

**FileCloud Online**  
**Version 23.261**  
**FileCloud Site Maintenance**

16 April, 2026

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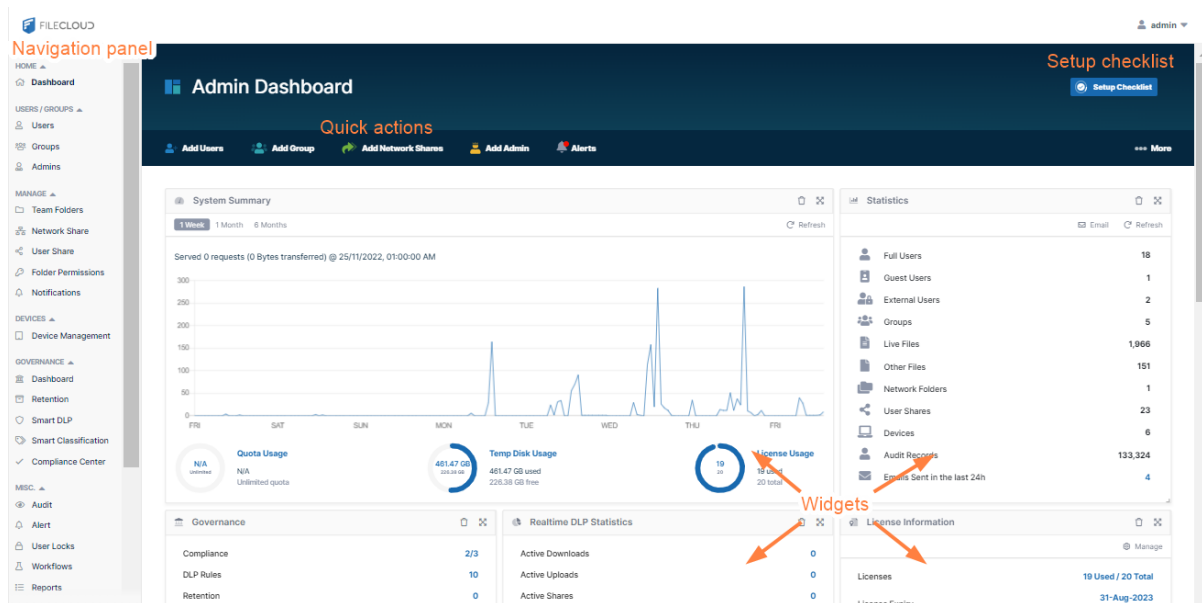
This section shows you how to monitor and maintain your FileCloud site, as well as how to edit and update its features and options.

# Admin Portal Dashboard

The Admin dashboard, which is the first page you see when you log into FileCloud, is a Web console that provides a monitoring interface for your site.

💡 The Admin dashboard displays several areas to help you manage your site.

- **Navigation pane** - The left pane includes a menu that allows you to access other screens where you configure site settings. It appears on all screens in the Admin portal.
- **Setup Checklist** - This button opens a manually updatable checklist of the tasks generally required for setting up FileCloud.
- **Quick actions** - The ribbon near the top of the dashboard displays links to common actions such as adding a user and managing alerts.
- **Dashboard widgets** - The widgets on the dashboard allow you to see at a glance how your site is performing. Note: If you do not have access to a dashboard widget or its contents, it does not appear on your dashboard.



## Setup Checklist

The **Setup Checklist** includes the tasks that are generally required for setting up FileCloud. Click the button in the header of the page to open the checklist.



The **Setup Checklist** includes various tasks generally necessary for setting up FileCloud, although some tasks may not apply to you.

The tasks **Basic Installation Completed** and **Setup Cron Job** are automatically checked/unchecked for you, and you cannot modify them. All of the other tasks are not checked automatically, and you may check them manually to keep track of what you have completed.

Setup Checklist
✕

### Basic

- Basic Installation Completed
- Setup 'My Files' Storage (Local or S3 or OpenStack)
- Setup Email Configuration

### Authentication

- Configure How Users are Authenticated (Local or AD or LDAP)
- Configure New Account Signup Policy
- Configure New Account Approval Policies

### Network Shares

- Enable or Disable Network Folder Access
- Enable or Disable offline Sync of Network Folders
- Setup NTFS Helper Service (for NTFS file permissions)

### Sync and Backup

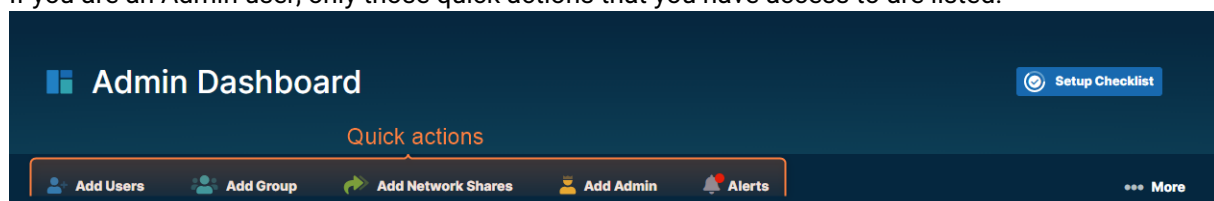
Save

Close

## Quick Actions

Links for quick actions are listed in a ribbon near the top of the page. They take you to the screen in the Admin portal for the action, for example, the **Add Users** link takes you to the **Manage Users** screen. The **Alerts** link takes you to the **Manage Alerts** screen. It displays a red dot if there are alerts listed on the **Manage Alerts** screen. You must clear all alerts from this screen to remove the red dot from the **Alerts** link.

If you are an Admin user, only those quick actions that you have access to are listed.



For help performing the quick actions, see:

- Add a user
- Add a group
- Add Network Shares
- [Add Admin](#)
- [Alerts](#)

## Dashboard Widgets

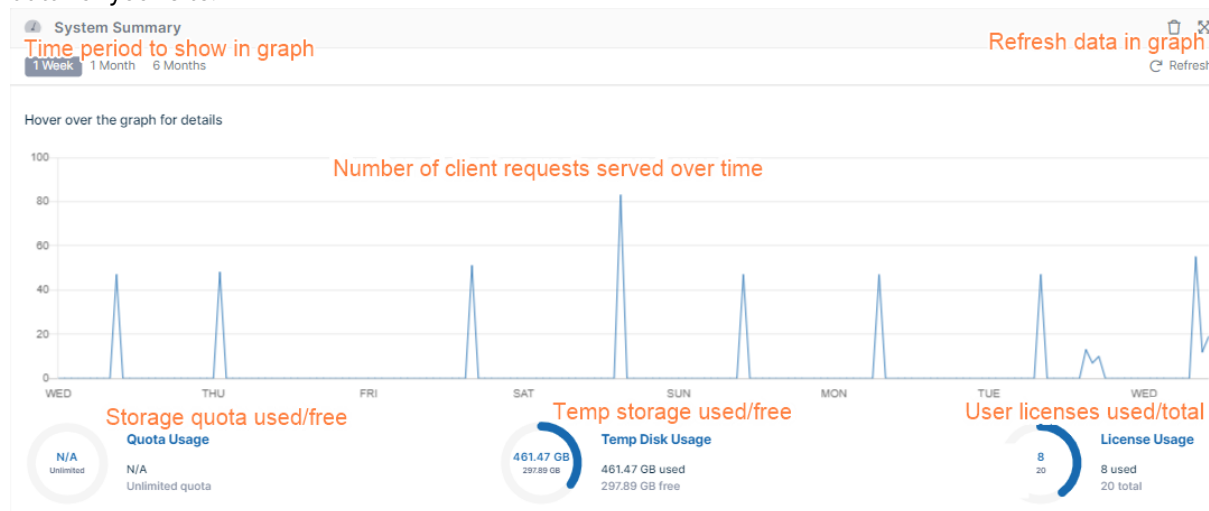
The FileCloud dashboard has widgets that display real-time information. If you are an Admin user, only those widgets involving actions you have access to are listed.

- Each widget accesses a particular set of data or performs a particular function and presents its information.
- Widgets allow you to visualize operational data with rich visualizations and fast performance.
- Widgets have menus or actions that allow you to access and manage the data quickly.
- Widgets can be rearranged on the screen, as well as removed and restored.

## Widget descriptions

### System Summary

This **System Summary** widget allows you to analyze overall site performance by visualizing relevant data for your site.



### Statistics

This **Statistics** widget displays general statistics about your system:

Statistics		🗑️	🔄
		✉️ Email	🔄 Refresh
👤	Full Users		18
👤	Guest Users		1
👤	External Users		2
👤	Groups		5
📄	Live Files		1,966
📄	Other Files		151
📁	Network Folders		1
🔗	User Shares		23
💻	Devices		6
👤	Audit Records		133,324
✉️	Emails Sent in the last 24h		4




Icon	Function
✉️	Sends an Admin Summary email to the admin. By default, an Admin Summary email is sent to the admin every 24 hours. Click number to view report.
🔄	Refreshes the statistics.

Statistic	Description
Full / Guest / External Users	Number of full users, guest users, and external users.
Groups	Number of groups.
Live Files	Number of files stored locally by all users combined that users can access directly from FileCloud folders.
Other Files	Other files are additional versions of Live files that users access from the Previous Version option for a file.
Network Folders	Number of Network folders.

Statistic	Description
User Shares	Number of shares by each user. A share is counted each time a different user shares it, but only once per time shared, even if it is shared with multiple users.
Devices	Number of clients (other than the Web server) that use your system, such as FileCloud Drive, FileCloud Sync, MS Office plugin, MS Outlook plugin, mobile applications, ServerSync, and ServerLink.
Audit Records	Number of audit records in the entire system.
Emails Sent in the last 24h	Number of emails sent in your system in the last 24 hours. Click the number to view a report.

### Governance

The Governance widget displays counts of your compliance configurations, DLP rules, retention policies and content classification rules. Each count is a link to the screen for configuring the feature.

 Governance <span style="float: right;">   </span>	
Compliance	<b>3/3</b>
DLP Rules	<b>10</b>
Retention	<b>0</b>
Content Classification	<b>0</b>

### Realtime DLP Statistics

This widget displays DLP statistics from the last 7 days, and displays reports of Active Downloads, Active Uploads, Active Shares, and Active Users when you click the number on the right. When you click the number to the right of Violations, the Manage DLP Rules page opens.

Realtime DLP Statistics	
Active Downloads	0
Active Uploads	0
Active Shares	0
Active Users	2
Violations	0

### License Information

This widget shows you basic information about your license.

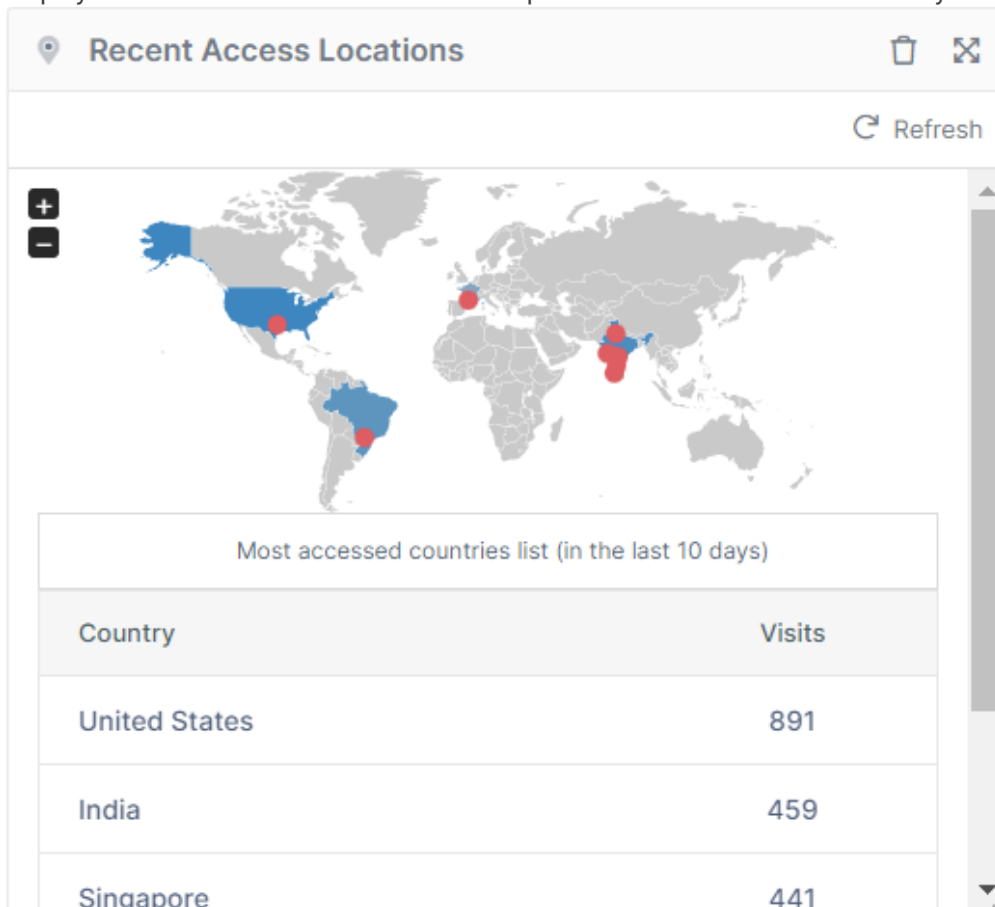
License Information	
<a href="#">Manage</a>	
Licenses	15 Used / 500 Total
License Expiry	30-Aug-2022 (236 days left)
License Owner	CodeLathe Technologies Inc

In the upper-right corner of the widget, click **Manage** to go to the License settings page. To update your license, see [Viewing Your License Details](#).

### Recent Access Locations

The **Recent Access Locations** report provides the total number of requests received from a geographical location. The countries that had any activities in the last 10 days are shown in blue color. The red points on the map indicate the cities. Moving the mouse over on the cities or countries

displays the total number of visits from that particular location in the last 10 days.




To refresh the report, in the upper-right corner of the **Statistics** widget, click refresh; then in the upper-right corner of the **Recent Access Locations** widget, click **Refresh**.

The **Recent Access Locations** report is not enabled by default.

**To enable the Recent Access Location report:**


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

the **Settings** navigation page, click **Admin**  .  
The **Admin** settings page opens.

2. Scroll down to **Show recent access locations in dashboard**, and set it to **True**.

Show recent access locations in dashboard

Display the recent access locations chart in the admin dashboard. Default equals false.

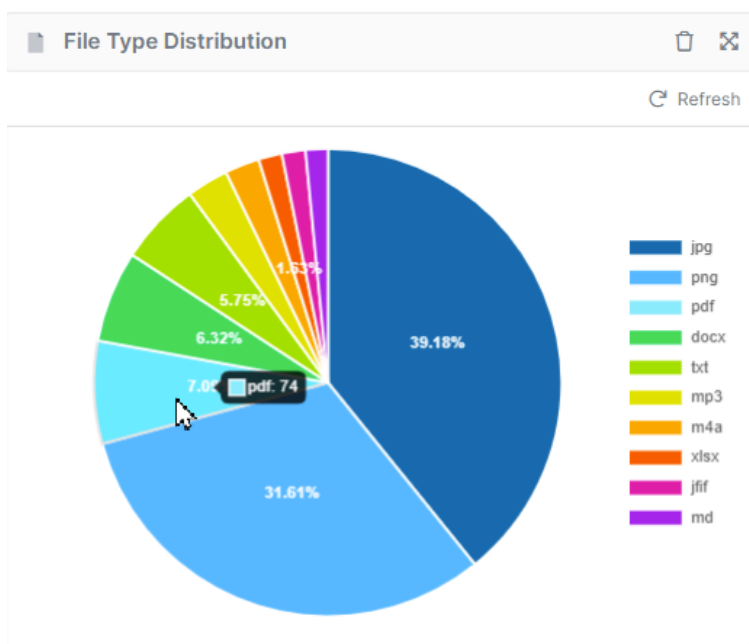
True 

Settings	Value
Show recent access location in dashboard	TRUE - Show the Geo IP Map with data FALSE - Hide the Geo IP Map from the dashboard DEFAULT - Show the Geo IP Map with no data.
Access locations Server URL	Server URL that converts the IP address to Geo Location Data. Default URL: <a href="http://geoiplookup.codelathe.com/geoip.php">http://geoiplookup.codelathe.com/geoip.php</a> To point this URL to a different location contact FileCloud support.
Recent access update frequency	The Frequency with which the GeoIP data is retrieved from the server. Default : 24.

NOTE: The **Recent Access Locations** map and report displays with proper data only when a Cron job is set up and running and the access IP address recorded in audit is an external IP.

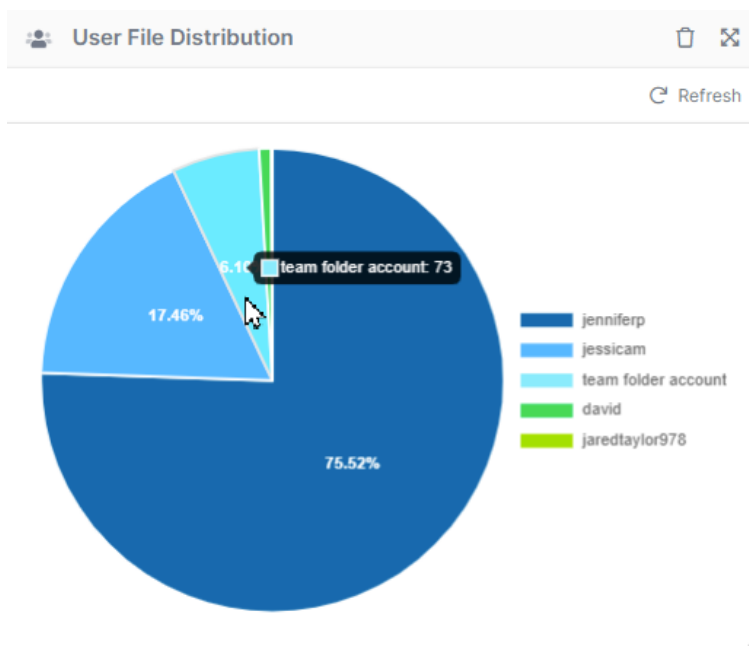
### File Type Distribution

The File type distribution report displays the percentage of files that are stored in the FileCloud by file type extensions such as .PDF, .DOCX etc. Hover your cursor over a section of the chart to view the number of files of that type.



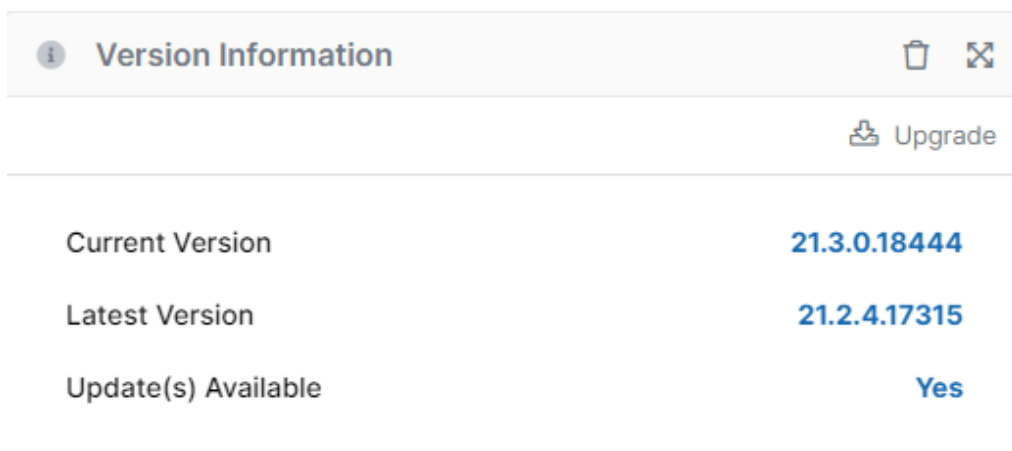
### User File Distribution

The user file distribution report displays the total number of files that are stored in FileCloud by specific users in percentage. Hover your cursor over a segment of the chart to see the number of files the user is storing.



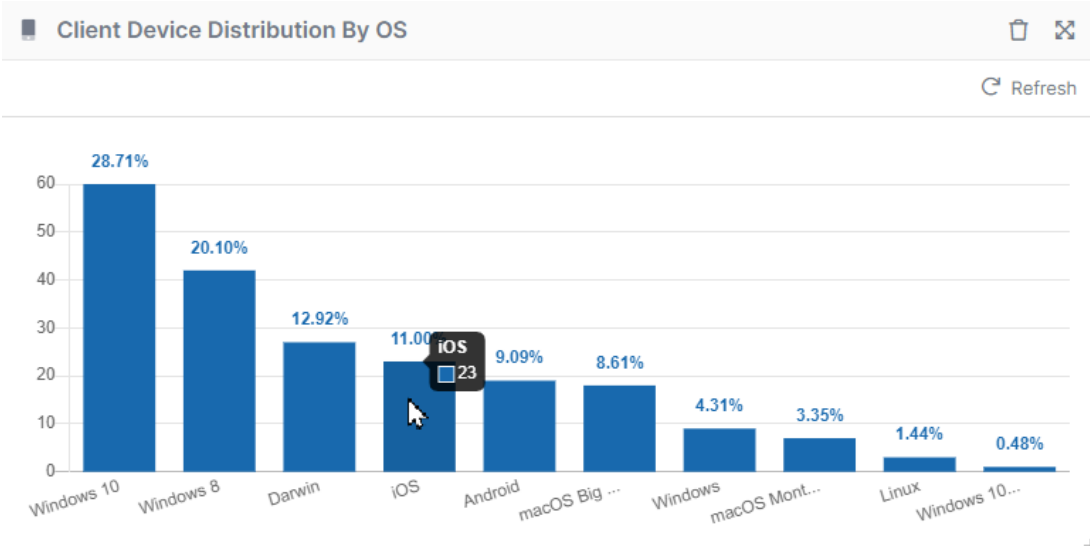
### Version Information

The Version Information widget displays your currently installed version and the latest available version of the system. If there is a new version available, the **Update(s) Available** button displays **Yes**.



### Client Device Distribution by OS

The client device distribution graph displays the total number of devices that are used to connect to FileCloud by OS type such as Windows, iOS, and Android. Hover over a bar to see the number of devices.



### Users with Lowest Quota Remaining

The **Users with Lowest Quota Remaining** widget displays the 10 users who have used the most disk quota. Hover your cursor over the icon in **% Used** to see the percent. The widget also gives the total files and the quota assigned for the user.

Please note that file count and size includes files in the user’s deleted folder.

% Used	User name	File Count	Quota Used	Quota Assigned
	jenniferp	905	1.13 GB	2 GB
	jessicam	209	495.97 MB	2 GB
	team folder account	73	101.53 MB	0 B
	edaylor978	1	523 KB	2 GB
0.02% of allocated quota used	david	10	516 KB	2 GB

## Rearranging and resetting widgets

To move a widget to a different location on the dashboard, click and hold the cross-arrow icon in the upper-right corner of the widget and drag and drop it to the new location.

**Admin Dashboard** Setup Checklist

Add Users Add Group Add Network Shares Add Admin Alerts More

### System Summary

1 Week 1 Month 6 Months Refresh

Hover over the graph for details

250  
200  
150  
100  
50  
0

THU FRI SAT SUN MON TUE WED THU

Quota Usage: N/A (Unlimited) / N/A (Unlimited quota)

Temp Disk Usage: 461.47 GB used / 292.55 GB free

License Usage: 8 used / 20 total

### Statistics

Email Refresh

Full Users	8
Guest Users	0
Limited Users	1
Groups	8
Live Files	996
Other Files	184
Network Folders	1
User Shares	43
Devices	6
Audit Records	49,046
Emails Sent in the last 24h	0

### Governance

Compliance: 3/3

### Realtime DLP Statistics

Active Downloads: 0

### License Information

Manage

To move all widgets back to their original configuration, click **More** in the header ribbon and choose **Reset Widgets**.

**Admin Dashboard** Setup Checklist

Add Users Add Group Add Network Shares Add Admin Alerts More

### Governance

Compliance: 3/3

DLP Rules: 10

Retention: 0

Content Classification: 0

### Realtime DLP Statistics

Active Downloads: 0

Active Uploads: 0

Active Shares: 0

Active Users: 2

Violations: 0

### Statistics

Email Refresh

Full Users	8
Guest Users	0
Limited Users	1
Groups	8
Live Files	996
Other Files	184
Network Folders	1
User Shares	43
Devices	6
Audit Records	49,539
Emails Sent in the last 24h	0

### System Summary

1 Week 1 Month 6 Months Refresh

Hover over the graph for details

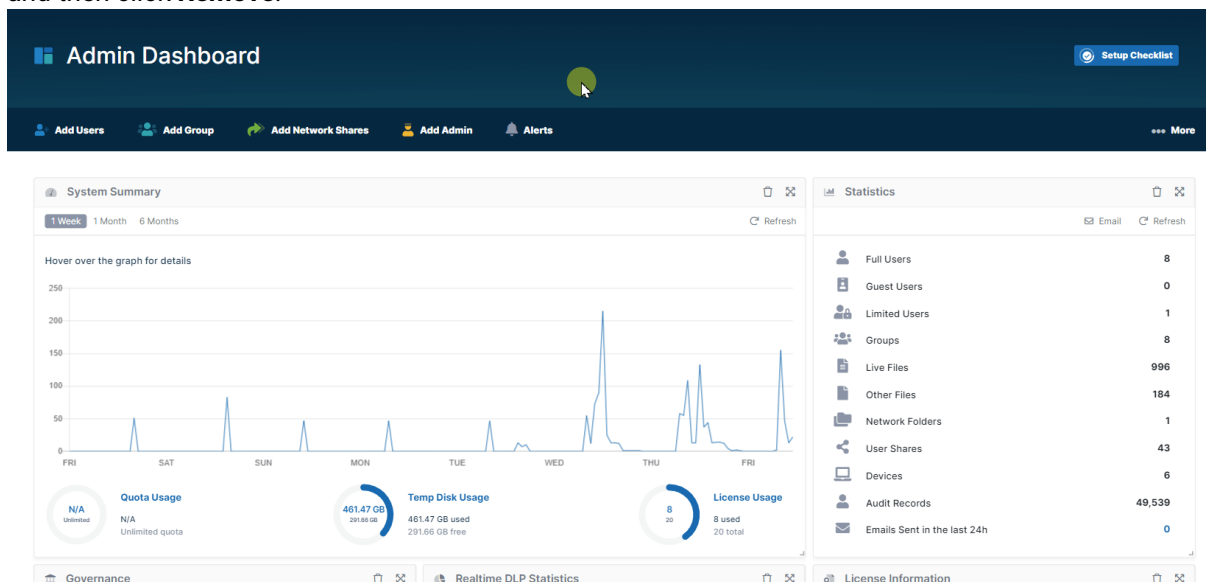
250  
200  
150  
100

### License Information

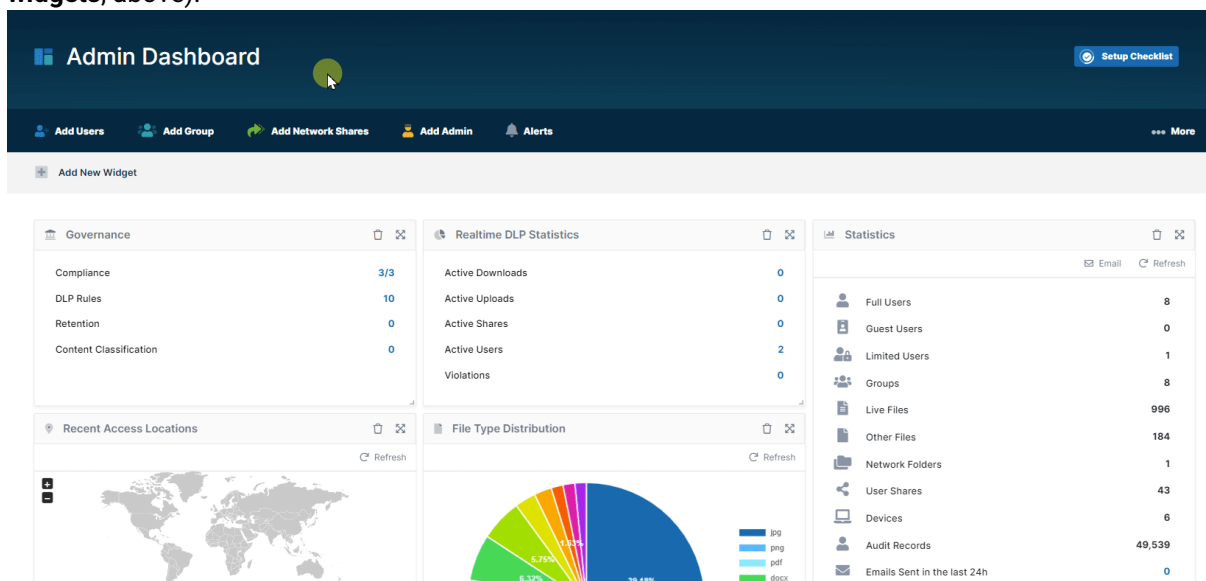
Manage

## Removing and Restoring Widgets

To remove a widget from the dashboard, click the delete icon in the upper-right corner of the widget, and then click **Remove**.



To restore a widget that has been removed, in the upper-left of the screen, click **Add New Widget**, then click the widget to restore, and click **Add**. It is added to the bottom of the screen. To move widgets back to their original positions, click **More**, and choose **Reset Widgets** (see **Rearranging and resetting widgets**, above).



## Release Notifications

You can learn about new FileCloud releases:

### By Subscribing to the Mailing List

When you register with CodeLathe, you will automatically be added to the FileCloud Mailing List.

If you are not receiving FileCloud emails, you can [Subscribe to the FileCloud Mailing List](#).

# Managing Users

**i** The ability to update and remove a user's profile picture is available in FileCloud Server version 18.2 and later.

## In this section:

To add FileCloud users, see Create FileCloud Users.

## Listing FileCloud Users

### Listing Users

To list all users in FileCloud:

1. Log on to Administration Portal.
2. Click on **User** on the left navigation panel to list all users.
3. To find users:
  - by name or email,, use the **Filter by name, email or notes** box.
  - by status, use the **Status Filter** box.
  - by source, use the **Source Filter** box. Options are:
    - **All** - Default. Users in both of the following categories.
    - **DEFAULT** - Users created internally in FileCloud.
    - **SSO** - Users created externally using SSO.

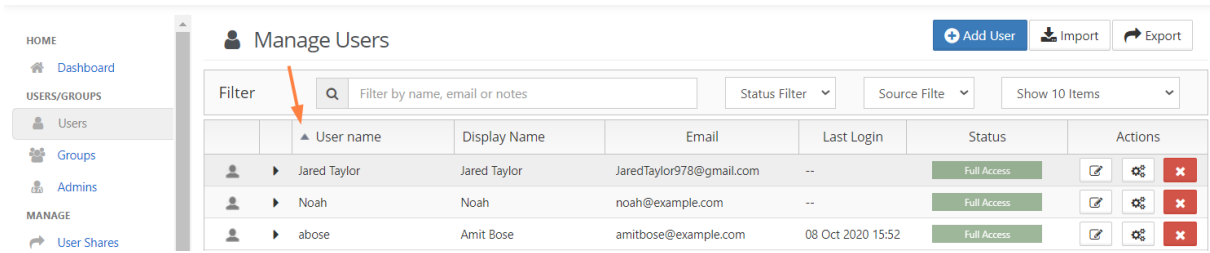
	User name	Display Name	Email	Last Login	Status	Actions
	Jared Taylor	Jared Taylor	JaredTaylor978@gmail.com	--	Full Access	[Edit] [Refresh] [Delete]
	Noah	Noah	noah@example.com	--	Full Access	[Edit] [Refresh] [Delete]
	abose	Amit Bose	amitbose@example.com	08 Oct 2020 15:52	Full Access	[Edit] [Refresh] [Delete]

### Sorting the User List

To sort the user list, click on the column name. The list is sorted on that column, and an arrow indicating the direction of sort appears in the column header.

For example, the following screenshot shows the user list sorted by ascending user names.

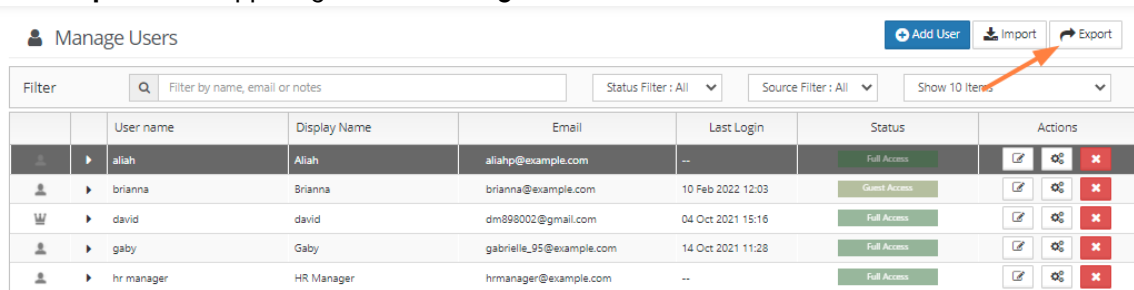
Notice that by default, all upper-case letters precede lower-case letters in alphabetical order.



## Exporting a list of users

To export a list of FileCloud users:


1. In the navigation pane, click **Users**.
2. Click **Export** in the upper-right of the **Manage Users** screen.



A csv file of users displaying the following fields is exported:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	UserName	EmailID	Password	DisplayName	Status	ExpirationDate	Groups	EmailVerified	DisableNotifications	LastLogin	Authentication Type	MobilePhone	Effective Policy	
2	david	dm898002@example.com		david	FULL		EVERYONE	YES	NO	10/4/2021 15:16	Default	15559992323	Group Management	
3	aliah	aliahp@example.com		Aliah	FULL		EVERYONE	YES	NO		Default	15556667777	Global Default Policy	
4	hr manager	hrmanager@example.com		HR Manager	FULL		EVERYONE	YES	NO		Default		Global Default Policy	
5	gaby	gabrielle_95@example.com		Gaby	FULL		EVERYONE	YES	NO	10/14/2021 11:28	Default		Global Default Policy	

## Viewing User Properties

 The ability to update and remove a user's profile picture is available in FileCloud Server version 18.2 and later.

As a FileCloud administrator, you can see user properties and change them as needed.

**To see a user's details and what they have permission to do:**

1. Open a browser and log on to the admin portal.
2. From the left navigation panel, click **Users**.
3. In the users list, click on the row of the user you want whose details you want to view.
4. Click the **edit icon**.

Show me

Manage Users

Filter: gmail.com

	User name	Display Name	Email	Last Login	Status	Actions
▶	david	david	dm898002@gmail.com	28 Apr 2021 08:20	Full Access	[edit] [refresh] [delete]
▶	jaredtaylor978	Jared	jaredtaylor978@gmail.com	--	Full Access	[edit] [refresh] [delete]
▶	jessicam	Jessica	jm2344311@gmail.com	16 Jun 2021 13:51	Full Access	[edit] [refresh] [delete]

Click to view and edit user details.

The **User Details** window opens showing you which user attributes you can set.

Click on the section of the **User Details** window below to learn more about an option.

User Details

Name	jessicam	Total Quota	2 GB
Email	[blurred]	Used Quota	576.7 MB
Last Login	02 Aug 2022 08:01 [refresh]	Available Quota	1.4 GB
TOS Date	02 Aug 2022 09:01	Used Storage	576.7 MB
Group	<a href="#">Manage</a>		<a href="#">More</a>

Manage Files   Manage Policy   Manage Shares   Mobile Devices   Reset Password   Send Email   Manage Notifications   Manage Backups   Delete Account

Profile Image

Update   Remove

Access Level: Full

Authentication: Default

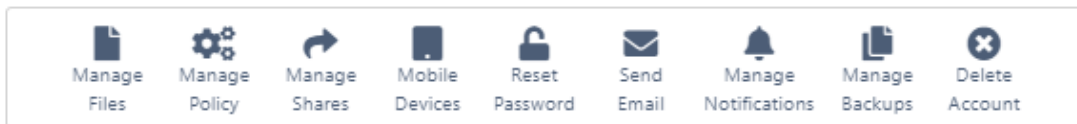
Save   Close

## User Properties - Advanced Options

"As a FileCloud administrator, you can see user properties and change them as needed.

To see a user's details and what they have permission to do:

1. Open a browser and log on to the admin portal.
2. From the left navigation panel, click **Users**.
3. In the users list, click on the row of the user whose details you want to view.
4. Click the **edit icon**.

