FileCloud Online
Version 23.263
About FileCloud Online

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What is FileCloud Online?

FileCloud is a file access, sharing and sync solution for enterprises. While FileCloud Server is an on-premises solution, FileCloud Online is hosted by FileCloud and offered as a service (SaaS) to customers.

- FileCloud provides complete control, strong security, and access to your data from anywhere using a variety of clients.
- FileCloud also provides sync clients for Windows, Mac and Linux OS and mobile access clients for iOS and Android.
- You also have the option of mounting your FileCloud data as a local drive using our Windows and Mac Drive clients.

How Do I Begin Using It?

To begin using FileCloud Online, follow the instructions on the page FileCloud Online Quick Start Guide to register for a trial and to begin using it.

Administrator	Uses the account provided by FileCloud to set up: • Users • Device management • Team folders • Security • Compliance
User	Uses the account created by FileCloud to: • Log in • Add files • Access files remotely from mobile devices • Share files and folders • Sync local workspaces with your FileCloud hosted site

Still need more help?
Contact FileCloud Support

FileCloud Online Quick Start Guide

Active Directory (AD), single sign-on (SSO), and data leak prevention (DLP) features are only available in some versions of FileCloud Online.

Follow the steps in this guide to start sharing and syncing your files through the FileCloud Online service.

Begin by registering for a trial version and exploring FileCloud with the sample users and files we provide you with. Then create your own components to see how FileCloud Online works with your specific use case.

1. Register

- Go to: https://www.filecloud.com/#Trial and click **Online**.
- Start a free trial
- Check your email for your site URL and credentials

We host the FileCloud site for you.

- FileCloud creates the site based on the team name you use when registering for a trial.
  For example: ***https://<yourteamname>.filecloudtrial.com***
- FileCloud sends you an email with your trial username and password as well as links to your user and Admin sites. Log in to both sites with the username and password sent to you.

2. View and Add User Accounts

User accounts let employees in your company access the FileCloud Online user site so they can share and sync files. When you begin the FileCloud Online trial, your user account with the username sent to you has been added to the system for you. The password for this account is the password you specified when you created it.

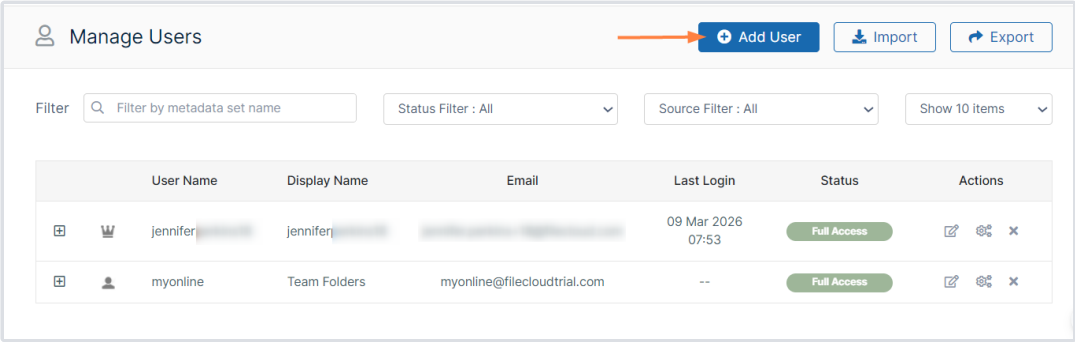
1. To view the user account, log in to the Admin portal with your user account or email address, and click **Users** in the navigation panel.
   The **Manage Users** screen shows your user account and the Team Folder account. The Team Folder account has the subdomain name you entered when you chose your URL.

   Your user is an admin user, which means in addition to logging in to the user portal, you can log in to the admin portal and perform admin functions. Your user account has access to all administrative functions.
2. Add additional user accounts and see what users with different levels of permissions can do. See User Account Types for more information about user permissions.
   Add users to FileCloud

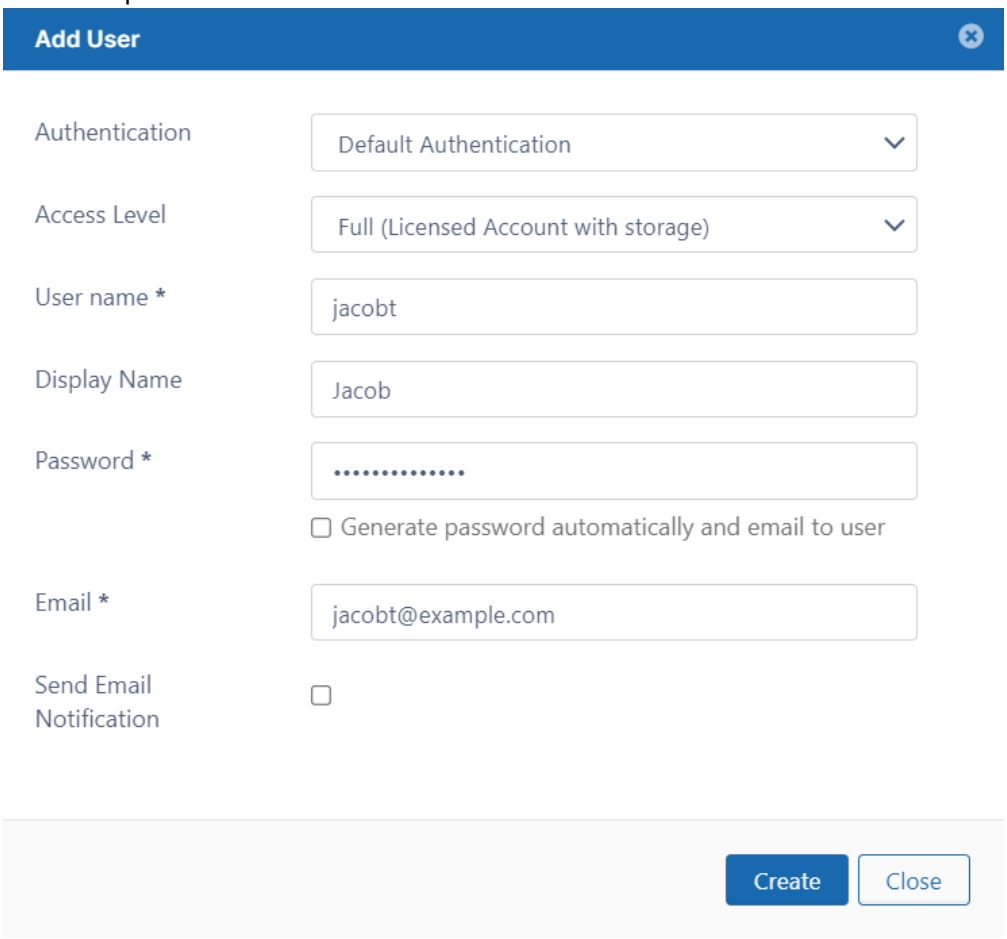
> The default user storage quota for every new user is set in Managed Storage. See Setting up Managed Disk Storage

