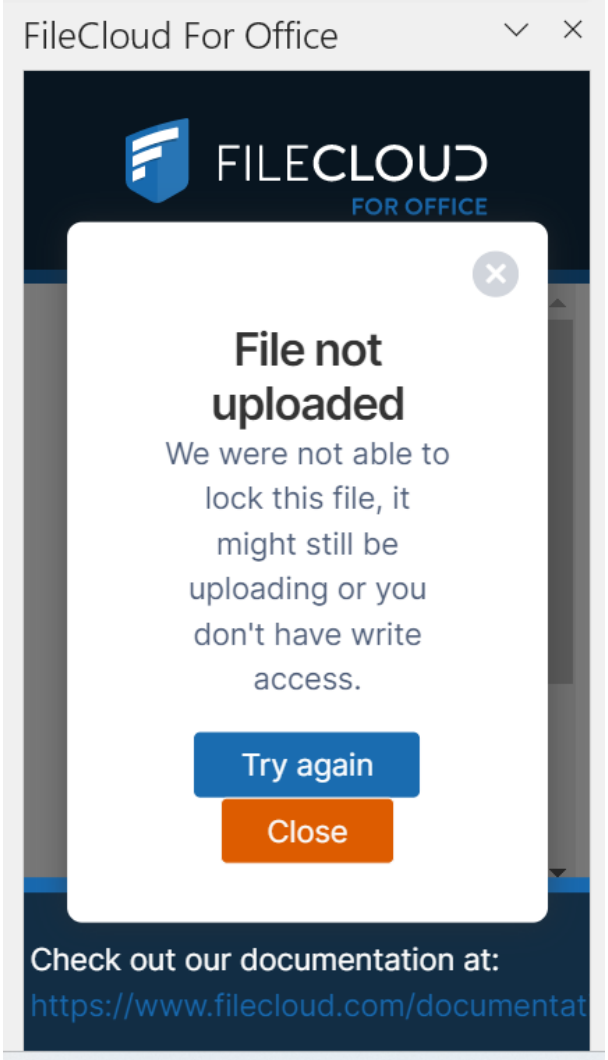
- The FileCloud client will not download the file for USER2

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

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

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

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



If you are an admin and want to disable locking, see Managing User Locks.

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

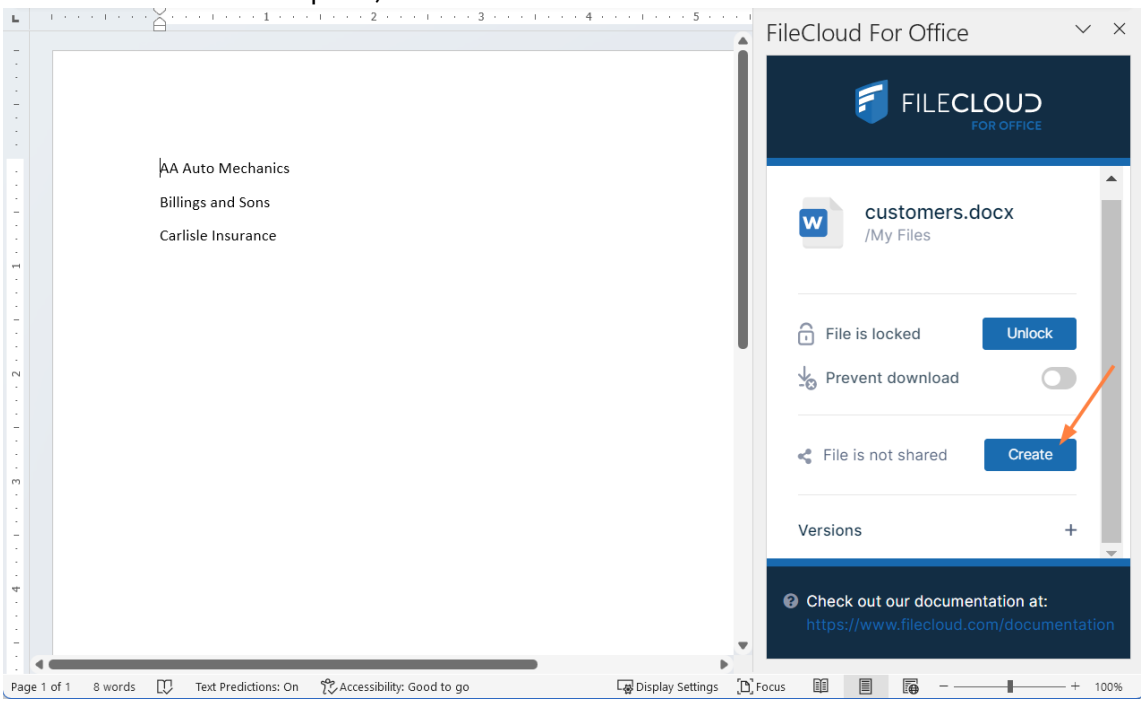
Action	Doc IQ Lock Enabled	Prevent Download	Lock Status Before Open	Lock Status After Open	Lock Status After close
An unlocked file is opened by USER1	☑	☒	File is not locked	File is locked (read allowed) by USER1	File is not locked
An unlocked file is opened by USER1	☒	☒	File is not locked	File is not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

Share a file

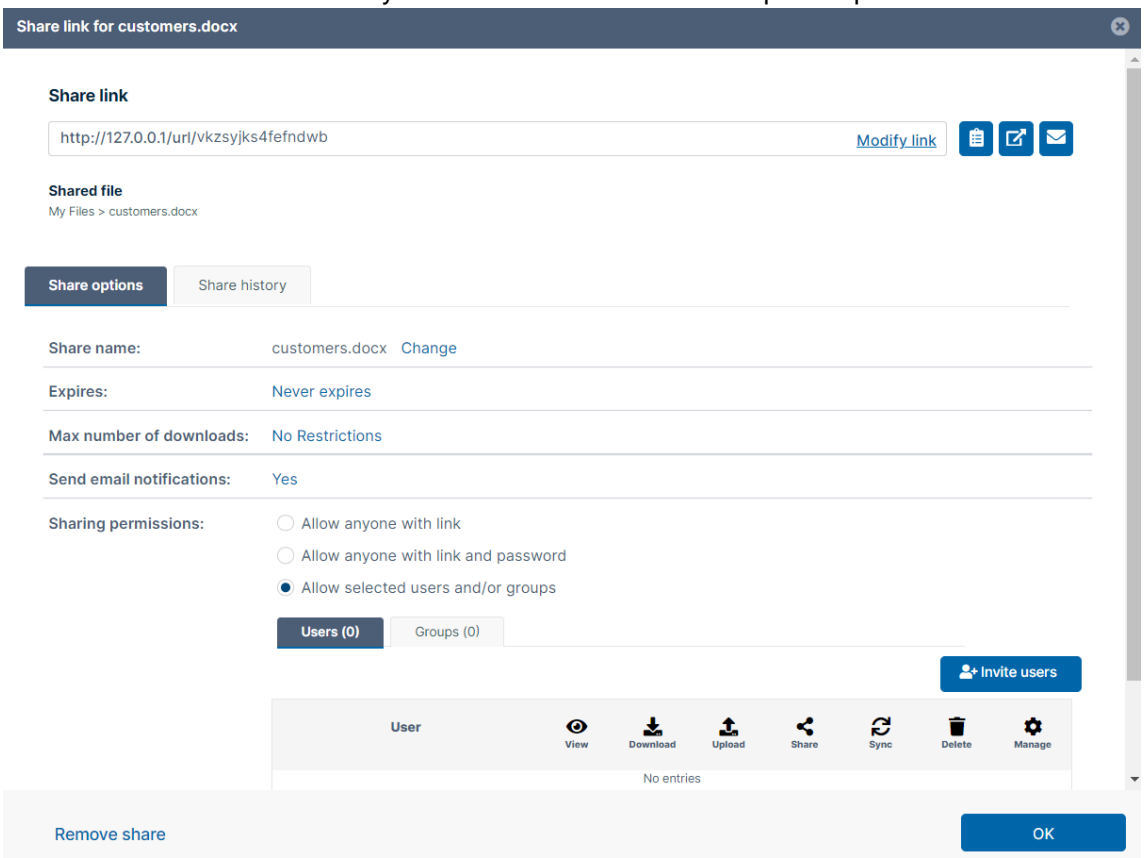
Sharing a file

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

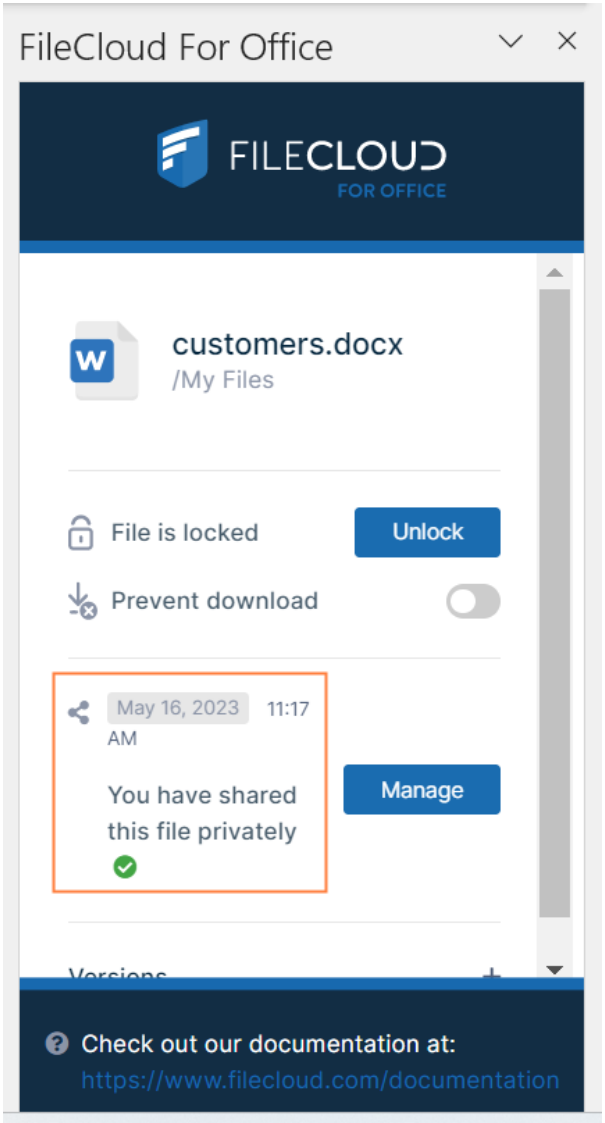
1. In the FileCloud for Office panel, click **Create**.



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



2. Share the file using the same settings and options that you would for a share in the user portal. See Sharing Files and Folders for help.
   Note: The option for downloading the share QR code, which is available for shares created from the user portal, is not available for shares created in FileCloud for Office.
   After you have shared the file, the FileCloud for Office panel displays details of the share:



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

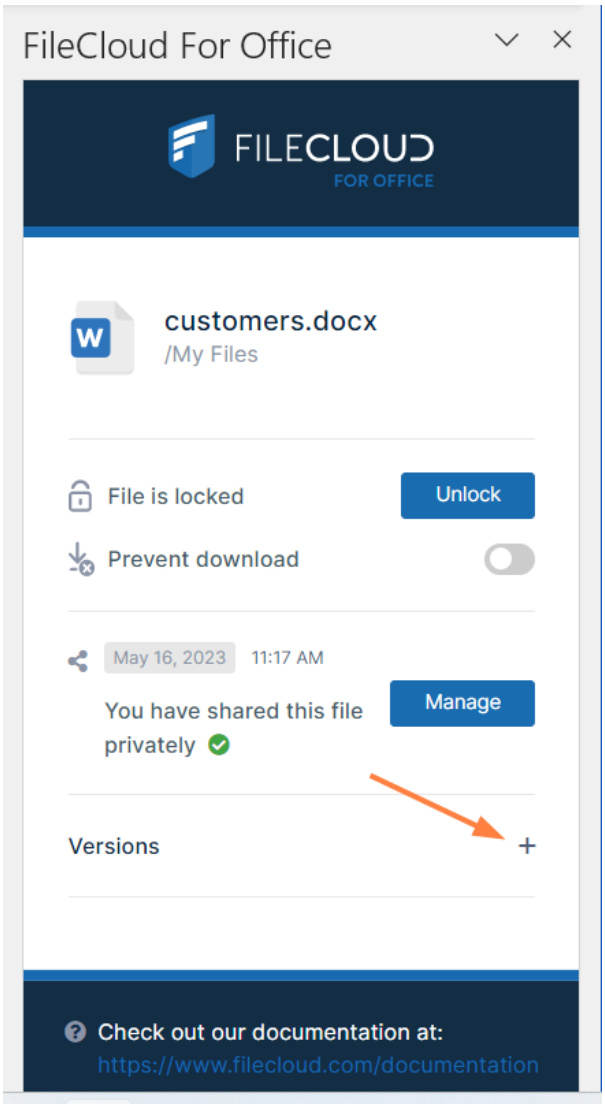
Download versions, view details and metadata

Downloading versions, viewing details, viewing metadata

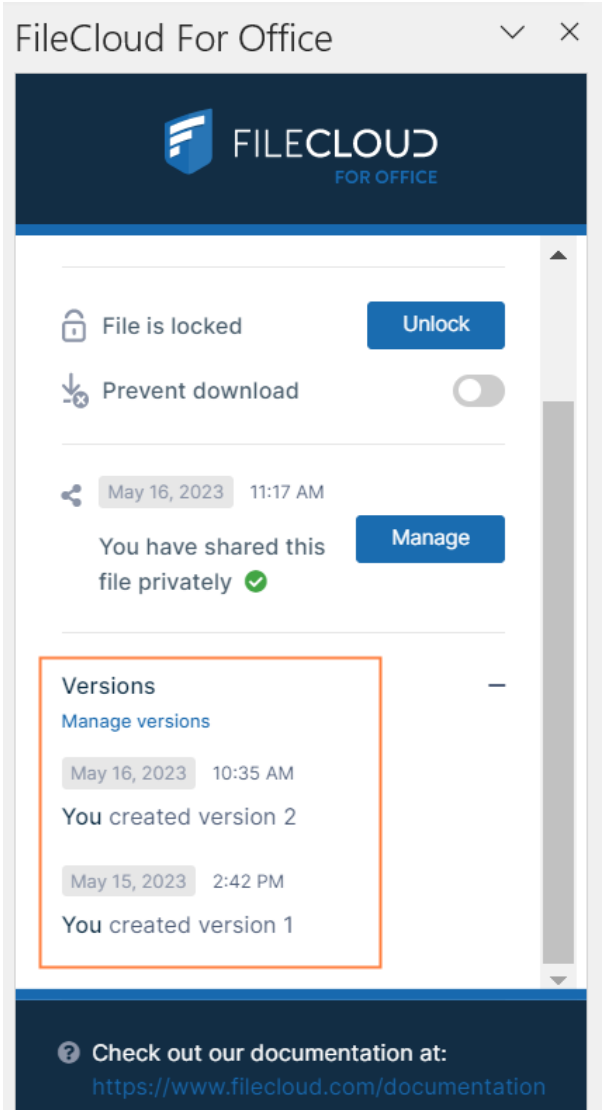
Versions

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

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

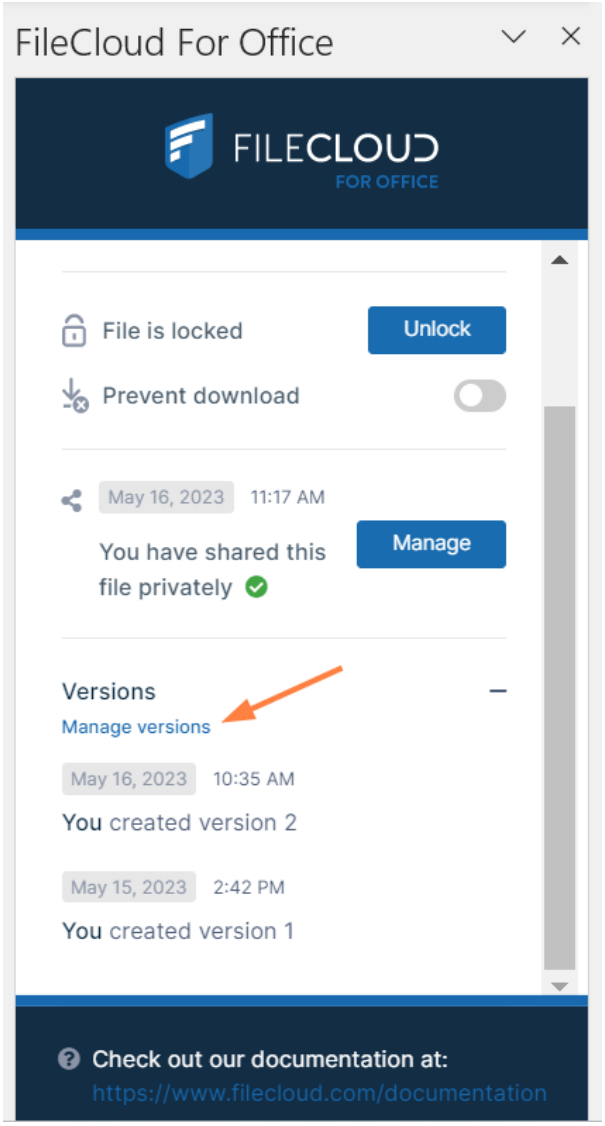


The expanded **Versions** section shows you version information about the file.

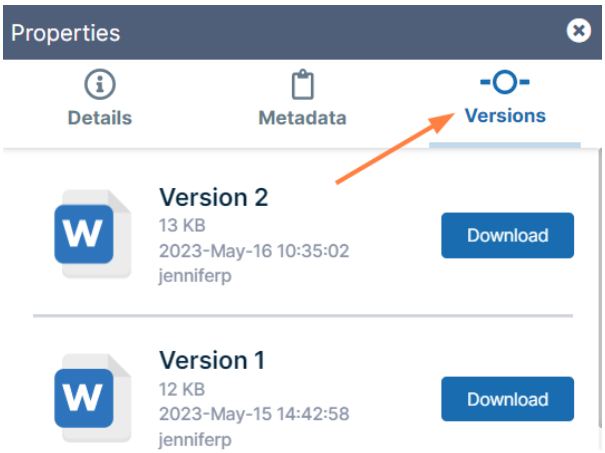


To download file versions in FileCloud for Office:

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



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

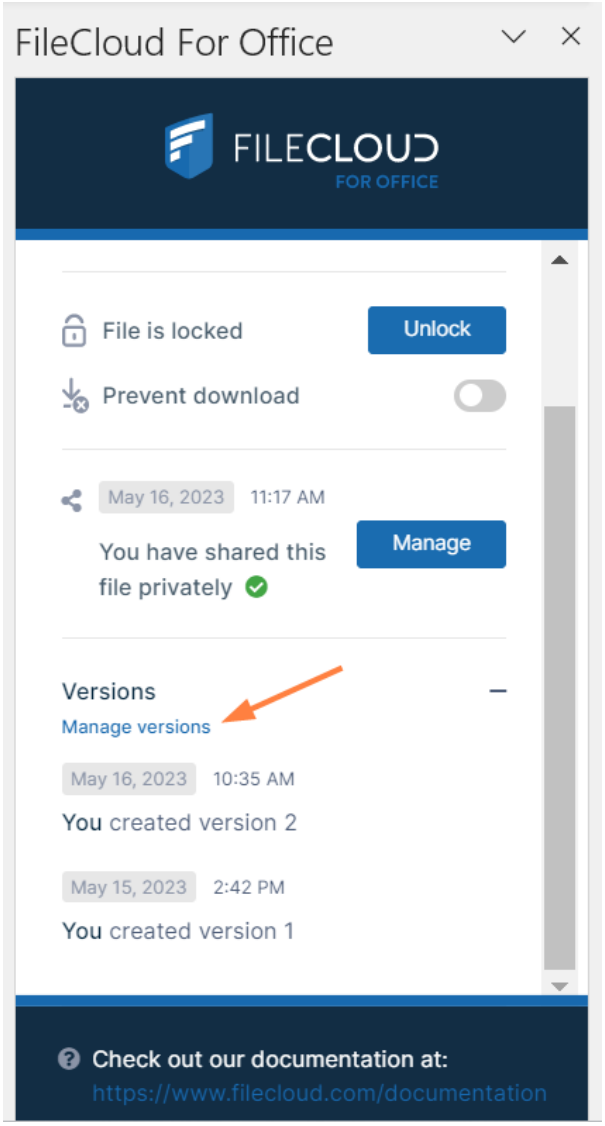


2. Click **Download** for the version that you want to download, and save it.

Details

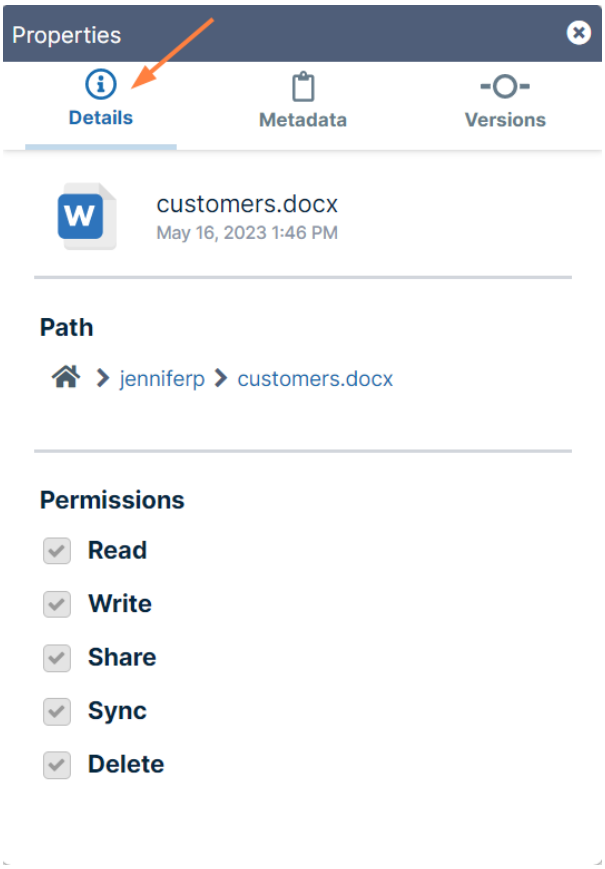
To view file details:

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



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

2. Click the **Details** tab.

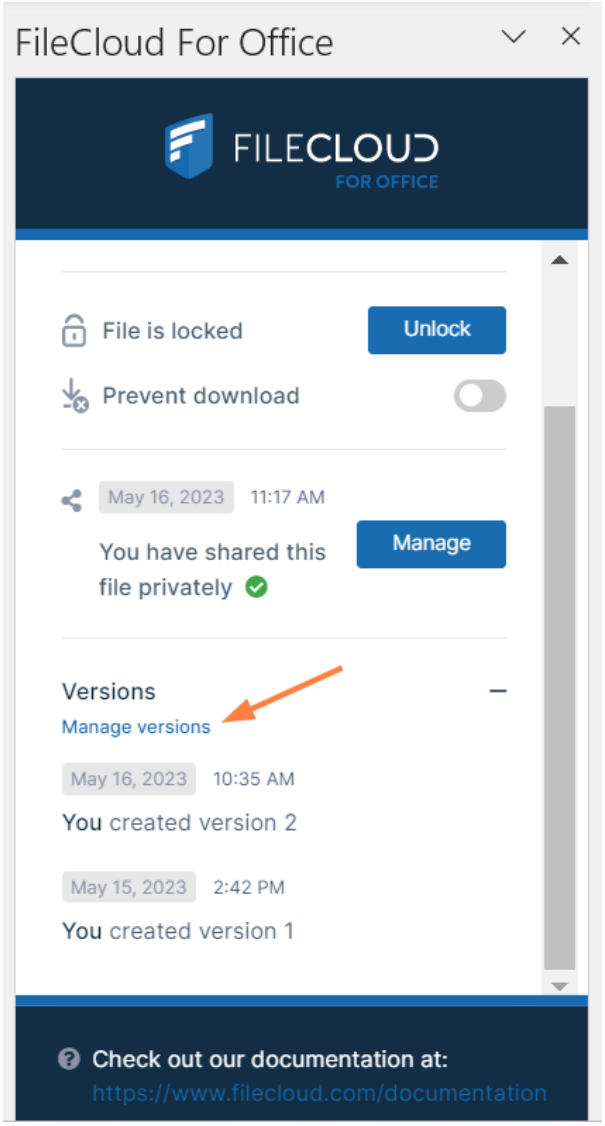


The details shown are the filename and type, the last modified date, the path of the file in FileCloud, and your permissions for the file.

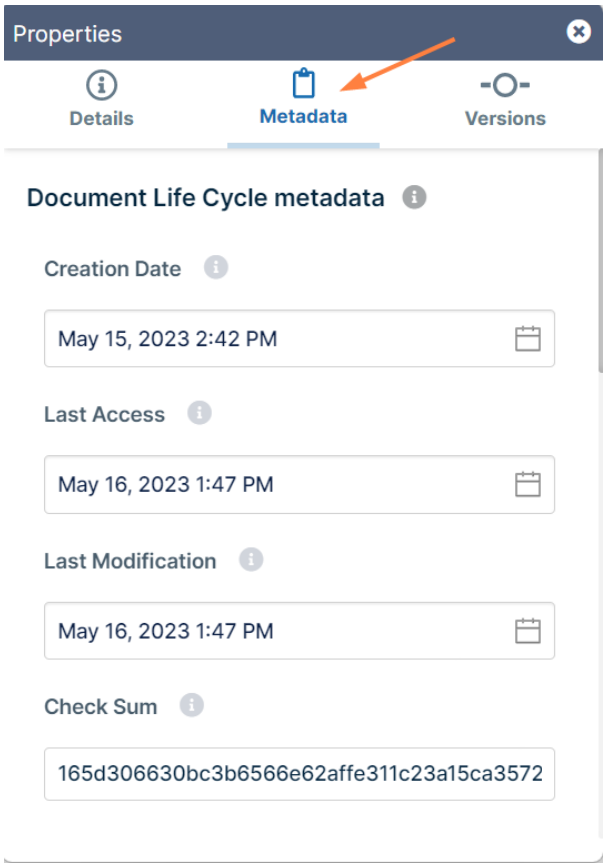
Metadata

To view metadata information for the file:

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



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



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

FileCloud for Office log locations

Locating FFO logs

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

Windows: %appdata%/FFOServer

macOS: /Users/[USERNAME]/Library/Preferences/FFOServer

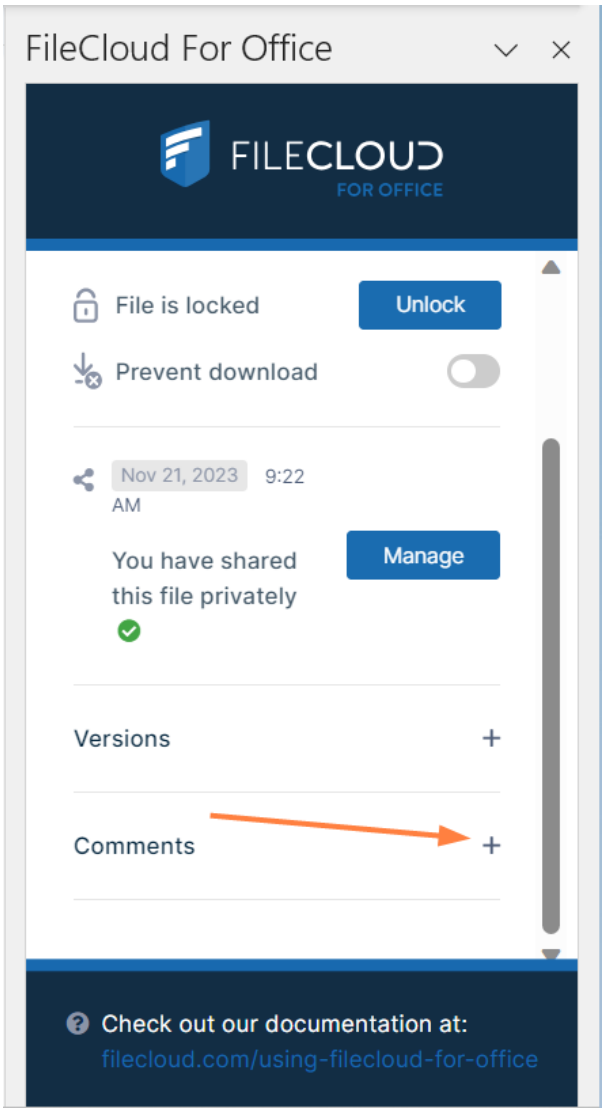
View and add comments

Viewing and adding comments

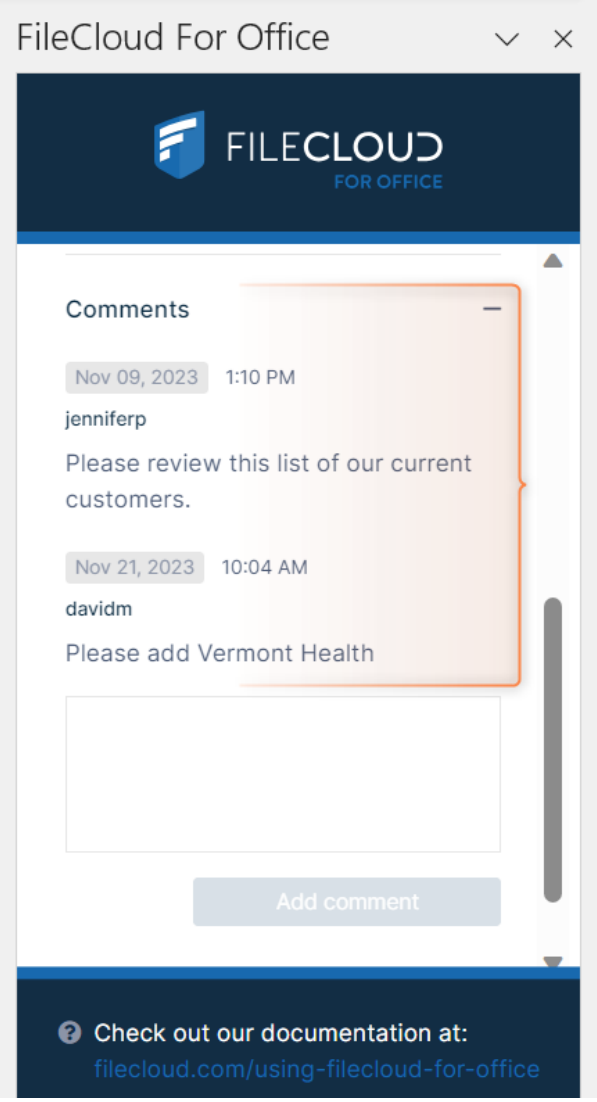
Comments added to files and folders in FileCloud for Office also appear in the user portal and any of the other client apps.

To view and add comments in FileCloud for Office:

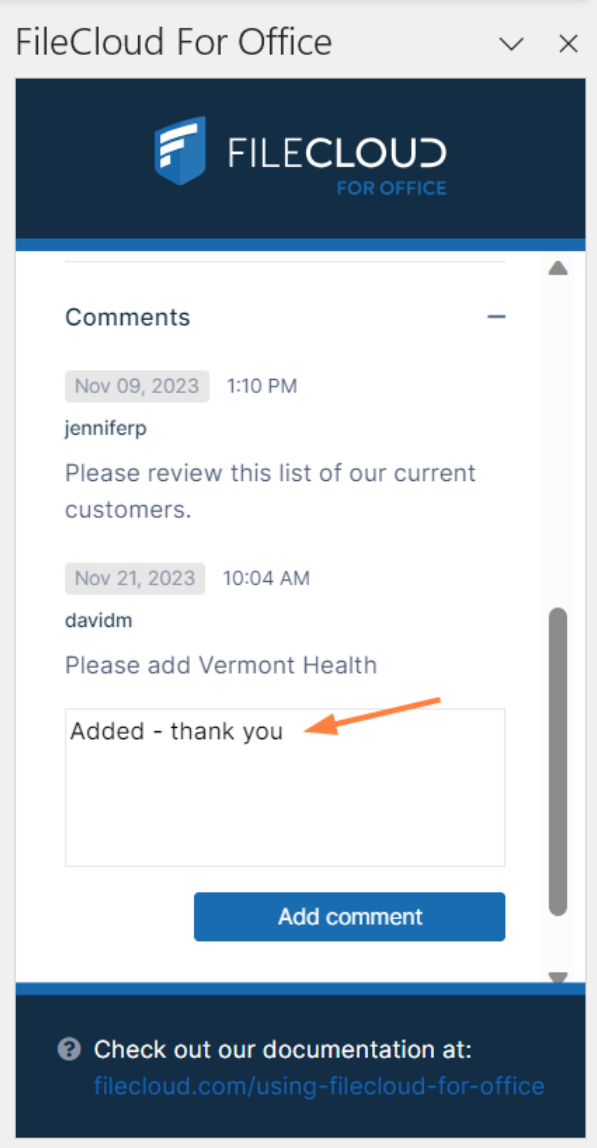
1. If **Comments** is not visible in the FileCloud for Office panel, scroll down to the bottom of the panel.
2. Click the **+** across from **Comments**.



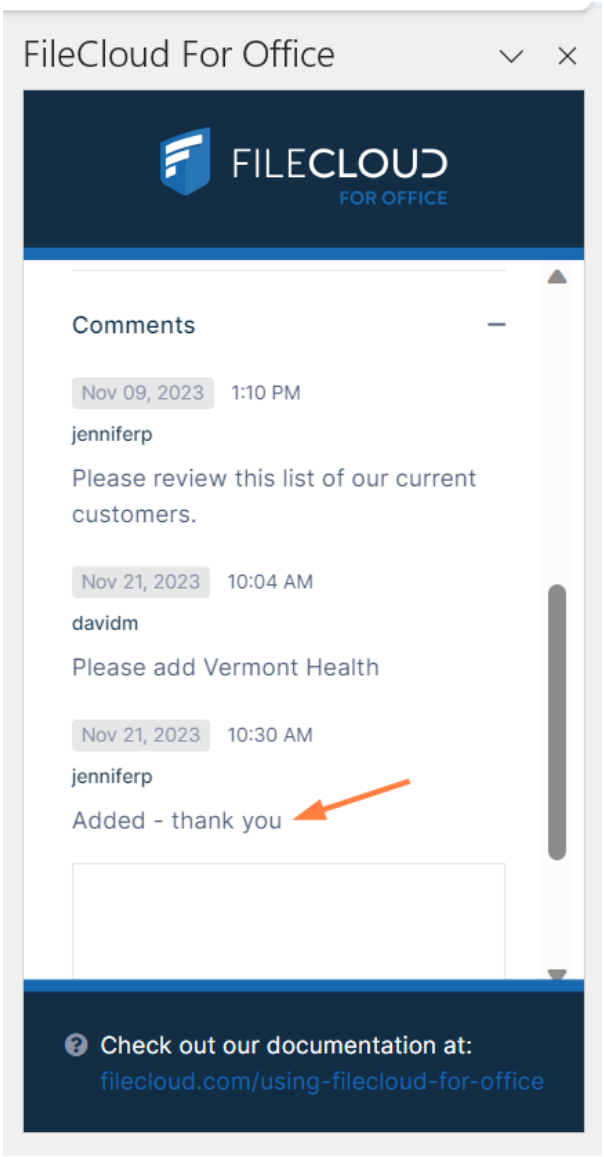
Any existing comments added to the file or folder here or anywhere else in FileCloud appear above the **Comments** box.



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



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



Sync Troubleshooting Guide

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

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

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

Files that don't sync

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

Long Filenames or Paths

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

Names Ending with "." or ","

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

Special Characters

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

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

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

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

- tonido.db
- Thumbs.db
- desktop.ini
- Anything ending with .tmp
- Anything ending with .lnk

- Files or Folders ending with space
- .tonidocache
- Folders with the name .cache
- Anything starting with Conflict_
- sync.ico
- .ds_store (starting with 4.71 version of Sync Client)
- Any hidden files (usually files starting with . in Linux and files with hidden attribute in windows)
- File names and file extensions which are restricted by the server admin
- Files that are in use

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

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

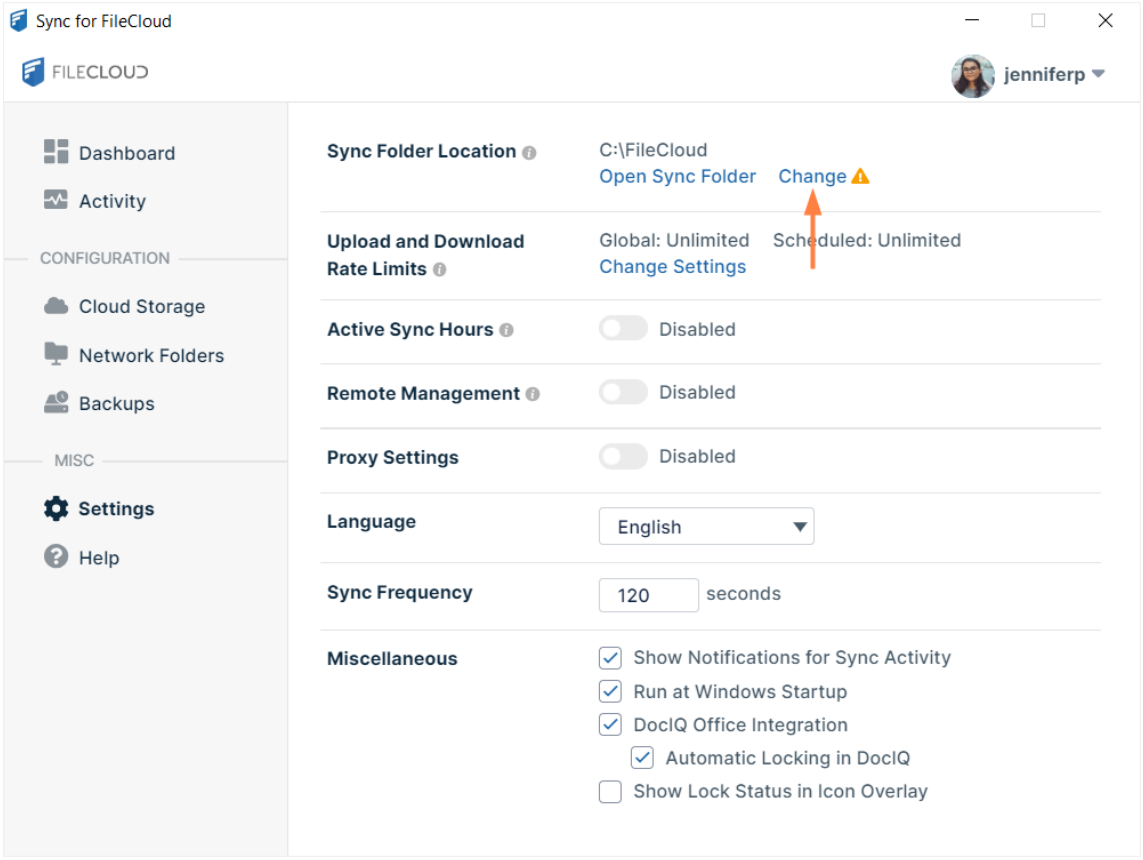
Change Sync Folder Location

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

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

To change the Sync folder location:

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



Your content explorer opens.

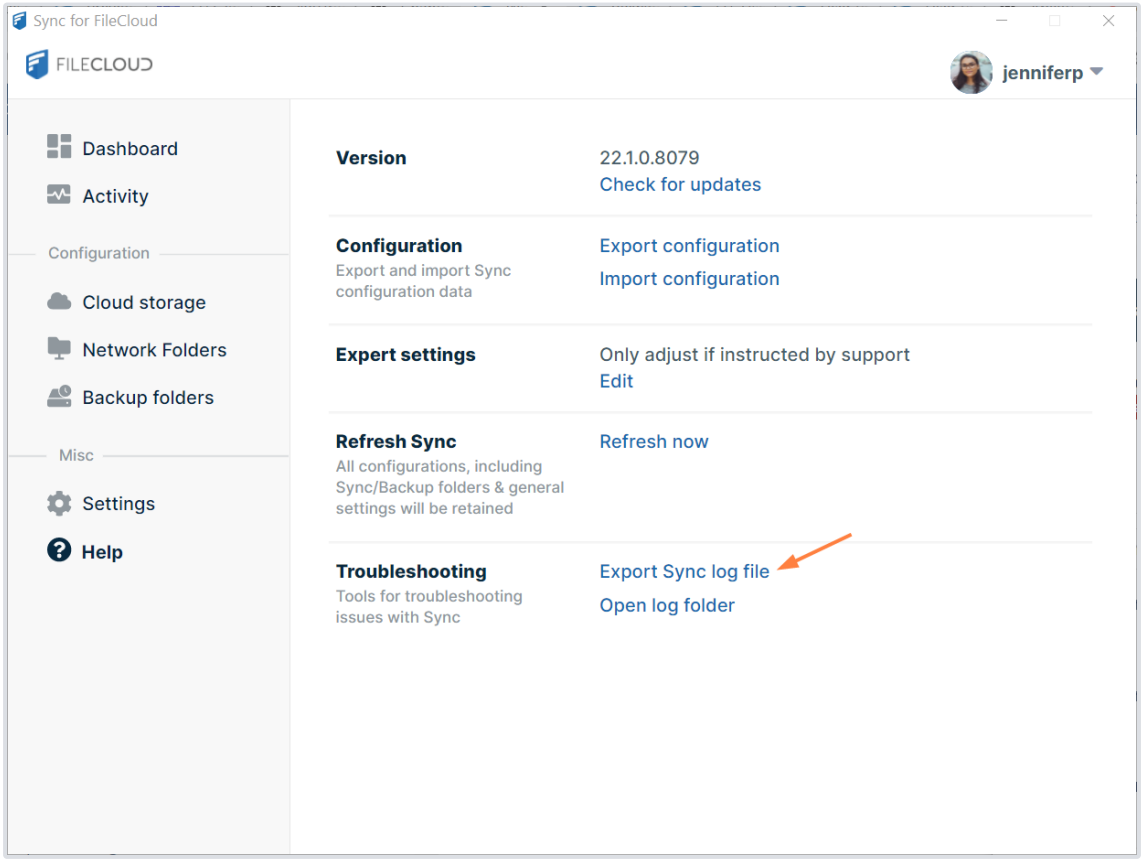
4. Choose a new Sync folder.
   At the bottom of the Settings screen, the message **Changes Saved. Restart Sync to apply the changes** is shown.
5. Restart Sync.

Sync Logs

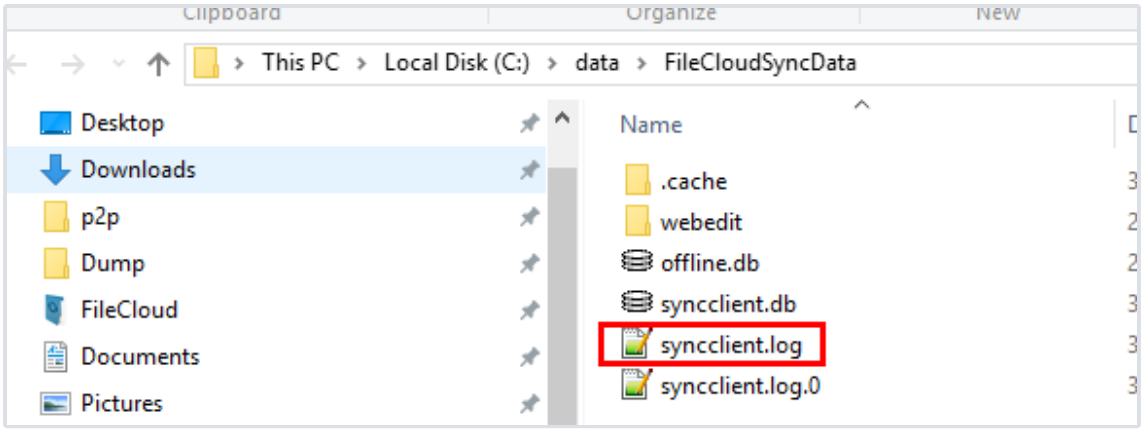
If the FileCloud Sync client stops working, you might need to send Sync data logs to Technical Support, so they can help address the issue.

To access log files**:**

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



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



Sync Engine Types

FileCloud Sync has two types of synchronization engines.

- A real-time synchronization engine

- A periodic synchronization engine

Real-time Synchronization

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

Periodic Synchronization

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

	Real-time Synchronization	**Periodic Synchronization**
Local Change Upload Frequency	Uploads local changes as soon as a local file changes.	Uploads changes after specific intervals.
Remote Change Download Frequency	Default is every 2 minutes; can be changed by changing the **Sync Frequency** in the Settings screen of the main dashboard.	Downloads changes after specific intervals.
Type of Remote Storage	Managed Storage (My Files and Shared with Me)	Local to remote backup,
Initial Setup	Folders under My Files and Shared Folders with Sync permissions are automatically downloaded.	User manually chooses folders to download and sync.
Limits	• Managed Files (no limit, tested up to 300,000 files).	Efficient up to 500-1000 folders. The more folders, the longer it takes to synchronize.

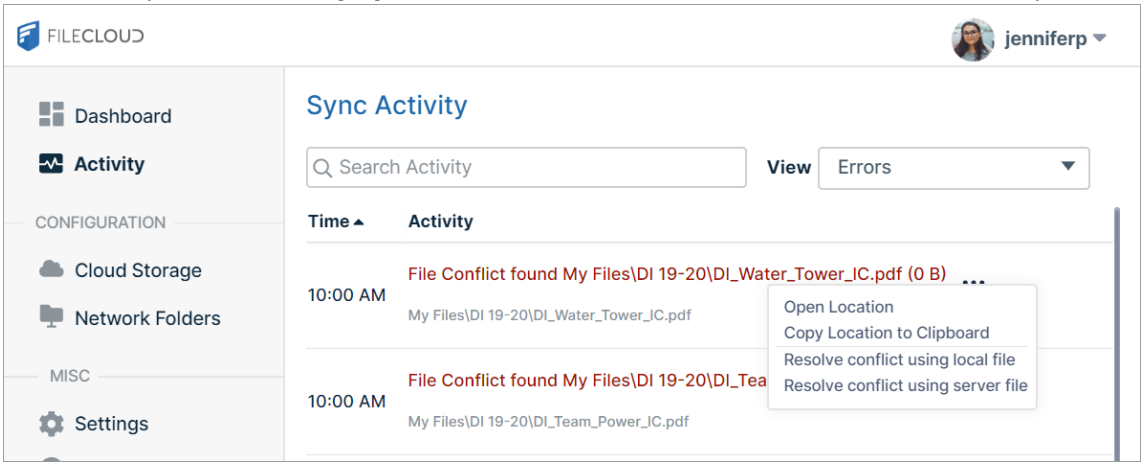
View Sync Error Details

View errors from the Sync Activity screen

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

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

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



6. To resolve file conflicts, see Managing Sync Conflicts.

Sync Errors: Causes and Resolutions

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

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

Shared with Me Folder is not syncing

Cause

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

Resolution

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

Private Share Permissions for Folders

Team Folders are not synchronizing

Cause

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

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

Resolution

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

Initial sync is taking too long

Cause

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

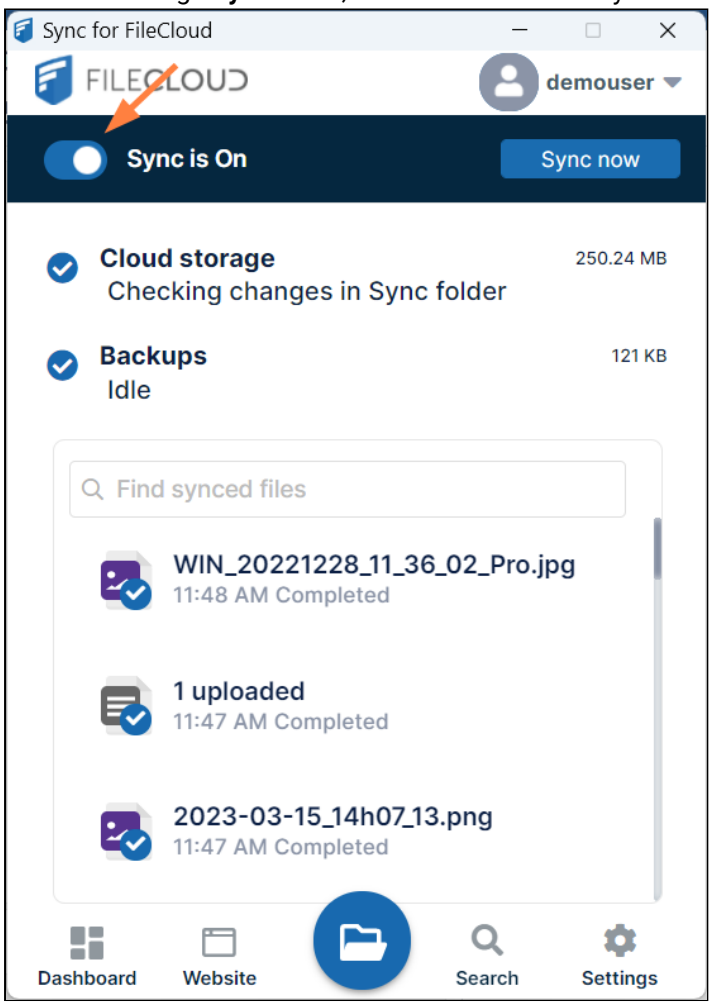
1. Downloads all the files from the FileCloud server; and
2. Stores the files in the temporary Sync cache folder; and
3. Copies the files into the Sync folder.

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

⭐Subsequent file synchronization will be faster.

Resolution

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



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



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

Download Sync Error

Cause

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

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

Resolution

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

Upload Sync Error

Cause

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

Resolution

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

File Overlays not appearing on Windows

Cause

The computer requires a reboot after installation.

Resolution

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

Some files are not syncing

Cause

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

..

****

/

:

*****

?

"

<

>

|

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

Resolution

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

Sync is looping continuously on some folders

Cause

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

For example:

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

Resolution

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

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

File changes are not uploading

Cause

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

Resolution

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

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

Cause

Finder includes files and folders in the total list of items so that number will be different from the number of files reported in Sync.
Also .DS_Store files are not synced by sync app, so those files will not be synced.

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

Number of files in sync will match A - B

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

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

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

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

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

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

FileCloud Drive

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

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

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

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

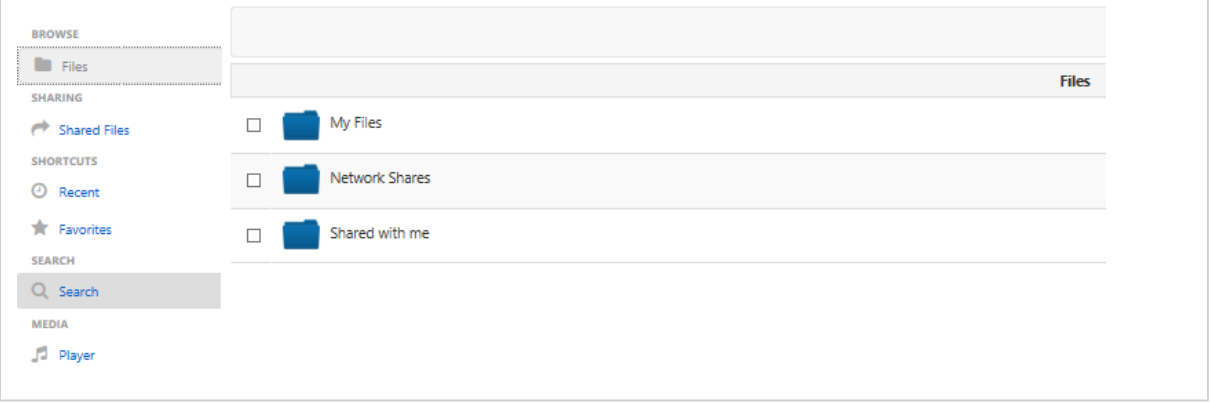
This section describes how to use Drive on a Windows computer; however, you can also use Drive on a Mac with FileCloud Drive for Mac.

What is FileCloud Drive?

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

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

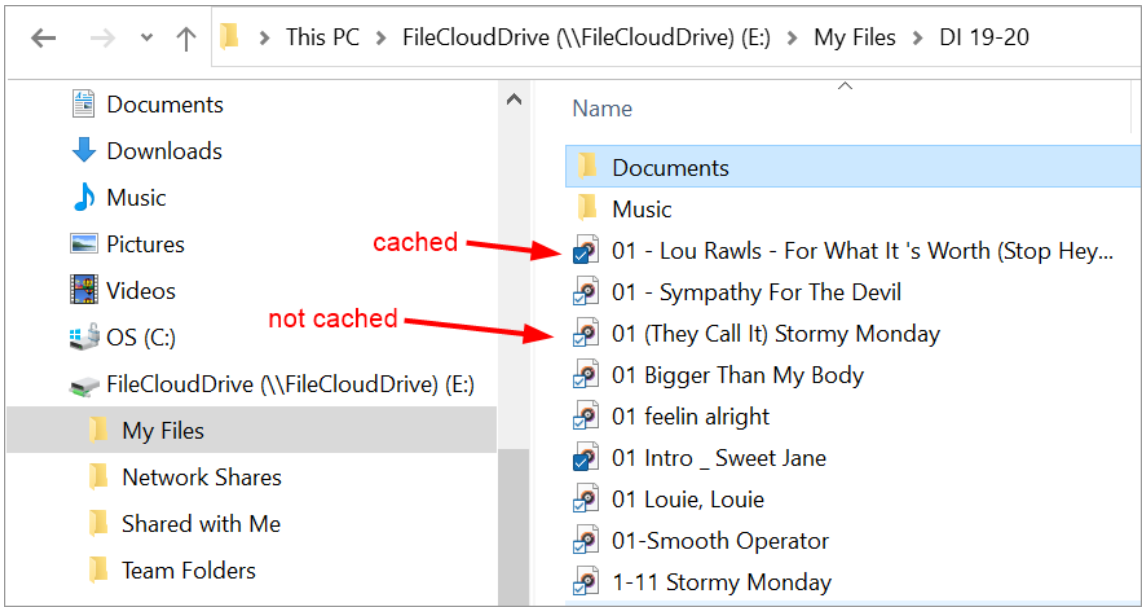
This is how our files are accessible in the FileCloud Server application.



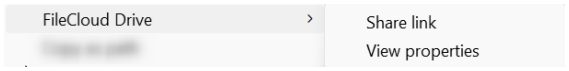
When you open one of your Drive folders, the same contents that appear in the FileCloud user portal are listed. Files are cached when they are initially accessed (either by the system during download or by you when you initially open them).

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

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



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

A File	A Folder
	

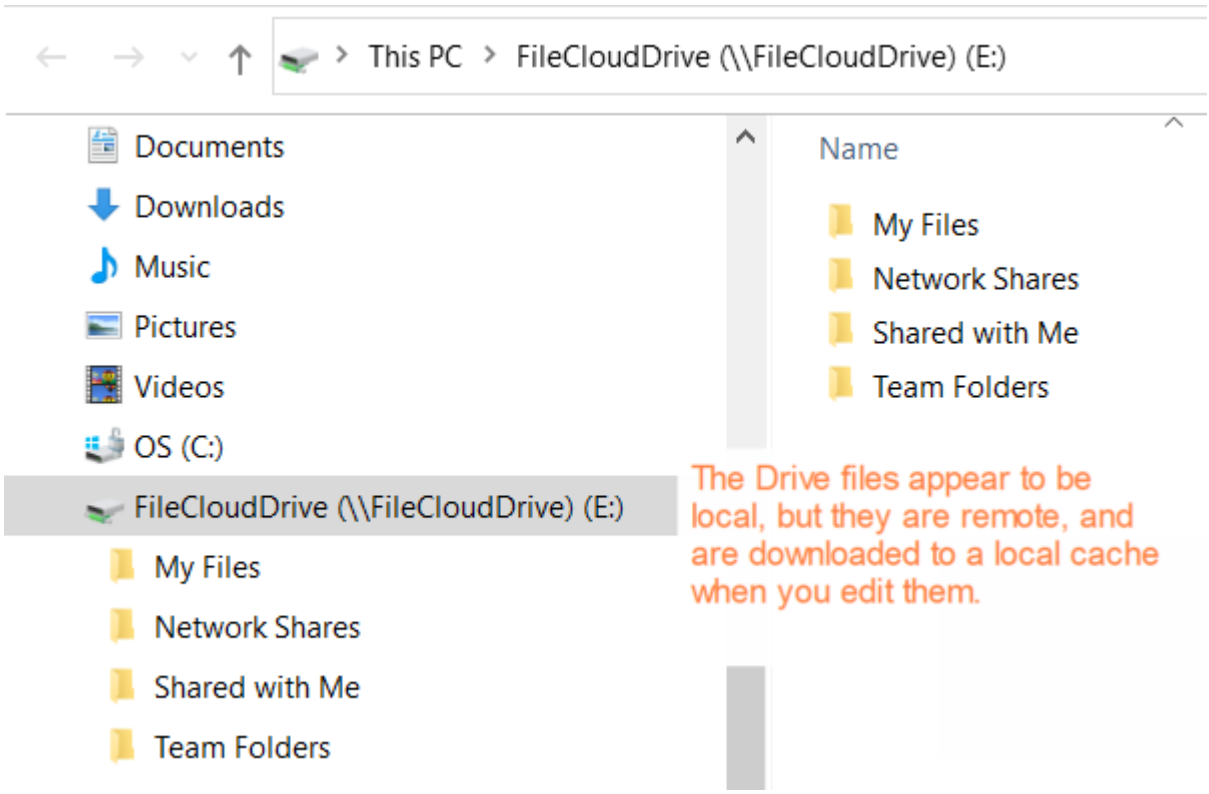
When you right-click on a file or folder in Team Folders or Shared with Me and choose **Show More Options**, you also see an option to share a link with someone who already has access to the Team Folder or Shared with Me. To share a link with someone who already has access to a folder, see Sending a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

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

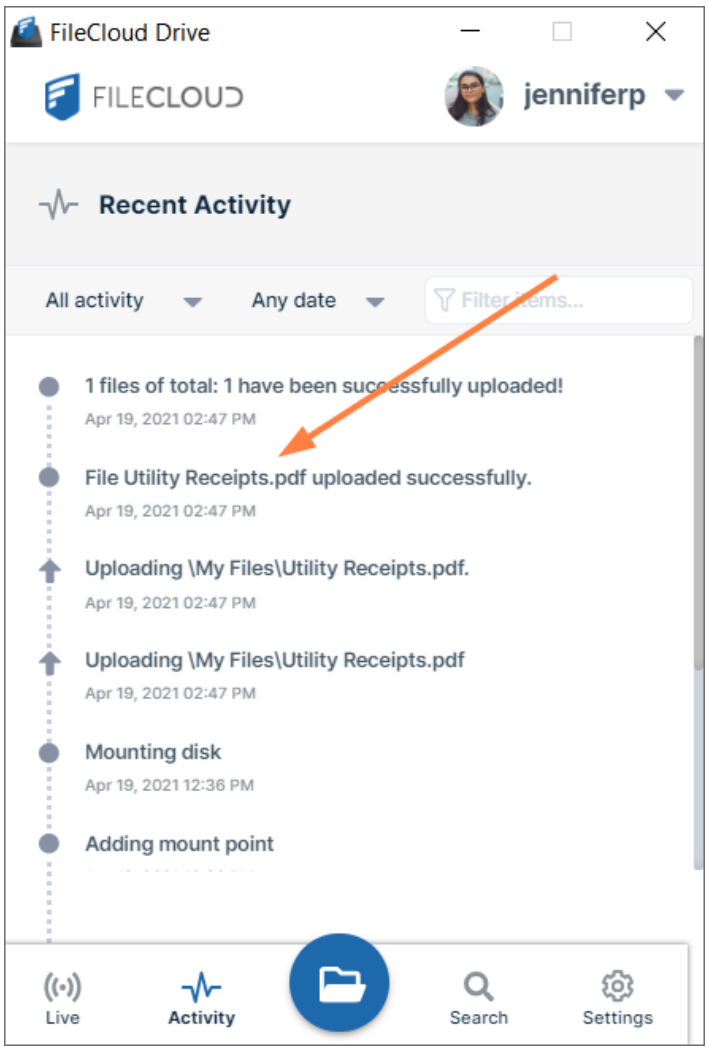
Understanding FileCloud Drive

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

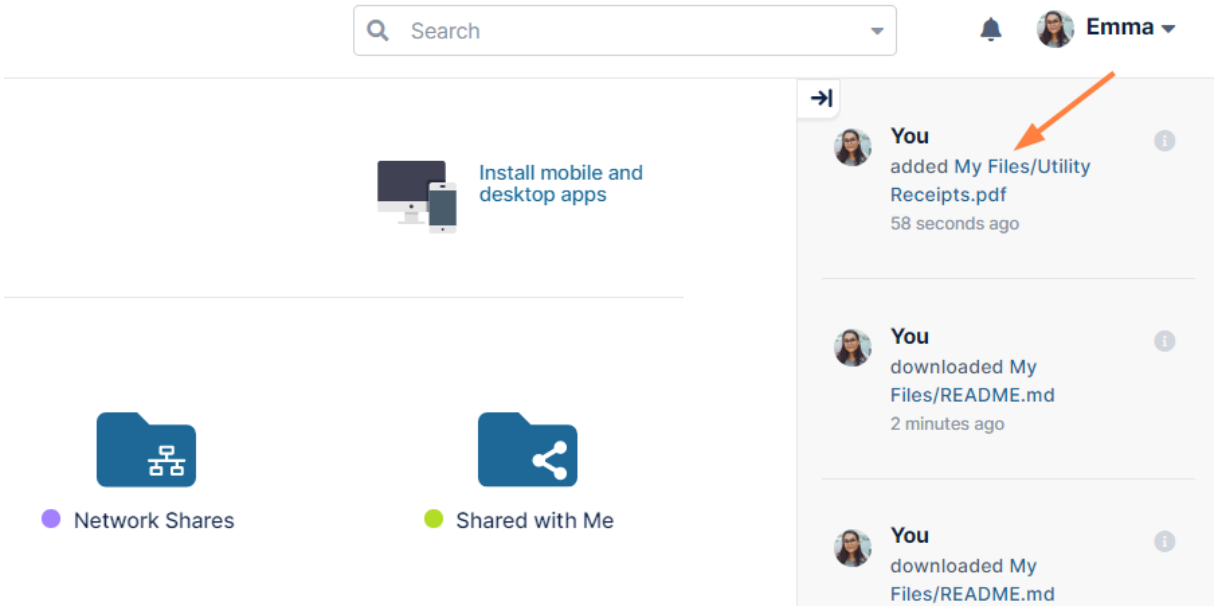
to FileCloud's remote server.



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



File upload notification in Drive app.



File upload notification in FileCloud user portal.

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

Network Dependency	Description	Best Practice
File size determines download time.	When you have a large file, for example 1 GB, and you try to open it in an application via FileCloud Drive, it is not instantaneously available like smaller files. The time it takes to be downloaded from the remote connection and then opened is visible to you, and depending upon your network connectivity this could take a while.	Use FileCloud Drive to work with small to medium sized files Use FileCloud Drive to edit documents Use FileCloud Drive to upload a small number of files or download small documents. FileCloud Drive is more convenient than using the web portal to edit files because it avoids manually downloading the file first, editing it, and then re-uploading it to the server. FileCloud Drive's explorer window automatically opens the document in the application, allows you to edit, saves it, and then uploads the file back to the server. Use FileCloud Sync If you are working with files that are 1 GB or larger, because they are stored directly in File Explorer.
Network connectivity determines how long it takes to complete an action.	When you choose an action like copy or delete from the system tray menu, the cursor icon animates until all operations are committed to the FileCloud Server. When the action is complete, the cursor stops animating. The time it takes the action to complete depends on the speed of your network connection. That is why it is better to use Drive with small files and small amounts of files at once.	Wait for the cursor to stop moving before choosing another action.

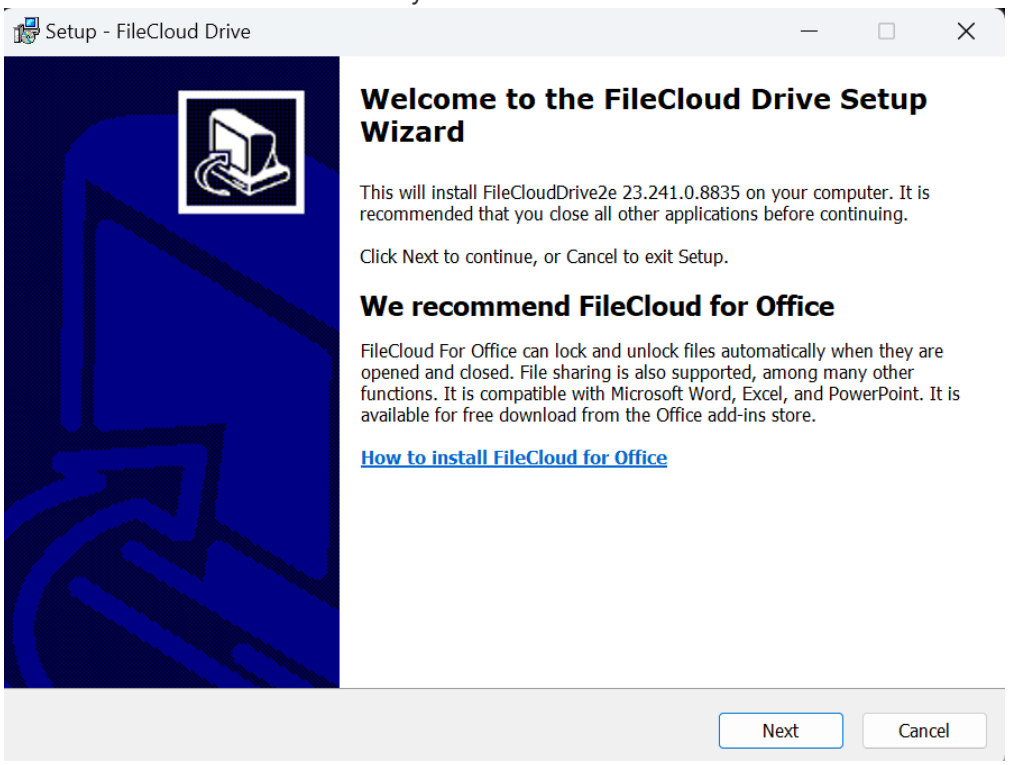
Installing FileCloud Drive

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

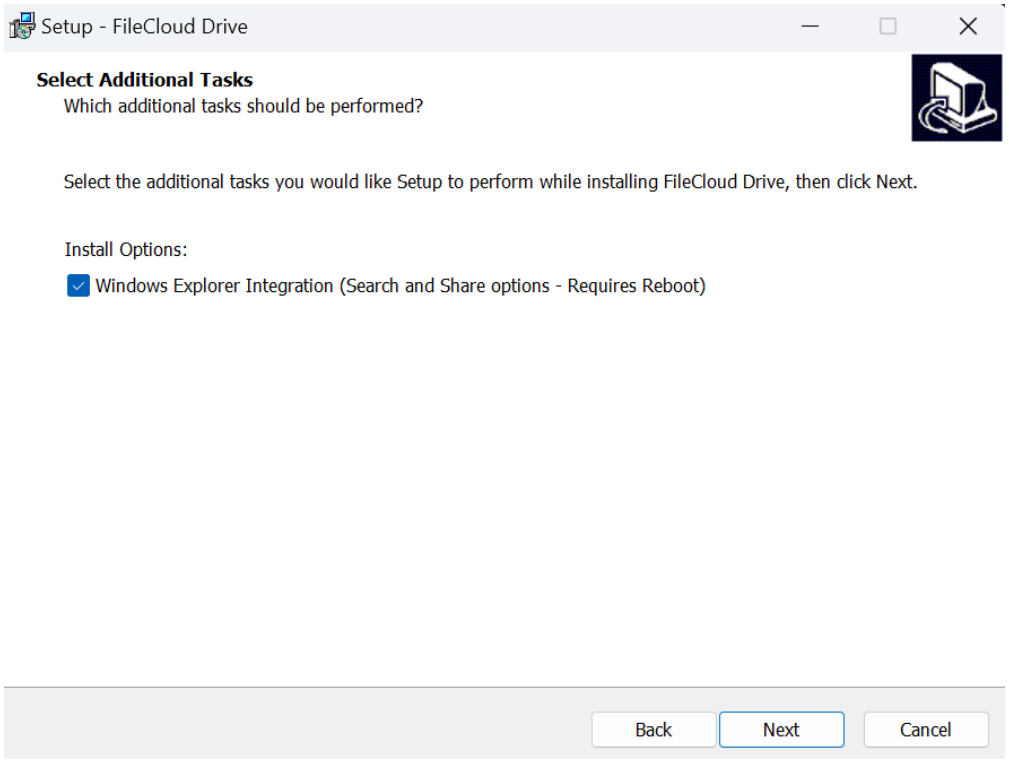
To install FileCloud Drive:

1. Download FileCloud Drive from the following URL:
   http://www.filecloud.com/additional-downloads/#drive
2. To run the installation wizard, click the FileCloudDrive2eSetup.exe execution file you just downloaded.