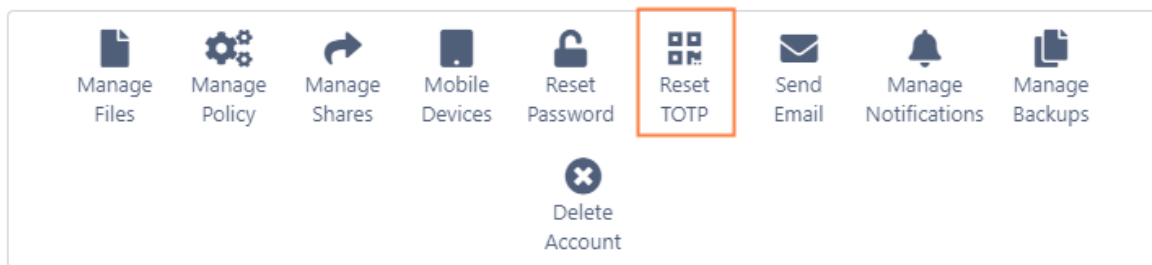


Options	Description	For more information
<b>Manage Files</b>	Manage the files that are stored on your FileCloud Server site. This allows you to protect and maintain your system in the following ways: <ul style="list-style-type: none"> <li>• Remove user files infected with a virus</li> <li>• Remove files belonging to a user that no longer has an account</li> <li>• Move folders for teams</li> <li>• Download, copy and move files at a user's request</li> <li>• Manage your storage space limits by moving or deleting files</li> <li>• Copy and move files and folders between two FileCloud users</li> </ul>	<a href="#">Managing User Files and Folders</a>
<b>Manage Policy</b>	Manage client policy for this user (overrides global values)	
<b>Manage Shares</b>	View, modify or remove shares created by users with a FileCloud account and appropriate permissions.	<a href="#">Managing User Shares</a>
<b>Mobile Devices</b>	Manage clients connecting to your FileCloud instance. This feature is called Remote Client Management (RCM) or Data Leak Prevention Control (DLPC)	<a href="#">Managing Client Devices</a>
<b>Reset Password</b>	Reset the password for user accounts with Authentication Type set to Default. For user accounts with an Authentication Type set to AD or LDAP, the password management must be done in AD or LDAP admin portal.	<a href="#">Reset a User Password</a>
<b>Send Email</b>	If the user does not have an AD account, this option either sends a forgot email message with the password newly generated by <b>Reset Password</b> or an account welcome message with an automatically generated new password.  If the user has an AD account, there is no option to send a forgot email message. Clicking OK sends the user a welcome email without a new password.  The option to send an account welcome message for accounts other than AD users is available beginning in FileCloud 20.1 The option to send an account welcome message to AD users is available beginning in FileCloud 20.3	<a href="#">Send Email</a>
<b>Manage Notifications</b>	Edit notifications configured on the user's file and folder paths.	<a href="#">Editing individual user's file and folder notifications</a>
<b>Manage Backups</b>	Manage backups for the user.	


Options	Description	For more information
<b>Delete Account</b>	Delete this user account from the command line or the admin portal.	<a href="#">Deleting a FileCloud User</a>

## The Reset TOTP button

A **Reset TOTP** button is included for admin users if a setting is included to configure their 2FA to use the admin configuration if the admin 2FA delivery method is TOTP. When the setting is included, the admin users' TOTP authorization cannot be reset by the given methods for users and the main admin, and must be reset using this button. For more information about the setting, see Two-Factor Authentication for Admin Portal.



## User Properties - Editable


 The ability to update and remove a user's profile picture is available in FileCloud Server version 18.2 and later.



As a FileCloud administrator, you can see user properties and change them as needed.

### To see a user's details and what they have permission to do:

1. Open a browser and log on to Admin Portal.
2. From the left navigation panel, click **Users**.
3. In the users list, click on the row of the user you want whose details you want to view.
4. Click the **edit icon**.

Profile Image



 Update
 Remove

Access Level

Authentication

Email


Save
Close

After you make any changes and save them, the new property will be in effect immediately.

For example, after an administrator increases the storage quota for an account, the increased storage is available to the user as soon as the administrator clicks Save.

Editable Property	Description
<b>Profile Image</b>	<p>You can choose a new picture or remove the current one.</p> <ul style="list-style-type: none"> <li>This is useful for IT Managers who also manage user images in Active Directory.</li> <li>If no profile image is chosen, the default shown in the User Details panel is used by default.</li> </ul>
<b>Access Level</b>	<p>This is the access level set for this user. The possible values are:</p> <ul style="list-style-type: none"> <li><b>Full Access</b></li> <li><b>Guest Access</b></li> <li><b>External Access</b></li> <li><b>Enabled</b></li> <li><b>Disabled</b></li> </ul> <p>Only accounts with enabled status can login into their account irrespective of their access level.</p> <p>Disabled accounts do not count towards the License Limit.</p> <p>For more information: User Access Levels</p>

Editable Property	Description
<b>Authentication</b>	<p>This is the type of authentication used to verify the user's account.</p> <p>The possible values are:</p> <p><b>Default</b></p> <p><b>External (AD/LDAP)</b></p> <p>For more information: Authentication</p>
<b>Total Quota (GB)</b>	<p>Field to set the total storage quota for the user account. The value set must be in GB.. This value will override the global storage quota settings.</p>
<b>Email</b>	<p>Field to set the email ID for the user account. This value has to be unique for the FileCloud installation.</p>
<b>Secondary Email</b>	<p>Additional email account.</p>
<b>Display Name</b>	<p>Field to set an user readable name that will be used in various places such as email notifications etc.</p>
<b>Account Expires On</b>	<p>If this is date is set and the current date is past, the account will be disabled automatically and user cannot log into the system</p>
<b>Password Expires On</b>	<p>If "User Password Expires in Days" field in Password settings is configured, then any new account will have this value setup automatically and will require password change after the expiration date elapses. This value can be overridden by the administrator.</p> <p>NOTE: An automatic email notification is sent to the user 7 days and 1 day before the actual password expiry date.</p>
<b>Email Verified</b>	<p>Indicates if the entered email has been verified. If email is not verified, then account cannot be logged in until the verification is completed.</p>
<b>Disable Sync (Automatic Sync of My Files and Network Folders)</b>	<p>Allow or disable Automatic sync of "My Files" location and Network Folders Location</p>
<b>Disable Sync (Offline Network Share Sync)</b>	<p>Allow or disable offline access of network folders in FileCloud Sync</p>
<b>Backup Path</b>	<p>Allows override of the backup folder that the user can backup files and folders using the sync app or the media files from mobile apps</p>

Editable Property	Description
<b>Change Password on Login</b>	<p>Forces the user to change the login password on first login to the user portal.</p>  <p>Note: This does not appear when the following setting, <b>Creation Source</b>, is set to <b>SSO</b>.</p>
<b>Creation Source</b>	<p>Where user was created. Options are:</p> <ul style="list-style-type: none"> <li>• Default (Admin user interface or import)</li> <li>• SSO (During SSO sign in) - When this is selected, the above setting, <b>Change Password on Login</b> is not applicable and does not appear.</li> </ul>
<b>Phone Number</b> (added in FileCloud 20.1)	<p>The user's phone number.</p>
<b>Notes</b>	<p>This field allows the user to enter notes for the user and also search the user based on notes.</p>

## User Properties - Read Only

As a FileCloud administrator, you can see user properties and change them as needed.

**To see a user's details and what they have permission to do:**

1. Open a browser and log on to the Admin Portal.
2. From the left navigation panel, click **Users**.
3. In the users list, click on the row of the user you want whose details you want to view.
4. Click the **edit icon**.

**User Details**
✕

Name	jessicam	Total Quota	2 GB
Email	[Redacted]	Used Quota	576.7 MB
Last Login	02 Aug 2022 08:01 <span style="float: right;">↺</span>	Available Quota	1.4 GB
TOS Date	02 Aug 2022 09:01	Used Storage	576.7 MB
Group	<a href="#" style="background-color: #0056b3; color: white; padding: 5px 10px; border-radius: 3px;">Manage</a>	<a href="#" style="background-color: #00a0e3; color: white; padding: 5px 10px; border-radius: 3px;">More ▾</a>	

Most of the User Properties in the top portion of the User Details dialog box are for display only and cannot be changed in this window.



In this section of the User Details, you can manage the groups that a User belongs to by clicking the Manage button.

See [Managing Groups](#)

The User's read-only properties are described in the following table.

Read only Property	Description
<b>Name</b>	The unique name of the user account.
<b>Email</b>	Email id associated with the account (Can be changed editing the " <b>Email</b> " text box).
<b>Last Login</b>	Last login attempted on this account. Click the Reset icon to set <b>Last Login</b> to null. <b>Note:</b> When a disabled user is re-enabled, Last Login is set to null.
<b>TOS Date</b>	Date that terms of service was approved on login. If not approved, <b>Not Accepted</b> appears.
<b>Group</b>	Click <b>Manage</b> to view, add, and remove the user's groups.
<b>Total Quota</b>	Quota allocated for this account (This can be changed using " <b>Total Quota (GB)</b> " text box)
<b>Used Quota</b>	This is the size of data this user has currently used. This includes all "Committed" Space by this user including file versions, files in recycle bin, partial files uploaded. Depending on the storage calculation setting, this quota might also include storage shared with this user by other users. For guest access users, this value calculated from the amount of data shared to that account.
<b>Available Quota</b>	Space available

Read only Property	Description
Used Storage	Space taken by all this user content. This includes space used for <b>multiple file versions, files in Recycle bin</b> contents and <b>Partial files in progress</b> .



#### Storage Details

Additional storage details about the files stored in the user account can be viewed by clicking on the "**More**" button found in the read only section of the user properties popup.

## Disable a FileCloud User Account

### Disabled User Account Status

Any user account can be disabled by the Administrator.

If a user account is disabled, then the following rules apply

	Description
Log in using user id from browser or other clients	Disallowed. User will see explicit message when attempting to log in
User files	Not deleted.
License count	Disabled users do not count towards consumed license count

### Disabling a User Account


Disable a user account by following the steps listed below

1. Log on to Administration Portal.
2. Click **Users** in the left navigation panel.
3. Click **Edit** in the user row.
4. Using the **Status** drop-down list, change the status to **Disabled**.

**User Details**

Name	aliah	Total Quota	2 GB
Email	aliahp@example.com	Used Quota	251 KB
Last Login	02 Dec 2022 08:50	Available Quota	2 GB
TOS Date	16 Sep 2022 09:53	Used Storage	251 KB
Group	<a href="#">Manage</a>		<a href="#">More -</a>

[Manage Files](#)
[Manage Policy](#)
[Manage Shares](#)
[Mobile Devices](#)
[Reset Password](#)
[Send Email](#)
[Notifications](#)
[Manage Backups](#)
[Delete Account](#)

Profile Image:  [Update](#) [Remove](#)

Access Level: [Full](#) [Disabled](#) [Guest](#) [Full](#) [External](#)

Authentication:

[Save](#) [Close](#)

5. Click **Save**.

## Import Disabled Users from Active Directory as Disabled

When a user account is disabled in AD, it may be imported as a disabled account into FileCloud.

### To use this option:

1. Open a browser and log on to the admin portal.
2. In the navigation panel, click **Groups**.
3. Select the **group** that you want to add users to, and then click the Edit icon.
4. On the **Members** tab, click **Import Users from AD Group**.
5. In **AD Group Name**, enter the AD group to import.

6. Enable the **Disable Members** option.

AD Group Members Import

AD Group Name:  Group List


---

Automatic Sync: ⓘ

---

Remove Members: ⓘ

---

Disable Members: ⓘ  

---

Send Email: ⓘ

Import
Close

If there are users with disabled accounts in the AD group, they are listed in the admin portal's **Manage Users** screen with **Disabled Access**.

## Deleting a FileCloud User

As an administrator, you can delete a FileCloud user account.



When a user account is deleted

- By default, the user's data stored in My Files is deleted.
- The user can no longer log in via browser or connect using the Sync client or Drive client.
- The user's license account is released, and the available license count is incremented by 1.
- The user is removed from all shares.
- The user's workflows are deleted.
- Data shared by the user is no longer be available.

Account Type	Effect
User with "Default Authentication" (Local User)	Local user account is deleted.
User with "AD or LDAP Authentication"	Only the FileCloud account will be deleted. No change will be done to the user in the AD or LDAP server.

**To move the user's data to a different user before deleting the account:**

Use the admin portal to [copy and move user files](#)

## To delete the user's account

[Delete the account](#)

## Deleting a FileCloud User From Admin Portal

To delete a user:

1. Open a browser and log on to Administration Portal.
2. From the left navigation panel, click **Users**.
3. Click the row containing the user to be deleted.
4. In the Actions column, click the delete icon (✖).
5. On the confirmation dialog, click the box next to "Confirm and continue with deletion?". Then click OK.

💡 It is also possible to delete an account using the [account properties](#) panel by clicking on the settings icon ⚙️.

	User name	Display Name	Email	Last Login	Status	Actions
	Jared Taylor	Jared Taylor	JaredTaylor978@gmail.com	--	Full Access	[Edit] [Settings] [Delete]
	Noah	Noah	noah@example.com	--	Full Access	[Edit] [Settings] [Delete]
	abose	Amit Bose	amitbose@example.com	08 Oct 2020 15:52	Full Access	[Edit] [Settings] [Delete]

Delete Jared Taylor

**Deleting user account will delete all user file(s) and folder(s).**

Confirm and continue with deletion?

Delete

Cancel

## Resetting a User Password

As a FileCloud Administrator, you can reset password for accounts with Authentication Type set to Default.



For user accounts with "Authentication Type" set to "AD or LDAP", password management must be done in AD or LDAP admin portal.  
Sending the Account Welcome email option is available beginning with FileCloud 20.1.


To reset password for user account:


1. Log on to Administration Portal.
2. Click on **"Users"** on left navigation panel.
3. Locate the user to reset the password using **"Filter Users"** or from the user list.
4. Click on **"Edit"** for the user row under the **"Actions"** column to launch the User Details window.


User Details
✕


---


Name	david	Total Quota	2 GB
Email	dm898002@gmail.com	Used Quota	0 B
Last Login	28 Apr 2021 08:20	Available Quota	2 GB
TOS Date	Not Accepted	Used Storage	0 B
Group	<a href="#">Manage</a>		<a href="#">More</a> ▼


  
 Manage Files


  
 Manage Policy


  
 Manage Shares


  
 Mobile Devices

  
 Reset Password


  
 Send Email



  
 Manage Notifications

  
 Manage Backups

  
 Delete Account

Profile Image



 Update
 Remove

Access Level ▼

Full

Authentication ▼

Default

Email ▼

dm898002@gmail.com

[Save](#)
[Close](#)

5. Click **Reset Password**.



The dialog box titled "Set New Password" has a close button (X) in the top right corner. It contains two input fields: "Password" and "Confirm Password". The "Password" field has a vertical line cursor inside. At the bottom right, there are two buttons: "Save" (blue) and "CANCEL" (white with grey border).

6. Enter the new password in **Password** and **Confirm Password**.

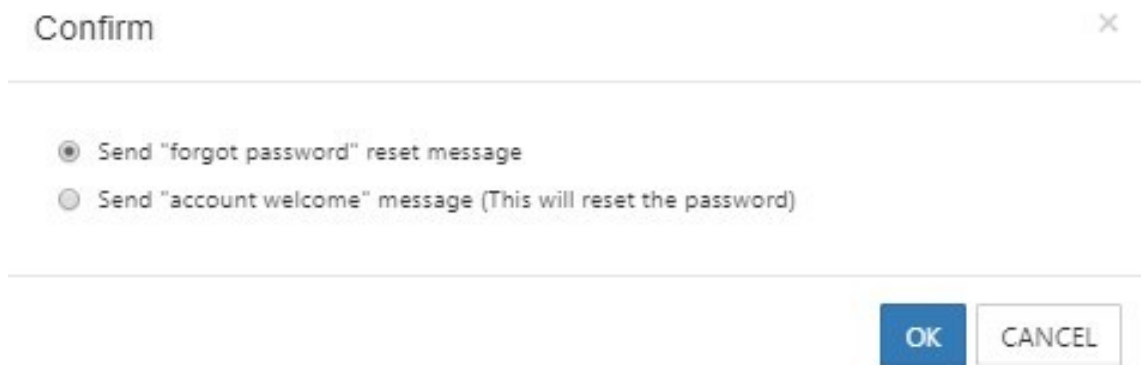
7. Click **Save**.

**Note:** If you want an email to be automatically sent to the user when you change their password, enable the **Send reset password email** setting in Password Settings and enter the text of the email.

OR

1. To change the password, and send the new password to the user, click **Send Email**.

The following dialog box opens:



The dialog box titled "Confirm" has a close button (X) in the top right corner. It contains two radio button options: "Send 'forgot password' reset message" (selected) and "Send 'account welcome' message (This will reset the password)". At the bottom right, there are two buttons: "OK" (blue) and "CANCEL" (white with grey border).

2. Choose **Send "forgot password" reset message**, and click **OK**.

The new password is sent to the user

## Manage A User's Policies

Administrators can manage users easily using policies.

- Policies provide a framework for managing settings at the user or group level
- One policy record manages multiple policy values

- The policy record can be associated with a user

Learn more about Policies

## What do you want to do?

### Select a Policy for a User

You can add a user to a policy to apply multiple settings at once and re-use settings for similar user scenarios.

For example, you can use a policy to set attributes for the following:

- Enable or Disable Printing in Mobile Apps
- Enable or Disable Configuration Changes in Clients
- Enable or Disable Two-Factor Authentication (2FA)
- Enable or Disable Notifications
- Enforce Session Timeout for Devices
- Set a Default Storage Quota
- Enable Privacy Settings

#### To select a policy for a user:

1. Open a browser and log on to the admin portal.
2. In the navigation panel, click **Users**.
3. In the **Manage Users** window, select a user, and then click the Edit icon.
4. In the **User Details** window, click **Manage Policy**.
5. Next to the **Selected Policy** box, click **Select**.
6. Choose a policy, and click **Select**.

#### Change or Remove a User's Policy

If you want to change a user's policy, you must remove the selected one first.

#### To remove a policy for a user:

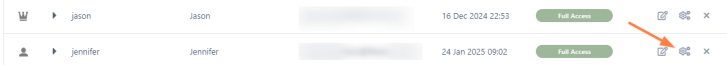
1. Open a browser and log on to the admin portal.
2. In the navigation panel, click **Users**.
3. In the **Manage Users** window, select a user, and then click the Edit icon.
4. In the **User Details** window, click **Manage Policy**.
5. Next to the **Selected Policy** box, click **Clear**.

#### Modifying a policy while managing a user

In the **Manage Users** page, in addition to viewing the details of the policy assigned to a user, you can edit the policy. However, if you edit the policy, the changes affect all users the policy is assigned to.

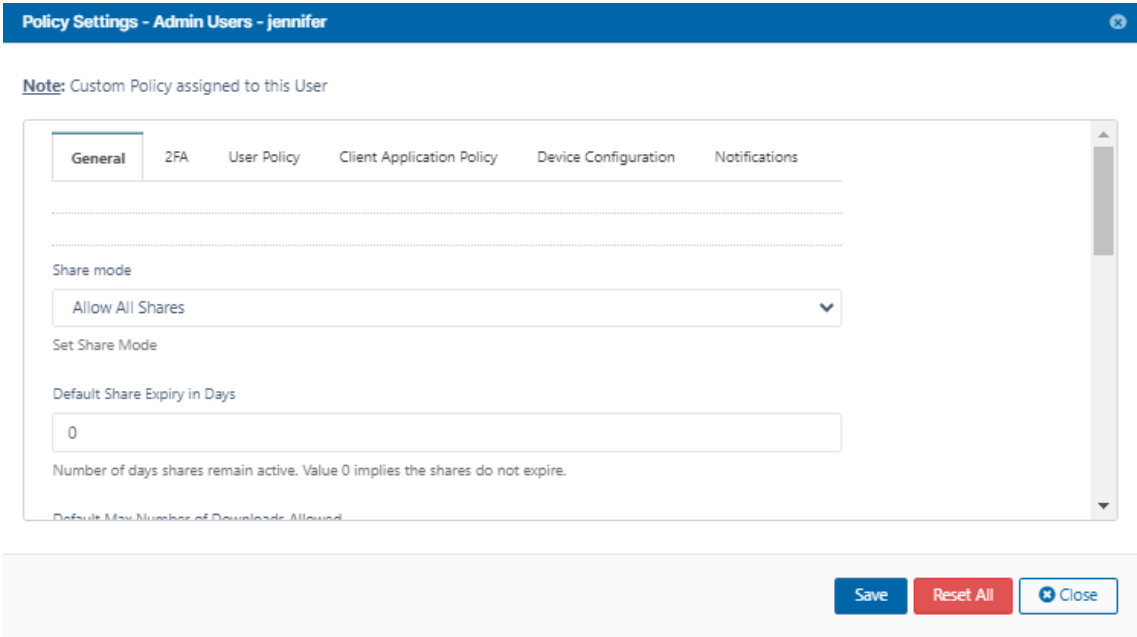
#### To edit a policy from a user account:

1. In the admin portal navigation panel, click **Users**.  
The **Manage Users** page opens.
2. Across from a user, click the Manage User Policy (gears) icon.

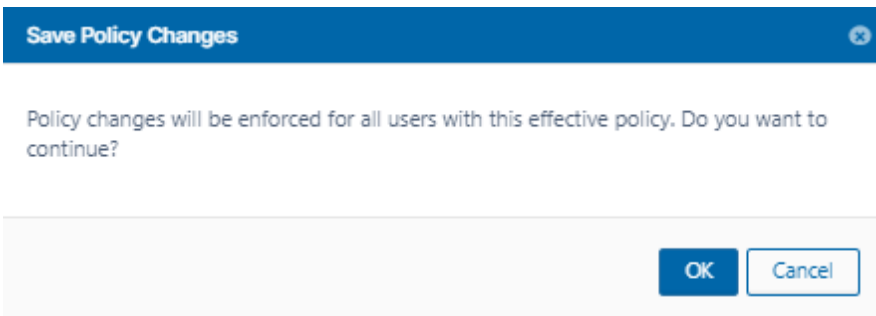


The **Policy Settings** dialog box opens.

3. Change the settings on any of the tabs.



4. **Click Save.**  
A confirmation prompt warns you that this will change the policy for all users who are assigned to it.



5. **Click OK.**  
The policy is changed.

### Calculate the Effectiveness of a User's Policy

An effective policy for a user is calculated on multiple factors.

This check is provided so you can see if group associations for this user changes how the policy you selected is enforced.

Learn more about Effective Policy Best Practices

### To calculate the effectiveness of a policy for a user:

1. Open a browser and log on to the admin portal.
2. From the navigation panel, click **Users**.
3. In the **Manage Users** window, select a user, and then click the Edit icon.
4. In the **User Details** window, click **Manage Policy**.
5. Next to the **Effective Policy** box, click **Calculate**.
6. The most effective policy for this user is shown in the box next to the **Calculate** button.
7. To see the details of a policy, click **Open**.

## Manage a User's Profile Picture


As a FileCloud administrator, you can update and remove a user's profile picture in the User Details screen.


If no profile image is chosen, the default is shown in the following figure:


User Details
×


---


Name	me	Total Quota	1 GB
Email	me@codelathe.com	Used Quota	198.5 MB
Last Login	06 Nov 2018 09:10	Available Quota	825.5 MB
Group	<a href="#">Manage</a>	Used Storage	198.5 M <a href="#">More</a>


  
Mobile  
Devices


  
Manage  
Files


  
Manage  
Shares

  
Reset  
Password


  
Email  
Password



  
Delete  
Account

  
Manage  
Policy

  
Manage  
Backups

Profile Image



 Update
 Remove

Access Level

Full ▼

Authentication

Default ▼

Email

me@codelathe.com

Save

Close

To update a user's profile image:

1. Open a browser and log on to Admin Portal.
2. From the left navigation panel, click **Users**.
3. In the users list, click the row containing the user whose picture you want to change.
4. Click the **edit icon**.
5. Next to **Profile Image**, to add an image, click **Update**.
6. Next to **Profile Image**, to remove an image, click **Remove**.

## Change a User's Email Address

As a FileCloud administrator, you can update a user's email address when it changes.

- After you update the email address, the user's shared files and folder will be updated to display this new email address

To change a user's email address:

1. Open a browser and log on to Admin Portal.
2. From the left navigation panel, click **Users**.
3. In the users list, click on the row of the user.
4. Click the **edit icon**.
5. On the User Details screen, scroll down to the editable Email box.
6. Type in the new email address.
7. Click **Save**.

## Setting a User Account to Expire



The issue with an expiration date automatically changing to the day before has been fixed in FileCloud Server version 18.2 and later.

As a FileCloud administrator, you can set up a user account to be temporary, and configure it to expire.

**User Details** ✕

Name	jessica	Total Quota	24.5 GB
Email		Used Quota	2.1 MB
Last Login	23 Aug 2022 14:16	Available Quota	24.5 GB
TOS Date	Not Accepted	Used Storage	2.1 MB
Group	<a href="#">Manage</a>	<a href="#">More ▾</a>	

Manage Files

Manage Policy

Manage Shares

Mobile Devices

Reset Password

Send Email

Manage Notifications

Manage Backups

Delete Account

Display Name

Account Expires On

← August 2022 →

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

Password Expires On

Email Verified

Disable Sync

Backup Path

[Save](#)
[Close](#)

### To see a user's details and what they have permission to do:

1. Open a browser and log on to Admin Portal.
2. From the left navigation panel, click **Users**.
3. In the users list, click on the row of the user.
4. Click the **edit icon** ().
5. Scroll down to see the **Account Expires On** field.
6. To see a calendar and select a date, click the text box.
7. To save your changes, click **Save**.

## Send Email from User Details

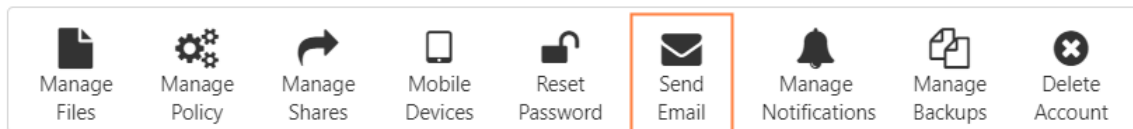
This option is available beginning in FileCloud 20.1

There are two types of emails you can send from the User Details window:

- A forgot password email that sends the user a password newly generated using the Reset Password option in User Details.
- An account welcome email that welcomes a new user to FileCloud. If the new user is not an AD user, the message includes a new password. If the new user is an AD user, the message does not include a new password.

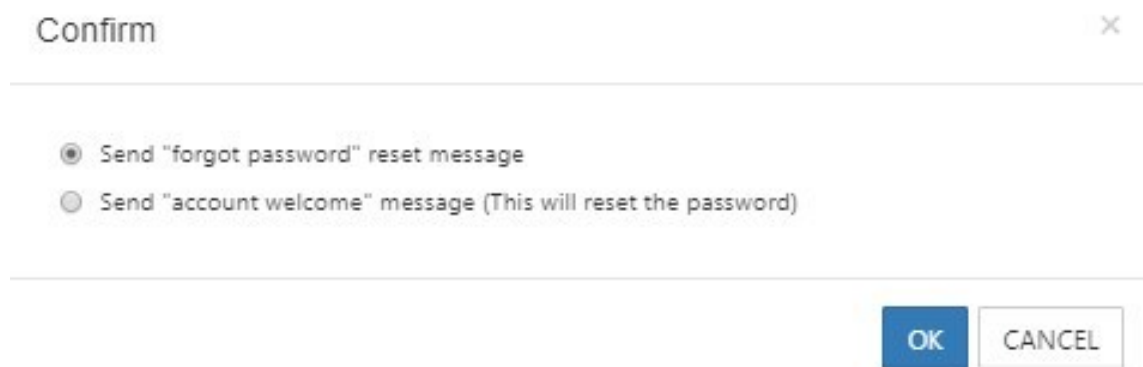
To send an email from User Details:

1. Click **Users** in the navigation panel.
2. Locate the user in the user list.
3. Click the **edit** icon under **Actions** to the right of the user.  
The User Details window opens.
4. Click the **Send Email** icon.



A dialog box for choosing the type of email opens.

**Note:** If the user has an AD account, there is no option to send a "forgot password" message. The dialog box only sends an account welcome message that does not include a new password.



5. Select **Send "forgot password" reset message** or **Send "account welcome" message**
6. To send the message, click **OK**.

# Managing Groups

A FileCloud Admin can manage User Groups.

Once a user group is created, the following operations can be performed:

- Change group details
- Delete a group
- View and Change Group members

To add a group, see Group Settings.

## Change a User Group Name

You can change any FileCloud group's name except for the **Everyone** and **Externals** groups.

**To change a group's name:**

1. Log on to admin portal.
2. In the navigation panel, click **Groups**.
3. Click the Edit icon for the desired group from the list of groups.
4. In the **Manage Group** dialog box, change the group name.
5. Click **Save** once the change is complete.

Manage Group

Group Name:  Save

Members Admins Policies

Members Management

Add Users to Group Import Users from AD Group

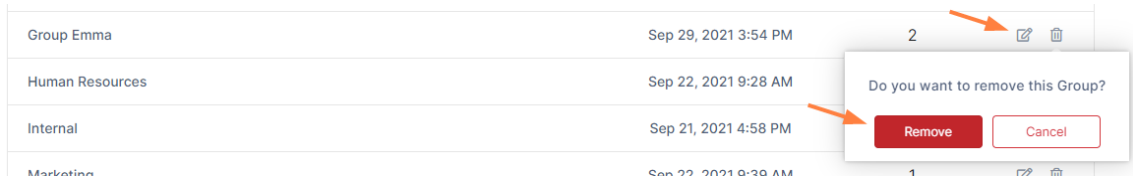
Search Users...

## Delete a User Group

**To delete a group:**

1. Log on to the admin portal.
2. In the navigation panel, click **Groups**.
3. Click the Delete icon for a group to remove it from the list of groups.

#### 4. Click **Remove** to confirm deletion.



Once a group is removed, network shares shared with that removed group will no longer be available to the former members of the group

## View and Change Group Members

You can change the members in any FileCloud group except the **EVERYONE** and **EXTERNALS** groups.

### To change a group's members:

1. In the navigation panel, click **Groups**.
2. Click the Edit icon for the group.
3. In the **Members** tab, view the members of the group.
4. To add a member, enter an existing FileCloud user's name or email address in the search bar, and click **Add**.
5. To remove a user, click **Remove** next to the user's name.

**Manage Group** ✕

Group Name:  Save

Members
Admins
Policies

### Members Management

Add Users to Group Import Users from AD Group

Q

Users in Group (3 members in this group) Export

Users	
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> <div> <p style="margin: 0;">david</p> <p style="margin: 0; font-size: 0.9em;">dm898002@gmail.com</p> </div> </div>	<span style="border: 1px solid #e74c3c; padding: 2px 5px; color: #e74c3c; font-size: 0.8em;">Remove</span>
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> <div> <p style="margin: 0;">Jared</p> <p style="margin: 0; font-size: 0.9em;">jaredtaylor978@gmail.com</p> </div> </div>	<span style="border: 1px solid #e74c3c; padding: 2px 5px; color: #e74c3c; font-size: 0.8em;">Remove</span>
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> <div> <p style="margin: 0;">Jessica</p> <p style="margin: 0; font-size: 0.9em;">jm2344311@gmail.com</p> </div> </div>	<span style="border: 1px solid #e74c3c; padding: 2px 5px; color: #e74c3c; font-size: 0.8em;">Remove</span>

< Page 1 of 1 >

Close

## Exporting a list of users in a group

To export a list of users in a group:

1. In the navigation pane, click **Groups**.
2. Click the Edit icon for a group.
3. In the **Members** tab of the **Manage Group** dialog box, click **Export**.

**Manage Group** ✕

Group Name:  Save

Members
Admins
Policies

**Members Management**

Add Users to Group Import Users from AD Group

Q

Users in Group ((count) members in this group) Export

Users	
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> <div> <p><b>Jared</b></p> <p style="font-size: small;">jaredtaylor978@gmail.com</p> </div> </div>	<span style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px; color: #c00;">Remove</span>
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> <div> <p><b>Jessica</b></p> <p style="font-size: small;">jm2344311@gmail.com</p> </div> </div>	<span style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px; color: #c00;">Remove</span>

<< < Page 1 of 1 > >>

Close

A csv file of users displaying the following fields is exported:

UserName	EmailID	Password	DisplayName	Status	ExpirationDate	Groups	EmailVerified	DisableNotific	LastLogin	Authentication	MobilePhone	Effective Policy
jaredtaylor978			Jared	FULL		EVERYONE, Human Resources Group	YES	NO	10/18/2021 12:36	Default		Global Default Policy
jessicam			Jessica	FULL		EVERYONE, Internal, Human Resources	YES	NO	2/10/2022 14:08	Default		Global Default Policy

## View and Change Group Admins

Group admins have the ability to add and/or remove users from the group. You can add, remove, and change the permissions of group admins in the Admins tab. A user's policy also may enable them to add and/or remove users from groups.

### To modify group admin settings:

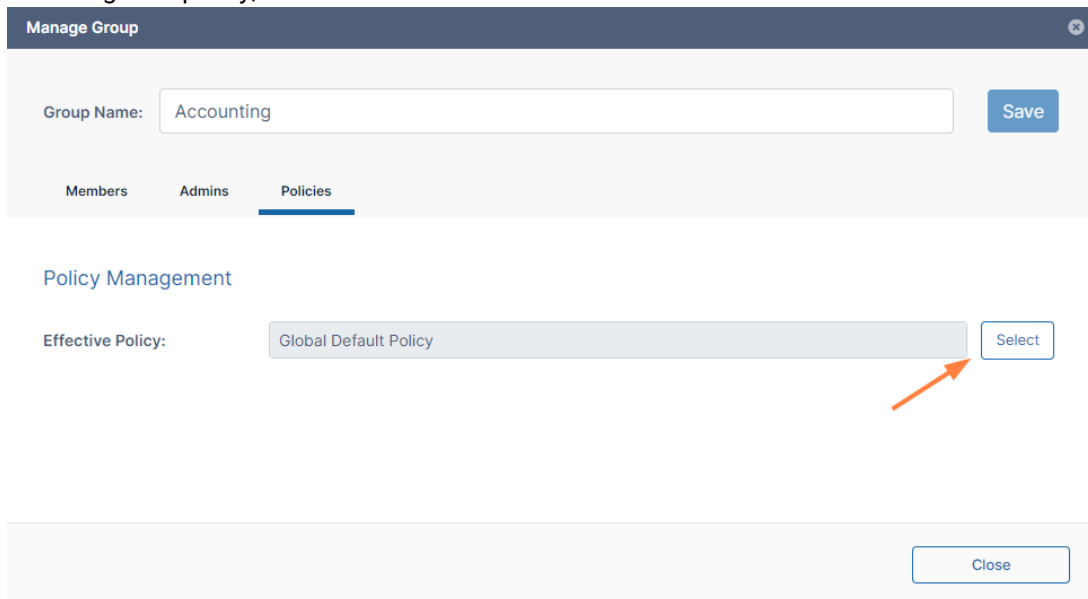
1. In the navigation panel, click **Groups**.
2. Click the Edit icon for the group.
3. In the **Admins** tab, view the admins of the group.
4. To add an admin, enter an existing FileCloud user's name or email address in the search bar, and click **Add**.
5. To remove an admin, click **Remove** next to the admin's name.
6. To change an admin's permissions, check or uncheck **Can add users** or **Can remove users**.

To import an AD group into a FileCloud group, see [Group Settings](#)

## View and Change a Group's Policy

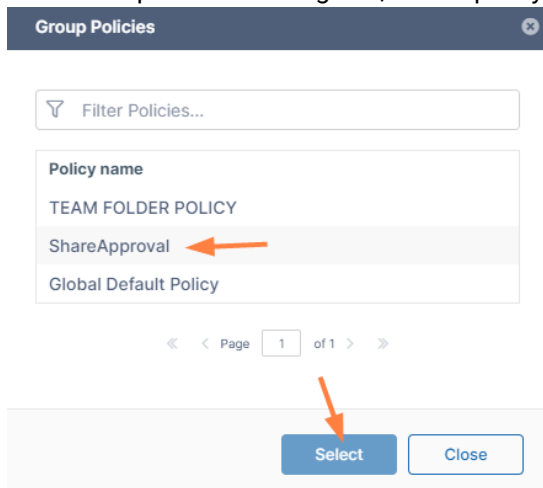
To change a group's policy:

1. In the navigation panel, click **Groups**.
2. Click the Edit icon for the group.
3. Click the **Policies** tab to view the group's policy.
4. To change the policy, click **Select**.