To create a FileCloud user with default authentication:

a. Log on to Admin Portal.
b. In the left navigation panel, click **Users.**
c. In the top right corner, click the **Add User**.



d. Set the required account information.



Settings	Description
Authentication	Allows you to select the authentication type for granting access into the system. • **Default Authentication -** creates a local user account. User credentials are stored and authenticated within FileCloud. • **Active Directory or LDAP -** creates an external user account. User credentials are stored and authenticated from an external LDAP or AD server.
Access Level	Allows you to select the user type. A user account with Full or Guest access counts as a license.
User name	Name to be used to log into the system. By default, **User name** can only contain numbers, spaces, hyphens, periods, underscores, and letters from the Latin alphabet (A-Z, uppercase and lowercase). Email addresses may not be used as usernames, but they may be used to log in to the user portal **Note**: To also enable use of apostrophes in the **User name**, go to **Settings > Admin** and check **Allow Email as Username**.
Display name	Name that appears on user interface.
Password	Password for the user (Should adhere to password length and strength requirements for your organization). Either enter a password here, or check the following box.
Generate password automatically and email to user	Have FileCloud generate a password according to your settings for password limitations, and email it to the user. Anything entered into the **Password** field is ignored.
Email	An email id that is unique in the FileCloud system
Send Email Notification	When checked, a welcome email is sent to the new user. Unchecked by default. If you uncheck this, you can send a welcome email with a newly generated password later. See Send Email from User Details.

e. Click **Create**.

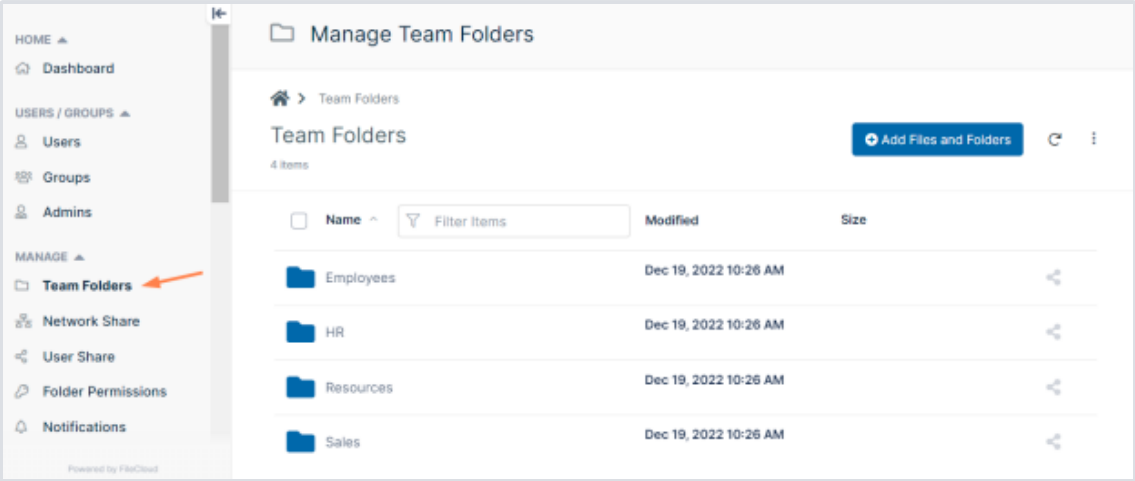
Also see:
Import a user account from AD or LDAP Service
Bulk creation of User Accounts from a CSV File
Managing Groups

3. Configure Team Folders

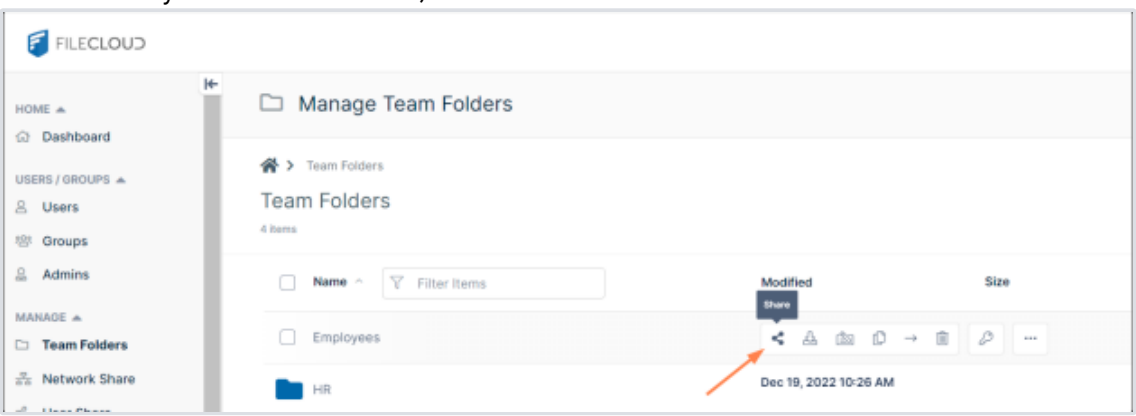
Team Folders are an easy way to share files and folders among a team. When you begin the FileCloud Online trial, a Team Folders account and four Team Folders have already been set up for you.