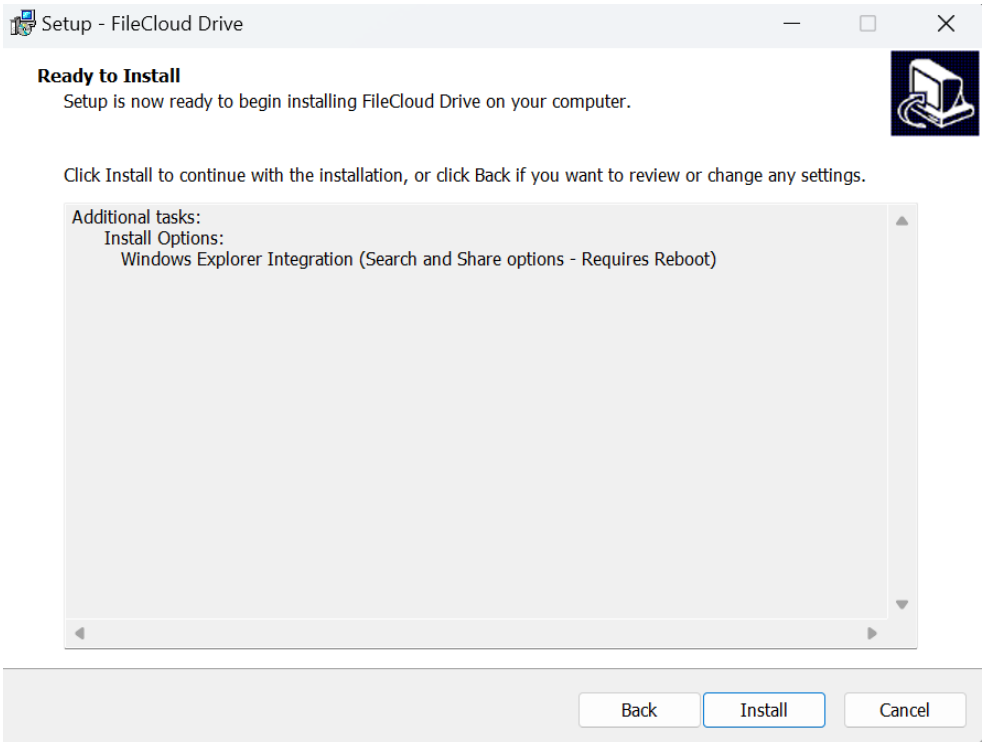
The first screen recommends that you use the FileCloud for Office feature.



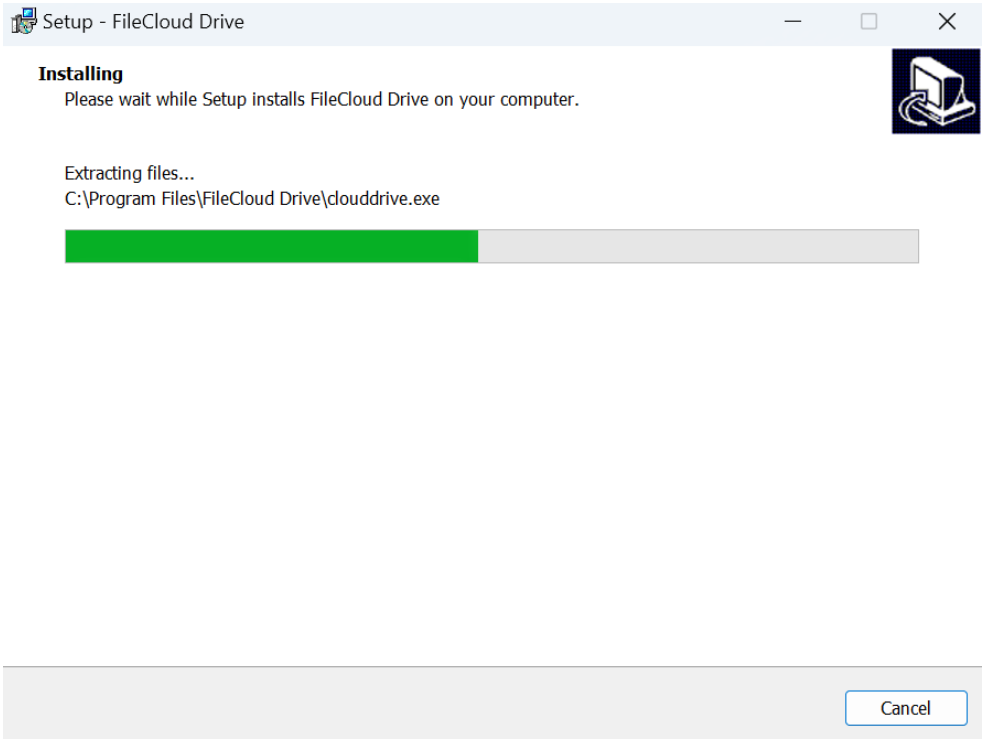
3. Click **Next**.



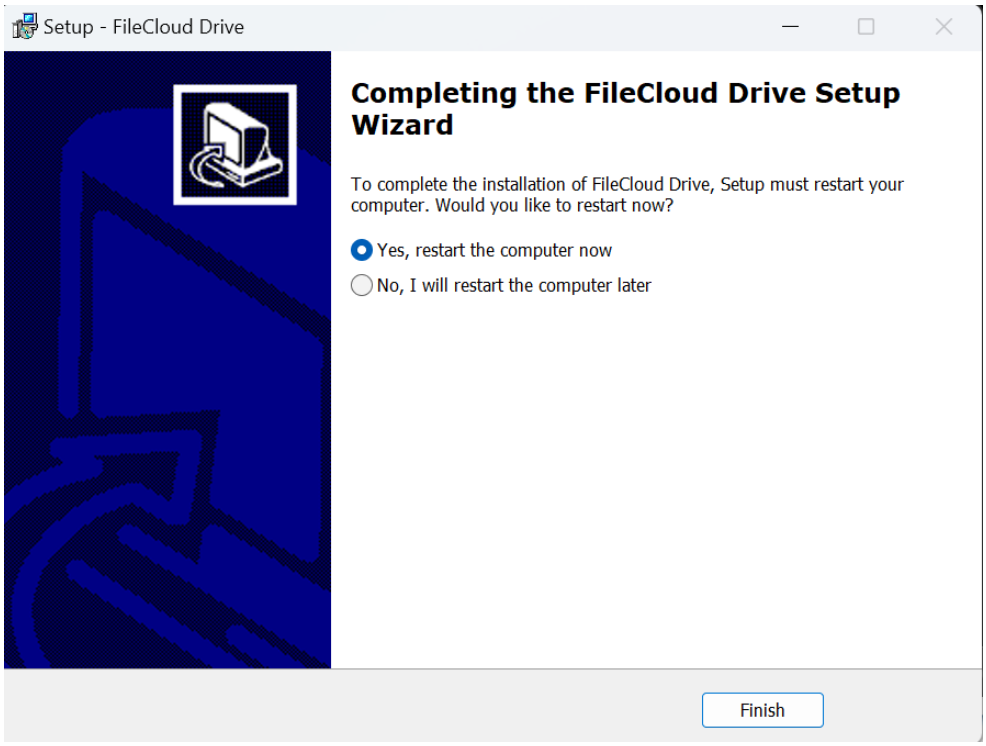
4. Leave the checkbox checked, and click **Next**.
   The next screen appears:



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



When installation is complete, the following screen appears:

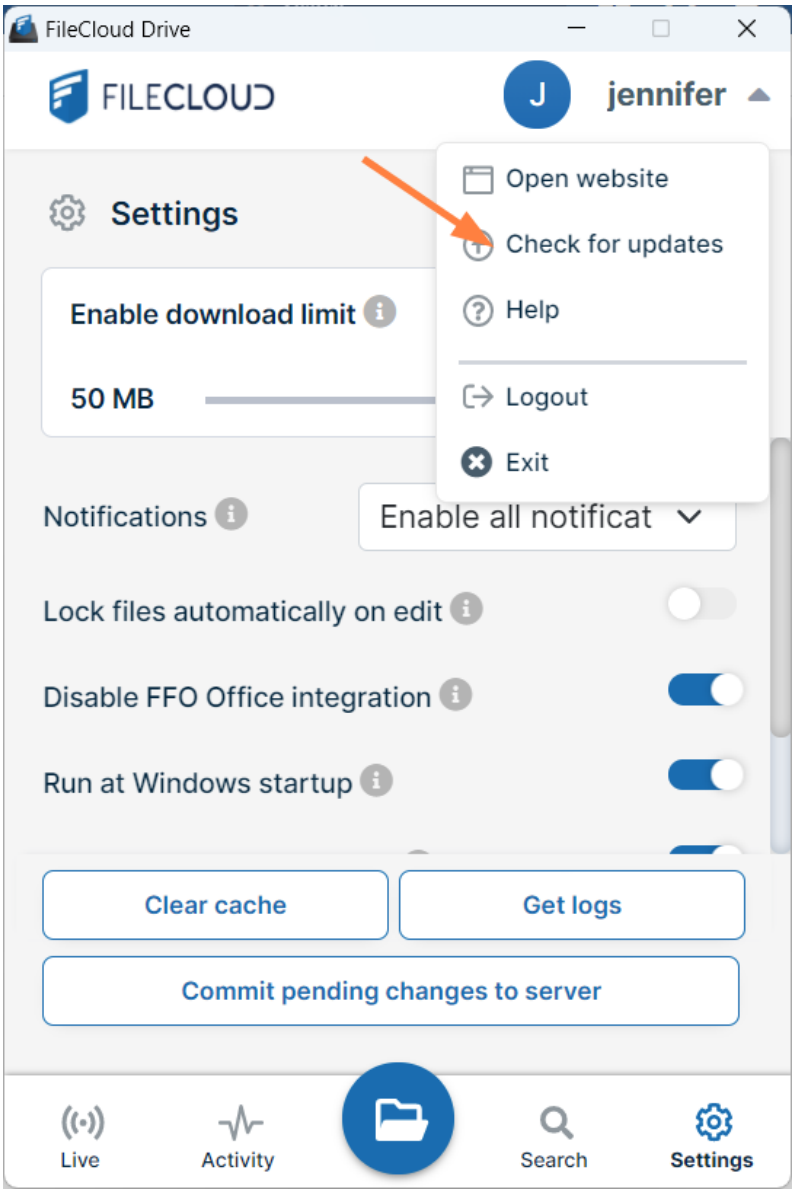


6. Leave **Yes, restart the computer now** selected to begin using Drive or the latest version of Drive, and click **Finish**.

Checking for Drive Updates

To check if there are updated versions of Drive:

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



If there is a new version of Drive available, the message **A newer version is now available. Updating is highly recommended. Download the new version and exit now?** appears.

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

Start and Log In to Drive

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

- The same content that is available from the User Portal is listed locally as a drive.

- You can add/delete/edit files that are stored on your FileCloud Server folder from the drive.

Starting Drive

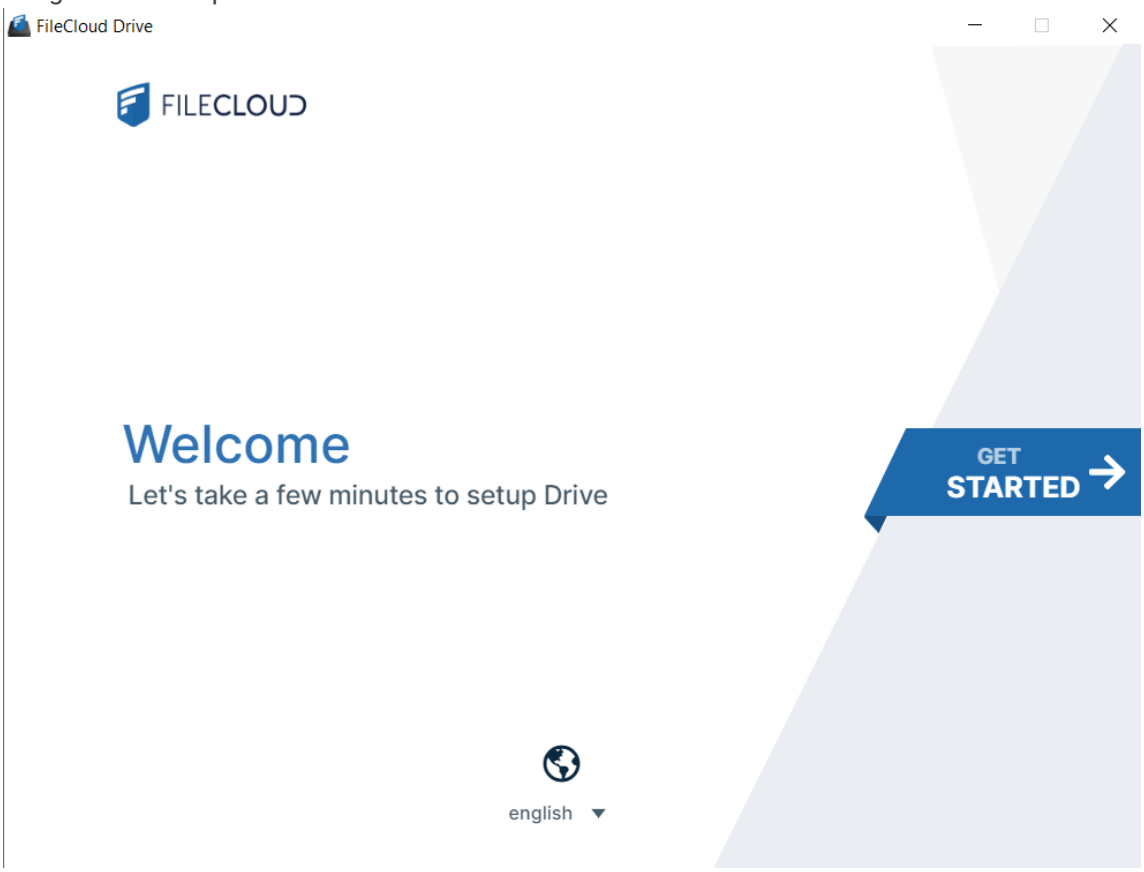
Starting Drive and the startup wizard

If Drive did not run after you restarted your computer:

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



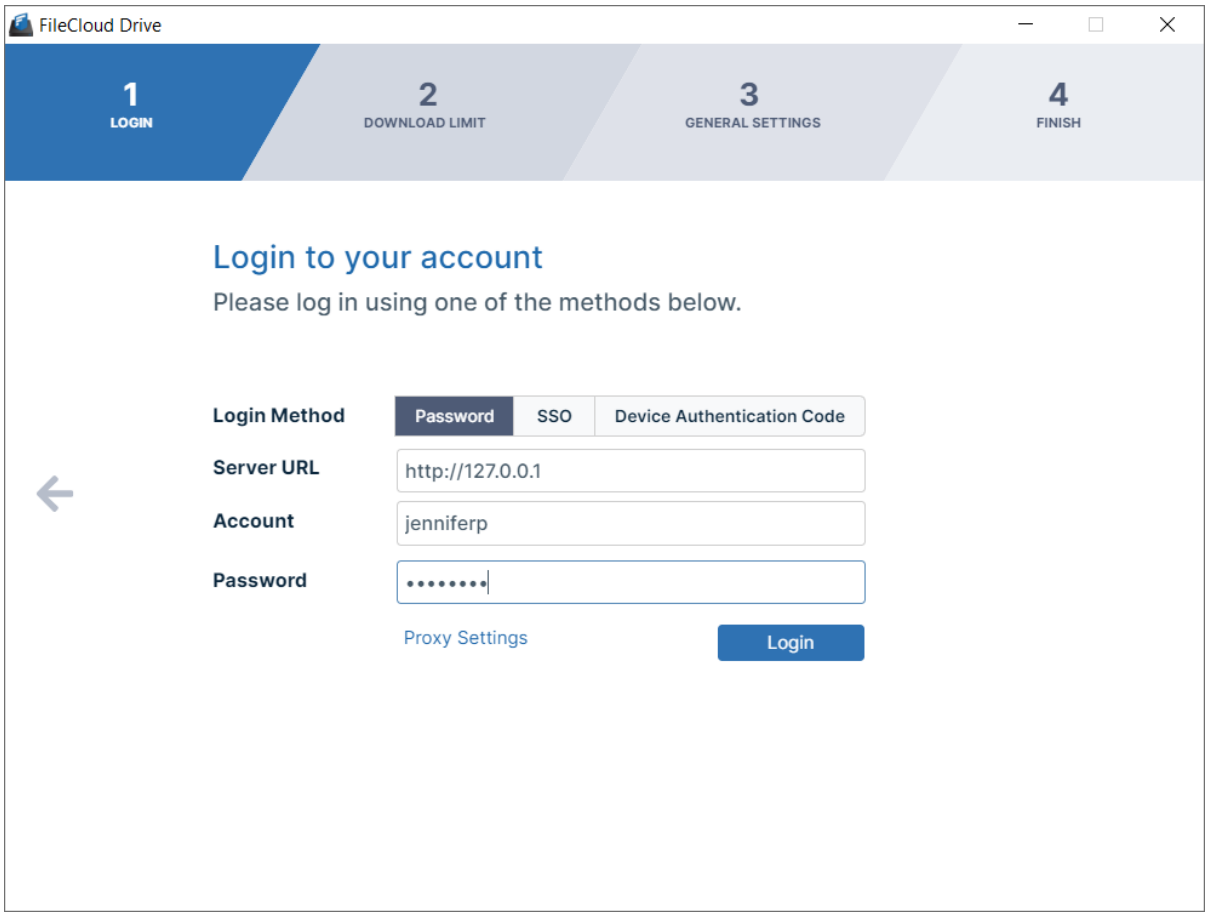
A log-in window opens.



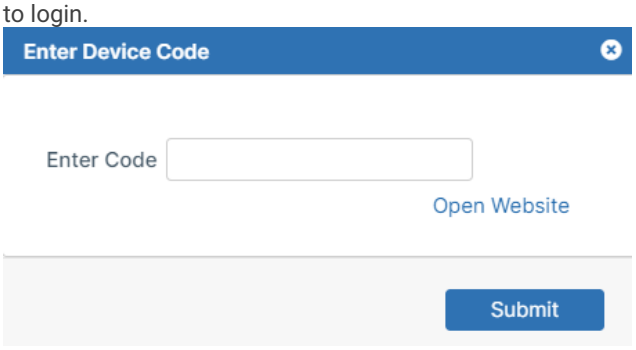
2. To change the user interface language from English, use the drop-down list at the bottom of the screen.
3. Click the **Get Started** banner to go to the next screen.

Step 1: The wizard's log-in screen

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

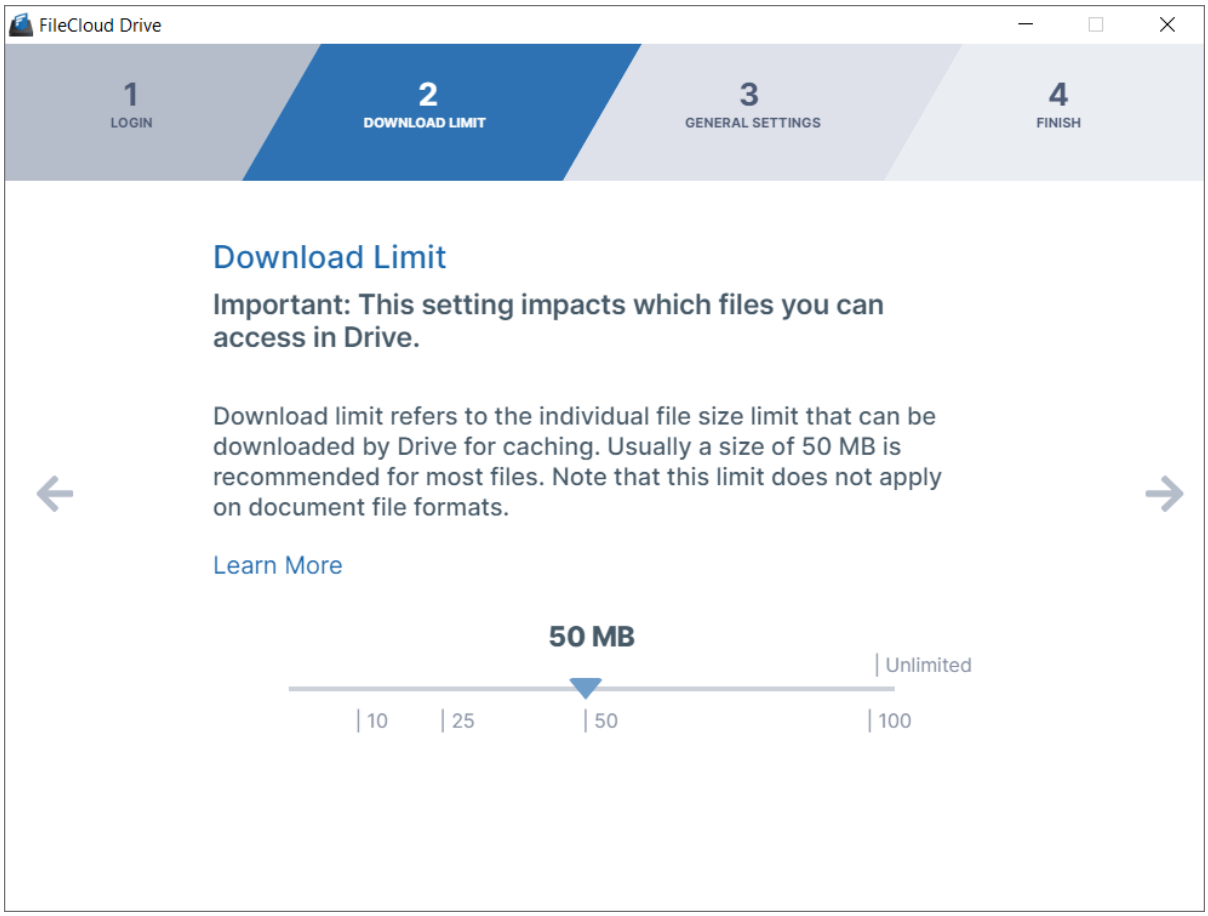


1. Choose a **Login Method**.
   To log in with SSO, see Log In Using Single sign-on (SSO).
   To log in using a device authentication code, see Using Code Based Authentication for Drive.
2. In **Server URL**, enter your server address.
3. In **Account**, enter your username.
4. In **Password**, enter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

Setting	Description	Example
Server URL	The URL to the FileCloud Server. You can find this URL • In the Welcome to FileCloud email you received with your user account • By contacting your Administrator	https://<myteam>.<filecloud_site>.com
Account	Your FileCloud account name or email address. You can find this URL • In the Welcome to FileCloud email you received • By contacting your Administrator	<user name> username@myteam.myfilecloud.com
Password	The password to your FileCloud account.	
SSO	Single sign-on (SSO) is a user authentication process that permits you to enter one name and password in order to access multiple applications.	Drive users can read about: Log In Using Single sign-on (SSO)
Device Authentication Code	This allows you to get a Device Authorization Code to connect to the server instead of a username and password. Your administrator must configure this option. If they do: 1. You must enter the server URL, the user account name (or email), and then click the "Request Access" button. 2. If the request access was successful, you will get the following dialog which needs a device authorization code to login. 	Administrators can read about: Configuring Desktop Apps Login support - Code Based Authentication Drive users can read about: Using Device Authorization Codes
Proxy Settings	If your company requires a proxy server to connect to internet, then you must provide that information. In the log-in screen of the dashboard, click Proxy Settings in the wizard's Log In screen.	Enter Proxy Settings

Step 2: The wizard's Download Limit screen

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



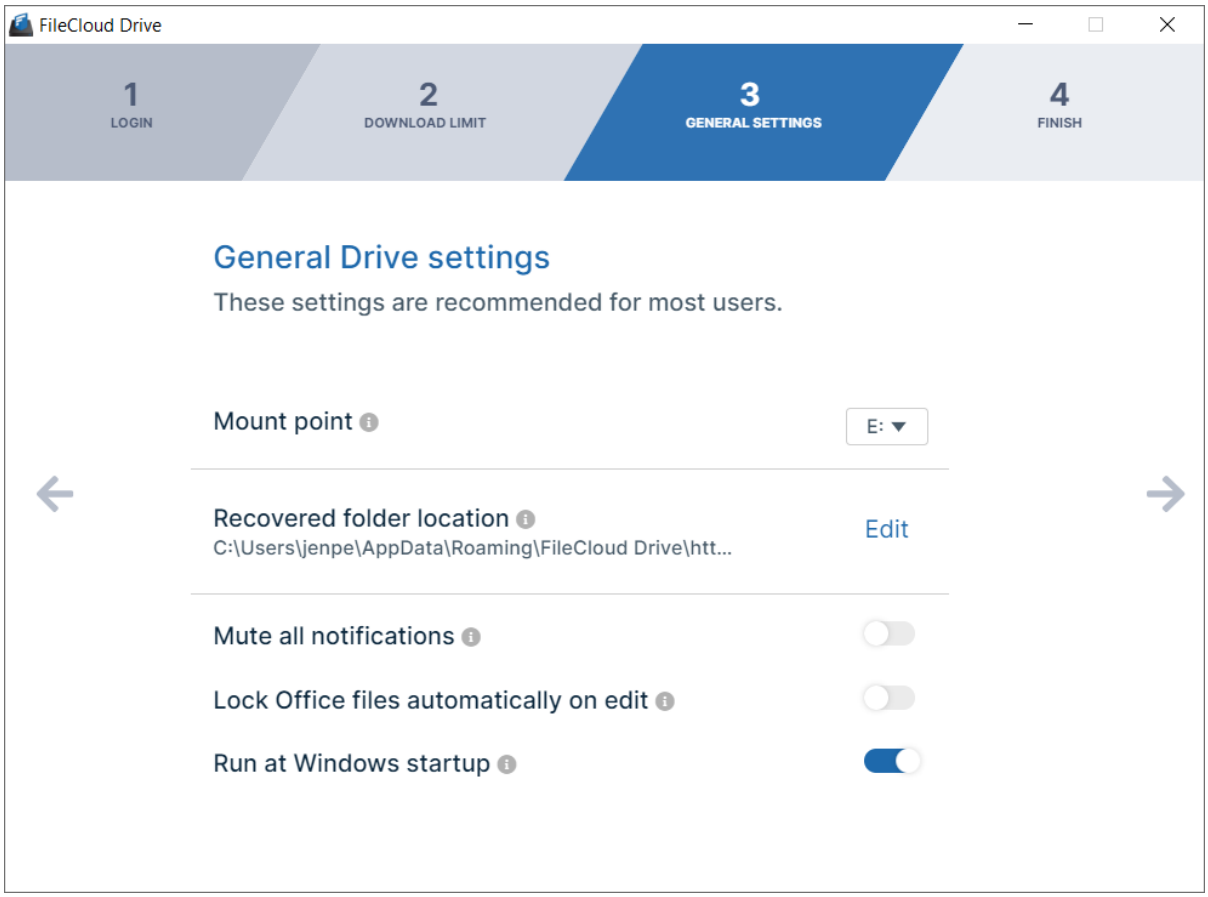
Before a user can read or update a file in Drive, the file must be fully downloaded, which may lead to heavy bandwidth usage. To limit this, FileCloud Drive has a maximum file size download limit setting which is set to 50 MB by default. You may adjust this setting depending on your system's performance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

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

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

Step 3: The wizard's General Settings screen

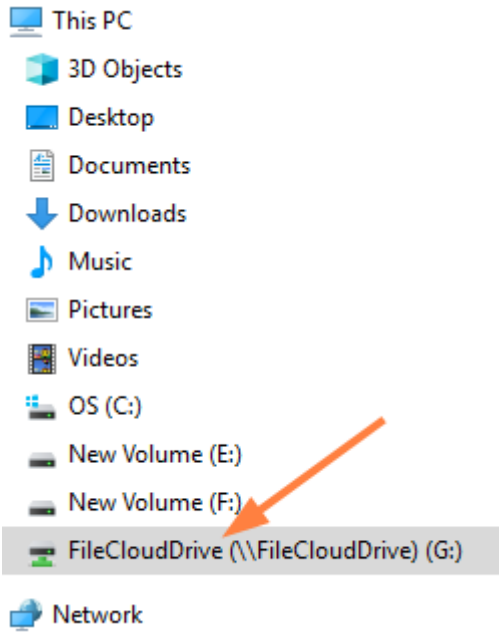
After you click the right arrow in the **Download Limit** screen, the **General Drive Settings** screen opens.



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

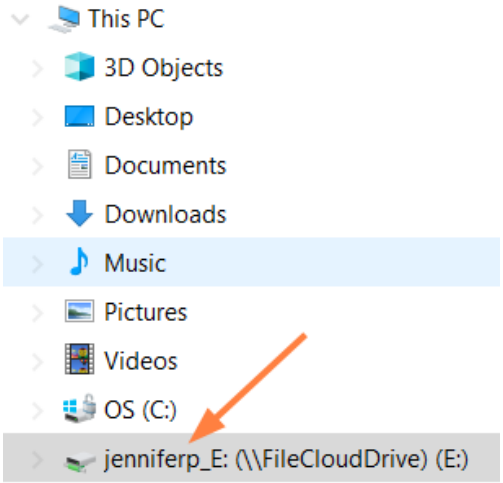
Setting the mount point's the volume name:

By default, FileCloud Drive autogenerates the volume name as **FileCloudDrive**. This appears in the volume label.



To have the volume label use the user's display name:

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



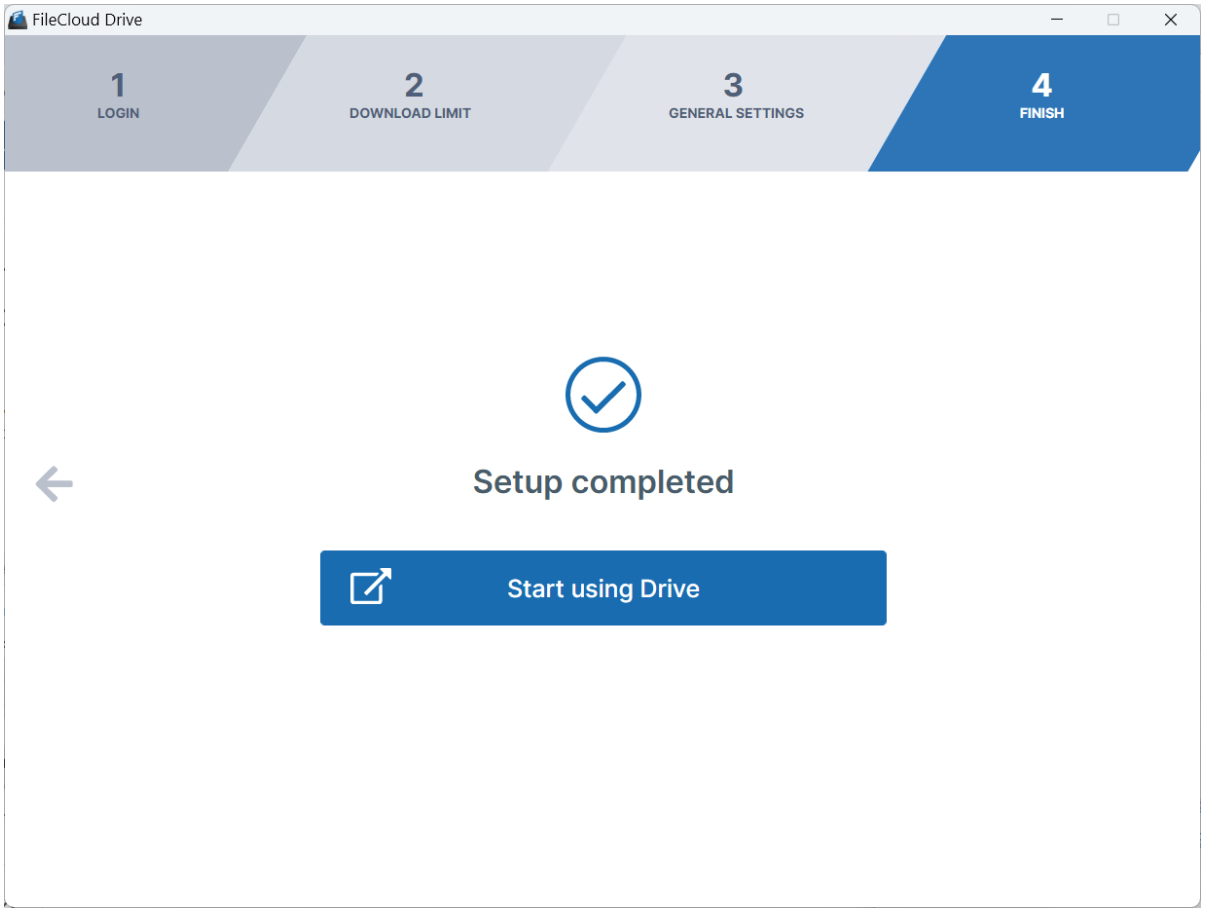
Allowing multiple instances to run:

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

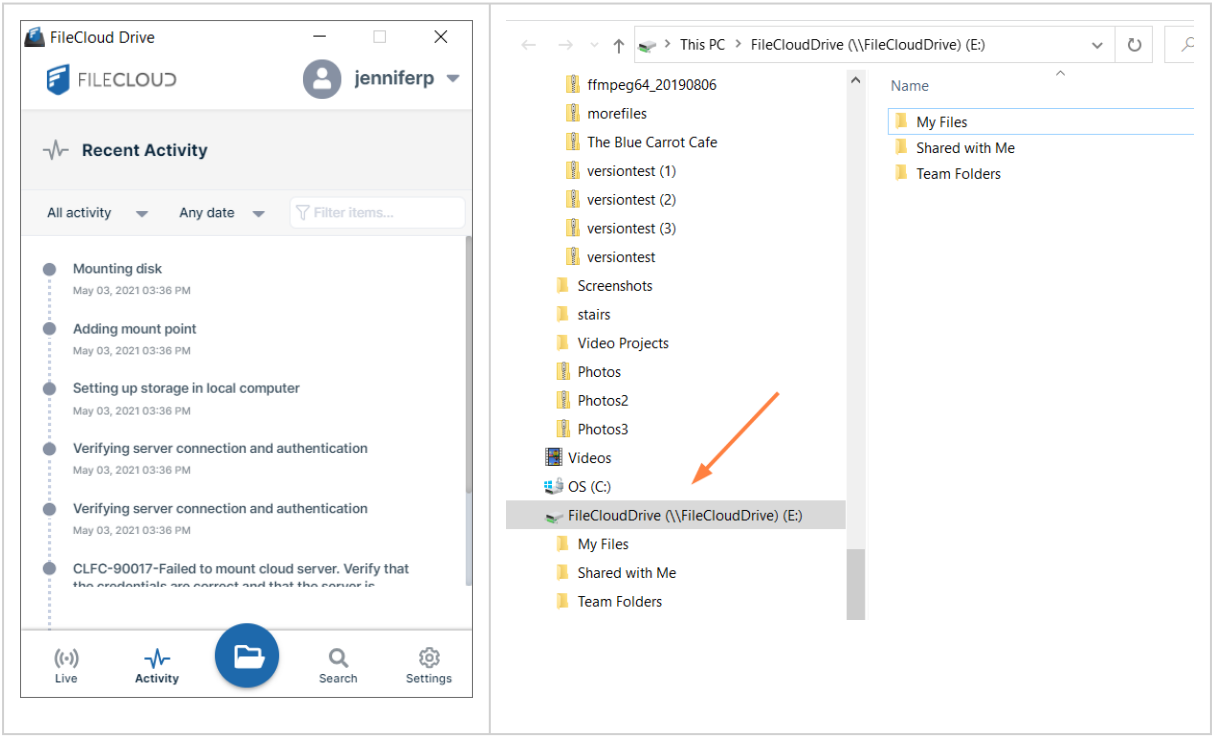
1. Open the FileCloud Drive configuration file for editing.
   It is located in **Program Files/FileCloud Drive/service/config.xml**.
2. To allow multiple instances to run, include the key:
   <multimount>1</multimount>
3. Also include the key:
   <useuniquemountlabel>1</useuniquemountlabel>

Step 4. Finish

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



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



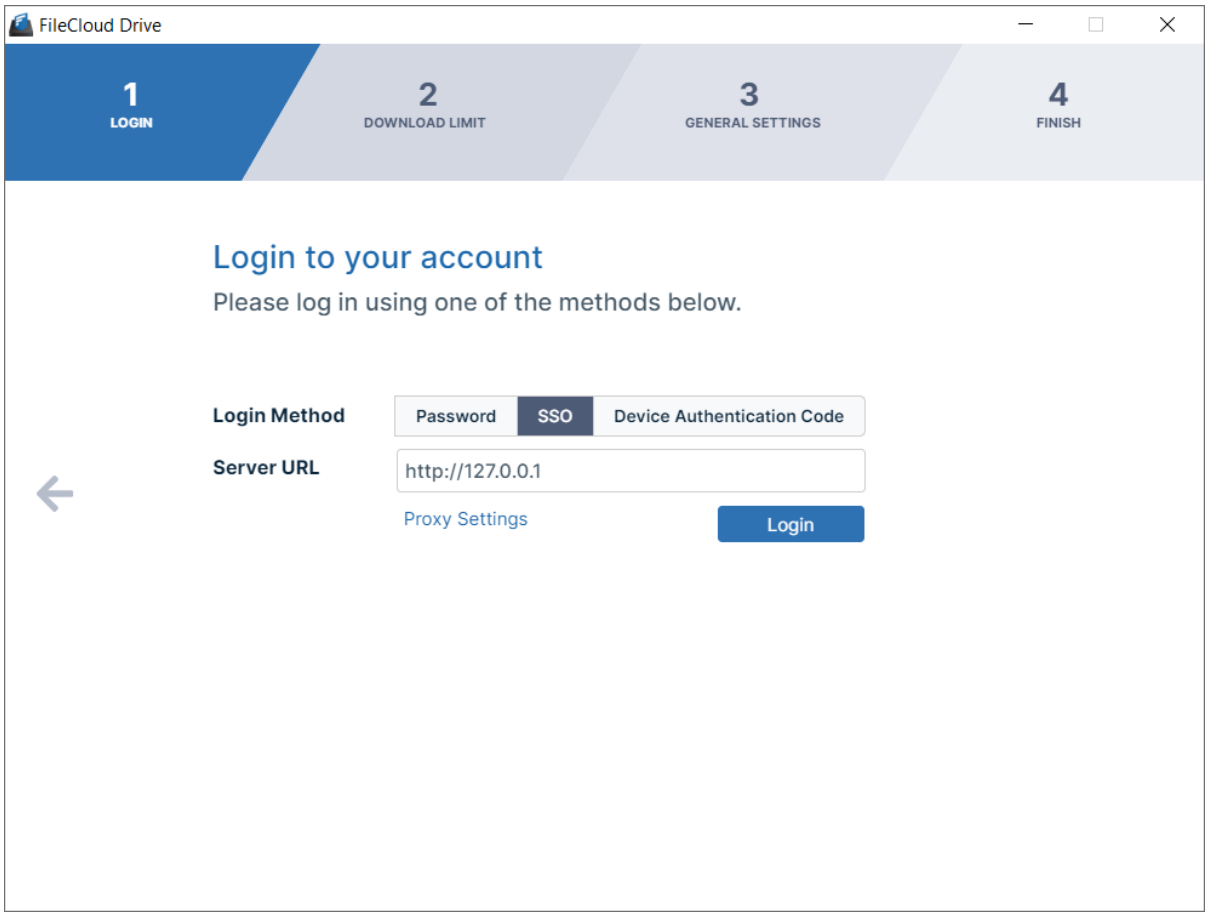
Related topics

Log In Using Single sign-on (SSO)

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

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

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



To login to FileCloud using SSO:

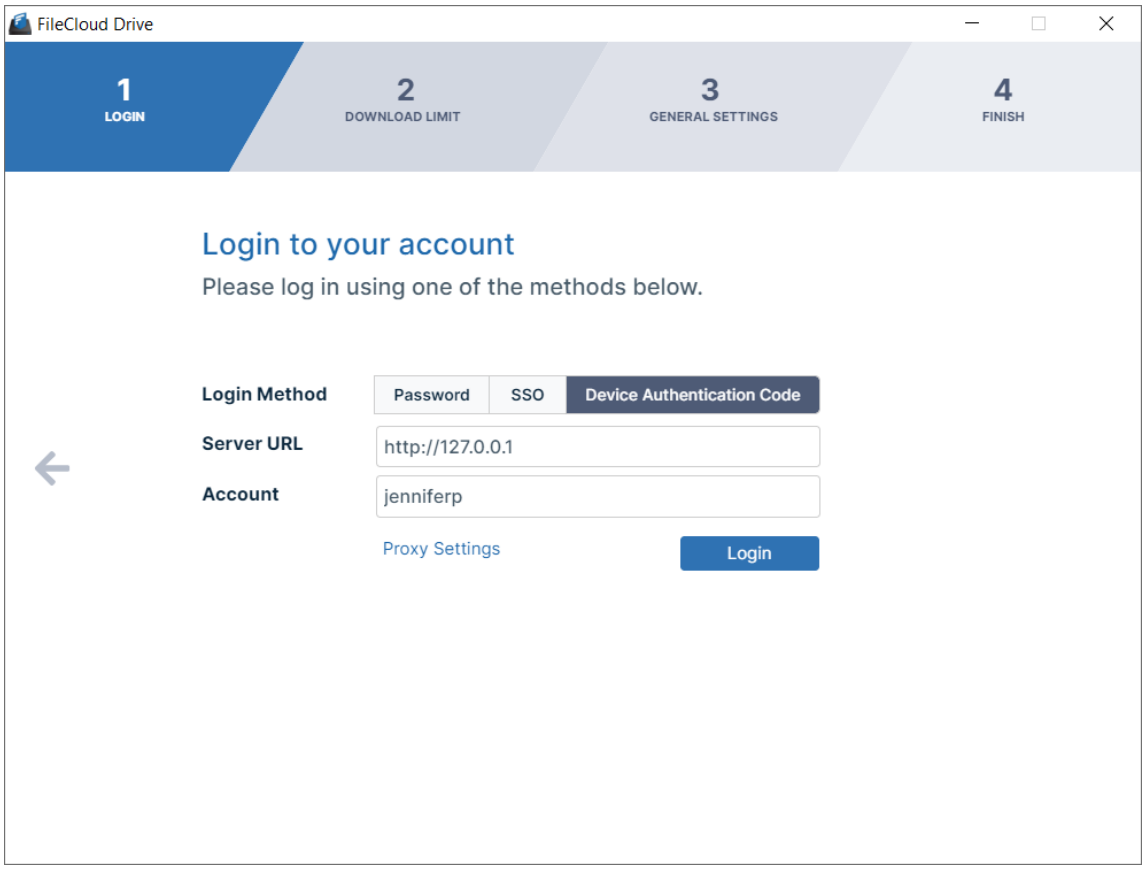
1. In the **Login** screen of the Drive wizard, for **Login Method**, click **SSO**.
2. In **Server URL**, enter your FileCloud address.
3. Click **Login.**
   You are logged in and taken to the next Drive wizard screen, **Download Limit**.

Using Code Based Authentication for Drive

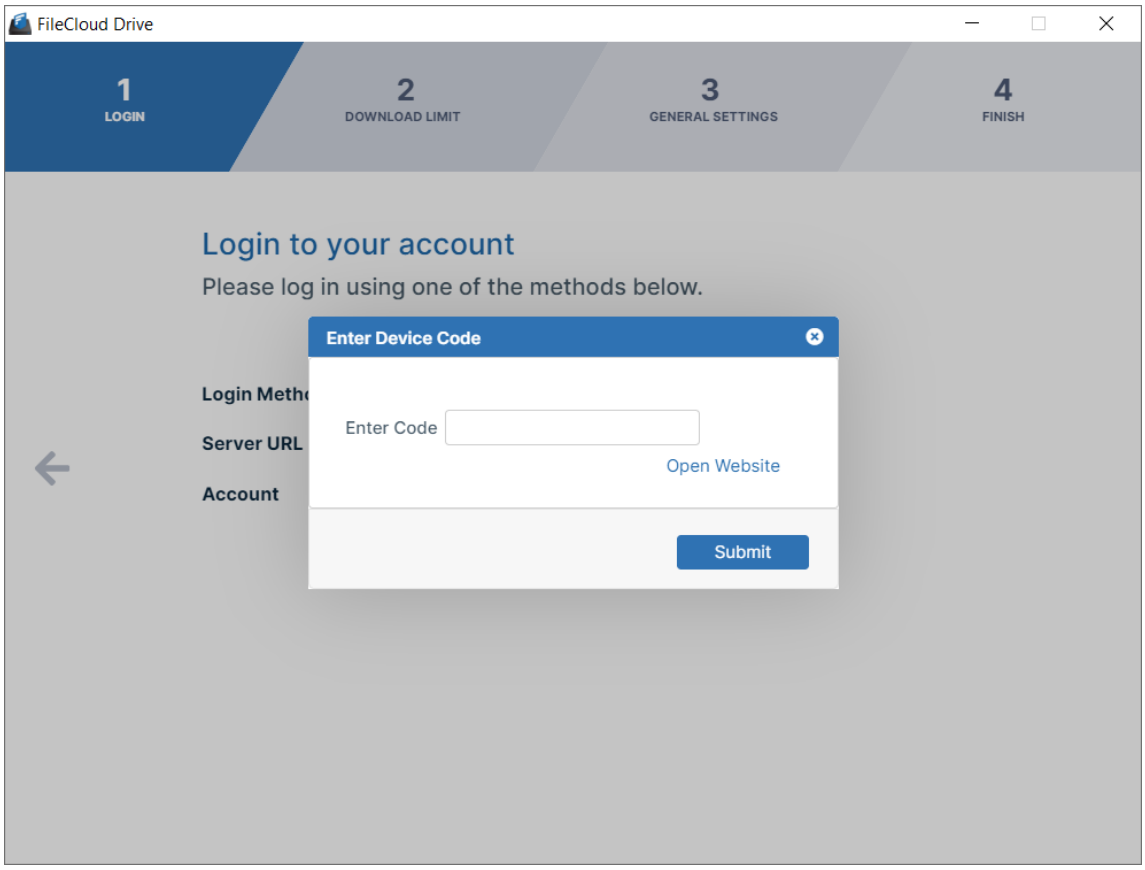
Your Administrator may require you to log in with a code instead of a user name and password.

To login to the FileCloud Server using a code:

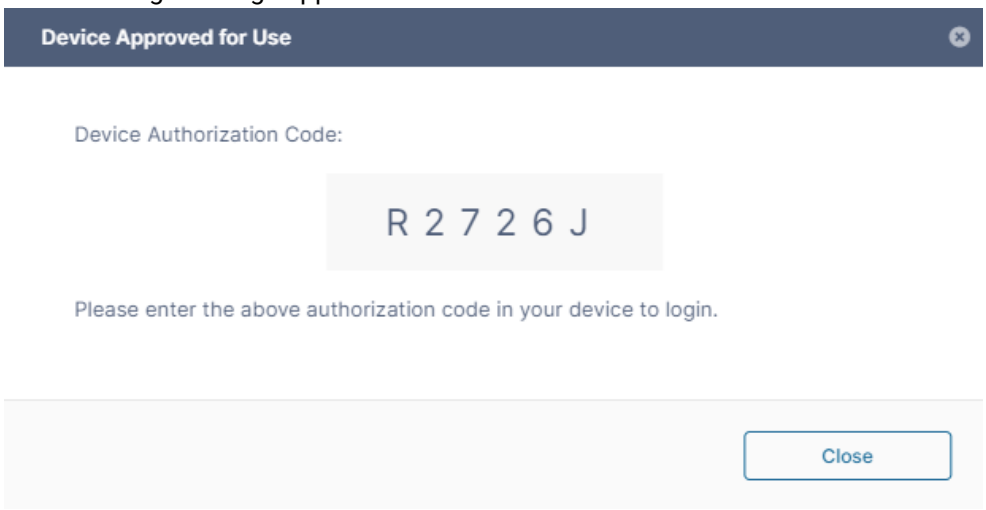
1. In the **Login** screen of the Drive wizard, for **Login Method**, click **Device Authentication Code**.
2. Type in the server URL and the user account name (or email).



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



5. Sign in to the FileCloud user portal, and go to Settings > Devices.
6. Approve the device.
   The following message appears:



7. Copy the **Device Authorization Code** and paste it into the authorization code field.
8. Click **Submit** to log in.
9. You are logged in and taken to the next Drive wizard screen, **Download Limit.**

FileCloud Drive Two-Factor Authentication

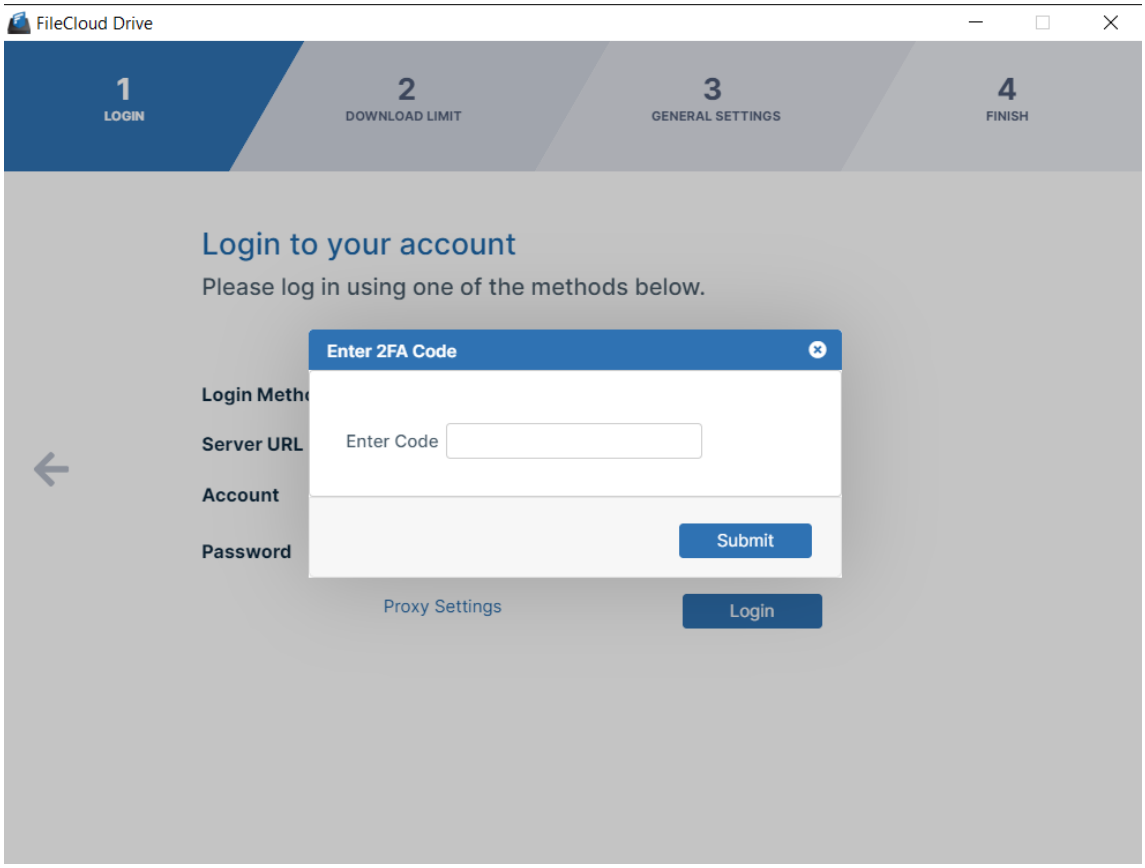
FileCloud Drive supports two-factor authentication (2FA) codes when your administrator enables 2FA in the FileCloud server.

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

💡 Two-Factor authentication codes are required if the device record is removed by your Administrator from the Device Management panel

To log in when 2FA is enabled:

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



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

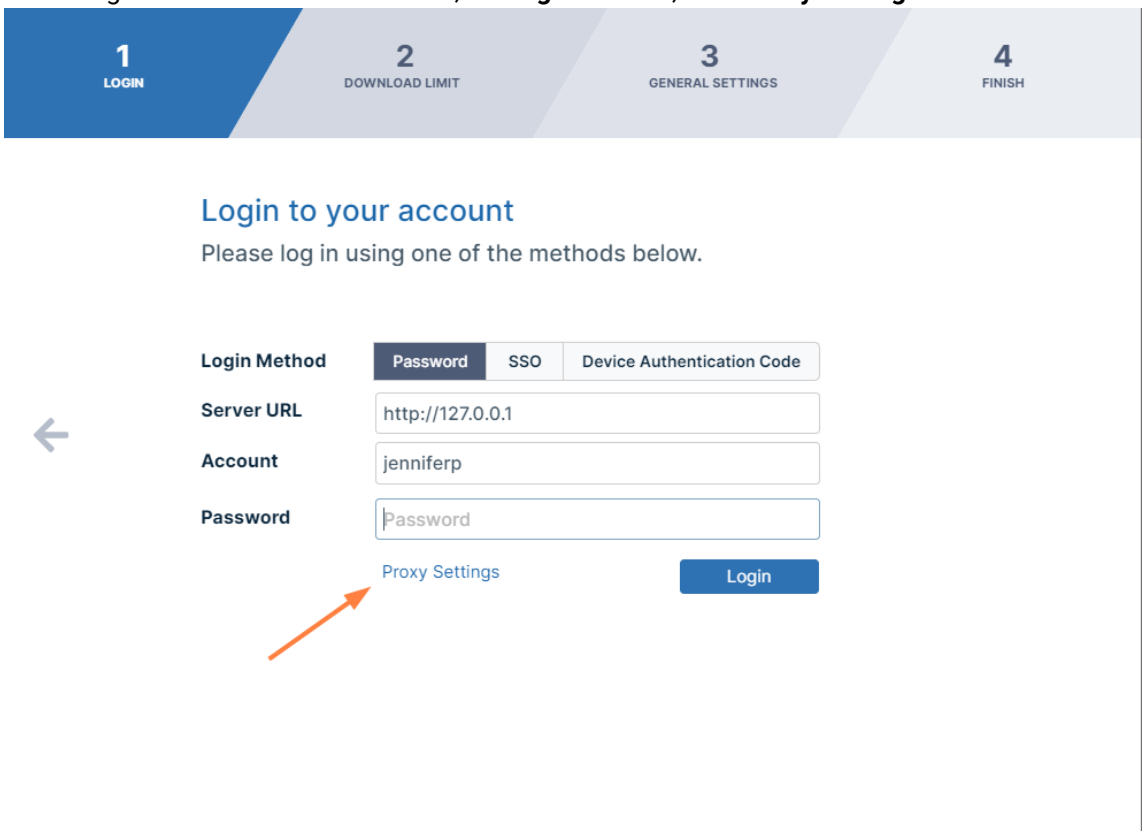
1. Enter the code, and click **Submit**.
2. You are logged in and taken to the next Drive wizard screen, **Download Limit**.

Proxy server for FileCloud Drive

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

To enter proxy settings:

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



   The **Proxy Settings** dialog box opens:.
2. Fill in the proxy settings and click **Save**.
3. Click **Login**.
4. You are logged in and taken to the next Drive wizard screen, **Download Limit**.

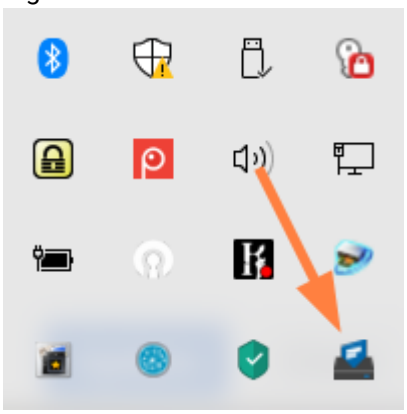
FileCloud Drive System Tray Options

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

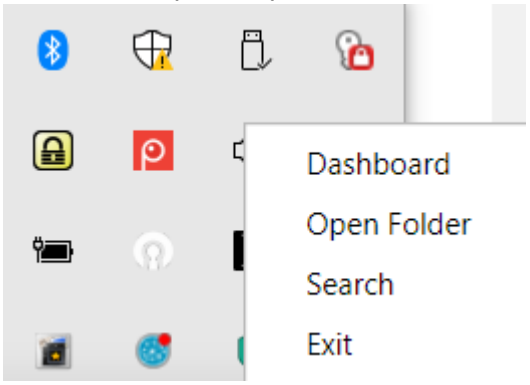
To open the right-click menu:

1. In the lower right corner of your Windows desktop, open the system tray.

2. Right-click on the FileCloud Drive icon.



The menu of options opens:



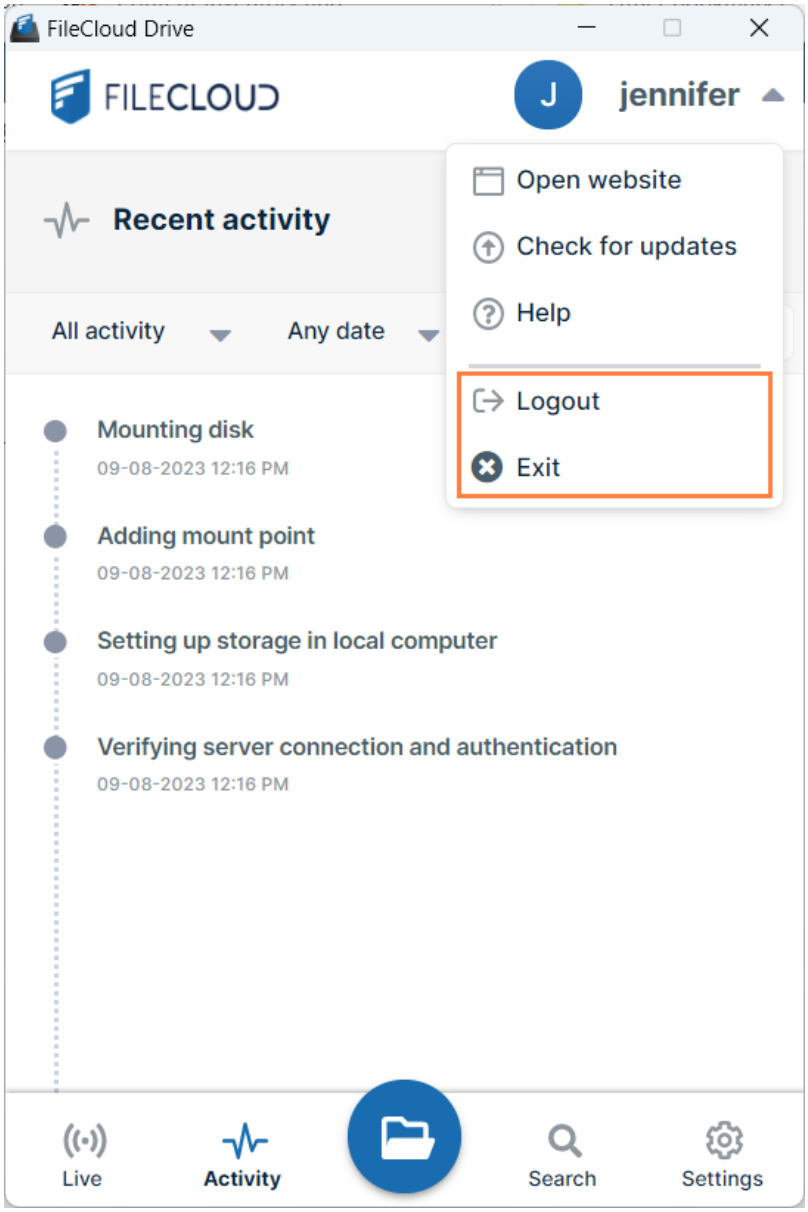
Option	Description
Dashboard	Opens a window of FileCloud Drive activity and settings.
Open Folder	Launches an explorer window that displays the contents of the mounted drive volume. If the remote server is not available or configured then nothing is launched.
Search	Opens a FileCloud Drive Search window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

Exit or Log Out of Drive

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

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

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

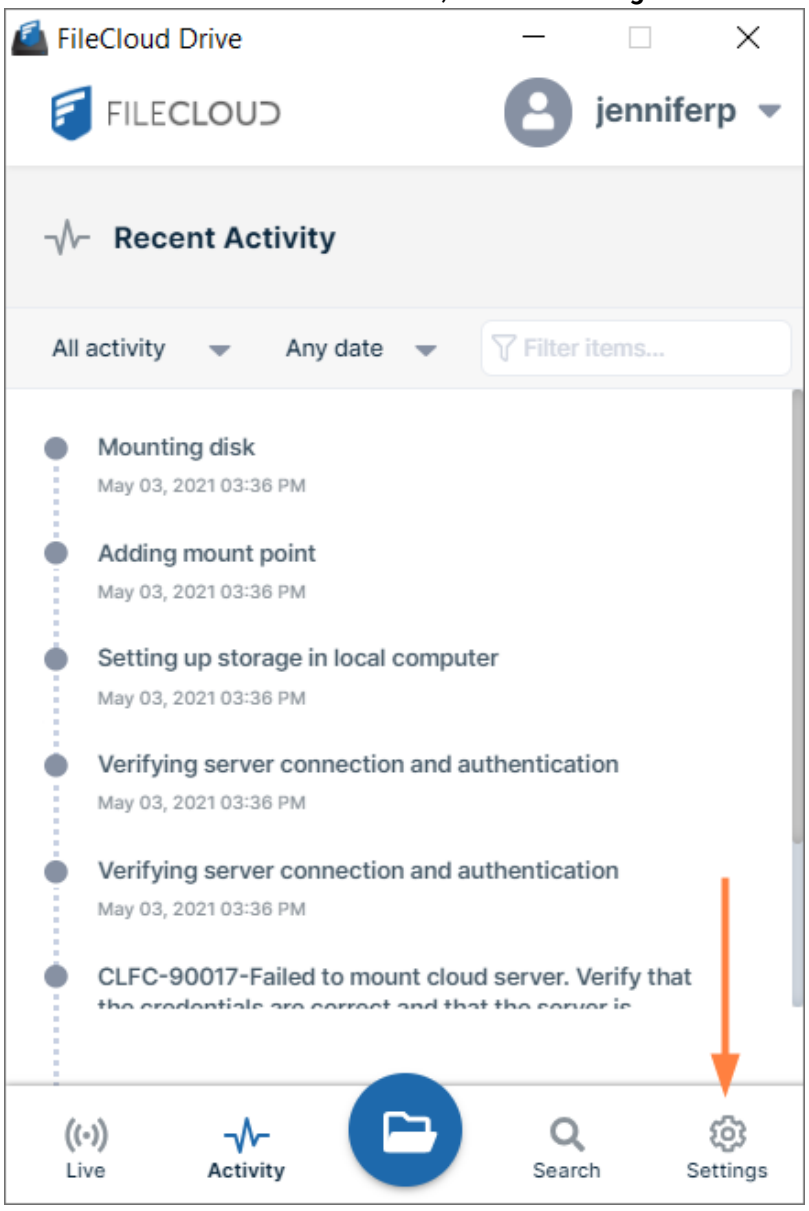


Settings

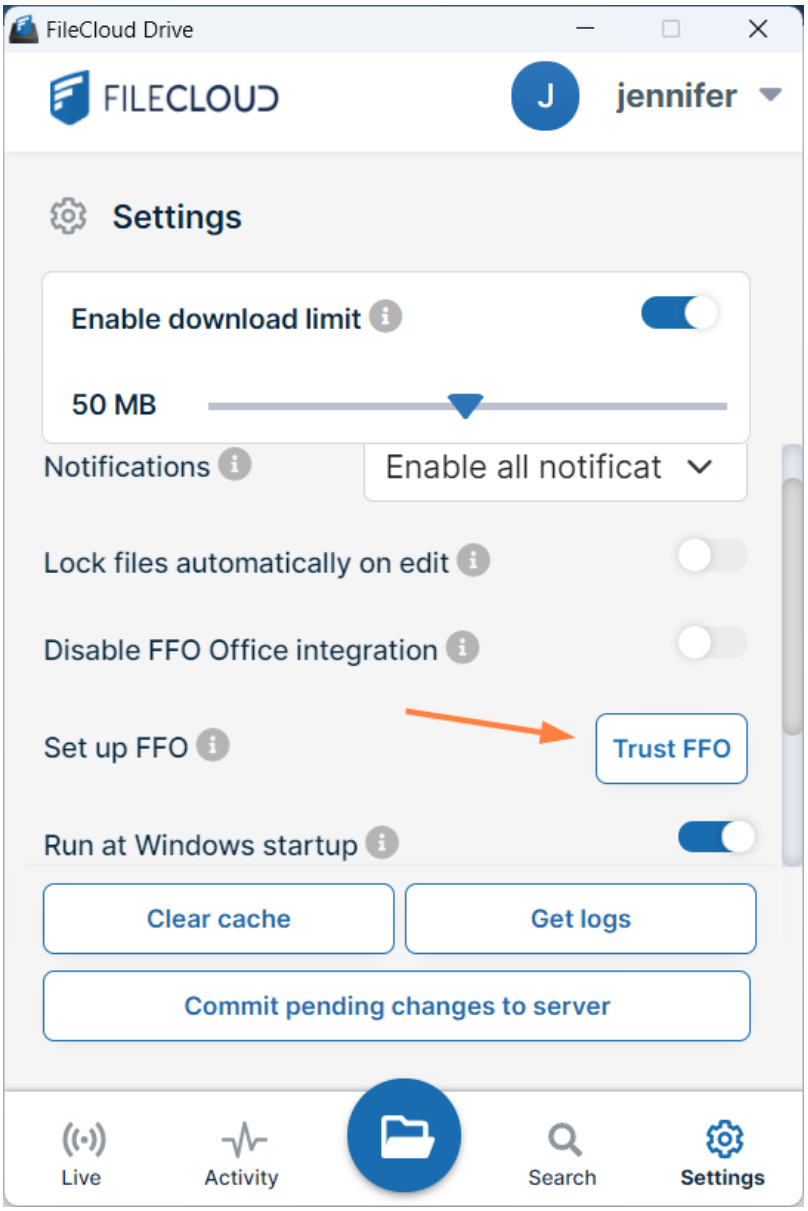
To change settings for FileCloud Drive:

1. Log in to Drive.

2. At the bottom of the Drive dashboard, click the **Settings** button.

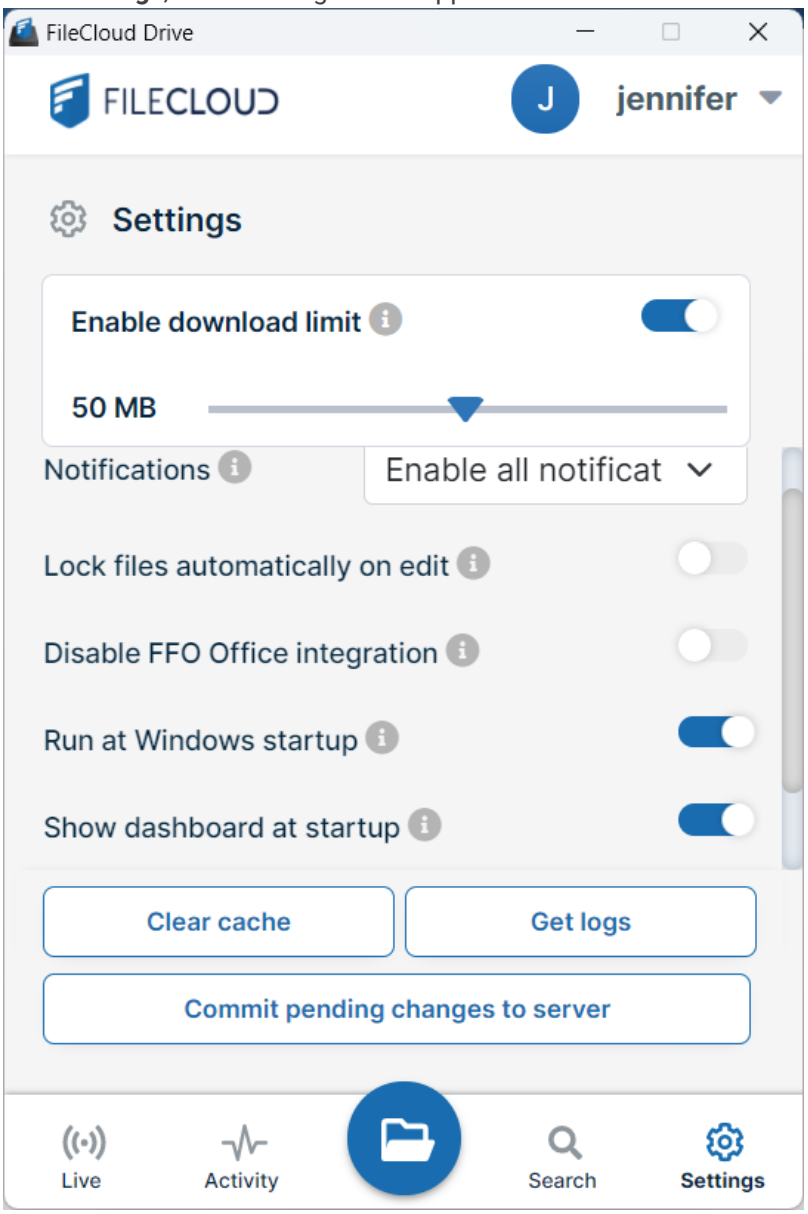


The Settings screen of the dashboard opens. The first time you open it after installing, a **Trust FFO** button appears (unless you have chosen to continue to use docIQ.)



After you click **Trust FFO** once, it does not appear on the settings screen again. Now when you

click **Settings**, the following screen appears.



3. Change any settings.

For more information about the settings, click or expand the links below:

Enable and set the download limit

FileCloud Drive sets a limit on the size of files you can download (with exceptions for some file types) to 50MB by default.

> File types that this limit does not apply to are: .txt, .rtf, .doc, .docx, .xls, .xlsx, .ppt, .pptx, and .indd.