The screenshot shows the 'Manage Group' dialog box with the 'Policies' tab selected. The 'Group Name' field contains 'Accounting'. Below the tabs, the 'Policy Management' section shows 'Effective Policy' set to 'Global Default Policy'. A 'Select' button is located to the right of the dropdown menu, with an orange arrow pointing to it. At the bottom right of the dialog, there is a 'Close' button.

5. In the Group Policies dialog box, click a policy and click **Select**.



The screenshot shows the 'Group Policies' dialog box. It features a search bar labeled 'Filter Policies...'. Below it is a list of policies: 'TEAM FOLDER POLICY', 'ShareApproval', and 'Global Default Policy'. The 'ShareApproval' policy is highlighted, with an orange arrow pointing to it. At the bottom of the dialog, there are 'Select' and 'Close' buttons, with another orange arrow pointing to the 'Select' button. A pagination indicator shows 'Page 1 of 1'.

The policy is changed.

6. Click **Close**.

## View and Change an SSO-imported Group's Sync Options

Groups that are imported from SSO providers have an additional tab in the **Manage Group** dialog box with options for syncing FileCloud with the SSO provider.

### To change an SSO-imported group's synchronization options:

1. In the navigation panel, click **Groups**.
2. Click the Edit icon for the group.
3. Click the **Sync Options** tab to view the group's sync options.
4. Change any of the sync options.

The screenshot shows the 'Manage Group' dialog box with the 'Sync Options' tab selected. The group name is 'Marketing'. The 'Automatic Sync' and 'Remove Members' options are enabled (toggles are turned on), while 'Dynamic Members Import' and 'Disable Members' are disabled (toggles are turned off). An orange arrow points to the 'Remove Members' toggle.

Their functions are as follows:

<b>Automatic Sync</b>	Enabled by default. FileCloud periodically imports new users from the group in the SSO provider to the group in FileCloud.
<b>Remove Members</b>	Disabled by default. The group and its permissions are imported without its users. When a member of the group logs into FileCloud for the first time, the member is automatically placed into the group.
<b>Dynamic Members Import</b>	Disabled by default. Users are automatically placed into the correct groups when they are imported.
<b>Disable Members</b>	Disabled by default. FileCloud users that are disabled in the SSO group are also disabled in the FileCloud group.

5. Click **Close**.

## Managing Admin Users

FileCloud enables you to create admin roles with a set of administrator permissions. Users assigned to any of the admin roles that you have created become admin users and have the permissions assigned to the role.

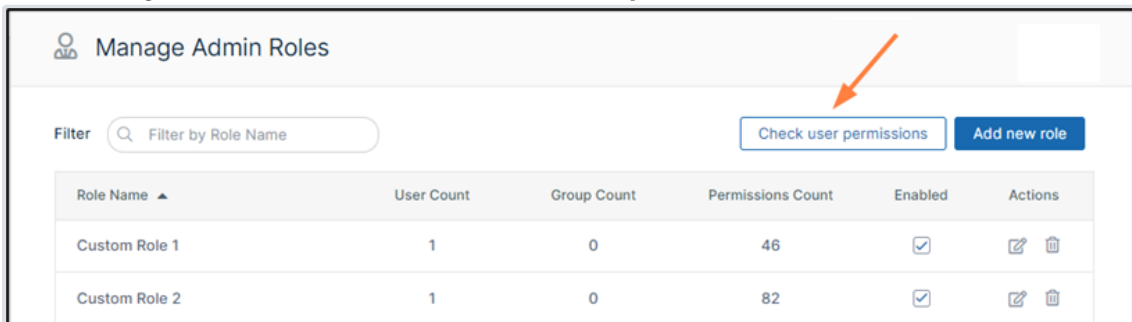
For information on about admin roles and admin users and instructions for setting them up, see Admin User and Role Settings.

### Check an admin user's permissions

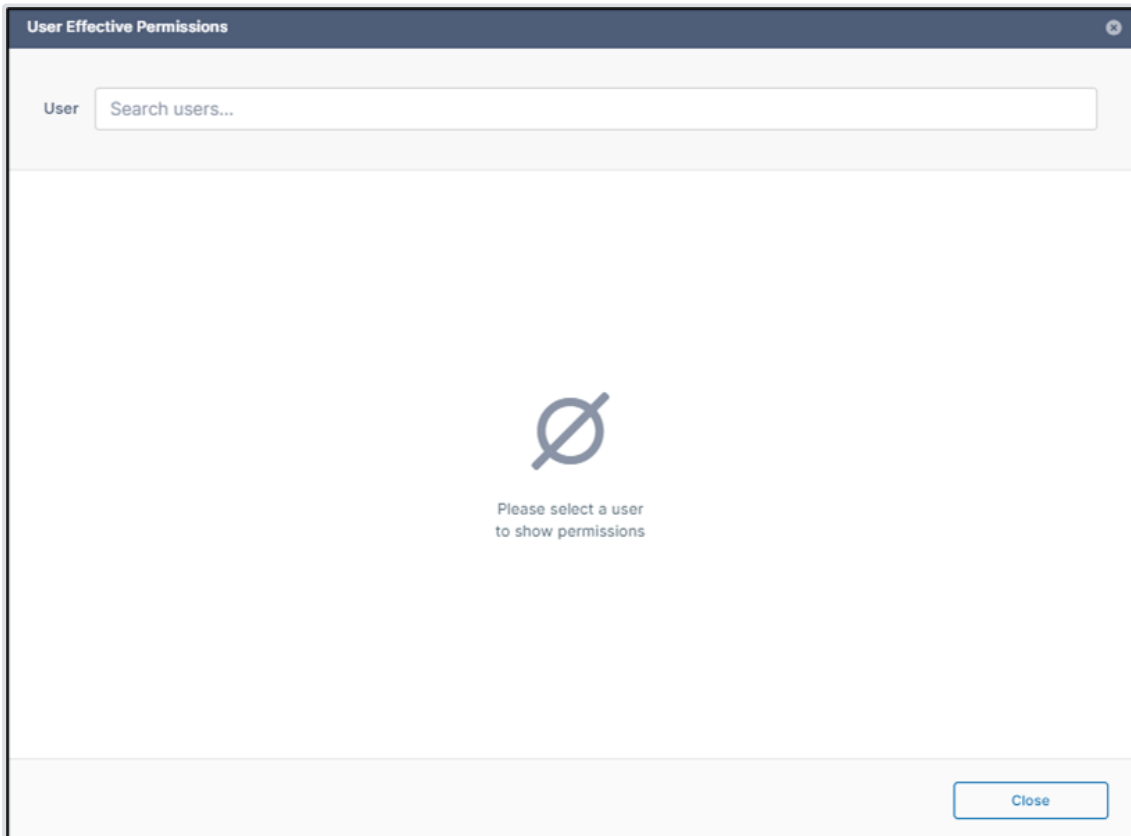
If an admin user has one role, the user has the permissions assigned to that role, but if an admin user has multiple roles, the user has the combined permissions of all of its roles.

**To check all of a user's permissions:**

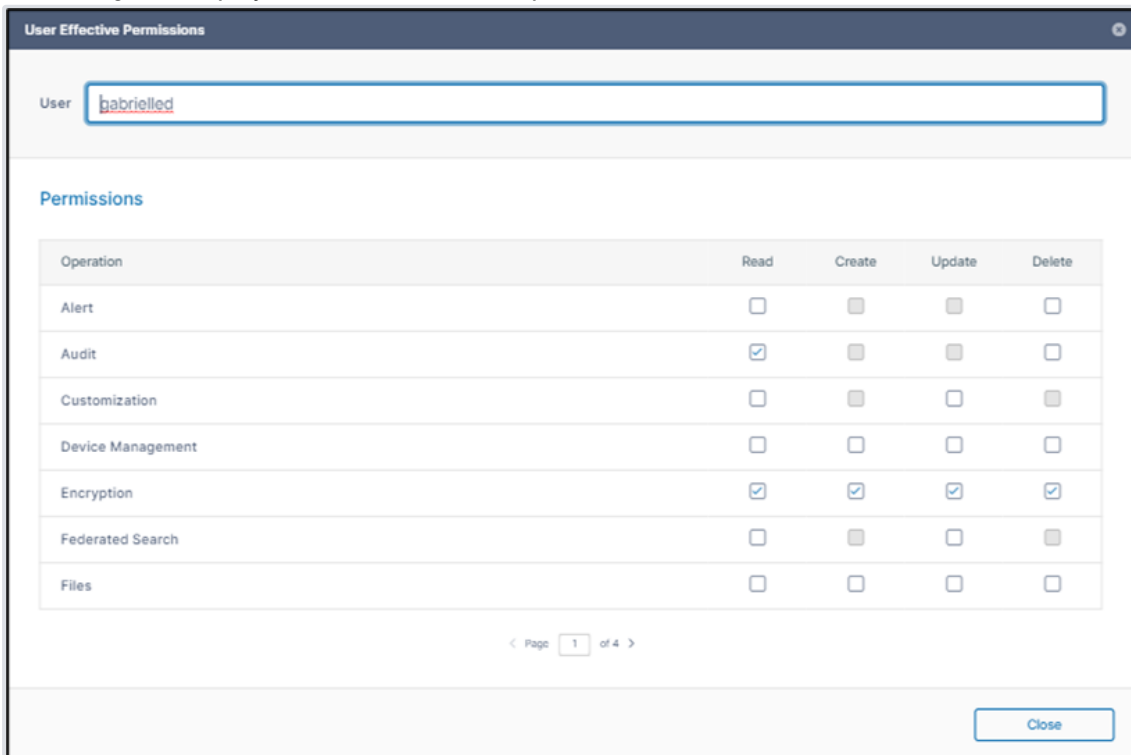
1. Click **Admins** in the navigation panel.
2. In the **Manage Admin Roles** screen, click **Check user permissions**.



The **User Effective Permissions** dialog box opens.



3. In **User**, enter the name of the user.  
The dialog box displays the user's combined permissions with checks next to them.



## Definitions of Permissions

The following permissions represent functions that admin users may be permitted to perform.

Operation	Description
Alert	Alert item on the admin interface is visible. Authorization to view and clear alerts in admin interface.
Audit	Audit item on the admin interface is visible. Authorization to view, delete and export Audit Records.
Compliance	Compliance Dashboard on the admin interface is visible. Authorization to view and update compliance settings.
Customization	Customization item on the admin interface is visible. Authorization to customize the FileCloud interface. <b>Note:</b> Admin users must have <b>Customization &gt; Update</b> enabled to be able to change the user login background.
Device Management	Devices item on the admin interface is visible. Authorization to view, create, delete and update Devices.
Encryption	Authorization to manage all Encryption at Rest settings.
Federated Search	Support to perform federated search through the admin interface.
Files	Manage Files. Authorization to view, create, modify, download, and delete user files.
Folder Permissions	Manage Folder Level Permissions. Authorization to view and manage Folder Permissions.
Groups	Groups menu item on the admin interface is visible. Authorization to view, create, modify and delete Groups. Manage group members. Import group members from Active Directory.
Locks	View , create, and delete Locks on Files and Folders in FileCloud.
Manage Administrators	Allows promoted admin users to manage the permissions of other promoted admin users.
Metadata	View, create, update and delete metadata set definitions, attributes and permissions.

Operation	Description
Mini Admin	View allows promoted users to open mini admin and perform all permitted actions except adding users. Create allows promoted users to open mini admin and perform all permitted actions including adding users.
Network Share	Network Folders item on the admin interface is visible. Authorization to view, create, modify and delete Network Folders. Manage User and Group Access to Network Folders.
Notifications	Notifications menu item on the admin interface is available. Add, edit, update, and delete notification rules.
Reports	Reports menu item on the admin interface is available. Add, execute, edit and delete reports.
Retention	Retention menu item on the admin interface is available. Add, edit, and delete retention policies.
Rich Dashboard	View rich dashboard view including tables and graphs on the admin UI dashboard.
Settings	Settings item on the admin interface is visible. Authorization to view and modify FileCloud Settings.
Smart Classification	Smart Classification menu item on the admin interface is available. Add, update, run, and delete content classification rules.
Smart DLP	Smart DLP menu item on the admin interface is available. Add, edit, and delete DLP rules.
System	System item on the admin interface is visible. Authorization to run system checks, install check, generate logs and UPGRADE FileCloud to new version.
Team Folders	Set up Team Folders, add, edit, delete and manage team folder and corresponding permissions. <i>Note: The corresponding Folder Permission must be enabled to be able to perform a Team Folder operation.</i>
User Share	User Shares item on the admin interface is visible. Authorization to view, create, modify and delete User Shares.
Users	Users menu item on the admin interface is visible. Authorization to view, create, modify and delete Users. Import New Users. Reset Password for Users.
Workflow	Workflow menu item on the admin interface is visible. Add, edit and delete workflows on FileCloud.

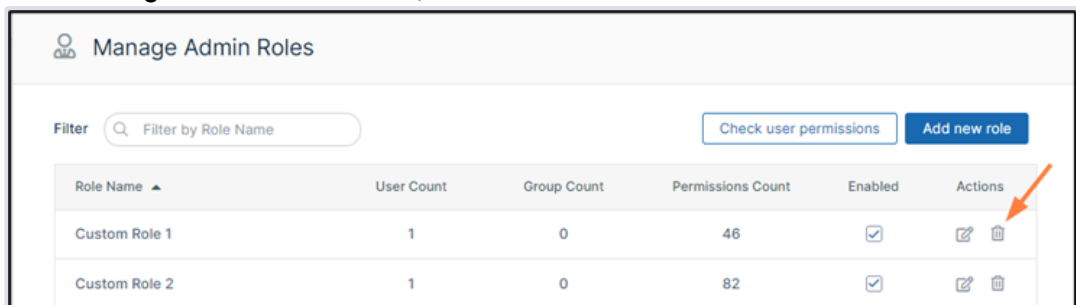
Admin users can log in to the admin portal using either their username or email id.

## Remove an admin role

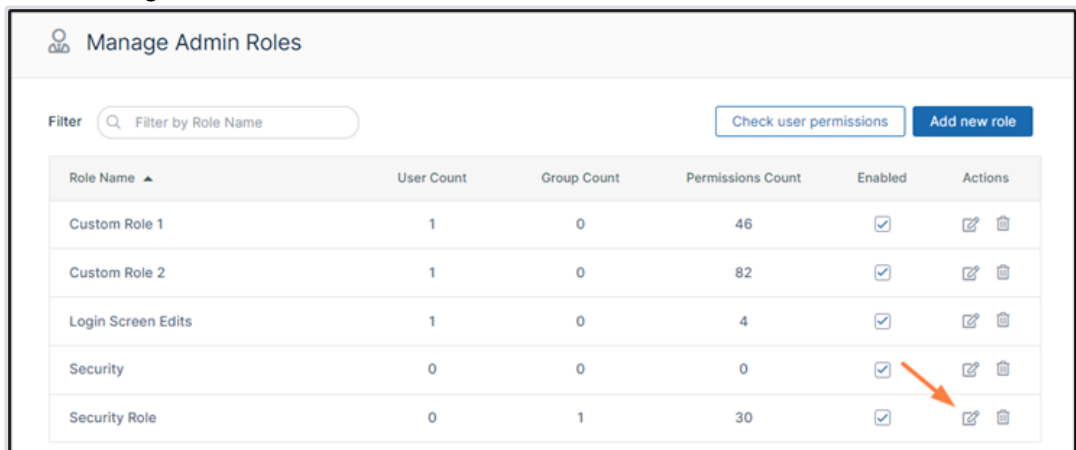
When you remove an admin role, you permanently delete it. To recreate it, you must create it, assign all permissions, and add users and groups again.

### To remove an admin role:

1. Click **Admins** in the navigation panel.
2. Either
  - In the **Manage Admin Roles** screen, click the **Delete** button for the role.

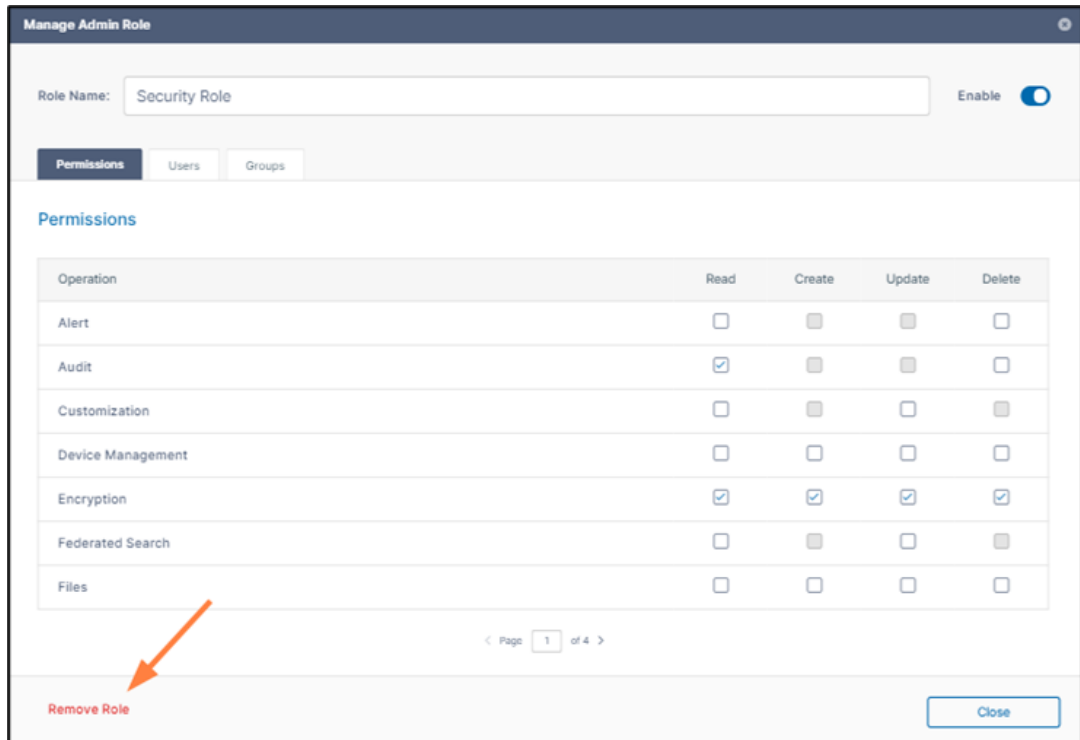


- Click **Remove** when you are prompted to confirm removal.
- Or:
- In the **Manage Admin Roles** screen, click the **Edit** button for the role.



The **Manage Admin Role** dialog box opens.

- Click **Remove Role** at the bottom of the dialog box.



3. Click **Remove** when you are prompted to confirm removal.

# Managing User Folders and Files


As an administrator, you can manage the files that are stored on your FileCloud Server site.

This allows you to protect and maintain your system in the following ways:

- Remove user files infected with a virus
- Remove files belonging to a user that no longer has an account
- Move folders for teams
- Download, copy and move files at a user's request
- Manage your storage space limits by moving or deleting files
- Copy and move files and folders between two FileCloud users

## How do I access user storage management settings?

To access user folder and files settings:

1. Open a browser and log on to the Admin Portal.
2. From the left navigation menu, select Users.
3. On the Manage Users page, select a user, and then click the Edit icon 


- On the User Detail dialog box, click **Manage Files**.

**User Details**

Name	alex	Total Quota	2 GB
Email	alex@example.com	Used Quota	0 B
Last Login	08 Jan 2024 12:24	Available Quota	2 GB
TOS Date	Not Accepted	Used Storage	0 B
Group	<a href="#">Manage</a>		<a href="#">More</a>

[Manage Files](#)
[Manage Policy](#)
[Manage Shares](#)
[Mobile Devices](#)
[Reset Password](#)
[Send Email](#)
[Manage Notifications](#)
[Manage Backups](#)
[Delete Account](#)

Profile Image



[Update](#) [Remove](#)

Access Level:

Authentication:

[Save](#) [Close](#)

- The Manage Files for <User> window opens.

#### In this section:

## Add Folder-Level Permissions to User Folders

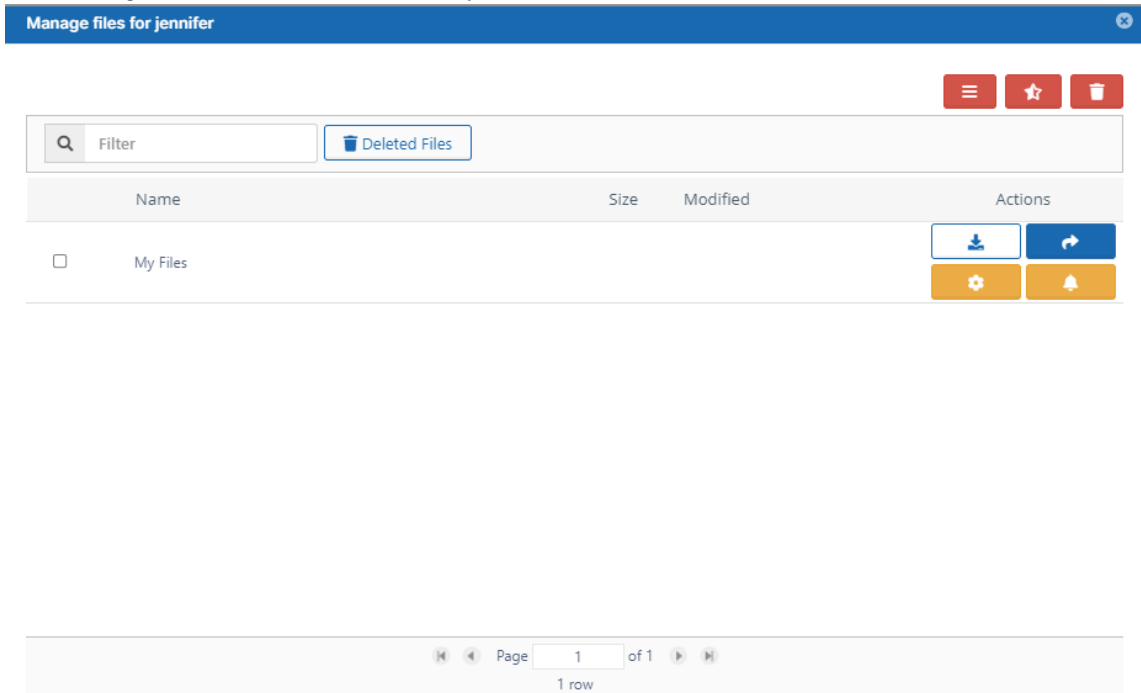
Folder-level permissions are permissions that are applied directly to a folder. They add additional restrictions to the share permissions when the folder is shared. Note that whatever is more restrictive, folder-level or share permissions, apply. For more information, see Folder-Level Permissions.

From the **Manage Users** page, you can access a user's details and edit permissions that are applied directly to a folder.

#### To assign folder-level permissions to users' folders:

- In the admin portal's left navigation panel, click **Users**.

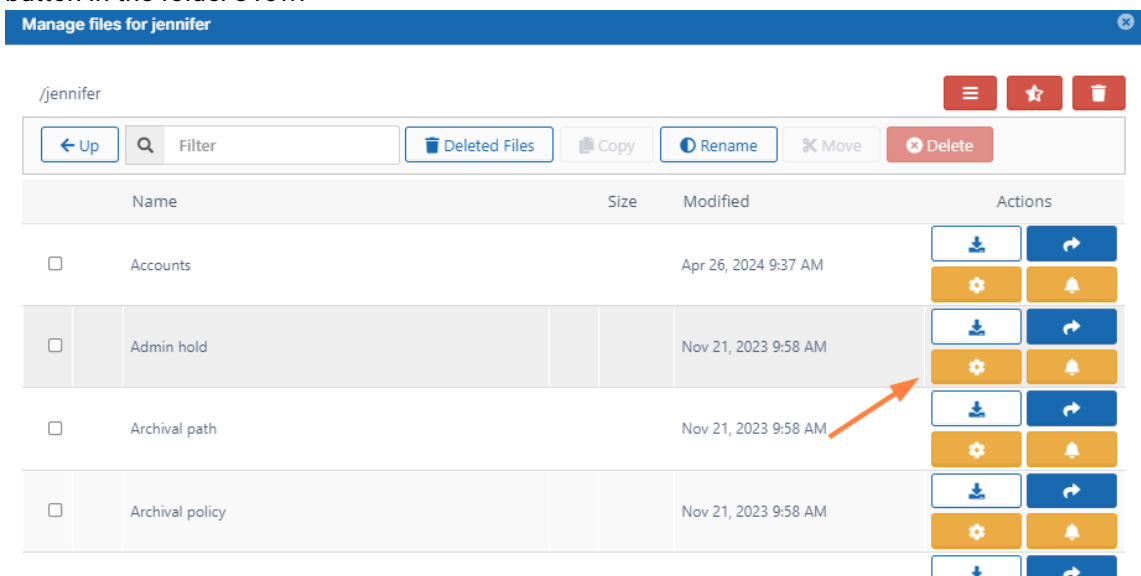
2. On the **Manage Users** page, select a user, and then click the Edit icon.
3. On the **User Details** dialog box, click **Manage Files**.  
The **Manage Files for <User>** window opens.



4. Expand **My Files** and locate the folder that you want to set folder-level permissions for.
5. Click the **Manage Access**



button in the folder's row.



The **Manage Folder Level Security** dialog box opens. Any folder-level permissions that are already effective appear.

6. Follow the steps below to assign and change user and group folder-level permissions. Users who do not appear on the list have all folder-level permissions to the folder (unless their group permissions are limited)

Folder: /jennifer/Admin hold

Security Check Access

Permissions

Inherit Parent Folder Security:  Inherit  Don't Inherit

User Group

Add User

User	Read	Write	Delete	Share	Manage
dm898002@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Page 1 of 1

Inherited Permissions

User	Read	Write	Delete	Share	Manage
jm2344311@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Page 1 of 1

Close

**A** By default, **Inherit** is selected. If you select **Don't Inherit**, users do not inherit permissions from this folder's parent folder, and the lower **Inherited Permissions** section no longer appears.

**B** Click **Add User** to add a user and limit their access to the folder, or click the **Group** tab and add a group.

**C** In the top list of users, check or uncheck levels of permissions.

## Copy and Move User Files



This action will be recorded in the Audit log as:  
"Action performed by ADMIN"

As an administrator, you can copy and move user files that are stored on your FileCloud Server site.

This allows you to protect and maintain your system in the following ways:


- Move folders for teams
- Download, copy and move files at a user's request
- Manage your storage space limits by moving or deleting files
- Copy and move files and folders between folder locations for two different user accounts
- Copy and move files and folders between folder locations for the same user account

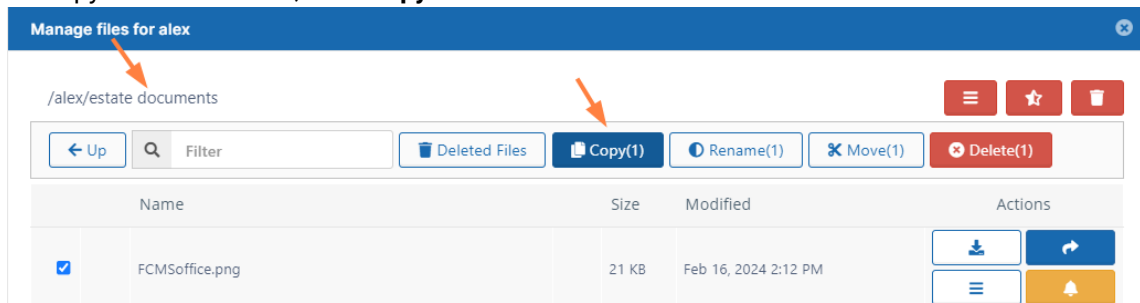
### What is the difference between copy and move?

Copying a file will allow you to have the same file in two different locations.

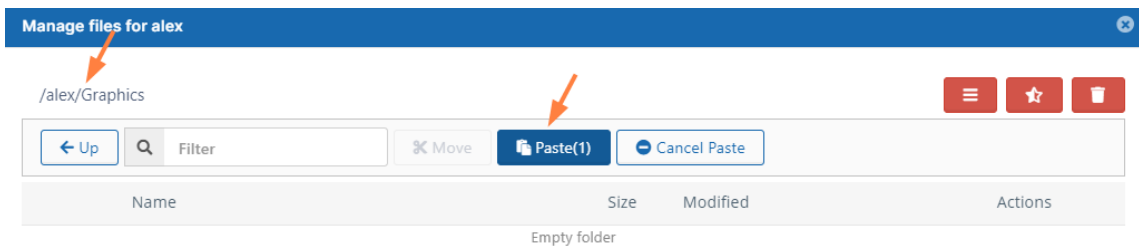
Moving a file will allow you to put the file in a new location so it can be removed from the original location.

### To copy and paste files and folders between folder locations for the same user account:

1. Open a browser and log on to the Admin Portal.
2. From the left navigation menu, select Users.
3. On the Manage Users page, select a user, and then click the Edit icon .
4. On the User Detail dialog box, click **Manage Files**.  
The Manage Files for <User> window opens.
5. Navigate to the folder or file you want to copy.
6. To select the file or folder, click the checkbox next to the name.
7. To copy the file or folder, click **Copy**.

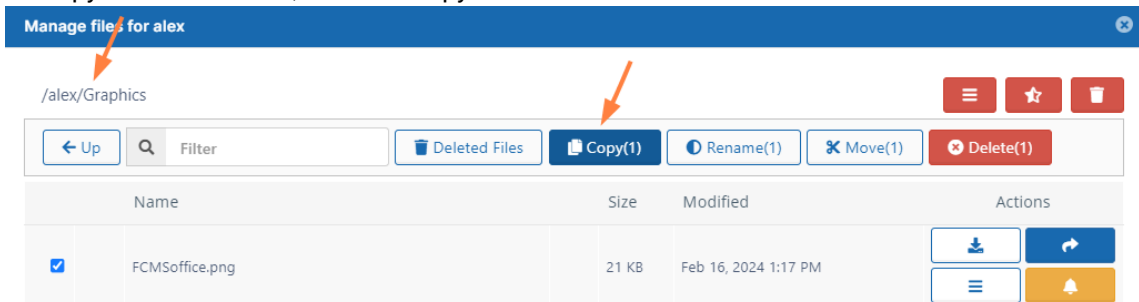


8. Navigate to the folder where you want to paste the copy.
9. Click **Paste**.

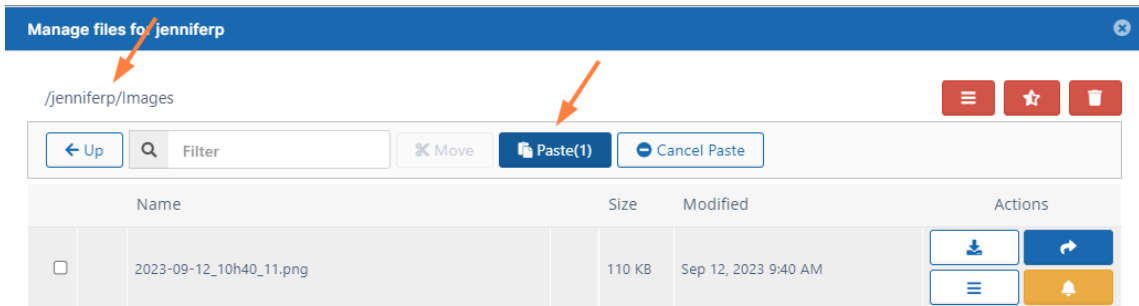


**To copy and paste files and folders between folder locations for two different user accounts:**

1. Open a browser and log on to the Admin Portal.
2. From the left navigation menu, select Users.
3. On the Manage Users page, select a user, and then click the Edit icon.
4. On the User Detail dialog box, click **Manage Files**.  
The Manage Files for <User> window opens.
5. Navigate to the folder or file you want to copy.
6. To select the file or folder, click the checkbox next to the name.
7. To copy the file or folder, click the Copy button.

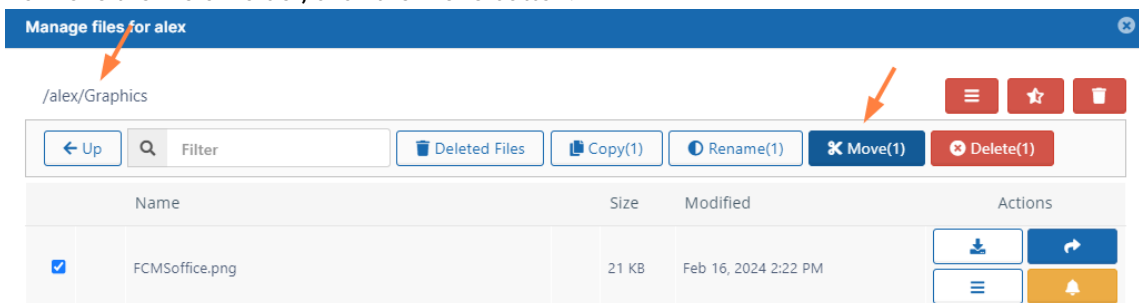


8. To close the window, in the top right corner, click the x button.
9. On the Manage Users page, select the user who wants a copy of the file or folder, and then click the Edit icon.
10. On the User Detail dialog box, click **Manage Files**.  
The Manage Files for <User> window opens.
11. Navigate to the folder or file where you want to paste the copy.
12. Click **Paste**.

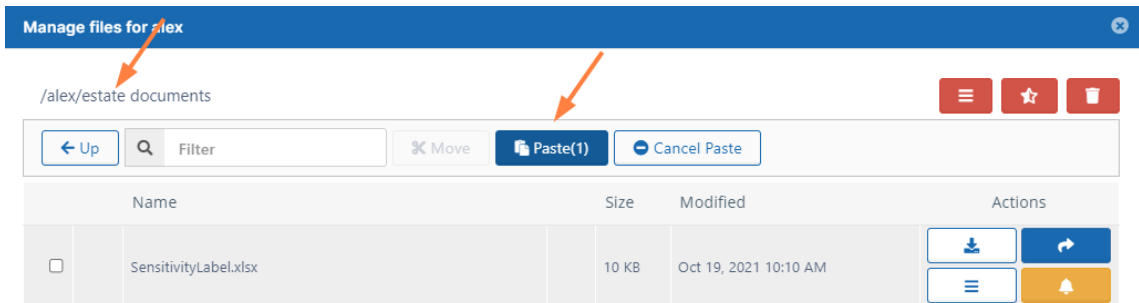


### To move and paste files and folders between folder locations for the same user account:

1. Open a browser and log on to the Admin Portal.
2. From the left navigation menu, select Users.
3. On the Manage Users page, select a user, and then click the Edit icon.
4. On the User Detail dialog box, click **Manage Files**.  
The Manage Files for <User> window opens.
5. Navigate to the folder or file you want to move.
6. To select the file or folder, click the checkbox next to the name.
7. To move the file or folder, click the **Move** button.

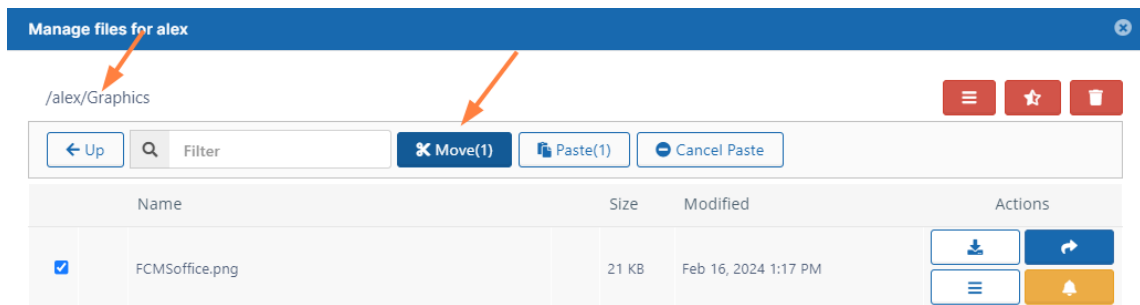


8. Navigate to the folder where you want to paste the original file or folder.
9. Click **Paste**.

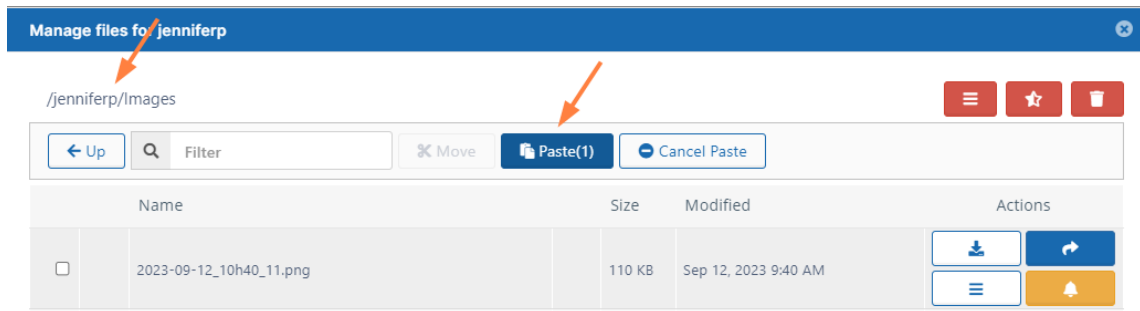


### To move and paste files and folders between folder locations for two different user accounts:

1. Open a browser and log on to the Admin Portal.
2. From the left navigation menu, select Users.
3. On the Manage Users page, select a user, and then click the Edit icon.
4. On the User Detail dialog box, click **Manage Files**.  
The Manage Files for <User> window opens.
5. Navigate to the folder or file you want to move.
6. To select the file or folder, click the checkbox next to the name.
7. To move the file or folder, click the **Move** button.