To see your Team Folder account:

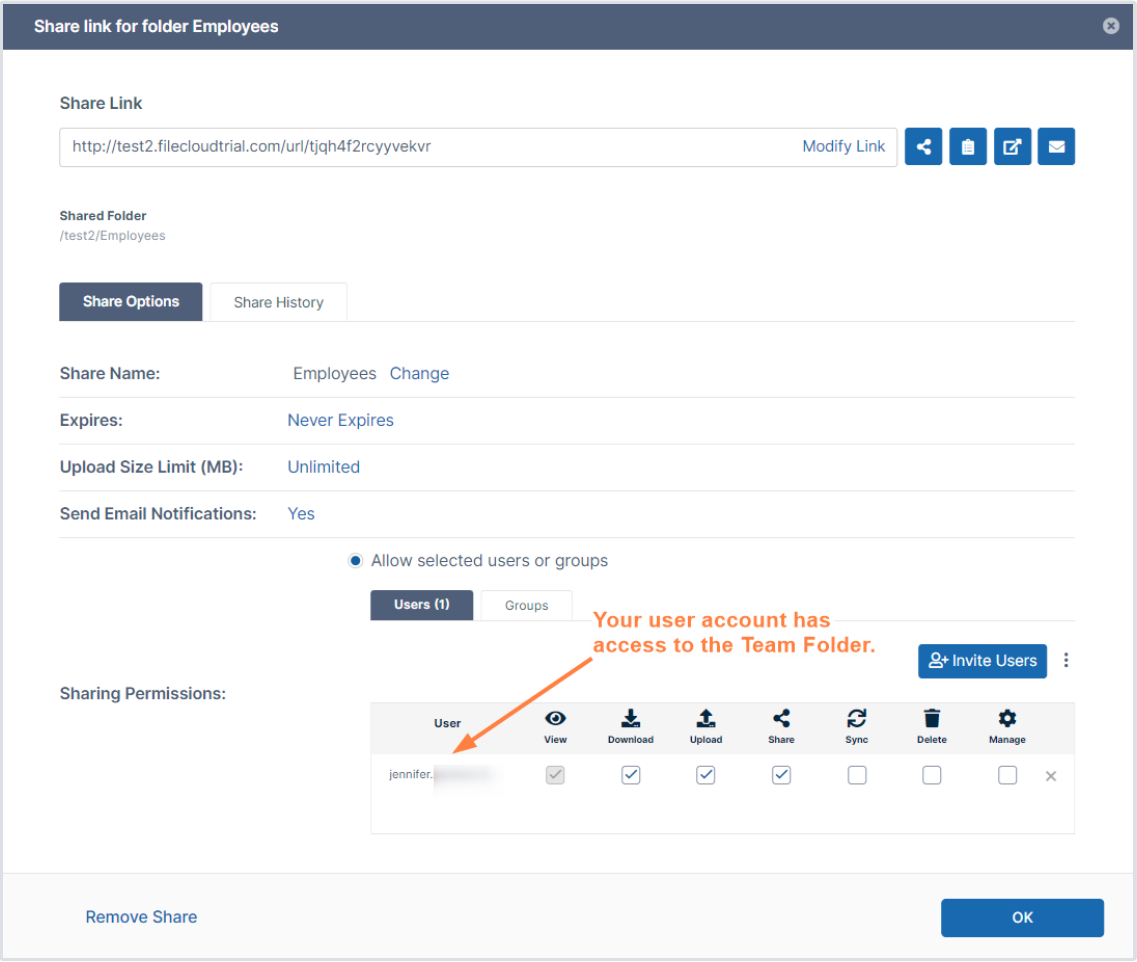
1. In the FileCloud admin portal's left navigation bar, scroll down and click **Settings**. Then, on the **Settings** navigation page, click **Team Folders**.
   The **Manage Team Folders** settings page opens.
2. Several sample Team Folders are already created for you.