This default limit is set for the following reasons:

- FileCloud Drive must download a file from the server before it can be read, modified, or updated.
- Windows can pre-fetch files to improve user experience and can request files that are not actively used.
- This activity can sometimes cause heavy bandwidth usage.
- To limit this, FileCloud Drive has a maximum file size limit setting to prevent downloading large files.

To change the download limit size, slide the pointer to the left or right.

To disable the download limit, click the **Enable download limit** slider until it appears gray.

Notifications

The default setting is **Enable all notifications**, which enables display of both Drive system toast notifications and floating status notifications.
You may change the setting to:
Mute all notifications - Disables display of both system toast and floating status notifications. ***Note:*** *File transactions and important notifications may be missed.*
Mute system notifications - Disables display of system toast notifications, but enables display of floating status notifications.
Mute app notifications - Disables display of floating status notifications, but enables display of system toast notifications. ***Note:*** *File transactions and important notifications may be missed.*

Lock files automatically on edit

Lock files automatically on edit

Use the automatic lock feature to lock a file on the FileCloud server while it is being edited by one user to prevent another user from editing it at the same time.

By default, the automatic lock feature is disabled. To enable it, click the **Lock files automatically on edit** slider.

Note that only certain types of files can be automatically locked. For more information, see Automatic Locking in FileCloud Drive.

Disable FFO Office integration

If you have installed FileCloud for Office, the first time you log in and view settings, a **Set up FFO** label and a **Trust FFO** button appears. You must click the **Trust FFO** button to install the certificate for FFO. This removes the **Set up FFO** label and **Trust FFO** button from **Settings**. They will not appear again. However, to use FFO, you are still required to include the FFO add-in.
FileCloud for Office is enabled by default. To disable it, click the **Disable FFO Office Integration** slider so that it turns blue.

Run at Windows Startup

By default, FileCloud Drive is run on Windows startup. To prevent Drive from automatically running on startup, click the **Run at Windows Startup** slider so that it turns gray.

Show Dashboard At Startup

By default, when FileCloud Drive starts, it automatically displays the dashboard. To prevent Drive from automatically displaying the dashboard when it starts, click the **Show Dashboard At Startup** slider so that it turns gray.

Clear Cache

If Drive is not displaying updated information or is running slowly, clear your cache by clicking the **Clear Cache** button.

Get Logs

To open the folder that stores Drive log files, click the **Get logs** button.

Commit Pending Changes to Server

If you experience a lag between the time you perform an action and the time it is committed it to the server, click **Commit Pending Changes to Server** to commit the changes to the server now.

Automatic Locking in FileCloud Drive

Automatic locking is only supported for certain file types in Drive. When you open file types that do not have automatic lock support, you must manually lock them to ensure that Drive does not attempt to upload them while they are being edited.

Automatic locking of Adobe and Quickbooks files

In Drive in Windows, automatic locking is supported for the following file types:

- Microsoft Word
- Bluebeam Revu
- Adobe InDesign
- Adobe Illustrator
- Microsoft PowerPoint
- Microsoft Excel
- Corel WordPerfect
- Quickbooks
- AutoCAD

To enable the automatic lock feature, see Settings#Lock-files-automatically-on-edit.

Working in FileCloud Drive

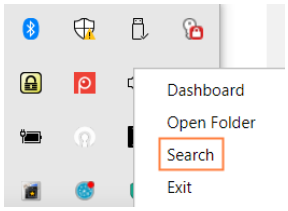
In this section:

Searching in Drive

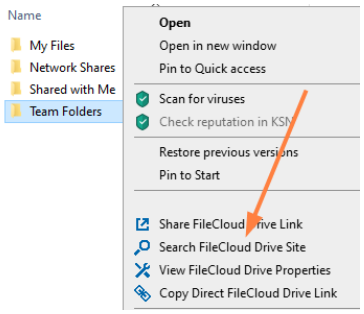
How do I access the search window?

Initiating search from the Drive system tray

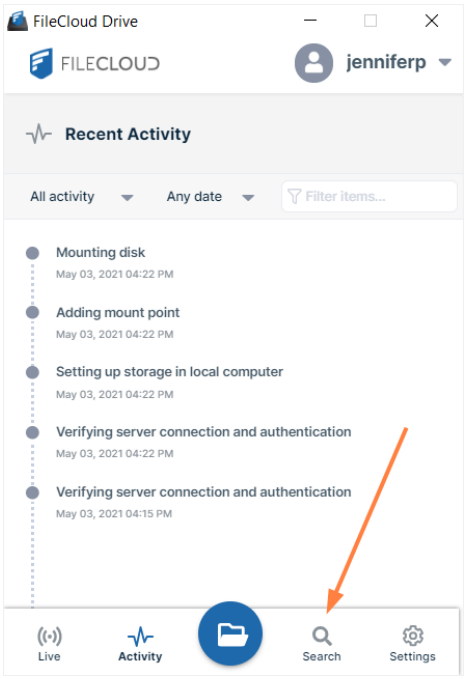
The taskbar Search option opens the basic Search UI with the default search path.



Initiating search from the Drive folder



Initiating search from the dashboard



Basic and Advanced Search

Basic search view	Advanced search view

Enter a search term, and click **Enter**. The files and folders returned are listed in the lower portion of the Search window.

By default, file names, content, and metadata are searched. To include folders in the search or to filter the search, click **Show advanced options**.

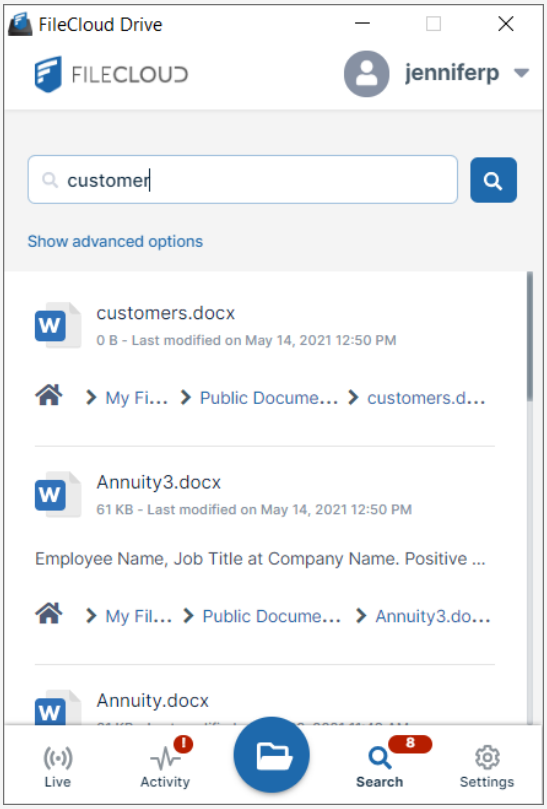
The number of items found appears in the red oval near the Search icon at the bottom of the view.

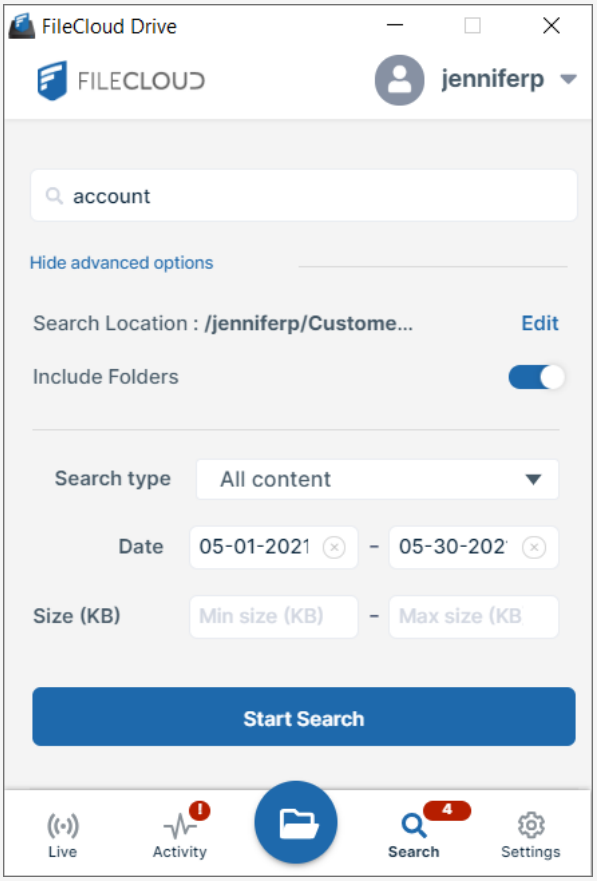
Click **Show advanced options** in the basic search to view the advanced options fields. Configure any of the advanced options:

- **Search Location** - Click **Edit** and navigate to the folder path that you want to search
- **Include Folders** - Toggle the button to include folders as well as files in the search
- **Search type** - **All content** (default), **Name only**, **Content only**, or **Metadata**
- **Date** - Enter a date range
- **Size (KB)** - Enter a size range

Click **Start search** to begin the search. The results appear in the basic search view.

The number of items found appears in the red oval near the Search icon at the bottom of the view.

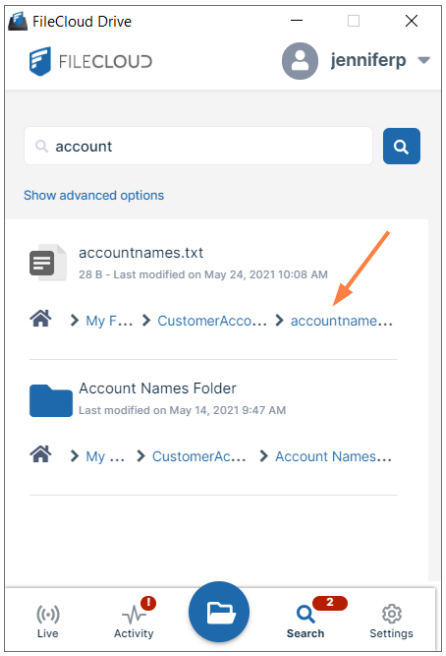




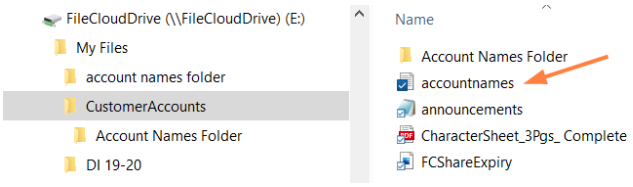
Accessing items after searching

After your search results are returned, you can access any location in the item's path in content explorer by clicking on it.

Click here:



To open here:



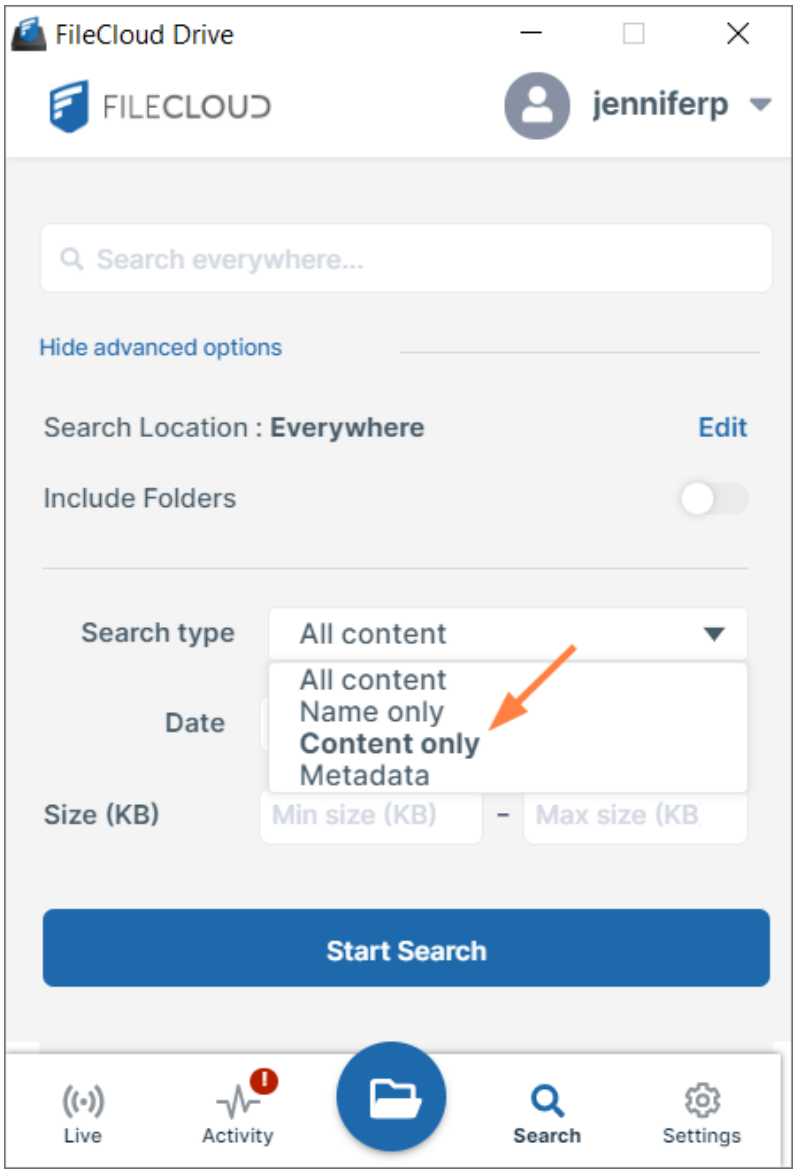
Also see:

Content Search in Drive

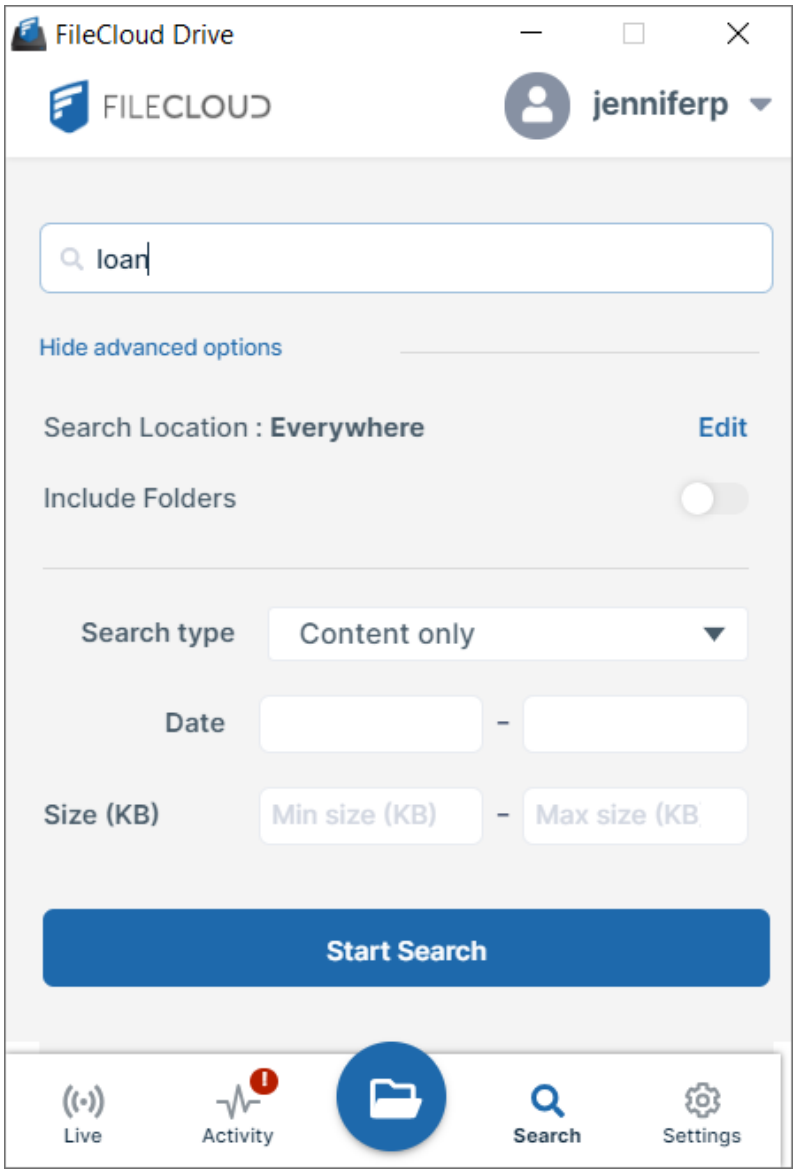
Content search enables you to search through the text in file types such as txt, pdf, doc, docx, xls, xlsx, ppt, pptx. Search results display the matching term in bold.

To perform a content search:

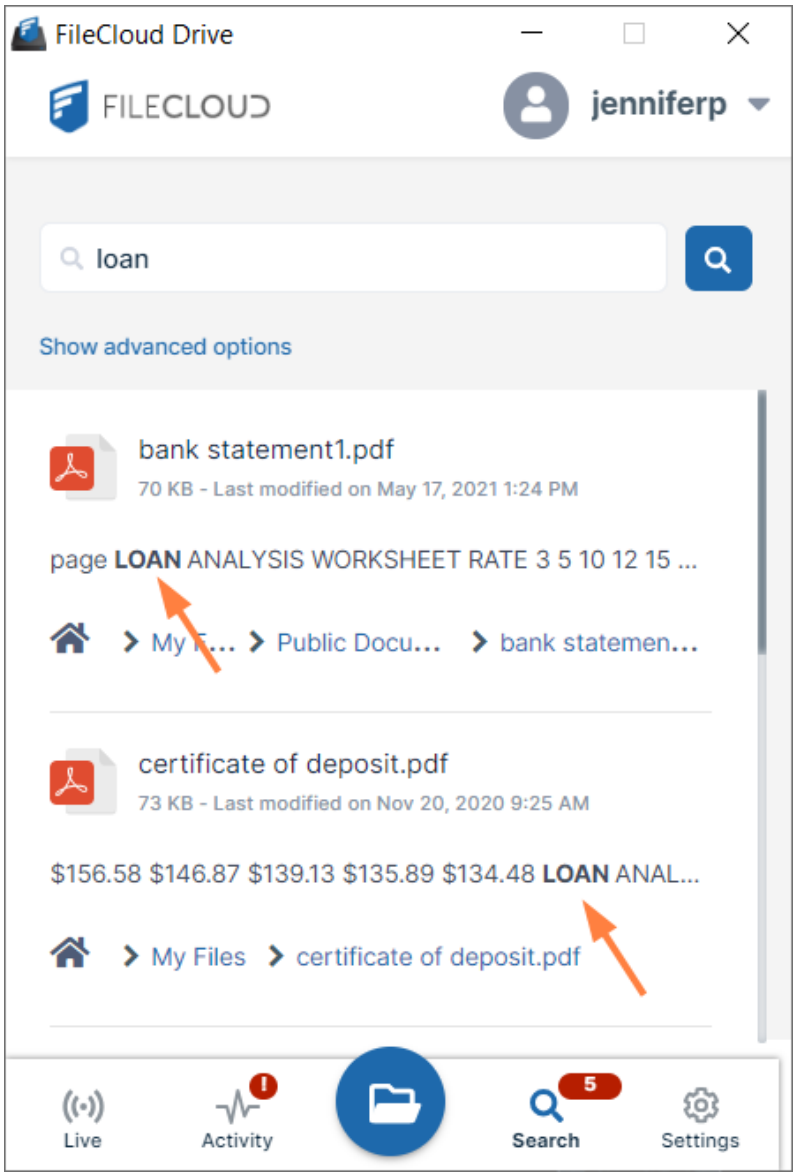
1. Access the Search window in Drive.
2. Click **Show advanced options**.



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



5. Click **Start Search**.
   The search returns files that include the search term in their content. The phrase including the search term appears in bold.



Metadata Search in Drive

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

To search on metadata:

1. Open the Search window in Drive.
2. Click **Show advanced options**.
3. Choose **Metadata** as the **Search type** and define search conditions.

   This video shows you how:



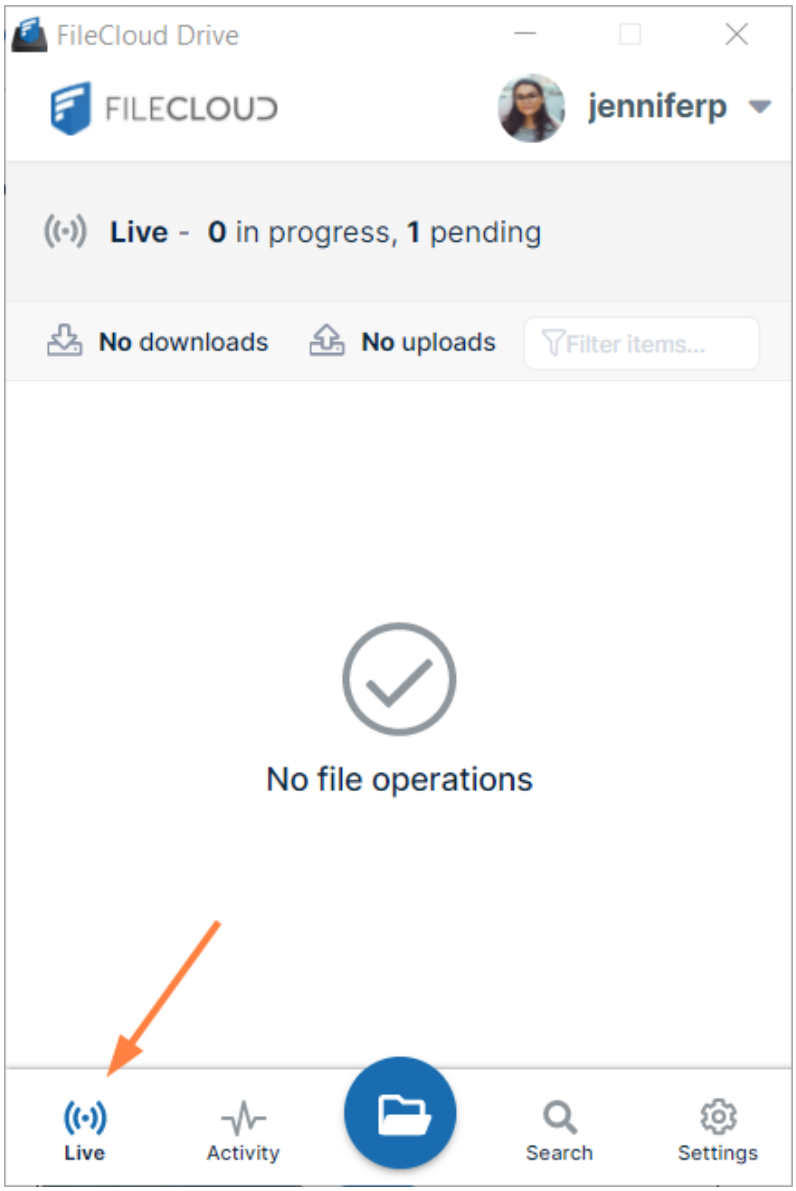
Viewing FileCloud Drive Activity

The ability to cancel pending and in progress downloads and to view a count of pending downloads is available in FileCloud version 21.3 and later.

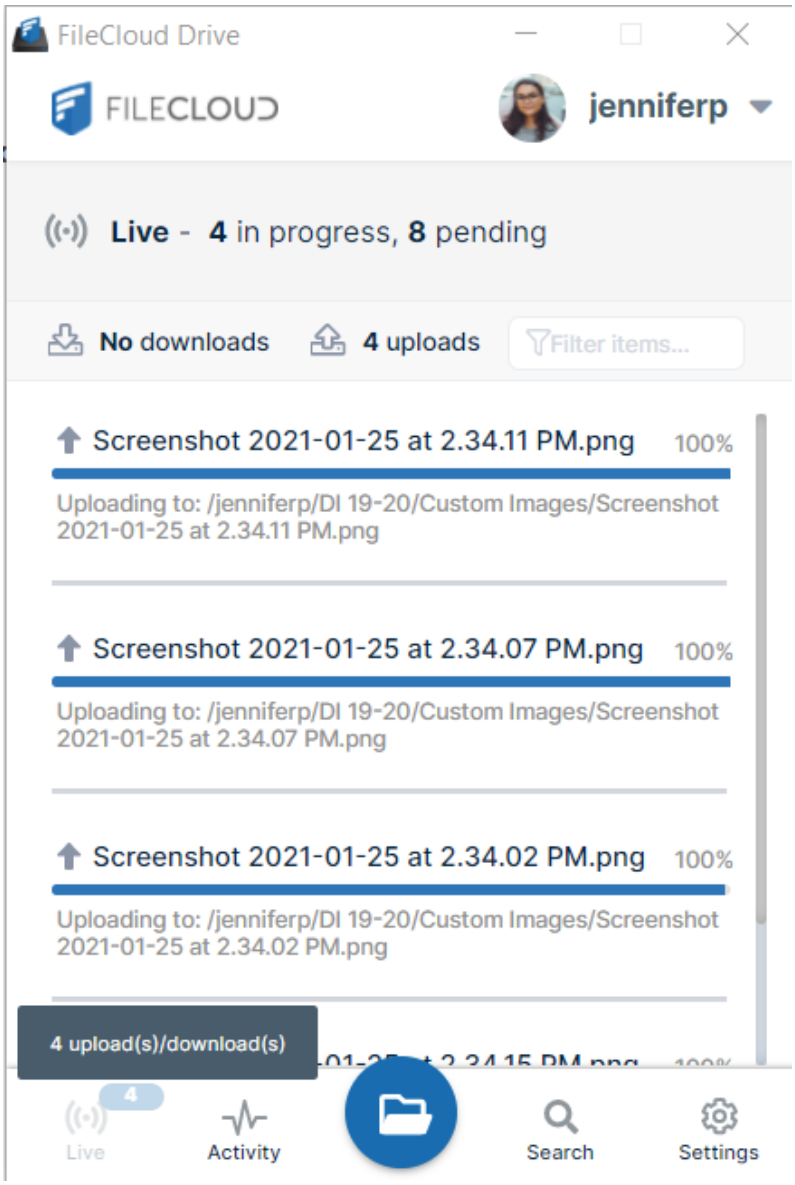
You can view live activity as well as the history of recent activity in FileCloud Drive.

To view live activity in Drive:

1. Log in to Drive, or in the system tray, right-click on the Drive icon, and choose **Dashboard**. Click the **Live** button at the bottom of the page.



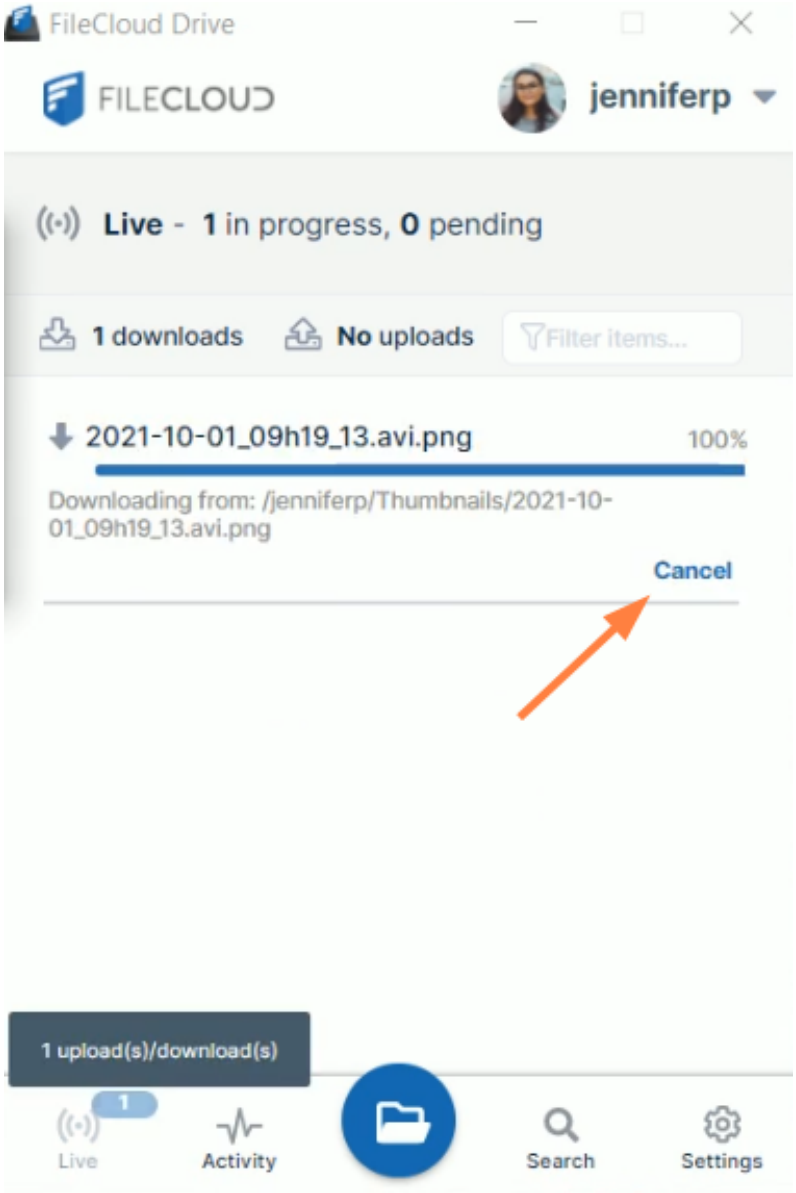
The number of uploads and downloads pending and in progress appears at the top of the dashboard.
While uploads and downloads occur, their progress is shown on the dashboard.



To cancel pending or in-progress downloads in Drive:

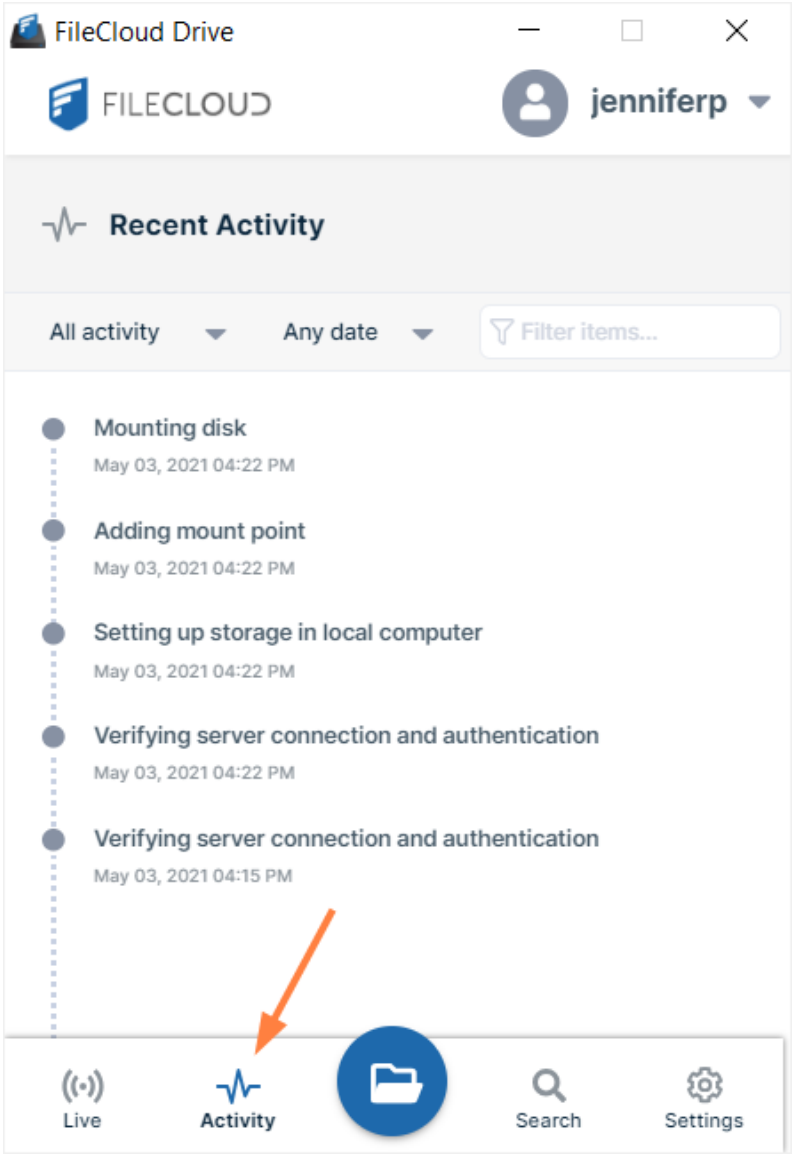
While a file's download is still in progress, a cancel button appears to its right on the Drive dashboard.

- Click the **Cancel** button to cancel the download.



To view recent activity in Drive:

1. Log in to Drive, or in the system tray, right-click on the Drive icon, and choose **Dashboard**. If the dashboard does not display the **Recent Activity** screen, click the **Activity** button at the bottom of the page.



Sharing Files in Drive

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

Sharing files allows you to:

- Keep track of who you have shared a file with
- Add comments about the file
- Monitor file versions
- Control changes people make to the file or folder by setting a combination of permissions to read, view, modify, copy, or delete it

You can share a file in many different ways.

	Requires a FileCloud Account	Set Permissions	Set Options	Share with Everyone	Share with a Specific User
Public	✗ Anyone with the link can access	✓ View ✓ Download ✓ Share	✓ Share Name ✓ Expiration ✓ Restrict Downloads ✓ Notifications ✓ Require Password	✓	✓
Private	✓ Invite those without an account to create one	✓ View ✓ Download ✓ Share	✓ Share Name ✓ Expiration ✓ Notifications	✗ Add Groups of multiple user to share with	✓ With a FileCloud account

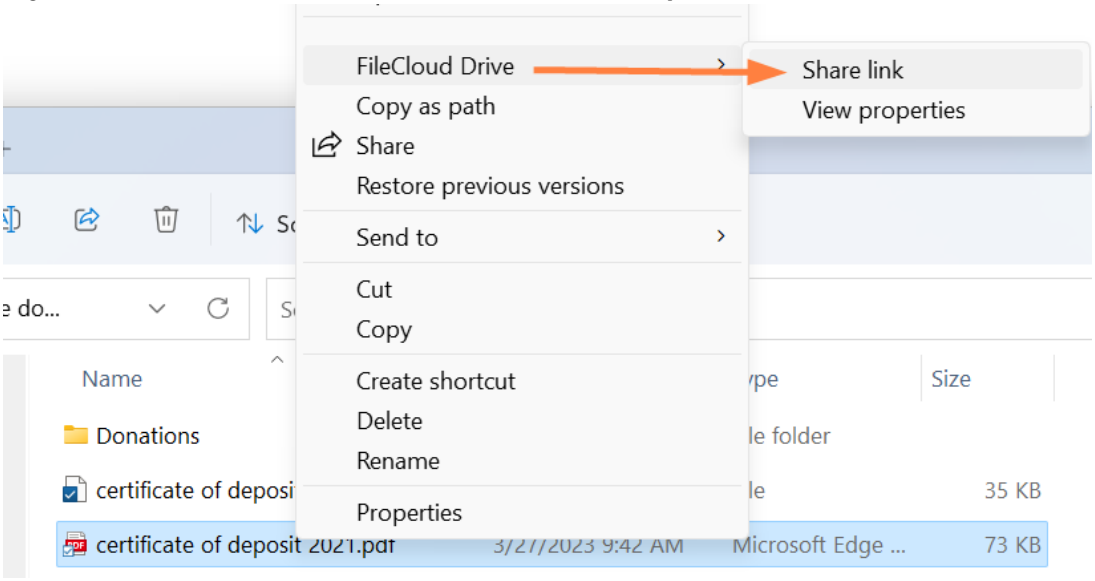
Sharing Files or Folders Publicly in Drive

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

If you want more security but still want a large number of people to access the file, you can enable password protection.

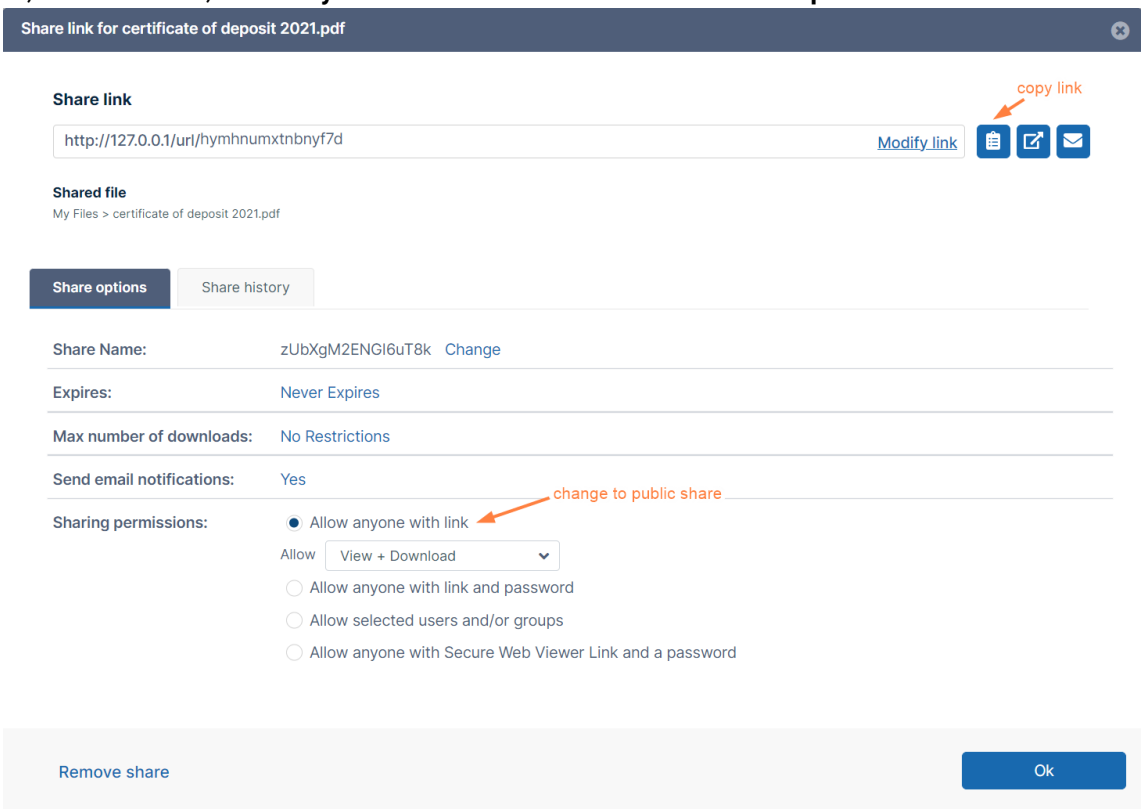
Create a public share:

1. Open your Drive folder and navigate to the file or folder that you want to share.
2. Right-click on the file or folder and choose **Show More Options > FileCloud Drive >Share Link**.



The **Share Link** dialog box opens. By default the share is private.

3. Under **Sharing permissions**, click **Allow anyone with link**, **Allow anyone with link and password**, or, if it's available, **Allow anyone with Secure Web Viewer Link and a password**.



4. Change any of the options under **Share options**.
   The **Max number of downloads** setting is available for files but not for folders.
   See Public Share Options for Files or Share Options for Public and Private Folders for help changing the settings.
5. If you click **Allow anyone with link and password**, the share is still public, but requires users to enter the password shown.
   You may change the password, and click **Save** to save it.
6. Click the **Copy link** button to paste the link (and password if it exists) in a message and send it to users to give them access to the shared file
   OR
   Click the **Email link** button to open an email message that includes the link (and password if included). Fill in the addresses of recipients you want to send the email to.

For information about additional options and settings when sharing files and folders, see Sharing Files and Folders

Sharing Files or Folders Privately in Drive

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

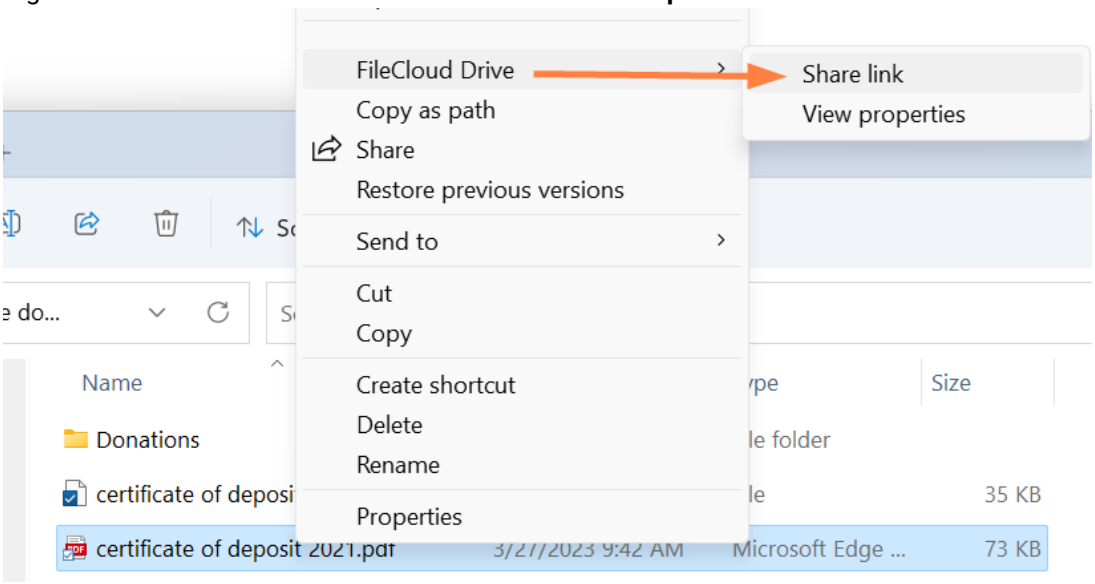
Sharing files or folders privately:

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

To share files or folders privately with users or groups

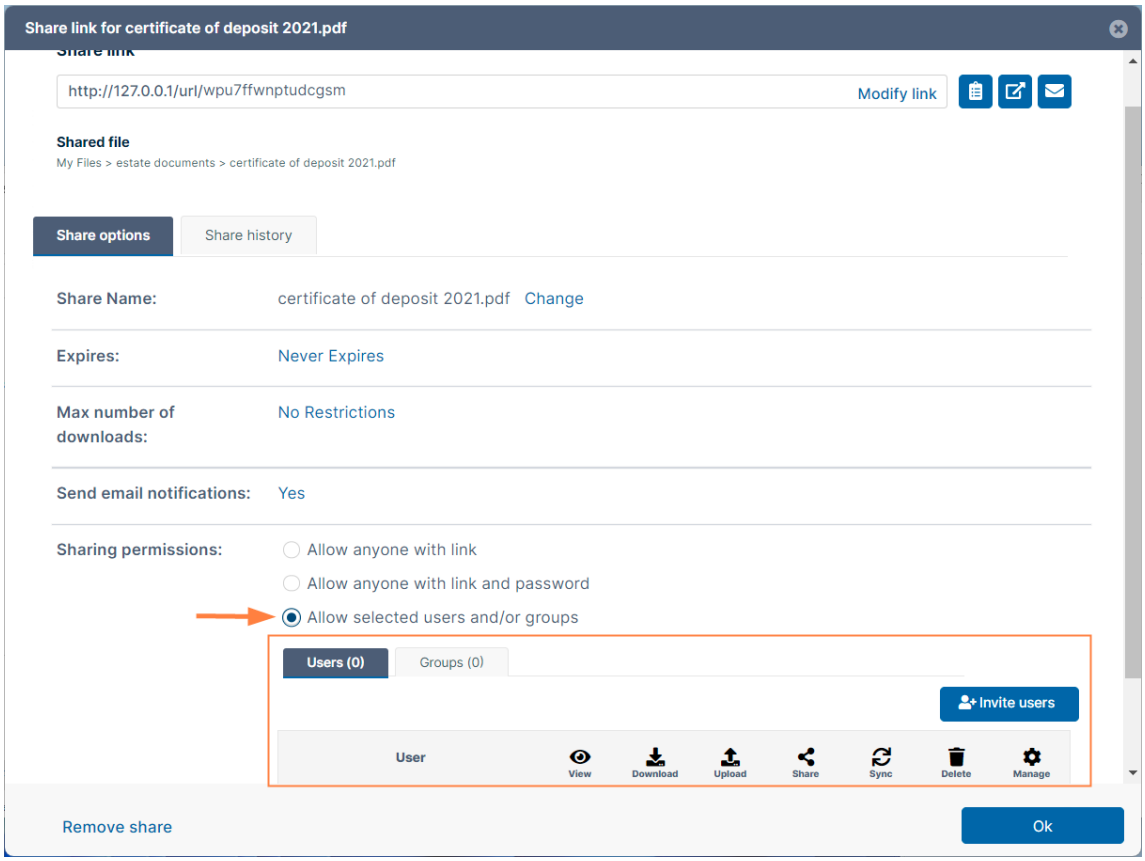
Share a file or folder privately with an existing or new user

1. Open your Drive folder and navigate to the file or folder that you want to share.
2. Right-click on the file or folder and choose **Show More Options > FileCloud Drive >Share Link**.

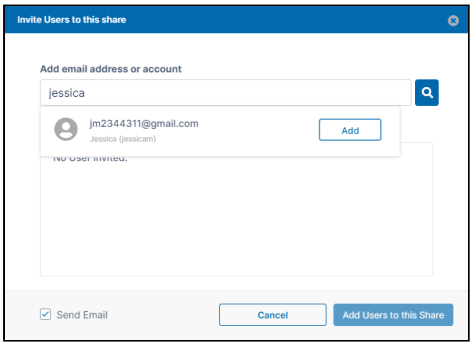


The **Share Link** dialog box opens.

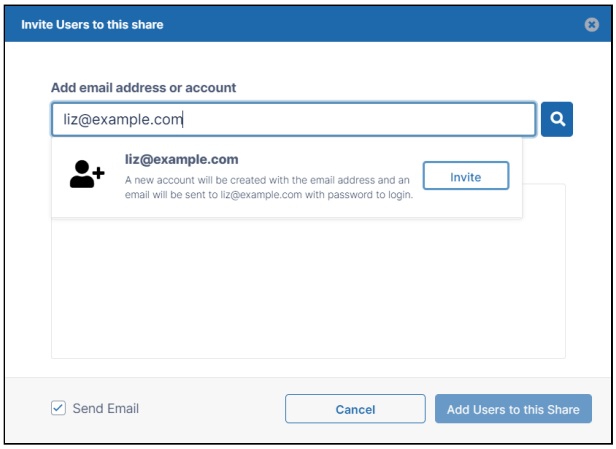
3. Change any of the settings under **Share Options.**
   See Private Share Options for Files or Share Options for Public and Private Folders for help changing the settings.
   The **Max number of downloads setting** is not available for folders.
4. In the **Sharing Permissions** section, click **Invite Users**.



5. Click **Invite Users**.
   An **Invite Users to this share** dialog box opens.
6. In the **Add email address or account** box, enter the email address or username of an existing user or a new user's email address.

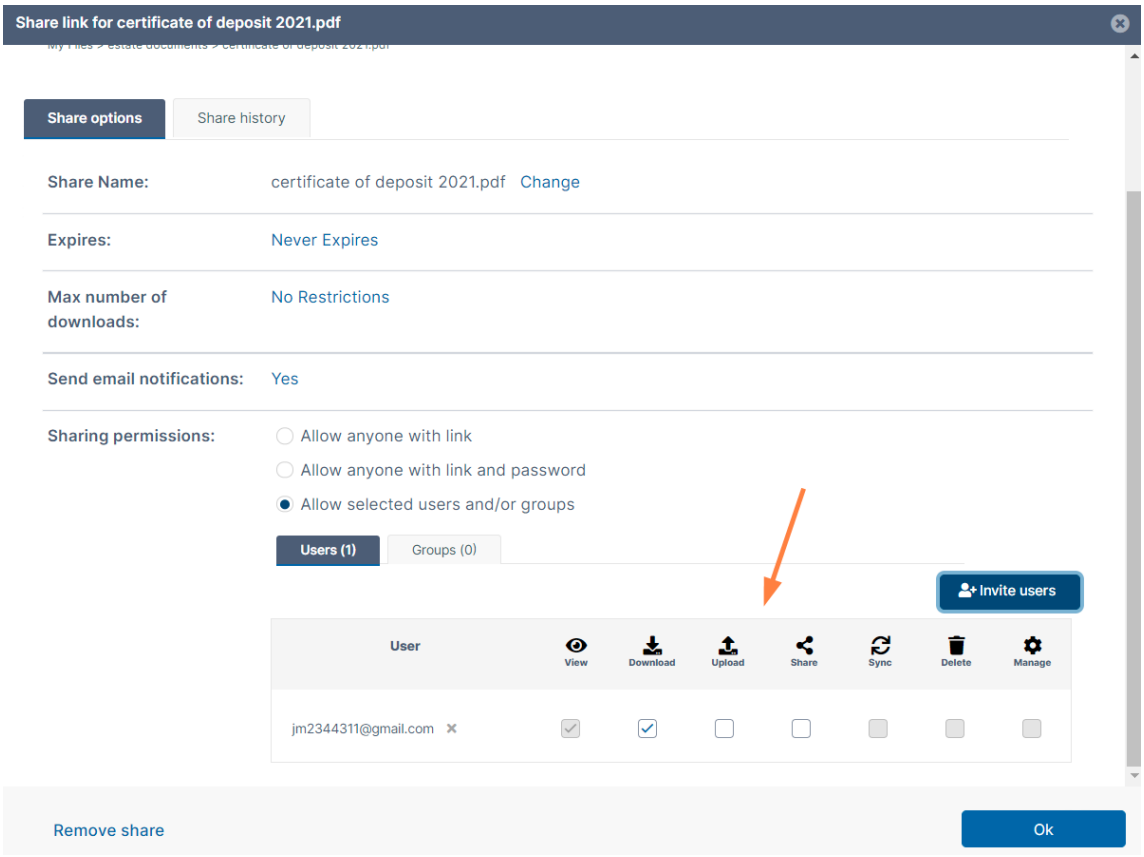


Adding an existing user.



Adding a new user: when you click **Invite**, an account is created for the user and the account password is sent to their email.

7. Click **Add** to add an existing user or **Invite** to invite a new user.
8. Add any number of share users. When you are done adding users, click **Add Users to this Share**. The users are added to the share and emails are sent to them with a link to the share. For information about sending and editing share emails to users, see Sending an email notification for a private share, below.
   For any new user(s) you have added to the share, a FileCloud account is automatically created for them and an email with the account password is sent to them.
   The **Users** tab lists the users with checkboxes for various types of permissions next to them.



View is selected by default, and cannot be edited.
The permissions available for files and folders are different. See Private Share Permissions for Files or Private Share Permissions for Folders for more information.

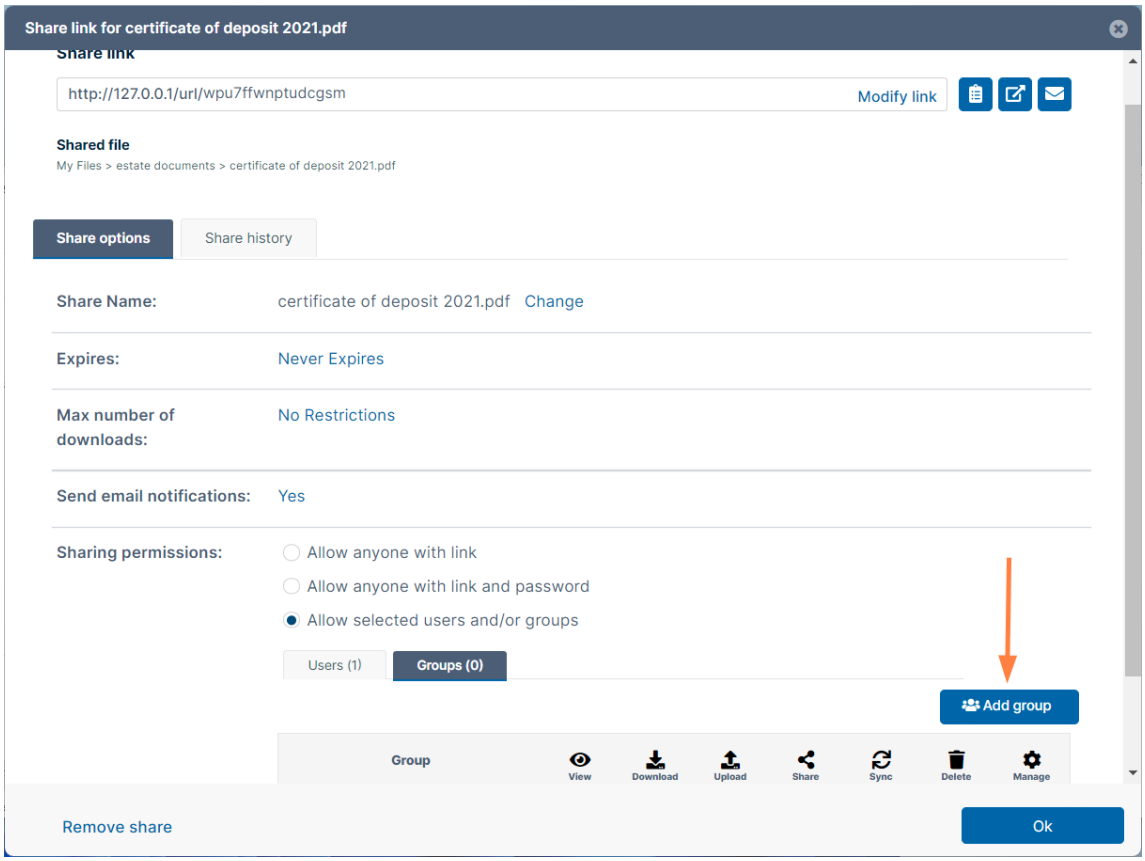
9. Change any of the permissions.
10. Click **OK**.

If you are not able to invite a new user to access your share, contact your administrator about allowing new user account creation. See Sharing Files Privately with New Users.

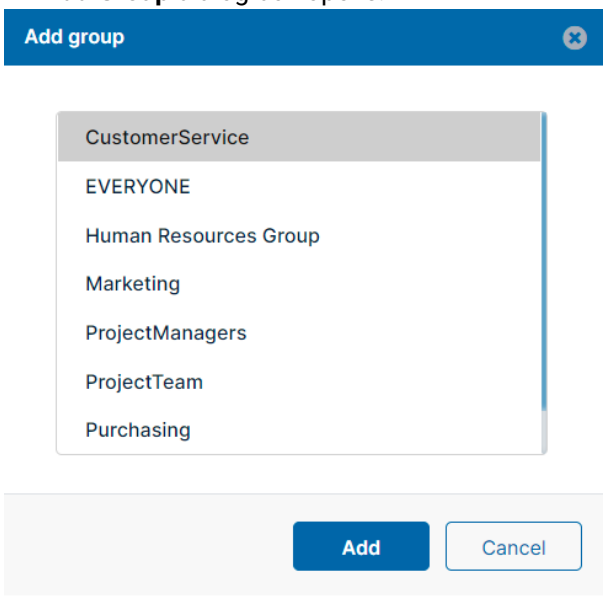
Sharing files or folders privately with a group

The procedure for sharing files or folders privately with a group is similar to sharing them privately with a user.

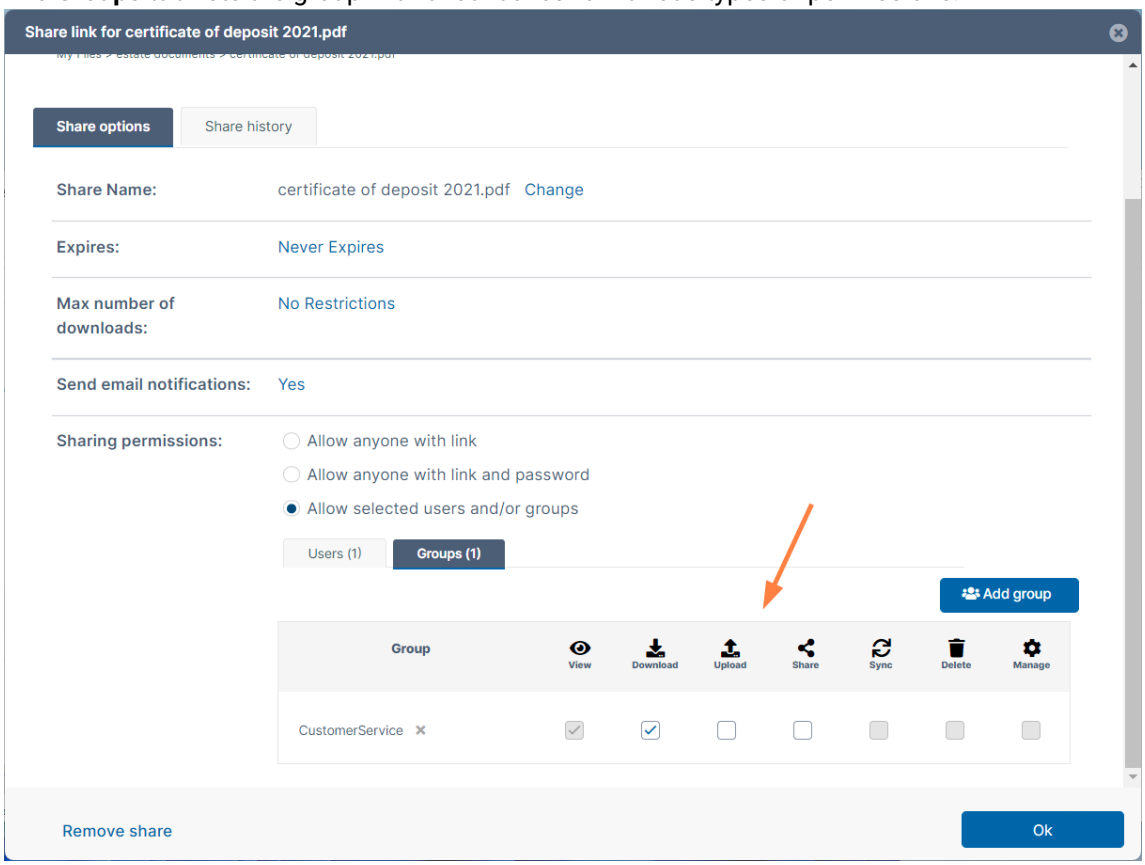
1. Follow steps 1 through 3, above, in Share a file or folder privately with an existing or new user.
2. In the **Share Links** dialog box, click the **Groups** tab.



3. Click **Add Group**.
   An **Add Group** dialog box opens:



4. Choose a group and click **Add**.
5. The **Groups** tab lists the group with checkboxes for various types of permissions.



6. **View** is selected by default, and cannot be edited.
7. Change any of the permissions.
8. Add any number of additional groups.
9. Click **OK**.

Sending an email notification for a private share

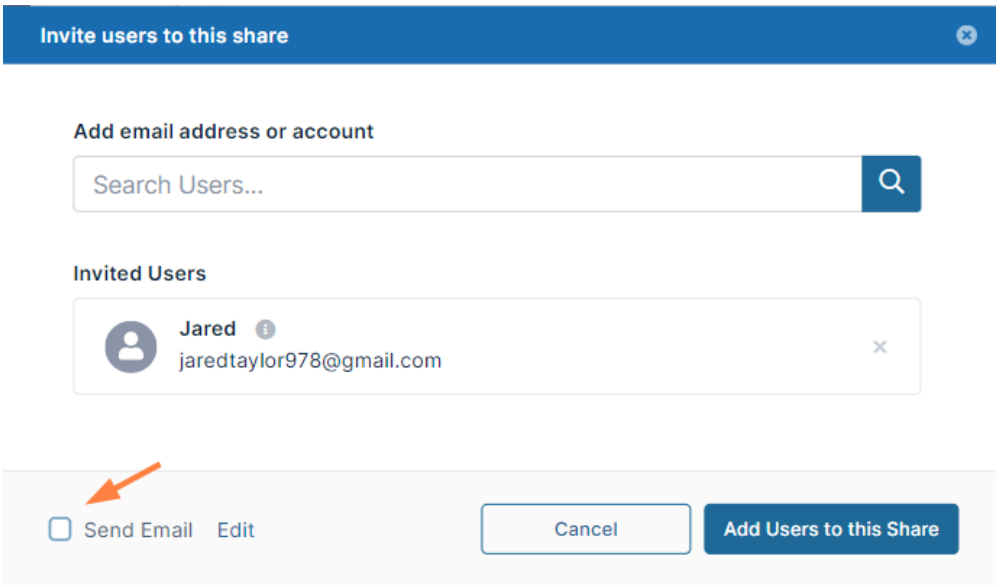
Sending an Email Notification for a Private Share

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

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

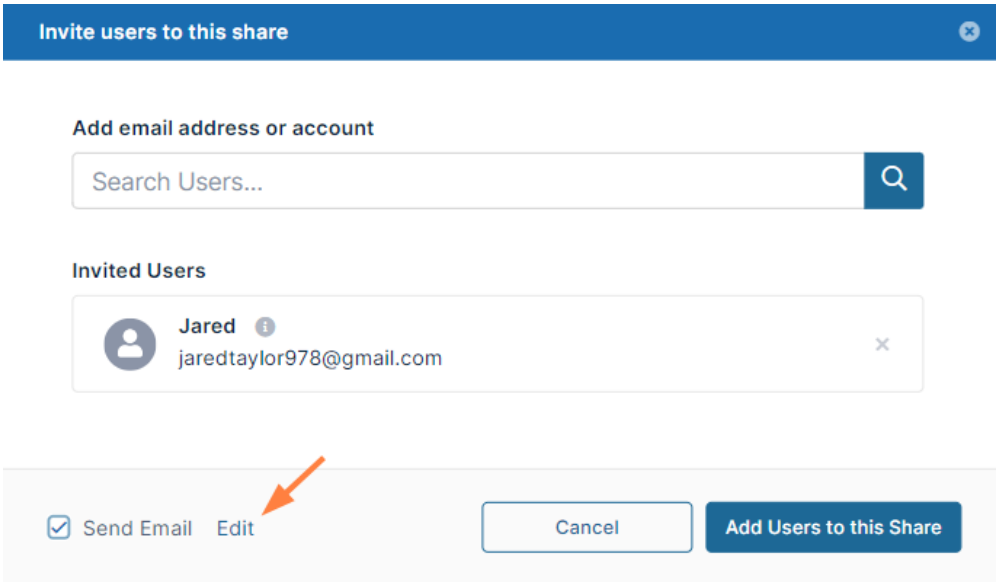
To not send the email to share members:

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

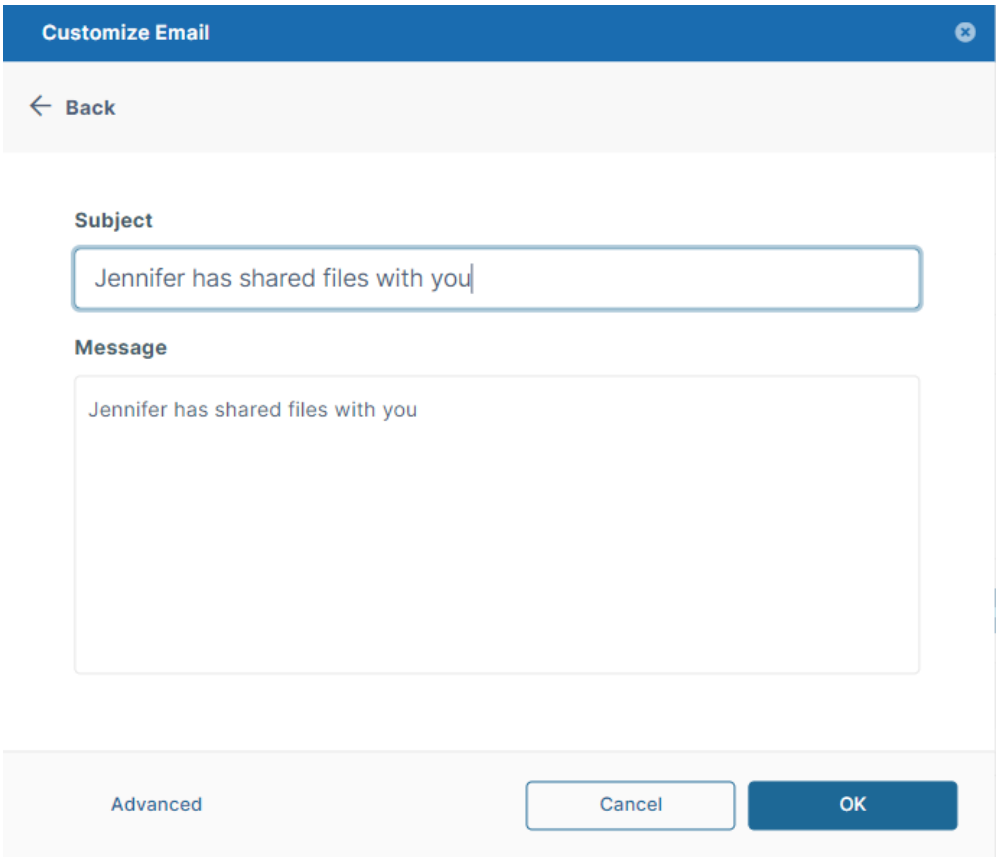


To customize the email content

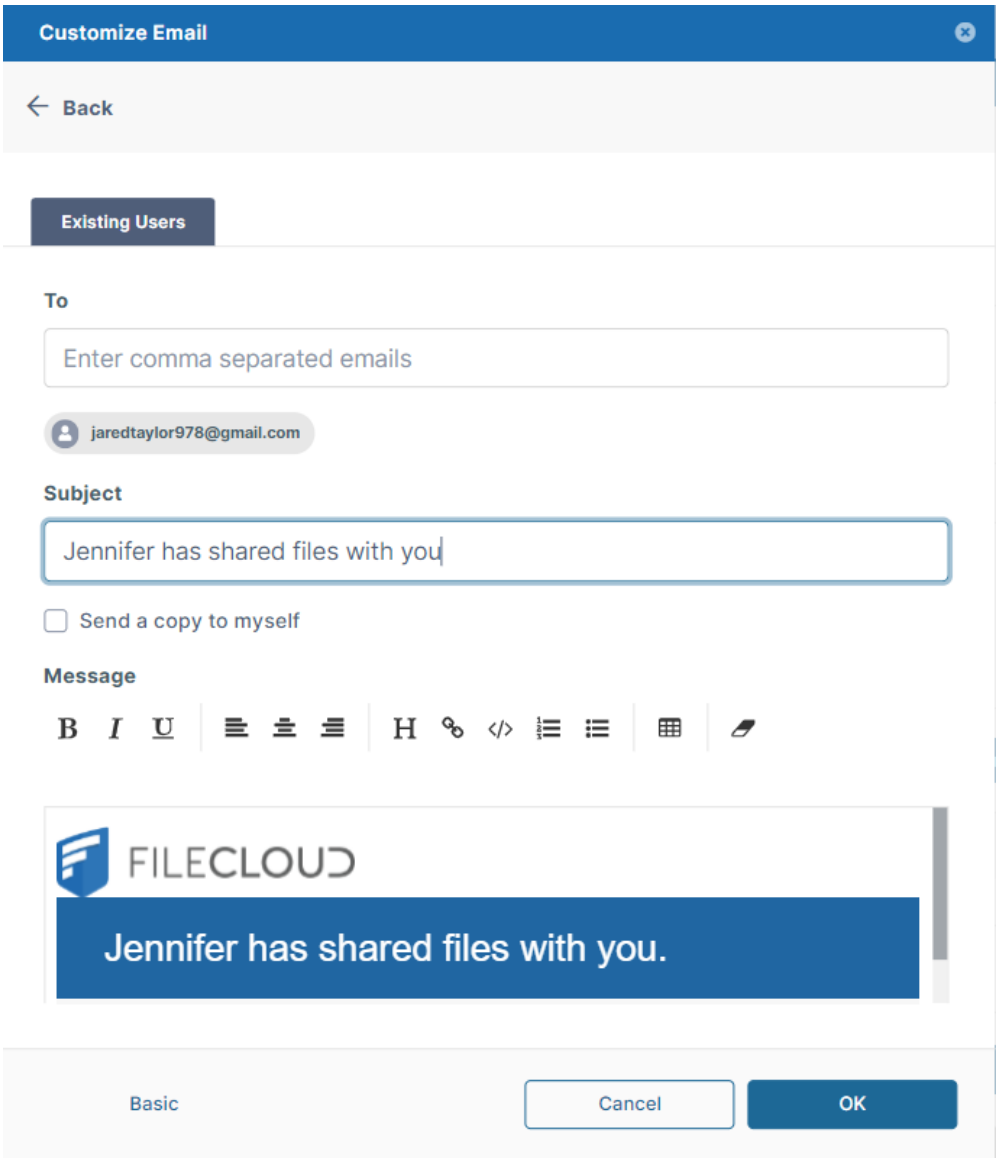
1. Leave **Send Email** checked and click **Edit**.



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



2. If you want to change the subject or text of the message, change it here, and click **OK**.
3. If you want to add additional recipients, change the format of the email, or remove the link, click **Advanced**.
   An email form with additional customization options opens.



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

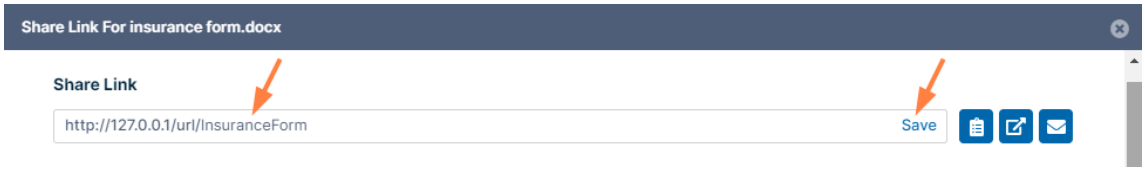
Editing a Share Link in Drive

From the **Share Link** dialog box, you can edit the name of a link to be more descriptive.