8. To close the window, in the top right corner, click the x button.
9. On the Manage Users page, select the user who wants the file or folder, and then click the Edit icon.
10. On the User Detail dialog box, click **Manage Files**.  
The Manage Files for <User> window opens.
11. Navigate to the folder or file where you want to paste the original.
12. Click **Paste**.



## Download User Files and Folders

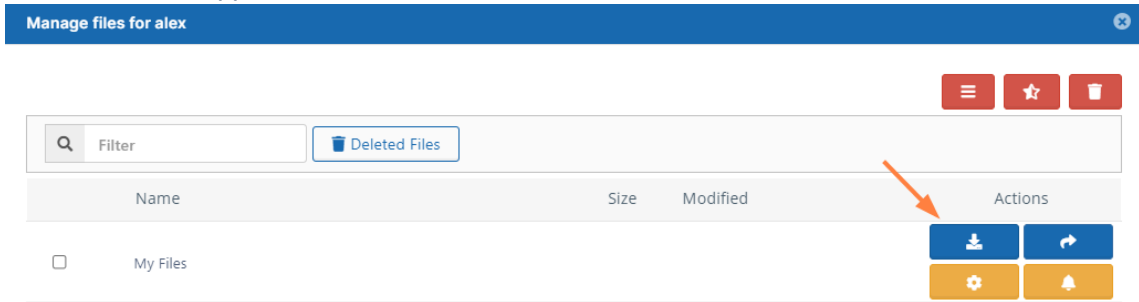
**i** To disable users' ability to download folders from the user portal, see the setting **Disable Folder Download** at General Customization.

As an administrator, you can manage the files that are stored on your FileCloud Server site. This allows you to protect and maintain your system.

### Can I download all of a user's files at once?

- You can easily download all of a user's files by downloading the My Files folder.

- Folders are first zipped and then downloaded.

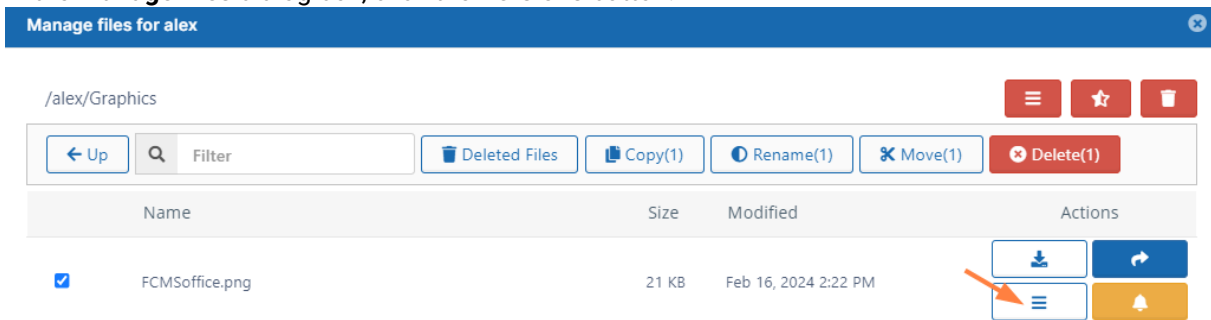


**Can I download an older version of a file?**

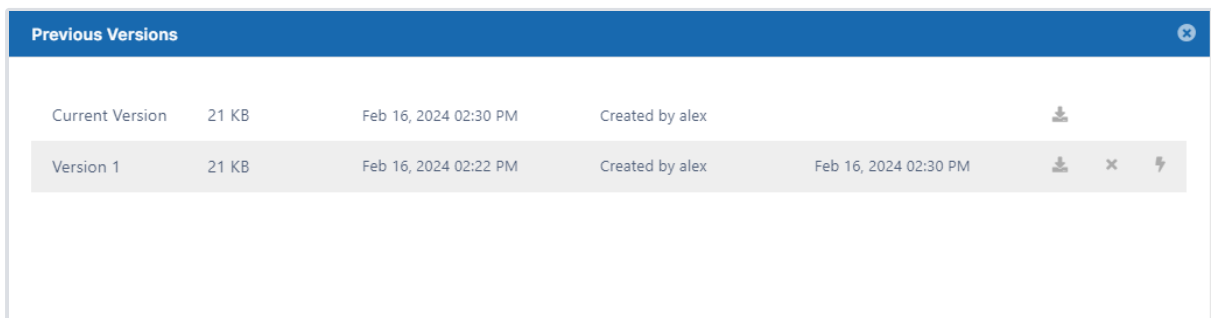
If the user has uploaded changes to a file, you can:

- download the latest version
- download a previous version

In the **Manage files** dialog box, click the **Versions** button.




Find the version you want to download and click its **Download** icon.




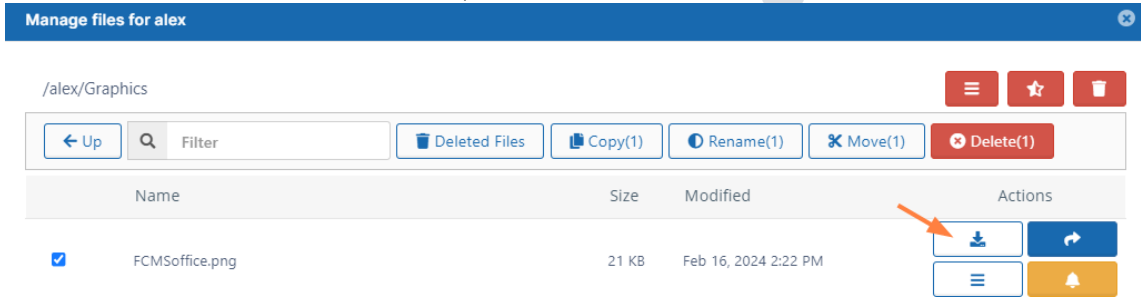
If you have older versions on your site, you may:

- Restore the previous version of a file and make it live
- Remove previous versions to save space


**To download user folder and files:**

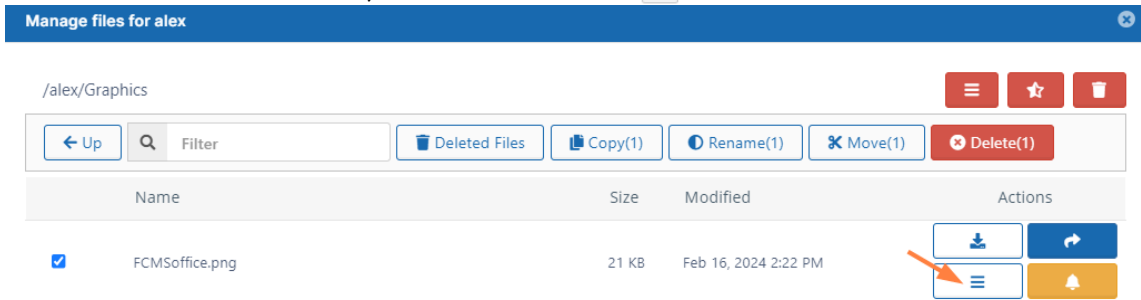
1. Open a browser and log on to the Admin Portal.
2. From the left navigation menu, select Users.
3. On the Manage Users page, select a user, and then click the Edit icon  .


4. On the User Detail dialog box, click **Manage Files**.  
The Manage Files for <User> window opens.
5. Navigate to the folder or file you want to download.
6. To download the latest version of a file, click the Download icon  .

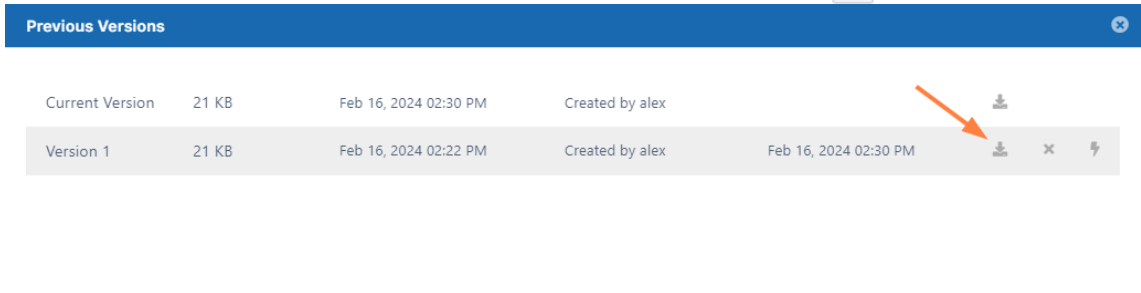


**OR**

To download an earlier version, click the Version icon  .



Then select the version from the list and then click the Download icon  .



## Cancel User Uploads in Progress


 This action:

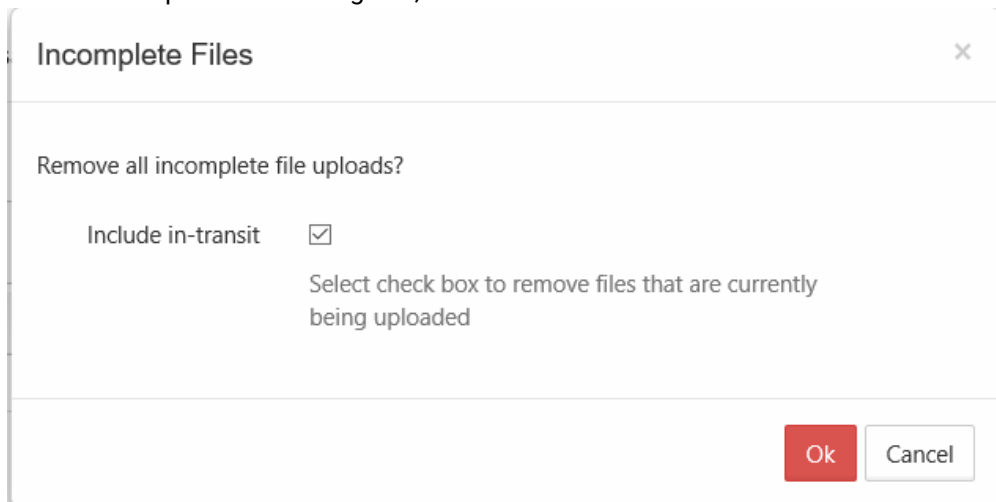
- Is recorded in the Audit log as: "Action performed by ADMIN"
- Cannot be undone

As an administrator, when a user is uploading a file and you want to cancel the upload, if it is only partially completed, you can cancel it using the Remove All Incomplete Uploads button using the Include in-transit option.

- This is useful if you discover the file is infected and want to stop the upload
- If the file is too large or contains inappropriate content, you can cancel the upload before it completes

#### To stop all partial user uploads from completing:

1. Open a browser and log on to the Admin Portal.
2. From the left navigation menu, select Users.
3. On the Manage Users page, select a user, and then click the Edit icon.
4. On the User Detail dialog box, click **Manage Files**.  
The Manage Files for <User> window opens.
5. Click the Remove all incomplete uploads icon  .
6. On the Incomplete Files dialog box, select the Include in-transit checkbox.



7. Click OK.

## Delete User Folders and Files



This action is recorded in the Audit log as:  
"Action performed by ADMIN"

As an administrator, you can manage the files that are stored on your FileCloud Server site.

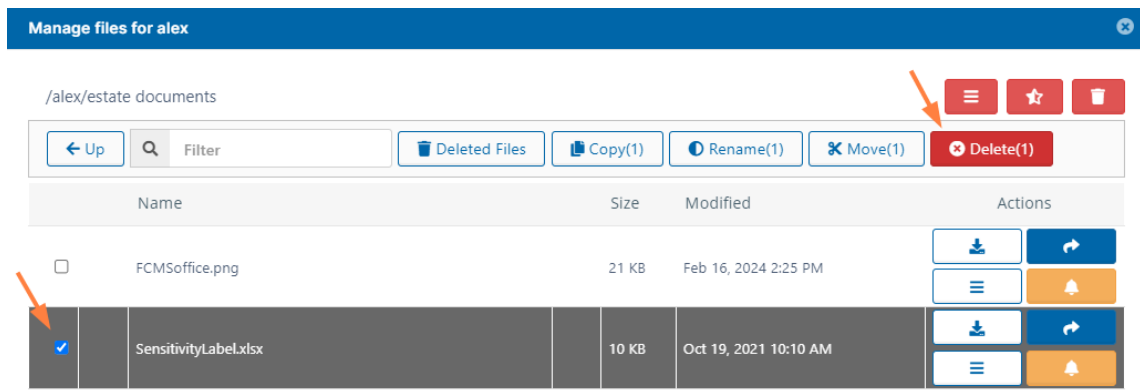
This allows you to protect and maintain your system in the following ways:

- Remove user files infected with a virus
- Remove files belonging to a user that no longer has an account
- Manage your storage space limits by moving or deleting files

💡 Deleting a file or folder moves it to the Deleted Files recycle bin. To permanently remove a file, you must clear it from the recycle bin.

### To delete files and folders:

1. Open a browser and log on to the Admin Portal.
2. From the left navigation menu, select Users.
3. On the Manage Users page, select a user, and then click the Edit icon.
4. On the User Detail dialog box, click **Manage Files**.  
The Manage Files for <User> window opens.
5. Navigate to the folder or file you want to delete.
6. To select the file or folder, click the checkbox next to the name.
7. Click the **Delete** button.



8. On the **Confirm** dialog box, click **OK**.

## Clear a Recycle Bin



This action:

- Is recorded in the Audit log as: "Action performed by ADMIN"
- CANNOT be undone

As an administrator, you can [delete a user's files and folders](#).

💡 After you delete files and folders, they are normally placed in the user's Recycle Bin, which you can also manage.

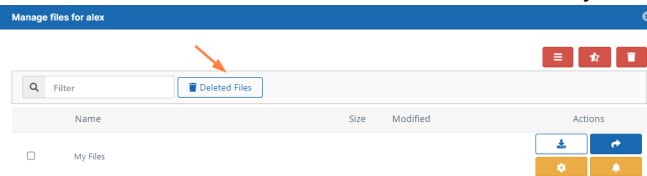
- If you have a policy that stores deleted files, they are saved in the Recycle Bin
- This means that they can be recovered if deleted by mistake or are needed again at a later time
- You can also set the Recycle Bin to automatically delete through a policy

Manage the Recycle Bin Using a Policy

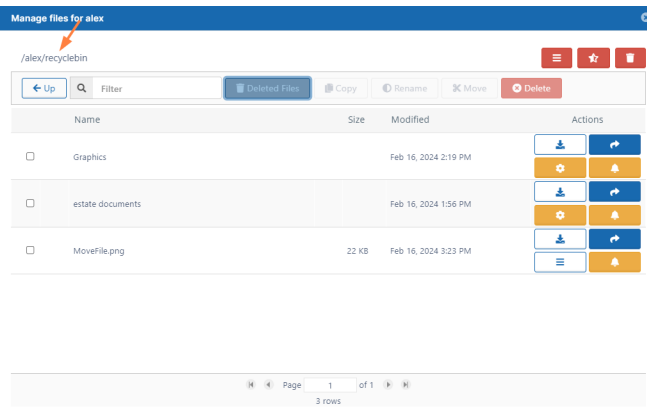
## Go to the recycle bin

To go to a user's recycle bin:

1. In the Admin portal, go to the **Users** page, select a user, and click the edit icon. In the **User Details** dialog box, click **Manage Files**.
2. Click **Deleted Files** to view the contents of the recycle bin:



The recycle bin opens and displays deleted files. If the deleted files are in subfolders, navigate into the subfolders to locate them.



## Clear a deleted file or folder

To clear a deleted file or folder from a user's recycle bin:

1. Follow the steps above to go to the recycle bin.
2. Navigate to the file or folder you want to delete from the recycle bin.
3. Check the file or folder.

Manage files for alex

/alex/recyclebin/estate documents

Up Filter Deleted Files Copy(1) Rename(1) Move(1) Delete(1)

Name	Size	Modified	Actions
<input checked="" type="checkbox"/> FCMSoffice.png	21 KB	Feb 16, 2024 1:56 PM	Download Share

4. Click **Delete**.
5. In the **Confirm** dialog box, click **Yes**.  
The file or folder is deleted from the recycle bin (permanently removed from FileCloud).

### Clear all deleted files



Only recycle bins with contents less than 16 MB of data can be cleared using this method.

### To clear all files and folders from a user's recycle bin:

1. Follow the steps above to go to the recycle bin.
2. Click the trash icon in the upper right corner.

Manage files for alex

/alex/recyclebin

Up Filter Deleted Files Copy Rename Move Delete

Name	Size	Modified	Actions
<input type="checkbox"/> Graphics		Feb 16, 2024 2:19 PM	Download Share
<input type="checkbox"/> estate documents		Feb 16, 2024 1:56 PM	Download Share
<input type="checkbox"/> MoveFile.png	22 KB	Feb 16, 2024 3:23 PM	Download Share

Page 1 of 1  
3 rows

3. In the **Confirm** dialog box, click **OK**.  
All files and folders are deleted from the recycle bin (permanently removed from FileCloud).

## Remove a User's Old File Versions



This action:

- Is recorded in the Audit log as: "Action performed by ADMIN"
- CANNOT be undone

As an administrator, you can delete older versions of files that are stored on your FileCloud Server site.

- This allows you to free up space when previous versions of a file are not needed anymore.
- This can also be used to clean up storage space for users who no longer have a FileCloud Server account for your site.

💡 This action does not remove the current version of a file, only all older versions saved on the FileCloud Server.

### How do I know if there are previous versions of a file?

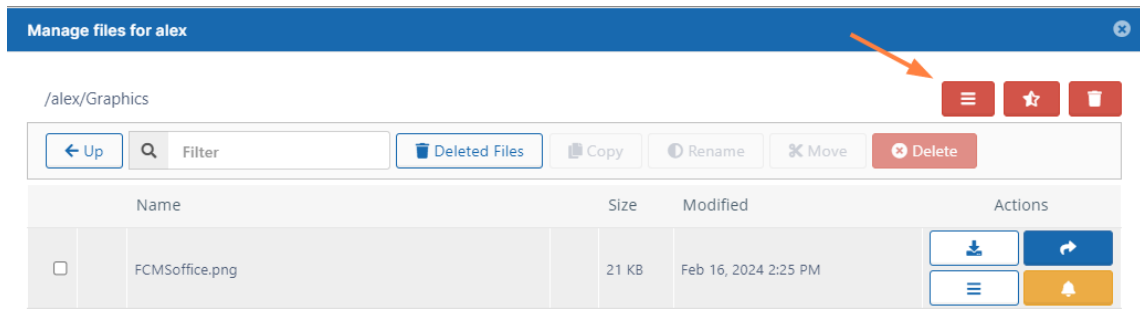
1. Open a browser and log on to the admin portal.
2. From the left navigation menu, select **Users**.
3. On the Manage Users page, select a user, and then click the Edit icon.
4. On the User Detail dialog box, click **Manage Files**.  
The Manage Files for <User> window opens.
5. Navigate to the file.
6. Click the Previous Versions button.

If there are previous versions they appear in the listing that opens:

Name	Size	Modified	Created by	Actions
Current Version	21 KB	Feb 16, 2024 02:30 PM	Created by alex	
Version 1	21 KB	Feb 16, 2024 02:22 PM	Created by alex	

**To remove all old versions of a file:**

1. Open a browser and log on to the admin portal.
2. From the left navigation menu, select **Users**.
3. On the Manage Users page, select a user, and then click the Edit icon.
4. On the User Detail dialog box, click **Manage Files**.  
The Manage Files for <User> window opens.
5. Navigate to the file.
6. Click the Remove All Old Versions icon.



7. In the **Confirm** dialog box, click **OK**.  
All old versions of the file are deleted.

## Remove Incomplete User Uploads



This action:

- Is recorded in the Audit log as: "Action performed by ADMIN"
- CANNOT be undone

As an administrator, you can remove files that were not completely uploaded. This can free up storage space.

If a user tries to upload a file and for some reason the action is only partially completed, the file is saved in a folder for partial uploads.

- Partial uploads are saved in case a network connection is lost and the user wants to continue the upload when connectivity is restored.
- Incomplete user uploads are never shown in the Manage Files listing.
- Over a period of time, these partial uploads can occupy lots of space.
- Admins can easily remove these partial uploads with the click of one button.

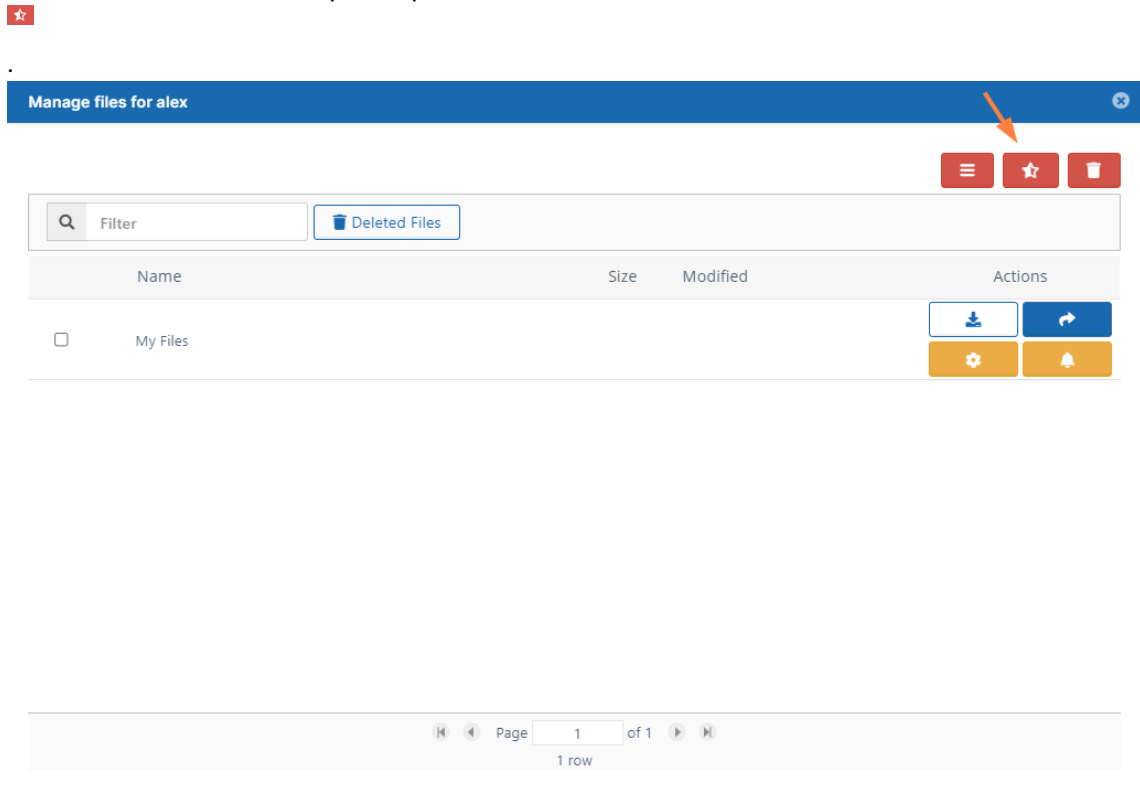
💡 If a file upload is in progress:

- It will not be removed, even if it only partially uploads, unless you use the In-transit option when removing partial uploads
- You can use the In-transit option to cancel a partial upload in progress

### Cancel a Partial Upload

#### To remove all incomplete user uploads:

1. Open a browser and log in to the admin portal.
2. From the left navigation menu, select **Users**.
3. On the **Manage Users** page, select a user, and then click the Edit icon.
4. In the **User Detail** dialog box, click **Manage Files**.  
The **Manage Files for <User> window opens**.
5. Click the Remove All Incomplete Uploads icon



6. On the **Incomplete Files** dialog box, to also remove incomplete uploads in progress, select Include in-transit.
7. Click **OK**.  
Incomplete downloads are removed.

## Restore a Previous File Version

If a user has uploaded changes to a file, you can restore the previous version of a file and make it live.

**To restore a previous version of a user's file:**

1. Open a browser and log on to the Admin Portal.
2. From the left navigation menu, select **Users**.
3. On the **Manage Users** page, select a user, and then click the edit icon .
4. On the **User Detail** dialog box, click **Manage Files**.  
The **Manage Files for <User>** window opens.
5. Navigate to the file.
6. To see a list of earlier versions, click the Version icon.

Manage files for jenniferp ✕

[/jenniferp/Admin hold](#) ☰ ☆ 🗑








← Up
🔍 Filter
🗑 Deleted Files
📄 Copy
🔄 Rename
📁 Move
✕ Delete

	Name	Size	Modified	Actions
<input type="checkbox"/>	AccountNames.txt	60 B	Feb 20, 2024 1:14 PM	<div style="display: flex; flex-direction: column; gap: 5px;"> <span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="border: 1px solid #ccc; padding: 2px;">☰</span> <span style="border: 1px solid #ccc; padding: 2px;">🔔</span> </div>
<input type="checkbox"/>	big_buck_bunny.mp4	5.26 MB	Sep 15, 2017 2:25 AM	<div style="display: flex; flex-direction: column; gap: 5px;"> <span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="border: 1px solid #ccc; padding: 2px;">☰</span> <span style="border: 1px solid #ccc; padding: 2px;">🔔</span> </div>
<input type="checkbox"/>	vacination #5 report.pdf	140 KB	Aug 26, 2022 5:16 AM	<div style="display: flex; flex-direction: column; gap: 5px;"> <span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="border: 1px solid #ccc; padding: 2px;">☰</span> <span style="border: 1px solid #ccc; padding: 2px;">🔔</span> </div>
<input type="checkbox"/>	Ã·Ã·Ã·Ã·N.txt	0 B	Jun 16, 2016 11:54 AM	<div style="display: flex; flex-direction: column; gap: 5px;"> <span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="border: 1px solid #ccc; padding: 2px;">☰</span> <span style="border: 1px solid #ccc; padding: 2px;">🔔</span> </div>

⏪ ⏩ Page  of 1 ⏪ ⏩  
 4 rows

7. Select the version that you want to make live, and click the **Make this version live** icon .

Previous Versions✕

Current Version	60 B	Feb 20, 2024 01:14 PM	Created by jenniferp	
Version 2	29 B	Feb 20, 2024 01:13 PM	Created by jenniferp	Feb 20, 2024 01:14 PM   
Version 1	18 B	Jan 09, 2024 01:37 PM	Created by jenniferp	Feb 20, 2024 01:13 PM   

Close

⏪ ⏩ Page  of 1 ⏪ ⏩  
 4 rows

The following confirmation box appears.

Confirm✕

Selected version will be made the live version.

Note that the current version will be versioned or removed depending upon your versioning settings. Continue?

OK
Cancel



In versions of FileCloud prior to 20.2, current versions are always removed when another version is restored. Beginning with Version 20.2, by default, the current version is saved when another version is restored.

8. Click **OK**. A message telling you that the selected version has been made live appears. If the current version remains, it becomes the version directly preceding the current one.

Previous Versions						
<b>Previously Version 1</b>						
Current Version	18 B	Jan 09, 2024 01:37 PM	Created by jenniferp			
<b>Previously Current Version</b>						
Version 2	60 B	Feb 20, 2024 01:14 PM	Created by jenniferp	Feb 20, 2024 01:20 PM		
Version 1	29 B	Feb 20, 2024 01:13 PM	Created by jenniferp	Feb 20, 2024 01:14 PM		

## Change the Name of the Zip File for Multiple File Downloads

When multiple files and folders are downloaded from FileCloud, they are downloaded as a zip file with the name **<Service Name>-<download datetime>**. In addition to the downloaded files and folder, the zip file contains a text file named **downloadzip.log** which includes the line **Generated by <Service Name>**.

**Service Name** is used to refer to your FileCloud server throughout your system, on the user interface and in email messages and other notifications as well as in the download zip file name. By default, its value is FileCloud.

### To change the Service Name:

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

the **Settings** navigation page, click **Server** .  
The **Server** settings page opens.

## Server

[Reset to defaults](#)

**Service Name**  
Name to use to refer to the service

FileCloud

**Service URL**  
URL that accesses the service

https://  [Check URL](#)

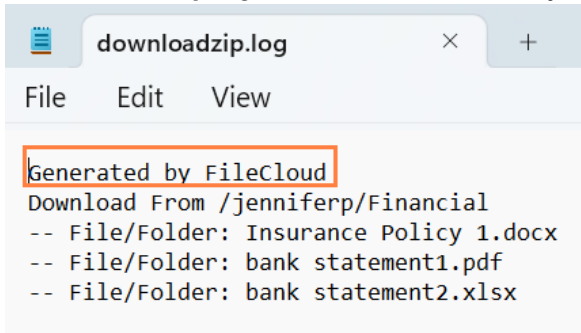
**Session Timeout (Minutes)**  
User portal login session timeout.  
Example: 15 (default) = 15 minutes; 30 = 30 minutes; 60 = 1 hour  
Note: Session always expires when browser is closed unless advanced configuration is added.

15

At this point, if a user downloads multiple files at the same time, the zip file has a name similar to:

filecloud-20231101141022.zip

and **downloadzip.log** has the line **Generated by FileCloud**:



```

downloadzip.log
File Edit View
Generated by FileCloud
Download From /jenniferp/Financial
-- File/Folder: Insurance Policy 1.docx
-- File/Folder: bank statement1.pdf
-- File/Folder: bank statement2.xlsx

```

2. Change the value in **Service Name** to your own name for your server:

## Server


[Reset to defaults](#)

Service Name

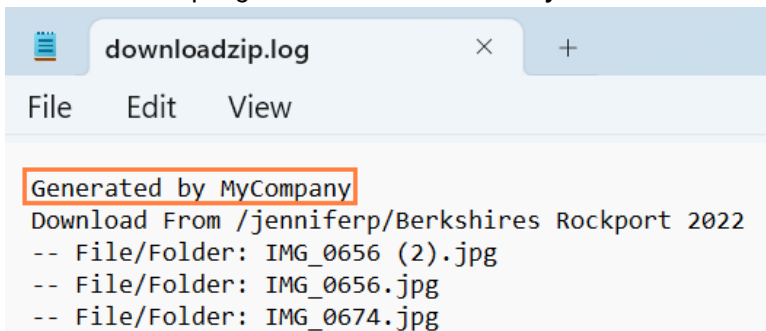
Name to use to refer to the service

MyCompany

Now, if a user downloads multiple files at the same time, the zip file include the new **Service Name** instead of **FileCloud**:

 mycompany-20231102103734.zip

and **downloadzip.log** has the line **Generated by <new Service Name>**:




```

downloadzip.log
File Edit View
Generated by MyCompany
Download From /jenniferp/Berkshires Rockport 2022
-- File/Folder: IMG_0656 (2).jpg
-- File/Folder: IMG_0656.jpg
-- File/Folder: IMG_0674.jpg


```

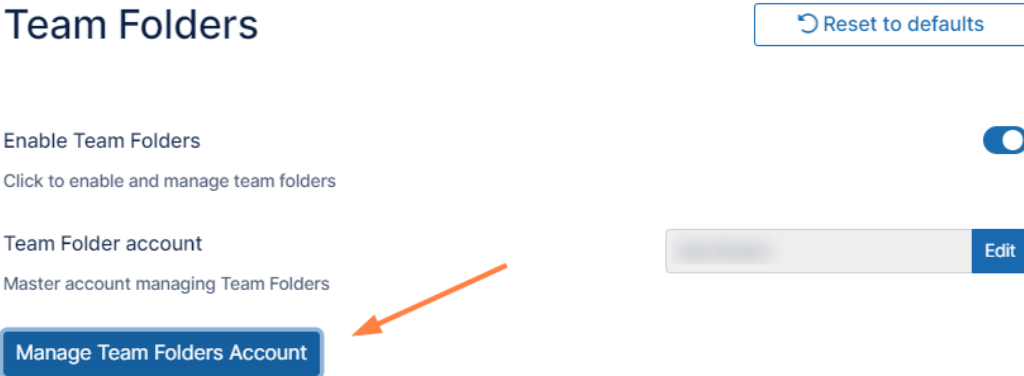
# Managing Team Folders

 Beginning in FileCloud 23.242, you can manage and view details of Team Folders through the Team Folder Account Details dialog box.

To access the **Team Folder Account Details**, you must have already set up your Team Folders account. If you have not set it up yet, see [Configure the Team Folders Account](#).

## To manage and view details of Team Folders:

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 **Team Folders** settings page opens.



**Team Folders** Reset to defaults

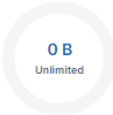
Enable Team Folders Toggle On  
Click to enable and manage team folders

Team Folder account Edit  
Master account managing Team Folders


**Manage Team Folders Account**

2. To see details of the Team Folders account, click **Manage Team Folders Account**. The Team Folder Account Details dialog box opens. The dialog box gives you account and data information, and enables you to manage Team Folder shares and notifications, reset the Team Folder account password, edit some account fields, and perform other Team Folder actions.

**Team Folder Account Details** ✕

<b>Account Info</b> Name: [Redacted] Email: [Redacted] Last Login: -- TOS Date: Not Accepted	<b>Data Storage</b>  Quota Usage 898.2 MB Used Unlimited Total <a href="#">View Details</a>
--	--

[Manage Shares](#) [Reset Password](#) [Manage Notifications](#) [Delete Account](#)

**Customization**  


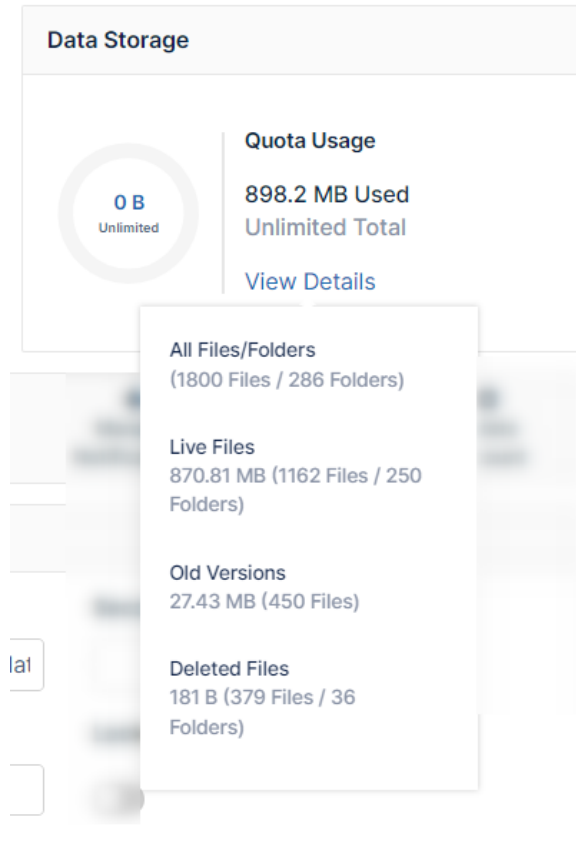
<b>Email</b> [Redacted]	<b>Secondary Email</b> [Empty]
<b>Display Name</b> Team Folders	<b>Lock Account</b> <input type="checkbox"/>
<b>Creation Source</b> Default	<b>Phone Number</b> +1

[Save](#) [Close](#)

## To view the breakdown of data in Team Folders:

In the Data Storage section, click **View Details**.