3. Hover over any of the Team Folders, and click the share icon:

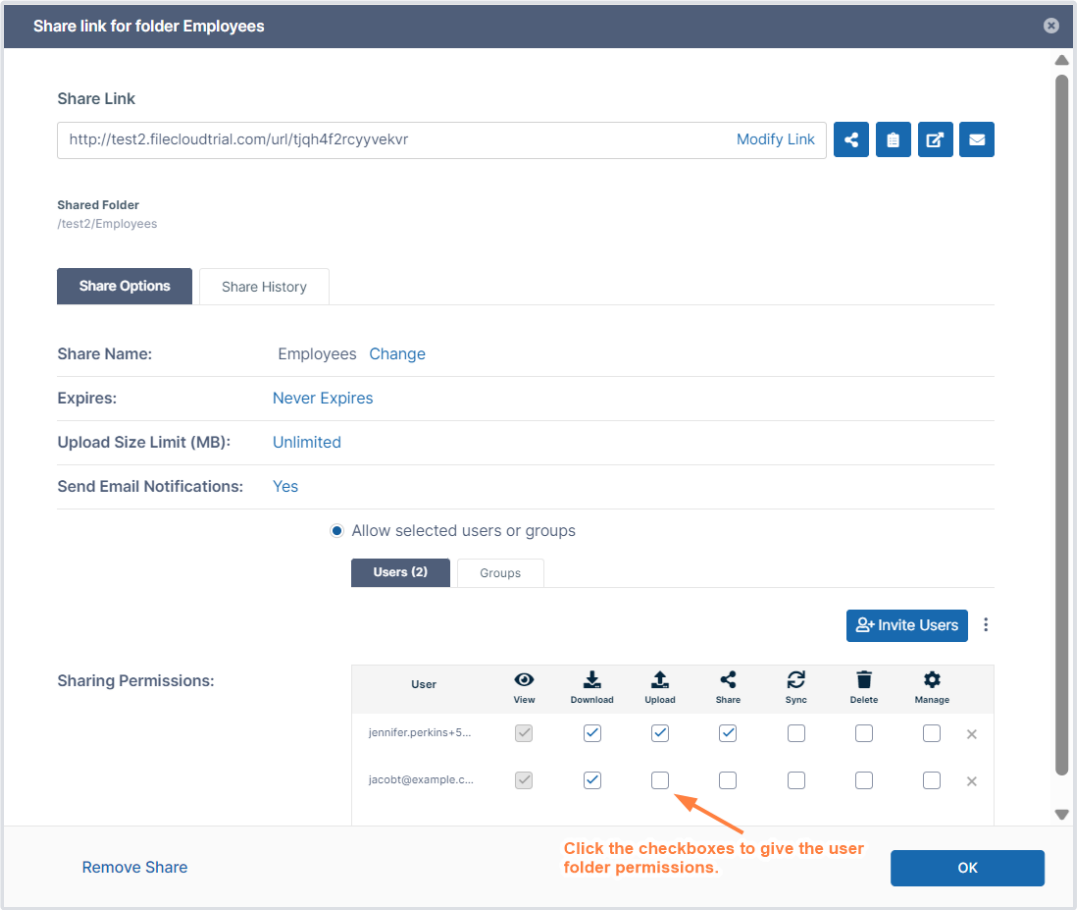


A **Share link for folder** dialog box opens and shows you which users the Team Folder are shared with and what their access to the folder is. When you begin a FileCloud trial, only your user account has access to the Team Folders.



If you log in to the user portal using your user account, you'll see that your account has access to all four team folders. If you log in as the user you created above, you'll see that the new user does not have access to any Team Folders.

4. Share the folder with your new user.
   a. In the **Share link for folder** dialog box, click **Invite Users** and add find the user in the search box.
   b. Add the user to the share.
   c. Check the permissions boxes to give the user permissions to the Team Folder.



5. Log in to the user portal as user you just created (or refresh the screen if you are already logged in).
   Now that user's screen lists **Team Folders** in the navigation panel and has access to the Team Folder you have just shared.

When you set up FileCloud to use with your users, you can set up your own Team Folders. See Seed and Organize Team Folder Data.

Also see:

Share Team Folder and Set Share Permissions for users and groups

Setting Folder-Level Permissions on Team Folders

4. Configure Security

Security means not only verifying the identity of someone who connects to a network resource, but also setting alerts to know when there are problems and setting permissions on folders shared on the cloud.

Administrator	To manage security, choose how you want to secure your resources: Single sign-on (SSO) • FileCloud supports SAML (Security Assertion Markup Language) based web browser Single Sign On (SSO) service. • SSO provides full control over the authorization and authentication of hosted user accounts that can access FileCloud Web based interface. Multi-factor authentication • Multi-factor authentication (MFA) refers to the multiple-step verification process that is available in FileCloud. • This verification is designed to provide an extra layer of security. View Alerts • Allow FileCloud to track all unhandled exceptions, system error messages generated in the FileCloud server. • The number of alerts are shown in the Dashboard and the Alerts page • The alerts show detailed information about the various errors encountered. Send Email Alerts • You can also set alerts to send notification on specific user actions or system status. Manage Folder Level Permissions • In many sharing scenarios, you might need to setup folder permissions so that even if a top level folder allows some actions, a specific subfolder does not.

To maintain your FileCloud Online site, see FileCloud Online Administrator Tasks.

5. Work in the User Portal

Once you have the site configured, you can log in to the user portal to see how your end users will experience FileCloud.
Go to https://[yourcompanyname].filecloudtrial.com and log in with the account and username originally sent to you.

For links to end user features available to FileCloud Online users, see FileCloud Online User Tasks

When you are ready to go live:

- Contact your account manager to discuss pricing and next steps.
- We'll remove any test components, but you can keep any that you'd like to use in your live system and continue to build from what you have already created.
- We'll change your site address from ***https://<yourteamname>.filecloudtrial.com*** to ***https://<yourteamname>.filecloudonline.com***

FileCloud Online Administrator Tasks

Active Directory (AD), single sign-on (SSO), and data leak prevention (DLP) features are only available in some versions of FileCloud Online.

Follow the steps in this guide to start sharing and syncing your files through the FileCloud Online service.

What Can Administrators Do with the FileCloud Site?

Although FileCloud is hosting and maintaining your site, you still need to configure a few basic settings before allowing users to log in.

Administrator	You should use the administrator account provided by FileCloud to perform the following tasks: Access the Admin Portal • Log in to the FileCloud Online Administrator dashboard • Enable Team folders Manage Users • Create users manually • Import a user from Active Directory or LDAP • Create users in bulk using a CSV file • Create user groups for easy sharing Manage Folders • Best Practices for Organizing Your Folders • Create team folders Manage Security • Enable single sign-on • Enable multi-factor authentication for additional security • Set alerts to send notification of specific user actions or system status • Set folder-level permissions Customize Your Site • Add a logo to the hosted site • Choose the background image for the Website and Mobile app user portals • Customize email messages

Login to the Administrator Portal

When you initially register for a FileCloud Online trial, you are sent a welcome email with a user name and password you can use to access both the admin portal and the user portal. The account

associated with this user is an admin user account, which means that the account owner is an end user with administrative privileges. Once you purchase FileCloud, you are given a main admin account that has complete control over the FileCloud site and all other users.

> After you log in for the first time with the password provided by FileCloud, you should change the password immediately.