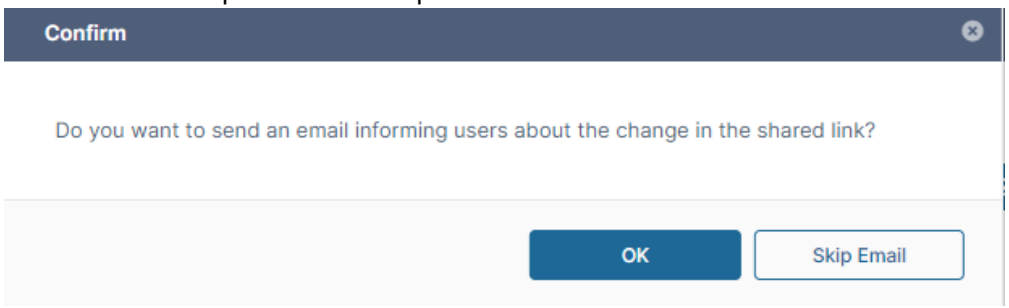
1. In the **Share Link** dialog box, click **Modify Link**.
   The portion of the link that you can change becomes highlighted.



2. Enter a new name for the link, and click **Save**.



The link name is changed, and you are prompted to confirm whether or not you want to send an email to share recipients with the updated link:

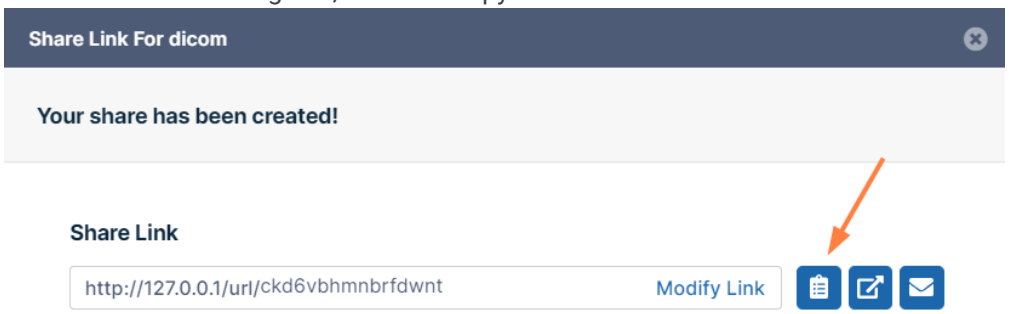


Note: If this is the first time you are adding a user to the share, they will receive an email with the link regardless of whether you choose **OK** or **Skip Email**.

Copying a Share Link in Drive

In the **Share Link** dialog box, you can copy a link and then post it in a site or send it to a user.

- In the **Share Link** dialog box, click the Copy icon next to the share link.

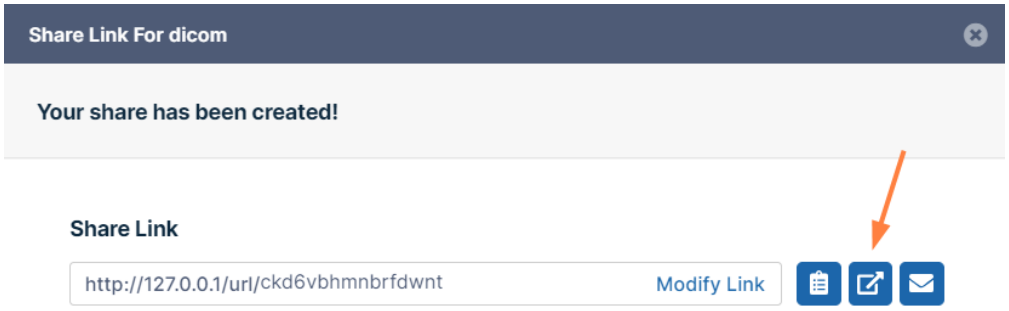


The link is now copied and you may paste it into website or message.

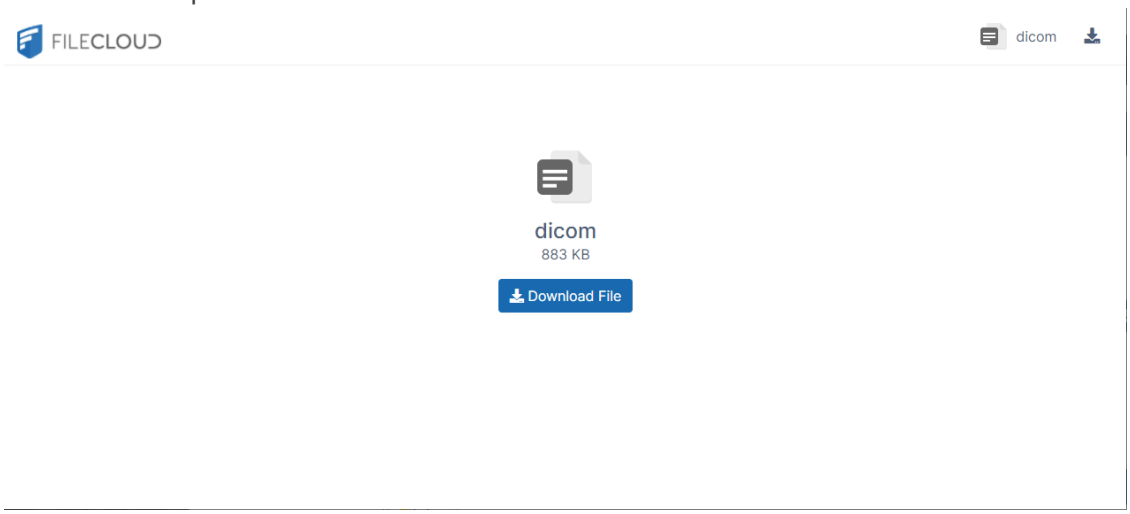
Previewing a Share in Drive

From the **Share Link** dialog box, you can view a share as it appears to recipients when they click the share link.

- Click the Preview icon next to the share link.



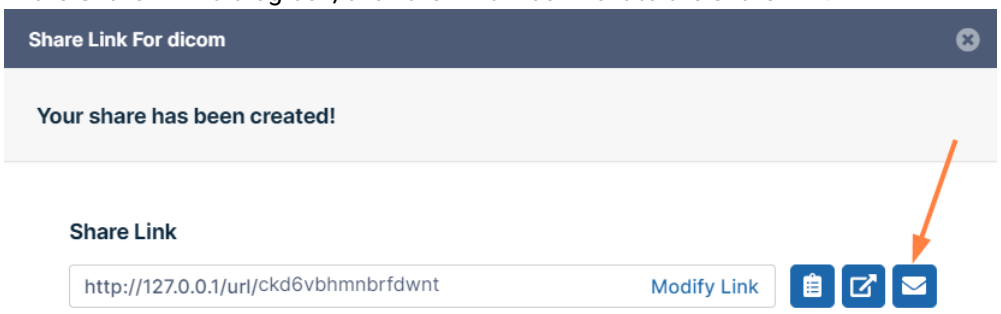
The share link opens in the browser as it would for a user who clicked the link:



Emailing a Share Link in Drive

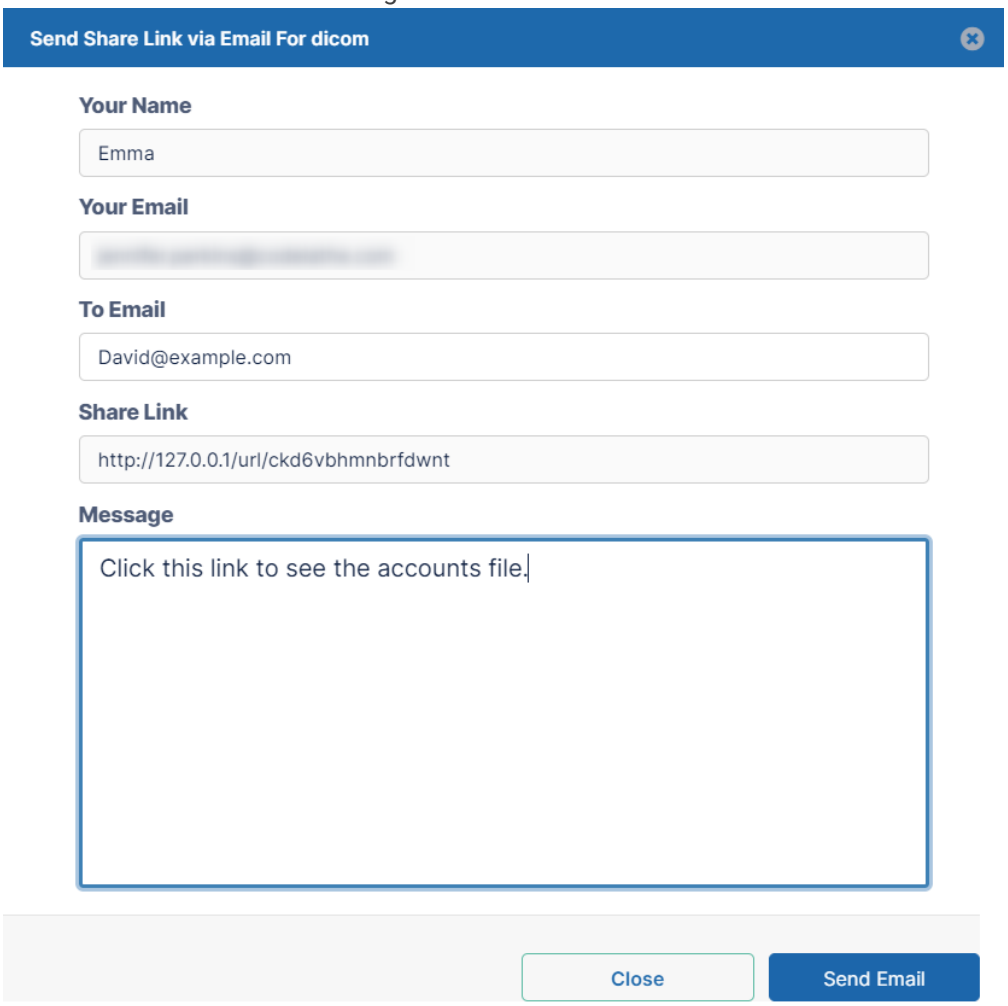
From the **Share Link** dialog box, you can email a link to users to give them initial access to your share or to resend a private link to share recipients.

1. In the **Share Link** dialog box, click the Email icon next to the share link.



A **Send Share Link via Email** dialog box opens.

2. Enter a To address and a message.



3. Click **Send Email.**

Sending a link from a Team Folder or Shared With Me

You can use the Direct Link option to copy a link to an item and send it to others who already have share access to it. That means they must already have permission to access the item.

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

- Shared with me
- Team Folders

After clicking the share link, the user must log in to FileCloud Server, and is then taken directly to the selected folder or file.

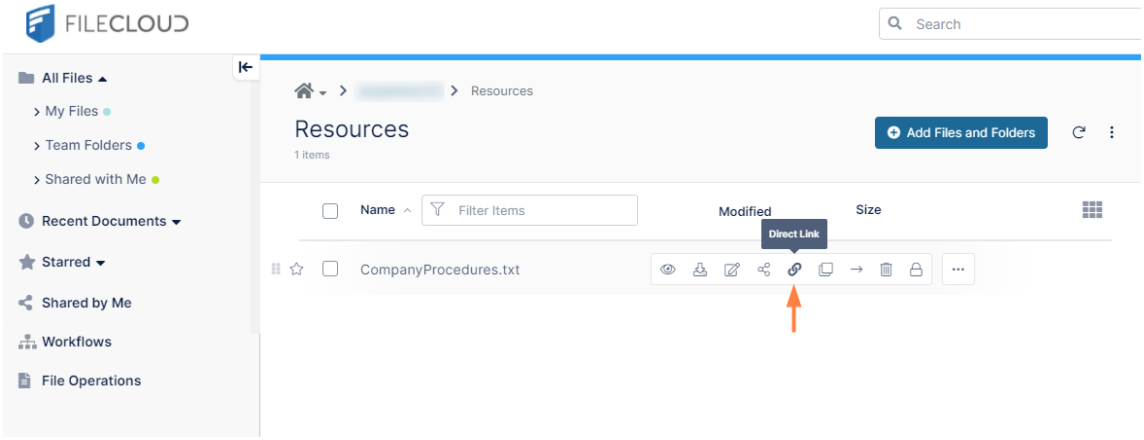
In the **Shared With Me** or **Team Folders** sections, you may create a link to a folder or a file to send to users in an existing share without creating a new share.

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

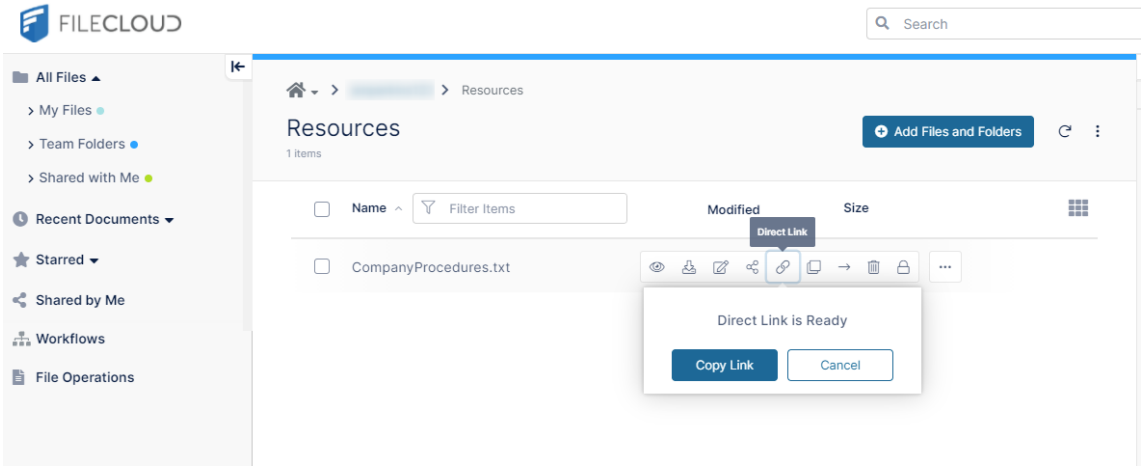
Limitation
For Team Folders, direct links to files in sub-folders that are created by users who have access to the parent folder and sub-folder will not work for users who only have access to the sub-folder, because the links will include the parent folder path, which does not exist in the file structure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

To create a direct link:

1. Navigate to the file or folder in **Shared With Me** or **Team Folders**.
2. Hover over the file or folder and click the **Direct Link** icon.



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

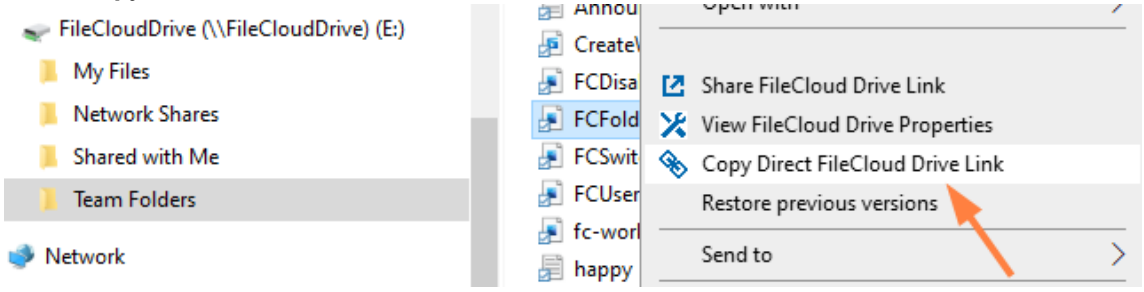


3. Click **Copy Link**.

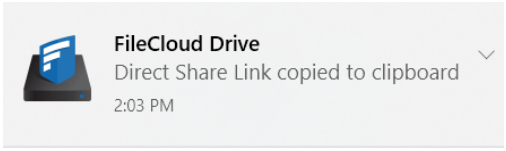
4. Paste the link into an email or a file, and send it to users.

To share a file by creating a direct link:

1. Launch FileCloud Drive by right-clicking on the icon in your system tray and choosing **Open Folder**.
   A File Explorer window opens, displaying the contents of your mapped drive.
2. Open a Team Folder or Shared with Me folder, right-click the item you want to share, and then select **Copy Direct FileCloud Drive Link**.



   The link is copied to the clipboard and if alerts are enabled, the following alert appears:



3. Paste the link and send it to a user.

Using FileCloud for Office with Drive

FileCloud for Office is an MS Office add-in for Word, Excel, and PowerPoint which can be used in both Windows and macOS with FileCloud Sync, FileCloud Drive, and FileCloud Desktop. It is available in FileCloud beginning with version 23.1.
For instructions on how to install FileCloud for Office, see Using FileCloud for Office.
If you have been using FileCloud Drive with DocIQ, see the instructions for previous users of DocIQ at the bottom of this page.

Before using FileCloud for Office with Drive

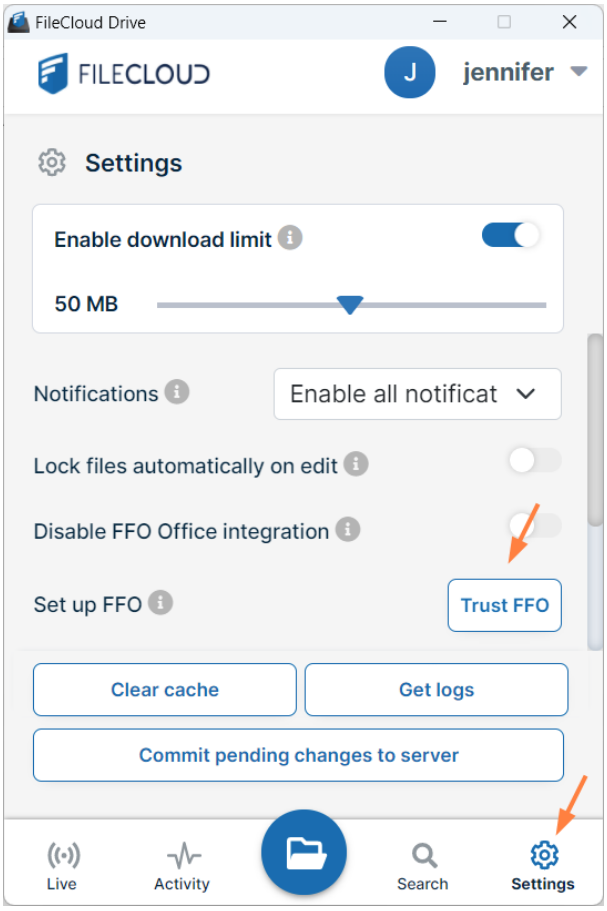
The first time you install Drive or upgrade Drive to use FileCloud for Office you must:

- Confirm that you trust FileCloud for Office and enable it as shown in the following procedure.

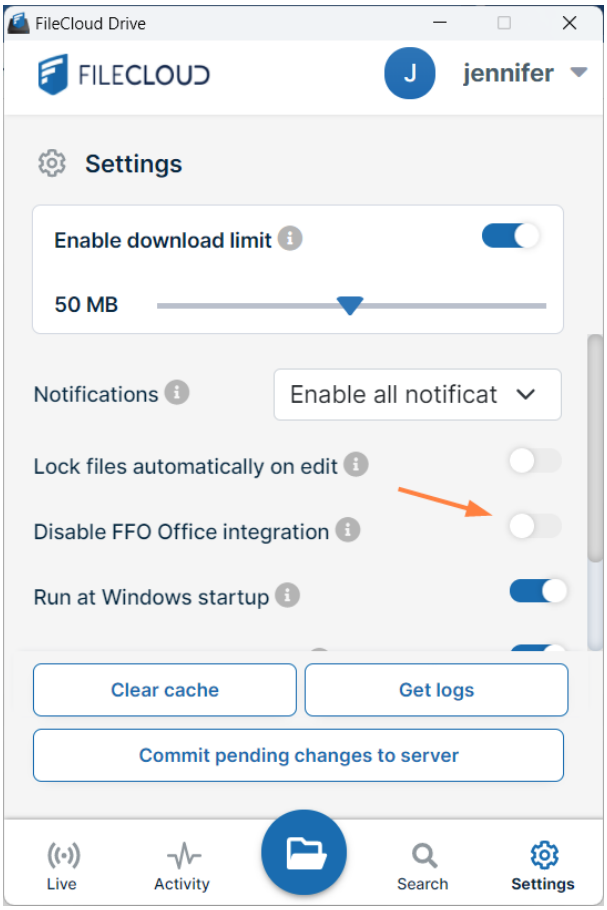
To confirm that you trust FileCloud for Office and enable it:

1. After you log in to FileCloud Drive, click the **Settings** tab.

2. Click the **Trust FFO** button.



The **Trust FFO** button disappears, and **Disable FFO Integration** remains automatically turned off:



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

Working with FileCloud for Office in Drive

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

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

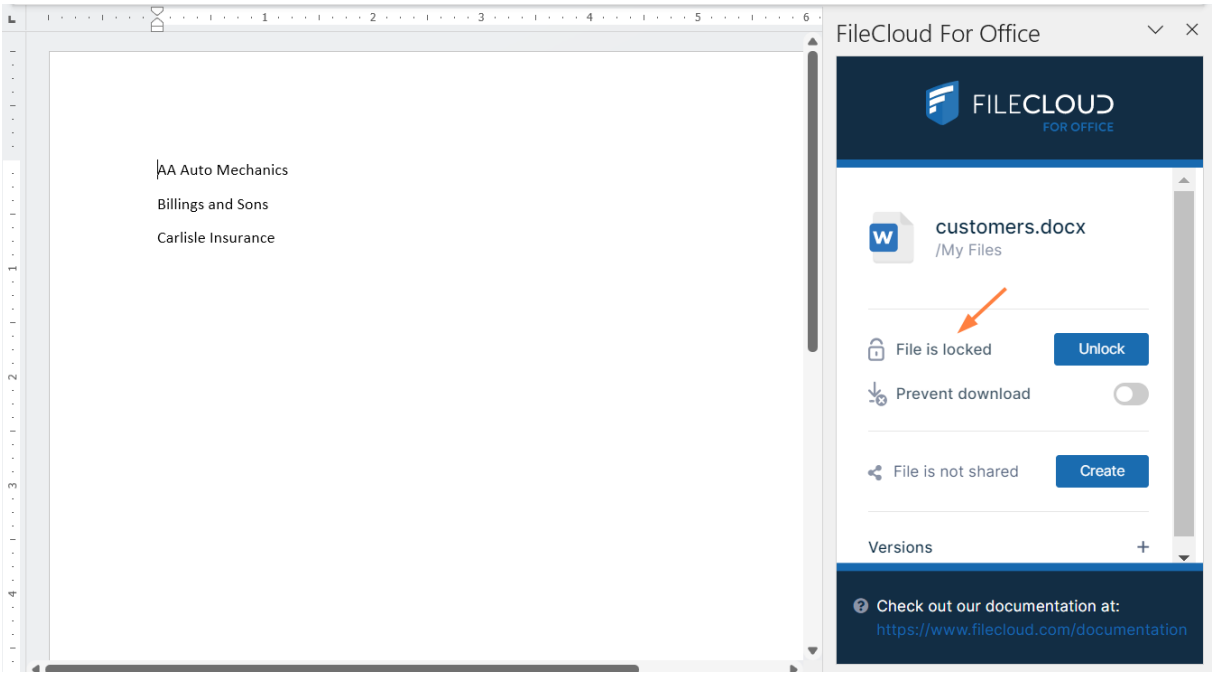
Lock or unlock a file

Locking and unlocking files

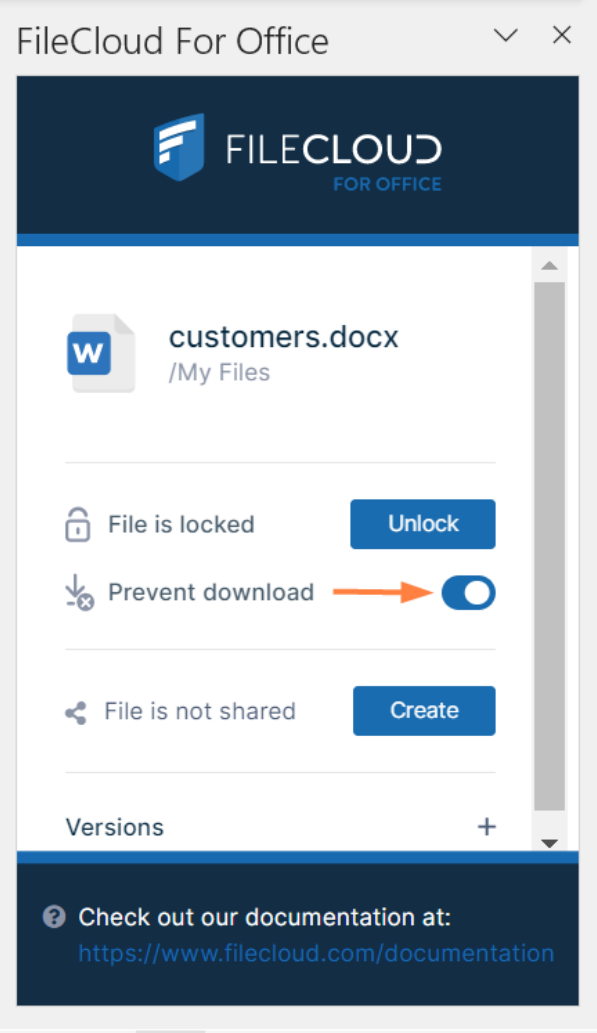
You can use the file locking function in FileCloud for Office to:

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

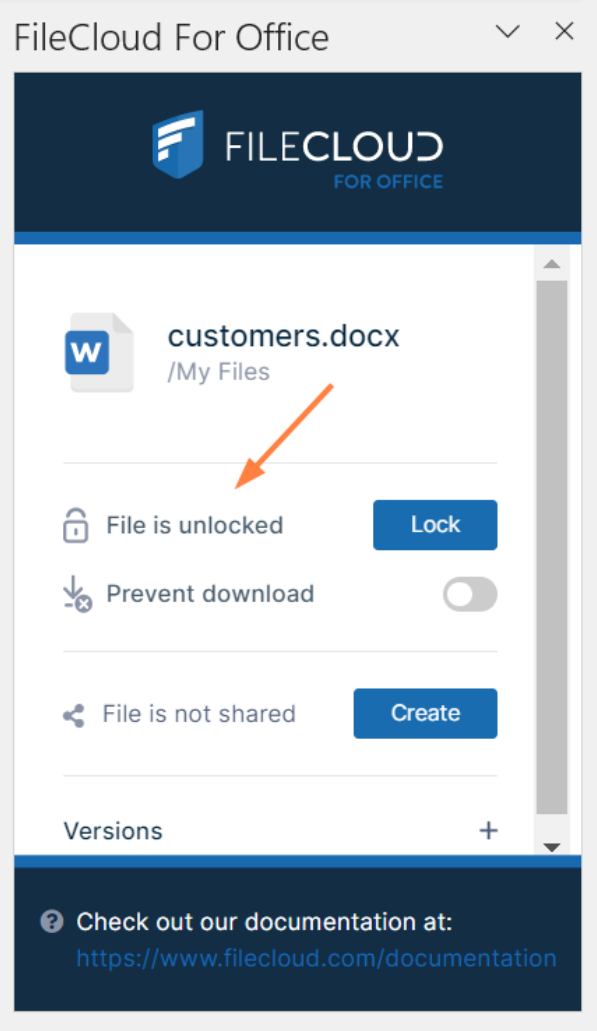
If a shared file is not locked when you open it for edit, another user can also open the file and make changes.
To avoid this, by default, FileCloud for Office automatically locks files for editing when they are opened.
When you open an Office file in your client directory, the FileCloud for Office panel shows **File is locked**, and by default, users are allowed to download or read the file (**Prevent download** is disabled).



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



- To unlock the file while you have it opened for edit, click **Unlock**. Now other users can modify as well as view and download the file.
  Note: Prevent download cannot be enabled when the file is unlocked.



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

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

For a locked file with download (read) prevented:
If USER1 has locked (and read blocked) the file:

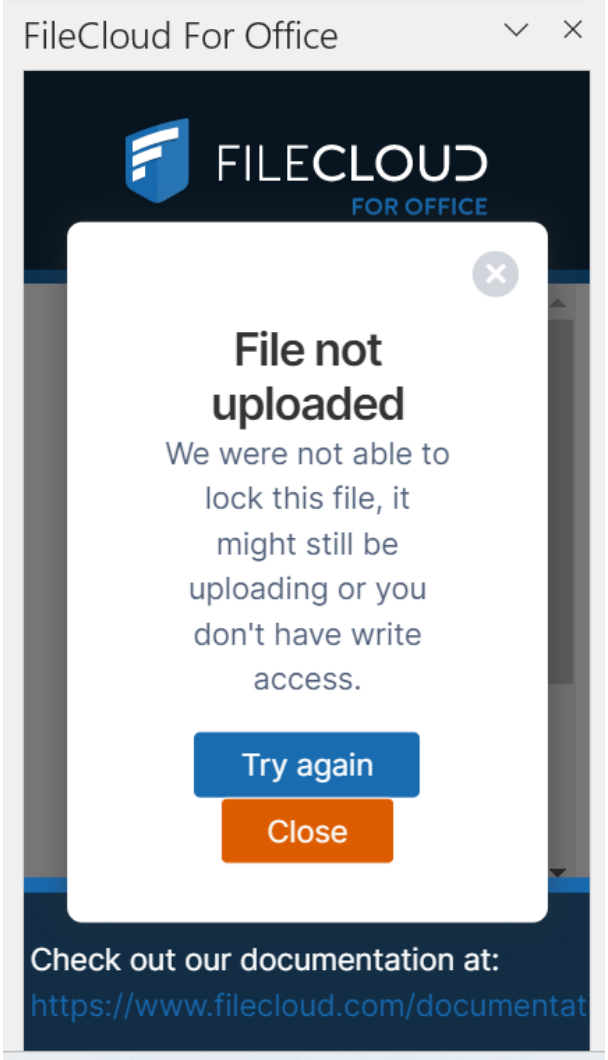
- The FileCloud client will not download the file for USER2

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

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

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

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



If you are an admin and want to disable locking, see Managing User Locks.

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

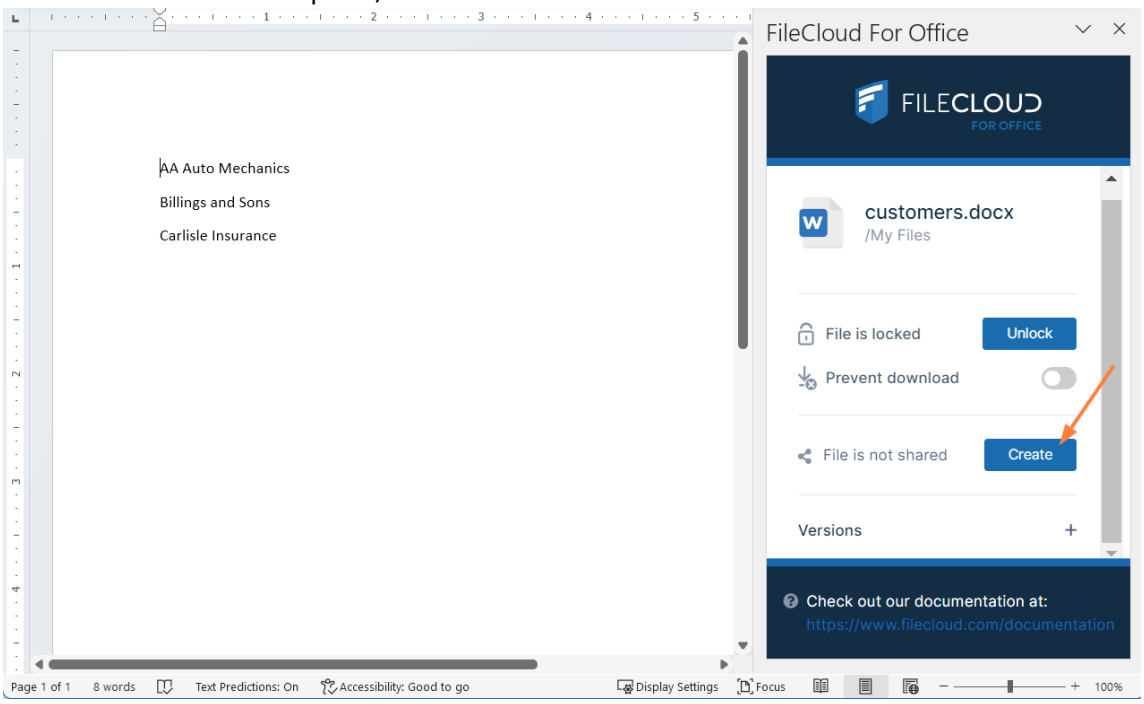
Action	Doc IQ Lock Enabled	Prevent Download	Lock Status Before Open	Lock Status After Open	Lock Status After close
An unlocked file is opened by USER1	☑	☒	File is not locked	File is locked (read allowed) by USER1	File is not locked
An unlocked file is opened by USER1	☒	☒	File is not locked	File is not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

Share a file

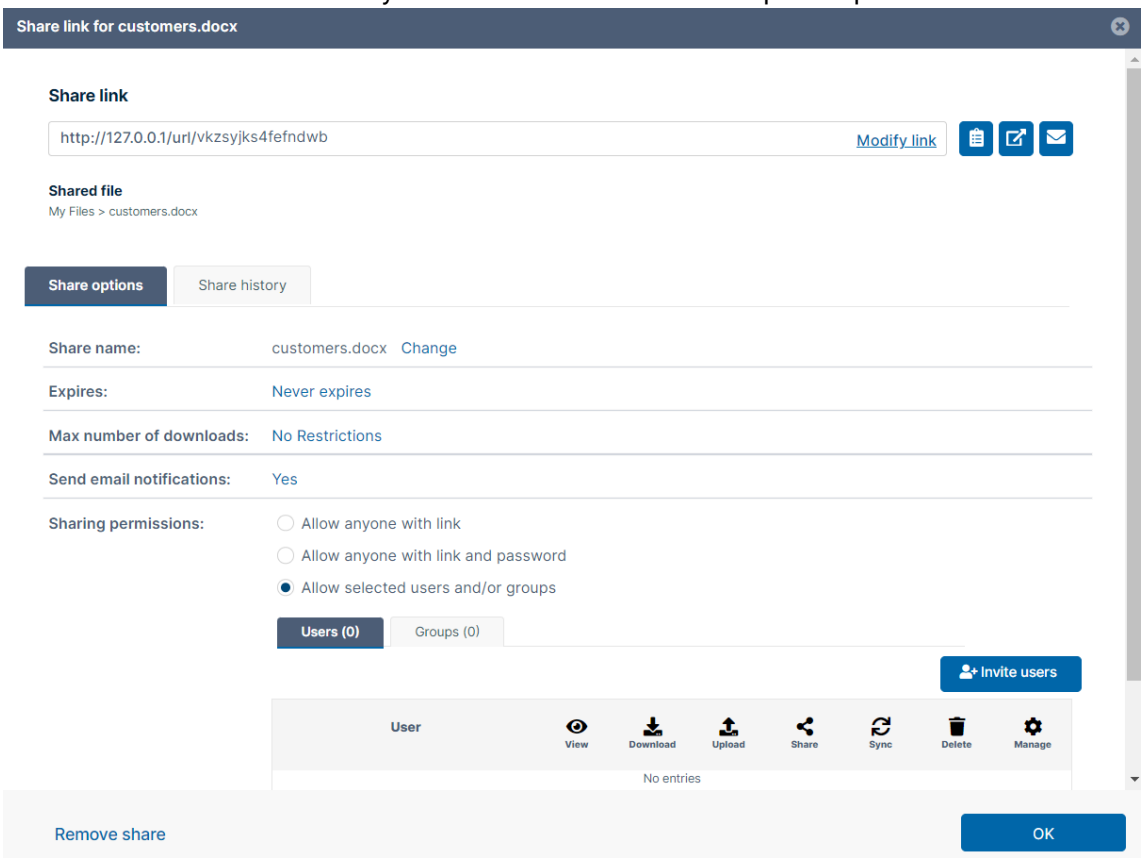
Sharing a file

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

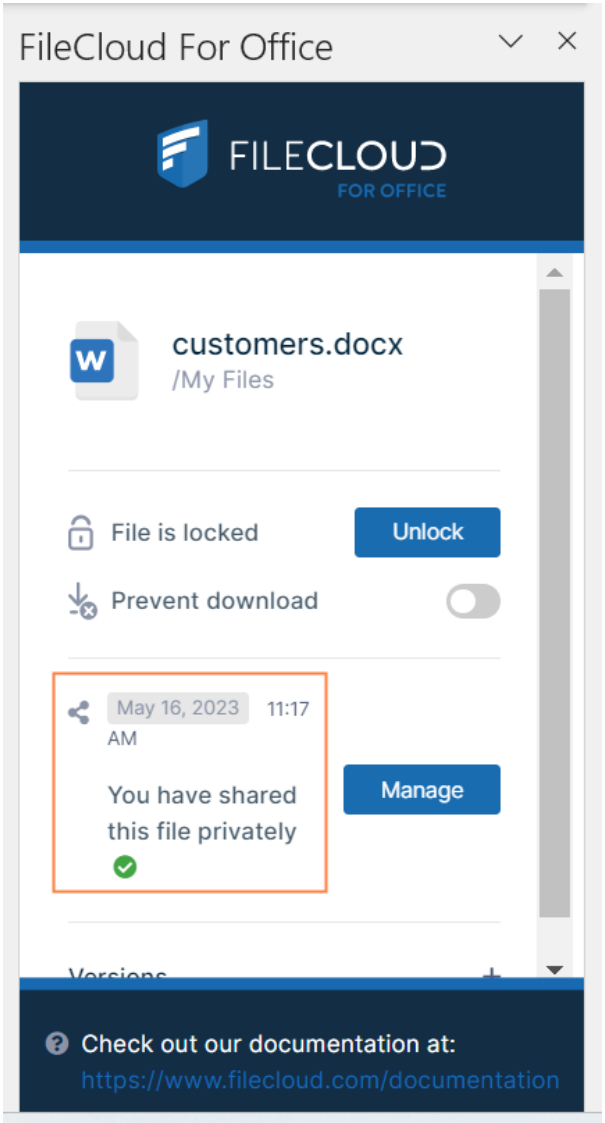
1. In the FileCloud for Office panel, click **Create**.



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



2. Share the file using the same settings and options that you would for a share in the user portal. See Sharing Files and Folders for help.
   Note: The option for downloading the share QR code, which is available for shares created from the user portal, is not available for shares created in FileCloud for Office.
   After you have shared the file, the FileCloud for Office panel displays details of the share:



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

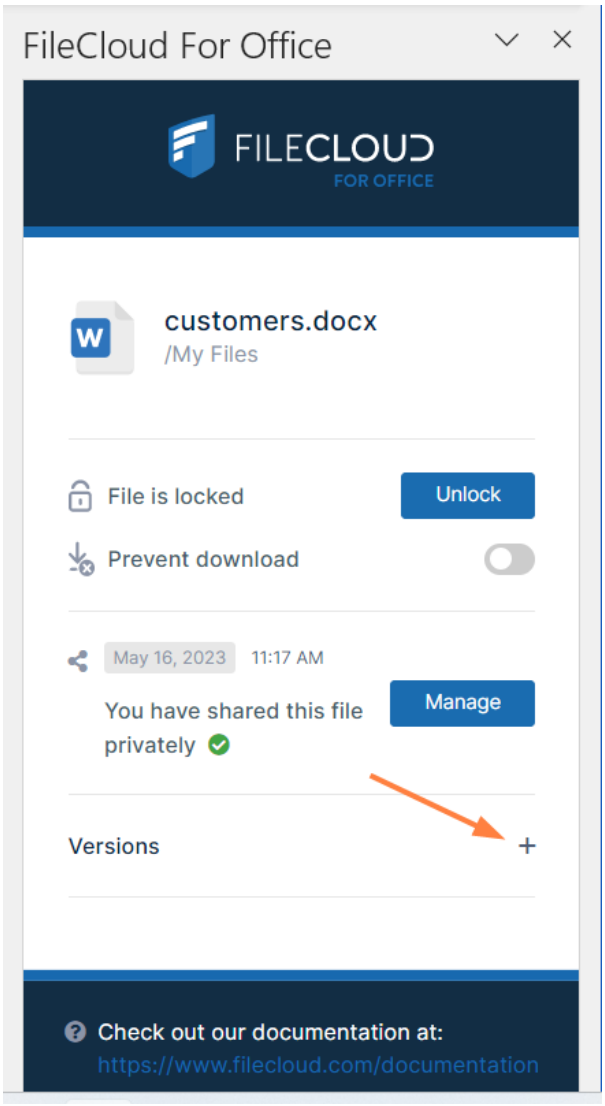
Download versions, view details and metadata

Downloading versions, viewing details, viewing metadata

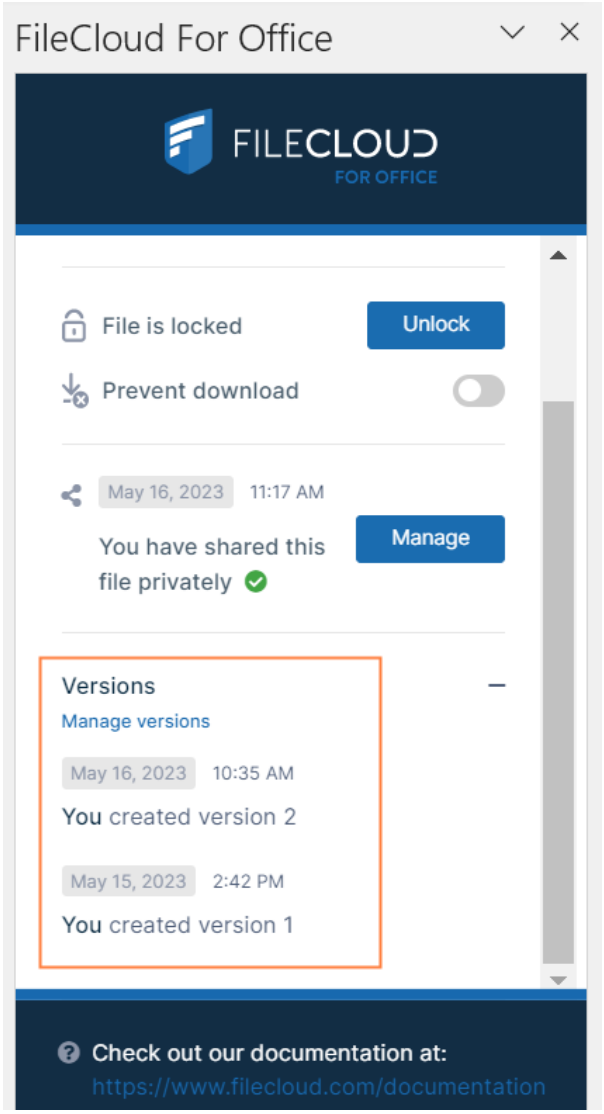
Versions

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

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

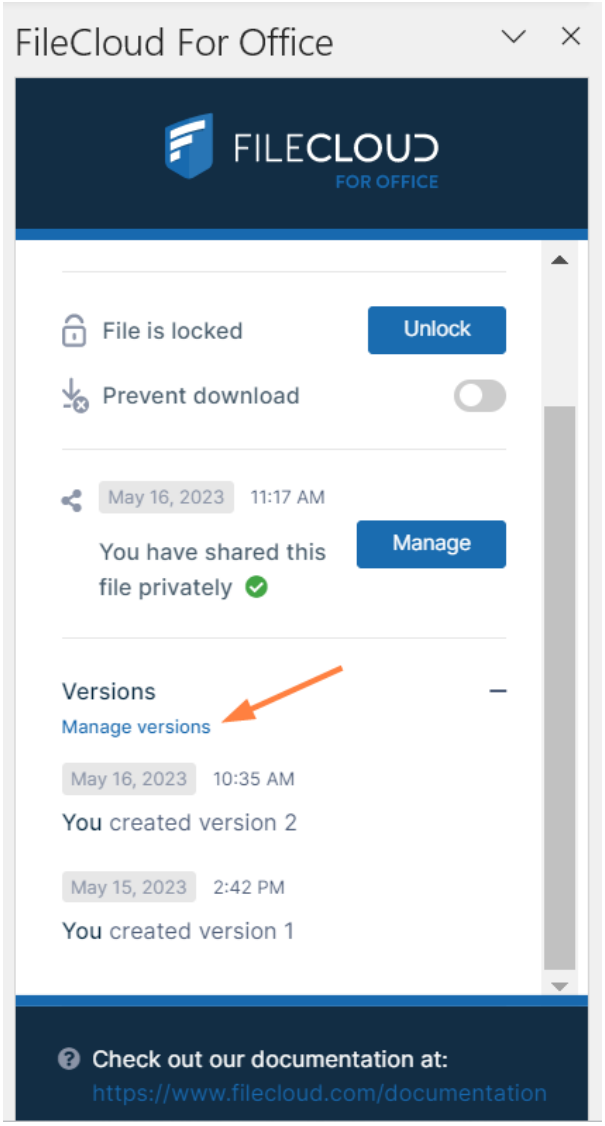


The expanded **Versions** section shows you version information about the file.

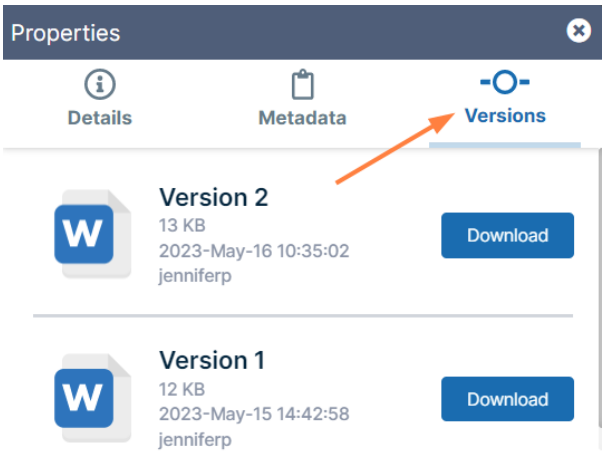


To download file versions in FileCloud for Office:

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



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

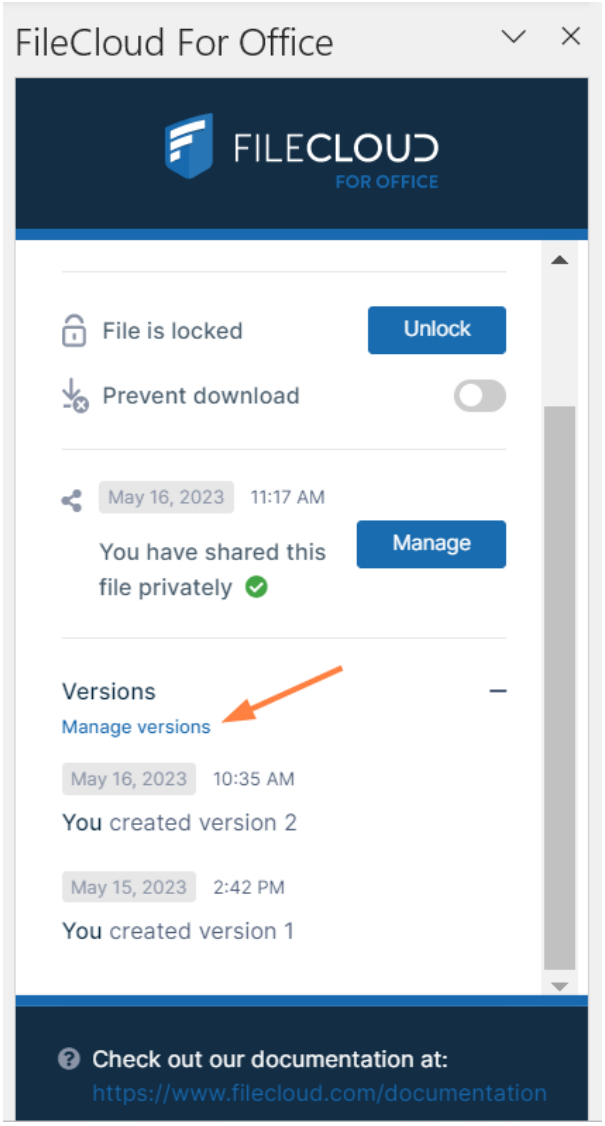


2. Click **Download** for the version that you want to download, and save it.

Details

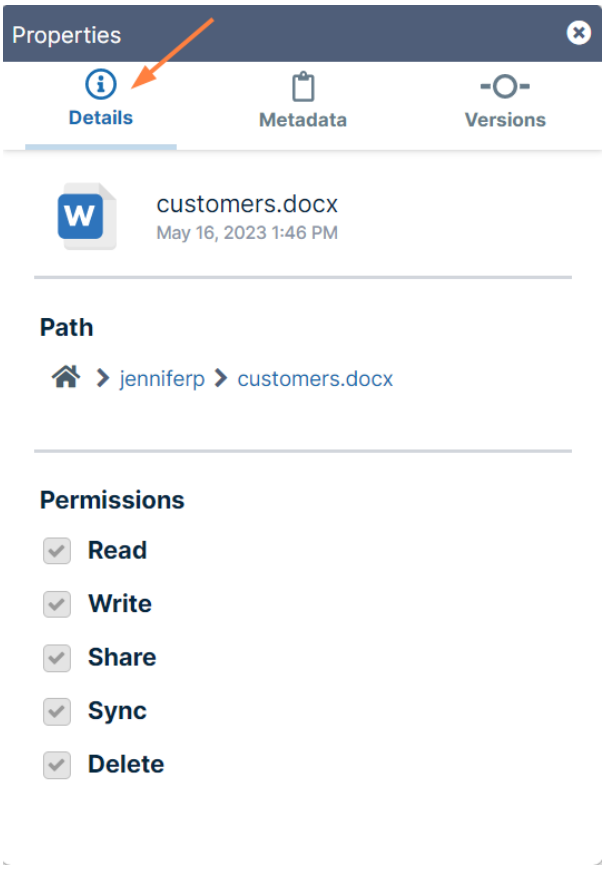
To view file details:

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



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

2. Click the **Details** tab.

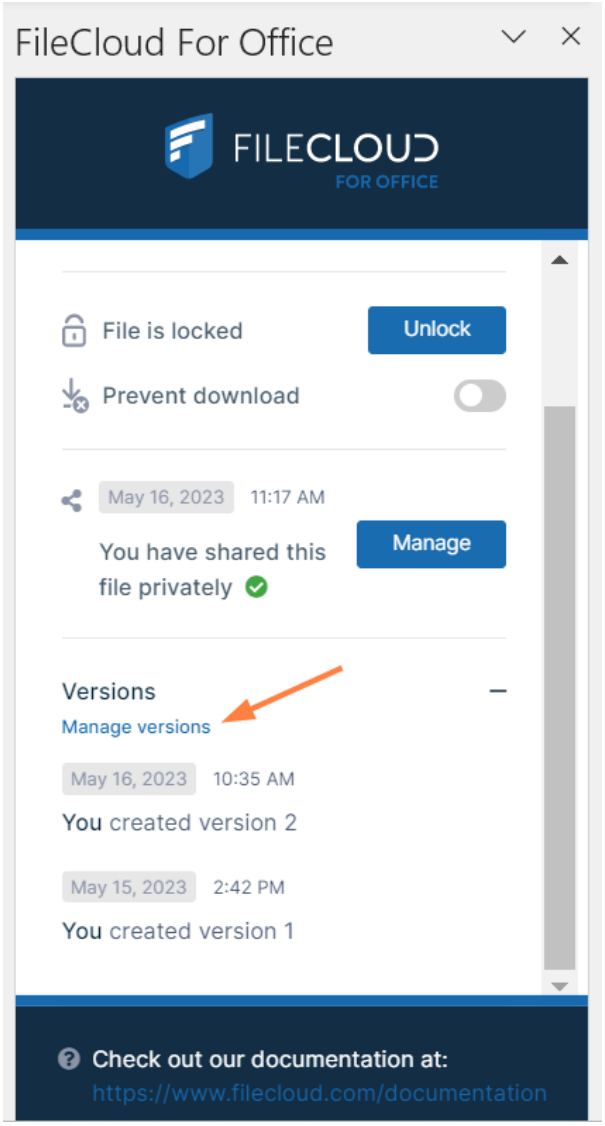


The details shown are the filename and type, the last modified date, the path of the file in FileCloud, and your permissions for the file.

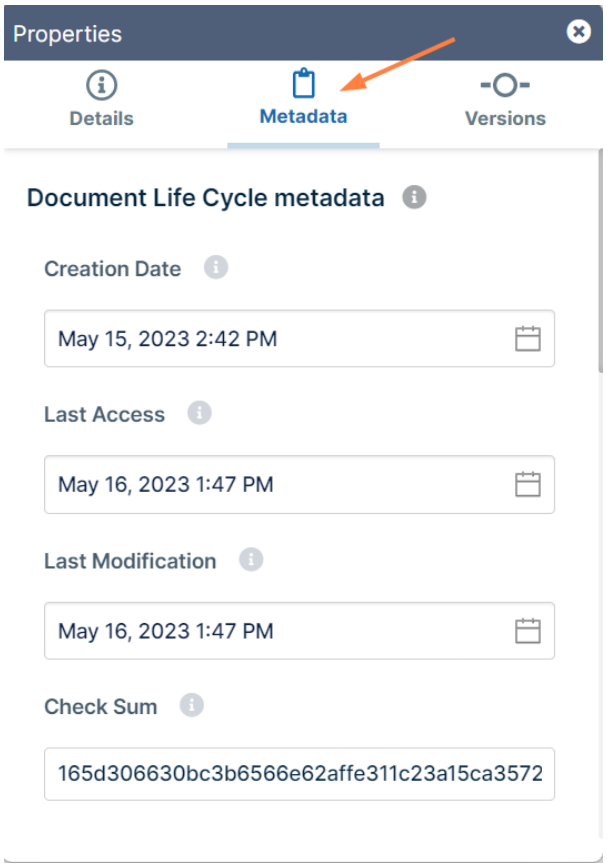
Metadata

To view metadata information for the file:

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



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



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

FileCloud for Office log locations

Locating FFO logs

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

Windows: %appdata%/FFOServer

macOS: /Users/[USERNAME]/Library/Preferences/FFOServer

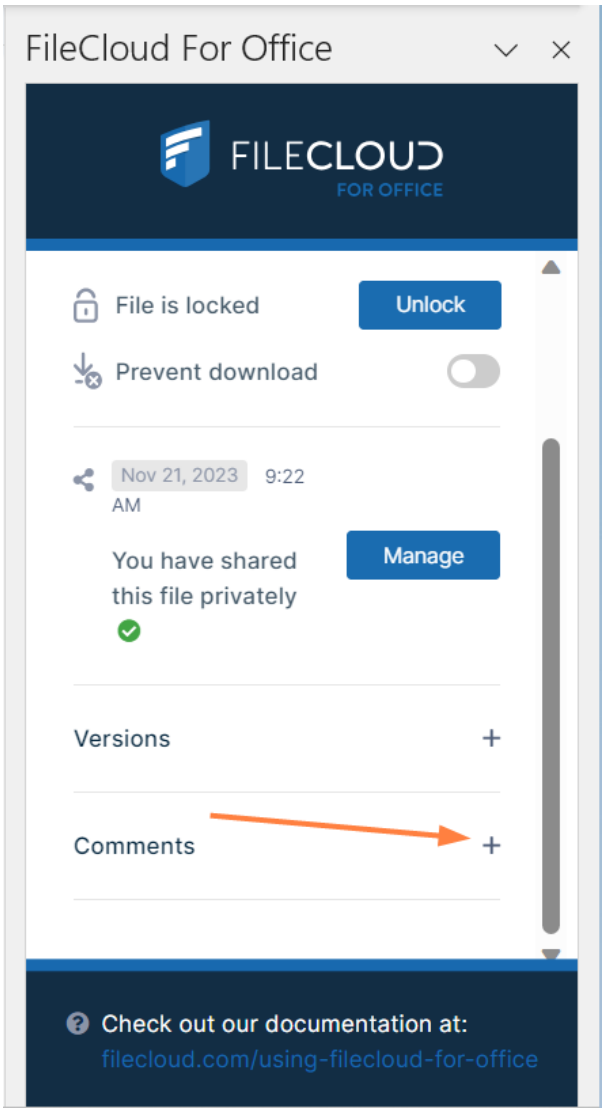
View and add comments

Viewing and adding comments

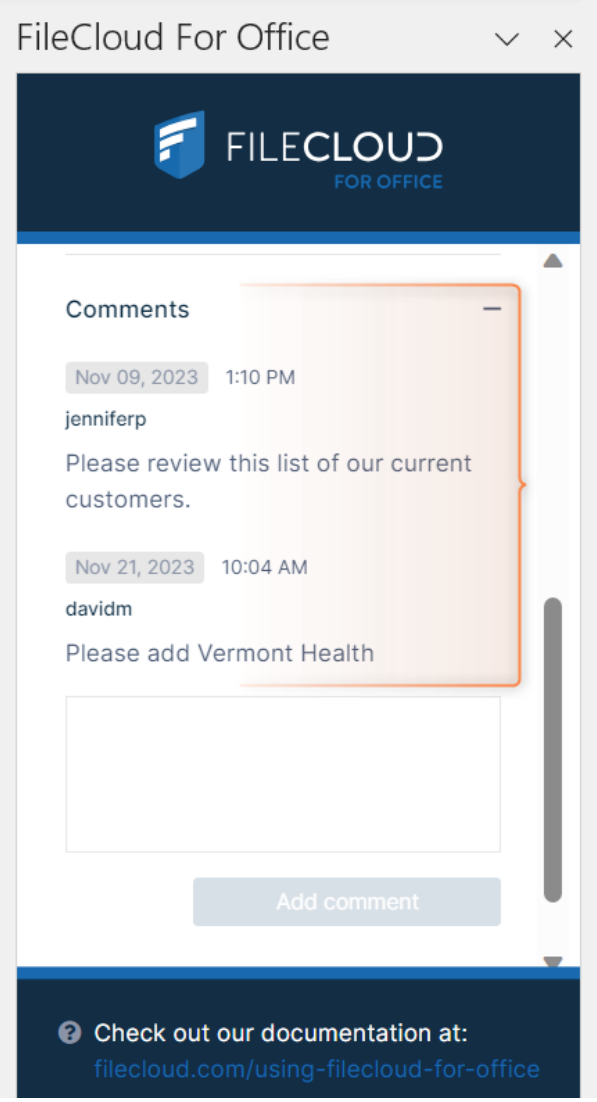
Comments added to files and folders in FileCloud for Office also appear in the user portal and any of the other client apps.

To view and add comments in FileCloud for Office:

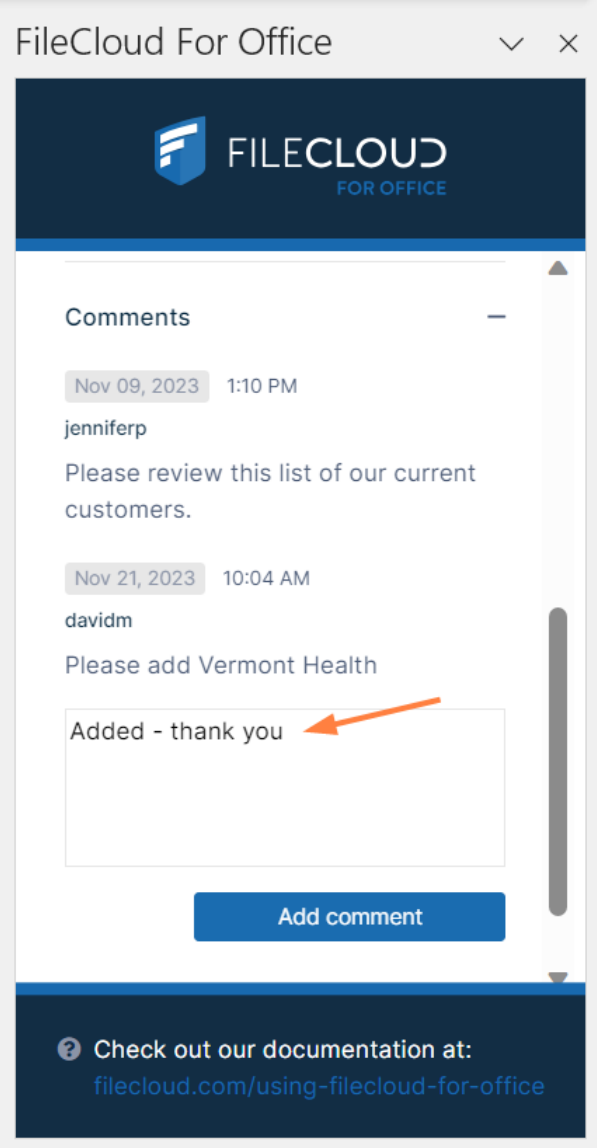
1. If **Comments** is not visible in the FileCloud for Office panel, scroll down to the bottom of the panel.
2. Click the **+** across from **Comments**.



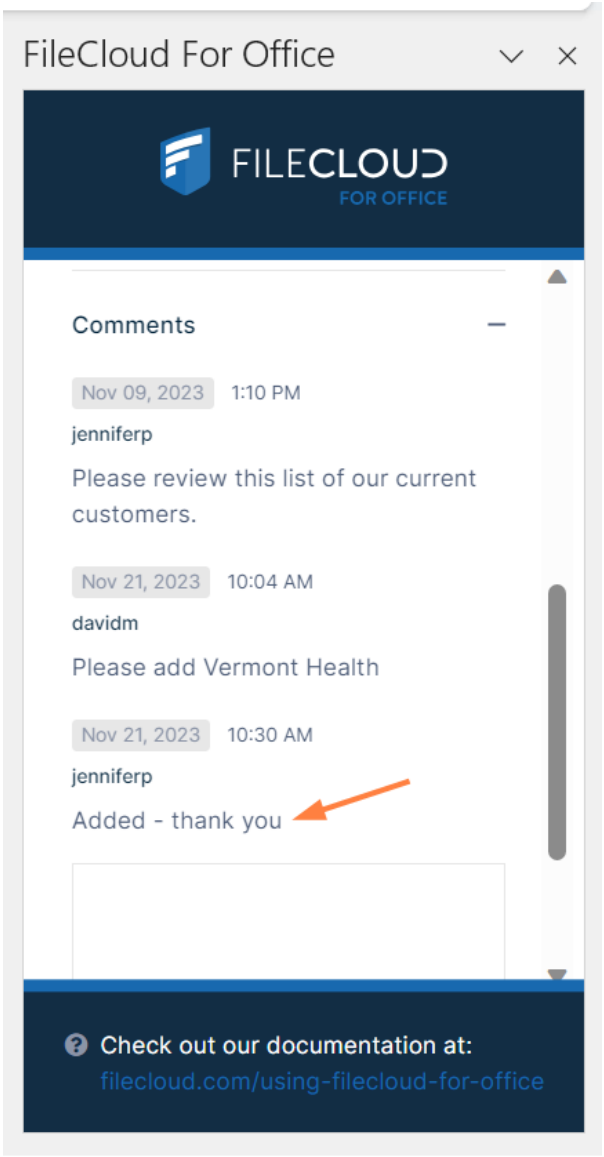
Any existing comments added to the file or folder here or anywhere else in FileCloud appear above the **Comments** box.



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



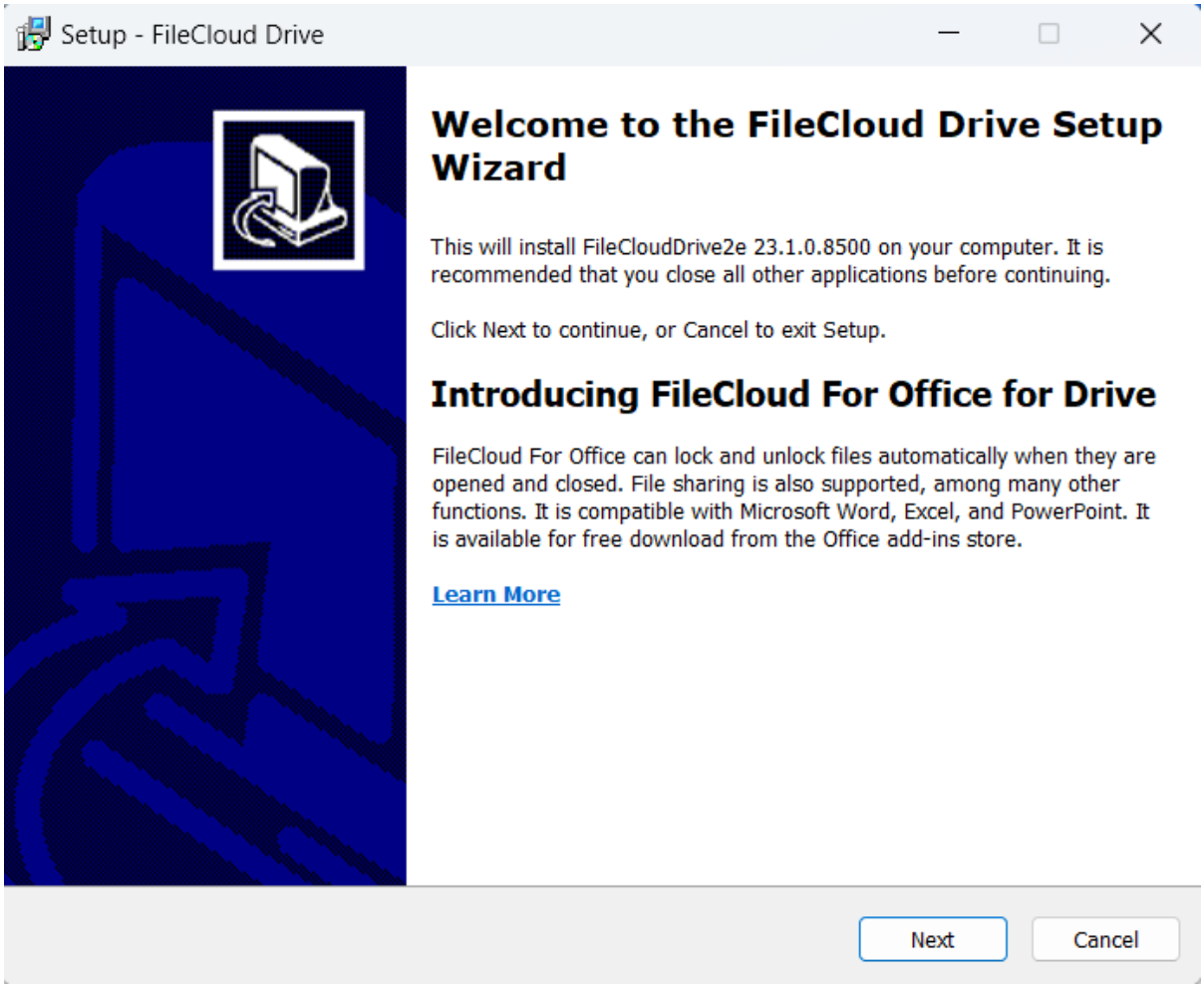
4. Click **Add comment**.
   The comment is added.