You are shown a breakdown of the files and folders by live versions, old versions, and deleted files.




## To edit the Team Folders account fields:

In the customization section, click the image, to upload a photo or graphic, or modify the **Email**, **Secondary Email**, **Display Name**, **Creation Source**, or **Phone Number** fields and click **Save** to save your changes.

**Lock Account** is automatically checked when too many login errors occur. Click to remove the check

and unlock the account.

Customization

	<b>Email</b>	<input type="text"/>	<b>Secondary Email</b>	<input type="text"/>
	<b>Display Name</b>	<input type="text" value="Team Folders"/>	<b>Lock Account</b>	<input type="checkbox"/>
	<b>Creation Source</b>	<input type="text" value="Default"/>	<b>Phone Number</b>	<input type="text" value="+1"/>

Save


Close

## To lock the Team Folder account:

The **Lock Account** field is automatically enabled when the account is locked.

Unlock the account by clicking the enabled **Lock Account** control so that it appears disabled.

Customization

	<b>Email</b>	<input type="text"/>	<b>Secondary Email</b>	<input type="text"/>
	<b>Display Name</b>	<input type="text" value="Team Folders"/>	<b>Lock Account</b>	<input checked="" type="checkbox"/>
	<b>Creation Source</b>	<input type="text" value="Default"/>	<b>Phone Number</b>	<input type="text" value="+1"/>

Save

Close

## To manage Team Folder shares:

1. Click **Manage Shares**.

Team Folder Account Details

Account Info	Data Storage
Name: dev1team	<b>Quota Usage</b> 898.2 MB Used Unlimited Total <a href="#">View Details</a>
Email: [blurred]	
Last Login: --	
TOS Date: Not Accepted	






0 B Unlimited

Manage Shares    Reset Password    Manage Notifications    Delete Account

A list of your Team Folder shares opens.

2. Click the edit icon to modify the options or permissions of a share.
3. Click the x icon to remove a share.

**Manage Shares for Team Folders** ✕

Path	Type	Created Date	Actions
/ [redacted] /acl2	Private	Feb 20, 2025 4:15 AM	 
/ [redacted] /chris	Private	Feb 18, 2025 5:49 AM	 
/ [redacted] /Human Resources/Employee Records	Private	Jan 28, 2025 2:10 PM	 
/ [redacted] /First/Deletefolder	Private	Jan 15, 2025 3:29 AM	 
/ [redacted] /Test	Private	Nov 8, 2024 3:42 AM	 
/ [redacted] /Accounting33/grfsv/c9b07cf2-f2d1-436c-8986-c2107f08740b.pdf.pdf	Password Protected	Oct 8, 2024 11:39 AM	 
/ [redacted] /test-reshare/test-folder	Private	Sep 16, 2024 10:27 AM	 

**To reset the Team Folder account password:**

- 1. Click **Reset Password**.

**Team Folder Account Details** ✕

Account Info	Data Storage
<p><b>Name:</b> dev1team</p> <p><b>Email:</b> [REDACTED]</p> <p><b>Last Login:</b> --</p> <p><b>TOS Date:</b> Not Accepted</p>	<p><b>Quota Usage</b></p> <p>0 B Unlimited</p> <p>898.2 MB Used Unlimited Total</p> <p><a href="#">View Details</a></p>

[Manage Shares](#) [Reset Password](#) [Manage Notifications](#) [Delete Account](#)

2. Enter and re-enter a new password, and click **Save**.

**Reset Password** ✕

**Password**

**Confirm Password**

**Save** **Cancel**

## To manage Team Folder notifications

1. Click **Manage Notifications**.

Team Folder Account Details ✕

Account Info	Data Storage
<p><b>Name:</b> team folder account</p> <p><b>Email:</b> team@example.com</p> <p><b>Last Login:</b> 21 Mar 2025 08:54</p> <p><b>TOS Date:</b> Not Accepted</p>	<div style="display: flex; align-items: center;"> <div style="text-align: center; margin-right: 10px;"> <div style="border: 1px solid #ccc; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center;"> <span style="font-size: 24px; font-weight: bold;">0 B</span>  <small>Unlimited</small> </div> </div> <div> <p><b>Quota Usage</b></p> <p>0 B Used Unlimited Total</p> <p><a href="#">View Details</a></p> </div> </div>
<div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; text-align: center; width: 20%;"> <span style="font-size: 12px;">Manage Shares</span> </div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center; width: 20%;"> <span style="font-size: 12px;">Reset Password</span> </div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center; width: 20%; border: 2px solid #007bff;"> <span style="font-size: 12px;">Manage Notifications</span> </div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center; width: 20%;"> <span style="font-size: 12px;">Delete Account</span> </div> </div>	

A list of any notifications set up for Team Folder paths appears.

Manage Notifications for Team Folders ✕

Path	Modified Date	User	Actions
/team folder account/Human Resources	Mar 21, 2025 8:57 AM	team folder account	<span style="font-size: 18px; margin-right: 10px;">✎</span> <span style="font-size: 18px;">✕</span>

<< < Page 1 of 1 > >>

Close

- Click the Edit icon to change a notification's settings, or click the delete icon to delete the notification.

## To delete the Team Folder account:

- ✕ Check which files and folders will be deleted before you delete your Team Folder account. Deleting the account causes the following to be permanently deleted:

- All files and folders you have stored and shared with users in Team Folders
- Any files or folders users have stored in Team Folders

1. Click **Delete Account**.

Team Folder Account Details

Account Info	Data Storage
<b>Name:</b> dev1team	<b>Quota Usage</b> 898.2 MB Used Unlimited Total <a href="#">View Details</a>
<b>Email:</b> [redacted]	
<b>Last Login:</b> --	
<b>TOS Date:</b> Not Accepted	

Manage Shares    Reset Password    Manage Notifications    **Delete Account**

2. To confirm that you want to delete the Team Folder account, enter **DELETE** (or the word you are instructed to type). Then click **Delete**.

Delete Account

Are you sure you want to delete this account?

This is a team folder account. Deleting this account will delete all file(s) and folder(s) under team folders, which is a common place where all users can store and organize files. This action cannot be undone.

Type **DELETE** to proceed

Delete    Cancel

## Search for a Team Folder

**i** The ability to search for a specific Team Folder is available in FileCloud Server version 19.1 and later.

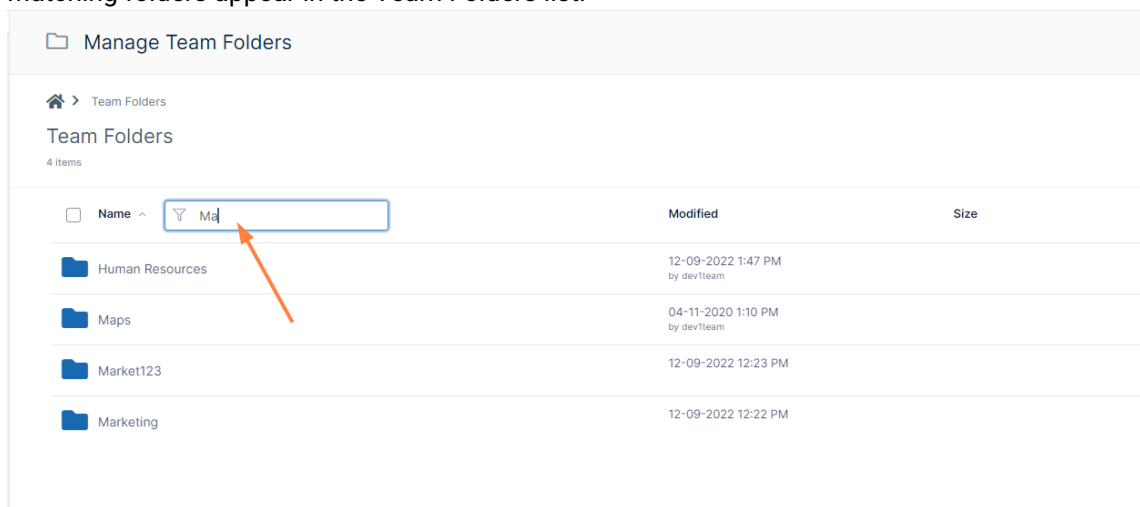
If you manage so many Team Folders that you have to look through multiple pages of folder listings to find a Team Folder, you can use the search box to find the folder you need quickly.

- In some cases, enterprises might see multiple pages of team folders
- To help you filter the Team Folder list, a search box allows you to filter the list of folders on the Manage Team Folders page.
- You can also locate files by clicking the **Name**, **Size**, and **Modified** columns to sort on them.

### To search for a Team Folder:

1. Open a browser and log on to the *Admin Portal*.
2. From the left navigation menu, under *MANAGE*, select *Team Folders*.
3. On the *Manage Team Folders* page, In the *Filter* box, type in the name of your folder or part of the name, and press **ENTER**.

Matching folders appear in the Team Folders list.



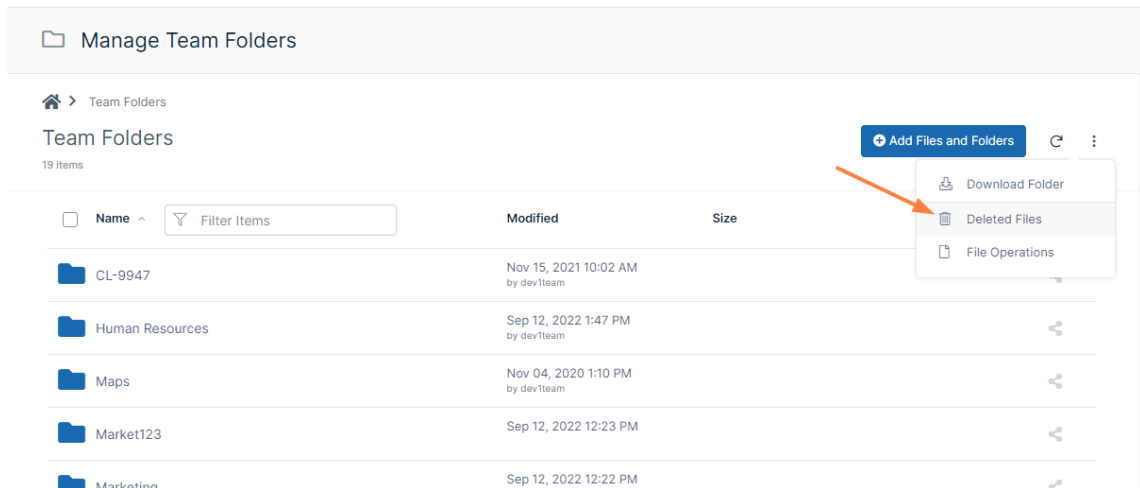
## Recover Deleted Files

**i** The **Restore** button for deleted files and folders in Team Folders is available in FileCloud version 22.1 and later.  
The ability to recover deleted files and folders in a Team Folder is available in FileCloud version 17.3 and later.

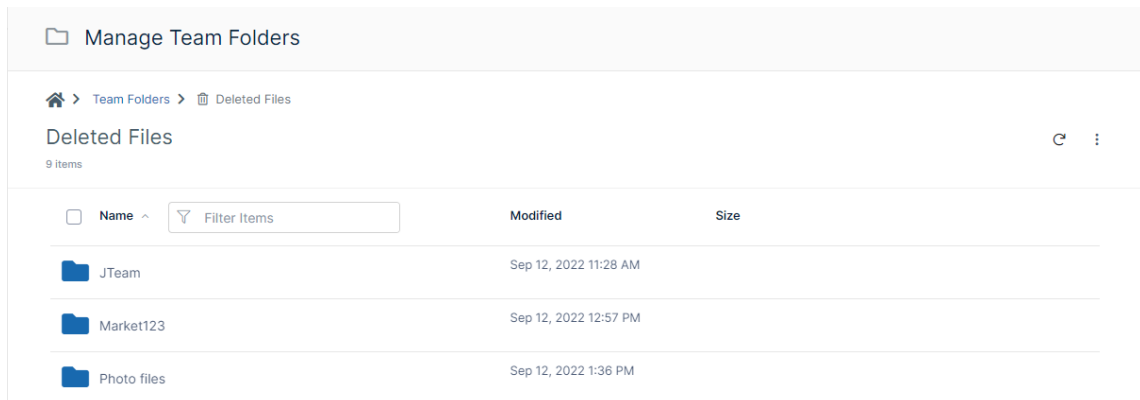
After you delete files and folders, they are placed in the Team Folder's recycle bin so that they can be recovered if deleted by mistake or are needed again at a later time.

### To recover a deleted folder or file:

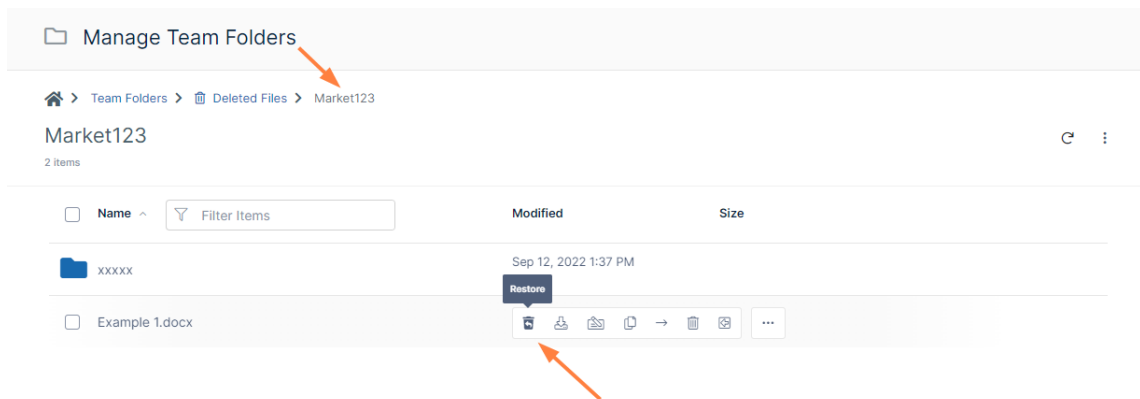
1. Open a browser and log in to the admin portal.
2. In the navigation panel, click **Team Folders**.
3. To open the **Deleted Files** page, in the upper-right corner, click the more icon and choose **Deleted Files**.



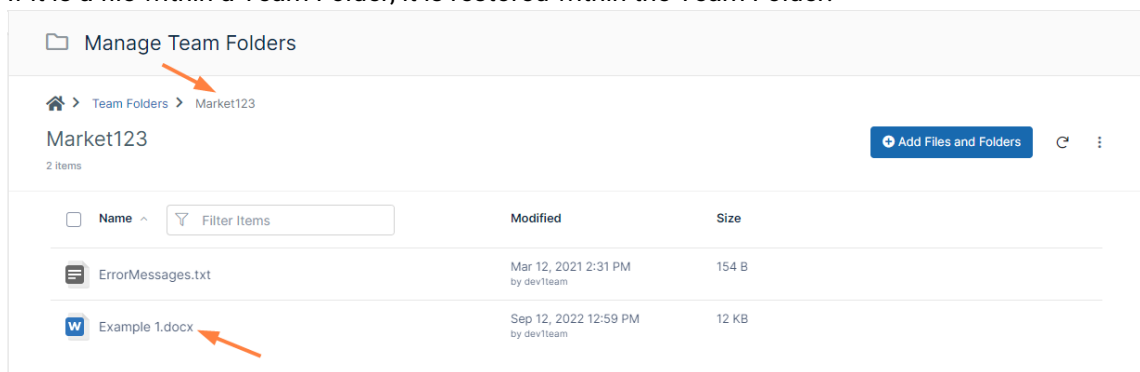
The **Deleted Files** screen opens. The top level of folders includes deleted team folders as well as non-deleted parent team folders of deleted files. For example, in the following screenshot, the **JTeam** and **Photo files** team folders are deleted team folders, but the **Market123** team folder is a non-deleted team folder that contains deleted files.



4. Navigate to the folder or file you want to recover.
5. Hover over the folder or file, and click the **Restore** button.



6. The file or folder is restored. If it is a Team Folder, it is restored to the top level of Team Folders. If it is a file within a Team Folder, it is restored within the Team Folder.



## View and Restore Previous Versions in Team Folders



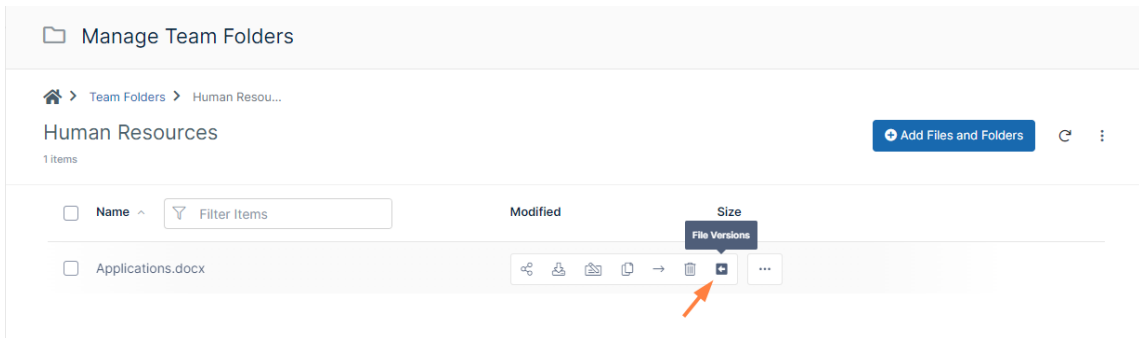
The ability to restore a previous version of a file in Team Folders is available in FileCloud Server version 18.2 and later.

If you need to revert changes made to a file, you can restore the previous version and make it live.

### To restore a previous version of a file in Team Folders:

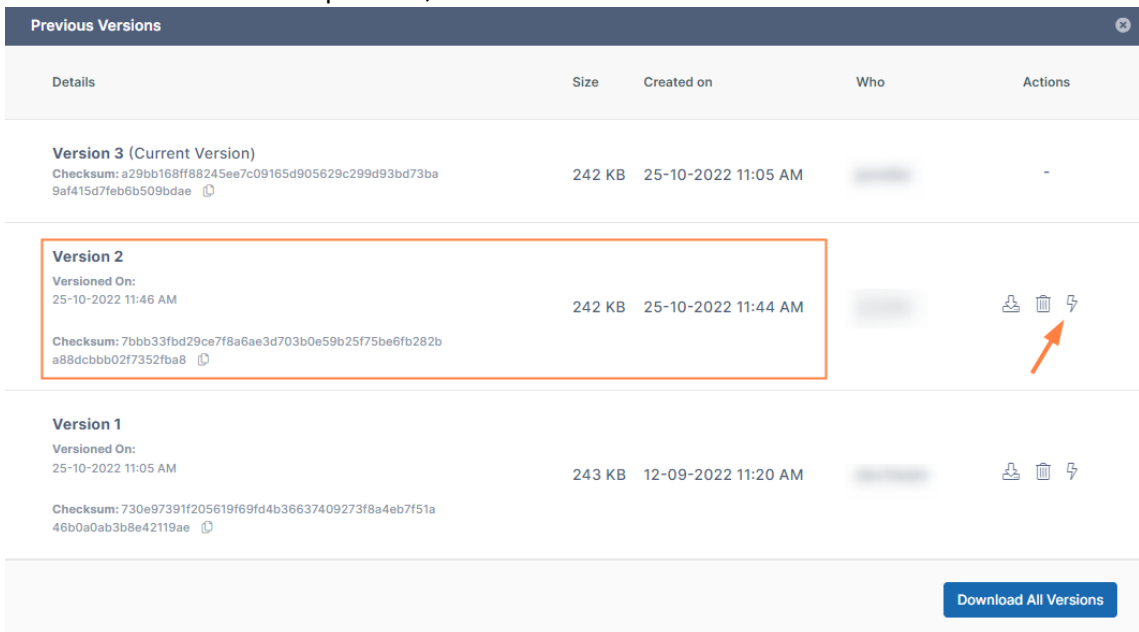
1. Open a browser and log in to the admin portal.
2. In the navigation pane, select **Team Folders**.
3. On the **Manage Team Folders** page, navigate to the file you want to revert to a previous version.

4. Click the version icon.

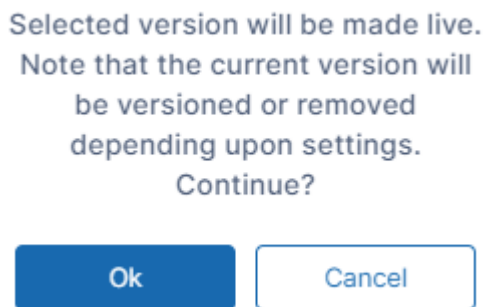


A list of the previous versions opens.

5. Across from the version to promote, click the **Make as Current Version** icon.



The following confirmation box appears:



6. Click **OK**.

The version that was made the current version now appears at the top, and the previous current version appears under it.

(Note that above, the 11:44 AM version was Version 2, but below, after it was made the current

version, it is Version 3 at the top of the list.)

Previous Versions				
Details	Size	Created on	Who	Actions
<b>Version 3 (Current Version)</b> Checksum: 7bbb33fbd29ce7f8a6ae3d703b0e59b25f75be6fb282b a88dcbbb02f7352fba8	242 KB	25-10-2022 11:44 AM		-
<b>Version 2</b> Versioned On: 25-10-2022 11:50 AM  Checksum: a29bb168ff88245ee7c09165d905629c299d93bd73ba 9af415d7feb6b509bdae	242 KB	25-10-2022 11:05 AM		
<b>Version 1</b> Versioned On: 25-10-2022 11:05 AM  Checksum: 730e97391f205619f69fd4b36637409273f8a4eb7f51a 46b0a0ab3b8e42119ae	243 KB	12-09-2022 11:20 AM		

[Download All Versions](#)

In versions of FileCloud prior to 20.2, current versions are always removed when another version is restored. Beginning with Version 20.2, by default, the current version is saved when another version is restored.

To view and restore previous versions of files in the user portal, see [View Previous Versions Of Files](#)

## Managing User Shares

All Folder and File shares of FileCloud Users can be managed by the FileCloud Administrator.

The Administrator is able to view, modify or remove shares done by users of the system.

The admin can open either an individual user's list of shares from the **User Details** dialog box or a list of all shares by all users in the system through the **User Shares** screen.

The admin can also export a file listing all shares and their details from the **User Shares** screen.


To set up file sharing, see Share Settings.


### To manage user shares for an individual user:


1. Log on to Administration Panel
2. Click **Users** on the left navigation panel, then click the **Edit** icon for a user, and click **Manage Shares** in the **User Details** dialog box.


✕
**User Details**


Name	jessica	Total Quota	Unlimited
Email	[Redacted]	Used Quota	59.2 MB
Last Login	16 Jun 2022 14:50	Available Quota	0 B
TOS Date	Not Accepted	Used Storage	59.2 MB
Group	<a href="#" style="background-color: #0056b3; color: white; padding: 5px 10px; text-decoration: none;">Manage</a>	<a href="#" style="background-color: #00bcd4; color: white; padding: 5px 10px; text-decoration: none;">More ▾</a>	


  
Manage Files


  
Manage Policy


  
Manage Shares


  
Mobile Devices

  
Reset Password


  
Send Email



  
Manage Notifications

  
Manage Backups

  
Delete Account

Profile Image



 Update
 Remove





Access Level: Full ▾

Authentication: Default ▾

Save
Close

- A **Manage shares for [user]** dialog box opens.
- 3. Click the Edit icon next to a share to open it.

✕
**Manage shares for jessica**

Location	Type	Created Date	Actions
/jessica/Internal documents/IMG_20190627_205123685.jpg	Private	Jun 9, 2022 9:41 AM	 
/jessica/Internal documents	Private	Jun 9, 2022 9:30 AM	 

The **Manage Share** dialog box opens.

4. Make any changes to the share.

## To manage user shares for all users:

1. Log on to Administration Panel.
2. Click **User Shares** in the navigation panel.  
The **Manage User Shares** screen opens.
3. Click the Edit icon next to a share to open it.

User name	Location	Type	Created Date	Actions
jennifer	/jennifer/Annuity template.docx	Public	Aug 5, 2022 2:24 PM	[Edit] [X]
jennifer	/jennifer/Common files/Alt Img Tags - ITAR copy.docx	Public	Aug 5, 2022 2:21 PM	[Edit] [X]
jennifer	/jennifer/Common files/075b2598e4b748f5972e98b1250a6421.jpeg	Private	Aug 5, 2022 1:02 PM	[Edit] [X]
artur	/artur/test	Private	Jul 19, 2022 12:02 PM	[Edit] [X]

4. The **Manage Share** dialog box opens.
5. Make any changes to the share.

**Manage Share for file - 075b2598e4b748f5972e98b1250a6421.jpeg**

Share URL:

**Share Options**

Share Owner:

Shared File/Folder:

Share Name:

Expires (Optional):  Never Expires  Expires

Email File Change Notifications:  Yes  No

**Share Permissions**

Allow Everyone with Link  
 Allow Selected Users/Groups

**Guest** 1 Group

User	Allow View	Allow Download	Allow Upload	Allow Share	Misc
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Page 1 of 1

## To export a list of all shares:

1. Log on to Administration Panel.
2. Click **User Shares** in the navigation panel.  
The **Manage User Shares** screen opens.
3. Click **Export**.

**Manage User Shares**

Filter:  Show 10 Items

User name	Location	Type	Created Date	Actions
jennifer	/jennifer/Annuity template.docx	Public	Aug 5, 2022 2:24 PM	<input type="checkbox"/> <input type="checkbox"/>
jennifer	/jennifer/Common files/Alt Img Tags - ITAR copy.docx	Public	Aug 5, 2022 2:21 PM	<input type="checkbox"/> <input type="checkbox"/>
jennifer	/jennifer/Common files/075b2598e4b748f5972e98b1250a6421.jpeg	Private	Aug 5, 2022 1:02 PM	<input type="checkbox"/> <input type="checkbox"/>
artur	/artur/test	Private	Jul 19, 2022 12:02 PM	<input type="checkbox"/> <input type="checkbox"/>

A csv file named **shares** is exported with the following fields:

	A	B	C	D	E	F	G	H	I
1	UserName	Share Location	TYPE	Created Date	Expiry Date	Users	Groups		
2	jennifer	/jennifer/Annuity ter	Public	8/5/2022 14:24	8/31/2022 0:00				
3	jennifer	/jennifer/Common fi	Public	8/5/2022 14:21					
4	jennifer	/jennifer/Common fi	Private	8/5/2022 13:02		No Users	No Groups		
5	artur	/artur/test	Private	7/19/2022 12:02			No Groups		

## Transfer Ownership of a Reshare from a Team Folder or Network Share





















In FileCloud version 20.3 and later, administrators have the ability to change the owner of a reshare from a Team Folder or a Network Share.

Reshared content from Team Folders and Network Shares is content that a user already has access to and has shared with another user.

In the **Manage User Shares** dialog box, its root is **/EXTERNAL** or **/SHARED**.

To change the owner of a reshare

1. Follow the steps in [Managing User Shares](#) to open the list of shares.
2. To open the **Manage Share for File** dialog box, click the Edit button for a Team Folder share or a Network Share.

Manage User Shares					
Filter		Filter by Username, Location or Sharename		Show 10 Items	Export
User name	Location	Type	Created Date	Actions	
jenniferp	/EXTERNAL/Misc/ASBeach.jfif	Private	Jan 14, 2021 7:26 AM	 	
gabrielled	/SHARED/team folder admin/Human Resources/FCSwitchToClassic.png	Private	Jan 14, 2021 7:22 AM	 	
team folder admin	/team folder admin/Human Resources/FCSwitchToClassic.png	Private	Jan 14, 2021 7:18 AM	 	
jenniferp	/jenniferp/DI 19-20	Private	Jan 13, 2021 3:36 PM	 	
jenniferp	/jenniferp/Accounts	Public	Jan 13, 2021 3:35 PM	 	
jenniferp	/jenniferp/For Review	Public	Jan 12, 2021 2:45 PM	 	
jenniferp	/jenniferp	Public	Jan 12, 2021 2:39 PM	 	
jenniferp	/jenniferp/FCAddToFavorites.png	Private	Jan 12, 2021 2:18 PM	 	
team folder admin	/team folder admin/Other Departments	Public	Jan 12, 2021 9:58 AM	 	
team folder admin	/team folder admin/Marketing	Private	Jan 12, 2021 8:45 AM	 	

Page 1 of 4  
32 rows

3. In the **Manage Share for file** or **Manage Share for folder** dialog box, type in the user name of a new **Share Owner**, and click **Update**.

Manage Share for file - FCSwitchToClassic.png ✕

Share URL  📄 📁 📝 ☰ ✉

**Share Options**

Share Owner  ↗

Shared File/Folder

Share Name

Expires (Optional)  
 Never Expires  Expires

Email File Change Notifications  
 Yes  No

**Update**

**Share Permissions**

Allow Everyone  
 Allow Selected Users/Groups

**Users** | Group

Invite Users

User	Allow View	Allow Download	Allow Upload	Allow Share	Misc
No users selected. Click 'Invite User' to select user(s).					

Unsaved changes. Click 'Update' to save.

Remove Share
✕ Close

4. Click **Close**.  
Now the listing for the share shows the new owner.

**Manage User Shares** 🔔

Filter  Show 10 Items 📄 Export

User name	Location	Type	Created Date	Actions
jenniferp	/INTERNAL/Misc/ASBeach.jfif	Private	Jan 14, 2021 7:26 AM	<span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="background-color: #c00000; color: white; padding: 2px;">✕</span>
jenniferp	/SHARED/team folder admin/Human Resources/FCSwitchToClassic.png	Private	Jan 14, 2021 7:22 AM	<span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="background-color: #c00000; color: white; padding: 2px;">✕</span>
team folder admin	/team folder admin/Human Resources/FCSwitchToClassic.png	Private	Jan 14, 2021 7:18 AM	<span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="background-color: #c00000; color: white; padding: 2px;">✕</span>
jenniferp	/jenniferp/DI 19-20	Private	Jan 13, 2021 3:36 PM	<span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="background-color: #c00000; color: white; padding: 2px;">✕</span>
jenniferp	/jenniferp/Accounts	Public	Jan 13, 2021 3:35 PM	<span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="background-color: #c00000; color: white; padding: 2px;">✕</span>
jenniferp	/jenniferp/For Review	Public	Jan 12, 2021 2:45 PM	<span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="background-color: #c00000; color: white; padding: 2px;">✕</span>
jenniferp	/jenniferp	Public	Jan 12, 2021 2:39 PM	<span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="background-color: #c00000; color: white; padding: 2px;">✕</span>
jenniferp	/jenniferp/FCAddToFavorites.png	Private	Jan 12, 2021 2:18 PM	<span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="background-color: #c00000; color: white; padding: 2px;">✕</span>
team folder admin	/team folder admin/Other Departments	Public	Jan 12, 2021 9:58 AM	<span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="background-color: #c00000; color: white; padding: 2px;">✕</span>
team folder admin	/team folder admin/Marketing	Private	Jan 12, 2021 8:45 AM	<span style="border: 1px solid #ccc; padding: 2px;">📄</span> <span style="background-color: #c00000; color: white; padding: 2px;">✕</span>

Page 1 of 4 🔍  
32 rows

## Creating direct file download link from a public file share

### Creating direct download link for public shares

Public file shares by default opens a landing page, from where user can download the shared file. Sometimes it is preferable to have a direct downloadable links. By making minor changes to the share link, a direct downloadable link can be created.

By default the public share link looks like this:

```
https://abc.company.com/ui/core/index.html?mode=single&path=/SHARED/tester/MMQj5gqRymicnDib
```

In the above link, replace the string "**ui/core/index.html?mode=single&**" with "**app/websharepro/share?**" to the URL and remove the mode parameter.

Making these two changes the above link becomes:

```
https://abc.company.com/app/websharepro/share?path=/SHARED/tester/MMQj5gqRymicnDib"
```

Now, this link can be used to download the files directly from browser, download managers or Linux utilities such as wget.

## Creating direct file download links from a public folder share

Public folder shares provide a share link that opens a page listing the contents of the folder. By making minor changes to the share link, a direct downloadable link for any file in the folder can be created.

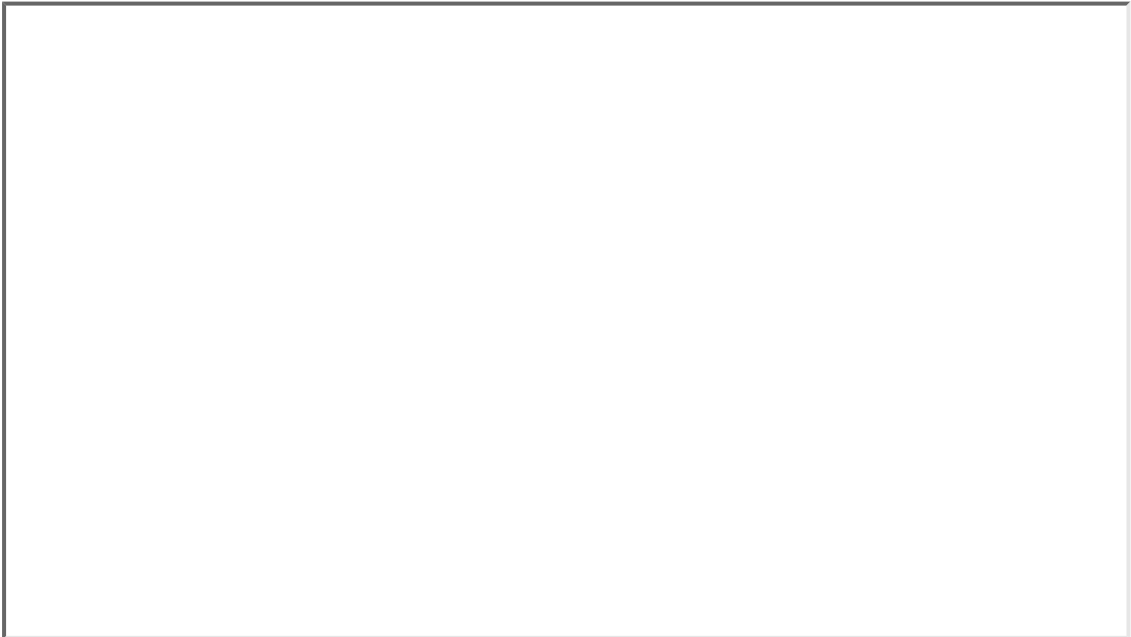
After you create the share, copy the share link and modify it to link to a download page for a file in the folder. Then send the new link to share users.

The procedure for creating direct file download links is the same from public folder shares of folders in My Files and folders in Team Folders.

### To copy the share link:

1. Hover over the folder and click the share icon.

2. In the **Share link for folder** dialog box, click the **Copy link to clipboard** button.  
If you open the link in a browser, FileCloud displays the folder's contents.  
The following video shows you the process.



### **To create a direct link to a file in the shared folder:**

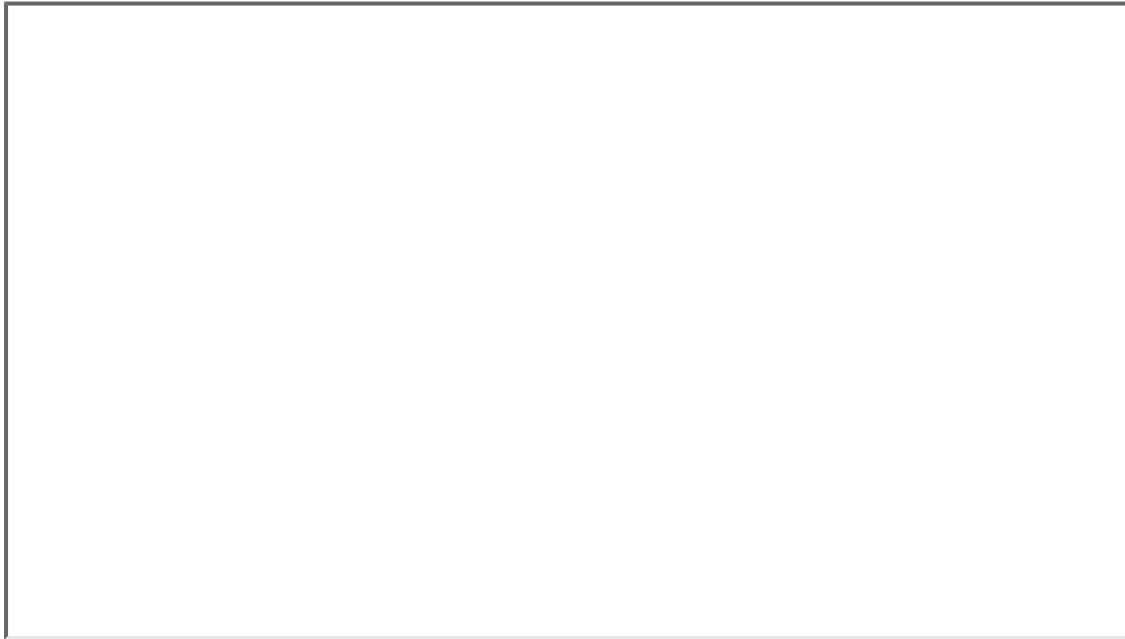
In our example, the link to the shared folder is:

<http://127.0.0.1/ui/core/index.html?mode=public&shareto=#expl-tab1./SHARED/!bli3S5C0tloHQD49yINBKMS5/XOOclSQ2AAAdiOWP1>

We would like the link to open a download page for the file customers.docx, which is located in the folder.