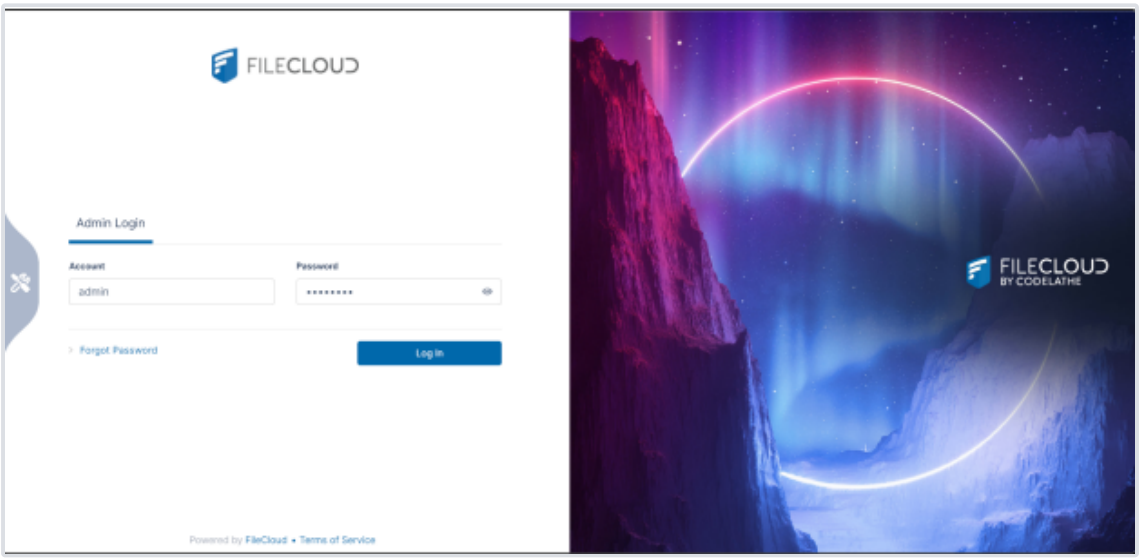
You can use any of the following supported web browsers to access the admin portal:

- Google Chrome
- Microsoft Edge
- Mozilla Firefox
- Safari

Logging in to the admin portal

To log in to the portal using your promoted admin or main admin account:

1. Open a Web browser.
2. Enter the URL for your admin portal: **https://<yourteamname>.filecloudonline.com/admin**
3. Type in the user name and password provided in the welcome email sent by FileCloud or the admin name and password.



4. You are prompted to change your password after the first login.

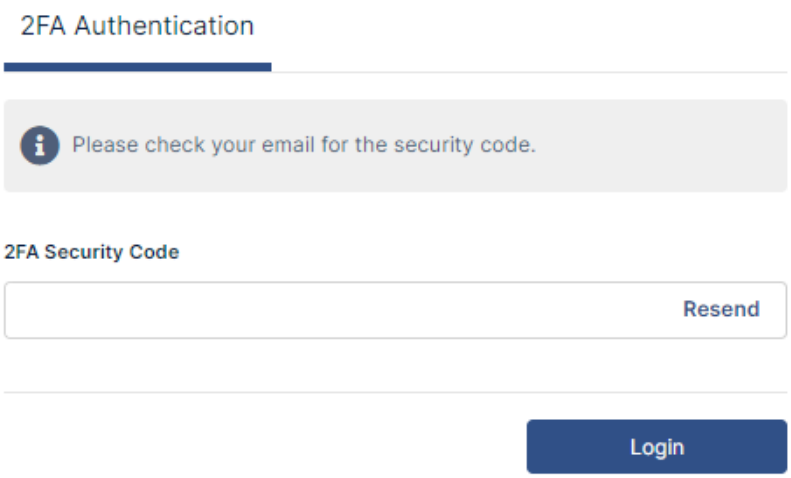
Log in using 2FA

- 2FA validation codes remain valid for 5 minutes by default. After 5 minutes, you must click **Resend** to get a new code.
- If you are a promoted admin, the login method configured for your user portal login is used for your admin portal login. However, if 2FA is set up for your admin portal login, your admin may require you to use that method for logging in to the admin portal.

Two-factor authentication via email code delivery

If two-factor authentication is configured to use your email address, then the 2FA security code is sent to the email address associated with your FileCloud account.

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



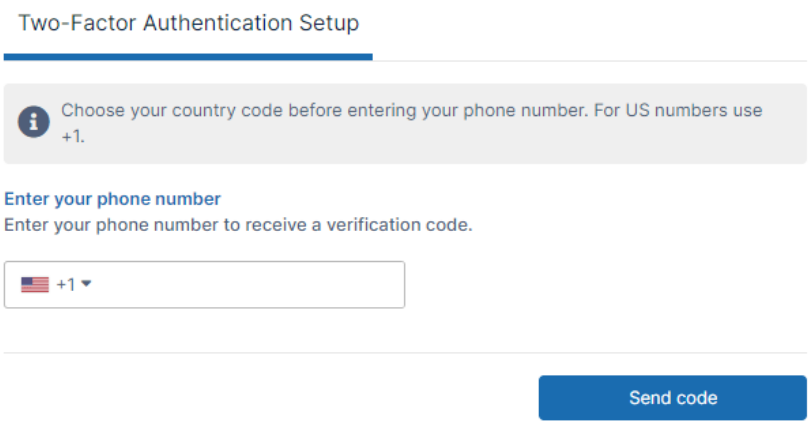
2. Check your email for the message with the code, and enter it into **2FA Security Code**.
3. Click **Login**.
   You are logged in to FileCloud.

Two-factor authentication via SMS code delivery

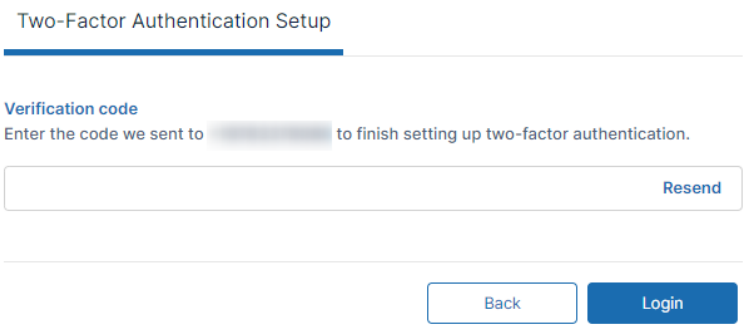
If two-factor authentication is set up to use SMS, then you will receive a code via the phone number associated with the account.