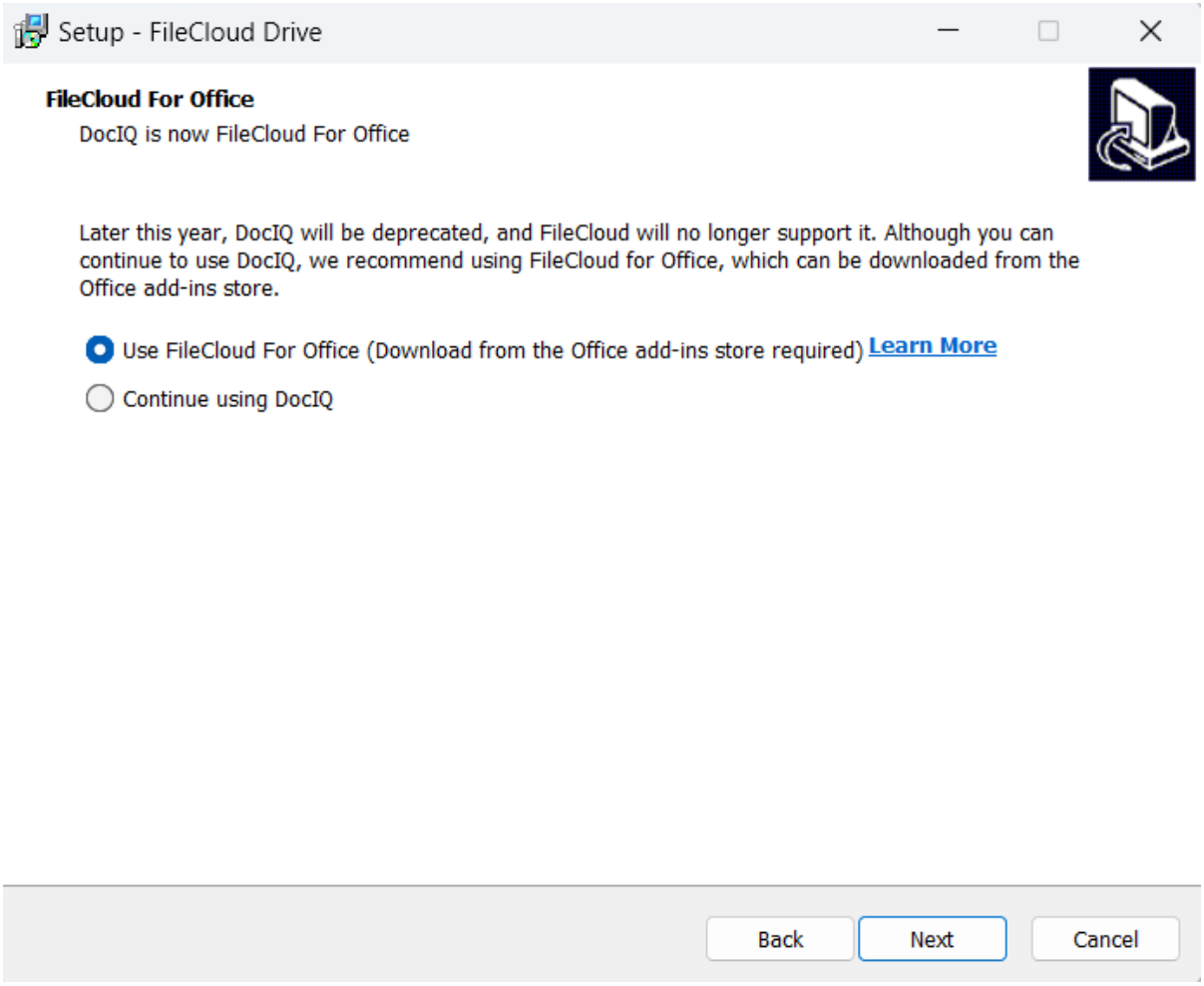
For previous users of DocIQ

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

When you run the FileCloud Drive installer, the first screen of the wizard introduces you to FileCloud for Office:



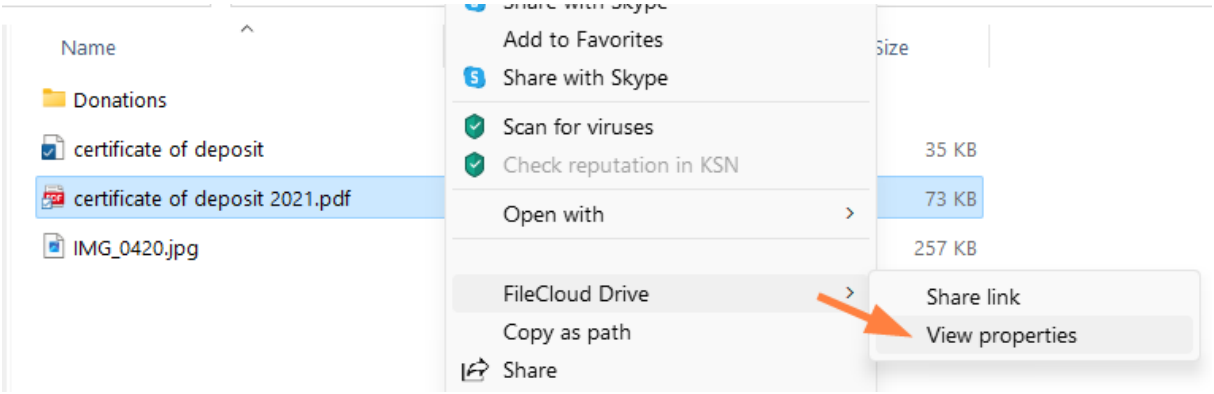
If you have been using FileCloud Drive with DocIQ, the installer prompts you to choose whether you want to continue using DocIQ or switch to FileCloud for Office (DocIQ will be deprecated in the future).



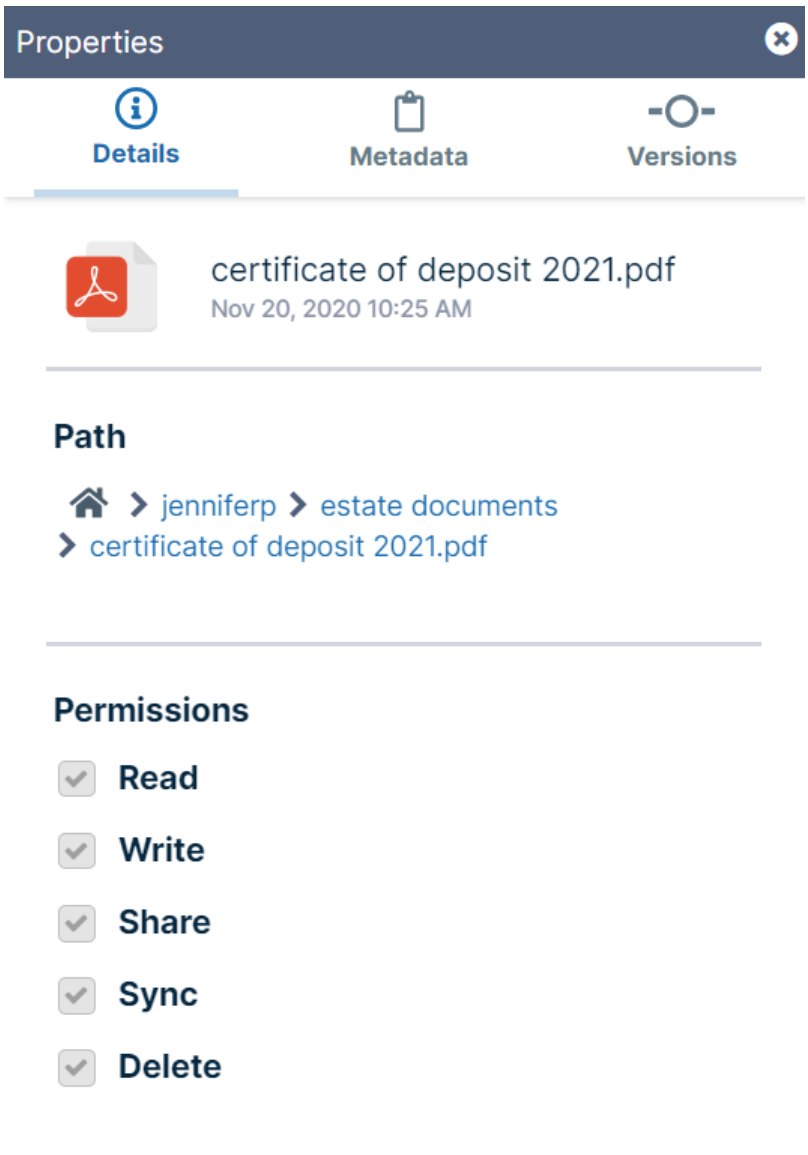
Choose whether you want to use FileCloud for Office or DocIQ. If you choose FileCloud for Office, you are also required to install an add-in.
The installer configures your Drive installation to function with the option you have chosen.

Viewing Your File Permissions

In Drive, you can view the permissions you have on a file or folder by right-clicking it in content explorer and choosing **Show more options > FileCloud Drive > View properties**:



Drive's Properties window opens to the Details tab, which displays your permissions for the file or folder.



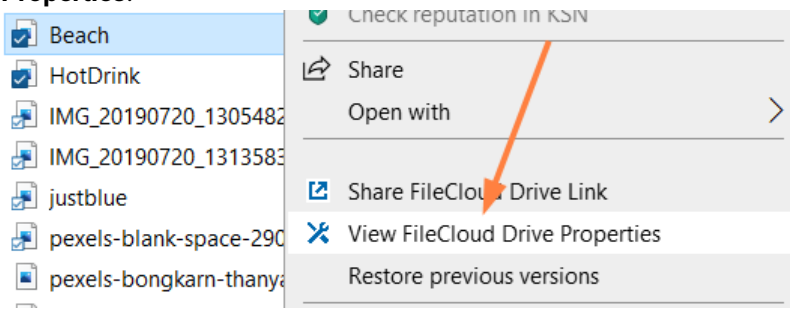
Viewing and Modifying Metadata

You can see version and metadata information or add metadata tags by viewing file or folder properties.

To view properties:

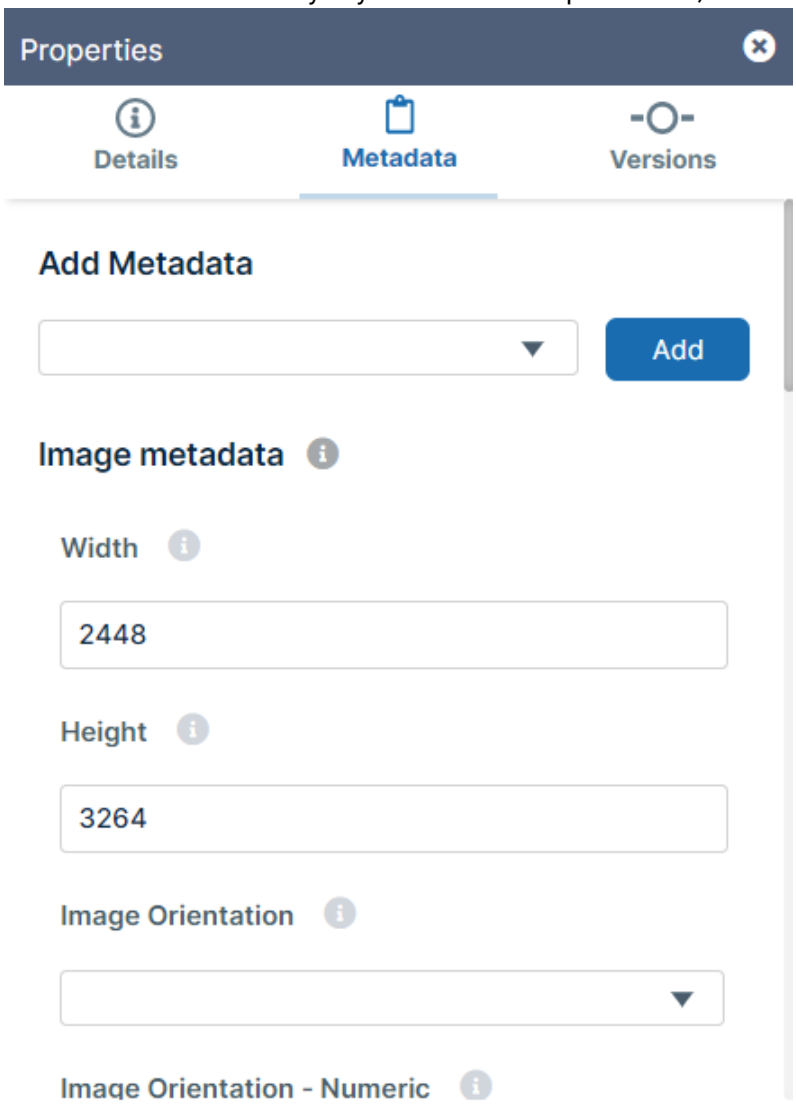
1. Launch FileCloud Drive by right-clicking on the icon in your system tray and choosing **Open Folder**.
2. A File Explorer window opens, displaying the contents of your mapped drive.

3. Right-click the item you want to view the properties for, and then select **View FileCloud Drive Properties**.



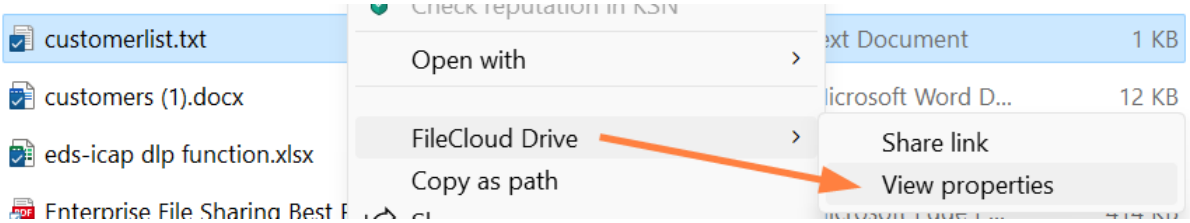
The **Properties** dialog box opens.

4. Click the **Metadata** tab.
5. View the metadata. Modify any values with edit permission,

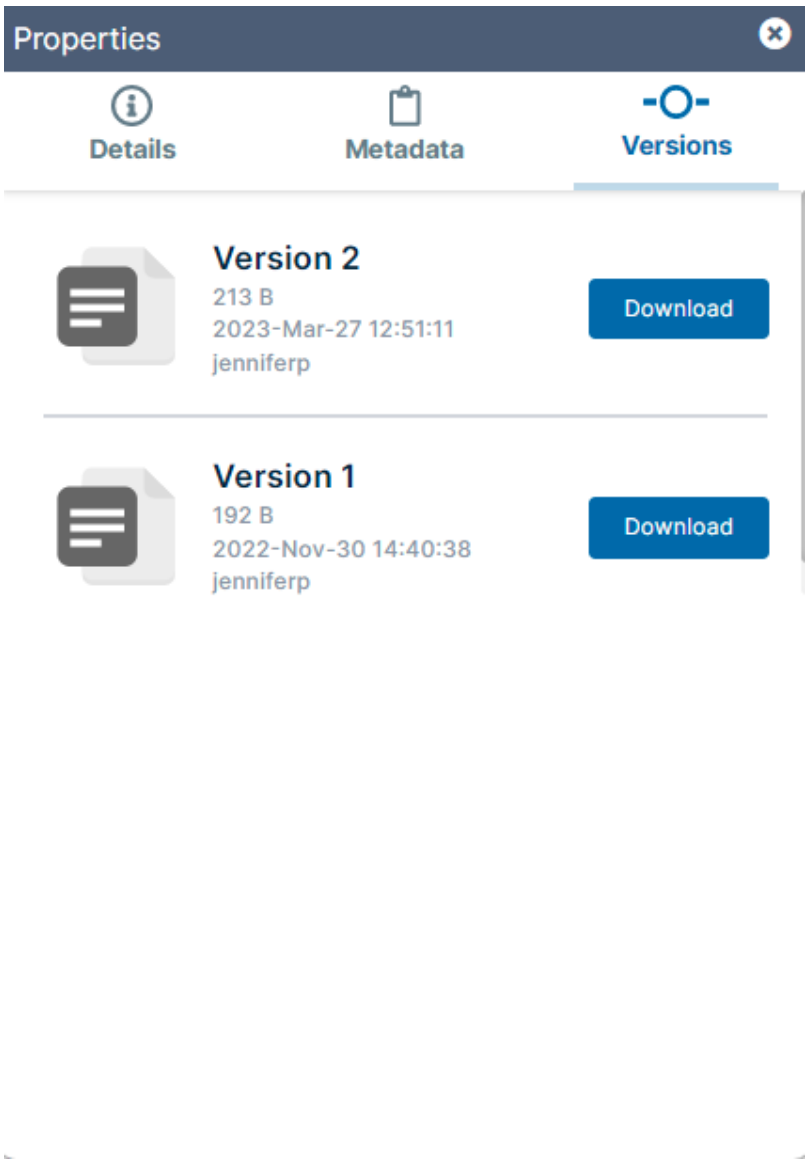


Viewing and Downloading File Versions in Drive

When a file is modified in FileCloud, the original file is saved as the prior version.
In Drive, you can view and download all versions of a file by right-clicking it in content explorer and choosing **Show more options > FileCloud Drive > View properties**:



Drive's **Properties** window opens. Click the **Versions** tab.
The **Versions** tab displays each version of the file and enables you to download it.



Checking Drive Status

Drive indicates its status by the icon shown in the system tray:

Icon	Image	Status
	Drive standard icon	Drive action was successful or no activity

	Hourglass	Drive is performing an action
	Hourglass with red dot	Error in Drive activity

Click the icon to open the dashboard.

Using FileCloud Drive in a Remote Desktop Service Environment.

Configuration Requirements

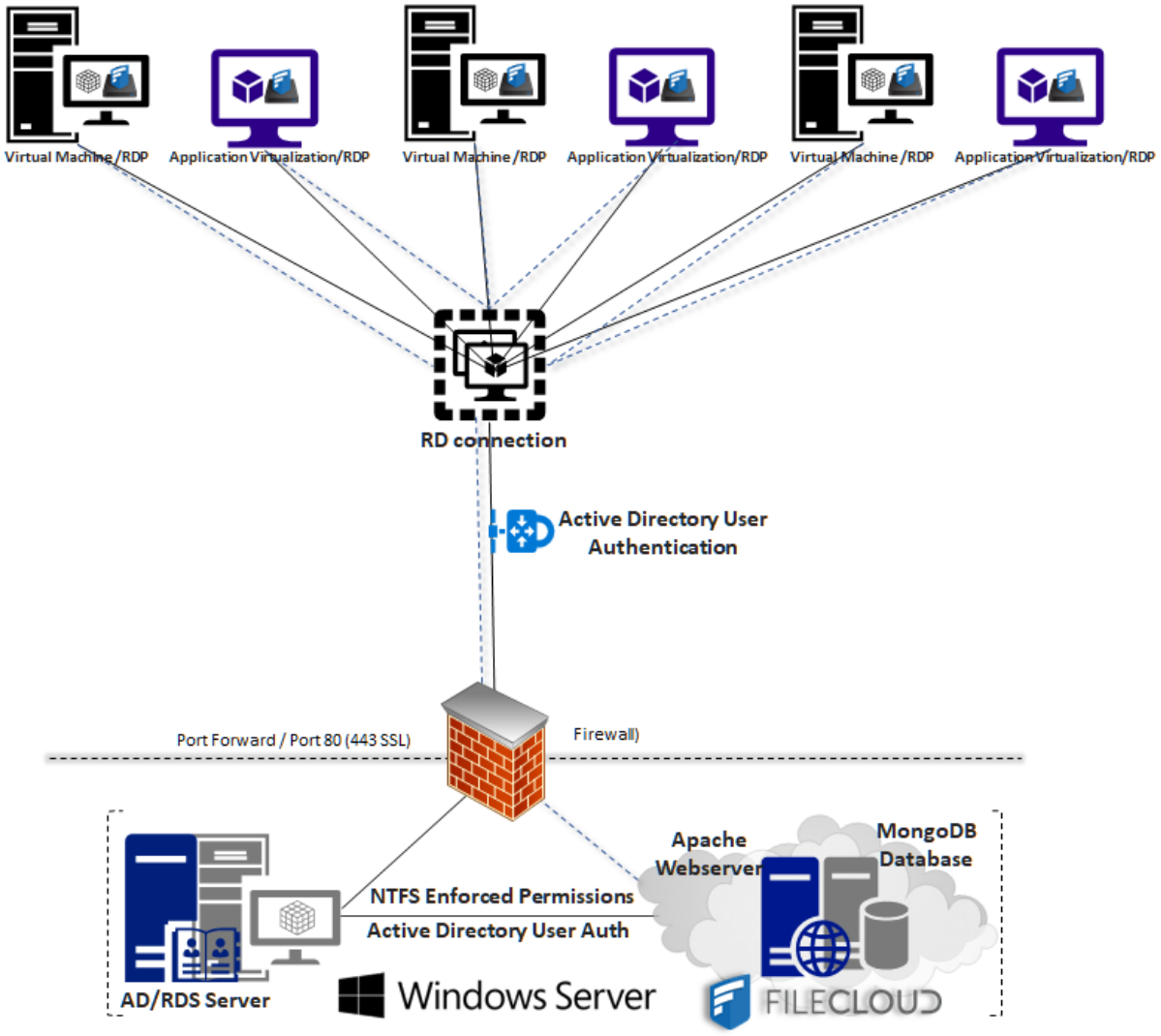
- FileCloud Drive needs to have multi-mount enabled. To enable multi-mount, add the parameter **<multimount>1</multimount>** in **config.xml.**
- To avoid mount letter overwrites, add the parameter **<useuniquemountlabel>1</useuniquemountlabel>** in **config.xml.**
- config.xml file is located at **C:\Program Files\FileCloud Drive\service**.

Environment Requirements

- Windows Server 2012-2019 x64
- The Remote Desktop Service environment containing the following minimum requirements (1 Domain controller /1 RD Connection Broker /1 RD Session Host /1 RD Gateway & Licensing / 1 RD Web Access (IIS)).

Additional Information.

- The Remote Desktop Service Terminal Server will share its resources across all active user sessions. Due to this FileCloud Drive's performance may be impacted if the server does not have enough resources. Please be sure to assign enough resources to your server depending on your usage.
- FileCloud Drive will be hosted on the terminal server, but it will mount directly on the user's computer.
- Make sure FileCloud Drive is visible in RD Web Access once you have published it.
- The config.xml file is located at **C:\Program Files\FileCloud Drive\service**.

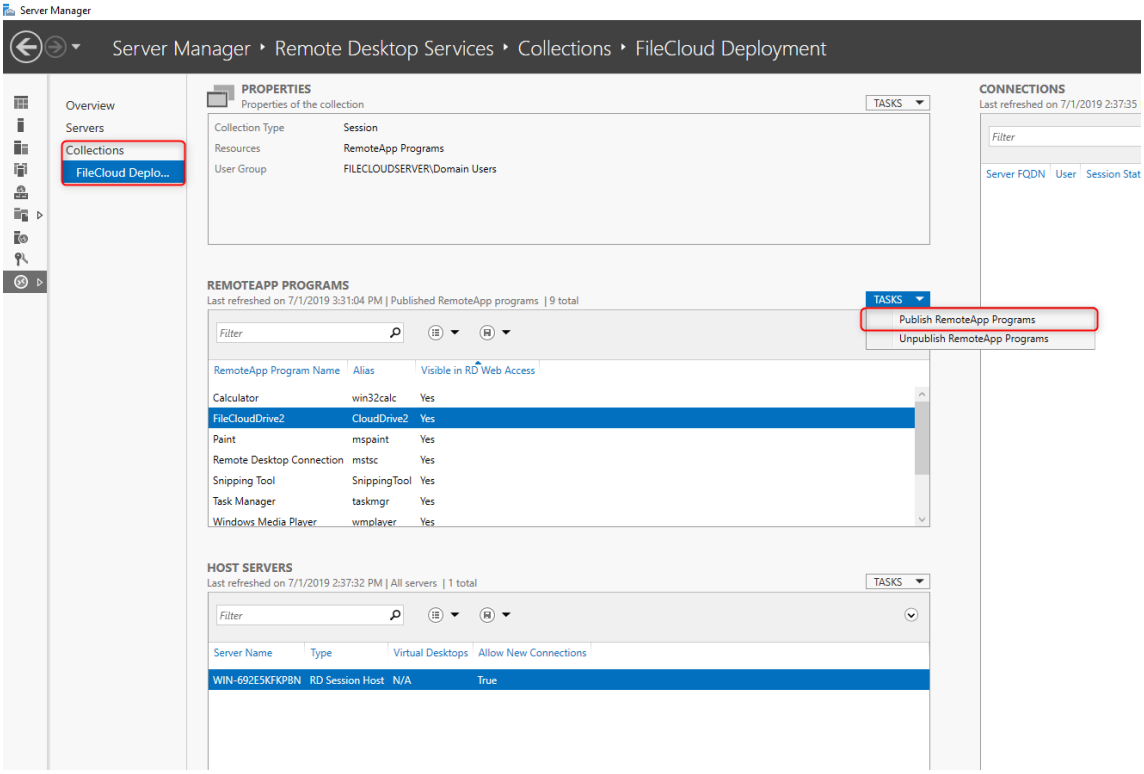


FileCloud Drive Remote Desktop Service Access

In order to provide access to remote users, install FileCloud Drive within the hosting Remote Desktop Service server, and then publish it.

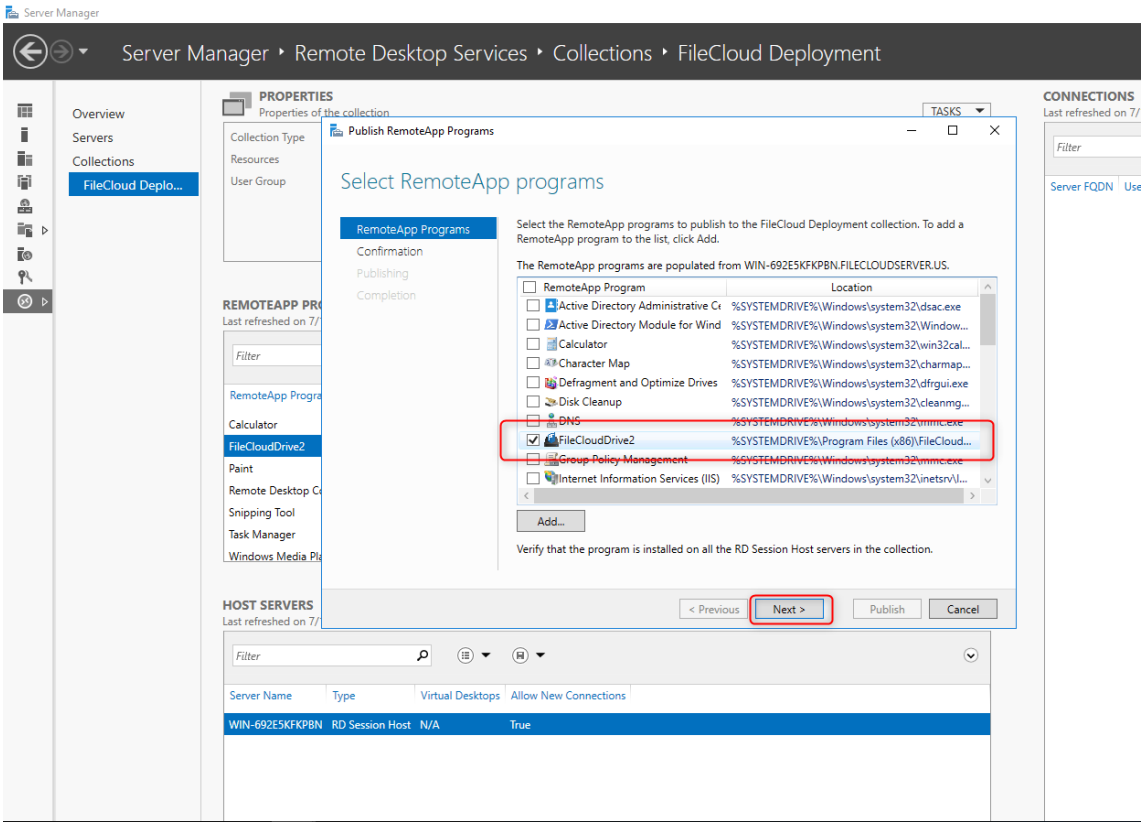
To publish FileCloud Drive:

1. Go to **Windows Server Manager > Remote Desktop Services> Collections**.
2. In the navigation panel, under **Collections**, choose your collection.
   In the image below, the selected collection is **FileCloud Deployment**.
3. Under **Remoteapp Programs**, in the **Tasks** drop-down list, choose **Publish RemoteApp Programs**.

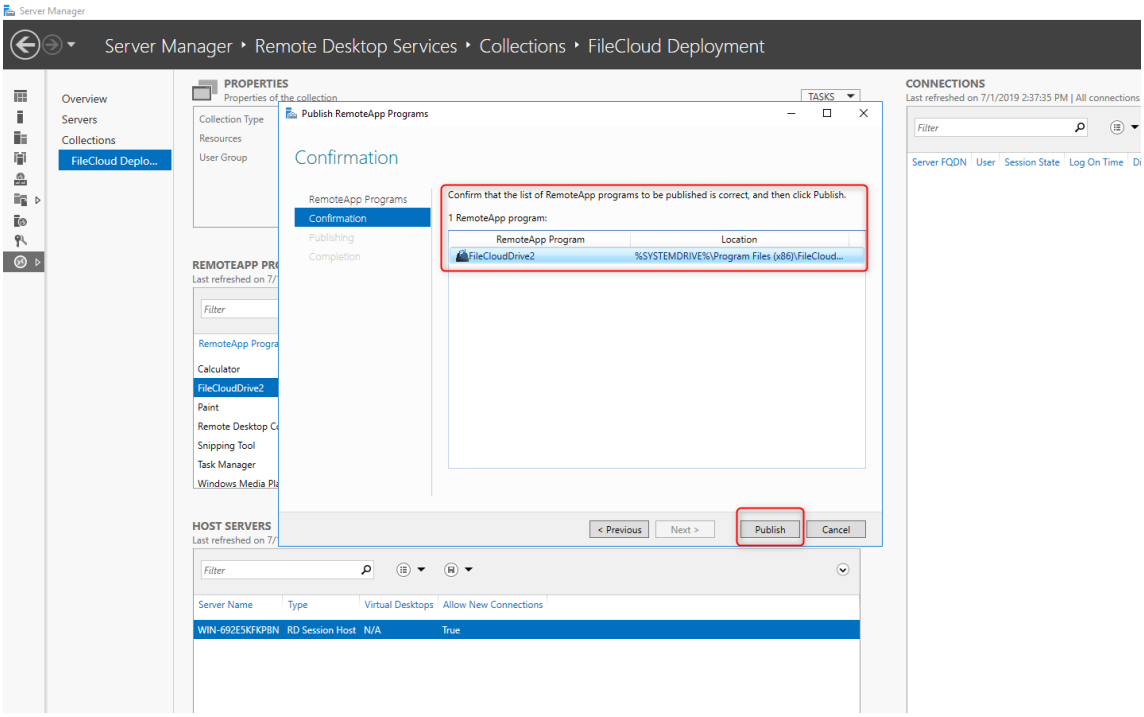


The Publish RemoteApp Programs dialog box opens.

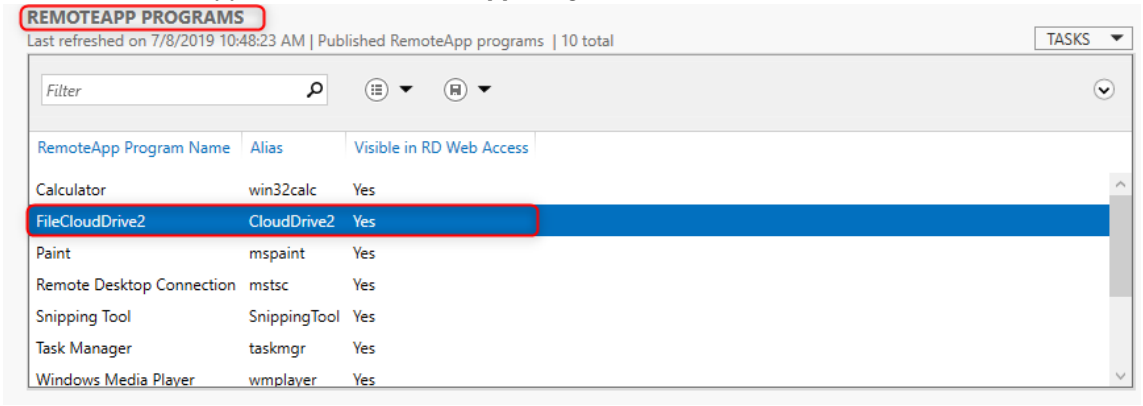
4. Select **FileCloudDrive2** from the list and click **Next.**



5. Then click **Publish**.



6. When publishing completes, close the window.
FileCloudDrive2 appears under **RemoteApp Program Name**.



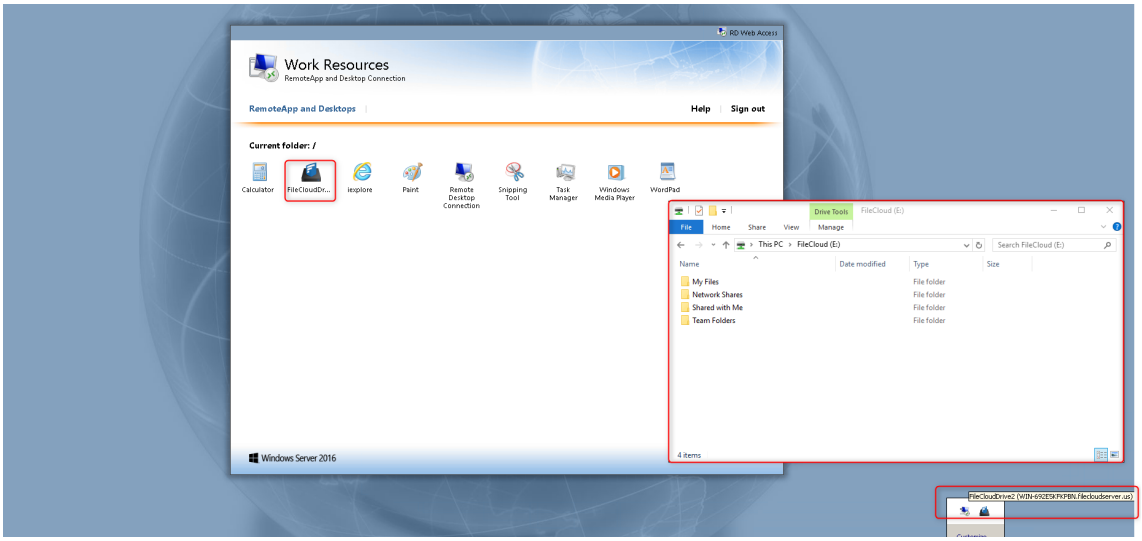
Accessing FileCloud Drive via Remote Desktop Web Access.

After you publish FileCloud Drive, if it is enabled in your **RemoteApp and Desktops** setup, your users will have access to it via Web.

To access FileCloud Drive via web:

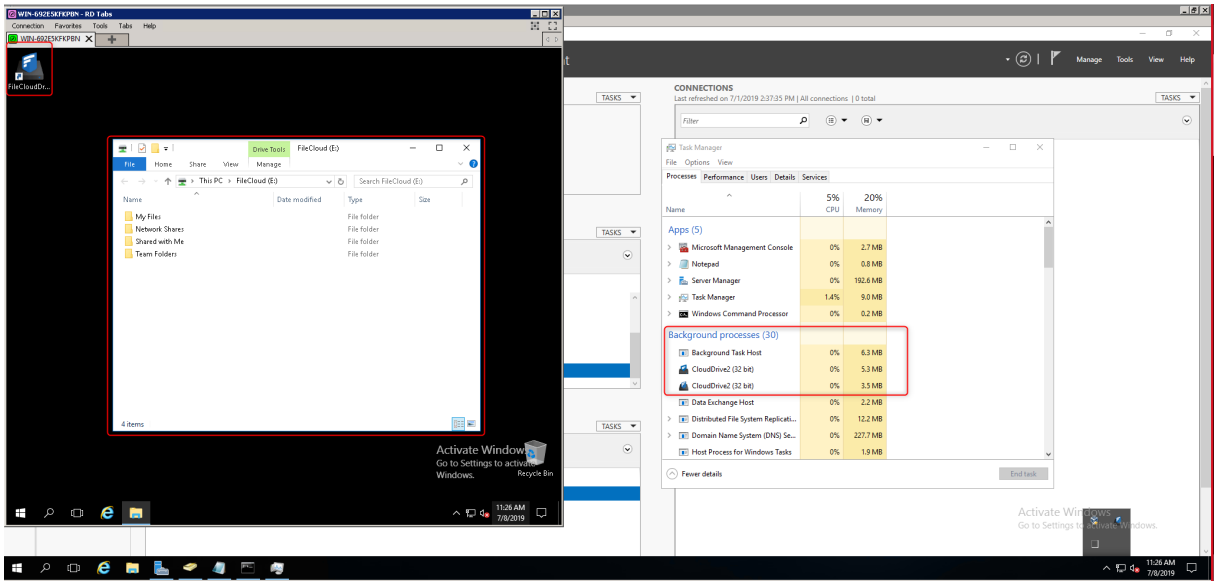
1. Enter the web IP or URL, and once authenticated, you will see **Work Resources** with FileCloud Drive listed.
2. To open a remote desktop protocol, click on the FileCloud Drive icon.

3. Click on a file to open it in FileCloud Drive.
   NOTE: You may be asked to authenticate your windows credentials as well as FileCloud Drive credentials on the first run.



Accessing FileCloud Drive via Remote Desktop

To access FileCloud via Remote Desktop, connect via RDP using the URL or IP provided by the system administrator, and authenticate with your username and password. Once done you will be able to access FileCloud Drive from within the virtual machine.



Troubleshooting Drive

Limitations:

- If Sophos Antivirus is installed, Drive application performance with large files (10MB+) is impacted.

FAQ - FileCloud Drive

Here are some of the Frequently Asked Questions (FAQ) about FileCloud Drive.

💡 Click on a link to expand it.

Why Are My Shortcuts Not Working?

There is a limitation to creating shortcuts to FileCloud Drive. When a user reboots their PC shortcuts no longer work because the map FileCloud Drive uses to build the path to your files is deleted when the PC reboots. You can create a new shortcut after you navigate through the application, and the map is recreated.

Which Special Characters Cannot Be Used in File and Folder Names?

Folder and file names cannot contain:

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

Why, when my computer is restarted, does Drive log me in as the previous log-in user?

By default, Drive automatically logs you in as the previous log-in user even after your machine is restarted.

Can I See a List of My Recent Activities?

How Do I Use a Proxy Server to Connect?

How Do I Lock Files that I Am Editing?

Can I Use Two-Factor Authentication to Connect?

Can I Upload Files Larger Than the Storage Quota?

Drive File Issues

Drive File Issues

FileCloud Drive may be unable to upload files and folders with the following naming characteristics.



These differ slightly for Drive for Mac.

Special Characters

FileCloud Drive doesn't upload some files with characters that are incompatible with certain operating systems.

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



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

The following file and folder names are also not uploaded.

- tonido.db
- Thumbs.db
- desktop.ini
- * .tmp*
- * .~tmp
- *.lnk
- Files or Folders ending with space
- Files or folders ending with "." or ","
- .tonidocache
- Anything starting with Conflict_
- sync.ico
- .ds_store
- Any hidden files (usually files starting with . in Linux and files with hidden attribute in windows)
- *.fuse_hidden
- *.crdownload
- *.partial
- *part
- *.download
- *.MACTF
- *.dwl
- *.dwl2

Issues with Uploading a File to Drive

Restrictions on filenames and file extensions

Please note the following restrictions when uploading files to FileCloud:

- Files with the same name:
  - If you upload a file with the same name and the same case as another file in the same folder, it overwrites the file.
  - If you upload a file with the same name but a different case than another file in the same folder, you cannot upload the file and the File Operations window displays a file name conflict message.
  - If you upload files with the same name but different file extensions, like **myfile.doc** and **myfile.docx**, they are treated as different files.
- FileCloud cannot upload files with leading spaces in the filename.
- By default, files with the extensions **php**, **php5**, **phar**, and **phtml** cannot be uploaded into FileCloud.

For Admins

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

Why can't I upload files larger than the storage quota to a Network Folder or Team Folder?

- To create a drive in Windows, FileCloud must specify a size.
- When FileCloud mounts a virtual drive, your storage quota is used as the size of the drive.
- This mechanism restricts uploading files larger than the total size of the drive.

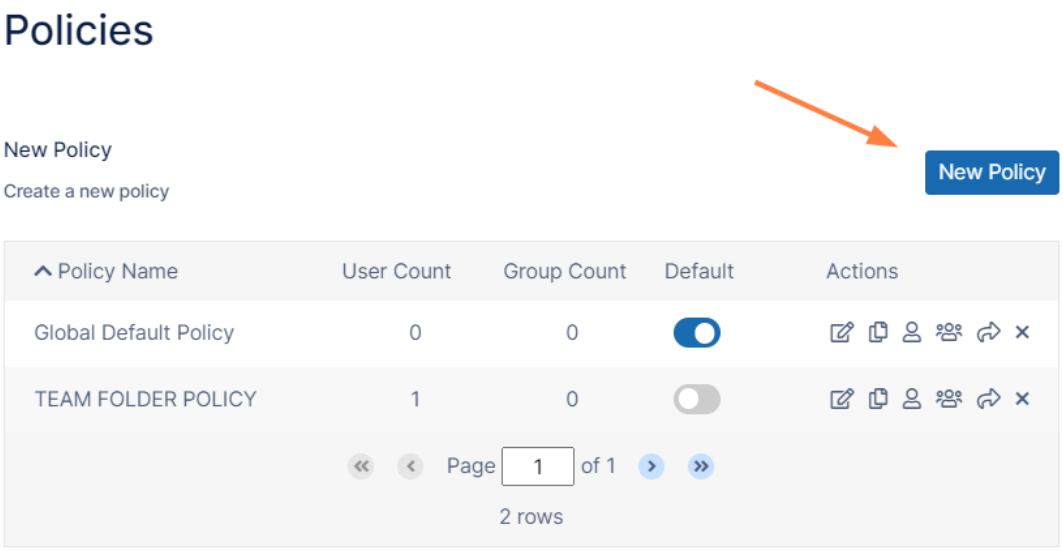
You must have Administrator privileges to reset your storage quota.
If you do not, please contact your administrator to change it for you.

If you need to change the storage quota for a particular user, you can edit their current policy settings or create a new policy.

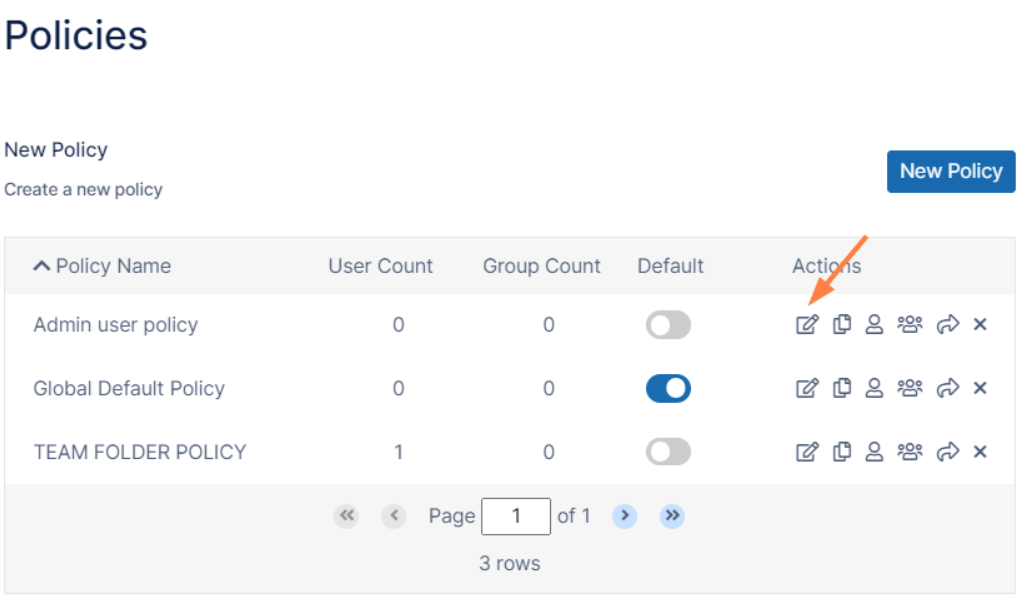
Administrators can read more about Setting the Storage Quota for Users

To change the upload limit and size of the drive by changing the User Storage Quota:

1. In the FileCloud admin portal's left navigation bar, scroll down and click **Settings**. Then, on the **Settings** navigation page, click **Policies**  .
   The **Policies** page opens.
2. Click the **New Policy** button.



3. In the **New Policy** dialog box, type in a name for the policy, and then click **Create**.
4. Click the edit button for the policy you just created.



5. On the **General** tab, change the **User storage quota**.
   To set unlimited storage quota for the user, set **User storage quota** to **0**.
6. Click **Save**.
7. From the left navigation pane, click **Users**.
8. On the **Manage Users** screen, click the user who you want to add to the new policy, and then click the edit button (

).

9. On the **User Details** screen, click **Manage Policy**.
10. On the **User Policy** screen, across from **Selected Policy** click **Select**.
11. On the **Policy List** page, select the policy you created for this user, and then click **Select**.
12. On the **User Policy** screen, click **Close**.
13. On the **User Details** screen, click **Save**.

To change the default storage size in Drive, please Contact FileCloud Support.

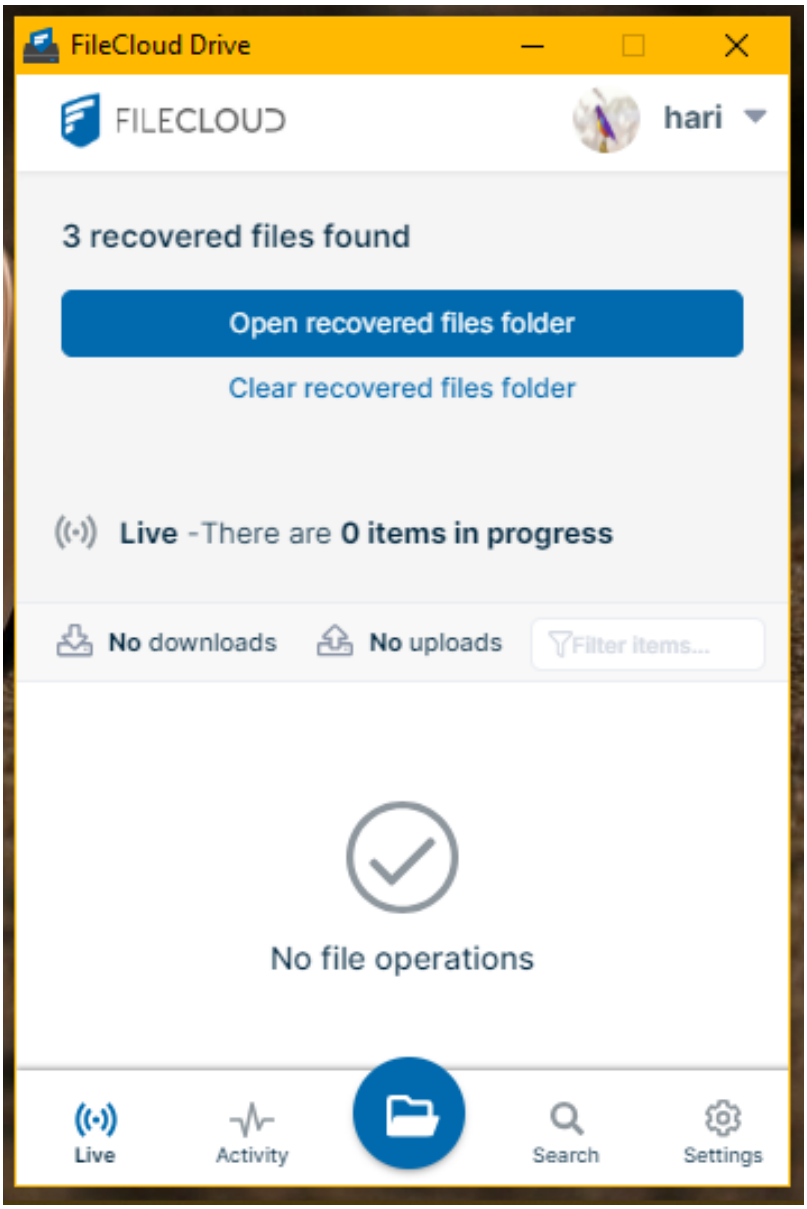
Recover Files After Interrupted Drive Uploads

In the following scenarios, an upload may be interrupted because of network issues or other reasons:

- saving documents using FileCloud Drive
- uploading files using FileCloud Drive

In these cases the uploaded file is saved to a Recovered folder.
If there are any recovered files in the **Recovered** folder, your **Live** screen alerts you and displays

an **Open recovered files folder** and **Clear recovered files folder** buttons.



To retry the upload:

1. Click the **Open recovered files folder** button.
   Your file explorer opens to the **Recovered** folder location.
2. Copy the interrupted file to the server and retry the upload.
   To avoid looping, first copy the files into another local directory (for example Downloads) and from there into the Drive folder for the upload.

To empty the Recovered folder:

- Click the **Clear recovered files folder** button.

Blank Error Messages in FileCloud Drive

Problem

In the following scenarios, FileCloud Drive users may see a blank error message when connecting:

Attempted Retry without Admin Intervention

1. A new device using FileCloud Drive tries to login to the FileCloud Server site.
2. An error notification appears without providing any text.
3. The FileCloud user clicks OK in the error message dialog box and then exits FileCloud Drive.
4. The user tries to open FileCloud Drive again.
5. An error notification appears without providing any text.

Attempted Retry with Admin Intervention

1. A new device using FileCloud Drive tries to login to the FileCloud Server site.
2. An error notification appears without providing any text.
3. The FileCloud user clicks OK in the error message dialog box and then exits FileCloud Drive.
4. The administrator logs on to the Admin Portal and deletes the device.
5. The user tries to open FileCloud Drive again.
6. An error notification appears without providing any text.

Cause

This is a known issue when all of the following conditions are set:

Condition	For more information
The Administrator enables and configures two-factor authentication	Enable Two-Factor Authentication
The Administrator creates and configures a workflow to block client access	Using Workflows
You are running FileCloud Server version 18.1 or earlier	FileCloud Server 18.1 Notes

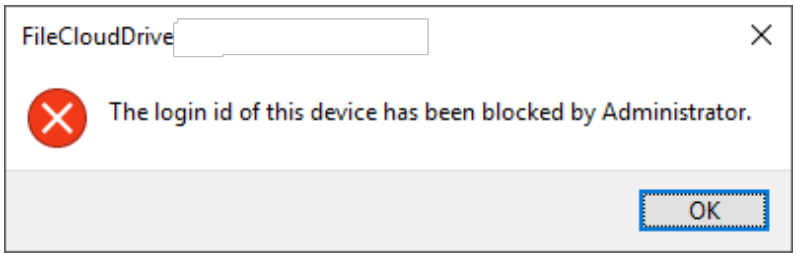
Resolution

This issue is fixed in FileCloud Server 18.2.

When the following conditions occur:

- The Administrator enables and configures two-factor authentication
- The Administrator creates and configures a workflow to block client access
- You are running FileCloud Server version 18.2 or later

The FileCloud Drive user now sees the error message with text:

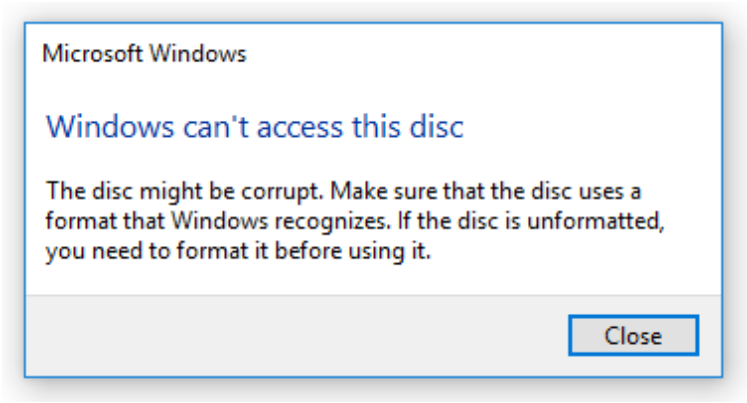


Upgrade FileCloud

Windows Can't Access This Disk in Drive

Problem

FileCloud Drive users may see the following error message when connecting:



Cause

In the following scenario:

1. The Administrator enables and configures two-factor authentication.
2. The Administrator creates and configures a workflow to block client access.

3. A new device using FileCloud Drive tries to login to the FileCloud Server site.
4. An error notification appears.

This error appears by design. It is the expected result when all of the following conditions are set:

Condition	For more information
The Administrator enables and configures two-factor authentication	Enable Two-Factor Authentication
The Administrator creates and configures a workflow to block client access	Using Workflows

Resolution

Administrators can explain to the user why the device is blocked by their company policies.

How to uninstall FileCloud Drive

FileCloud Drive can be uninstalled from Windows "Add/Remove Programs" widget.

FileCloud Drive for Mac

FileCloud Drive for Mac is entering the end-of-life process and will no longer be available for download as of October 1, 2024. Support will no longer be available as of March 31, 2025. For more information, see https://www.filecloud.com/end-of-life-policy.

FileCloud Drive versions below 23.1.2 do not support macOS 14 (Sonoma). If you are using macOS 14, please install or upgrade to FileCloud Drive 23.1.2 or higher.

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

FileCloud Drive version 21.1 and higher supports Catalina and Big Sur.

Please note that for Drive running on Apple Silicon M1, Big Sur 11.3 or higher is required and security settings have to be adjusted.
See FileCloud Drive: Configuration for Big Sur 11.3 or later versions Running on Apple Silicon.

FileCloud Drive for Mac is a client application available for macOS (Catalina and later).

It allows you to access your FileCloud server files like you would access any other files in Mac through the Mac Finder. The files can be edited from and saved directly to your FileCloud server

About FileCloud Drive for Mac

Beginning with FileCloud 23.1, Drive for Mac includes FileCloud for Office.

Although FileCloud Drive for Mac makes your remote FileCloud server files available as if it is a local drive in your MacOSX Computer, it is important to understand the underlying technology powering FileCloud Drive so that you can use it most efficiently for it's intended purpose.

FileCloud Drive for Mac provides a virtual view to your FileCloud files and makes it appear as if the files are actually local, but in reality they are not. The files are present on the remote server and if the underlying network connection is not available, FileCloud Drive for Mac cannot work. So in cases when

you are going to be offline and want access to your files, FileCloud Drive for Mac is not a suitable tool and it is recommended to use the FileCloud Sync app instead which keeps a copy of the remote server files locally on your computer.

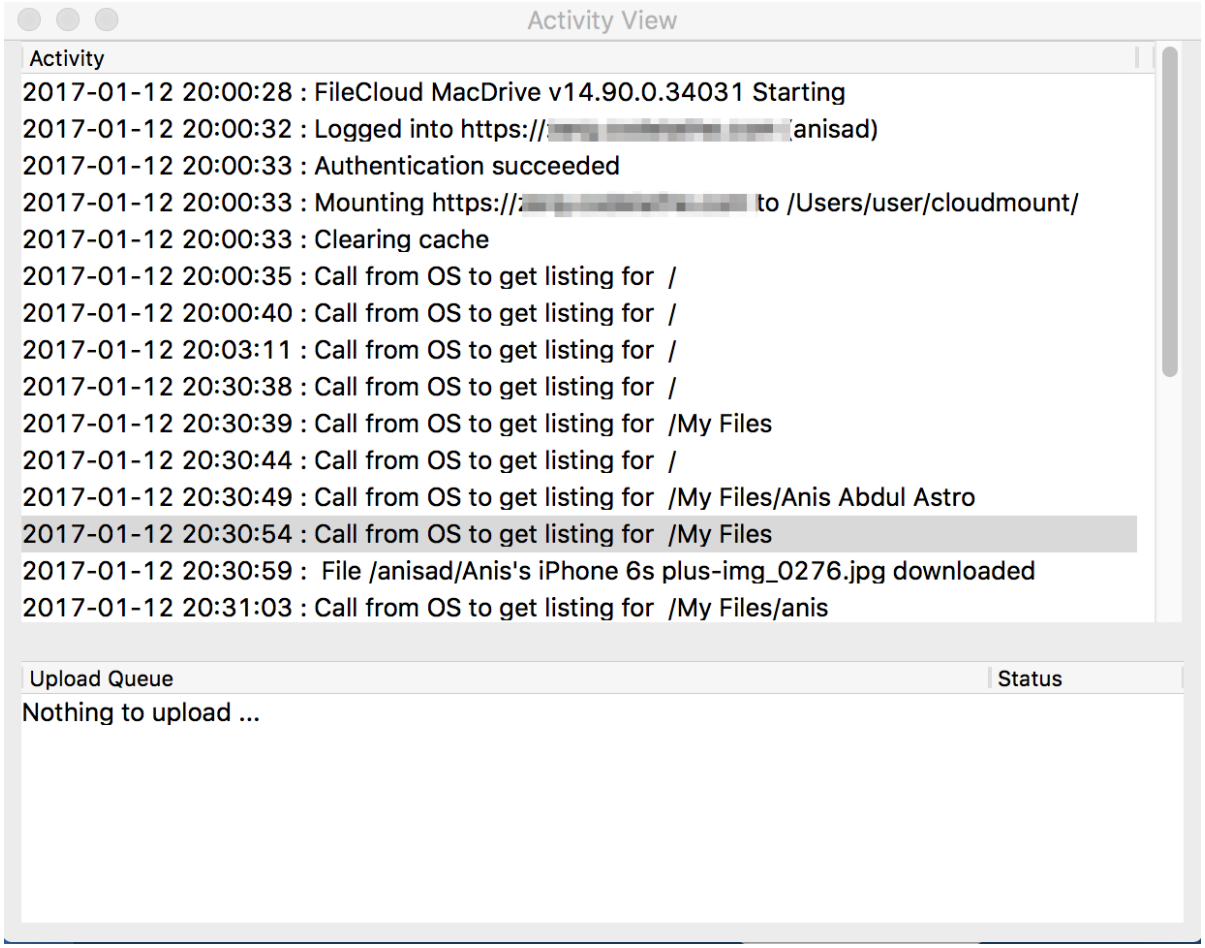
Also, note that when you have a large file (for example, 1 GB) and you try to open it in an application via FileCloud Drive for Mac, it will first have to be downloaded from the remote connection and then opened. Depending upon your network connectivity this could take a while. So even though these files appear connected to your MacOSX, they are in reality in the FileCloud server.

So it is best to use FileCloud Drive for Mac to work with small to medium sized files, to edit documents and use it for uploading small number of files or downloading small documents etc. FileCloud Drive for Mac is more convenient than using the web portal to edit files because it avoids downloading the file first, editing and then re-uploading it back. This can be done seamlessly by just opening the document in the application via explorer, editing and then saving it to upload it back to the FileCloud.

Viewing FileCloud Drive for Mac Activity

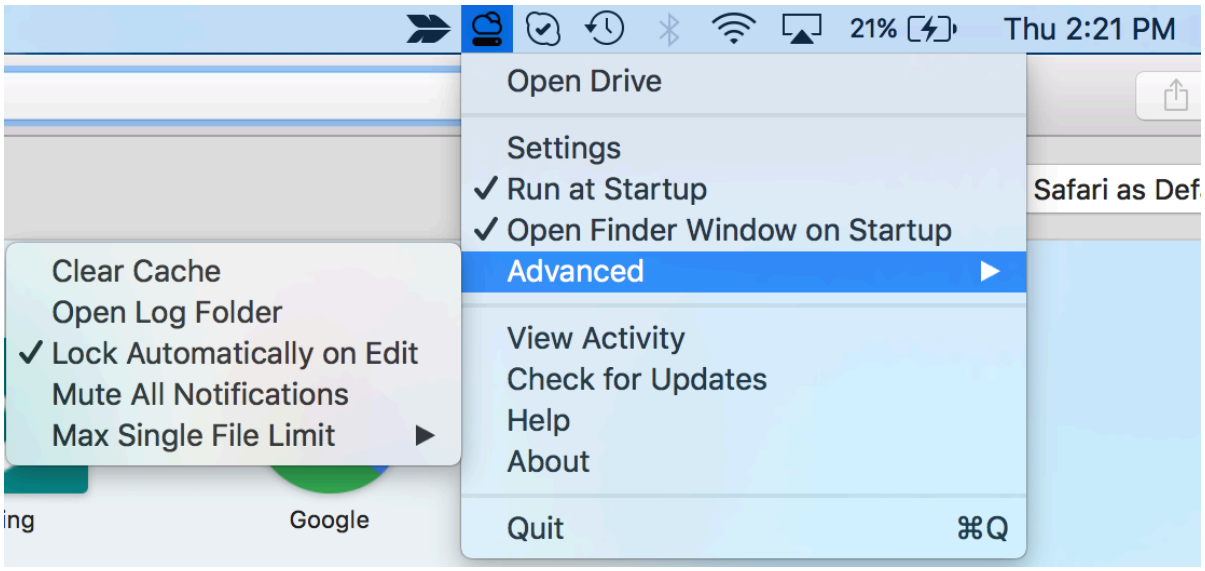
FileCloud Drive for Mac provides a way that shows the activities being performed by FileCloud Drive for Mac and this provides "under the hood" view.

Select the "View Activity" option in FileCloud Drive for Mac task bar menu



FileCloud Drive for Mac Menu Options

This section describes the various menu options in FileCloud Drive for Mac.

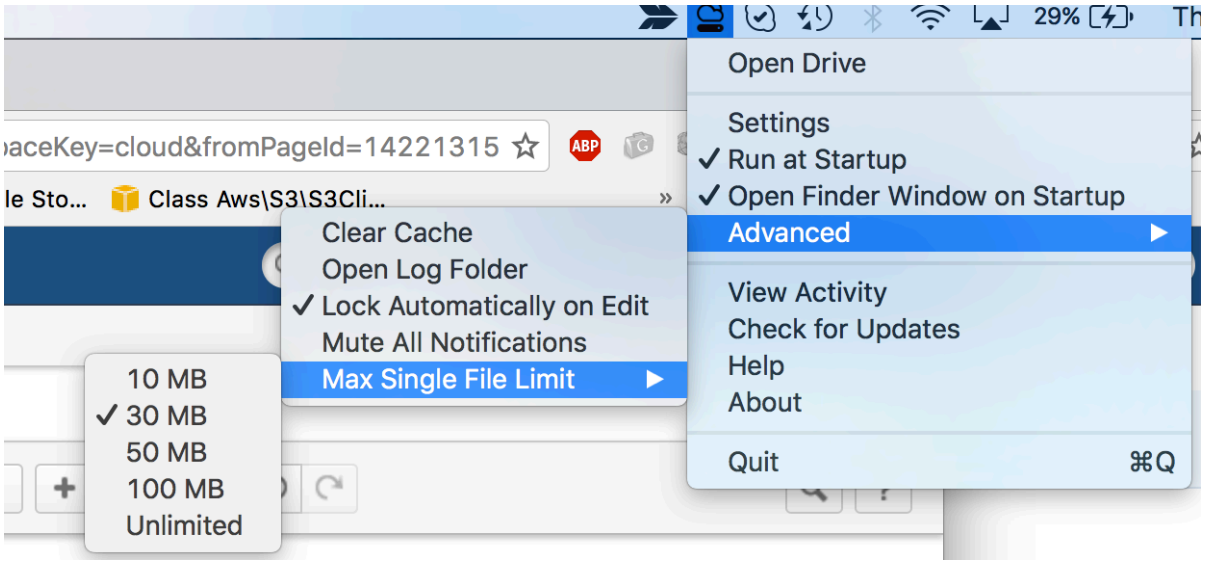


Open Drive	This will launch a finder window to the mounted drive volume. If the remote server is not available or configured then nothing will be launched
Settings	This will display the dialog window to input new server information. If a server is already mounted, then it will be first unmounted and the new server will be mounted.
Run at Startup	This will start FileCloud Drive for Mac automatically when the user logs into the computer.
View Activity	Open a window that shows the current activity as well as transfer details
Check for Updates	This will check if there is a newer version of FileCloud Drive for Mac is available
Help	Launch browser to open online documentation
About	Display version information
Exit	Unmount and exit FileCloud Drive for Mac application

Clear Cache	FileCloud Drive for Mac stores locally accessed file in a local cache. This cache location will be cleared when this option is selected and the volume will be remounted. Any further access to files will cause FileCloud Drive for Mac to download it first. Care must be taken to make sure there are no existing application are actively using files during this operation.
Open Log Folder	This option will launch explorer window to the location containing FileCloud log files. This is used for debug purposes.
Lock Automatically on Edit	This option will lock a file on file open action and will unlock a file on file cloud action. **NOTE this function is a file system level behaviour and FileCloud Drive CANNOT KNOW IF A FILE IS OPENED IN AN APPLICATION AFTER THE CONTENTS ARE READ**. This also attempts to detect special cases such as Microsoft Office apps and will attempt to keep the lock enabled when a document file is edited but changes in behaviour to MS Office apps can affect this algorithm.
Mute All Notifications	FileCloud Drive for Mac will try to show notifications on various conditions and selecting this option will prevent those notifications from being displayed
Max Single File Limit	FileCloud Drive for Mac will cache a file locally when windows explorer requires it (Typically Finder will try to pre-cache files for quicker access or to display thumbnails or previews). The files are also cached on file open/copy operations. This option will set a limit to max file size that can be accessed. This is primarily meant to manage bandwidth usage .

How Can I Increase File Size Limits for FileCloud Drive for Mac?

FileCloud Drive for Mac downloads a file from server before it can be read/modified/updated FileCloud Drive for Mac. MacOSX can prefetch files to improve user experience and can request files that are not actively used . This can sometimes cause bandwidth usage. To limit this, FileCloud Drive for Mac has maximum file size limit setting to prevent downloading large files. This limit is set to 30MB by default. You can change this value from the FileCloud Drive for Mac context menu.

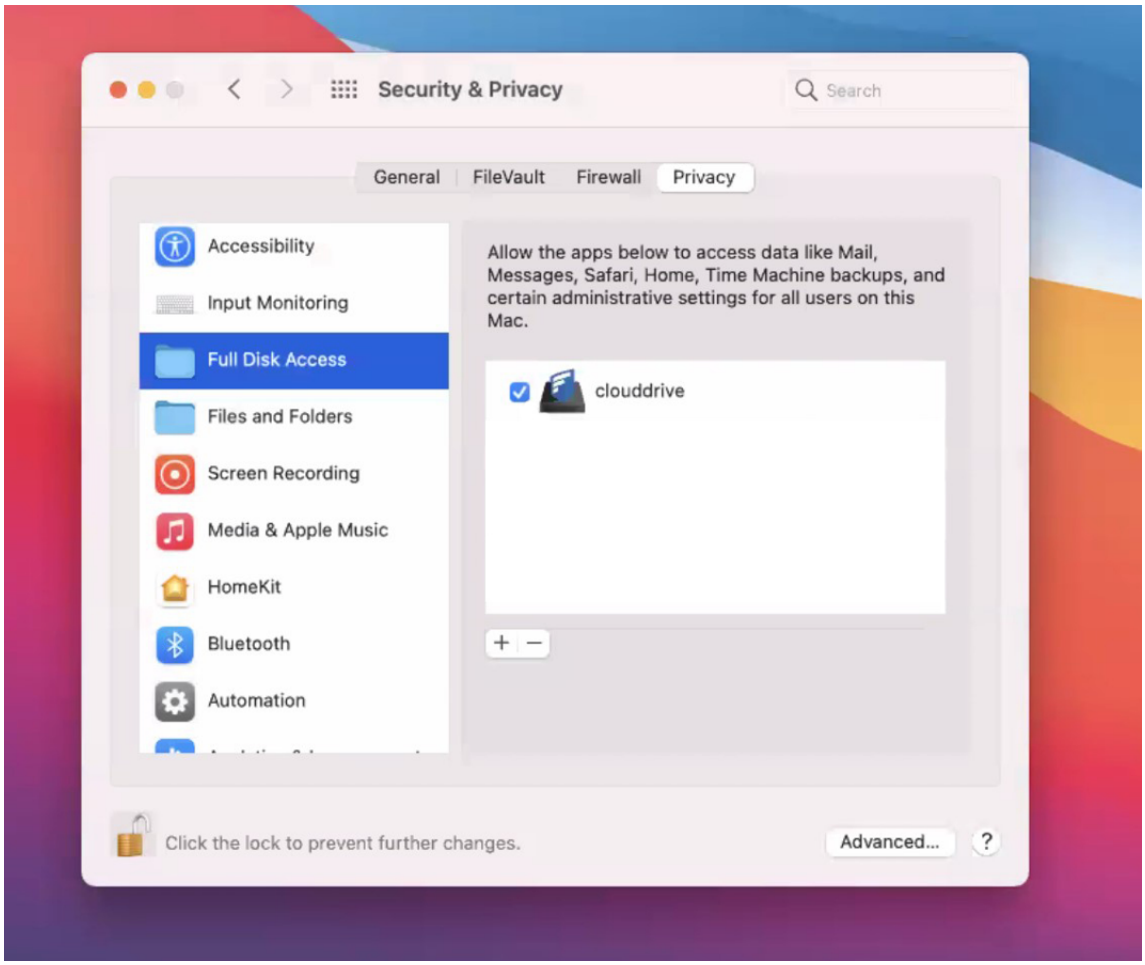


How to Fix Problems Uploading Large Files

If you are trying to upload a file of 3-5 GB to Drive for Mac and see an error message or a Waiting to Start message that doesn't disappear, you may be able to resolve the problem by granting Drive full disk access.

To enable full disk access:

1. Go to **System Preferences > Security and Privacy**.
2. Click the **Privacy** tab.
3. Click **Full Disk Access** in the left panel.
4. If the **CloudDrive** application does not appear in the window, click the **+**, and add it.



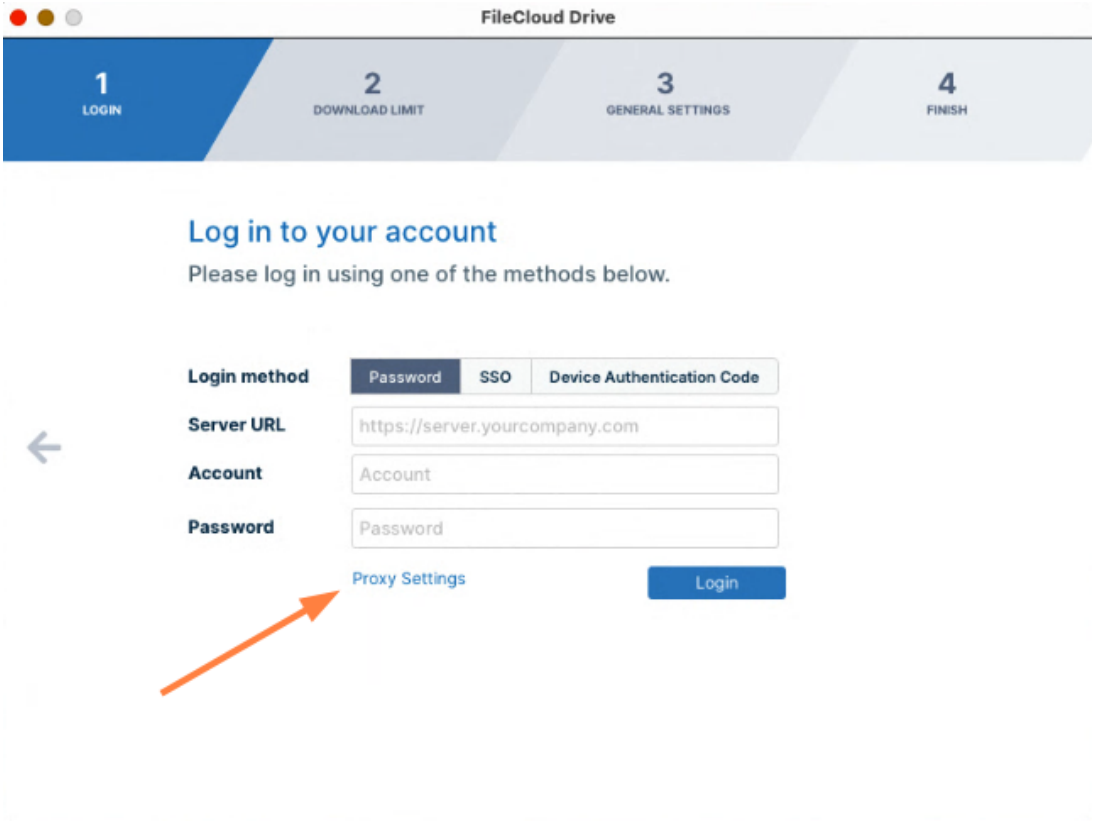
Drive now has full disk access.