This video shows you the steps, which are also listed below.

Copy the link to a text editor in order to modify it.



1. Remove the portion of the URL that takes you to the FileCloud page, and replace it with a path to a download page.  
(Remove [/ui/core/index.html?mode=public&shareto=#expl-tabl](#) and replace it with [core/downloadfile](#).)
2. Add a **filepath** parameter after [core/downloadfile](#) and set it equal to the [/SHARED/](#) portion of the path. Then add the filename, [customers.docx](#), to the end of the path.  
(At this point, the path is [http://127.0.0.1/core/downloadfile?filepath=/SHARED/!bli3S5C0tloHQD49yINBKMS5/XOOclSQ2AAdiOWP1/customers.docx](#))
3. After the **filepath** parameter, add a **filename** parameter, and set it equal to [customers.docx](#).  
(The final link in the example looks like [http://127.0.0.1/core/downloadfile?filepath=/SHARED/!bli3S5C0tloHQD49yINBKMS5/XOOclSQ2AAdiOWP1/customers.docx&filename=customers.docx](#))
4. Send the link to share users. When clicked, it opens a download page for the [customers.docx](#) file.

### To create a direct link to a file in a sub-folder of the share:

If the file is embedded in a folder within the shared folder, make the same changes as above, but include the path to the file including the sub-path(s). For example if you are linking to the file **background.png** which is in the sub-folder **images** in the shared folder, the link should appear as:

[http://127.0.0.1/core/downloadfile?filepath=/SHARED/!bli3S5C0tloHQD49yINBKMS5/XOOclSQ2AAdiOWP1/images/background.png&filename=background.png](#)

### Sample links before and after

Link to the **customers.docx** file in the top-level of the shared My Files folder



Original link

<https://www.mycompany.com/ui/core/index.html?mode=public&shareto=#expl-tabl./SHARED!/bli3S5C0tloHQD49yINBKMS5/X00clSQ2AAdiOWP1>



Modified link

<https://www.mycompany.com/core/downloadfile?filepath=/SHARED!/bli3S5C0tloHQD49yINBKMS5/X00clSQ2AAdiOWP1/customers.docx&filename=customers.docx>

Link to the **background.png** file in the **images** folder in the shared My Files folder



Original link

<https://www.mycompany.com/ui/core/index.html?mode=public&shareto=#expl-tabl./SHARED!/bli3S5C0tloHQD49yINBKMS5/X00clSQ2AAdiOWP1>



Modified link

<https://www.mycompany.com/core/downloadfile?filepath=/SHARED!/bli3S5C0tloHQD49yINBKMS5/X00clSQ2AAdiOWP1/images/background.png&filename=background.png>

Link to the **Announcement.txt** file in the shared HR Misc folder of the Human Resources Team Folder (same format as link from My Files)



Original link

<https://www.mycompany.com/ui/core/index.html?mode=public&shareto=#expl-tabl./SHARED!/b0ipSLCEtKoRQT47yiNpKOSyi/dWPDFohwRljdOj7v>



Modified link

<https://www.mycompany.com/core/downloadfile?filepath=/SHARED!/b0ipSLCEtKoRQT47yiNpKOSyi/dWPDFohwRljdOj7v/Announcement.txt&filename=Announcement.txt>

# Managing Storage Space Usage

Administrators can configure settings to control the space needed to keep FileCloud Server sites running.

## Related topics

### **A User's Storage**

[Change the Storage Quota for a User or Group](#)

[Delete User Files and Folders](#)

[Clear a User's Recycle Bin](#)

[Remove a User's Incomplete Uploads](#)

[Remove Old File Versions](#)

### **All Managed Storage**

[Clear Deleted Files Automatically](#)

[All Managed Storage Options](#)

### **Protecting Your Storage**

[Set Up Encryption for Managed Storage](#)

## Managing User Locks

As an administrator, you can have full control over file locking:

- Decide whether you want to give users the ability to lock a folder or a file
- See a list of all locked files and folders system-wide
- Remove a lock on user's file or folder

💡 To learn more about managing locks, click on a subject:

### How Locking Works

Locking can be set on both files and folders and signifies that a user is actively working that file or folder.

- Locking has to be enabled by the Administrator before the user has the option to lock a file or folder.
- FileCloud LOCKING is designed to prevent opening/accessing files between DIFFERENT USER ACCOUNTS.
- If you access a file whose lock is owned by you, then the file access will be ALLOWED.

When a file or folder is locked:

- A lock icon will be shown in the file listing
- The owner of the lock will also be shown in the details panel on the right hand side
- The owner of the lock has full access to that file or folder and can modify it
- Administrators can always override a lock in the Admin Portal
- A lock can be set up to prevent other users from reading the file or seeing the folder contents.
- If read permissions are not allowed, then other users cannot download or view the locked file or folder

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

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


### Turn Off All File Locking

You can disable locking so that users are never given this option in the User Portal.

- This is a system-wide setting

- To release a lock on a single file or folder, see the topic for Releasing a Single Lock

### To disable locking:

1. In the FileCloud admin portal's left navigation bar, scroll down and click **Settings**. Then, on the **Settings** navigation page, click **Misc** . By default, **General** settings are opened.
2. Locate the setting **Disable locking**, and enable it.

## General ↻ Reset to defaults

---

**Server timezone**  
Specify a timezone from here - <http://www.php.net/manual/en/timezones.php> America/Chicago ▼

**Calendar Type**  
Note: Gregorian (English) should be changed in the drop-down to Gregorian (common) Gregorian (English) ▼

**Date format** MMM dd, yyyy (Jan 15, 2019) ▼

**Time format** h:mm A (2:20 PM) ▼

**Apply folder-level security**   
Apply folder-level security settings to share permissions.

**Enable interactive tour on first login**

**Disable Activity panel**   
In user portal, hide the Activity tab in the right panel.

**Disable right panel for External users**   
In user portal, hide the right panel if the user is an External user.

**Disable Metadata panel**   
In user portal, hide the Metadata tab in the right panel.



**Disable locking**

**Disable IP check**   
To avoid unwanted session termination, disable if users' IP address may change.






3. Click **Save**.

### How to View Which Files or Folders are Locked

Viewing a list of files and folders that are currently locked by FileCloud users helps you to manage locks.


 **Manage File/Folder Locks**
Clear All Locks


Filter

Path	Lock Date	Locked By	Expiration	Actions
/jenniferp/Test Word Doc.docx	Mar 10, 2020	jenniferp	NONE	
/elin frei/New Feature Spec.docx	Mar 10, 2020	elin frei	NONE	
/jenniferp/tutorial.docx	Mar 10, 2020	jenniferp	NONE	
/jenniferp/Sample-Public-Forum-Ballot-Blank.pdf	Mar 10, 2020	jenniferp	NONE	
/jenniferp/2020-02-24_09h48_07.png	Mar 10, 2020	jenniferp	NONE	

#### To view a list of locked files and folders:

1. Log on to admin portal.
2. From the left navigation pane, click **User Locks**.
3. On the **Manage File/Folder Locks** screen, view the list of all files and folders currently locked.

 You can use the **Filter** entry box to limit the list. To view only the locked files and folders, type in a string of characters. Only the files and folders that match the string will be displayed. To clear the filter, delete the string of characters from this box.

For example:


- You can filter the results by lock owner. To do this, type in the user account name.
- You can see all files that are locked in a particular folder. To do this, type in the name of the folder.

#### Release a Single Lock

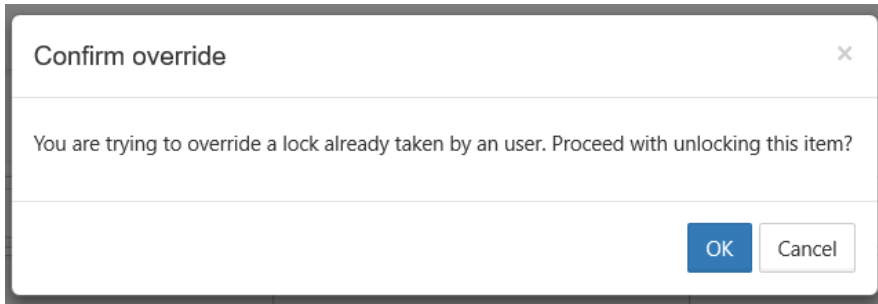
There are times when you may need to unlock a file for a user.

- A user no longer has a FileCloud account but has left a file locked
- A project folder can be used as a staging area that can be unlocked when the files are ready to be viewed
- Another user needs access to the file and the lock owner cannot be reached
- No one remembers why the file is locked

#### To release the lock on a single file or folder:

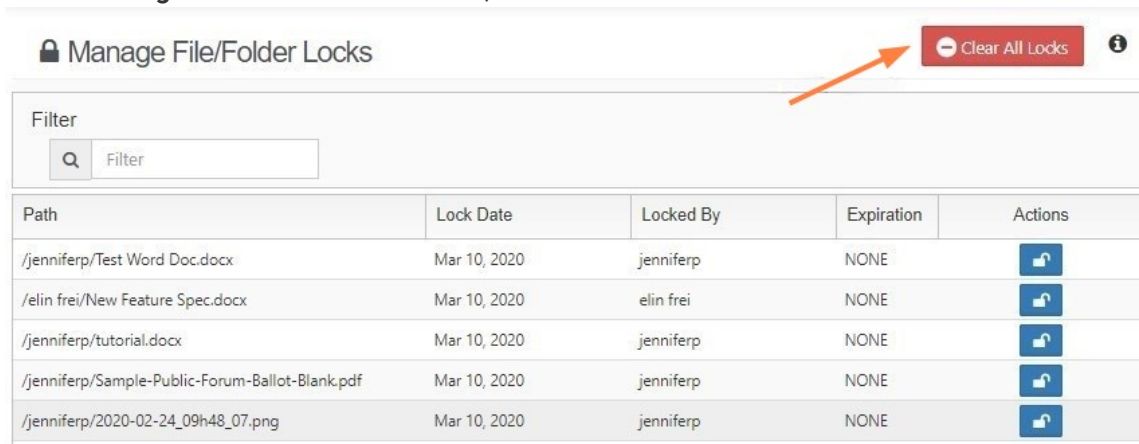
1. Log on to admin portal.
2. From the left navigation pane, click **User Locks**.
3. On the **Manage File/Folder Locks** screen, find the file or folder whose lock you want to remove.
4. In the row containing that file or folder name, under the **Actions** column, click the unlock button (  ).

5. On the **Confirm Override** screen, click **OK**.



**To release the lock on all locked files and folders:**

1. Log on to admin portal.
2. From the left navigation pane, click **User Locks**.
3. On the **Manage File/Folder Locks** screen, click **Clear All Locks**.



A confirmation dialog box opens.

4. Click **OK**.

# Managing User-Defined Notifications

Users can configure notifications on their file and folder paths or admins can configure notifications on the paths for them. As an admin, you can add and edit these notifications.

Unless you check the **Disable User Override** setting in the policy assigned to a user, they can override your changes to their notification settings in the user interface.

See the page Notifications for file changes for information on disabling user overrides.

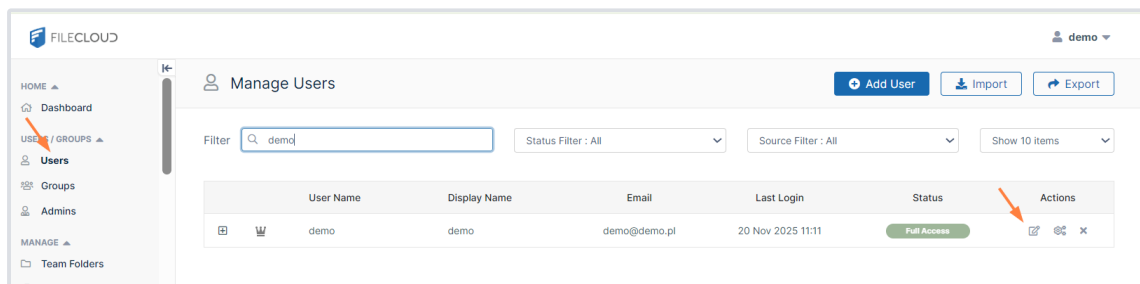
**In this section:**

## Editing individual user's file and folder notifications

As an admin, you can edit notifications on a specific user's file and folder paths by clicking the **Manage Notifications** icon in the user's details.

### To edit a user's file and folder notifications:

1. To open the **Manage Users** screen, In the navigation panel, click **Users**.
2. Click the edit icon across from the user.



The User Details dialog box opens.

3. Click the **Manage Notifications** icon.

**User Details**

Name	demo	Total Quota	10 GB
Email	demo@demo.pl	Used Quota	372 MB
Last Login	20 Nov 2025 11:11	Available Quota	9.6 GB
TOS Date	13 Mar 2025 08:25	Used Storage	372 MB
Group	<a href="#">Manage</a>		<a href="#">More</a>

Manage Files   Manage Policy   Manage Shares   Mobile Devices   Reset Password   Reset TOTP   Send Email   **Manage Notifications**   Manage Backups

Delete Account

Profile Image

[Update](#)   [Remove](#)





Access Level: Full Access

Authentication: Default

[Save](#)   [Close](#)

The **Manage Notifications for <user>** dialog box opens. All of the paths to files or folders with notifications defined on them are listed.

4. Click the edit icon in the row for path.

Manage files for demo			
Path	Modified Date	User	Actions
/demo/a	30/10/2025 5:40 AM	demo	 
/demo/b	04/11/2025 9:14 AM	demo	 

The **Notification Settings for <file/folder>** dialog box opens.

Notification Settings for a

Path: /demo/a

Use default notification settings  
 Use my own notification settings

Send Notifications

Send notifications on

<input checked="" type="checkbox"/> Upload When a file or folder is added	<input type="checkbox"/> Download When a file or folder is downloaded
<input type="checkbox"/> Share When a file or folder is shared with someone	<input type="checkbox"/> Delete When a file or folder is deleted
<input type="checkbox"/> Rename When a file or folder is renamed	<input type="checkbox"/> Update When a file is modified
<input type="checkbox"/> Preview When a file is viewed in the browser or in the mobile app	<input type="checkbox"/> Lock/Unlock When a file or folder is locked or unlocked
<input type="checkbox"/> Self Notifications Send notifications for actions done by me	

5. Edit the notification settings:

- If you want to reset the user's settings to the defaults, check **Use default notification settings**. **Use my own notification settings** and all of the settings below it become unselected. If the user is permitted to override your settings, they may turn back on **Use my own notification settings** but will have to reset the individual settings.
- If you want to turn off notifications temporarily, uncheck **Send Notifications**; otherwise, leave it checked.

- If you want to edit which types of actions users are notified about, check and uncheck the boxes under **Send notifications on**.
- If you want the user to receive notifications when they have performed an action on the file or folder, check the **Self Notifications** box.
- If the user has **Use default notification settings** checked you can select **Use my own notification settings** and check **Send Notifications** and then check the boxes of the actions you want users notified about.

## Editing all users file and folder path notifications

You can edit the notifications that users have defined for file and folder paths on the **Manage Notifications** screen. The screen shows all notifications assigned to paths for all users in your system.

### To edit user-defined notifications on file and folder paths:

1. To open the **Manage Notifications** screen, in the navigation panel, click **Notifications**.
2. Click the edit icon in the row for the file or folder.

The screenshot shows the 'Manage Notifications' interface. On the left, a navigation menu includes 'HOME', 'USERS / GROUPS', and 'MANAGE'. The 'Notifications' option is highlighted. The main content area features a search filter and an 'Add Rule' button. Below is a table listing notifications:

Path	Modified Date	User	Actions
/client_test/backups/client_test_client_logss	13/10/2025 10:12 AM	client_test	
/cathydev2/backups/cathydev2_client_logs	13/10/2025 3:07 PM	cathydev2	
/demo/a	30/10/2025 5:40 AM	demo	
/artur	30/10/2025 5:51 AM	artur	
/demo/b	04/11/2025 9:14 AM	demo	

The Notification Settings for <file/folder> dialog box opens:

Notification Settings for client\_test\_client\_logss
✕

Path: /client\_test/backups/client\_test\_client\_logss

Use default notification settings  
 Use my own notification settings

Send Notifications

Send notifications on

<input checked="" type="checkbox"/> <b>Upload</b> When a file or folder is added	<input checked="" type="checkbox"/> <b>Download</b> When a file or folder is downloaded
<input type="checkbox"/> <b>Share</b> When a file or folder is shared with someone	<input type="checkbox"/> <b>Delete</b> When a file or folder is deleted
<input type="checkbox"/> <b>Rename</b> When a file or folder is renamed	<input type="checkbox"/> <b>Update</b> When a file is modified
<input type="checkbox"/> <b>Preview</b> When a file is viewed in the browser or in the mobile app	<input type="checkbox"/> <b>Lock/Unlock</b> When a file or folder is locked or unlocked
<input type="checkbox"/> <b>Self Notifications</b> Send notifications for actions done by me	

Save

Cancel

### 3. Edit the notification settings:

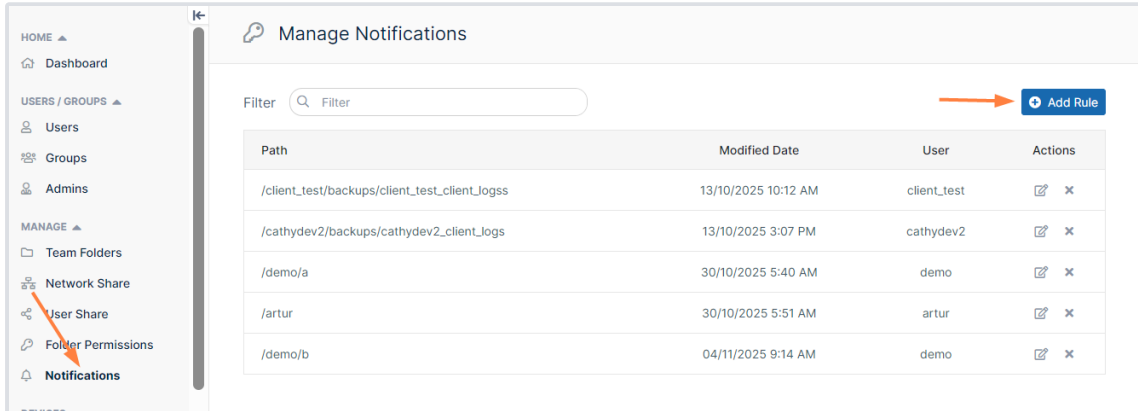
- If you want to reset the user's settings to the defaults, check **Use default notification settings**. **Use my own notification settings** and all of the settings below it become unselected. If the user is permitted to override your settings, they may turn back on **Use my own notification settings** but will have to reset the individual settings.
- If you want to turn off notifications temporarily, uncheck **Send Notifications**; otherwise, leave it checked.
- If you want to edit which types of actions users are notified about, check and uncheck the boxes under **Send notifications on**.
- If you want the user to receive notifications when they have performed an action on the file or folder, check the **Self Notifications box**.
- If the user has **Use default notification settings** checked you can select **Use my own notification settings** and check **Send Notifications** and then check the boxes of the actions you want users notified about.

## Adding notifications for actions on user's files and folders

You can add notifications for actions performed on users' file and folder paths.

### To add notifications to users files or folder

1. To open the **Manage Notifications** screen, in the navigation panel, click **Notifications**.
2. In the upper-right corner of the screen, click **Add Rule**.



The screenshot shows the 'Manage Notifications' interface. On the left, a navigation menu includes 'HOME', 'Dashboard', 'USERS / GROUPS' (Users, Groups, Admins), and 'MANAGE' (Team Folders, Network Share, User Share, Folder Permissions, Notifications). The 'Notifications' item is highlighted. The main content area has a search filter and an 'Add Rule' button. Below is a table of existing notification rules:

Path	Modified Date	User	Actions
/client_test/backups/client_test_client_logss	13/10/2025 10:12 AM	client_test	
/cathydev2/backups/cathydev2_client_logs	13/10/2025 3:07 PM	cathydev2	
/demo/a	30/10/2025 5:40 AM	demo	
/artur	30/10/2025 5:51 AM	artur	
/demo/b	04/11/2025 9:14 AM	demo	

The **Add Custom User Notifications Rule** dialog box opens:

Notification Settings for
✕

**Account or Email**

**Path\***

Use default notification settings  
 Use my own notification settings

Send Notifications

Send notifications on

<input checked="" type="checkbox"/> <b>Upload</b> <small>When a file or folder is added</small>	<input type="checkbox"/> <b>Download</b> <small>When a file or folder is downloaded</small>
<input type="checkbox"/> <b>Share</b> <small>When a file or folder is shared with someone</small>	<input type="checkbox"/> <b>Delete</b> <small>When a file or folder is deleted</small>
<input type="checkbox"/> <b>Rename</b> <small>When a file or folder is renamed</small>	<input checked="" type="checkbox"/> <b>Update</b> <small>When a file is modified</small>
<input type="checkbox"/> <b>Preview</b> <small>When a file is viewed in the browser or in the mobile app</small>	<input type="checkbox"/> <b>Lock/Unlock</b> <small>When a file or folder is locked or unlocked</small>
<input type="checkbox"/> <b>Self Notifications</b> <small>Send notifications for actions done by me</small>	

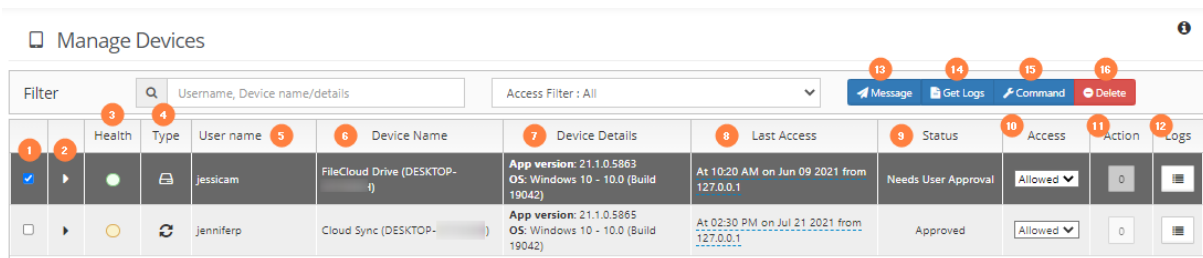
3. In **Account or Email**, enter the username or email address of the user.
4. In **Path**, enter the path to the file or folder in the user's storage.
5. Select **Use my notification settings**.
6. Check **Send Notifications**.
7. Below **Send Notifications on** check the actions for which you want to send share users notifications.
8. If you want the user who owns the file or folder to receive notifications about their own actions on it, check **Self Notifications**.
9. Click **Save**.

# Managing Client Devices

**Remote Device Management**  
 You must be logged on as an Administrator or be a member of the Administrators group in order to perform Device Management actions.

As an administrator, you can manage the various clients connecting to the FileCloud instance.

- This feature is called Remote Client Management (RCM) or Data Leak Prevention Control (DLPC)



## What Do All These Columns Mean?

Column	Title	Description
1	<input type="checkbox"/>	Checkbox to identify the client device record you are working with
2		Arrow to expand or collapse device details
3	<b>Health</b>	Health icon displayed as a color Green = Healthy Yellow = Needs Attention
4	<b>Type</b>	Client device icon
5	<b>User Name</b>	The account name that user logged in with on the client device
6	<b>Device Name</b>	The device name as setup by the client device. <ul style="list-style-type: none"> <li>• This can be generic like "Cloud Sync" or "Client Drive" or specific like "Anis' iPhone 5"</li> </ul>
7	<b>Device Details</b>	Displays the OS type, OS version and the Client App's version.

8	<b>Last Access</b>	Displays the last time this device connected to the FileCloud server <ul style="list-style-type: none"> <li>Also displays the location where the client connected from</li> </ul>
9	<b>Status</b>	Indicates whether the device has been Approved or Not Approved for Access by the administrator
10	<b>Access</b>	Indicates if the device can connect or not. <ul style="list-style-type: none"> <li>Allow</li> <li>Block</li> <li>Remote wipe</li> </ul>
11	<b>Action</b>	The list of queued actions for that client device, such as the number of messages.
12	<b>Logs</b>	Folder to view uploaded logs from the client
13	<b>Message</b>	Opens a window to send a message to the selected client
14	<b>Get Logs</b>	Retrieves the logs from the selected client
15	<b>Command</b>	Sends a configuration command to the selected client
16	<b>Delete</b>	Removes the selected client from the list of connect clients <ul style="list-style-type: none"> <li>Logs the user out of their account</li> <li>Closes the connection</li> <li>Removes data associated with the device</li> <li>Removes any connection permissions associated with the device</li> </ul>

## FAQ's

### What Devices Can Connect?



By Default, FileCloud will not allow non RCM Compliant clients to connect into FileCloud service. You can change this behavior in [Server Settings](#) page.

The following devices can connect to FileCloud Server and can be managed from the Admin Portal:

- **FileCloud iOS App**
- **FileCloud Android App**
- **FileCloud Windows Store App**
- **FileCloud Sync**
- **FileCloud Drive**
- **FileCloud Desktop for Windows**
- **FileCloud Desktop for macOS**
- **FC Outlook AddIn**
- **FC Office AddIn**
- **FC Desktop Edit**
- **FC File Browser**

Admin user will be able to see all devices that connected to a FileCloud server using the Admin Control Panel.

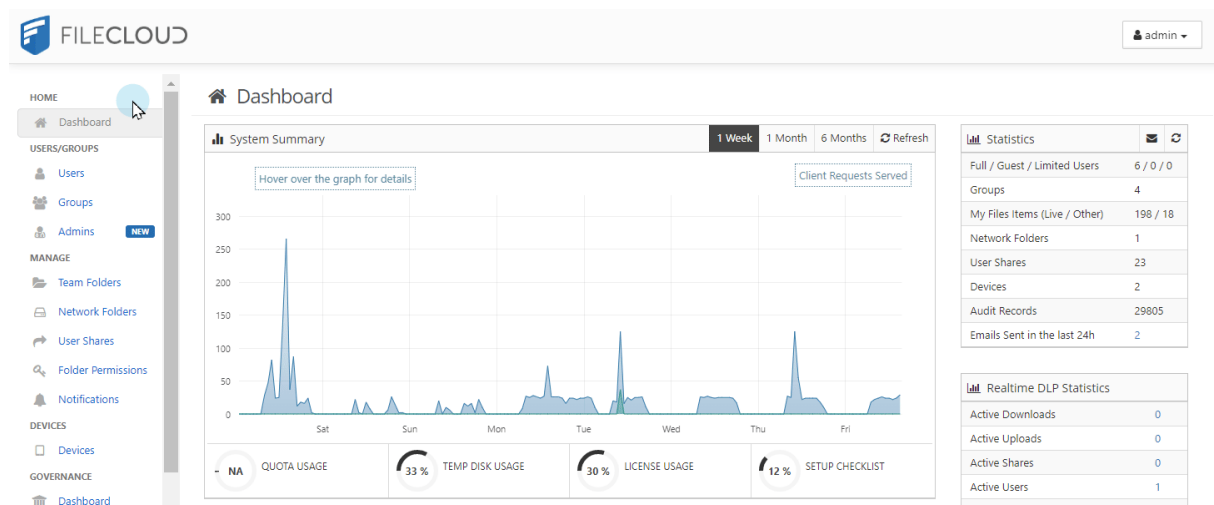
The number of devices are shown in the Summary and the actual list of devices can be seen from the "Manage Devices" menu.

### Where Can I See a List of Connected Devices?

An administrator can open the list of devices to manage using one of the following ways:

- Look on the Home dashboard of the Admin Portal
- Look on the **Devices dashboard in the Admin Portal**
- On a [User Properties Popup](#), click **Manage Mobile Devices**

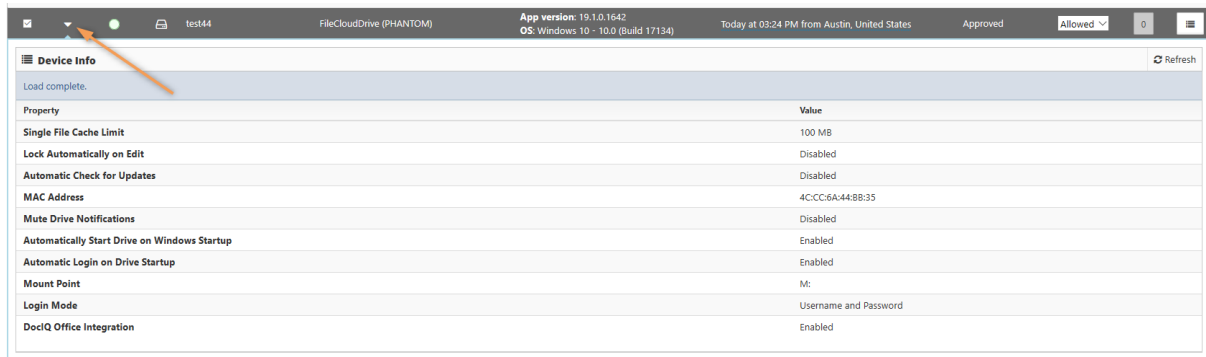
💡 Sometimes a list may start out empty. However, as users connect devices to the FileCloud Server by logging in, the devices will appear.



## How Do You Want to Manage a Device?


The following operations are available from the Device Management panel:

### View Details of a Client Device



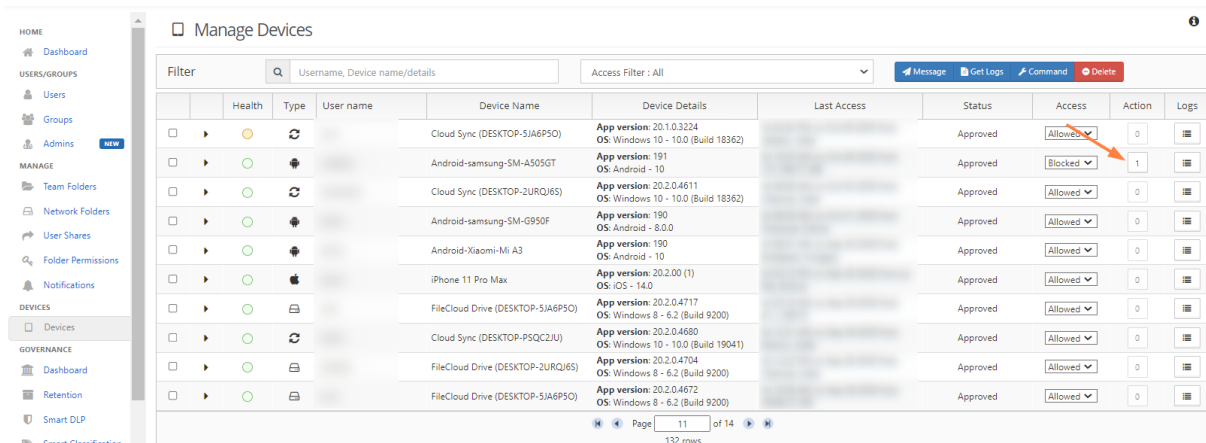
Property	Value
Single File Cache Limit	100 MB
Lock Automatically on Edit	Disabled
Automatic Check for Updates	Disabled
MAC Address	4CCC-6A-44-8B:35
Mute Drive Notifications	Disabled
Automatically Start Drive on Windows Startup	Enabled
Automatic Login on Drive Startup	Enabled
Mount Point	M:
Login Mode	Username and Password
DocIQ Office Integration	Enabled

To see the details of a connected device:

1. Log into *Admin Portal*.
2. From the left navigation panel, under *DEVICES*, select *Devices*.
3. On the *Manage Devices* screen, select the device you want details for.
4. In the second column, click the expand arrow (  ).

### View and Manage Actions Queued

If a message is queued to a device, it is possible to view them using the Admin Portal.



	Health	Type	User name	Device Name	Device Details	Last Access	Status	Access	Action	Logs
<input type="checkbox"/>				Cloud Sync (DESKTOP-5JA6P5O)	App version: 20.1.0.3224 OS: Windows 10 - 10.0 (Build 18362)		Approved	Allowed	0	
<input type="checkbox"/>				Android-samsung-SM-A505GT	App version: 191 OS: Android - 10		Approved	Blocked	1	
<input type="checkbox"/>				Cloud Sync (DESKTOP-2URQJ6S)	App version: 20.2.0.4611 OS: Windows 10 - 10.0 (Build 18362)		Approved	Allowed	0	
<input type="checkbox"/>				Android-samsung-SM-G950F	App version: 190 OS: Android - 8.0.0		Approved	Allowed	0	
<input type="checkbox"/>				Android-Xiaomi-Mi A3	App version: 190 OS: Android - 10		Approved	Allowed	0	
<input type="checkbox"/>				iPhone 11 Pro Max	App version: 20.2.00 (1) OS: iOS - 14.0		Approved	Allowed	0	
<input type="checkbox"/>				FileCloud Drive (DESKTOP-5JA6P5O)	App version: 20.2.0.4717 OS: Windows 8 - 6.2 (Build 9200)		Approved	Allowed	0	
<input type="checkbox"/>				Cloud Sync (DESKTOP-PSQCZJU)	App version: 20.2.0.4680 OS: Windows 10 - 10.0 (Build 19041)		Approved	Allowed	0	
<input type="checkbox"/>				FileCloud Drive (DESKTOP-2URQJ6S)	App version: 20.2.0.4704 OS: Windows 8 - 6.2 (Build 9200)		Approved	Allowed	0	
<input type="checkbox"/>				FileCloud Drive (DESKTOP-5JA6P5O)	App version: 20.2.0.4672 OS: Windows 8 - 6.2 (Build 9200)		Approved	Allowed	0	

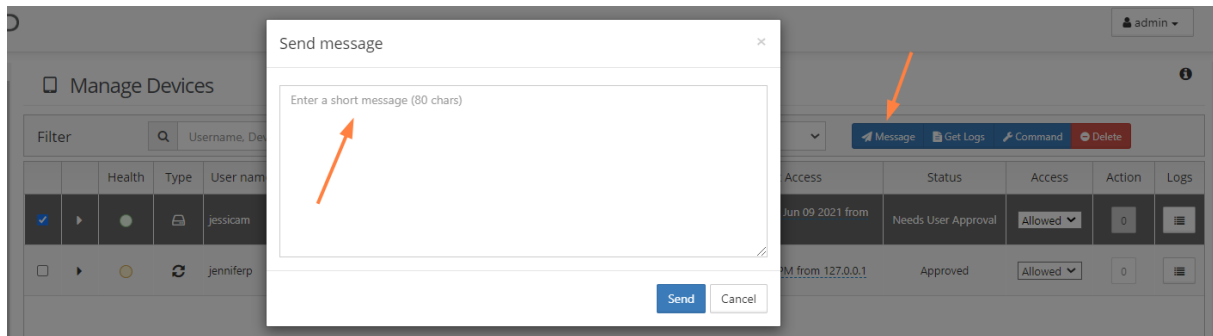
To view Actions:

1. Log into *Admin Portal*.
2. From the left navigation panel, under *DEVICES*, select *Devices*.
3. On the *Manage Devices* screen, select the device you want details for.
4. In the *Actions* column, click the button.
5. Any queued action can be deleted from the pending actions list by clicking the Trash icon.

## Add a Message to the Client's Display

An Admin can display a short message on the remote client using the "Add message" feature.

- The entered message(s) will be displayed when the remote client is connected to the FileCloud instance.
- If more than one message is queued to a device, they will be displayed in the order they were created.
- The messages will be shown only once per client
- The messages will be shown when the client connects to the FileCloud server (as a part of login operation)
- If the client is already connected, then it will retrieve the message periodically and display it to the user



To send a message:

1. Log into *Admin Portal*.
2. From the left navigation panel, under *DEVICES*, select *Devices*.
3. On the *Manage Devices* screen, select the device to send a message to.
4. Click **Add Message**, type in the message, and then click **Send**.