The first time you log in using SMS

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



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

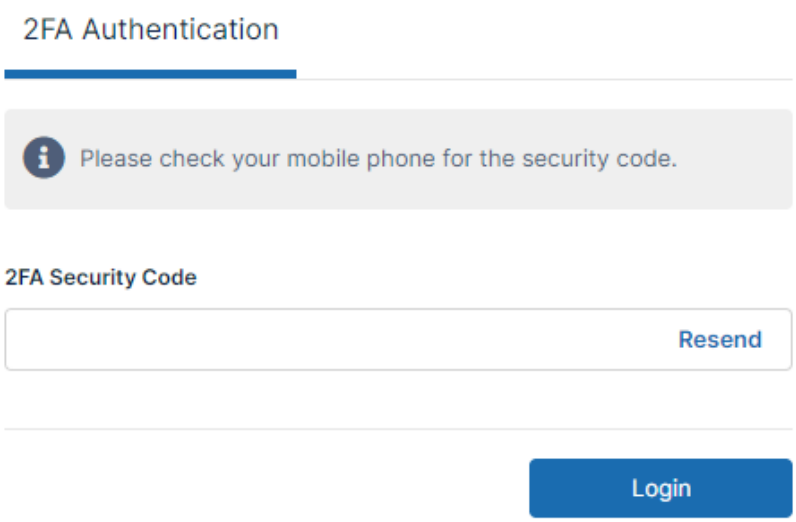


3. Check your phone for the code, and enter it into **Verification code**.
4. Click **Login**.
   You are logged in to FileCloud.

After the initial time you log in using SMS

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

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



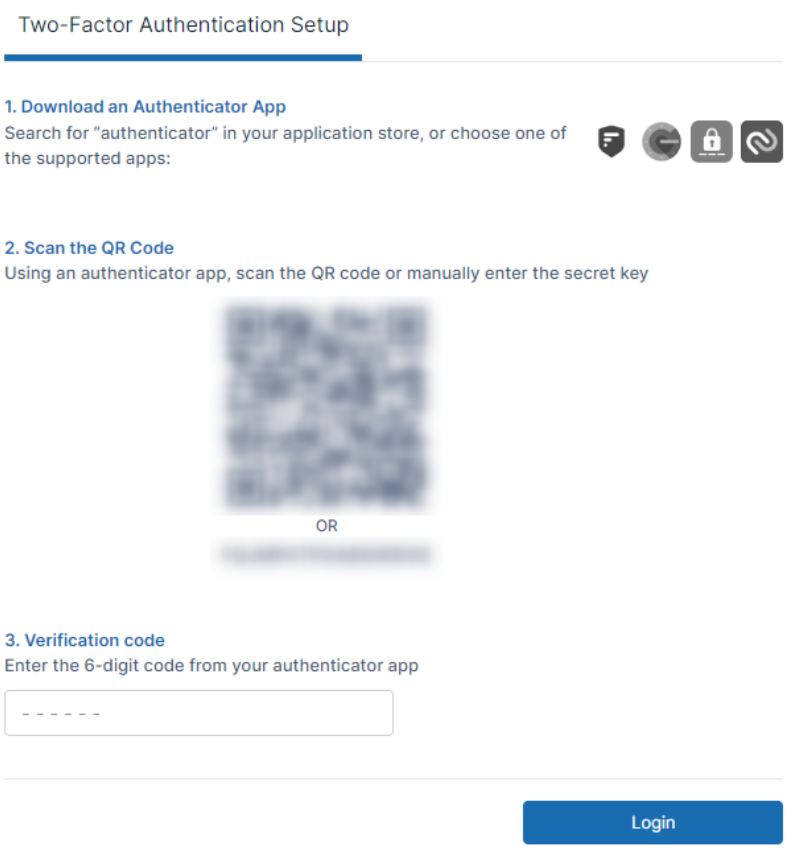
2. Check your phone for the code, and enter it into **2FA Security Code.**
3. Click **Login**.
   You are logged in to FileCloud.

Two Factor Authentication with TOTP

If your admin sets up 2FA with TOTP, the dialog box prompting you for your security code will direct you to check your authenticator app for the code.

The first time you log in using TOTP

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

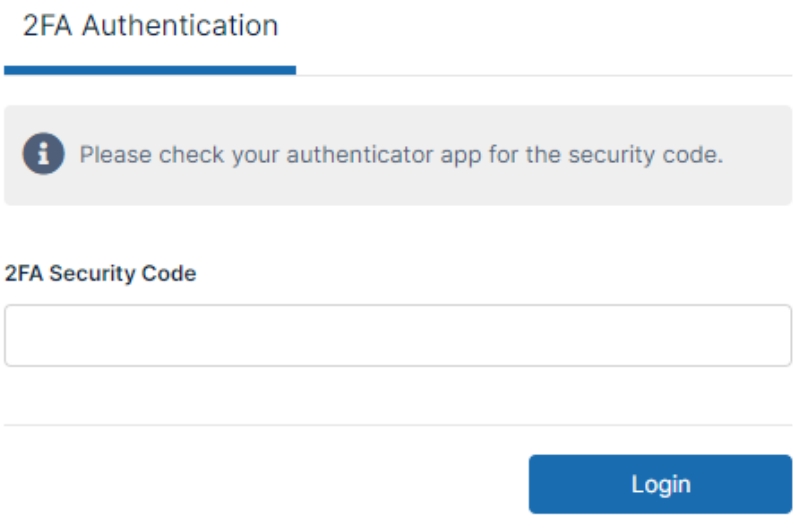


2. If an authenticator app is not yet set up, install it on your mobile device; you may click one of the download icons to install it.
3. Either scan the QR code or type the text code into the authenticator app.
   The authenticator app creates the account and lists it with a code.
4. Enter the code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