Proxy Server for FileCloud Drive for Mac

FileCloud Drive for Mac can use proxy server to connect with FileCloud server.

The information should be supplied when you log in to Drive for Mac.

1. Click **Proxy Settings** to open the Proxy settings dialog box.



The **Proxy settings** dialog box opens.

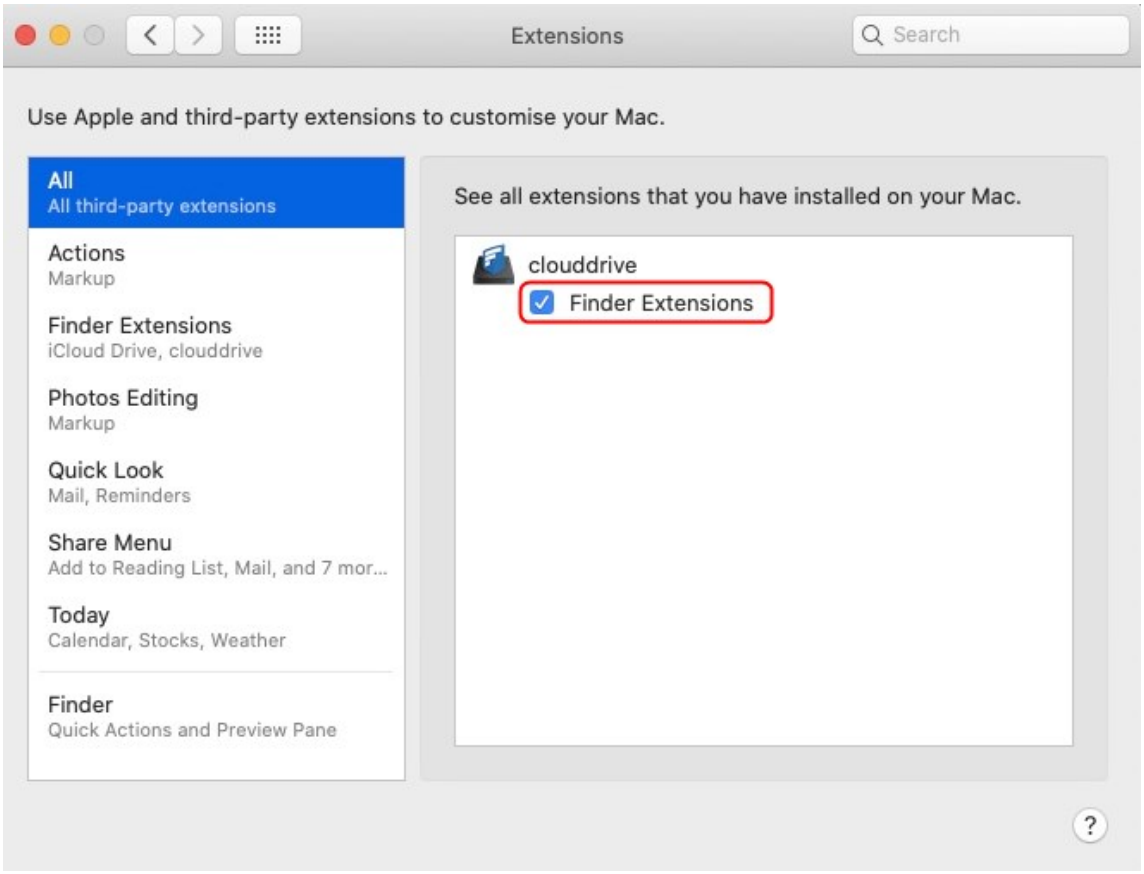
2. Fill in the fields and click **Save**.
3. To log in to FileCloud, click **Login**.

Enable Right-Click Support in Drive for Mac

Starting in FileCloud Version 20.1, you can enable right-click support in Drive for Mac.

To enable right-click support in Drive for Mac:

1. Start FileCloud Drive for Mac.
2. Click the Apple logo in the top left corner of the page and choose System Preferences > Extensions.
3. In the left pane, click **All**.
4. Under **clouddrive**, check the box for **Finder Extensions**.



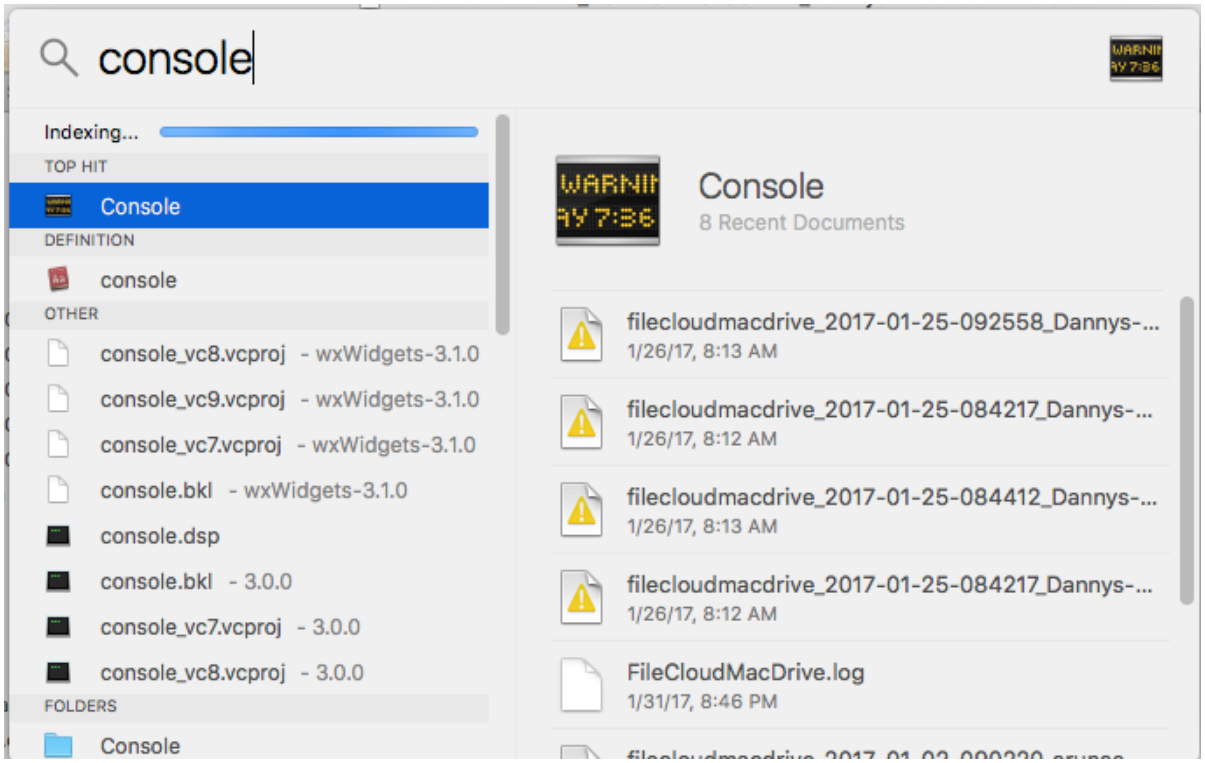
5. To relaunch Finder, click the Apple logo in the top left corner of the page and choose Force Quit -> Finder -> Relaunch.
6. Restart your computer.
7. Start FileCloud Drive for Mac again.

Viewing a Crash Report for Drive for Mac

In addition to log file, if the app exits without user intervention, a crash report file is also very useful.

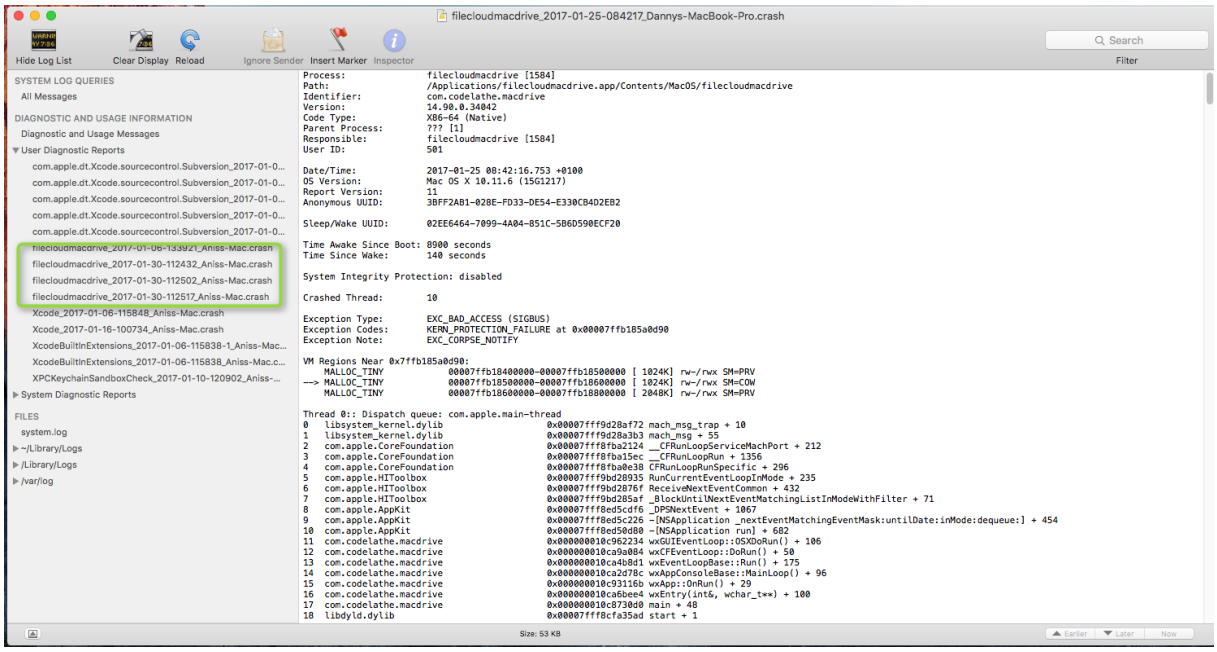
To get the crash report file:

1. In the Spotlight window, type "console"

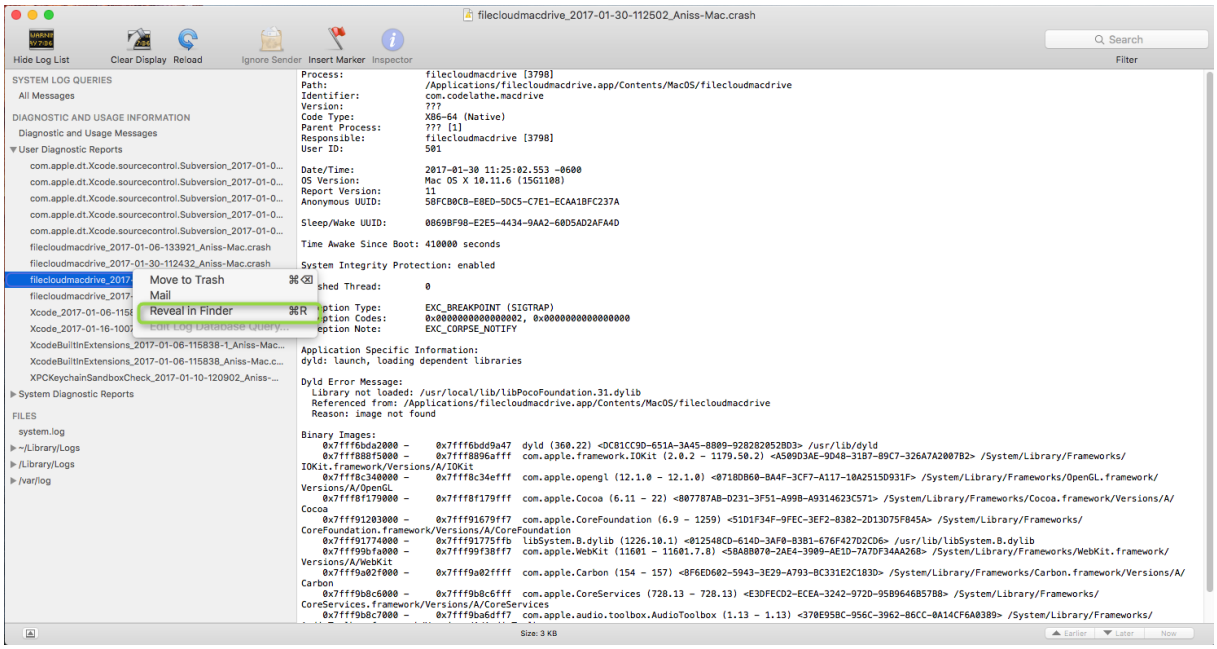


2. Locate the "User Diagnostic Reports" section.

3. Expand the User Diagnostic Reports section and locate the report that starts with "filecloudmacdrive" and the latest time stamp.



4. Right click the report and select "Reveal in Finder" and email that file.



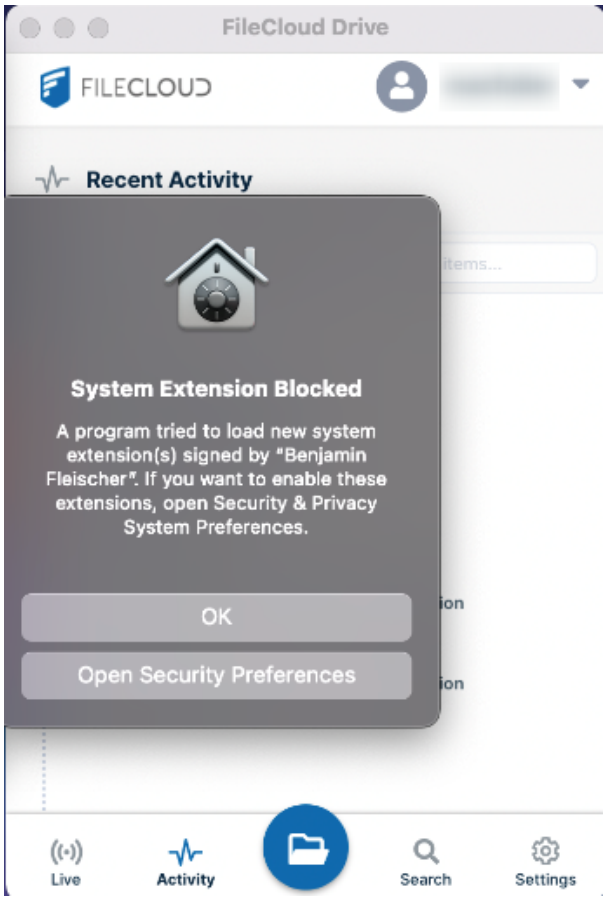
FileCloud Drive: Configuration for Big Sur 11.3 or later versions Running on Apple Silicon

Beginning in FileCloud Version 21.1, Drive supports using Big Sur versions 11.3 and higher. However, you must configure a workaround for FileCloud to run the kernel extension (kext) that Drive uses.
Note that prior to version 21.1, Drive does not support Big Sur 11.3 or later versions.

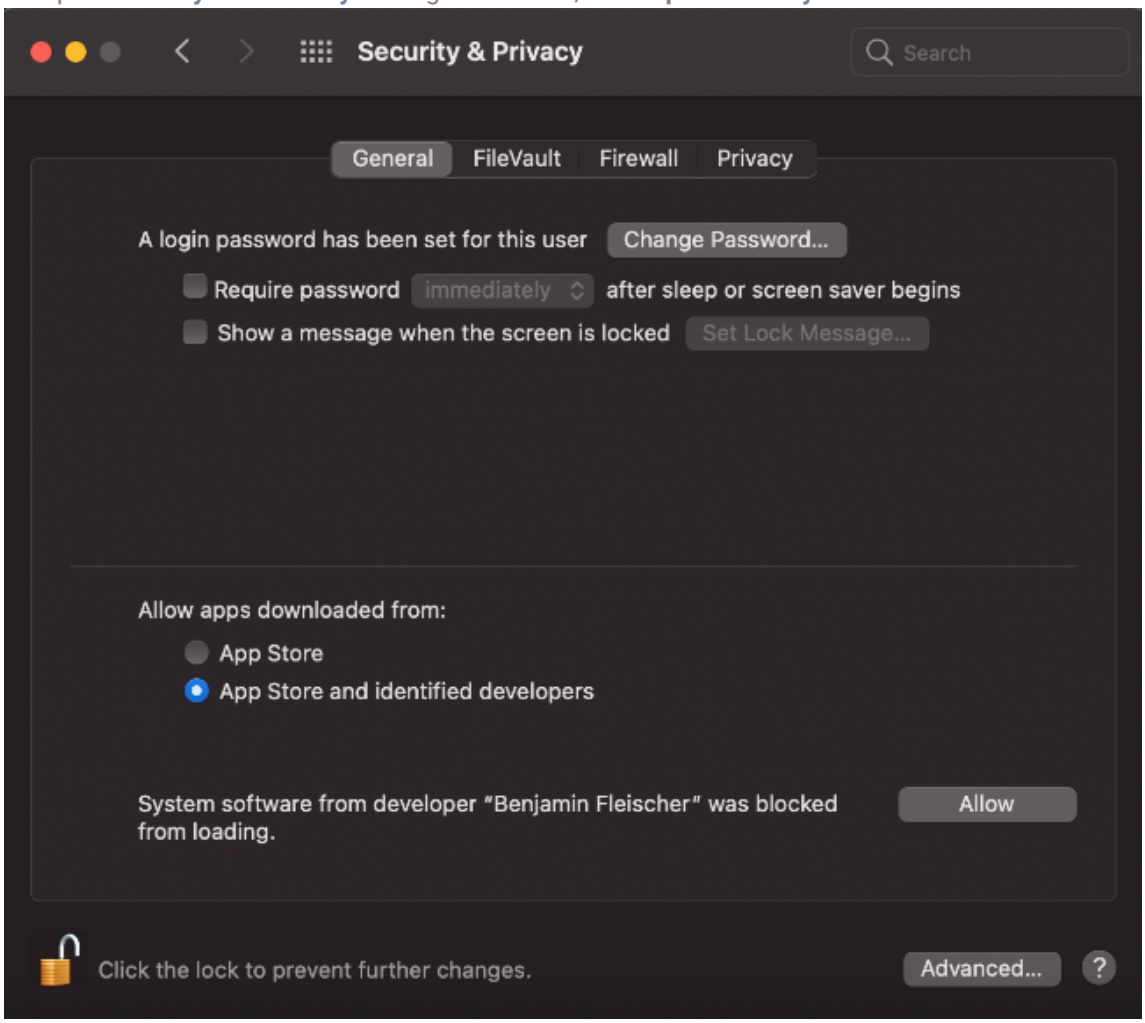
To configure FileCloud Drive to use Big Sur 11.3 or later versions running on Apple Silicon:

1. Follow the instructions in macOS User Guide to change the level of security used on your startup disk to **Reduced Security**.
2. Install Drive for Mac.
   When Drive attempts to start, the message **System Extension Blocked** appears.

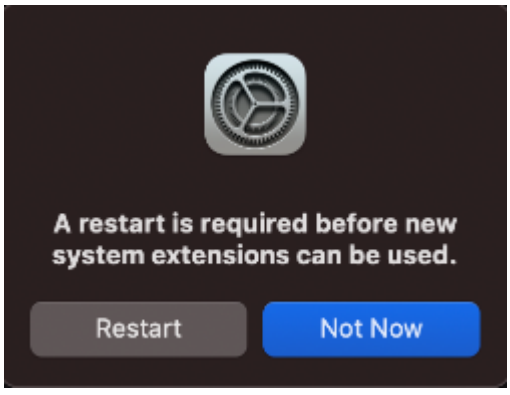
   Note: If you see the message, **"FileCloudDrive" can't be opened because Apple cannot check if for malicious software**, see the workaround below.


FileCloud Drive
FILECLOUD
Recent Activity
System Extension Blocked
A program tried to load new system extension(s) signed by "Benjamin Fleischer". If you want to enable these extensions, open Security & Privacy System Preferences.
OK
Open Security Preferences
Live
Activity
Search
Settings

3. To open **Security and Privacy** settings in MacOS, click **Open Security Preferences**.



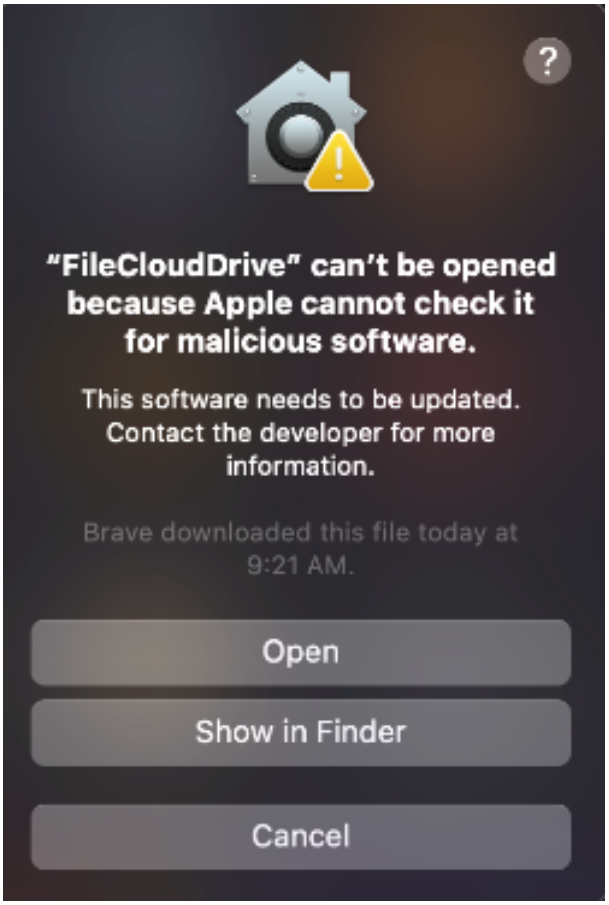
4. Click **Allow.**



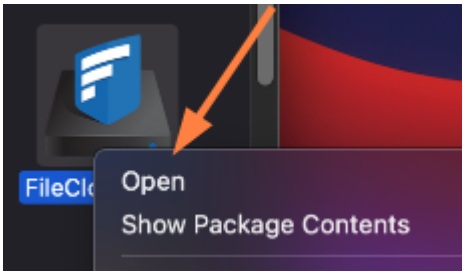
5. Click **Restart**.
6. When MacOS restarts, you can start Drive normally.

Workaround

If you see this message when Drive initially attempts to open:



a. On the Drive icon, click **CTRL + right-click** and choose **Open.**



Drive opens.

b. Reboot your system.

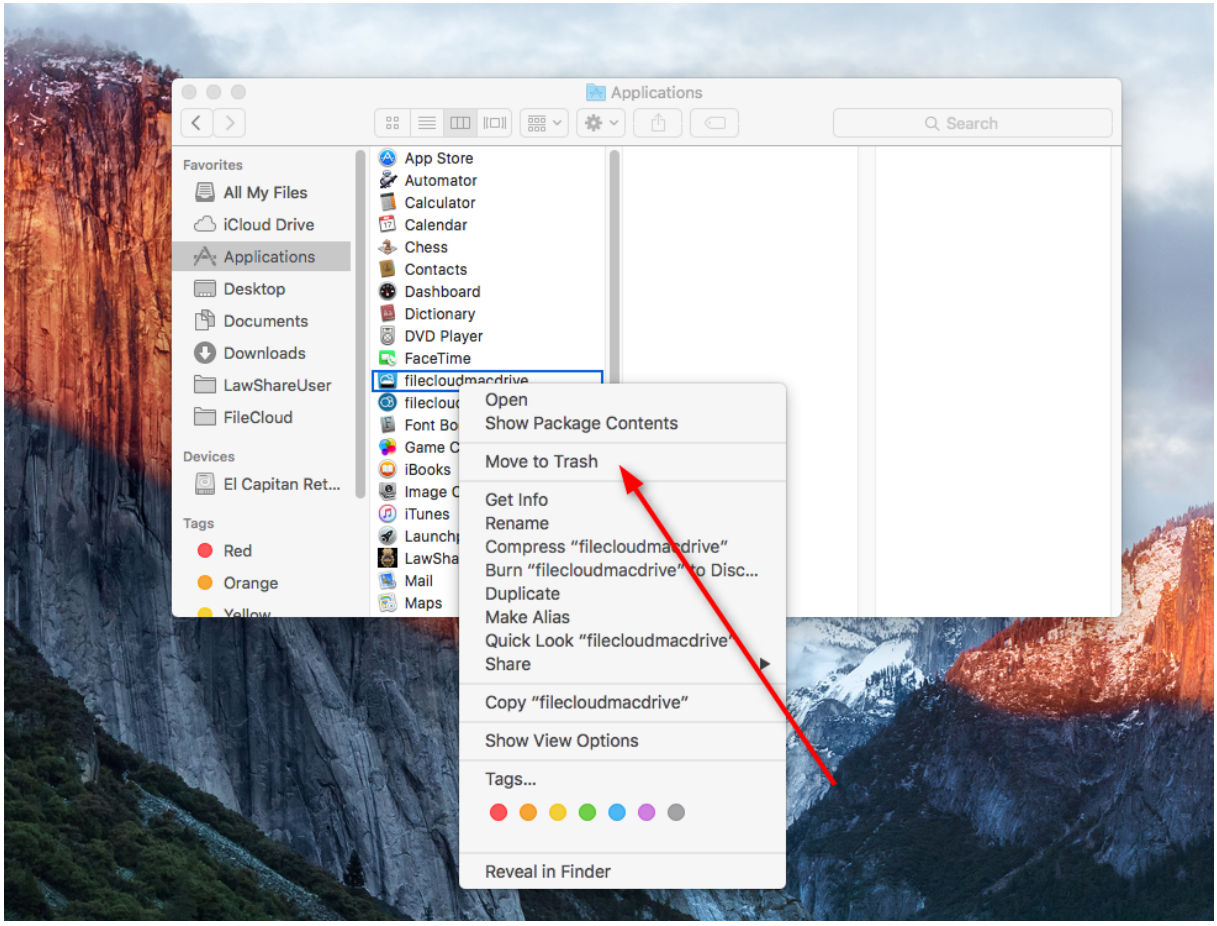
c. Attempt to open Drive again.

You should now see the **System Extension Blocked** message shown in Step 2, above, and can proceed to Step 3.

How to uninstall FileCloud Drive for Mac

To uninstall FileCloud Drive for Mac, first you have to quit the Drive app.

Then navigate to Applications, select Filecloud Drive for Mac and click Move to Trash.



To clear the data of FileCloud Drive for Mac, please Contact FileCloud Support.

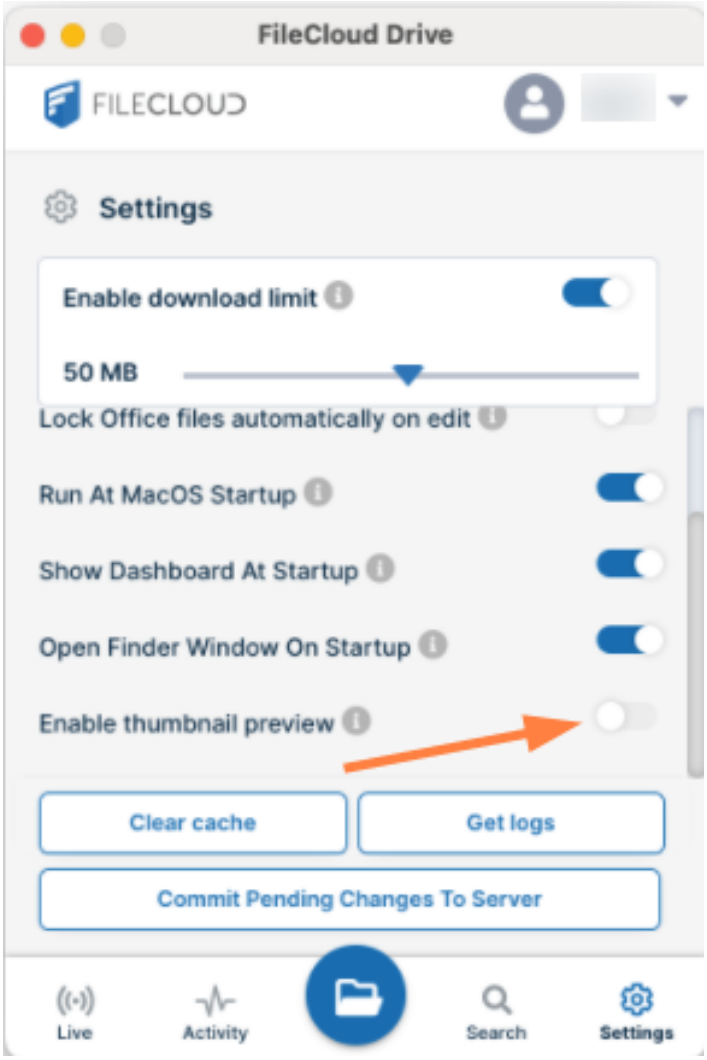
Enabling Thumbnail Previews in Drive for Mac

Drive for Mac must download all content within a folder in order to generate a thumbnail. To avoid potential performance issues, thumbnail previews are disabled by default in Drive for Mac, and files are only downloaded when selected. However, thumbnail previews may be enabled in Drive for Mac manually.

To enable thumbnail previews in Drive for Mac:

1. Log in to Drive for Mac.
2. At the bottom of the Drive dashboard, click the **Settings** button.

3. Click the **Enable Thumbnail Preview slider** (so that it appears blue).



MacDrive file issues

FileCloud MacDrive may be unable to upload files and folders with the following naming characteristics.

Filename length limit

The MacOS operating system only allows file names of 255 characters or less.

Special Characters

FileCloud Drive doesn't upload some files with characters that are incompatible with certain operating systems.

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

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

The following file names are also not uploaded.

- tonido.db
- Thumbs.db
- desktop.ini
- *.tmp*
- *.~tmp*
- *.lnk
- Files or Folders ending with space
- Files beginning with a space
- Files or folders ending with "." or ","
- .tonidocache
- Conflict_*.*
- sync.ico
- .ds_store
- Any hidden files (usually files starting with . in Linux and files with hidden attribute in windows)~*
- ~*
- *.fuse_hidden
- *.crdownload
- *.partial
- *.part
- *.download*
- *.MACTF
- *.dwl
- *.dwl2

The following folder is not uploaded



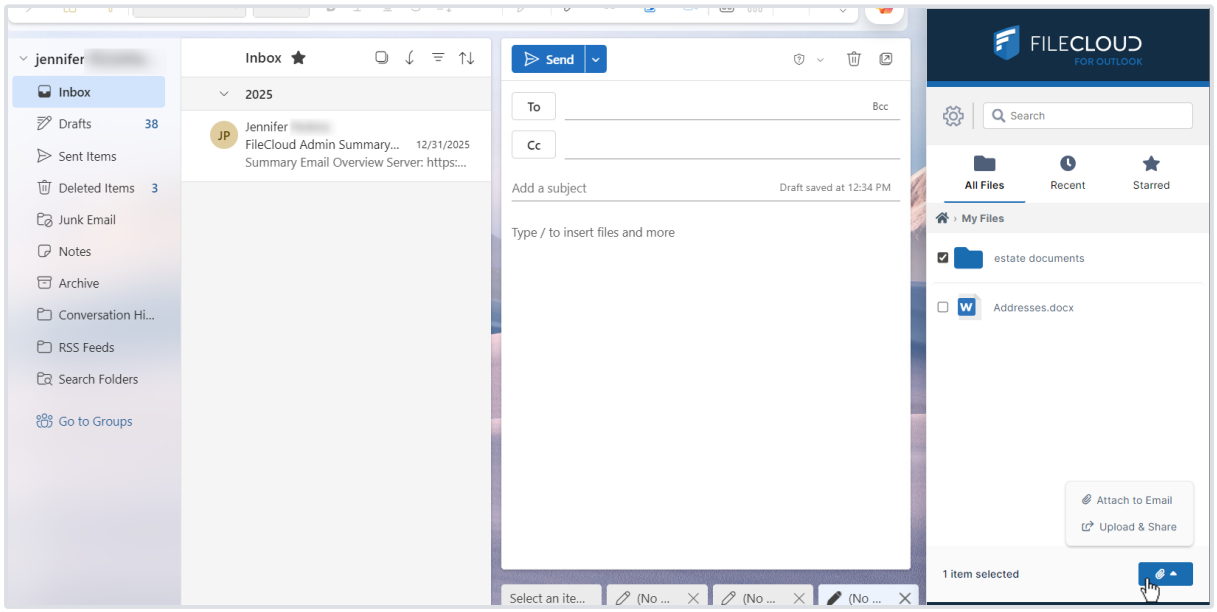
.sb-

FileCloud for Outlook Add-In

FileCloud for Outlook enables you to save Outlook email attachments to FileCloud and attach FileCloud files to Outlook emails as attachments or share links.

FileCloud for Outlook is available in:

- Windows and macOS
- the classic and the new Outlook interfaces
- Outlook desktop and Outlook Web



FileCloud for Outlook can only be opened from within an email, either one you are composing or one you have received. The add-in appears as a side panel to the right of the email.

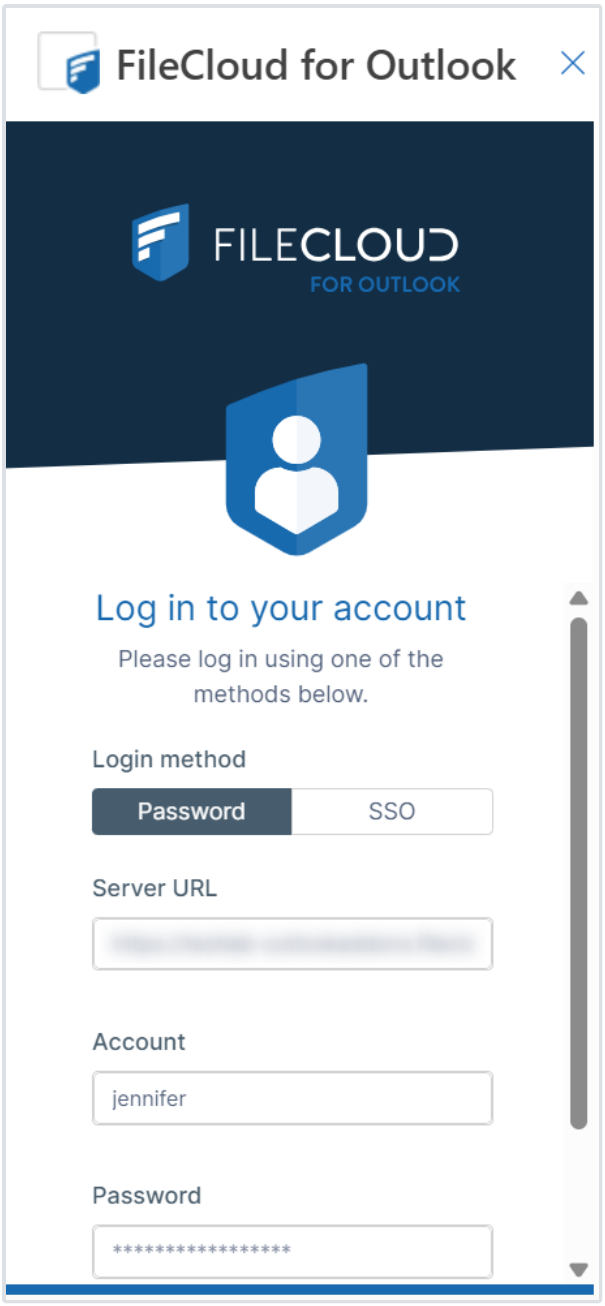
To install FileCloud for Outlook, see Installing the Outlook Add-In .

Logging in to FileCloud for Outlook

When you open FileCloud for Outlook, if you are not already logged in to FileCloud, you can log in through the add-in.
You can log in by entering your FileCloud server address, username, and password, or if it is enabled, you can click the SSO tab and log in using SSO. If MFA is enabled, you are prompted to log in using MFA.

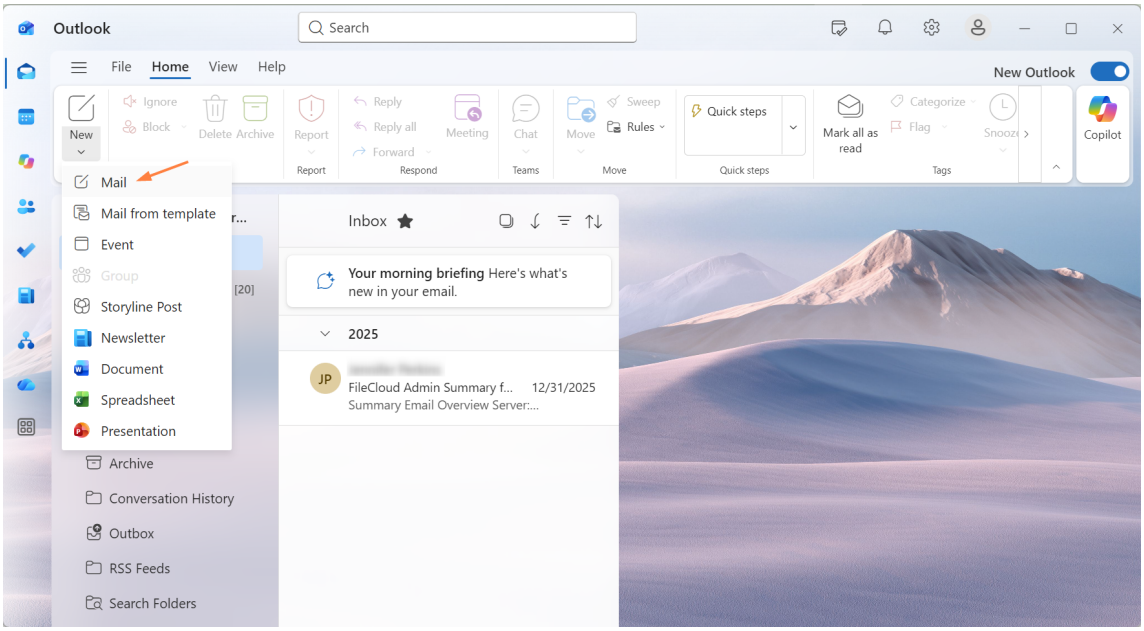
If you are accessing Outlook through Google Chrome and signing in with SSO, you must disable **Local Network Access Checks**.
To disable Local Network Access Checks in Chrome:

1. Enter the web address:
   chrome://flags/#local-network-access-check
2. Change the setting for **Local Network Access Checks** to **Disabled**.
3. Restart Google Chrome.



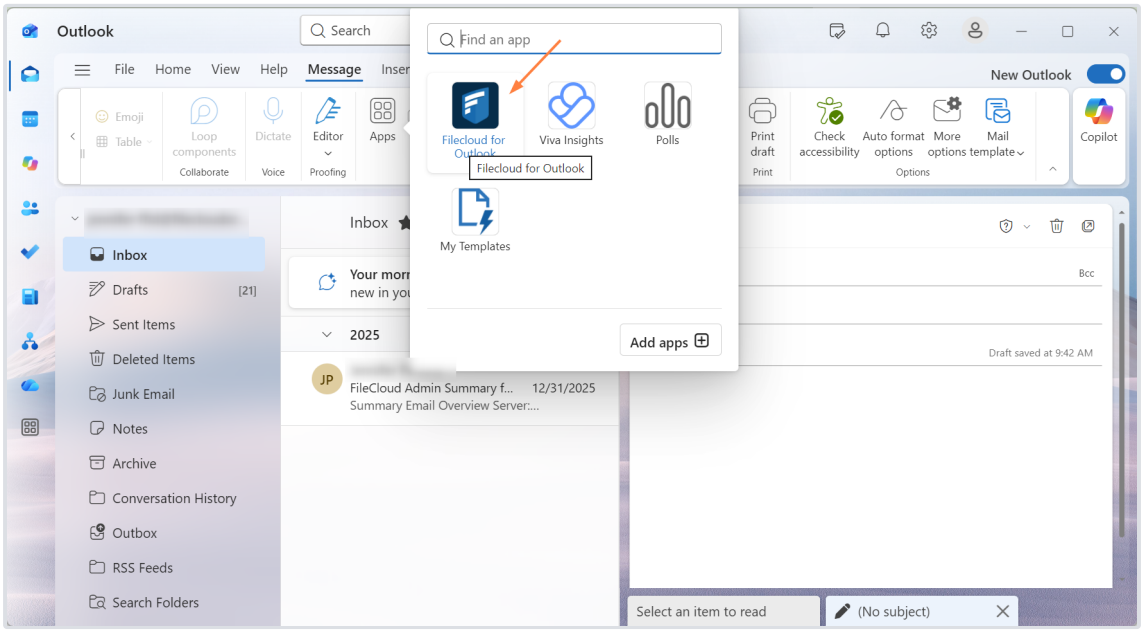
Opening FileCloud for Outlook from an email

1. Open Outlook.
2. Click **Home** in the menu bar, and then click **New mail.**



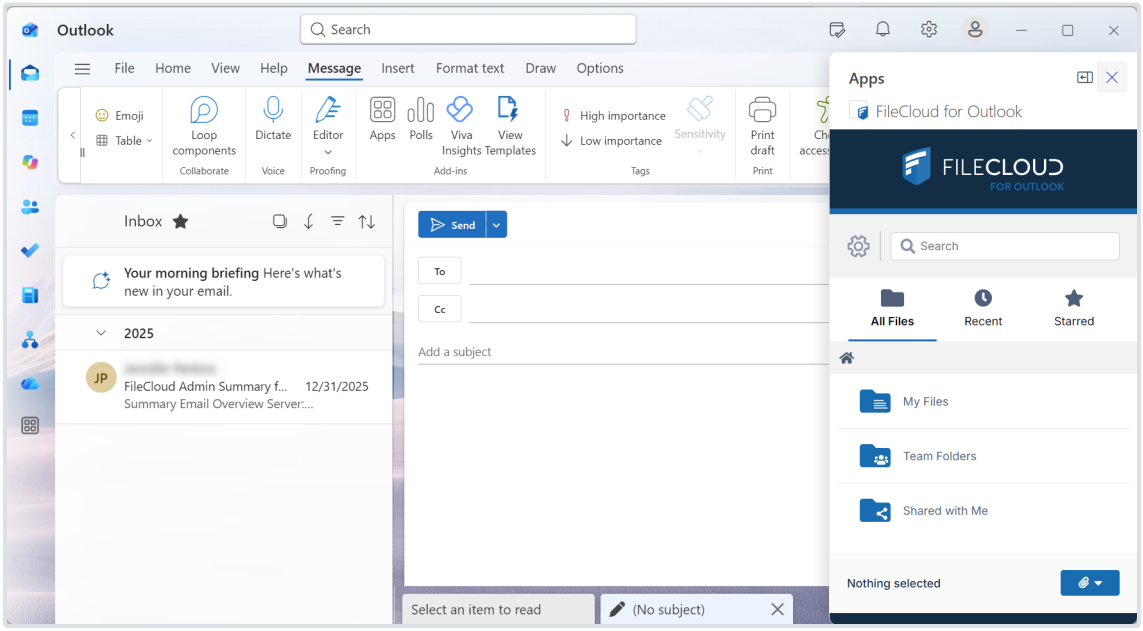
An empty email opens.

3. Click the Apps icon, which appears when **Message** is selected in the menu bar, and choose **FileCloud for Outlook**.



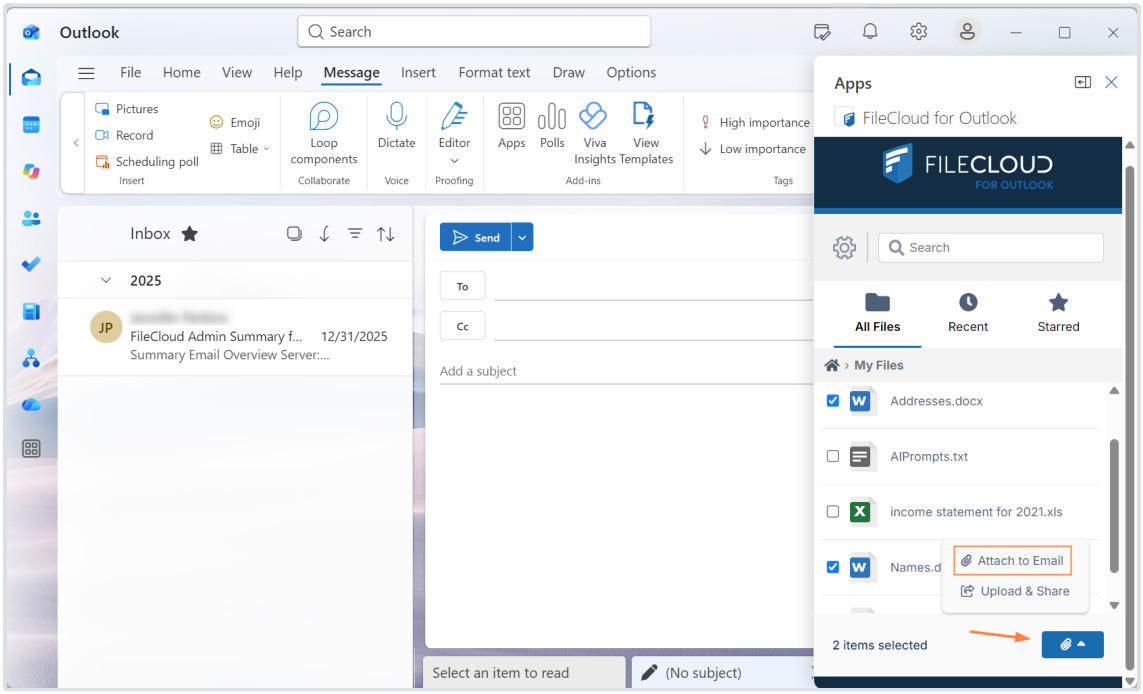
FileCloud for Outlook opens on the right of the screen.

4. If you are not already logged in to FileCloud, log in.
   All of your FileCloud folders appear in FileCloud for Outlook.

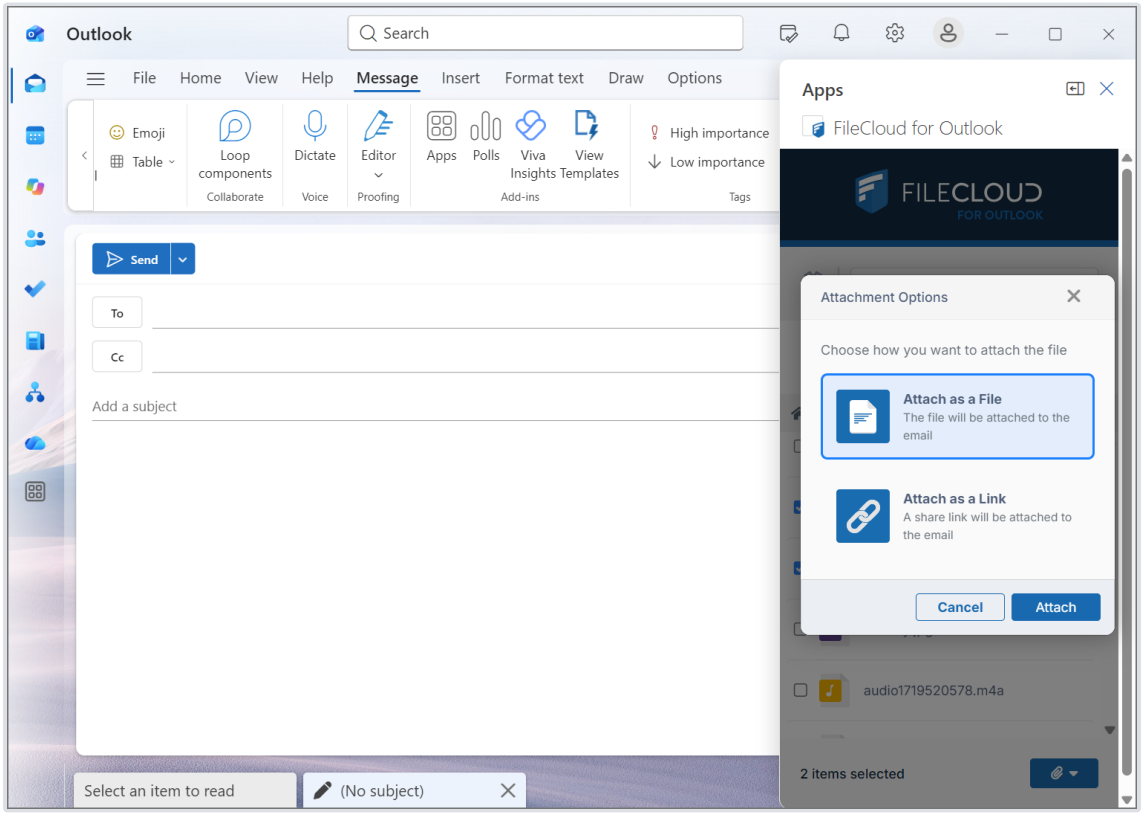


Attaching files and folders from FileCloud to an Outlook email

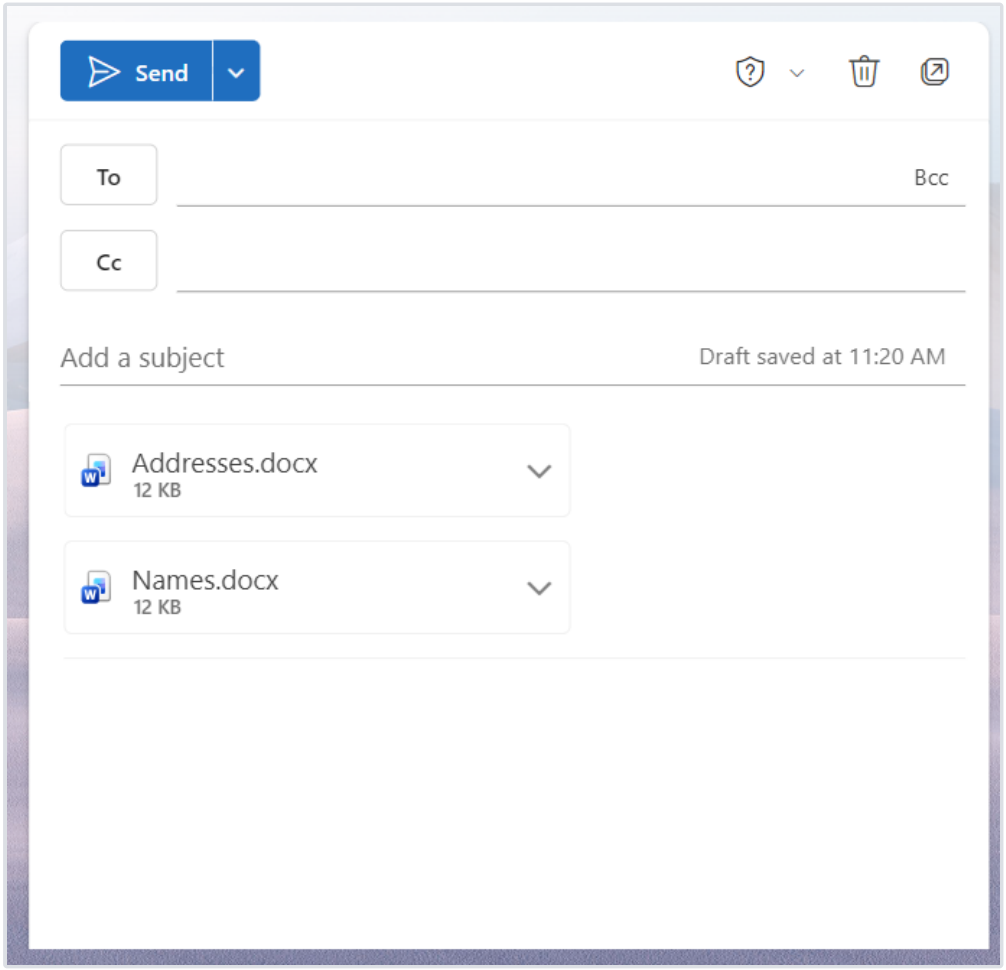
1. Begin composing a new email.
2. Open and log in to FileCloud for Outlook, then navigate to the file or files that you want to add to the email, and select them.
3. Click the attachment icon at the bottom of FileCloud Outlook and choose **Attach to Email**.



An **Attachment Options** dialog box opens.

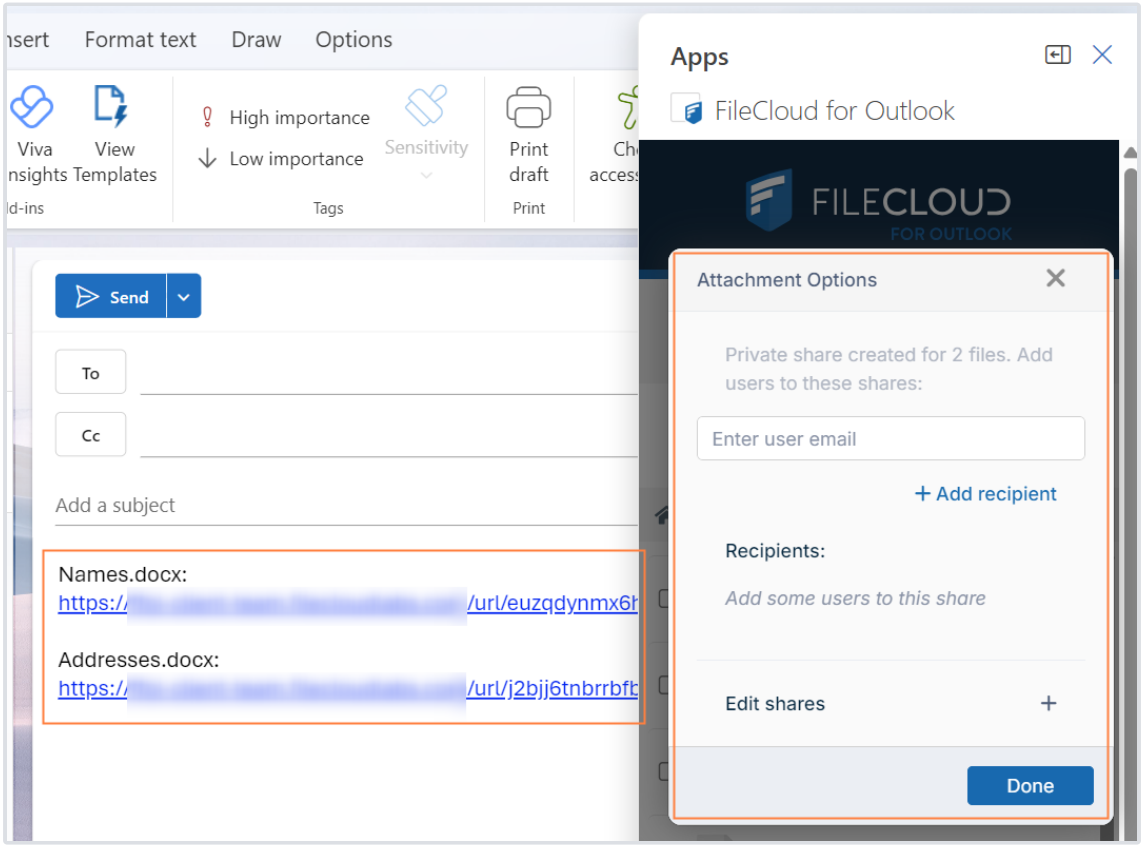


4. Choose **Attach as a File** or **Attach as a Link**, and click **Attach**.
   If you choose **Attach as a File**, the files appear as attachments in the email:



If you choose **Attach as a Link**, share links appear in the email. If the shares are private, recipients you add apply to both files.
The share link types are determined by your FileCloud system's default share setting. If the default share type is **Public**, you are not prompted to do anything else.

If the default share type in your system is private, **Attachment Options** open. The options enable you to add share recipients and modify share permissions and other share details.



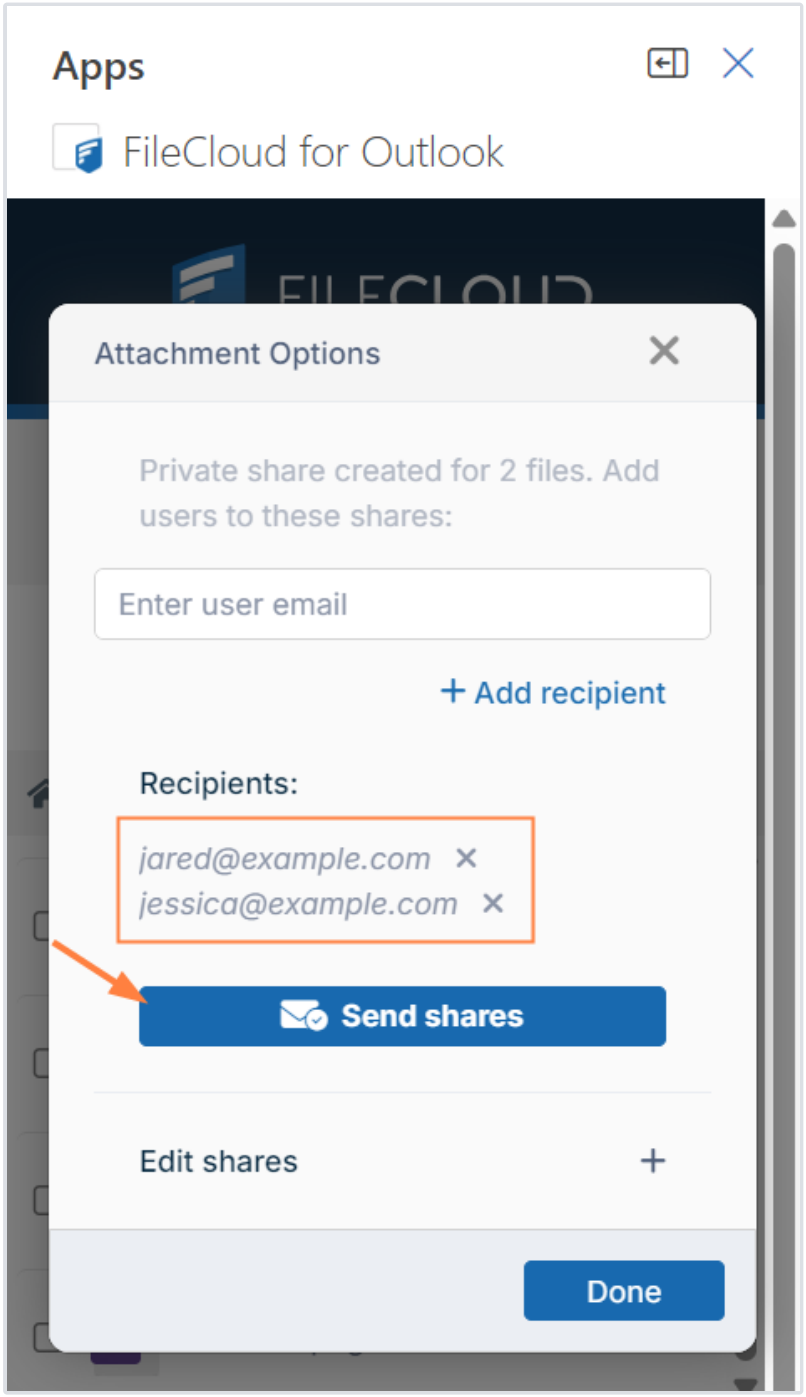
Note: Once you insert a share link, the share is created in FileCloud, even if you do not send the email or if you delete the link.

5. Continue with the next procedure, To add share recipients and modify permissions.

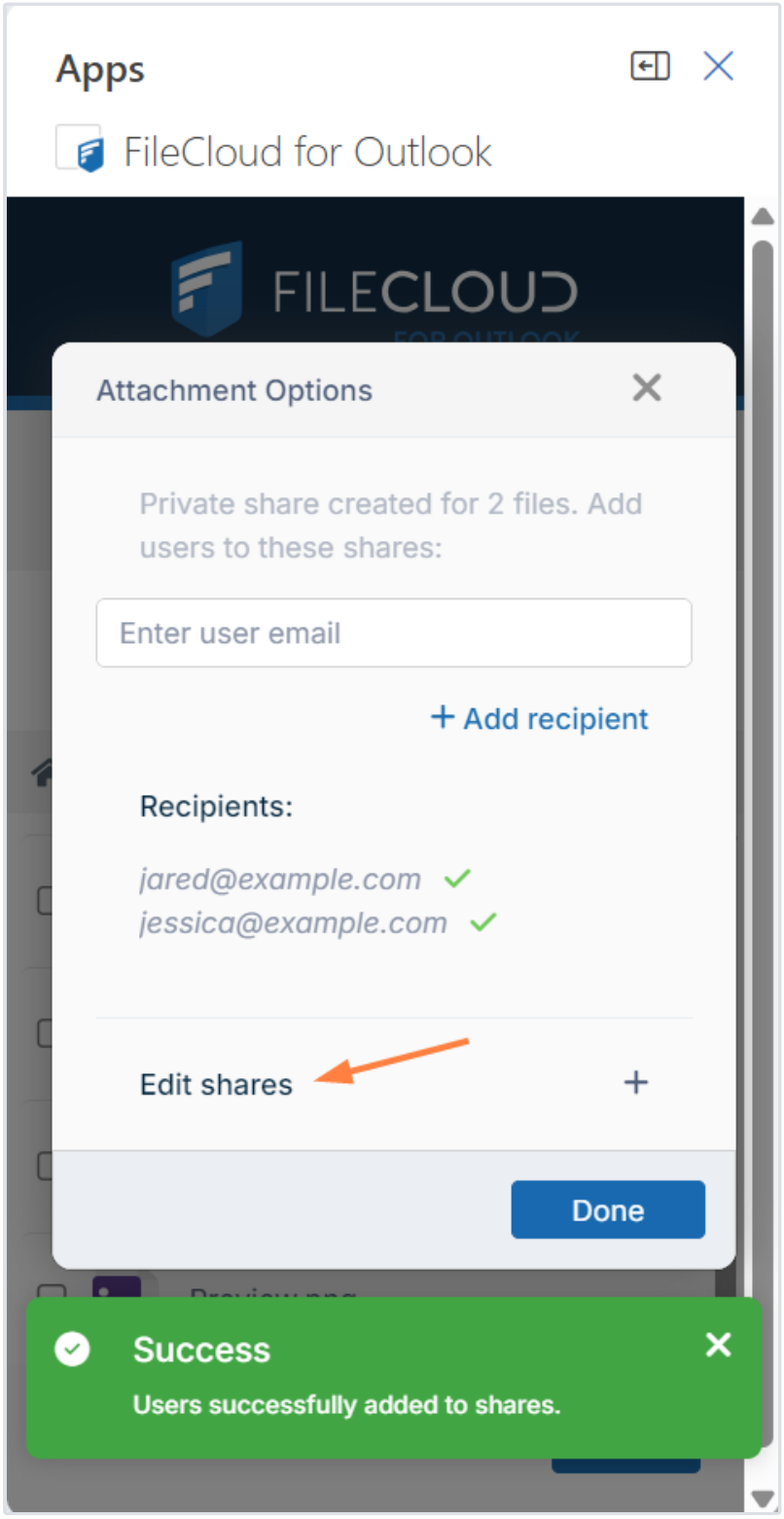
To add share recipients and modify permissions:

To use this feature, contact FileCloud Support to request a patch for FileCloud version 23.262.1. Alternatively, this functionality will be included in FileCloud version 23.263, expected to be released by the end of September 2026.

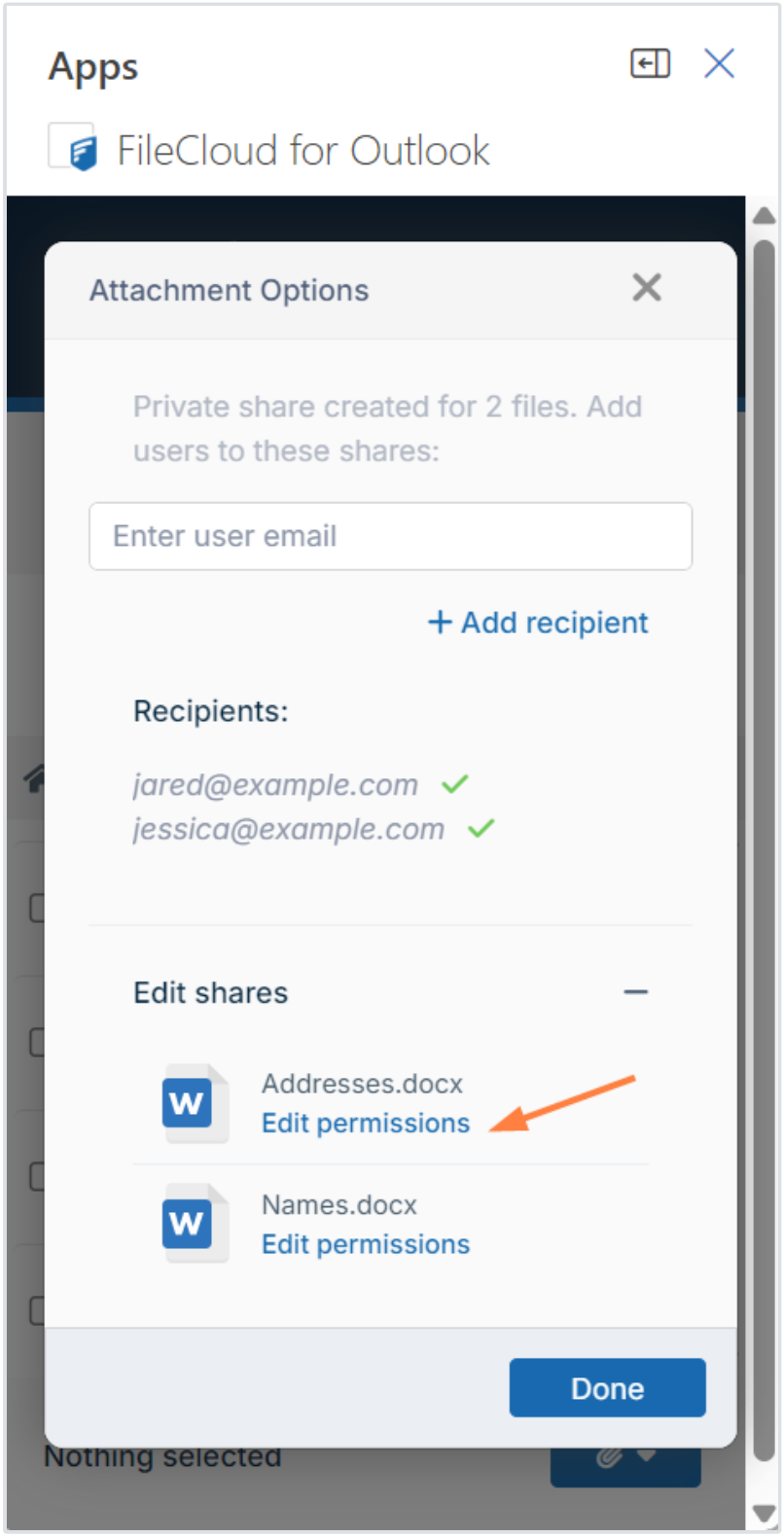
1. In **Enter user email**, add any number of emails.
   Note: You must add the email recipient if you want them to be able to access the share.
2. Click **Send shares** to add the users to the share.



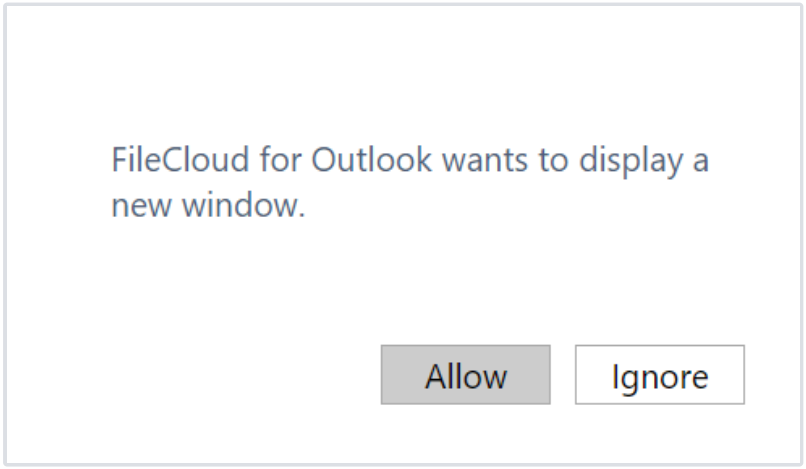
3. To modify permissions or other share details, click **Edit shares**.