## Blocking and Remote Wiping

FileCloud's RMC function allows the Administrator to selectively block a specific client device from logging into the FileCloud server.

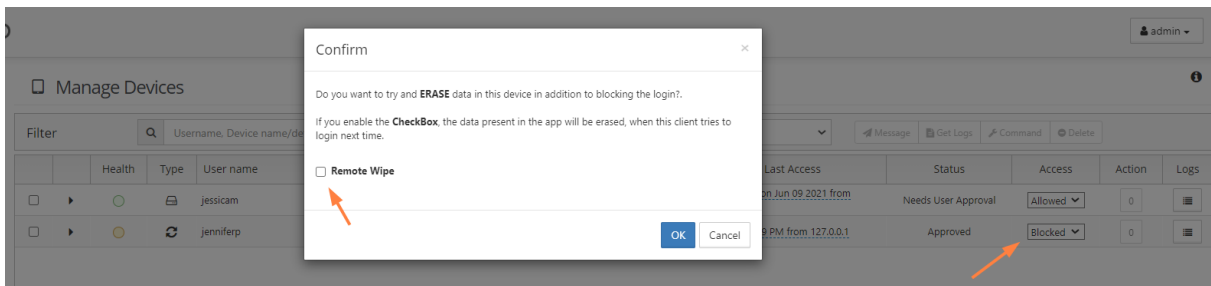
When a client device is blocked (or blocked with remote wipe action), it will be executed one of the following two ways

- If the client is not connected, the block (and remote wipe) will happen when it tries to log into the server
- If the client is connected, the block and remote wipe will occur and the client will automatically exit out

💡 In addition to Blocking a Client Device from logging in, Administrator can also wipe FileCloud folders in the remote device.

The remote wipe will have the following effect on each of the clients

1.
  - FileCloudDrive: Cache folder data will be deleted and application will logout
  - FileCloudSync: Synced data will be deleted and application will logout
  - iOS and Android: Downloaded data in "This Device" will be deleted and will log out of the server



#### To block (but not wipe remote data):

1. Open a browser and log into *Admin Portal*.
2. From the left navigation panel, under *DEVICES*, select *Devices*.
3. On the *Manage Devices* screen, select the device you want to block.
4. In the *Permissions* column, select *Blocked*.
5. On the *Confirm* dialog, to just block but not remote wipe the client device, clear the *Remote Wipe* checkbox.
6. Click *OK*.

#### To block and wipe remote data in a client device:

1. Open a browser and log into *Admin Portal*.
2. From the left navigation panel, under *DEVICES*, select *Devices*.
3. On the *Manage Devices* screen, select the device you want to block and wipe.
4. In the *Permissions* column, select *Blocked*.
5. On the *Confirm* dialog, select the *Remote Wipe* checkbox.
6. Click *OK*.

### Delete a Client Device Record

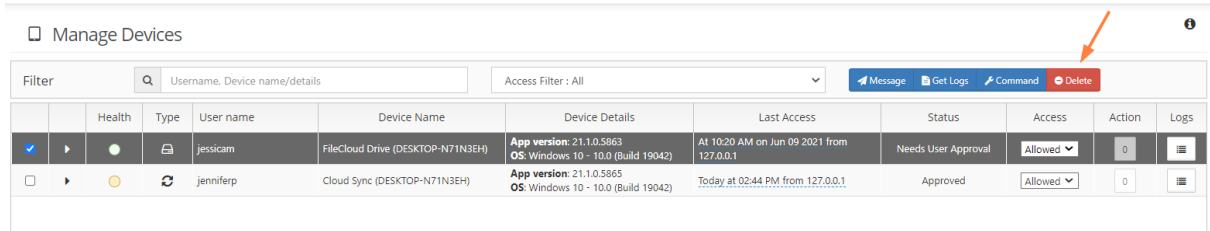
It is possible to delete a client record from the FileCloud system.

You might want to use this feature when:

- The userid is no longer valid

- The associated client record no longer needs to be managed

💡 If you want to keep the device record but do not want to allow it to connect for a period of time, you can use the Block action.



Manage Devices

Filter: Username, Device name/details    Access Filter: All    Message    Get Logs    Command    **Delete**

	Health	Type	User name	Device Name	Device Details	Last Access	Status	Access	Action	Logs
<input checked="" type="checkbox"/>	<span style="color: green;">●</span>		jessicam	FileCloud Drive (DESKTOP-N71N3EH)	App version: 21.1.0.5863 OS: Windows 10 - 10.0 (Build 19042)	At 10:20 AM on Jun 09 2021 from 127.0.0.1	Needs User Approval	Allowed	0	
<input type="checkbox"/>	<span style="color: orange;">●</span>		jenniferp	Cloud Sync (DESKTOP-N71N3EH)	App version: 21.1.0.5865 OS: Windows 10 - 10.0 (Build 19042)	Today at 02:44 PM from 127.0.0.1	Approved	Allowed	0	

### To delete a client device record:

1. Open a browser and log into *Admin Portal*.
2. From the left navigation panel, under *DEVICES*, select *Devices*.
3. On the *Manage Devices* screen, select the device you want to delete.
4. At the top of the screen, click the Delete button.

## Centralized Device Management

Administrators can manage devices from the Admin Portal after remote management is enabled in FileCloud Sync.

You can use Device Management features to configure device settings like client configurations and apply them all-at-once to users or groups.

## Configure Centralized Device Management

Client Device configuration settings can be configured remotely by specifying the configuration XML using 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. For the Sync client, when an Admin sets a remote client policy, a user working in the Sync app cannot modify the settings. Sync will display a message saying "Centralized Configuration is being applied. Settings cannot be changed."

### To set a device configuration for a policy:

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.

## Policies

New Policy

Create a new policy

New Policy

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

<< < Page  of 1 > >>  
 2 rows

- Edit the policy of the users whose client device settings you want to modify.
- Click the **Device Configuration** tab.
- Paste or type in the remote device configuration XML in **Device Configuration**.

Effective Policy: "Global Default Policy" ✕

General   2FA   User Policy   Client Application Policy   Device Configuration   Notifications

Some policy settings will not be applicable for Guest and External users.

Device Configuration

Client Configuration

```
<xml>
  <winclouddrive>
    <!-- XML for Windows Drive -->
  </winclouddrive>
</xml>
```

Customize default configuration for any of your client applications in valid XML.

Cancel
Reset
Save

- Click **Save**.

Device configuration is specified via XML, the general format of the XML is as follows

```
<xml>

  <winclouddrive>
    <!-- XML for Windows Drive -->
  </winclouddrive>

  <macclouddrive>
    <!-- XML for Mac Drive -->
  </macclouddrive>

  <cloudsync>
    <!-- XML for Sync App -->
  </cloudsync>

  <fssync>
    <!-- XML for ServerSync App -->
  </fssync>

  <fileclouddesktopmac>
    <setting>
      <key>runatstartup</key>
      <value>1</value><
      <default>1</default>
    </setting>
  </fileclouddesktopmac>


  <fileclouddesktopwindows>
    <setting>
      <key>runatstartup</key>
      <value>1</value>
      <default>1</default>
    </setting>
  </fileclouddesktopwindows>

</xml>
```


## What do you want to configure?

### Device Configuration XML For Drive for Mac

Client Device configuration settings can be configured remotely by specifying the configuration XML using 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.

### To set FileCloud Drive for mac device configuration in a policy:













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.

## Policies

New Policy

Create a new policy

New Policy

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

Page 1 of 1  
2 rows

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 following remote device configuration XML in **Device Configuration** replacing **<!-- XML for Mac Drive -->** with any parameters from the table below.

```
<xml>
  <macclouddrive>
    <!-- XML for Mac Drive -->
  </macclouddrive>
</xml>
```

Effective Policy: "Global Default Policy" ✕

General   2FA   User Policy   Client Application Policy   **Device Configuration**   Notifications


Some policy settings will not be applicable for Guest and External users.

Device Configuration  
Client Configuration

```
<xml>
  <macclouddrive>
    <!-- XML for Mac Drive -->
  </macclouddrive>
</xml>
```

Customize default configuration for any of your client applications in valid XML.

Supported parameters for FileCloud Drive for Mac. All parameters are optional. Add one or more of these parameters (as XML tags) in the <macclouddrive> tags in the XML.

Parameter (XML Tag)	Value	Example
maxdownloadsizeinmb	Assigns the maximum single file download limit to the supplied value. <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;">  The download limit does not apply to the following file types: .txt, .rtf, .doc, .docx, .xls, .xlsx, .ppt, .pptx, and .indd.           </div>	<maxdownloadsizeinmb>100</maxdownloadsizeinmb>
driveloginmode	Setting this to "0" will cause filecloud drive to use username/password to log into the Filecloud server. Setting this value to "1" will cause drive to use device code authentication mode	<driveloginmode>1</driveloginmode>
drivelockonupdate	Setting this value to 1 will enable automatic lock on edit function in FileCloud Drive. Setting this to 0 will disable the drive's lock on edit function	<drivelockonupdate>1</drivelockonupdate>

Parameter (XML Tag)	Value	Example
drivemutemessages	Setting this value to 1 will disable system tray notifications being shown to the user.	<drivemutemessages>1</drivemutemessages>
driveopenexplorernstartup	Setting this value to 1 will automatically open finder when drive starts up and 0 will disable it.	<driveopenexplorernstartup>1</driveopenexplorernstartup>
checkupdates	Setting this value to 1 will enable automatic checking for new versions of FileCloud Drive for Mac and setting this value to 0 will disable it.	<checkupdates>1</checkupdates>
disableprecaching	Setting this value to 1 disables precaching.  If many Drive users have access to a large data structure, the FileCloud server may experience a high load. This can be avoided by deactivating precaching. However, folder contents will no longer be cached in Drive which can lead to longer response times.	<disableprecaching>1</disableprecaching>
disableautologin	By default, once a drive is mounted, the authentication will be reused on every FileCloud Drive for Mac start ups. Setting this key to 1 will require authentication from user on every start up.	<disableautologin>1</disableautologin>
currentlanguage	Currently available languages.	<currentlanguage>english</currentlanguage>


## Device Configuration XML For Outlook Add-in

Outlook Add-in configuration settings can be configured remotely by specifying the configuration XML using 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.

### To set FileCloud's Outlook add-in device configuration for a policy:

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.

## Policies

New Policy

Create a new policy

New Policy

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

<< < Page  of 1 > >>  
 2 rows

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 following remote device configuration XML in **Device Configuration** replacing **<!-- XML for outlookaddin App -->** with any parameters from the table below.

```
<xml>
  <outlookaddin>
    <settings>
      <!-- XML for outlookaddin App -->
    </settings>
  </outlookaddin>
</xml>
```

Effective Policy: "Global Default Policy" ✕

General
2FA
User Policy
Client Application Policy
Device Configuration
Notifications

Some policy settings will not be applicable for Guest and External users.

Device Configuration  
Client Configuration

```
<xml>
  <outlookaddin>
    <settings>
      <!-- XML for outlookaddin App -->
    </settings>
  </outlookaddin>
</xml>
```

Customize default configuration for any of your client applications in valid XML.

Cancel
Reset
Save

Supported parameters for the FileCloud Outlook add-in. All parameters are optional. Add one of more of these parameters (as XML tags) in the <settings> tags in the above XML.

Parameter (XML Tag)	Value	Example
autoupload	Whether autoupload is on or off. 0 = off, 1 = on	<autoupload>1</autoupload>
autouploadsize	The minimum size in MB an attachment must be to be automatically uploaded	<autouploadsize>3</autouploadsize>
serverurl	FileCloud server URL	<serverurl> <a href="http://www.yourdomain.com">http://www.yourdomain.com</a> </serverurl>
sharetype	Share Type 0 = Public Share, 1 = Password Protected Share	<sharetype>0</sharetype>
sharetext	Share Text in HTML. Ensure to use CDATA to accomodate special characters in xml	<sharetext><![CDATA[Attachment: #filename# Download link: <a href='#url_link#'>#filename#</a> #password#]]></sharetext>

Parameter (XML Tag)	Value	Example
proxyserver	Proxy Server URL	<proxyserver> <a href="http://proxyserverurl.com">http://proxyserverurl.com</a> </proxyserver>
proxyusername	Proxy Server Username	<proxyusername>proxyserverusername</proxyusername>
proxypassword	Proxy Server Password	<proxypassword>proxyserverpassword</proxypassword>
proxyport	Proxy Server Port	<proxyport>9000</proxyport>
ssllevel	Require strict SSL verification of VERIFY_STRICT or VERIFY_NONE	<ssllevel>VERIFY_STRICT</ssllevel>
sslverify	Connect only TLS 1.2 server. Empty string or TLSV1_2_CLIENT_USE	<sslverify><sslverify>

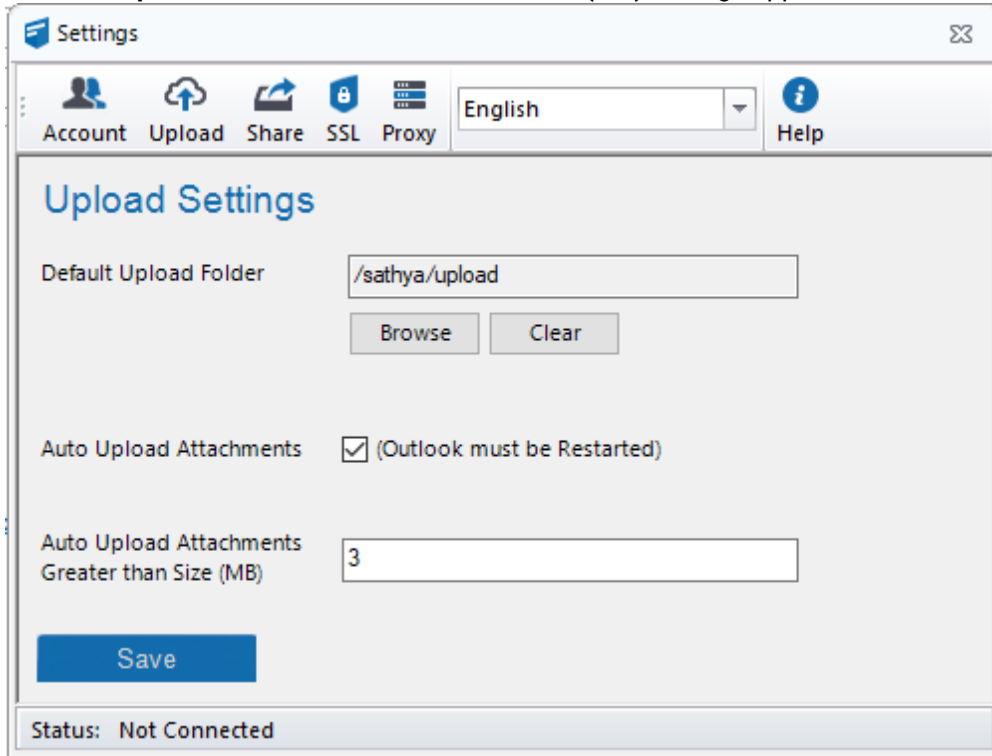
### To set default values for auto upload:

In the Outlook add-in device configuration, you can set the default values for **Auto Upload Attachments** and **Auto Upload Attachments Greater than Size (MB)**.

Follow the instructions above for setting the device configuration, and enter values: for <autoupload> and <autouploadsize>, for example:

```
<xml>
  <outlookaddin>
    <settings>
      <autoupload>1</autoupload>
      <autouploadsize>3</autouploadsize>
    </settings>
  </outlookaddin>
</xml>
```

When the Outlook Add-in is opened, and **Settings > Upload** is accessed, the **Auto Upload Attachments** and **Auto Upload Attachments Greater than Size (MB)** settings appear as:



The screenshot shows the 'Settings' dialog box for the Outlook Add-in. The title bar reads 'Settings' with a close button. Below the title bar is a navigation bar with icons for 'Account', 'Upload', 'Share', 'SSL', and 'Proxy', a language dropdown menu set to 'English', and a 'Help' button. The main content area is titled 'Upload Settings' and contains the following settings:

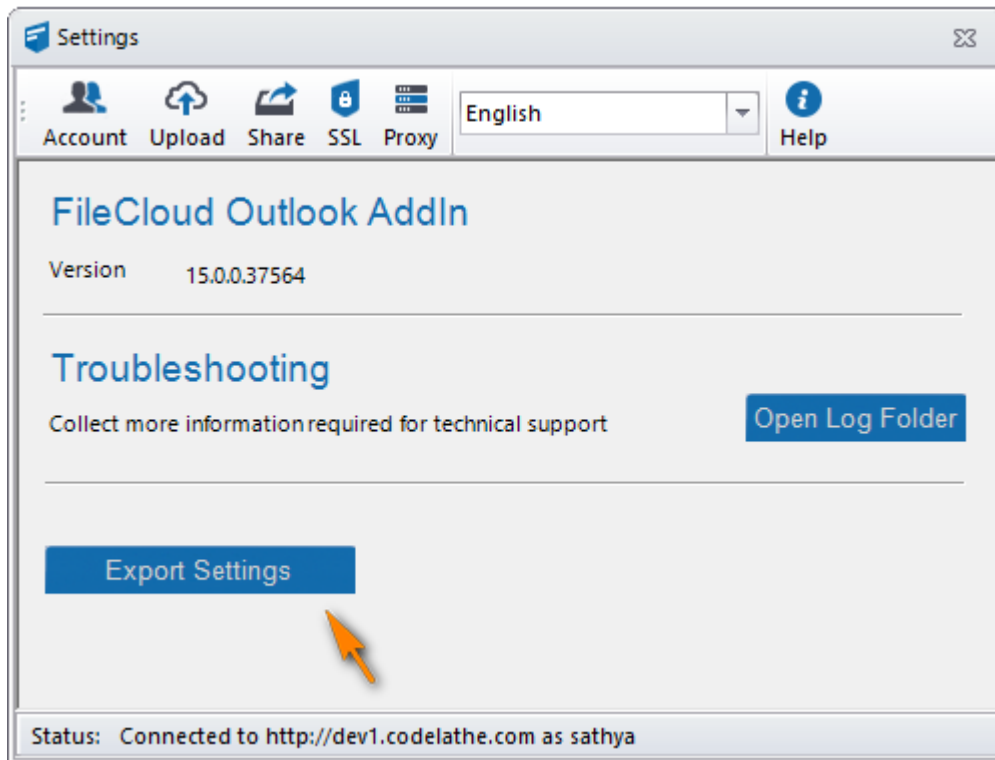
- Default Upload Folder:** A text input field containing '/sathya/upload'. Below it are 'Browse' and 'Clear' buttons.
- Auto Upload Attachments:** A checkbox that is checked, with the text '(Outlook must be Restarted)' next to it.
- Auto Upload Attachments Greater than Size (MB):** A text input field containing the number '3'.

At the bottom left of the settings area is a blue 'Save' button. At the bottom of the dialog box, a status bar indicates 'Status: Not Connected'.

### 💡 Tips and Tricks

The easiest way to get the configuration XML for sync apps is by configuring an Outlook Add-in as needed and then exporting the configuration.

**Show me how...**




## Device Configuration XML For Server Sync

Client Device configuration settings can be configured remotely using 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.

### To set a ServerSync device configuration in a policy:

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.

## Policies

New Policy

Create a new policy

New Policy

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

<< < Page  of 1 > >>  
 2 rows

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 following remote device configuration XML in **Device Configuration** replacing **<!-- XML for ServerSync App -->** with any parameters from the table below.

```
<xml>
  <fssync>
    <!-- XML for ServerSync App -->
  </fssync>
</xml>
```

Effective Policy: "Global Default Policy" ✕

General
2FA
User Policy
Client Application Policy
Device Configuration
Notifications

Some policy settings will not be applicable for Guest and External users.

Device Configuration  
Client Configuration

```
<xml>
  <fssync>
    <!-- XML for ServerSync App -->
  </fssync>
</xml>
```

Customize default configuration for any of your client applications in valid XML.

Cancel
Reset
Save

Supported parameters for FileCloud ServerSync. All parameters are optional. Add one or more of these parameters (as XML tags) in the <fssync> tags in the XML.

XML Tag	Value	Example
limit_folder_count	Number of folders to sync. If key is not specified, then there are no folders to sync.	<limit_folder_count>0</limit_folder_count>
limit_folder_1 limit_folder_2 limit_folder_3 ...	<p>Depending upon the number of folders specified in the limit_folder_count, you will need to have the appropriate number of entries.</p> <p>The folder value is specified using 5 parameters using the following format  <b>&lt;REMOTE FOLDER&gt; &lt;LOCAL FOLDER&gt; &lt;PERMISSIONS&gt; &lt;SYNC TYPE&gt; &lt;SYNC DISABLED&gt;</b></p> <p><b>&lt;REMOTE FOLDER&gt;</b> = E.g.: /john/folder1  <b>&lt;LOCAL FOLDER&gt;</b> = E.g: C:\data\localfolder  <b>&lt;PERMISSION&gt;</b> = 1 - Allow NTFS permissions to be applied to local folder as per permissions of the folder on the remote Server, 0 - Deny NTFS permissions to be applied  <b>&lt;SYNC TYPE&gt;</b> = 0 (2-way sync) or 1 (remote to local sync).  <b>&lt;SYNC DISABLED&gt;</b> = 0 (enabled) or 1 (disabled).</p>	<limit_folder_1>/john/folder1 C:\data\local 0 1 0</limit_folder_1>

XML Tag	Value	Example
disablenotifications	0/1 - Enable or Disable sync notifications	<disablenotifications>1</disablenotifications>
syncfrequency	number - Number in seconds to sync to the server (default is 120 seconds)	<syncfrequency>100</syncfrequency>
checkmodtime	0/1 - Advanced: check modification time in addition to size when checking for changes. Default is disabled.	<checkmodtime>1</checkmodtime>
checkcrc	0/1 - Advanced: check CRC in addition to size when checking for changes. Default is disabled.	<checkcrc>1</checkcrc>
deleteapprovalpct	Number from 0 to 100, which indicates what % of files being deleted requires approval. Default is 10. This applies only to file deletions in the local sync folder.	<deleteapprovalpct>20</deleteapprovalpct>
skipdeleteapproval	0/1 - Whether approvals are needed for bulk sync deletions. Default is disabled. When set to 1, approval is required if > 50 files are deleted AND percent of files being deleted is > <b>deleteapprovalpct</b> . This applies only to file deletions in the local sync folder.	<skipdeleteapproval>1</skipdeleteapproval>
currentlanguage	Allows changing the current language of the Server sync app	<currentlanguage>dutch</currentlanguage>

## Device Configuration XML For Sync

Client Device configuration settings can be configured remotely by specifying the configuration XML using policies.



For the Sync client, when an Admin sets a remote client policy, a user working in the Sync app cannot modify the settings. Sync will display a message saying "Centralized Configuration is being applied. Settings cannot be changed."

Any Sync settings in the config xml block the user's ability to configure selective sync, network folder, and backup folder settings. If you want users to be able to continue to change these settings, set the `allowuserconfigforlimitsync`, `allowuserconfigfornewfolders`, and `allowuserconfigforbackup` tags to 1 in the policy.


- `allowuserconfigforlimitsync` - enables users to select selective sync folders
- `allowuserconfigfornewfolders` - enables users to select network folders
- `allowuserconfigforbackup` - enables users to select backup folders

See [What XML settings allow users to modify folders?](#) below.

## FAQs

### How do I enter device configuration XML for Sync?

#### To set a FileCloud Sync device configuration in a policy:













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.

## Policies

### New Policy

Create a new policy

New Policy

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

<< < Page  of 1 > >>  
 2 rows

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 following remote device configuration XML in **Device Configuration** replacing **<!-- XML for Sync App -->** with any parameters from the table below.

```
<xml>
  <cloudsync>
    <!-- XML for Sync App -->
  </cloudsync>
</xml>
```

Effective Policy: "Global Default Policy"

General 2FA User Policy Client Application Policy **Device Configuration** Notifications

Some policy settings will not be applicable for Guest and External users.

Device Configuration  
Client Configuration

```
<xml>
  <cloudsync>
    <!-- XML for Sync App -->
  </cloudsync>
</xml>
```

Customize default configuration for any of your client applications in valid XML.

Cancel Reset Save

Supported parameters for FileCloud Sync. All parameters are optional. Add one or more of these parameters (as XML tags) in the <cloudsync> tags in the XML.

Parameter (XML Tag)	Value	Example
limitfolders	' ' separated list of folders for selective sync. If Limitfolders is not specified, then there are no folders for selective sync.	<limitfolders>/john/folder1 /john/folder2</limitfolders>
offline_folder_count	Number of offline folders to sync. If key is not specified, then there are no offline folders.	<offline_folder_count>0</offline_folder_count>

Parameter (XML Tag)	Value	Example
offline_folder_1 offline_folder_2 offline_folder_3 ...	<p>Depending upon the number of offline folders specified in the offline_folder_count, you will need to have the appropriate number of entries.</p> <p>The folder value is specified using 6 parameters using the following format</p> <p><b>&lt;LOCAL FOLDER&gt; &lt;REMOTE FOLDER&gt; &lt;SYNCTYPE&gt; &lt;SCHEDULE&gt; &lt;RECURSE INTO DIRECTORIES&gt; &lt;ALLOW REMOTE DELETION&gt; &lt;SENDEMAIL&gt;</b></p> <p><b>&lt;LOCAL FOLDER&gt;</b> = E.g: C:\data\localfolder  <b>&lt;REMOTE FOLDER&gt;</b> = E.g.: /john/folder1  <b>&lt;SYNC TYPE&gt;</b> = 0 - 2 Way Sync, 1 - Backup from Local to Remote, 2 - Read only copy of remote files to local  <b>&lt;SCHEDULE&gt;</b>= 1h (every 1 hour), 2h (every 2 hours), 4h (every 4 hours), 8h (every 8 hours), 24h (every 24 hours), 30m (every 30 minutes), manual (Manual), realtime (Real-time syncing)  <b>&lt;RECURSE INTO DIRECTORIES&gt;</b> = 1 - Recurse (top level and sub folders are synced), 0 - Not Recurse (only top level folder is synced)  <b>&lt;ALLOW REMOTE DELETION&gt;</b> = 1- Allowed (Local deletes are not propagated to server) , 0-Disallowed (Local deletes are not propagated to server)  <b>&lt;SENDEMAIL&gt;</b> = 1 - Send Email after backups, 0-No Email</p>	<offline_folder_1>C:\data\local\john\folder1 0 30m 1 0 0</offline_folder_1>
disablenotifications	0/1 - Enable or Disable sync notifications.	<disablenotifications>1</disablenotifications>
showlocks	0/1 - Enable or Disable if lock information is shown in icon overlay	<showlocks>1</showlocks>
syncfrequency	number - Number in seconds to sync to the server (default is 120 seconds)	<syncfrequency>100</syncfrequency>
checkmodtime	0/1 - Advanced: check modification time in addition to size when checking for changes. Default is disabled.	<checkmodtime>1</checkmodtime>
checkcrc	0/1 - Advanced: check CRC in addition to size when checking for changes. Default is disabled.	<checkcrc>1</checkcrc>
removeunshared	0/1 - Delete locally synced folders that are unshared. Default is disabled	<removeunshared>1</removeunshared>
deleteapprovalpct	Number from 0 to 100, which indicates what % of files requires deletion approval. Default is 10. This applies only to file deletions in the local sync folder.	<deleteapprovalpct>20</deleteapprovalpct>

Parameter (XML Tag)	Value	Example
skipdeleteapproval	0/1 - Whether approvals are needed for bulk sync changes. Default is disabled. When set to 1, approval is required if > 50 files are deleted AND percent of files being deleted is > <b>deleteapprovalpct</b> . This applies only to file deletions in the local sync folder.	<skipdeleteapproval>1</skipdeleteapproval>
currentlanguage	Allows changing the current language of the Sync app	<currentlanguage>dutch</currentlanguage>
globalbwforupload	Specifies the bandwidth limit when uploading files from the client to the server in terms of KB only. This limit can be different from the download limit.	<globalbwforupload>100</globalbwforupload>
globalbwfordownload	Specifies the bandwidth limit when downloading files from the server to the client in terms of KB only. This limit can be different from the upload limit.	<globalbwfordownload>50</globalbwfordownload>
altbwforupload	Specifies that alternative settings should be used instead of the global bandwidth limit when uploading files from the client to the server in terms of KB only. <b>⚠</b> If <i>altbwforupload</i> or <i>altbwfordownload</i> is specified but <i>altbwfromtime</i> and <i>altbwtotime</i> are missing, then the bandwidth values will not be set.	<altbwforupload></altbwforupload>
altbwfordownload	Specifies that alternative settings should be used instead of the global bandwidth limit when downloading files from the server to the client in terms of KB only. <b>⚠</b> If <i>altbwforupload</i> or <i>altbwfordownload</i> is specified but <i>altbwfromtime</i> and <i>altbwtotime</i> are missing, then the bandwidth values will not be set.	<altbwfordownload></altbwfordownload>
altbwfromtime	Specifies the starting time when the alternative settings should be used instead of the global bandwidth limit. Time must be expressed in the format HH:MM:SS <b>⚠</b> If <i>altbwforupload</i> or <i>altbwfordownload</i> is specified but <i>altbwfromtime</i> and <i>altbwtotime</i> are missing, then the bandwidth values will not be set.	<altbwfromtime>16:45:00</altbwfromtime>

Parameter (XML Tag)	Value	Example
altbwtime	<p>Specifies the ending time when the alternative settings should be used instead of the global bandwidth limit.</p> <p>Time must be expressed in the format HH:MM:SS</p> <p>⚠️ If <i>altbwforupload</i> or <i>altbwfordownload</i> is specified but <i>altbwfromtime</i> and <i>altbwtime</i> are missing, then the bandwidth values will not be set.</p>	<altbwtime>24:00:00</altbwtime>
altbwschedule_dayofweek	<p>Specifies the days of the week when the alternative settings should be used instead of the global bandwidth limit.</p> <p>This value can be any number such as: {-1, 0, 1, 2, 3, 4, 5, 6} where:</p> <ul style="list-style-type: none"> <li>-1 means every day</li> <li>0 means Sunday</li> <li>1 means Monday</li> <li>and so on...</li> </ul>	<altbwschedule_dayofweek>3</altbwschedule_dayofweek>
timeactivecontrolsset	<p>Enables/Disables the Active Sync Hours settings</p> <p>1 = enabled</p> <p>0 = disabled</p>	<timeactivecontrolsset>1</timeactivecontrolsset>
activesync_daysofweek	<p>Specifies the days of the week when a client can run the Sync app</p> <p>Any number {-1, 0, 1, 2, 3, 4, 5, 6} where:</p> <ul style="list-style-type: none"> <li>-1 = Everyday</li> <li>0 = Sunday</li> <li>1 = Monday</li> <li>and so on...</li> </ul>	<activesync_daysofweek>5</activesync_daysofweek>
activesync_timeofday	<p>Specifies the times during the days of the week when a client can run the Sync app</p> <p>Use the format HH:MM:SS-HH:MM:SS</p>	<activesync_timeofday>8:00:00-20:00:00</activesync_timeofday>
allowuserconfigforlimitsync	<p>0 = cannot modify the folder and any <i>limitfolder</i> setting is applied</p> <p>1 = can modify the folder and overrules any <i>limitfolder</i> setting</p> <p>This value works in combination with:</p> <ul style="list-style-type: none"> <li><i>limitfolders</i></li> </ul>	<allowuserconfigforlimitsync>1</allowuserconfigforlimitsync>

Parameter (XML Tag)	Value	Example
allowuserconfigfor nwfolders	Allows user to configure network folders  0 = cannot modify the folder and any <i>offlinefolder</i> setting is applied  1 = can modify the folder and overrules any <i>offlinefolder</i> setting  This value works in combination with: <ul style="list-style-type: none"> <li><i>offlinefolders</i></li> </ul>	<allowuserconfigfor nwfolders>1</ allowuserconfigfor nwfolders>
allowuserconfigfor backup	0 = cannot modify the folder and any <i>offlinefolder</i> setting is applied  1 = can modify the folder and overrules any <i>offlinefolder</i> setting  This value works in combination with: <ul style="list-style-type: none"> <li><i>offlinefolders</i></li> </ul>	<allowuserconfigfor backup>1</ allowuserconfigfor backup>
checkupdates (available in FileCloud 22.1)	0 = Sync does not check for updates on startup  1 = (default) Sync checks for updates on startup, and notifies user if there is an update	<checkupdates>1</ checkupdates>

### How do I get the configuration XML for Sync?

The easiest way to get the configuration XML for Sync is by installing a copy of Sync and configuring it as needed, and then exporting the configuration.

#### To export Sync configuration settings:

1. Install and Log In to FileCloud Sync.
2. From the system tray, right-click the FileCloud Sync icon, and choose **Open**.  
The mini-dashboard opens.
3. Click **Dashboard**.  
The main dashboard opens..
4. Click **Help**.  
The **Help** window opens.

5. Under **Configuration**, click **Export Configuration**.

### What variables are supported?

When specifying values, variables can be used as well. The following variables are currently supported.

Variable	Notes
\${USER}	Replaces with current logged in user name from the Operating System
\${HOME}	Replaces with the location of the current user's Home Path
\${USERID}	Replaces with the currently logged in FileCloud user account name

### What is the XML code for limiting bandwidth rates?

If your users are running the FileCloud Sync app on a slow network, when Sync transfers files it can quickly use up all the network bandwidth.

You can have your users set individual bandwidth rates by following instructions in the Users Guide:

➔ [Set Bandwidth Rate Limits for Sync](#)

Or you can use centralized device management to limit bandwidth rates for all clients.

⚠ If Centralized Device Configuration is set, the user will not be allowed to change the settings from the User Portal. The user will see the following message:

*Centralized Configuration is being applied. Bandwidth Settings cannot be changed. Please contact your administrator for assistance.*

The XML code will include the following lines:

```
<cloudsync>
  <globalbwforupload></globalbwforupload>
  <globalbwfordownload></globalbwfordownload>
  <altbwforupload></altbwforupload>
  <altbwfordownload></altbwfordownload>
  <altbwfromtime></altbwfromtime>
  <albtwtotime></albtwtotime>
  <altbwschedule_dayofweek></altbwschedule_dayofweek>
</cloudsync>
```

XML Tag	Value	Example
globalbwforupload	Specifies the bandwidth limit when uploading files from the client to the server in terms of KB only. This limit can be different from the download limit.	<globalbwforupload>100</globalbwforupload>
globalbwfordownload	Specifies the bandwidth limit when downloading files from the server to the client in terms of KB only. This limit can be different from the upload limit.	<globalbwfordownload>50</globalbwfordownload>
altbwforupload	Specifies that alternative settings should be used instead of the global bandwidth limit when uploading files from the client to the server in terms of KB only.	<altbwforupload></altbwforupload>
altbwfordownload	Specifies that alternative settings should be used instead of the global bandwidth limit when downloading files from the server to the client in terms of KB only.	<altbwfordownload></altbwfordownload>
altbwfromtime	Specifies the starting time when the alternative settings should be used instead of the global bandwidth limit. Time must be expressed in the format HH:MM:SS	<altbwfromtime>16:45:00</altbwfromtime>
albtwtotime	Specifies the ending time when the alternative settings should be used instead of the global bandwidth limit. Time must be expressed in the format HH:MM:SS	<albtwtotime>24:00:00</albtwtotime>

XML Tag	Value	Example
altbwschedule_dayofweek	<p>Specifies the days of the week when the alternative settings should be used instead of the global bandwidth limit.</p> <p>This value can be any number such as: {-1, 0, 1, 2, 3, 4, 5, 6} where:</p> <ul style="list-style-type: none"> <li>• -1 means every day</li> <li>• 0 means Sunday</li> <li>• 1 means Monday</li> <li>• and so on..</li> </ul>	<altbwschedule_dayofweek>3</altbwschedule_dayofweek>



If *altbwforupload* or *altbwfordownload* is specified but *altbwfromtime* and *altbwto* are missing, then the bandwidth values will not be set. A "Missing RMC params" message will be displayed in the log file.

### What is the XML code for Active Sync Hours?

As an administrator, you can enable or disable a client's ability to set a schedule for when the Sync app runs.

Users set their schedule from the Sync dashboard. See Limit Sync To a Schedule.

⚠ If Active Sync Hours is disabled, Sync will be active and function normally unless the user clicks the Pause button to stop it.