After your first login with TOTP

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

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

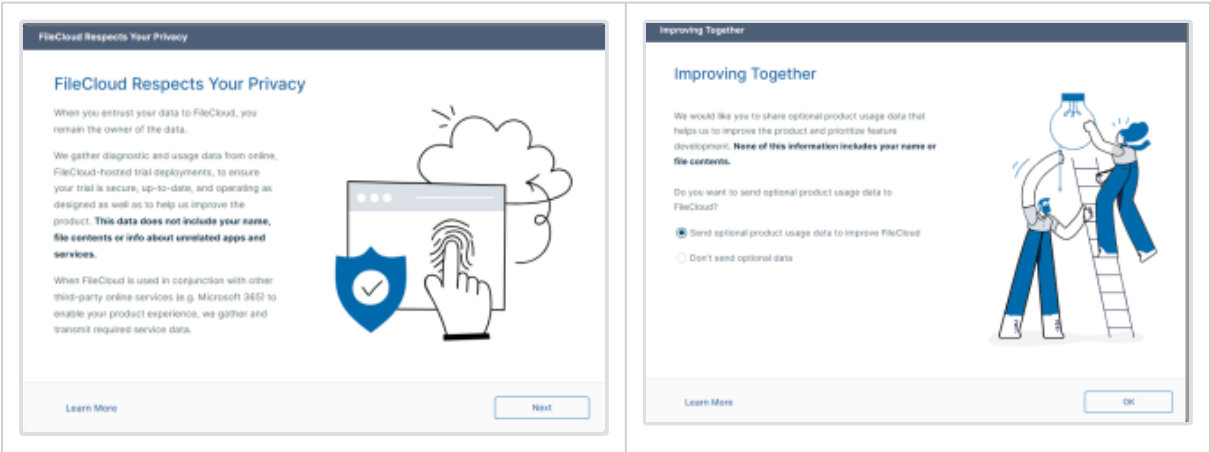


2. Enter the code listed on the authenticator app for your account into **2FA Security Code**, and click **Login**.
   You are logged in to FileCloud.

Collection of usage data

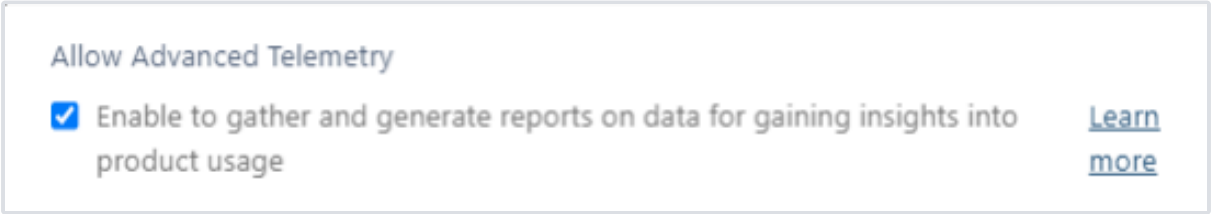
If you are logging in to a trial version of FileCloud Online for the first time, after you log in, the following screen appears to inform you that diagnostic and usage data is being collected from your online trial:

Once you convert from an online trial license to an online product license, the first time you log in to the admin portal a wizard opens with the following two screens:



To allow sending of optional product usage data to FileCloud, leave **Send optional product usage data to improve FileCloud** selected, and click **OK**.
To prevent sending of optional product usage data to FileCloud, select **Don't send optional data**, and click **OK**.

You can change the option at any time by going to **Settings > Server** and checking or unchecking **Allow Advanced Telemetry**.



Customizing the Login Page

To customize the image on the admin login screen, see Themes, Labels, and Logos.
You can add additional Administrator accounts.

Managing Admin Users

Manage FileCloud Online Users

Adding a user allows an employee in your company access to the FileCloud Online site so they can share and sync files.

As an administrator, you can control:

- how the user authenticates when logging in
- what access level the user has
- assign a new username and password or use an existing AD/LDAP account

This level of control allows you to manage data in many different situations; for example, when an employee leaves the organization. The data can continue to be saved for a disabled user account while not allowing that user to log in to FileCloud Online anymore. Then later this saved data can be made available to a new employee.

Administrators can create users in the following ways:

Manually Add a User

Import a User from Active Directory or LDAP

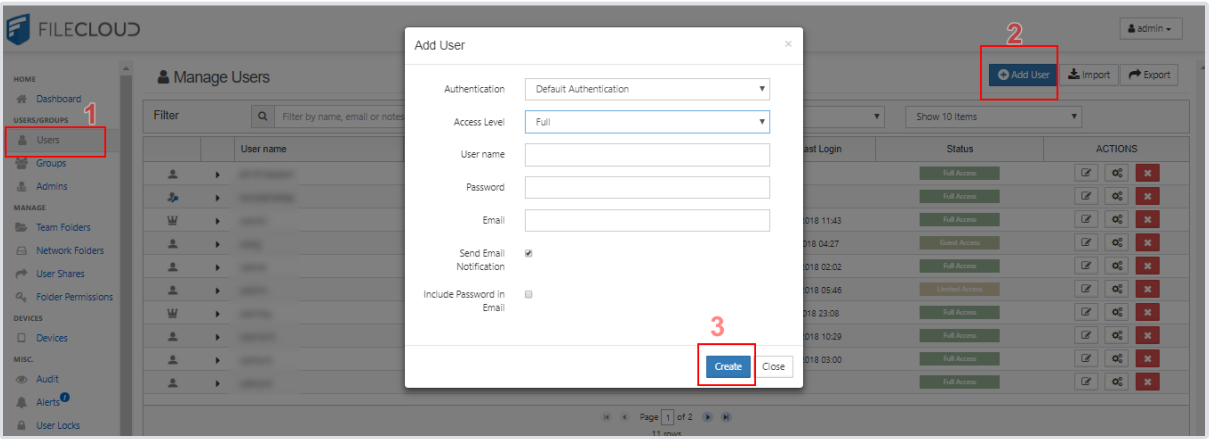
Bulk creation of User Accounts from a CSV File

You can also create user groups for easy sharing.