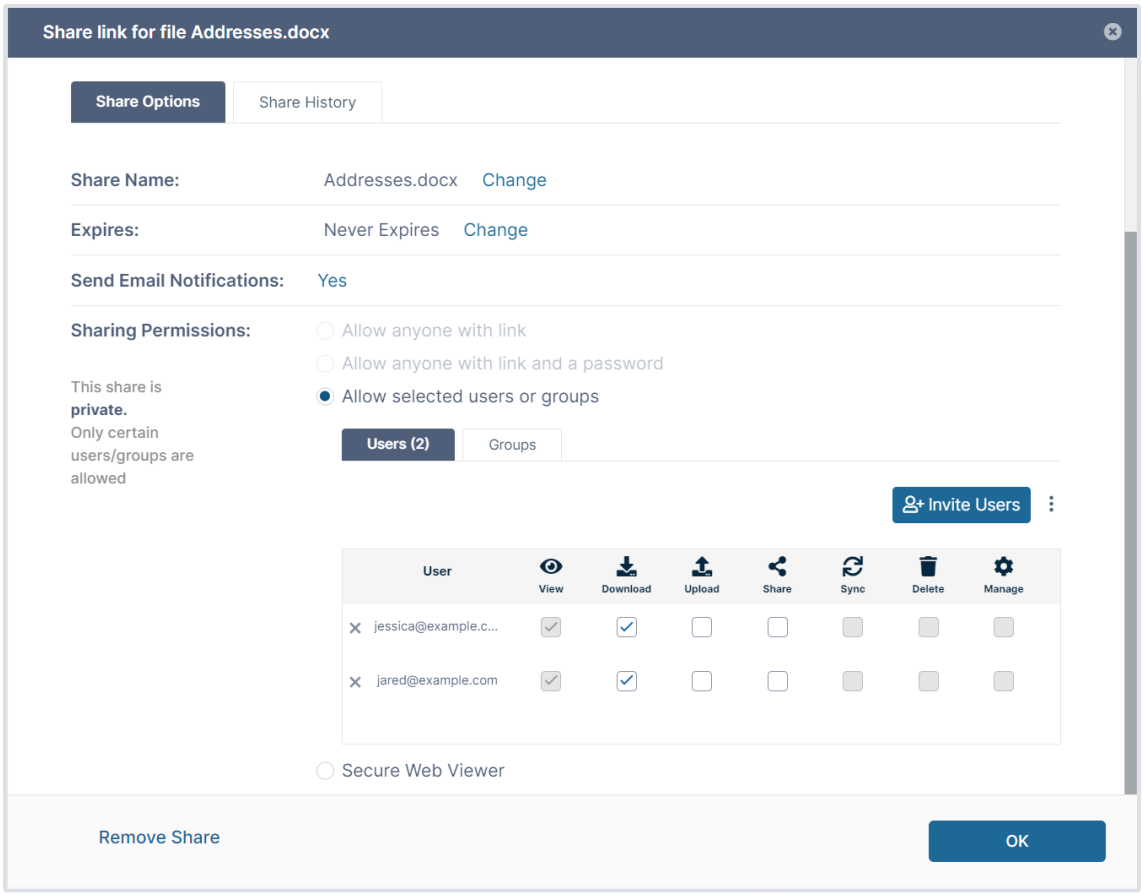
4. Under the file or folder name, click **Edit permissions**.
   Each file is listed with an **Edit permissions** link, so you can assign each user different permissions to each share.



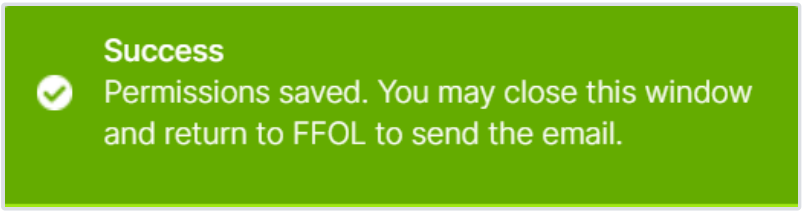
5. You are prompted to allow the system to display a new window:



6. Click **Allow**.
   A Share link window opens.
7. Modify users' share permissions or change any of the other share options that are available. See the help section Sharing Files and Folders for help configuring shares.



8. Click **OK**.
   A notification informs you that your changed permissions were saved, and that you can close the Share link window to return to FileCloud for Outlook.

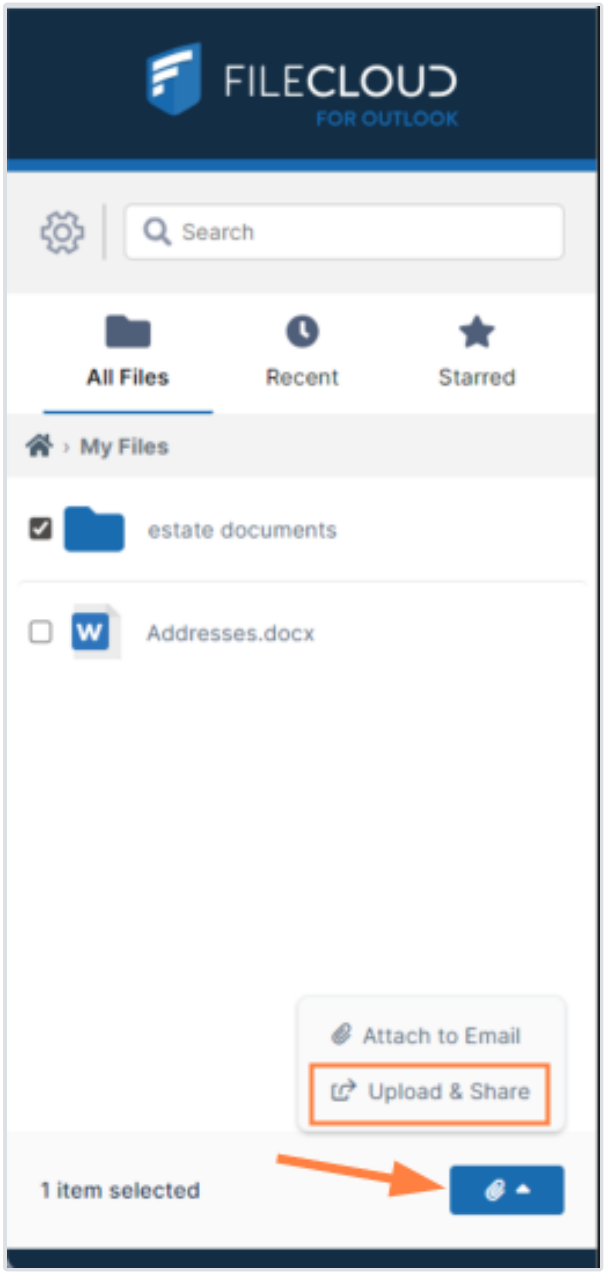


After you return to FileCloud for Outlook, you can edit permissions in any additional shares or send the email.

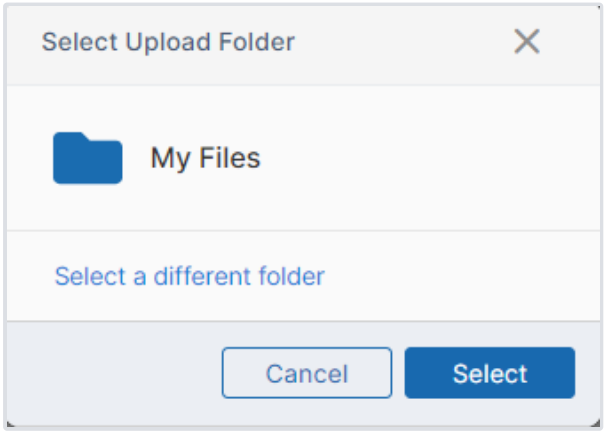
Upload a Local File to FileCloud and Share in an Email

When you are creating an email in FileCloud for Outlook, you can upload a local file to FileCloud, and once uploaded, it is automatically attached to the email as a share link.

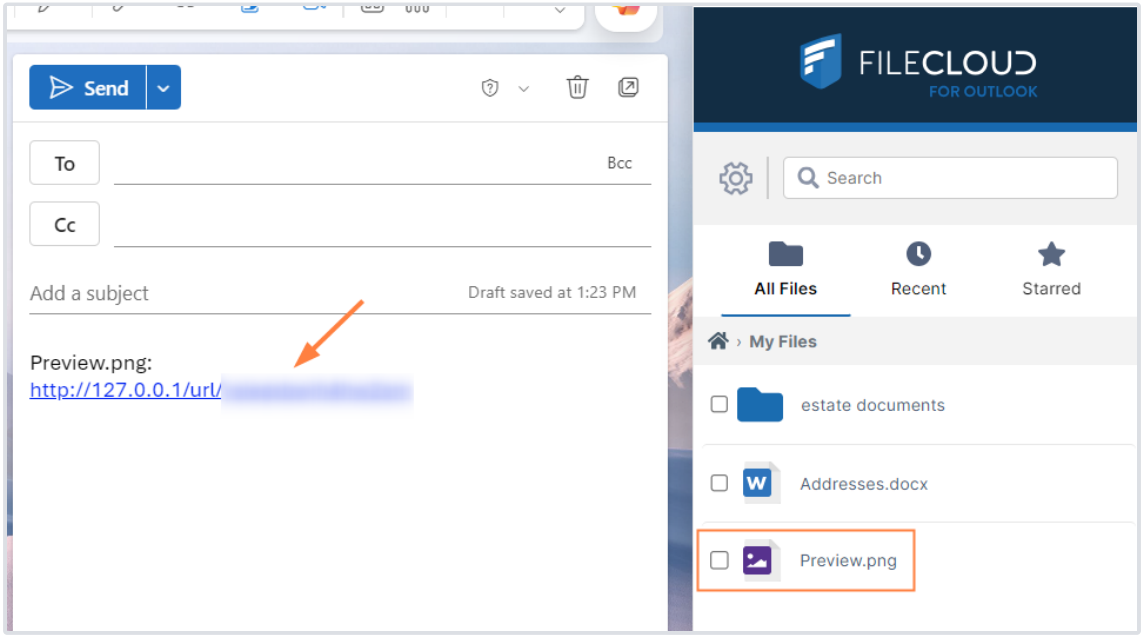
1. Begin composing a new email.
2. Open and log in to FileCloud for Outlook.
3. Click the attachment icon at the bottom of FileCloud for Outlook, and choose **Upload and Share**.



4. Select the local file that you want to upload and share.
5. You are prompted to choose a FileCloud folder:



6. Navigate to your destination folder, check it, and click **Select**.
The file is added to the folder and added as a link to your email.



The type of share link created is the default share type in your FileCloud system. If the default share type in your system is **Public**, you are not prompted to do anything else. If the default share type in your system is **Private**, you are required to add share recipients, and you may change share permissions and other details.

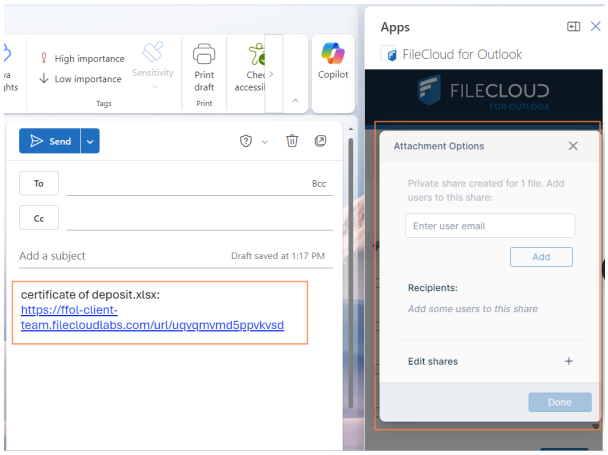
Note: Once you insert the share link, the share is created in FileCloud, even if you do not send the email or if you delete the link.

7. Now you can add share recipients and modify share permissions and other details using the procedure described above for Continue by following the procedure above under To add share recipients and modify permissions.

Attaching a large file or over 5 files to an email

The limit on the size of an email in Outlook is 20 MB. If including an attachment would cause the email to be greater than 20 MB, FileCloud for Outlook attaches it as a share link instead, and it is added as a share in FileCloud.

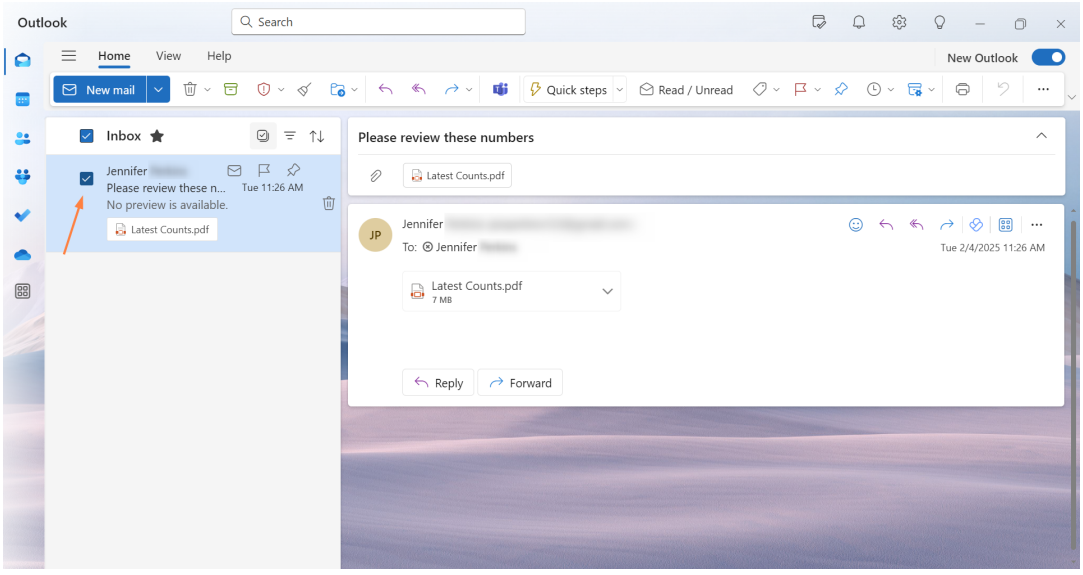
The same applies if you attempt to attach over 5 files to the same email; FileCloud for Outlook attaches the files as share links instead, and they are added as shares in FileCloud



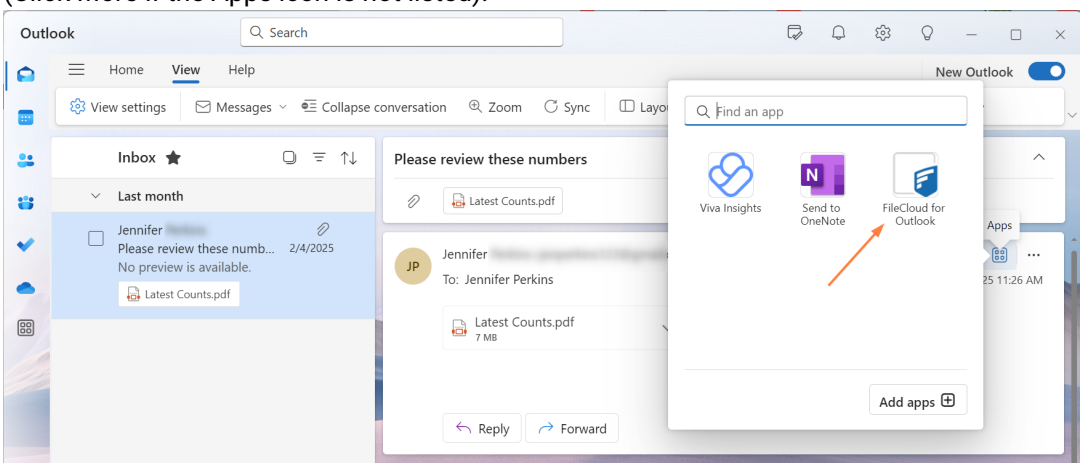
As with other shares added to emails, the share is the default type in your system. If the default share type is private, you are prompted to add recipients. See To add share recipients and modify permissions, above.

Uploading an Outlook attachment to FileCloud

1. a. In the navigation panel click **Inbox** or **Sent Items**, and then open an email.

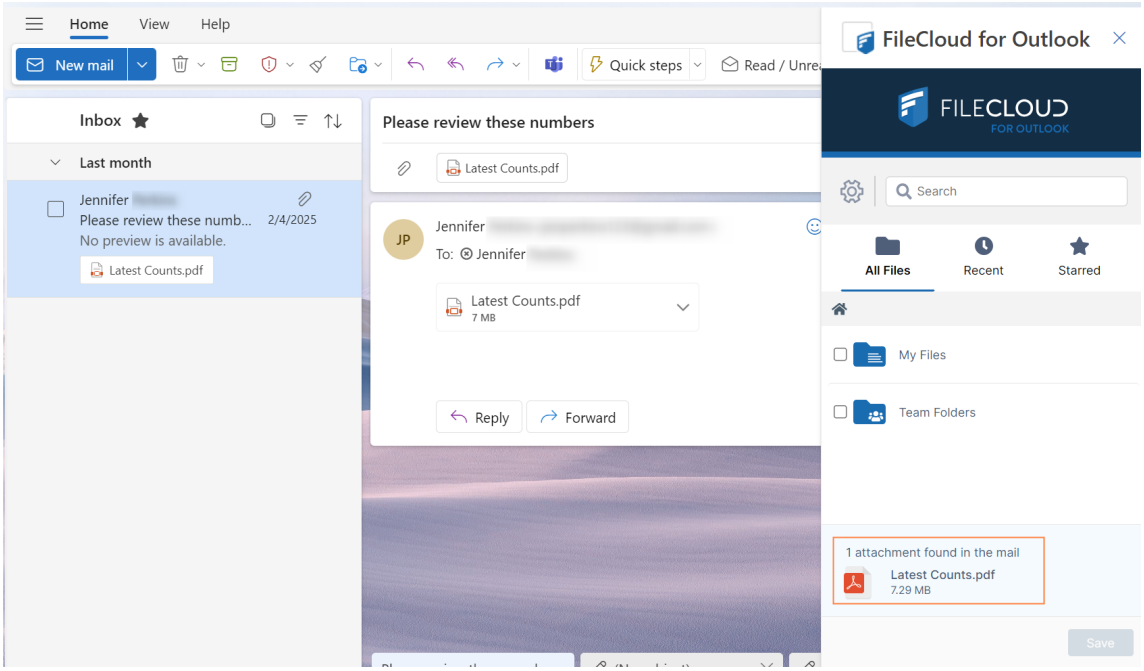


b. In the upper-right corner of the email, click the Apps icon, and choose FileCloud Outlook. (Click More if the Apps icon is not listed).

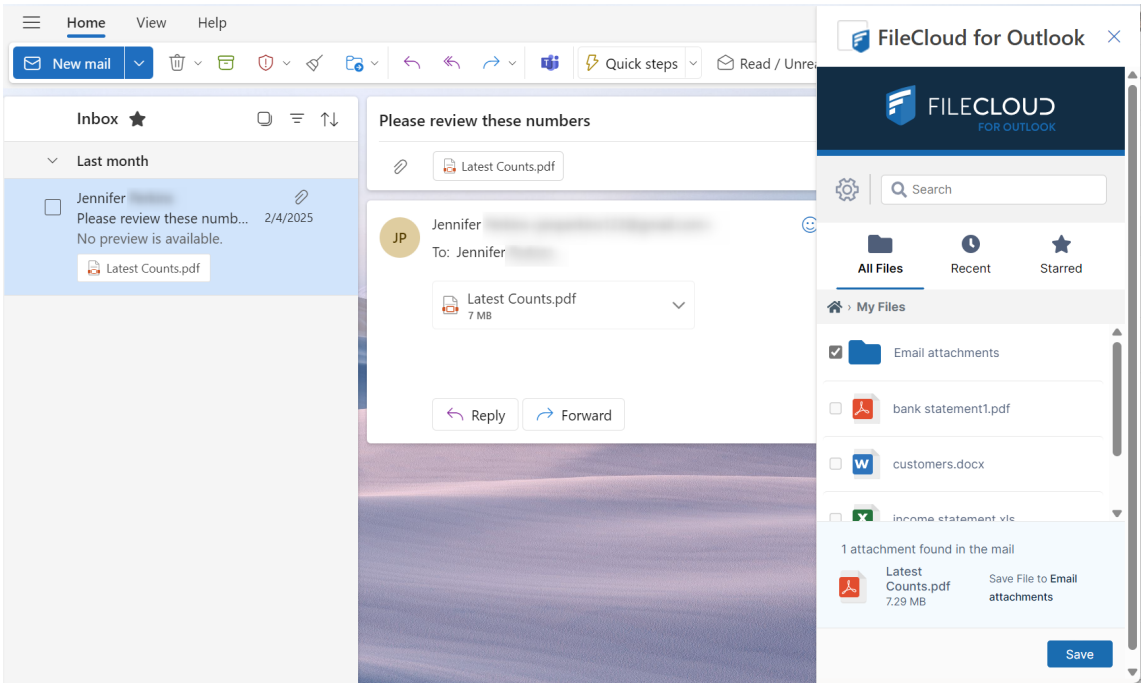


FileCloud for Outlook opens as a panel to the right of the email.

2. If you are not already logged in to FileCloud, log in.
   By default, the email's attachments are listed at the bottom of the screen, and the **Save** button is not yet available.
   (You can also configure custom upload settings. See Automatically uploading an email attachment to FileCloud, below.)



3. Navigate to and check the FileCloud folder you want to store the file in.



4. Click **Save**.
   The file is now stored in FileCloud.

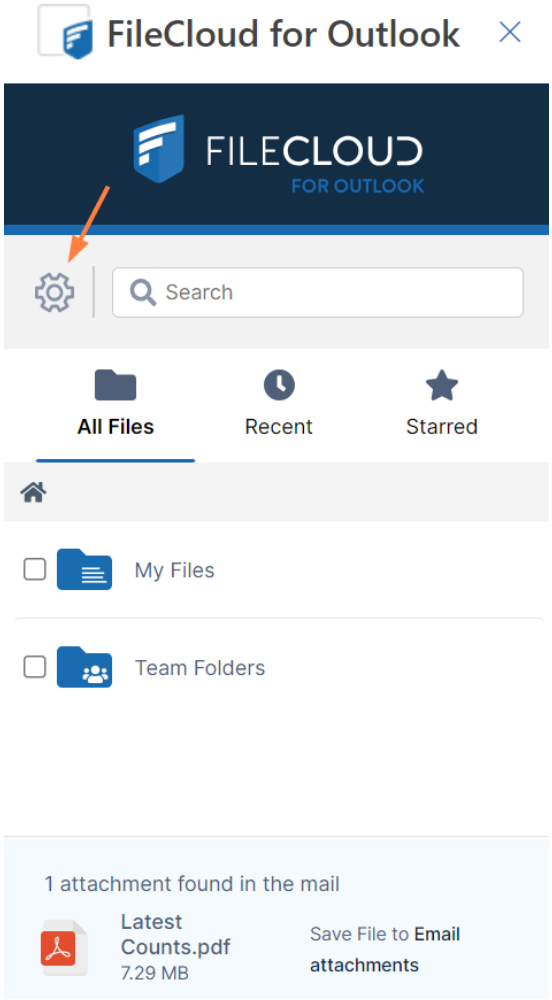
Automating attachment upload

You can specify a default FileCloud folder where Outlook attachments are saved.

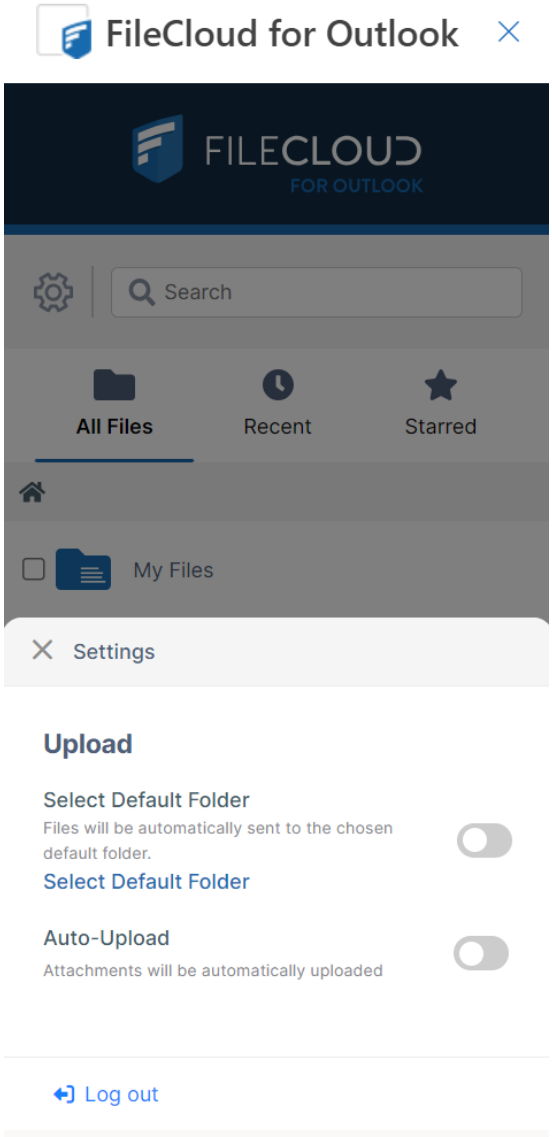
You can also automatically save attachments to that folder.

To enter upload settings:

1. After you open FileCloud for Outlook in an email, click the cog icon next to the search bar.



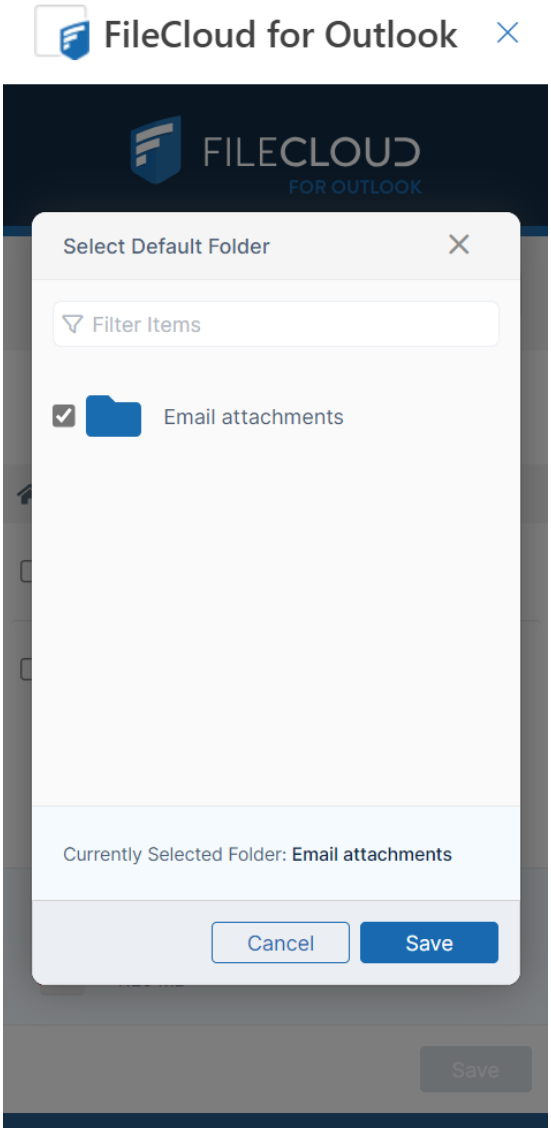
Upload settings appear.



To set up a default upload folder:

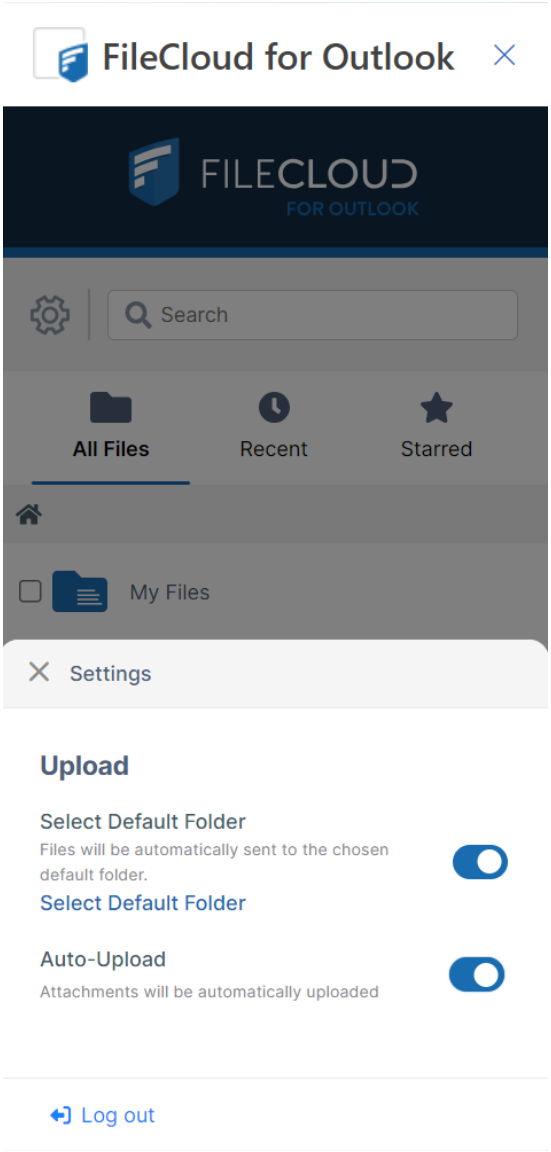
a. Click **Select Default Folder**.
   Your FileCloud folders appear.

b. Navigate to a folder and select it.

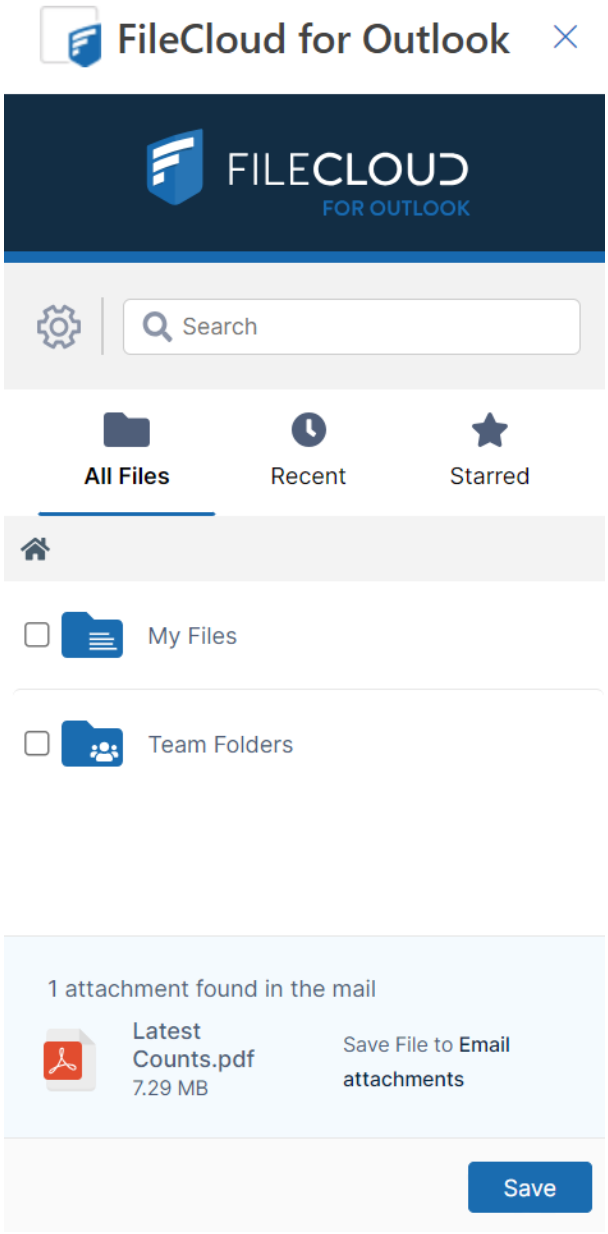


c. Click **Save**.

d. If you want email attachments to be automatically saved to your default folder when you open an email, enable **Auto-Upload**.
Note: The file is automatically saved only when the email is open and FileCloud for Outlook is opened beside it.

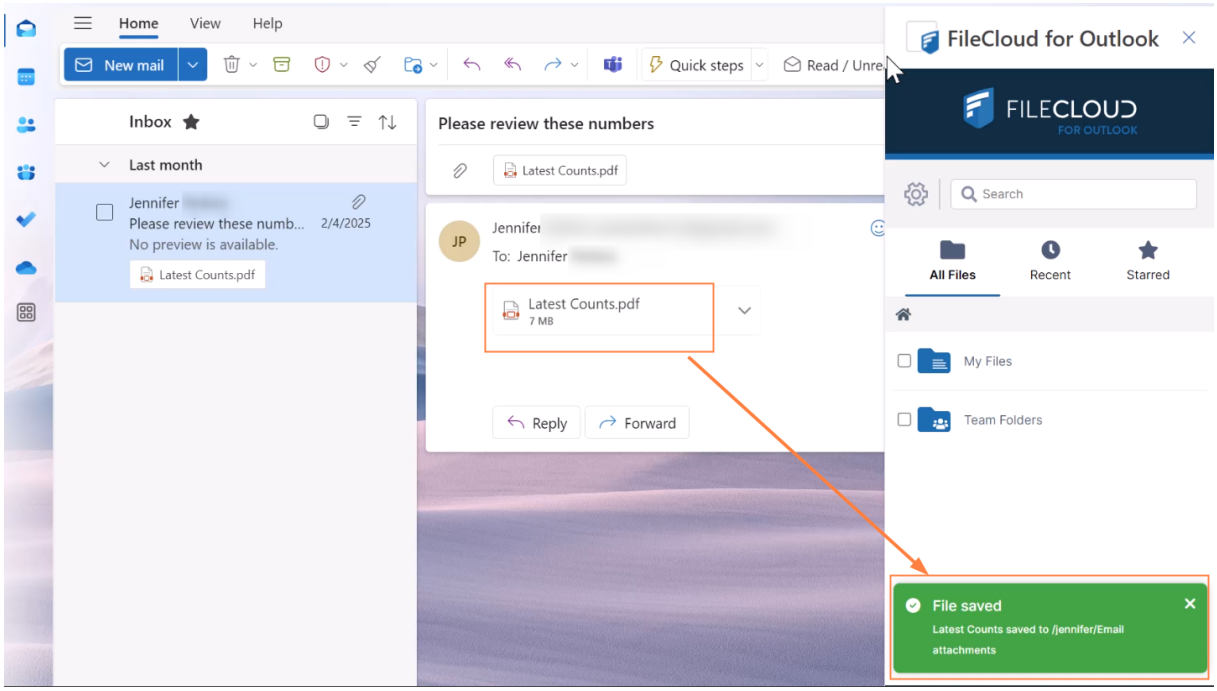


When FileCloud for Outlook is opened, if you have set up a default folder, but you have not set up auto-upload, the FileCloud dashboard gives you the option of saving to the default folder without requiring you to navigate to it:



You can click **Save** to save to the default folder or navigate to another folder and select it, and then click **Save**.

When FileCloud for Outlook is opened, if you have set up auto-upload, the FileCloud dashboard uploads the email attachment to FileCloud when you open it.



Restrictions on file types and file extensions in FileCloud

Please note the following restrictions when uploading files to FileCloud:

- Files with the same name:
  - If you upload a file with the same name and the same case as another file in the same folder, it overwrites the file.
  - If you upload a file with the same name but a different case than another file in the same folder, you cannot upload the file and the File Operations window displays a file name conflict message.
  - If you upload files with the same name but different file extensions, like **myfile.doc** and **myfile.docx**, they are treated as different files.
- FileCloud cannot upload files with leading spaces in the filename.
- By default, files with the extensions **php**, **php5**, **phar**, and **phtml** cannot be uploaded into FileCloud.

For Admins

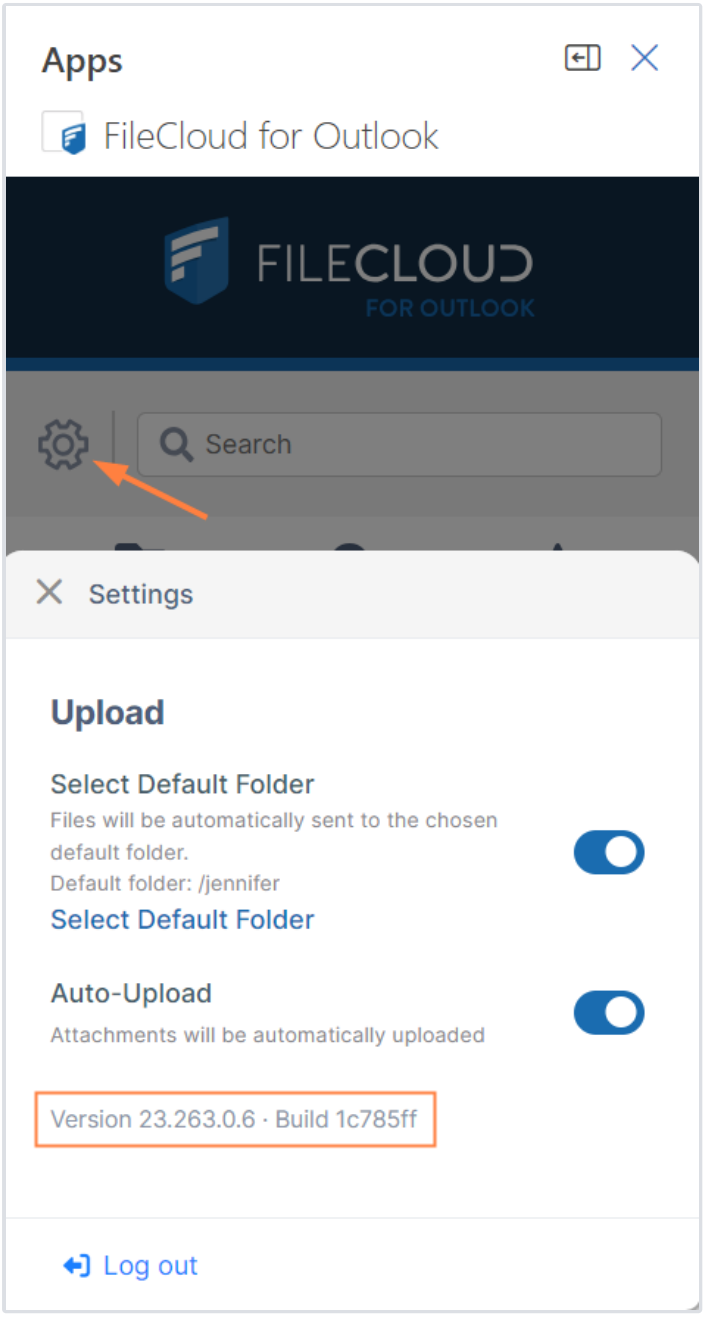
- To specify which file extensions may be uploaded into FileCloud, see Managing File Extensions and Restricting File Extensions.

- To restrict certain filenames from being uploaded into FileCloud, see Restricting File Names.

Viewing the FileCloud for Outlook version and build

To view the FileCloud for Outlook version and build, click the cog icon to open the Settings window.

The Outlook version and build are listed below the other settings:



Troubleshooting

I am not able to see FileCloud for Outlook inside Outlook.

Outlook may disable an add-in if startup performance is affected. In Outlook, go to **File** > **Options** > **Add-Ins**. Find the FileCloud for Outlook add-in from the disabled add-ins list and enable the add-in. You can set Outlook to always enable FileCloud Outlook add-in so that it does not get disabled.

Installing the Outlook Add-In

Installing the add-in

For FileCloud admins

Central deployment
As an admin, you can deploy the add-in centrally using the Microsoft 365 Apps admin center. This enables you to control who has access to it, and to remove or add access at any time. In addition it enables you to automatically insert the add-in into the users' Outlook ribbon, eliminating the requirement that they install it themselves.

To deploy the add-in centrally, see the Microsoft 365 Apps admin center.

User download
The add-in is also available from the Microsoft Office store for individual users. You can allow users to install the add-in from there, but you are not able to manage it centrally if they download it this way. User steps for installing the add-in are listed below under **For FileCloud for Outlook users**.

For SSO login

To be able to log in with SSO, users must also have the Auth Agent application running on the client they are using to access Outlook.
To install and run the SSO Auth Agent, see Install and Run the SSO Auth Agent .

For FileCloud for Outlook users

Check with your admin whether FileCloud for Outlook is available to you already when you click the



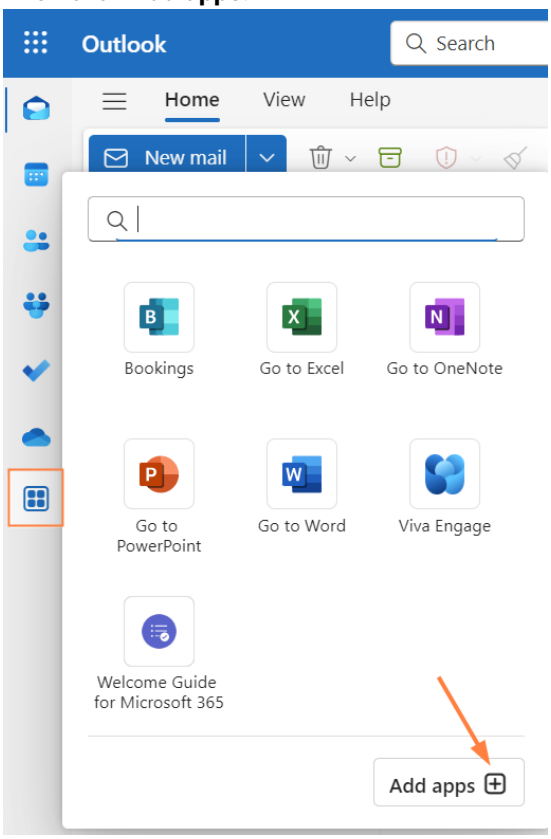
Apps icon in Outlook, or if you need to add it yourself.

Installation for users with a Microsoft 365 account

If you have a Microsoft 365 account, you can install the FileCloud for Outlook add-in from the Microsoft Apps store.

To install the add-in from the Microsoft Apps store:

1. Open Outlook, and click the Apps icon.
2. Then click **Add apps**.



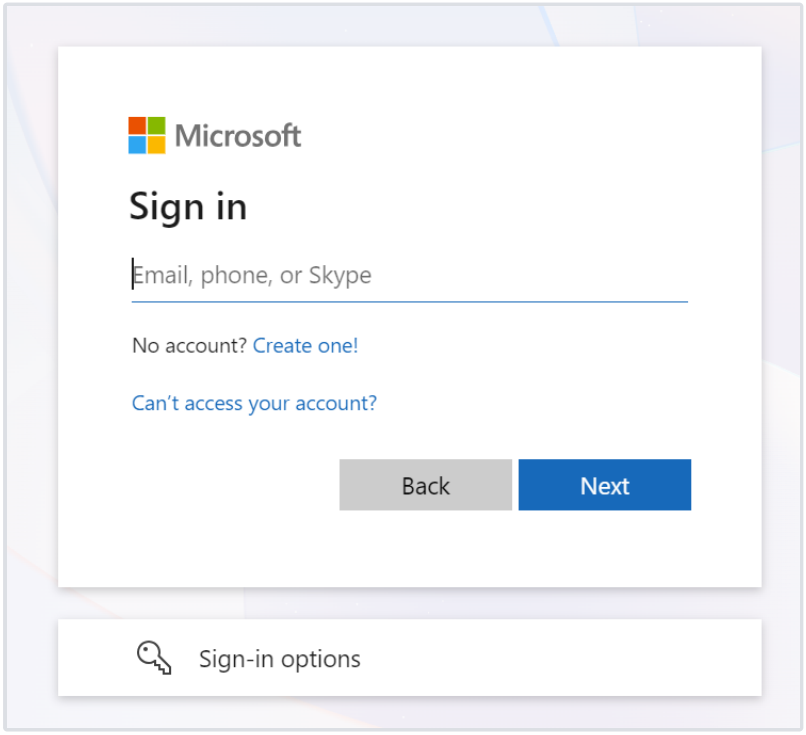
3. In the window that opens, enter **FileCloud for Outlook** in the search bar.
4. In the window that opens, click **Add**, and then click **Open**.
   The **FileCloud for Outlook** app is now added to Outlook.
5. To log in to FileCloud for Outlook with SSO, you must also download the FileCloud Helper service and run it on the client where you are running the add-in.
   To install and run the SSO Auth Agent, see Install and Run the SSO Auth Agent .

Installation for users who do not have a Microsoft 365 account

If you would like to install FileCloud for Outlook, but do not have access to a Microsoft 365 account, you can install it using a manifest file that FileCloud can provide to you.

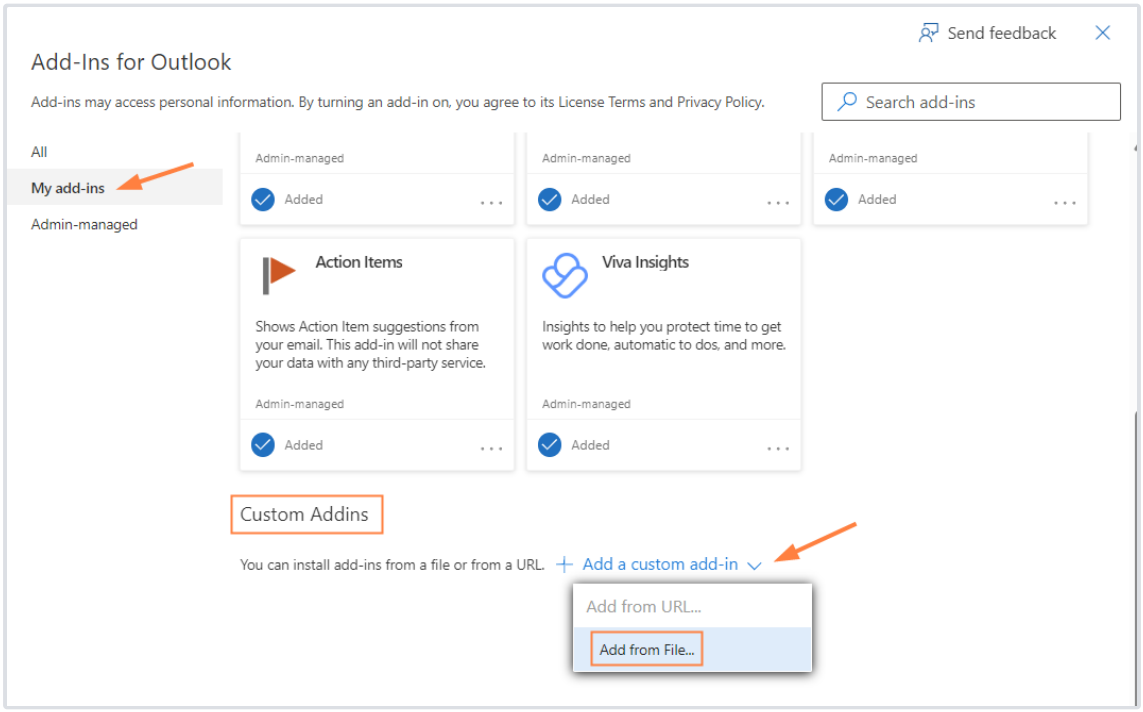
To install FileCloud for Outlook with the manifest file:

1. Ask your admin to send you the **ffol-manifest.xml** file provided by FileCloud.
   Admins: Request **ffol-manifest.xml** from FileCloud Support.
2. Go to https://aka.ms/olksideload.
   A Microsoft **Sign in** window opens.
3. Sign in using a Microsoft account.

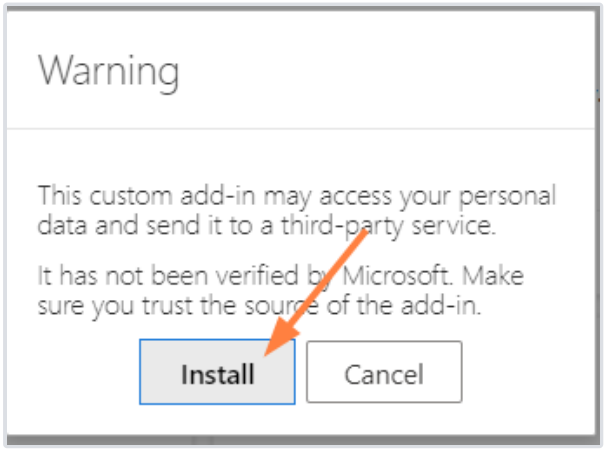


The **Add-Ins for Outlook** window opens.

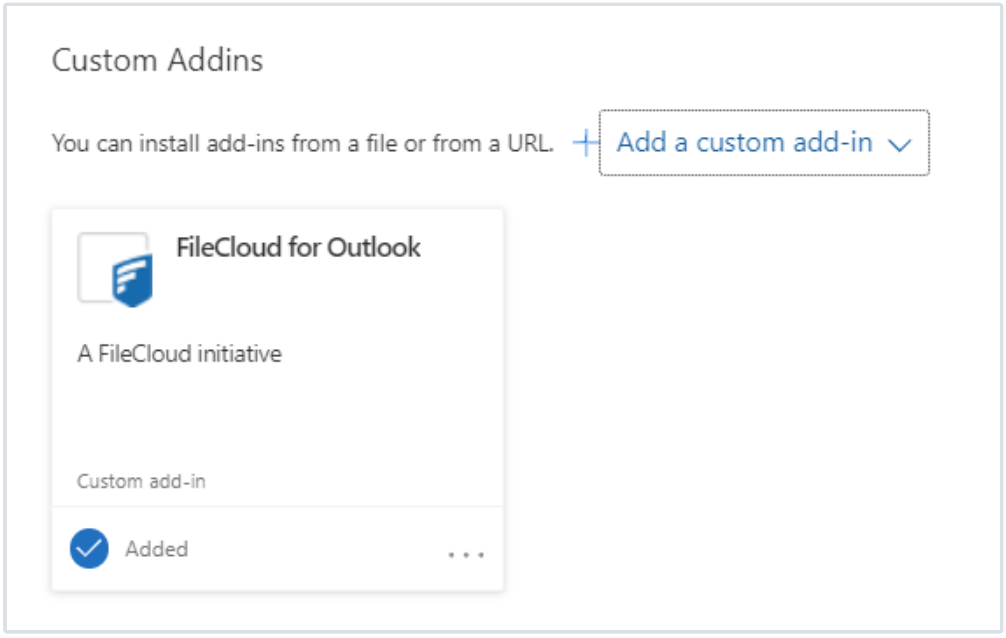
4. In the navigation panel, click **My add-ins**.
5. Scroll down to **Custom Addins**, and click **Add a custom add-in**, then choose **Add from File...**



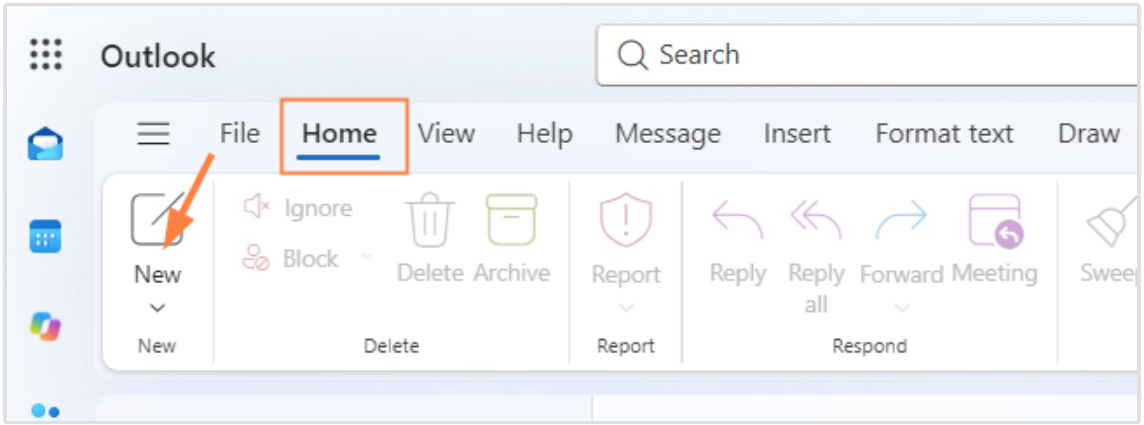
6. Choose the **ffol-manifest.xml** file that you have been provided with.
7. At the prompt, click **Install**.



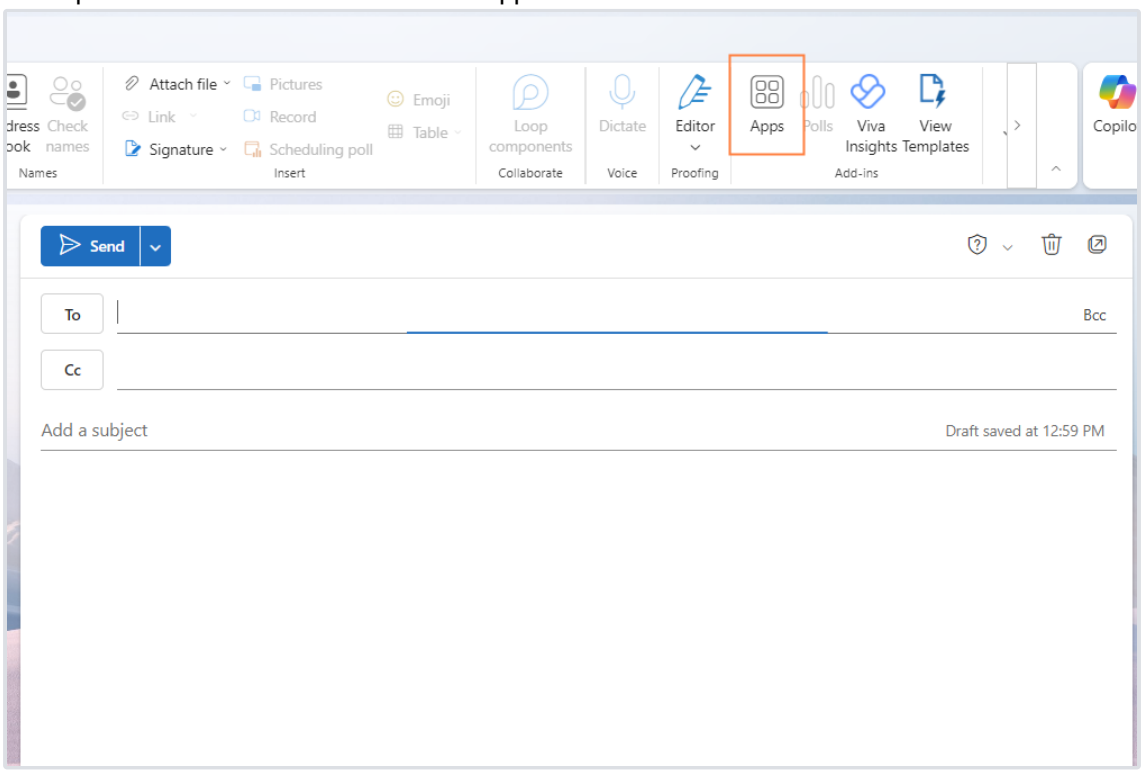
The FileCloud for Outlook add-in is installed:



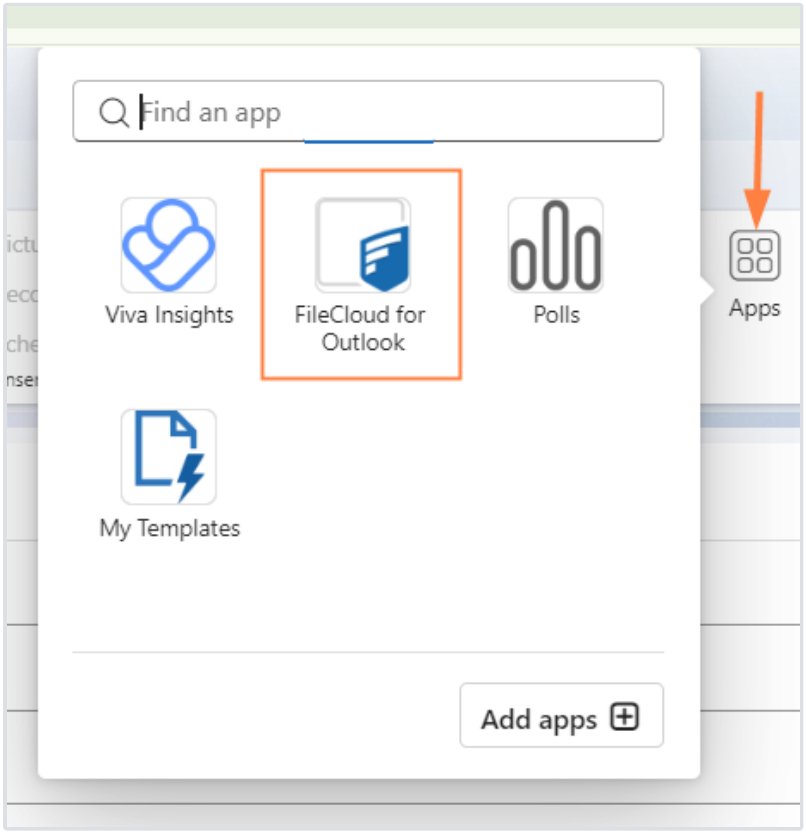
8. Close the **Add-ins for Outlook** window.
9. Refresh the Outlook screen.
10. Go to a view where the Apps icon is supported. For example, go to **Home** and click **New**:



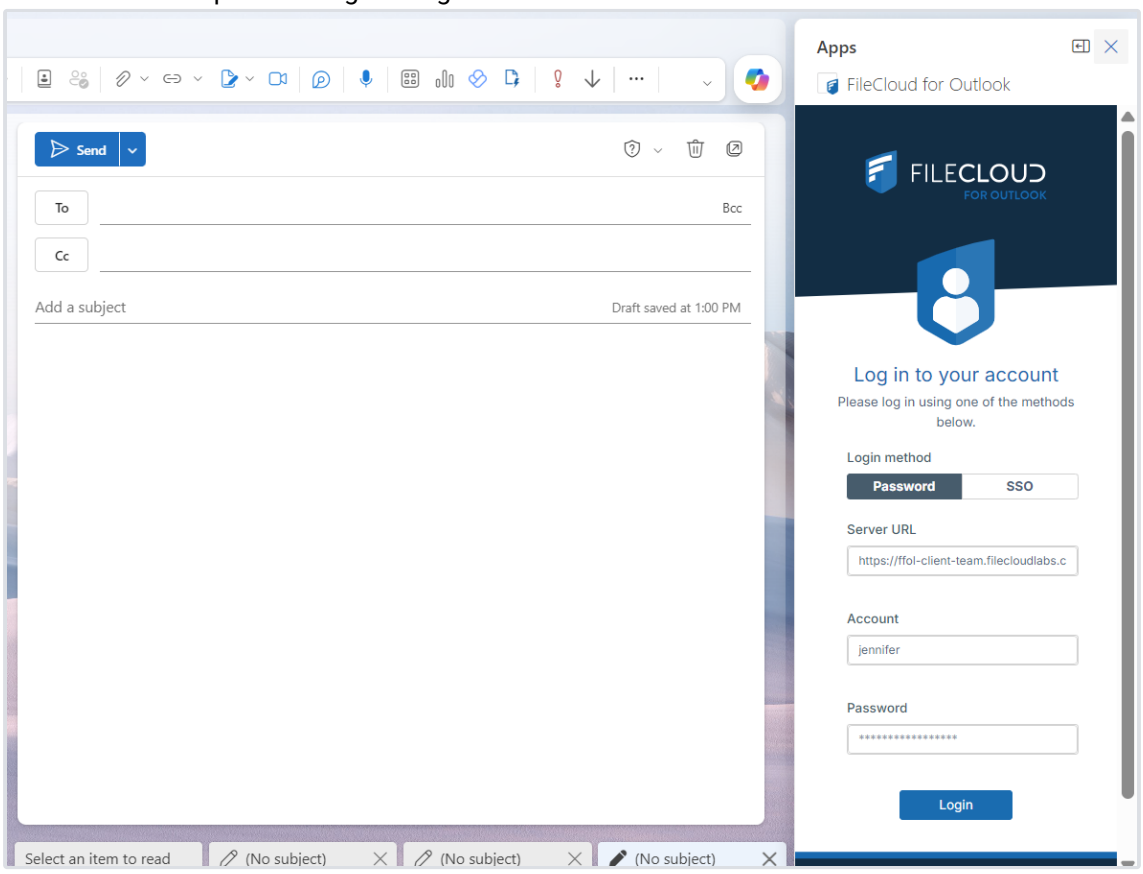
This opens a new email and enables the Apps icon:



11. Click the Apps icon, and confirm that FileCloud for Outlook appears:



12. Click the icon to open and begin using FileCloud for Outlook.

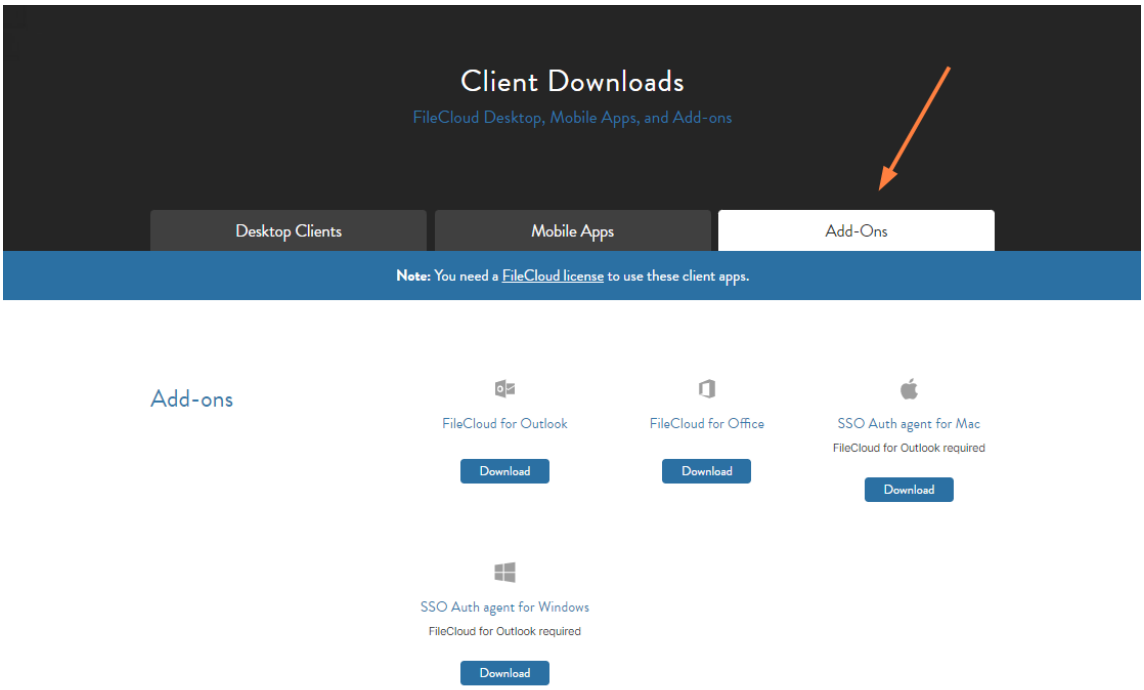


Install and Run the SSO Auth Agent

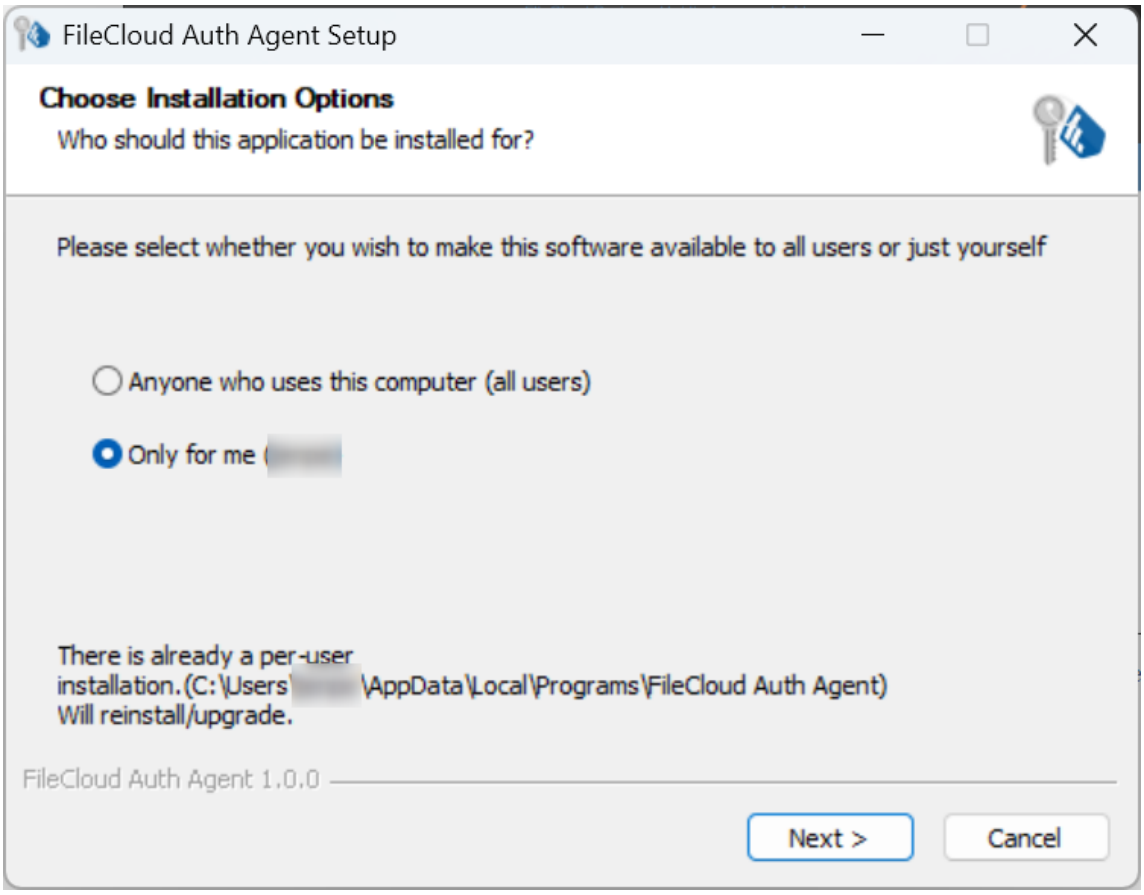
To log in to the FileCloud for Outlook Add-in for FileCloud with SSO, you must have the SSO Auth Agent running on the client.

> You may use the following procedure to update the SSO Auth Agent as well as to install it. It is recommended that you uninstall the previously installed SSO Auth Agent before installing the new one.