Manually Add FileCloud Online Users

Adding a user manually allows you to set specific attributes per user as you create them one at a time.

Figure 1. Manually Adding a User



To manually add a new user:

1. Log in to the admin portal.
2. From the left navigation panel, under *Users/Groups*, click ***Users***.
3. On the right side of the *Manage Users* page, click the *Add User* button.
4. In the Add User window, in Authentication, select one of the following methods:
   Default authentication - you want to create a user by assigning a unique User name, Password, Email address
   AD or LDAP - you want to import an existing user's information from your AD or LDAP environment. This allows the user to log in to FileCloud Online like they would for any other resource in your company's network.
5. In the Add User window, in Access Level, select one of the following settings:

Access Level	User Log In	Account Exists	File Storage	Counted in the License
Disabled	✗	:white-check-mark:	:white-check-mark:	✗
Guest	• Web portal • Client application	:white-check-mark:	✗	:white-check-mark:

Access Level	User Log In	Account Exists	File Storage	Counted in the License
External	• Web portal Only	:white-check-mark:	✗	✗
Full	• Web portal • Client application	:white-check-mark:	:white-check-mark:	:white-check-mark:

6. In the **Add User** window, in **User name,** type in a unique user name.
7. In the **Add User** window, in **Password**, enter a password containing at least 8 characters.
8. In the **Add User** window, in **Email**, type in the user's email address.
9. In the **Add User** window, if you want to automatically send a Welcome email to the new user's email address, select **Email Notification**. This option includes sending the user name but not the password.
10. In the **Add User** window, if you want to automatically send a Welcome email to the new user's email address with the new user name and password, select **Include Password in Email**.
11. In the **Add User** window, click **Create**.

Manage FileCloud Online Folders

Team Folders are an easy way to share files among a team.

Administrator	Team Folders use managed storage and are not available for network storage. Therefore, team folders are created on managed storage where all files and folders under team folders are stored. • **Centralized Content Management**: Team Folders facilitate organizing files and folders in a centralized place. • **Easy Provisioning of Users, Files and Folders**: New users can be provisioned quickly with access to specific files and folders through team folders. • Similarly, New files can be granted immediate access to all relevant users by uploading the file to the relevant team folder. • **Granular Control of Folders:** Team Folders and their subfolders can be given granular permissions to users with Read, Write, Share and Sync access. • **Manage Selective Sync:** Admins can select specific team folders and enable or disable sync permissions on an easy-to-use user interface.

Set up Team Folders	1. Configure the Team Folder Account. 2. Seed and Organize Team Folder Data 3. Share Team Folder and Set Share Permissions for users and groups. 4. Setting Folder-Level Permissions on Team Folders

Manage FileCloud Online Security

Security means not only verifying the identity of someone who connects to a network resource, but also setting alerts to know when there are problems and setting permissions on folders shared on the cloud.

To manage security, choose how you want to secure your resources:

Enable Single Sign-On

- FileCloud supports SAML (Security Assertion Markup Language) based web browser Single Sign On (SSO) service.
- SSO provides full control over the authorization and authentication of hosted user accounts that can access FileCloud web-based interface.

Enable Multi-Factor Authentication

- Multi-Factor Authentication (MFA) refers to the multiple-step verification process that is available in FileCloud.
- This verification is designed to provide an extra layer of security.

Enable reCaptcha Integration

- Protect your system from robots by requiring proof that users are human when they log in to the system and access password-protected shares.

View Alerts

- Allow FileCloud to track all unhandled exceptions, system error messages generated in the FileCloud server.
- The number of alerts is shown in the Dashboard and the Alerts page
- The alerts will show detailed information about the various errors encountered.

Send Email Alerts

- You can also set alerts to send notification on specific user actions or system status.

Manage Folder Level Permissions

- In many sharing scenarios, you might need to set up folder permissions so that even if a top level folder allows some actions, a specific subfolder does not.

Customize Your FileCloud Online Site

Although your FileCloud site is hosted by FileCloud, you have customization options.

Add Your Own Logo

- Choose the image that will be displayed to all users on the user portal.
- Choose the image that will be displayed on the top left in Mobile Apps when a user is logged in.
- Choose the icon that will be used to represent your FileCloud site.

Customize the Background

- Choose the image that will be used as the background for the user portal Login page.

Customize the User Portal Interface

- Enable or disable the ability for a user to customize the user portal
- Show supported documents as a PDF preview in the user portal
- If your users frequently share PDF files, you can enable an option to open the file share in a full preview mode
  This is useful when sharing PDF files.
- Allow users to create new Office documents
- Show or disable the Music Player in the user portal
- Show or disable the news feed in the user portal
- Disable the user's ability to download full folders or multiple items as zip files
- Enable or disable the getting started walkthrough which a new user sees when they log in for the first time

Customize a User's Login Experience

- Customize user options
- Customize the login experience

- Add links to the Account menu
- Customize how files are listed

Customize Styles

- Customize any element of the user portal's interface

Customize Email Messages

- Overriding the default email messages that are provided

FileCloud Online User Tasks

Follow the steps in this guide to start sharing and syncing your files through the FileCloud Online service.

What Can Users Do with the FileCloud Site?

After your Administrator has configured the site and created your account, you are ready to start using the site in the following ways:

Learn more about FileCloud...	User Account Types
Log In to the User Portal...	Accessing FileCloud
View files and manage files from...	Web Browser (User Portal) FileCloud Desktop for macOS FileCloud Desktop for Windows FileCloud Sync FileCloud Drive Mobile Devices
Share my files...	Sharing Files and Folders

Access my FileCloud documents from Microsoft apps...	Integration with Microsoft