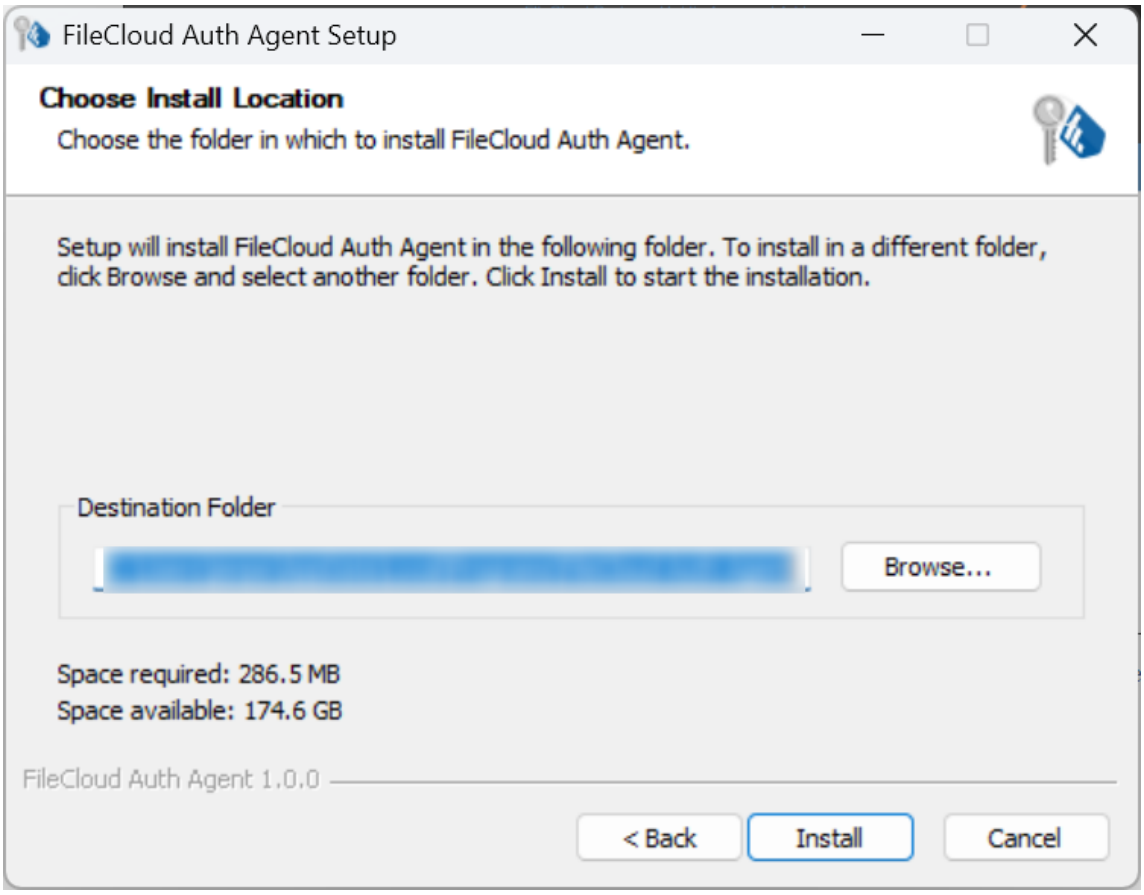
1. On the device that you'll be using the FileCloud for Outlook Add-in for FileCloud, go to https://www.filecloud.com/additional-downloads/ and click the Add-ons tab:



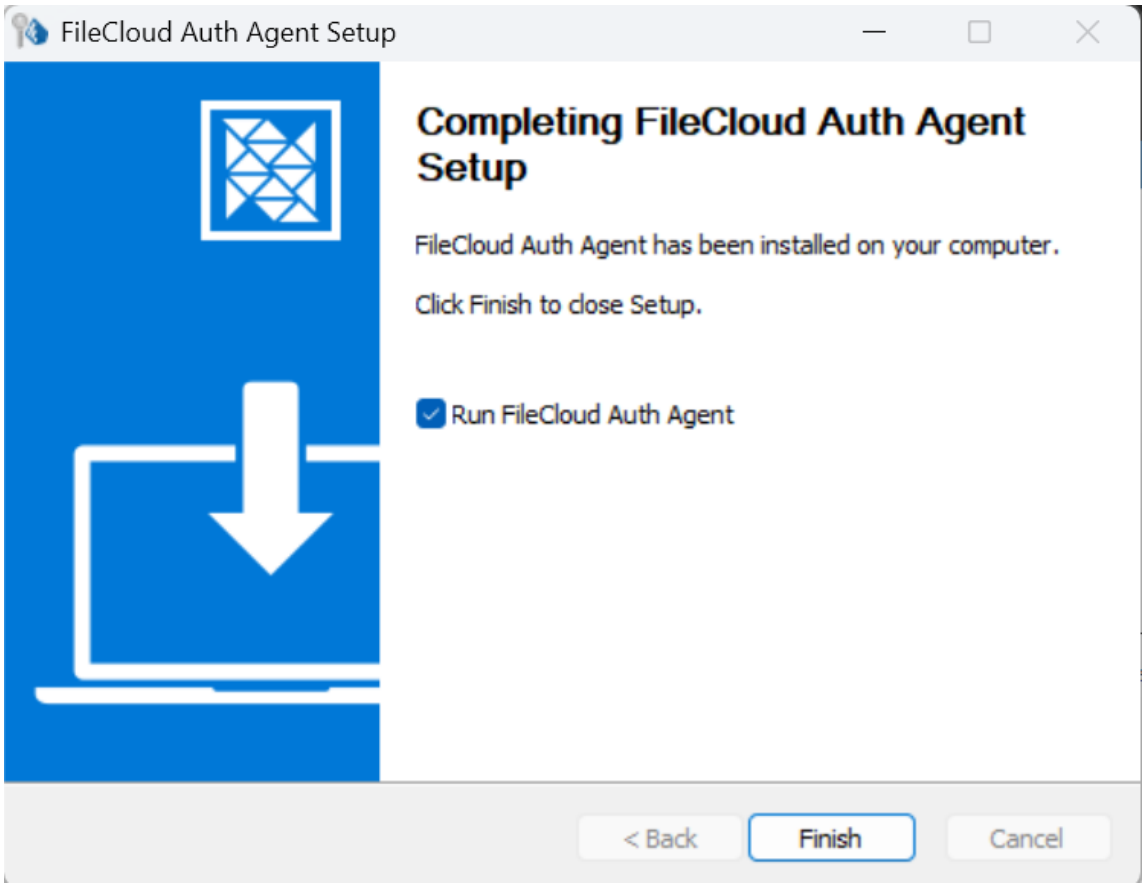
2. Click the **Download** button for **SSO Auth agent for Mac** or **SSO Auth agent for Windows** depending on your system.
   The download is installed on your client.
3. Locate the Auth Agent installer exec in your downloads and open it.
   The installation wizard opens:



4. Choose **Anyone who uses this computer** or **Only for me**, and click **Next**.



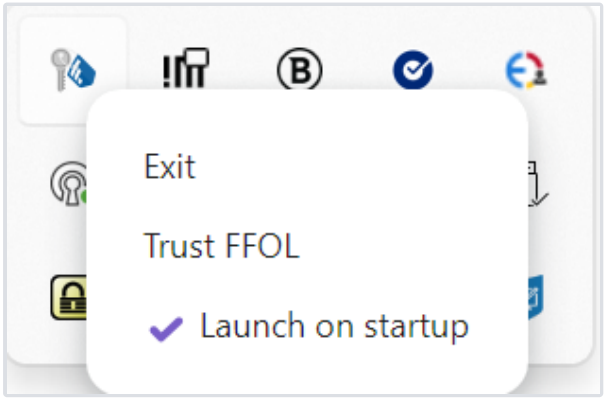
5. You may change the **Destination Folder**.
6. Click **Install**.
   When installation is complete, the wizard displays the screen:



7. Leave **Run FileCloud Auth Agent** checked, and click **Finish**.
8. If you are prompted to install certificates, accept the prompts. Icons appear on your screen and in your tray to indicate that the Auth Agent is running:



9. A few functions are accessible from the FileCloud for SSO icon in the Windows system tray or the macOS menu bar:



- To stop running the Auth Agent, click **Exit**.
  If the Auth Agent is stopped, you cannot use FileCloud for Outlook.
- If you accidentally reject installation of certificates, install them by choosing **Trust FFOL**.
- To enable automatic launching of the Auth Agent on startup, click **Launch on startup** so that a check appears in front of it.

Using FileCloud for Outlook with an On-Premises Exchange Server

FileCloud for Outlook can be installed for use with an on-premises Microsoft Exchange Server using the installation instructions on this page.

Currently supported features in Exchange Online vs. On-Premises Exchange

Note that currently, certain features available when using FileCloud for Outlook with Exchange Online are not available when using it with the on-premises Exchange Server as shown in the table below.

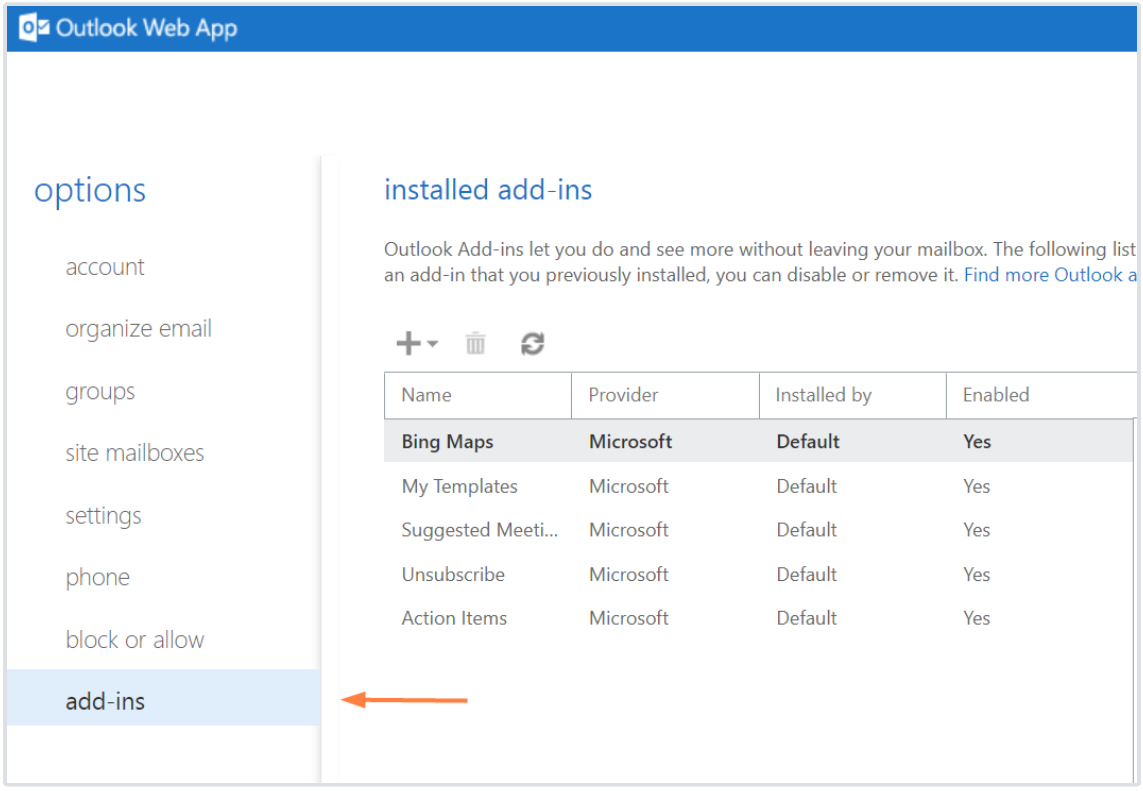
Specifically, on-premises Exchange Server currently supports Mailbox requirement set 1.5 or earlier, which does not support these features. In the future, if on-premises Exchange Server supports requirement set 1.8 or higher these features will become available.

Feature	Exchange Online	On-Premises Exchange	Notes
Save attachments to FileCloud	✅ Available	❌ Unavailable	Footer displays "Saving attachments is not supported in this version of Outlook." in place of the folder controls, Save button, and Edit Attachment List button.
Automatic upload of attachments	✅ Available	❌ Unavailable	Does not run, even with a default folder set and Auto-Upload enabled.

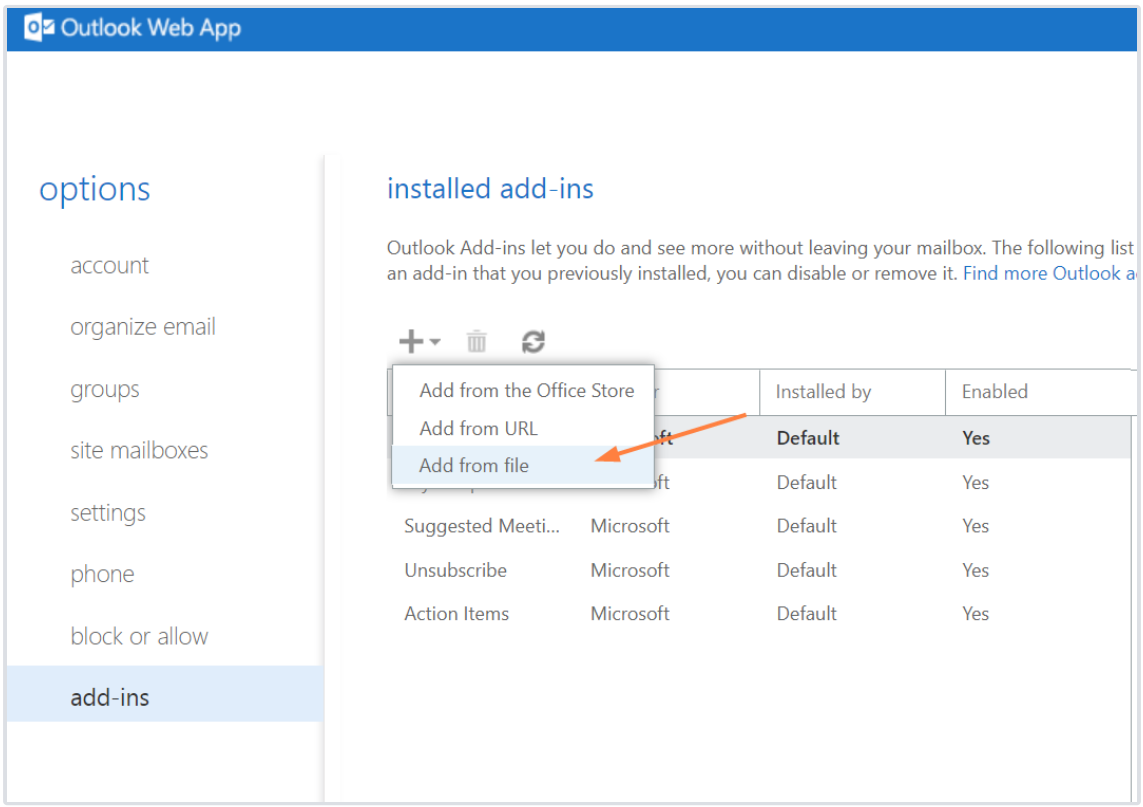
Feature	Exchange Online	On-Premises Exchange	Notes
Attach a file from FileCloud to an email	✅ Attaches as a real file	⚠️ Attaches as a link	On-premises skips the file/link chooser and shows: "This version of Outlook does not support attaching files. Files will be attached as links instead."
Upload & Share	✅ Available	✅ Available	No difference.
Browsing, search, Recent, Starred, settings	✅ Available	✅ Available	No difference.

To install FileCloud for Outlook for use with an on-premises Exchange Server:

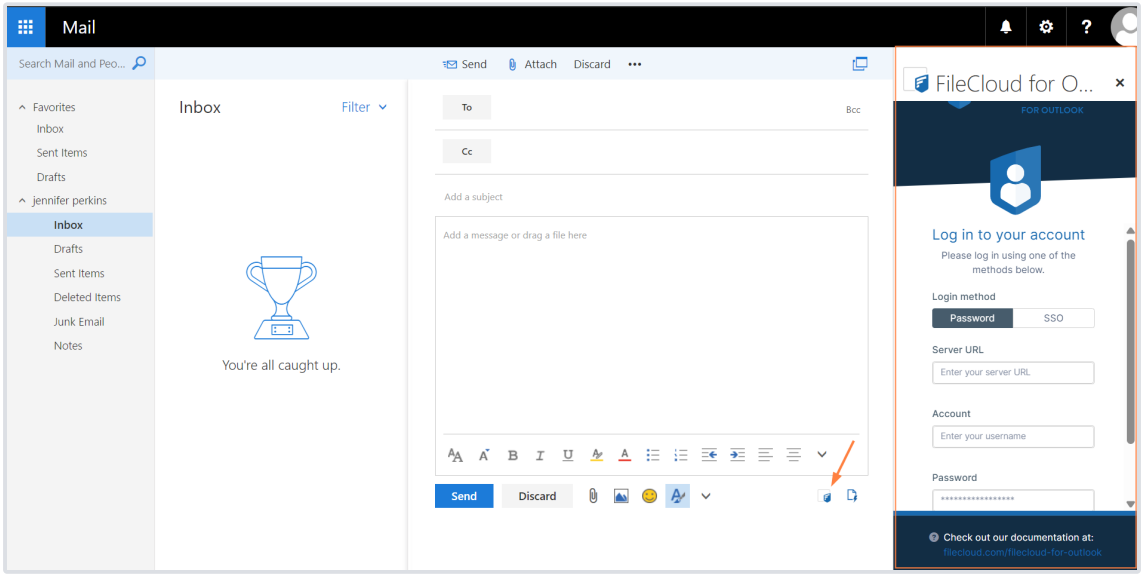
1. Go to https://store.office.com/app/download?assetid=WA200008392
   A page of raw XML is returned.
2. Save the raw XML.
3. Go to the Exchange admin center at **https://[your exchange server]/ecp**
4. In the navigation pane, click **Add-ins**.



5. Click **+** above the list of add-ins, and choose **Add from file**.



6. Click **Choose File** and choose the manifest file you saved.
7. Click **Next**.
8. Click **Install**.
9. Once the file is installed, click **Save**.
   The FileCloud for Outlook add-in is now available in Outlook.
10. Click the icon at the bottom of an opened message to open the add-in:



Integration With Office

FileCloud allows users to share any file or folder with custom permissions.

Install the FileCloud Office Add-In

The FileCloud Office Add-In is the recommended tool for adding FileCloud as a place because it provides a richer experience.

- It supports more versions of Microsoft Office and allows you to configure some of the associated settings.
- Installing the FileCloud Add-In allows you to work from your own workspace using your own software.

Installing the Office Add-In

To install the FileCloud Office Add-In:

1. Meet System Requirements

System Requirements

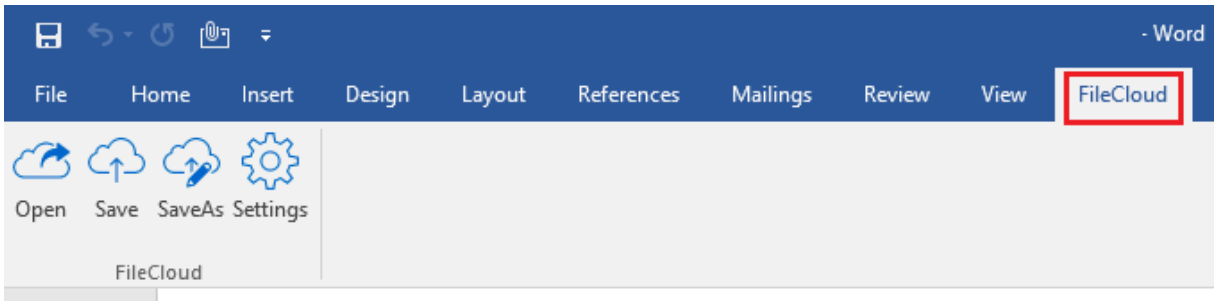
Requirement	Version	Notes
OS	Windows 7 and above	Older versions of Windows may work but have not been tested
Microsoft Office	Subscription to the latest version is recommended	Microsoft Office 2007 is the minimum version tested

2. Install the Add-In

To install the FileCloud Office Add-In:

1. Download and install the FileCloud Office Add-In through the link in your FileCloud customer portal.
2. Accept any security warning and continue installation.
3. Once the installation is complete, restart any open MS Office applications, such as Word or Excel.

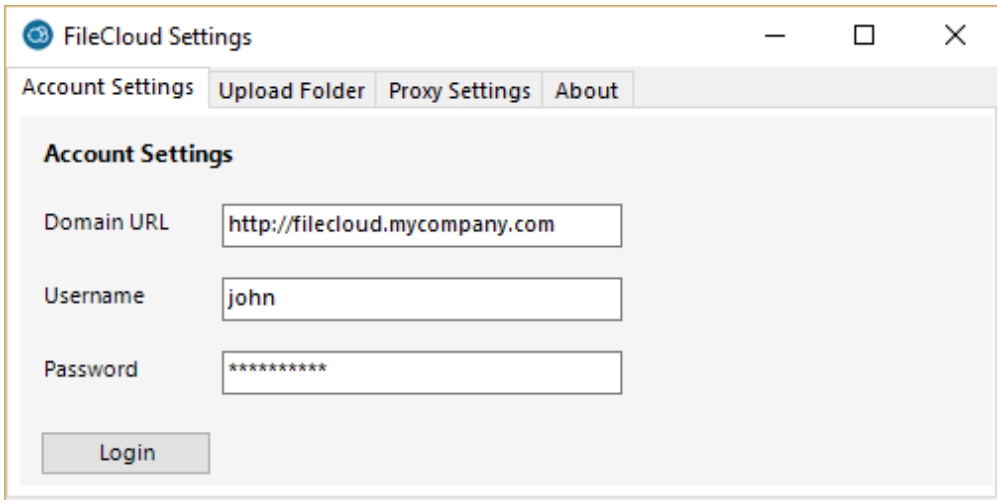
Once installed, FileCloud will appear as a Ribbon on the main window with the following buttons:



- *Open* (from FileCloud)
- *Save* (to FileCloud)
- *Save As* (to a new name or location in FileCloud)
- *Settings* (specify login credentials, default folders, and any proxy settings)

3. Enter Your Login Credentials

The login credentials, when set, are encrypted and stored securely.



To enter your FileCloud credentials:

1. In your MS Office application, on the FileCloud menu, click the *Settings* icon.
2. Click the *Account Settings* tab.
3. In *Domain URL*, enter the FileCloud URL.
4. In *Username*, enter the name you use to log in to FileCloud.
5. In *Password*, enter the string of numbers, letters and characters you use to log in to FileCloud.
6. Click *Login*.

4. Specify a Default Folder

If you do not specify a default folder, you will be prompted for a folder path every time you upload a file. If you have one place where you consistently save files, you can avoid this prompt and specify a default upload folder.

To specify a default upload folder:

1. In your MS Office application, on the FileCloud menu, click the *Settings* icon.
2. Click the *Upload Folder* tab.

5. Configure Proxy Settings

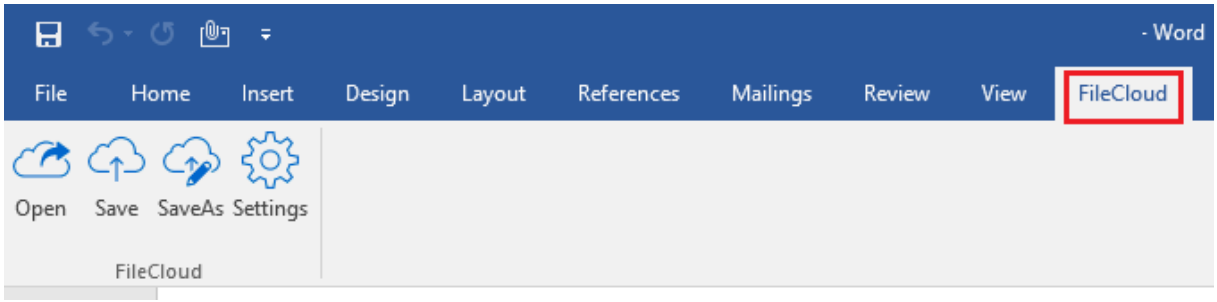
If your network uses a proxy server or you want the FileCloud Office Add-In to use a proxy server, you can configure proxy settings.

💡 To get the Proxy Server Address, Port, Username and Password to connect to your proxy server, contact your network administrator.

To configure proxy settings:

1. In your MS Office application, on the FileCloud menu, click the *Settings* icon.
2. Click the *Proxy Settings* tab.

Using the Office Add-In



To Use the Add-In Options:

1. To open a file, in your MS Office application, on the FileCloud menu, click the Open icon.
2. To Save a file to FileCloud, in your MS Office application, on the FileCloud menu, click the Save icon.
   💡 If the file was originally opened from FileCloud, the file will be automatically saved to that corresponding folder in FileCloud.
   💡 If the file is new, then you must choose the FileCloud path to save the file.
3. To save the file to a different location or with a different name, in your MS Office application, on the FileCloud menu, click the Save As icon.

Configure Sync for Edit in Desktop

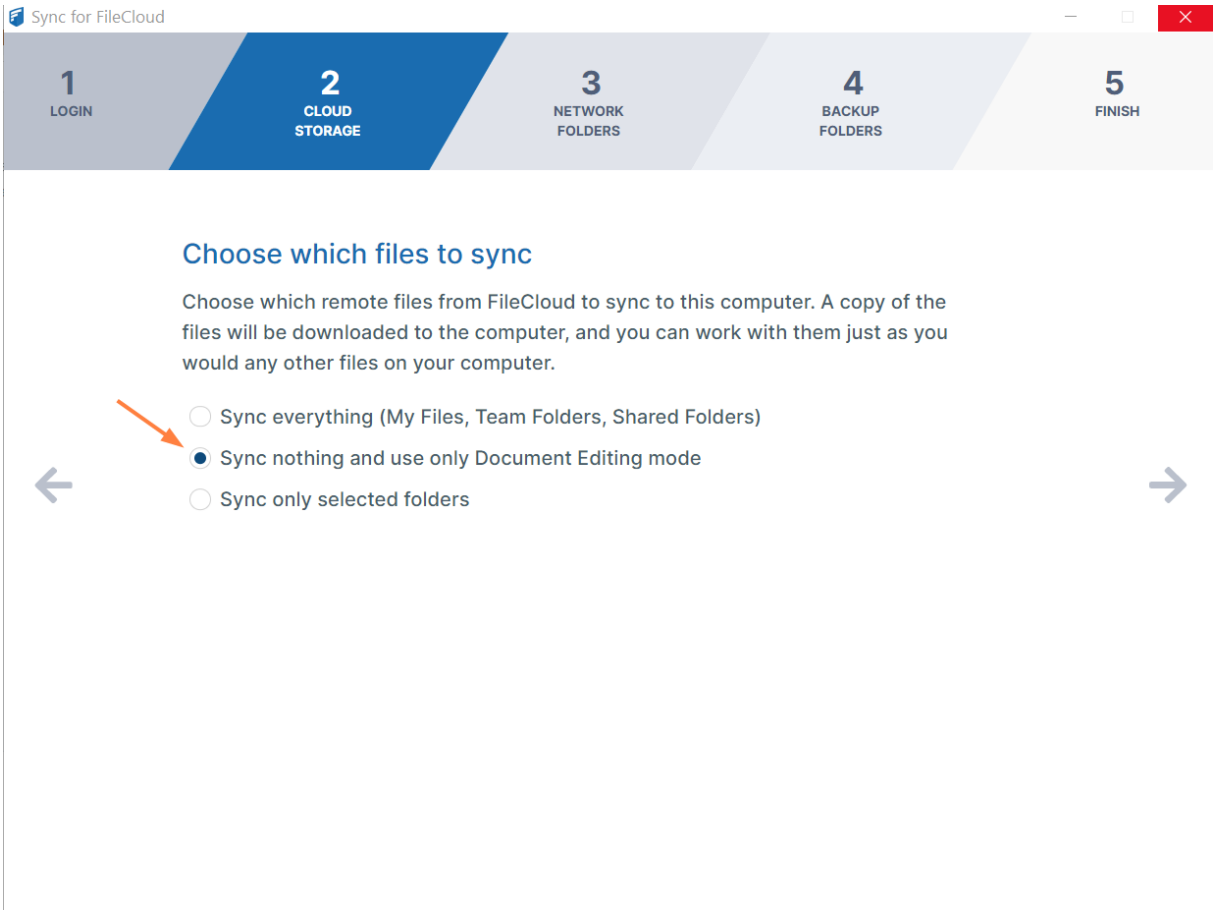
Edit in Desktop requires the Sync App to be installed on the local computer.
Edit in Desktop does not work when the Sync App is set to run as a service.

Edit in Desktop allows you to select a document file from the Web UI and automatically open it locally in its native document editor. Changes you save automatically appear in the cloud as new versions. This function is ideal for users who need to edit files on their desktops, but don't want to install FileCloud Drive or sync all files to their local machine. It's also more convenient than downloading, editing, saving and uploading the saved version back to the cloud.

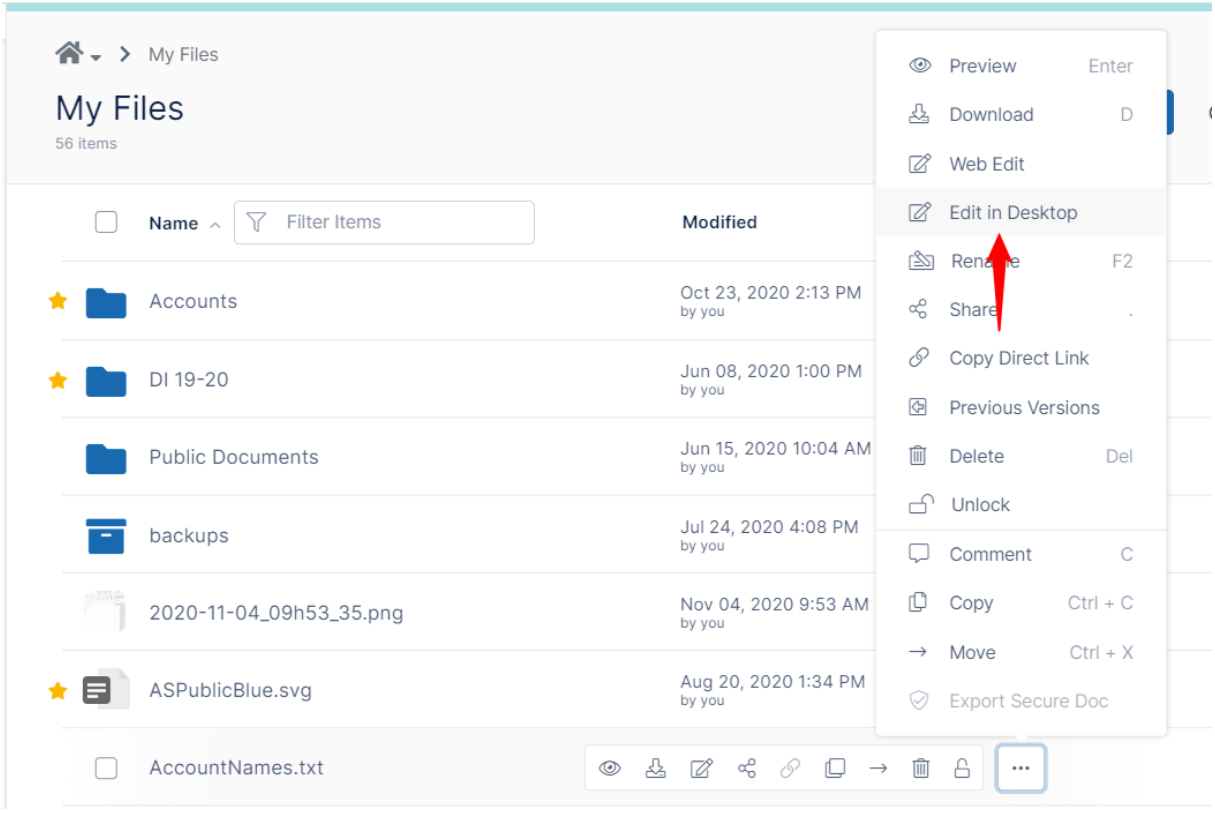
File types supported in Edit in Desktop include DOCX, DOC, PPTX, PPT, XLSX, XLS, IDD, PSD, XLSB, TXT and MD.

To perform Edit in Desktop, first install the Sync application locally on your computer.

When setting up account information, you may select the option to disable syncing and only provide document editing support. If you leave it unchecked, you will be able to use Edit in Desktop as well as Offline Syncing.



Next select any file in the web browser, and then click on the **Edit in Desktop** option to download and open the file in the local document editing application.



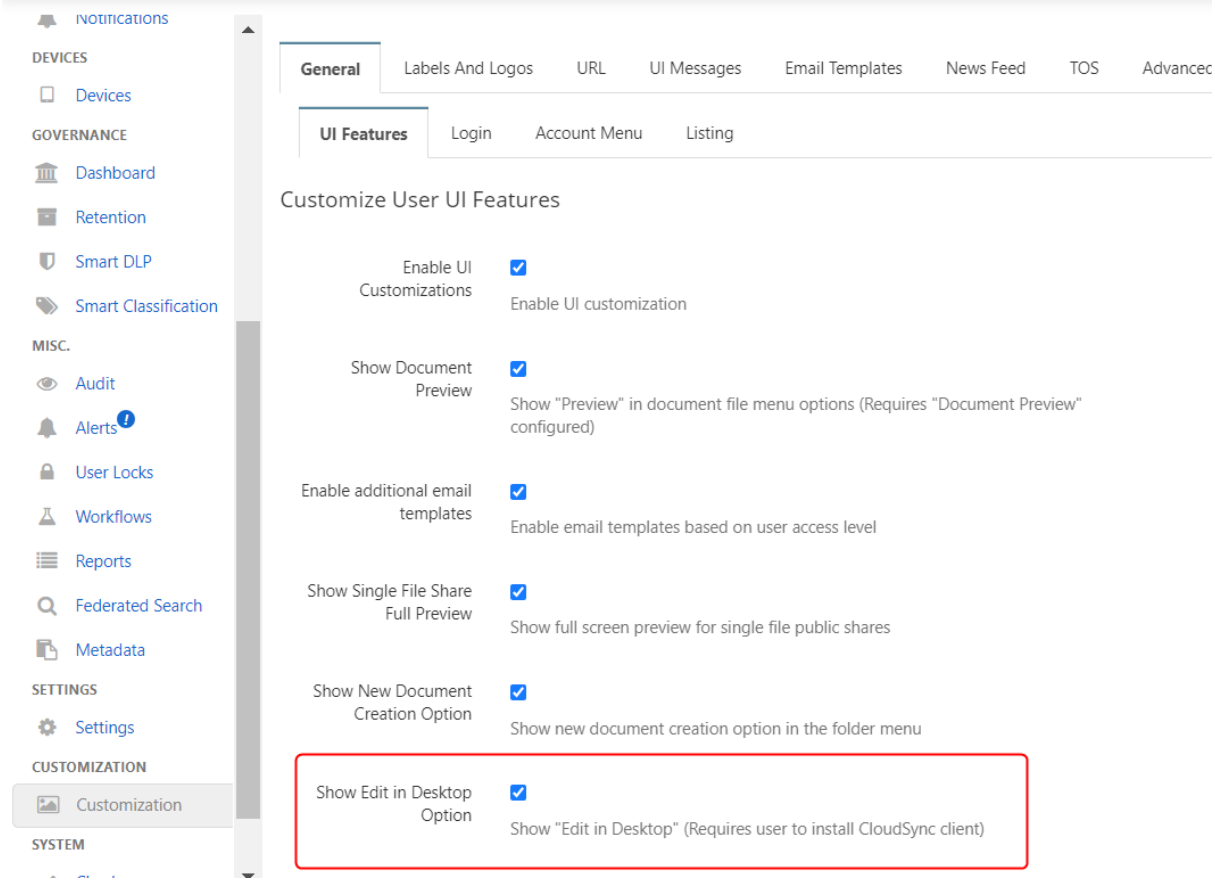
The document is opened in an editor, for example, Microsoft Word. Simply edit as you would normally and then click save. The file is saved to the server and a notification shows that the version has been saved.

You can continue to edit the document and save it. Each time you save it a new version is uploaded.

Note for Administrators:

To enable Edit in Desktop, you must check the customization option in the Admin control panel.

Go to **Customization → General → UI Features → Show Edit in Desktop Option.**



Access Files Using Mobile Apps

To access Office documents in iOS, see FileCloud iOS Integration with 3rd Party Apps.

To access Office documents in Android, see Using FileCloud with Other Android Apps.

Managing FileCloud Client Apps with MDM Software

This page is intended for FileCloud admins only, and addresses management of FileCloud client apps with MDM software. Individual MDM software applications may be configurable with certain operating systems only, and therefore may be effective with specific FileCloud client apps only.
At the current time, Miradore MDM has been tested with FileCloud Desktop for macOS and FileCloud Desktop for Windows. The examples given below use Miradore MDM configured for FileCloud Desktop for Windows. However, other MDM software that supports Windows and macOS may be used with FileCloud Desktop and other FileCloud clients..

See Using MDM Software with FileCloud Mobile Apps for information about using MDM software with FileCloud's mobile apps.

Mobile device management (MDM) software enables you to manage all of your users' devices and apply security to them. You can use MDM software with FileCloud's client apps installed on laptop, desktop, and tablet computers.

To add a FileCloud client to MDM software:

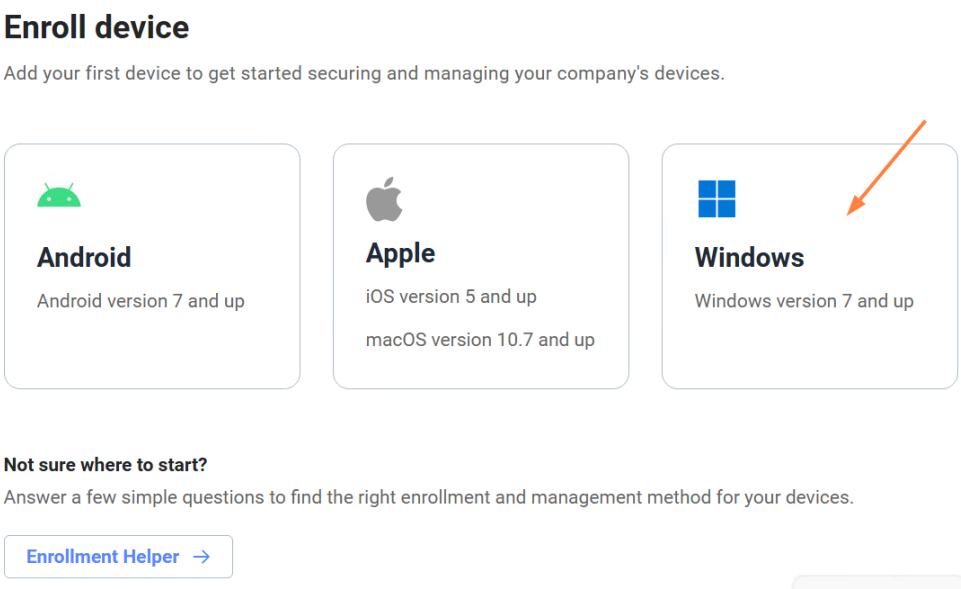
1. Enroll Your Device

Since there are many MDM providers and ways to enroll, please check your MDM documentation for instructions on how to enroll your users' devices.

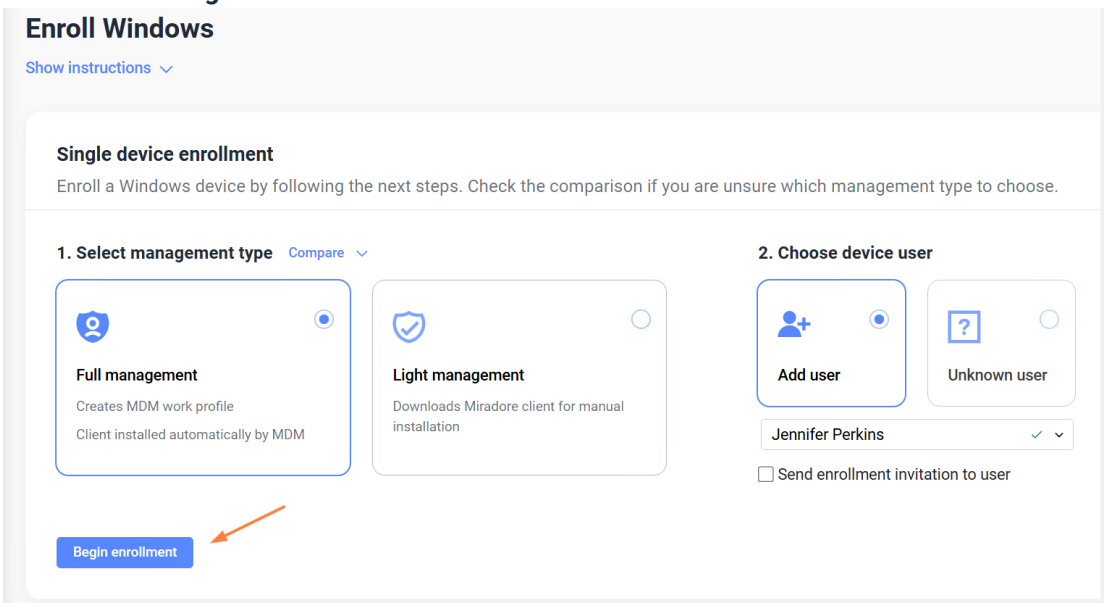
As an example, to enroll your users' Windows devices in Miradore MDM:

1. Log in to Miradore MDM.
2. Add or import the device user(s) to Miradore MDM.
3. In the navigation panel, go to **Enrollment > Enroll Device**.

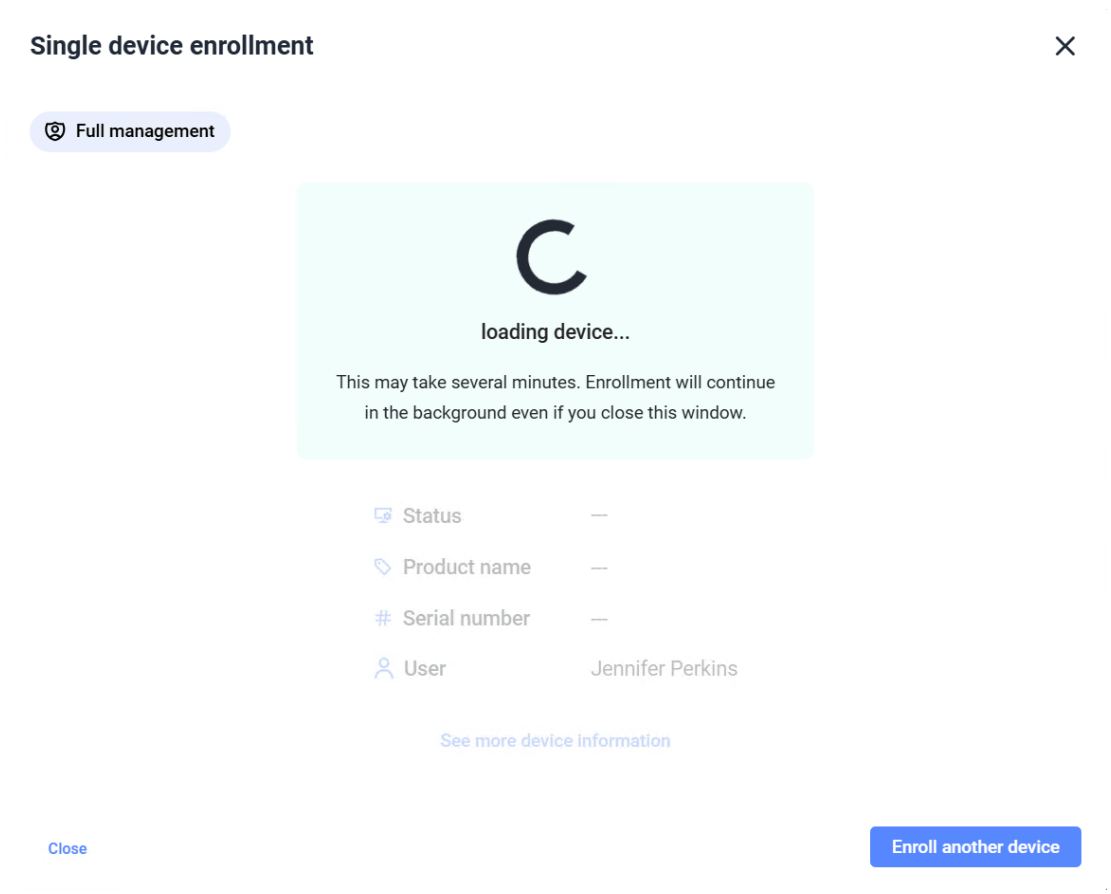
4. Click the Windows icon.



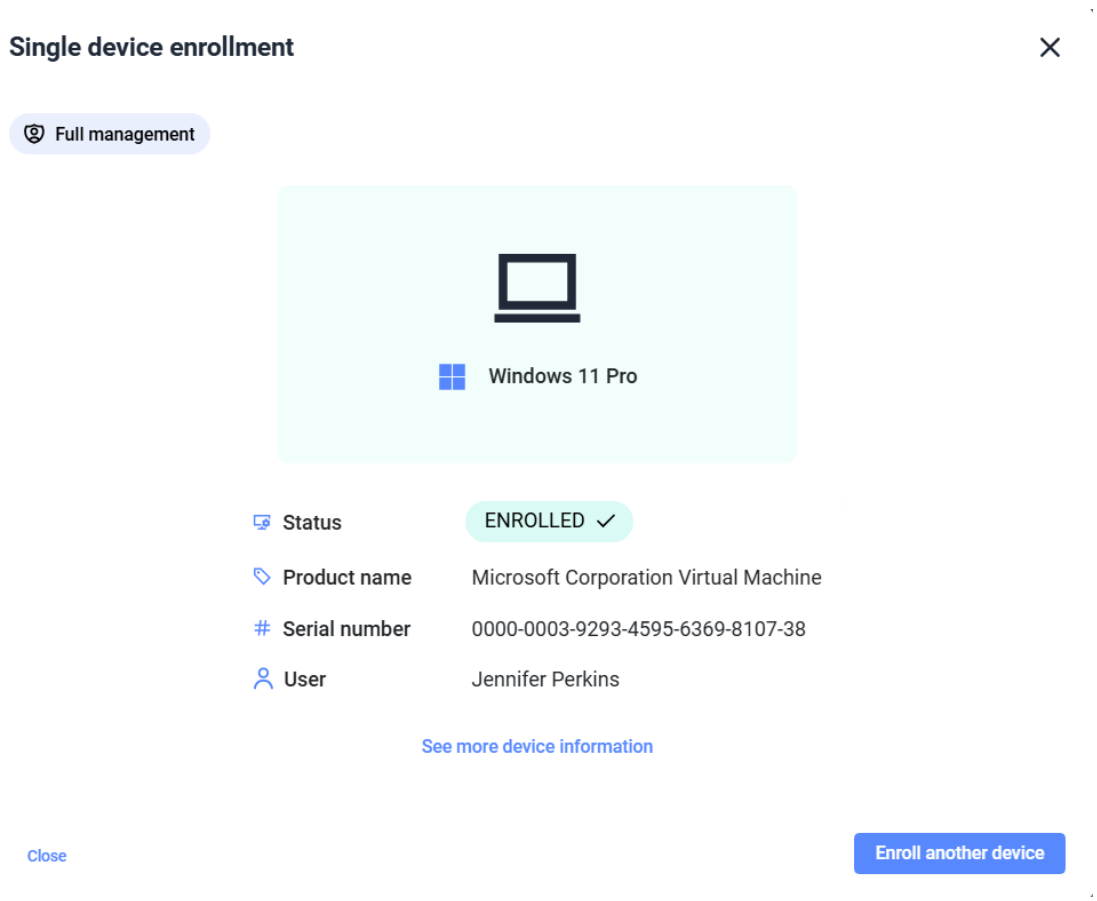
5. Under **Single device enrollment**, leave **Full management** and **Add user** selected. Then choose a user and click **Begin enrollment**.



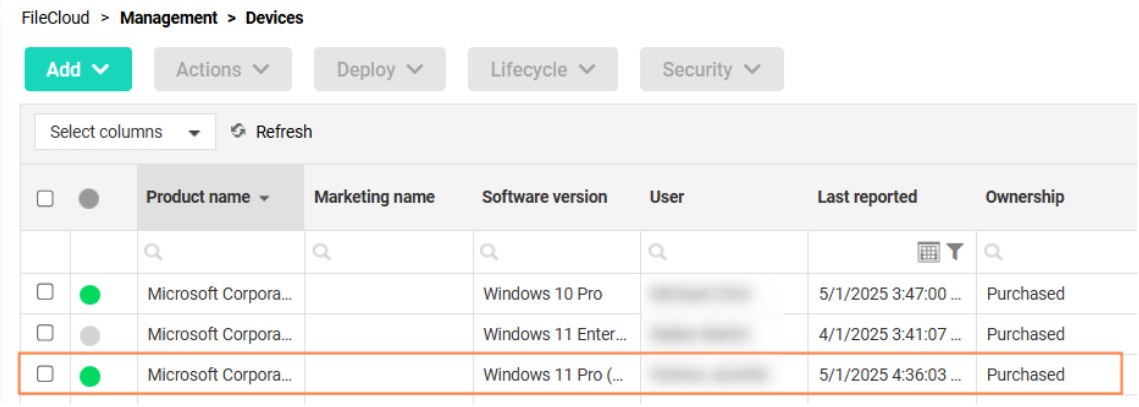
The screen indicates that the user's device is being enrolled.



It notifies you when enrollment is complete.



6. To confirm that the device is actively enrolled, in the navigation panel, go to Management > Devices and check that the device is listed with a green icon.



2. Add the FileCloud client app to your MDM

Please check your specific MDM's documentation for instructions on how to add an app to your MDM software.

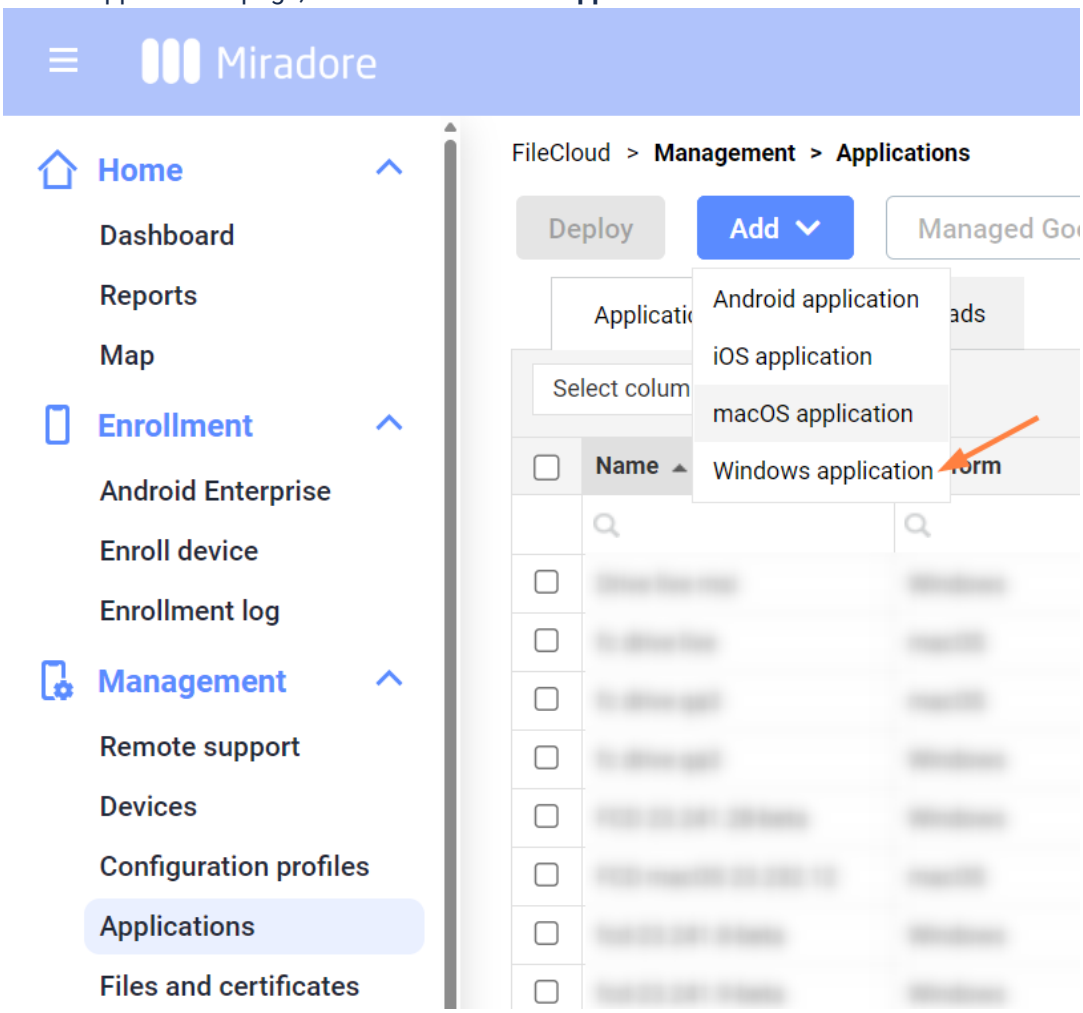
In general, the steps for adding a FileCloud client app to your MDM are:

1. Download the application package of the FileCloud client.

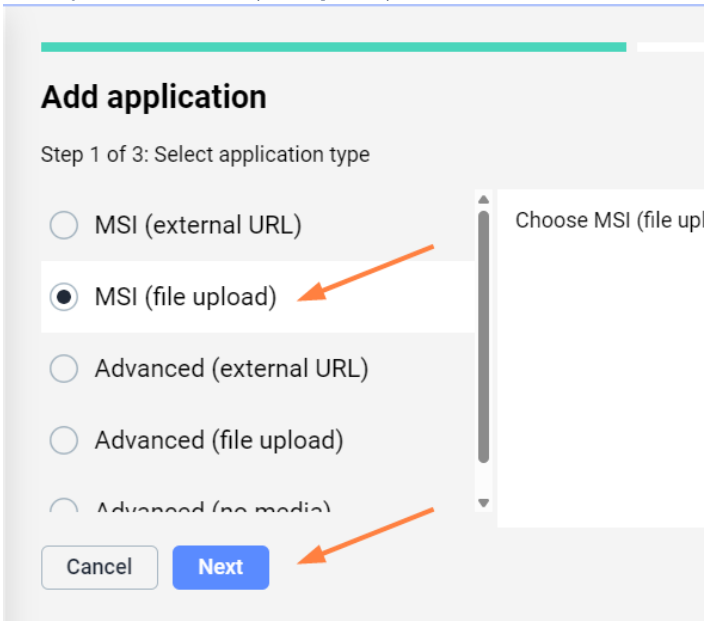
2. Open your MDM software.
3. Add the FileCloud client app.
4. Assign or deploy the FileCloud client app to the devices enrolled with the MDM.

For example, to add FileCloud Desktop for Windows to Miradore MDM:

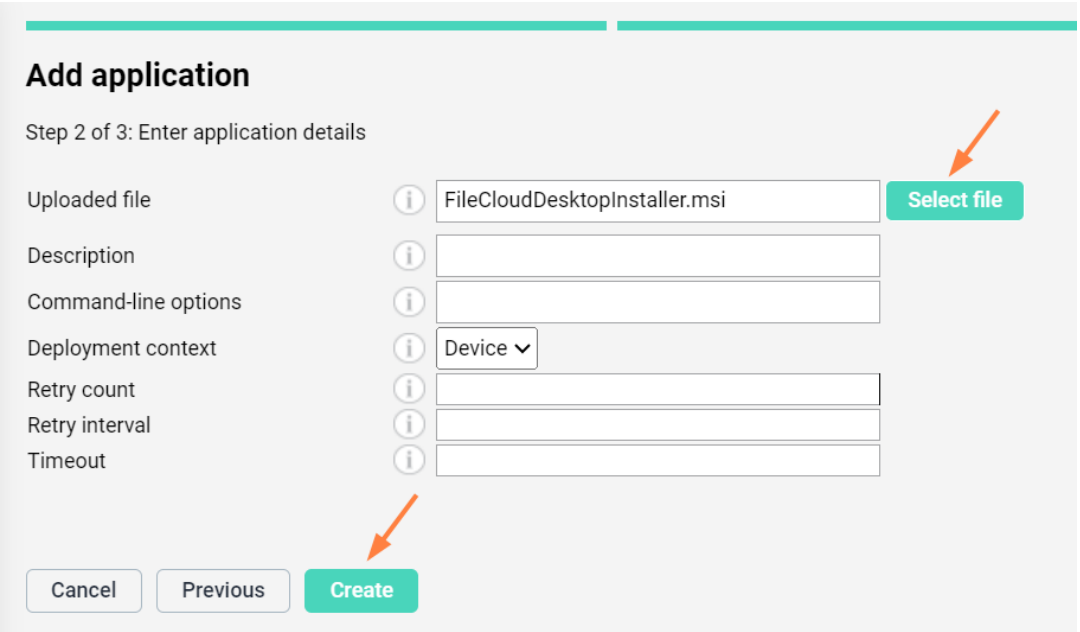
1. Download FileCloud Desktop for Windows at https://www.filecloud.com/additional-downloads/.
2. Log in to Miradore MDM.
3. Add FileCloud Desktop for Windows to Miradore MDM.
   a. In the navigation panel, go to **Management > Applications**.
   b. On the Applications page, click **Add > Windows application**.



c. In Step 1, select **MSI (file upload)**, and click **Next**.

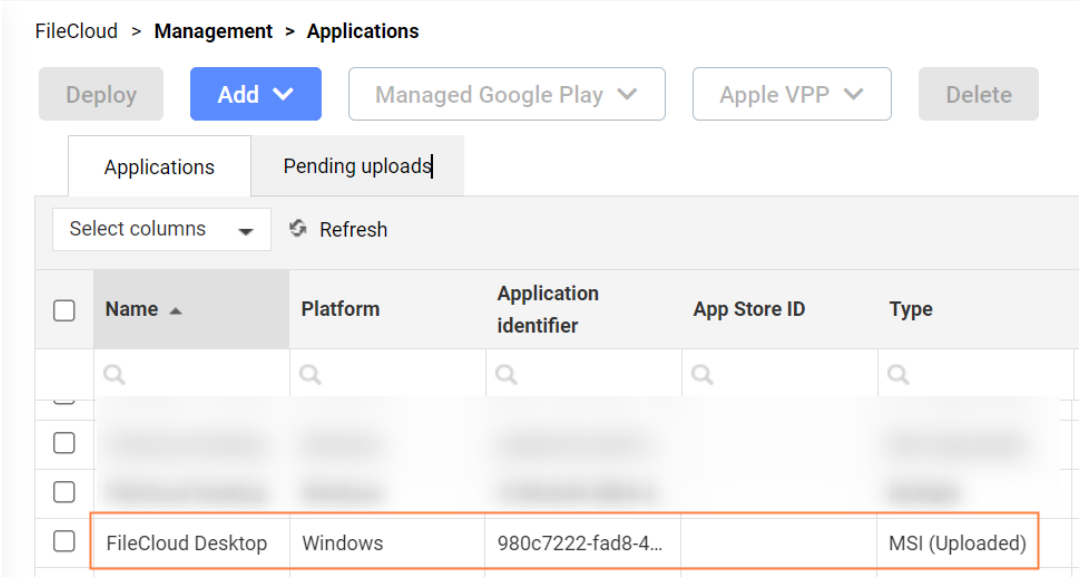


d. In Step 2, select the FileCloudDesktopInstaller.msi file, and fill in any the other fields. Leave **Deployment context** set to **Device**. Then click **Create**.



The application is uploaded and appears in your list of applications. Note that it may

appear in **Pending Uploads** until it is uploaded.

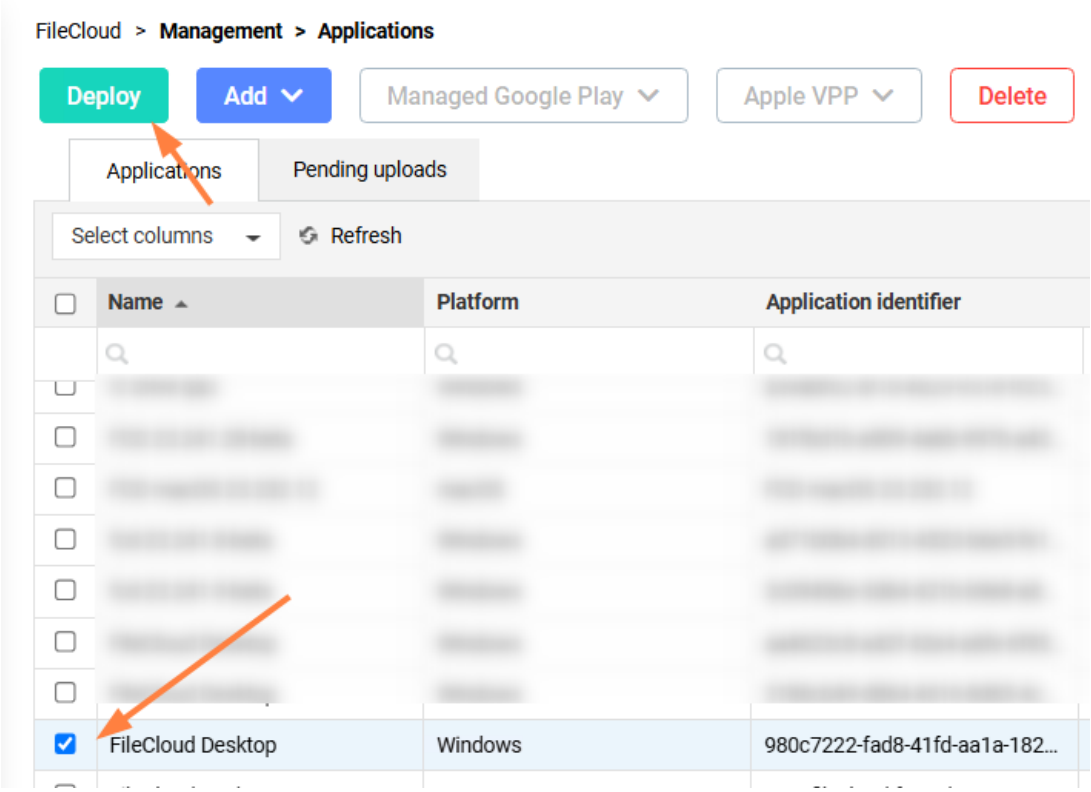


3. Deploy the FileCloud App to the devices

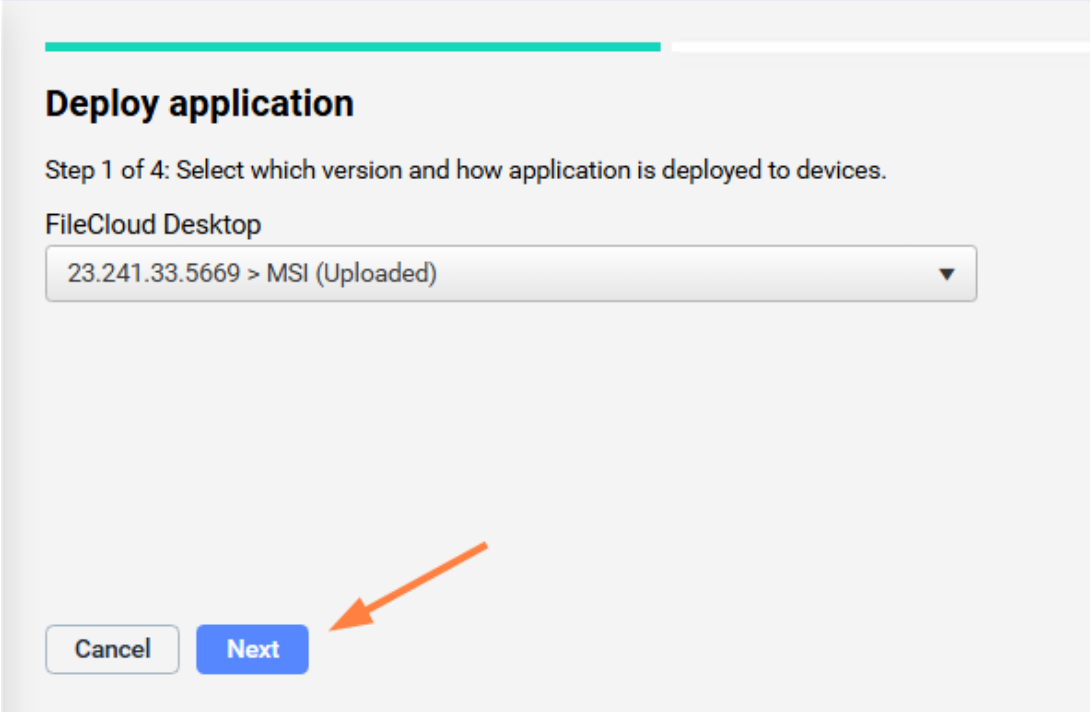
Deploying the FileCloud client to the devices enables you to manage them with the MDM.

To deploy the FileCloud client to an enrolled device in our Miradore MDM example:

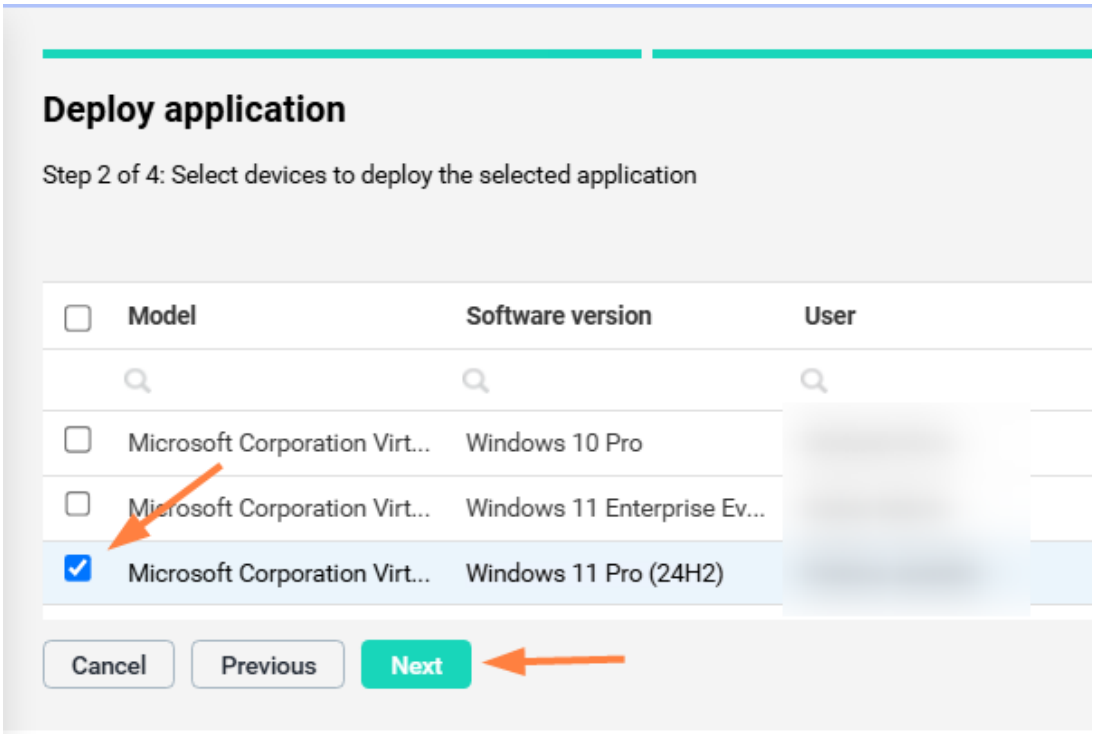
1. Navigate to the Management > Applications page if you are not already there.
2. Check the FileCloud client that you want to deploy to the device or devices you enrolled, and click **Deploy**.



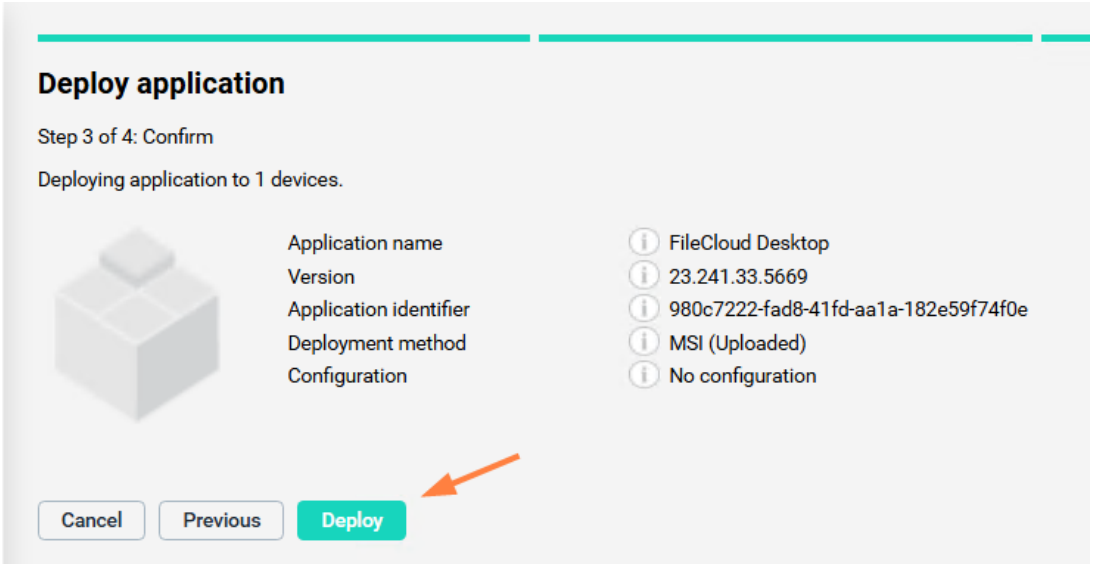
3. Click **Next**.



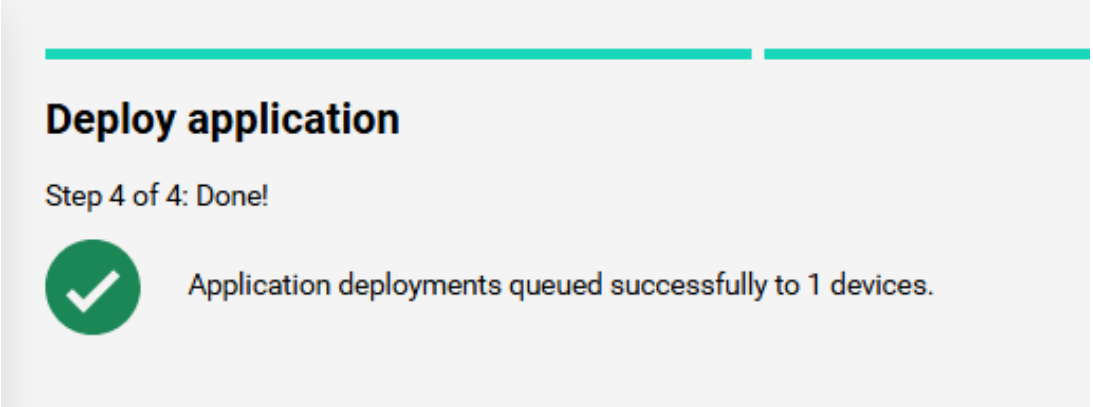
4. Check the device or devices to deploy the application to, and click **Next**.



5. Review the deployment information, and click **Deploy**.



You receive confirmation that the application is deployed.



Now you can manage use of FileCloud Desktop for Windows on the devices it has been deployed to.

To update a FileCloud client app in MDM software:

1. Follow the process described in Step 2, above, for adding the FileCloud client app but upload the new version of the file.
   It is listed under **Applications** like the original file.
2. Follow the process described in Step 3, above, for deploying the updated application to the devices you previously deployed it to.