Use the following XML code to allow or disable the Active Sync Hours checkbox and settings.

```
<cloudsync>
  <timeactivecontrolsset></timeactivecontrolsset>
  <activesync_daysofweek></activesync_daysofweek>
  <activesync_timeofday></activesync_timeofday>
</cloudsync>
```

XML Tag	Value	Example
timeactivecontrolsset	1 = enabled 0 = disabled	<timeactivecontrolsset>1</timeactivecontrolsset>

XML Tag	Value	Example
activesync_daysofweek	Any number {-1, 0, 1, 2, 3, 4, 5, 6} -1 = Everyday 0 = Sunday 1 = Monday ...etc.	<activesync_daysofweek>5</activesync_daysofweek>
activesync_timeofday	Use the format HH:MM:SS-HH:MM:SS	<activesync_timeofday>8:00:00-20:00:00</activesync_timeofday>

### What XML settings allows users to modify folders?

When device configuration xml is included for Sync, whether or not the settings included affect selective Sync folder, network folder, or backup folders, by default, users are prevented from configuring these folder types in the Sync application.

As an administrator, you can override this, and allow Sync users to modify the following folders:

- Selective Sync folders
- Network folders
- Backup folders

The XML Settings for enabling or disabling the ability to modify these folders are:

XML Tag	Value	Example
allowuserconfigforlimitsync	0 = user cannot modify Selective Sync folders and any <i>limitfolder</i> setting, if present in xml, is applied. 1 = user can modify Selective Sync folders and this overrules any <i>limitfolder</i> settings.	<allowuserconfigforlimitsync>1</allowuserconfigforlimitsync>
allowuserconfigforwfolders	0 = user cannot modify Network folders and any <i>offlinefolder</i> setting configured for Network folders, if present, is applied. 1 = user can modify Network folders and this overrules any <i>offlinefolder</i> setting configured for Network folders.	<allowuserconfigforwfolders>1</allowuserconfigforwfolders>
allowuserconfigforbackup	0 = user cannot modify the Backup folder and any <i>offlinefolder</i> setting configured for Backup folders, if present, is applied. 1 = user can modify the folder and this overrules any <i>offlinefolder</i> setting configured for Backup folders	<allowuserconfigforbackup>1</allowuserconfigforbackup>

## Scenarios

If xml device config settings are present, whether or not they apply to selective sync or offline folders, they must be overridden to allow users to modify folder settings in the Sync client app.

### Controlling modifications to selective sync folders

limitfolders	allowuserconfig orlimitsync	Sync User's Access
/john/folder1 /john/ folder2	1	Although limit folders are present, because <i>allowuserconfigforlimitsync</i> is set to allow modifications: <ul style="list-style-type: none"> <li>• <i>limitfolder</i> settings will NOT be applied</li> <li>• Users CAN modify their selective sync folders</li> </ul>
/john/folder1 /john/ folder2	0	Because limit folders are present, AND <i>allowuserconfigforlimitsync</i> is set to disable modifications: <ul style="list-style-type: none"> <li>• <i>limitfolder</i> settings will BE applied</li> <li>• Users CANNOT modify their selective sync folders</li> </ul>
<i>None set but other settings are present</i>	1	Because <i>allowuserconfigforlimitsync</i> is set to allow modifications: <ul style="list-style-type: none"> <li>• Users CAN modify their selective sync folders, irrespective of any other settings in the config</li> </ul>
<i>None set but other settings are present</i>	0	Because <i>allowuserconfigforlimitsync</i> is set to disable modifications: <ul style="list-style-type: none"> <li>• Users CANNOT modify their selective sync folders</li> </ul>

### Controlling modifications to selective network folders

offline folders	allowuserconfig ornwfolders	Sync User's Access
/EXTERNAL/ folderA	1	Because offline folders (configured as Network Folders) are present, AND <i>allowuserconfigornwfolders</i> is set to enable modifications: <ul style="list-style-type: none"> <li>• <i>offlinefolder</i> setting configured for Network Folders, will NOT be applied</li> <li>• Sync users CAN modify Network Folders</li> </ul>
/EXTERNAL/ folderA	0	Because offline folders (configured as Network Folders) are present AND <i>allowuserconfigornwfolders</i> is set to disable modifications: <ul style="list-style-type: none"> <li>• <i>offlinefolder</i> setting configured for Network folders, will BE applied</li> <li>• Sync users CANNOT modify Network Folders</li> </ul>

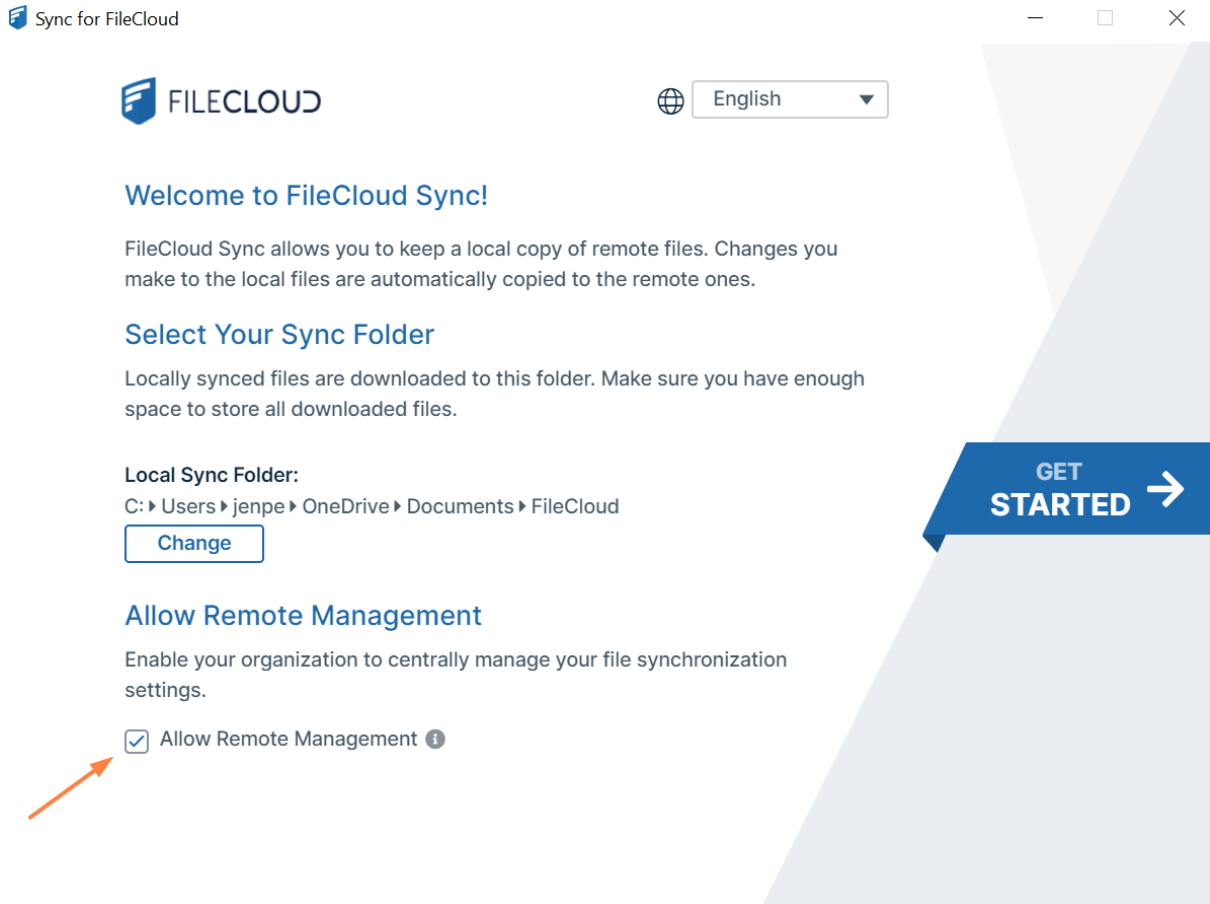
<i>None set but other settings are present</i>	1	Because <i>allowuserconfigfornewfolders</i> is set to enable modifications: <ul style="list-style-type: none"> <li>• Sync users CAN modify Network Folders, irrespective of any other settings in the config.</li> </ul>
<i>None set but other settings are present</i>	0	Because <i>allowuserconfigfornewfolders</i> is set to disable modifications: <ul style="list-style-type: none"> <li>• Sync users CANNOT modify Network Folders</li> </ul>

### Controlling modifications to selective backup folders

offline folders	allowuserconfigforbackup	Sync User's Access
C:\data\local	1	Because offline folders (configured for backup) are present, AND <i>allowuserconfigforbackup</i> is set to enable modifications: <ul style="list-style-type: none"> <li>• <i>offlinefolder</i> setting configured for Backup folders, will NOT be applied</li> <li>• Sync users CAN modify backup folders</li> </ul>
C:\data\local	0	Because offline folders (configured for backup) are present AND <i>allowuserconfigforbackup</i> is set to disable modifications: <ul style="list-style-type: none"> <li>• <i>offlinefolder</i> setting configured for Backup folders, will BE applied</li> <li>• Sync users CANNOT modify backup folders</li> </ul>
<i>None set but other settings are present</i>	1	Because <i>allowuserconfigforbackup</i> is set to enable modifications: <ul style="list-style-type: none"> <li>• Sync users CAN modify backup folders, irrespective of any other settings in the config.</li> </ul>
<i>None set but other settings are present</i>	0	Because <i>allowuserconfigforbackup</i> is set to disable modifications: <ul style="list-style-type: none"> <li>• Sync users CANNOT modify backup folders</li> </ul>

### How do I prevent users from overriding remote management?

In the Sync client, by default, there is a setting on the initial window of the log-in wizard: **Allow Remote Management**.



This setting is also available in the Settings window.

- It allows Sync users to manage their Sync application by overriding an Administrator's settings
- In some cases, administrators want to disable the toggle by hiding it.
- In FileCloud Server version 19.1 and later, an administrator can hide the setting by adding a registry key called *allowcentralmgmtusermodify*
- When set to 0, the central management option is disabled and can no longer be changed by users

#### To add the registry key:

1. Add a registry key under:

```
Computer\HKEY_LOCAL_MACHINE\SOFTWARE\CodeLathe\FileCloud\DefaultCfg
```


2. Name the registry key:

```
allowcentralmgmtusermodify
```


3. Restart the computer.

## Device Configuration XML For Windows Drive

Client Device configuration settings can be configured remotely by specifying the configuration XML using 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.

### To set a FileCloud Drive device configuration in a policy:













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.

## Policies

New Policy

Create a new policy

New Policy

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

Page 1 of 1

2 rows

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 following remote device configuration XML in **Device Configuration** replacing **<!-- XML for Windows Drive -->** with any parameters from the table below.

```
<xml>
```

```
<winclouddrive>
  <!-- XML for Windows Drive -->
</winclouddrive>
</xml>
```

Effective Policy: "Global Default Policy" ✕

General   2FA   User Policy   Client Application Policy   **Device Configuration**   Notifications

Some policy settings will not be applicable for Guest and External users.


Device Configuration  
Client Configuration

```
<xml>
  <winclouddrive>
    <!-- XML for Windows Drive →
  </winclouddrive>
</xml>
```

Customize default configuration for any of your client applications in valid XML.

Cancel   **Reset**   Save

Supported parameters for FileCloud Drive. All parameters are optional. Add one of more of these parameters (as XML tags) in the <winclouddrive> tags in the XML.

Parameter (XML Tag)	Value	Example
maxdownloadsizein mb	Assigns the maximum single file download limit to the supplied value. <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;">  The download limit does not apply to the following file types: .txt, .rtf, .doc, .docx, .xls, .xlsx, .ppt, .pptx, and .indd.           </div>	<pre>&lt;maxdownloadsizein mb&gt;100&lt;/maxdownloadsizein mb&gt;</pre>
mountpoint	Set the mount point to use to mount filecloud drive in windows. This will only take effect on drive restart	<pre>&lt;mountpoint&gt;H:&lt;/mountpoint&gt;</pre>

Parameter (XML Tag)	Value	Example
driveloginmode	Setting this to "0" will cause filecloud drive to use username/password to log into the Filecloud server. Setting this value to "1" will cause drive to use device code authentication mode	<driveloginmode>1</driveloginmode>
drivelockonupdate	Setting this value to 1 will enable automatic lock on edit function in FileCloud Drive. Setting this to 0 will disable the drive's lock on edit function	<drivelockonupdate>1</drivelockonupdate>
drivemutemessages	Setting this value to 1 will disable system tray notifications being shown to the user.	<drivemutemessages>1</drivemutemessages>
driveopenexploreronstartup	Setting this value to 1 will automatically open explorer window when drive starts up and 0 will disable it.	<driveopenexploreronstartup>1</driveopenexploreronstartup>
drivedefaultstorageingb	Increases the storage space of the FileCloud Drive user. Default = 15. The configuration becomes effective after FileCloud Drive is restarted. <b>Note:</b> The FileCloud user must have unlimited storage (User Storage Quota is set to 0 in user policy) for the value to be applied.	<drivedefaultstorageingb>15</drivedefaultstorageingb>
checkupdates	Setting this value to 1 will enable automatic checking for new versions of FileCloudDrive and setting this value to 0 will disable it.	<checkupdates>1</checkupdates>
cachelocation	The default cache path is %APPDATA%/FileCloudDrive/. This path can be changed to a different location using this key. Any path set must be a valid path on the computer where FileCloudDrive runs.	<cachelocation>E:\DriveCache<cachelocation> or <cachelocation>\${HOME}\DriveCache<cachelocation> or <cachelocation>C:\somepath\\${USERID}\DriveCache</cachelocation>

Parameter (XML Tag)	Value	Example
disableprecaching	Setting this value to 1 disables precaching. If many Drive users have access to a large data structure, the FileCloud server may experience a high load. This can be avoided by deactivating precaching. However, folder contents will no longer be cached in Drive which can lead to longer response times.	<disableprecaching>1</disableprecaching>
disableautologin	By default, once a drive is mounted, the authentication will be reused on every FileCloudDrive start ups. Setting this key to 1 will require authentication from user on every start up.	<disableautologin>1</disableautologin>
currentlanguage	By default English will be the default language. This key can be used to set the default language for FileCloudDrive. The current values that are supported are english, dutch, french	<currentlanguage>french</currentlanguage>

Variable	Notes
\${USER}	Replaced with current logged in user name from the Operating System
\${HOME}	Replaced with the location of the current user's Home Path
\${USERID}	Replaced with the currently logged in FileCloud user account name

## Device Configuration XML for Desktop Edit

Client Device configuration settings can be configured remotely by specifying the configuration XML using 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.

### To set FileCloud Desktop Edit device configuration in a policy:

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.

## Policies

New Policy

Create a new policy

New Policy

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

<< < Page  of 1 > >>  
 2 rows

- Edit the policy of the users whose client device settings you want to modify.
- Click the **Device Configuration** tab.
- Paste or type in the following remote device configuration XML in **Device Configuration** replacing **<!-- XML for Desktop Edit -->** with any parameters from the table below

```
<xml>
  <desktopedit>
    <!-- XML for Desktop Edit -->
  </desktopedit>
</xml>
```

Effective Policy: "Global Default Policy" ✕

General
2FA
User Policy
Client Application Policy
Device Configuration
Notifications

Some policy settings will not be applicable for Guest and External users.

Device Configuration

Client Configuration

```
<xml>
  <desktopedit>
    <!-- XML for Desktop Edit -->
  </desktopedit>
</xml>
```

Customize default configuration for any of your client applications in valid XML.

Cancel
Reset
Save

Supported parameters for FileCloud Desktop Edit. All parameters are optional. Add one or more of these parameters (as XML tags) in the <desktopedit> tags in the XML.


Parameter (XML Tag)	Value	Example
lockfiles	0/1 - Enable or Disable autolocking of files	<lockfiles>1</lockfiles>
runatstartup	0/1 - Enable or Disable running application at OS startup	<runatstartup>1</runatstartup>
mutenotifications	0/1 - Enable or Disable notifications	<mutenotifications>1</mutenotifications>

## Device Configuration XML for FileCloud Desktop for macOS

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.

## Policies

New Policy New Policy

Create a new policy

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

<< < Page  of 1 > >>  
 2 rows

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

Effective Policy: "Global Default Policy" ✕

General
2FA
User Policy
Client Application Policy
Device Configuration
Notifications

Some policy settings will not be applicable for Guest and External users.

Device Configuration  
Client Configuration

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

Customize default configuration for any of your client applications in valid 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 <b>information</b> is the least detailed, and <b>trace</b> is the most detailed.	"information" default "debug" "trace"

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

**Example:**

The code below shows example settings:

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

```

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

```

In this example:

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

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

## Device Configuration XML for FileCloud Desktop for Windows

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.

## Policies

New Policy

Create a new policy

New Policy

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

<< < Page  of 1 > >>  
 2 rows

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>
  <fileclouddesktopwindows>
    <setting>
      <key>runatstartup</key>
      <value>1</value>
      <default>1</default>
    </setting>
  </fileclouddesktopwindows>
</xml>

```

Effective Policy: "Global Default Policy" ✕

General
2FA
User Policy
Client Application Policy
Device Configuration
Notifications

Some policy settings will not be applicable for Guest and External users.

Device Configuration

Client Configuration

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

Customize default configuration for any of your client applications in valid XML.

Cancel
Reset
Save

<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 <b>information</b> is the least detailed, and <b>trace</b> is the most detailed.	"information" default "debug" "trace"

language	Language of the FileCloud Desktop for Windows user interface.	<table border="1"> <thead> <tr> <th data-bbox="887 300 1136 389">Value</th> <th data-bbox="1136 300 1385 389">Language</th> </tr> </thead> <tbody> <tr> <td data-bbox="887 389 1136 472">nl</td> <td data-bbox="1136 389 1385 472">Dutch</td> </tr> <tr> <td data-bbox="887 472 1136 555">en (default)</td> <td data-bbox="1136 472 1385 555">English</td> </tr> <tr> <td data-bbox="887 555 1136 638">de</td> <td data-bbox="1136 555 1385 638">German</td> </tr> <tr> <td data-bbox="887 638 1136 721">es</td> <td data-bbox="1136 638 1385 721">Spanish</td> </tr> <tr> <td data-bbox="887 721 1136 804">pt</td> <td data-bbox="1136 721 1385 804">Portuguese</td> </tr> <tr> <td data-bbox="887 804 1136 887">fr</td> <td data-bbox="1136 804 1385 887">French</td> </tr> <tr> <td data-bbox="887 887 1136 969">ar</td> <td data-bbox="1136 887 1385 969">Arabic</td> </tr> <tr> <td data-bbox="887 969 1136 1052">it</td> <td data-bbox="1136 969 1385 1052">Italian</td> </tr> <tr> <td data-bbox="887 1052 1136 1135">ru</td> <td data-bbox="1136 1052 1385 1135">Russian</td> </tr> </tbody> </table>	Value	Language	nl	Dutch	en (default)	English	de	German	es	Spanish	pt	Portuguese	fr	French	ar	Arabic	it	Italian	ru	Russian
Value	Language																					
nl	Dutch																					
en (default)	English																					
de	German																					
es	Spanish																					
pt	Portuguese																					
fr	French																					
ar	Arabic																					
it	Italian																					
ru	Russian																					
mutenotifications	Suppress all notifications on FileCloud Desktop.	0 (disabled, notifications are shown) default 1 (enabled, notifications are not shown)																				

**Example:**

The code below shows example settings:

```

<xml>
<fileclouddesktopwindows>
  <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.

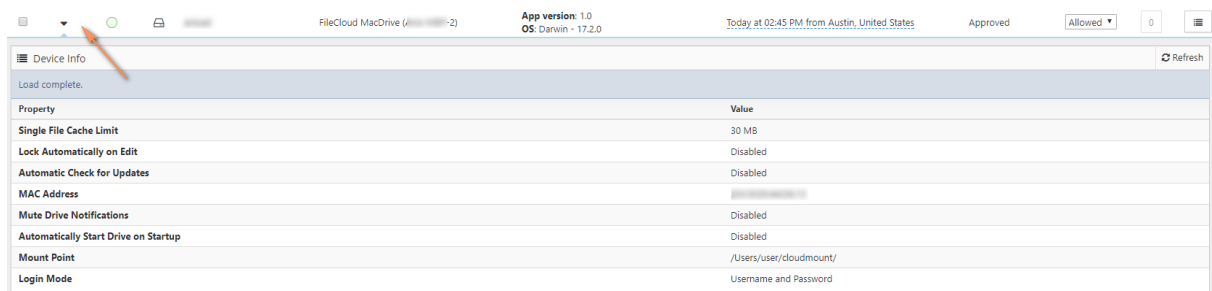
If a key is not supported or a value is incorrect, the application skips it and logs a warning message.

## Viewing Client Information

Managing client devices requires the ability to view client information about:

- Health
- State

Figure 1. Device Information



Property	Value
Single File Cache Limit	30 MB
Lock Automatically on Edit	Disabled
Automatic Check for Updates	Disabled
MAC Address	
Mute Drive Notifications	Disabled
Automatically Start Drive on Startup	Disabled
Mount Point	/Users/user/cloudmount/
Login Mode	Username and Password

## What do you want to view?

### Client Health Information




The information shown for each client will depend upon the client type (Sync, Drive, Outlook Add In, iOS, Android, etc.)

To show information related to a device:

1. In the Devices table, click the device.

## Client State Information

Each client now has health information represented by the icon in the client table.

	Health color	Information
	Green	Healthy client
	Yellow	Some problems reported by client
	Red	Critical problem reported by client

## Requesting Client Log Files

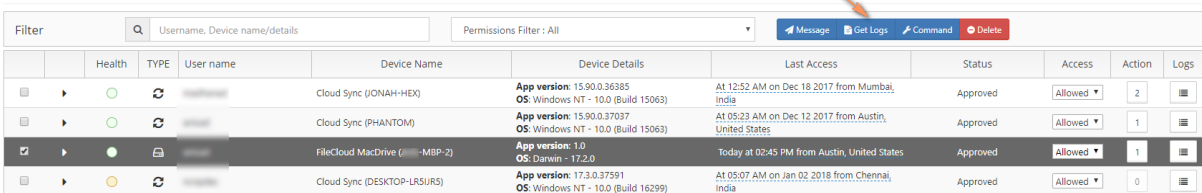
Administrators can request clients to upload their latest log files to the server so the administrator can view any errors for troubleshooting.













To get logs, select the device in the list and click on "Get Logs" button.

The logs are uploaded by the client

- When the client connects to the FileCloud server (as a part of login operation)
- If the client is already connected, then it processes the get logs command periodically and uploads the logs to the server.

☐ Manage Devices



Filter	Health	TYPE	User name	Device Name	Device Details	Last Access	Status	Access	Action	Logs
				Cloud Sync (DONAH-HEX)	App version: 15.90.0.36385 OS: Windows NT - 10.0 (Build 15063)	At 12:52 AM on Dec 18 2017 from Mumbai, India	Approved	Allowed ▾	2	
				Cloud Sync (PHANTOM)	App version: 15.90.0.37037 OS: Windows NT - 10.0 (Build 15063)	At 05:23 AM on Dec 12 2017 from Austin, United States	Approved	Allowed ▾	1	
<input checked="" type="checkbox"/>				FileCloud MacDrive (MBP-2)	App version: 1.0 OS: Darwin - 17.2.0	Today at 02:45 PM from Austin, United States	Approved	Allowed ▾	1	
				Cloud Sync (DESKTOP-LRSURS)	App version: 17.3.0.37591 OS: Windows NT - 10.0 (Build 16299)	At 05:07 AM on Jan 02 2018 from Chennai, India	Approved	Allowed ▾	0	

The get logs request is queued to the client the next time the client is online and processes server commands it will upload the logs to it's logs folder.

## Blocking and Remotely Wiping a Client Device

Administrators can selectively block a specific client device from logging into the FileCloud server using FileCloud's RMC function.

In addition to Blocking a Client Device from logging in, Administrator can also wipe FileCloud folders in the remote device.

When a client device is blocked (or blocked with remote wipe action), it will be executed one of the following two ways

1. If the client is not connected, the block (and remote wipe) will happen when it tries to log into the server
2. If the client is connected, the block and remote wipe will occur and the client will automatically exit out.

#### **Steps to block (but not wipe remote data) in a client device**

1. Log on to Administration Portal
2. Click on "**Devices**" on the left navigation panel
3. Locate the client device to be blocked and under the "**Permissions**" column, Change the value to "**Blocked**"
4. In the "**Confirm**" dialog, select "**NO**" to just block but not remote wipe the client device

#### **Steps to block and wipe remote data in a client device**

1. Log on to Administration Portal
2. Click on "**Devices**" on the left navigation panel
3. Locate the client device to be blocked and under the "**Permissions**" column, Change the value to "**Blocked**"
4. In the "**Confirm**" dialog, Check the "Remote Wipe" button to block and remote wipe downloaded data in the client device

The remote wipe will have the following effect on each of the clients

- FileCloud Drive: Cache folder data will be deleted and application will log out
- FileCloud Sync: Synced data will be deleted and application will log out
- iOS and Android: Downloaded data in "This Device" will be deleted and will log out of the server

## **Sending a Message to a Client's Display**

Administrators can display a short message on the remote client using the "Add message" feature.

The entered message(s) will be displayed when the remote client is connected to the FileCloud instance. If more than one message is queued to a device, they will be

displayed in the order it was entered. The messages will be shown only once per client and during

Message will be shown

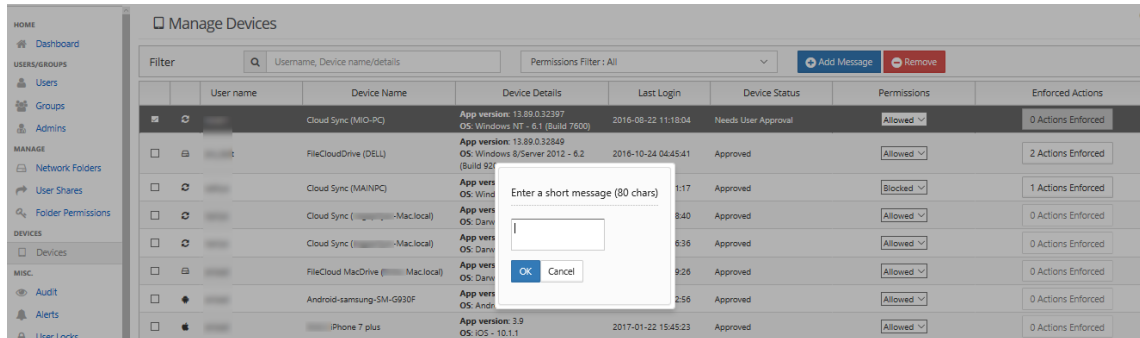
- When the client connects to the FileCloud server (as a part of login operation)

- If the client is already connected, then it will retrieve the message periodically and display it to the user

Steps to add message

1. Log on Administration Panel
2. Select one or more devices using the checkbox on the left most column of a device record
3. Click the **"Add Message"** button.

The message appears on the remote client.



## iOS Device Management

Administrators can configure how mobile users with an iOS device interact with FileCloud.

### Configuring Automatic Camera Uploads

iOS users can automatically upload photos and videos from their mobile device without manually having to upload.

**⚠** As an administrator, you must first enable this feature before users can configure it on their mobile device.

#### Why would I enable this feature?


- This is a very convenient feature and it mobile users to know that your photos and videos are always saved in a safe location.
- Instead users saving all of their work files on their mobile device, they can save them to the FileCloud.
- Mobile users can spend time constantly managing their images/videos to free up more space unless they are able to save them to FileCloud.
- If you are concerned about privacy and security, work-related files and photos are stored securely in FileCloud.

**💡** Keep in mind that with the amount of photos and videos generated by the mobile devices, the storage size can run out quickly.

**To enable automatic camera uploads:**

**Note:** The **Allow Sync Apps** setting in Server Settings must be enabled for **Allow camera uploads** to work. By default **Allow Sync Apps** is enabled.

1. 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.

2. Enable **Allow camera uploads**.

## Endpoint Backup [Reset to defaults](#)

**Allow users to back up**   
Enable users to back up with FileCloud Sync app.

**Allow camera uploads**   
Allow automatic backup of photos and videos from mobile devices.

**Backup path**  
Root storage path for user backups. Admin can override in user details. If 'My Files' is disabled, admin must specify a new path in user details for each user.

**Backup notification email**  
Email for notification of backup status

# Search in the Admin Portal

## FileCloud's Federated Search

In the Admin Portal, FileCloud includes a federated search that looks for matches in file names, folder names, file content, and metadata. It is also capable of searching for complex strings using regular expressions.



The ability to search the entire FileCloud system for files and folders is available in FileCloud Server version 17.3 and later.  
The PCRE search is available in FileCloud Version 21.1 and higher.

As an administrator, you may need to find a file or folder quickly in a large data set.

- FileCloud supports searching the entire FileCloud system for files and folders with the Federated Search feature.
- The search may be a basic file or folder name search.
- Search results may contain matches from both managed storage and network folders.
- Search results can be downloaded, and if applicable, previewed.
- Search results cannot be copied, moved or deleted.

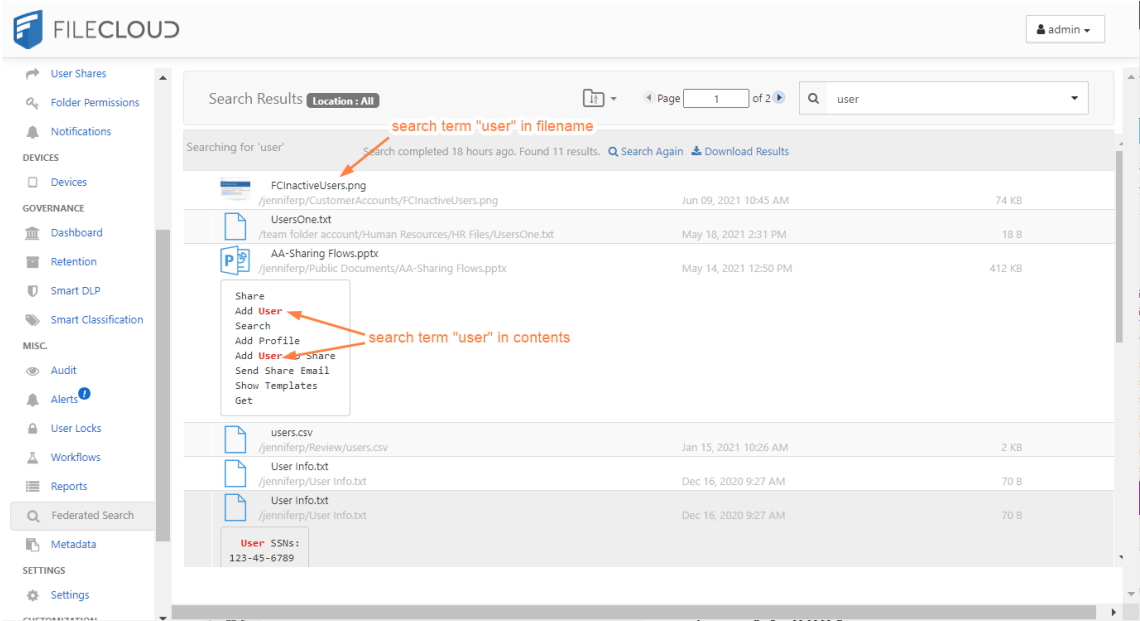
### Basic Search

A basic search searches for the search term in file and folder names, and if content search is enabled, in the content of files.

The following procedure assumes that you have enabled full content search for documents.

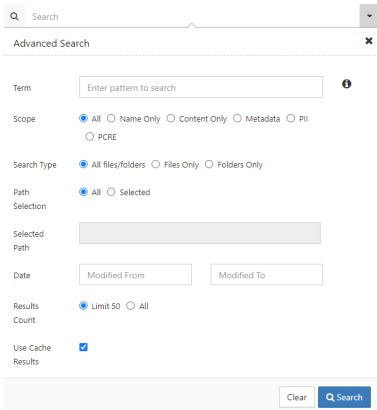
#### To perform a basic search on the entire site:

1. From the left navigation panel of the Admin Portal, under **Misc.**, click **Federated Search**.
2. On the search screen, in the search box, type the search term and press enter.  
Files and folders with the search term in their names as well as files containing text that contains the search term are listed as search results. Text in files containing the search terms is shown.



**Advanced Searches**

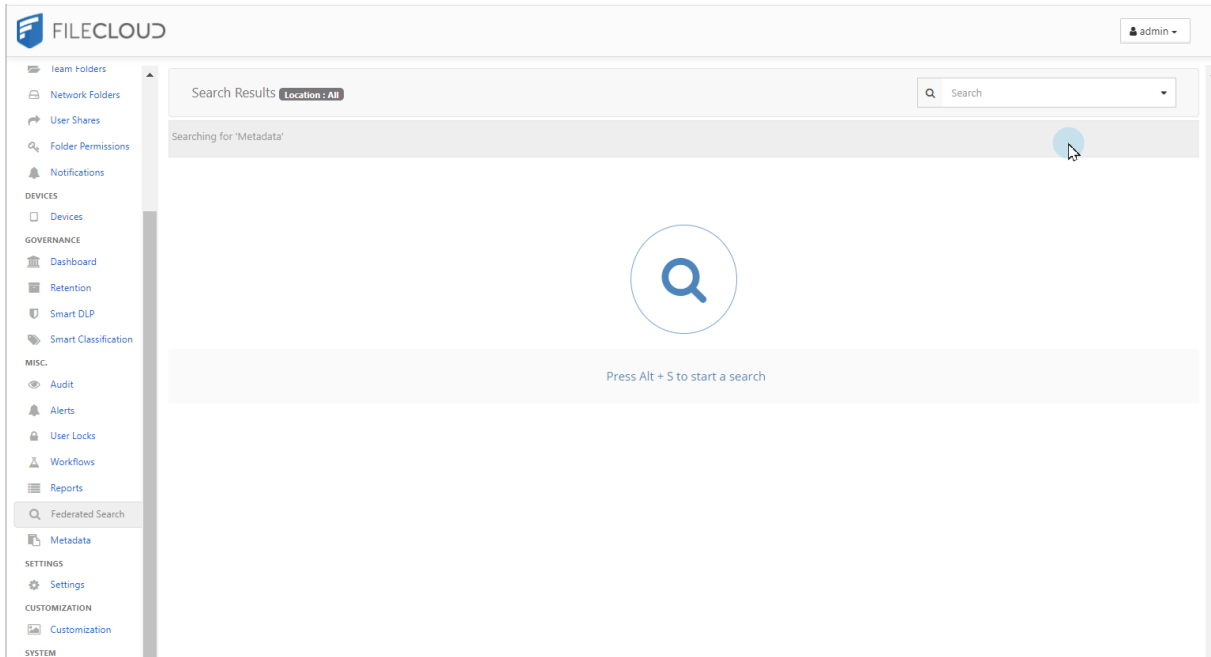
An advanced search lets you search on the search term and any of the options shown and listed below:

Advanced search box	Search options
	<p><b>Term</b> - (required) The string to search for.</p> <p><b>Scope</b> - Which content to search.</p> <p><b>All</b> - File and folder names if content search is not enabled. File and folder names and content in files when content search is enabled. See <b>All search</b>, below.</p> <p><b>Name Only</b> - File and folder names only. See <b>Name only search</b>, below.</p> <p><b>Content Only</b> - Content in files only. See <b>Content only search</b>, below.</p> <p><b>Metadata</b> - Content stored in metadata fields only. You must define conditions to search for instead of entering a search term. See <b>Metadata search</b>, below.</p> <p><b>PII</b> - Personally identifiable information in content only. You must select a PII type instead of entering a search term. See <b>PII and PCRE searches</b>, below.</p> <p><b>PCRE</b> - Only appears when the <b>PCRE mode</b> setting is enabled. Searches on regular expressions. See <b>PII and PCRE searches</b>, below.</p> <p><b>Search Type</b> - Options are <b>All files/folders</b>, <b>Files Only</b>, and <b>Folders Only</b>. Not applicable for Metadata search.</p> <p><b>Path Selection</b> - Either <b>All</b> or <b>Selected</b>. If <b>Selected</b> is chosen, <b>Selected Path</b> is enabled for you to enter a path.</p> <p><b>Selected Path</b> - When <b>Selected</b> is chosen for <b>Path Selection</b>, this is enabled. Enter the path to search on.</p> <p><b>Date</b> - Range of Last Modified dates to search on.</p> <p><b>Results Count</b> - Number of results to return. Choose <b>Limit 50</b> or <b>All</b>. Use <b>Limit 50</b> to reduce lengthy search times.</p> <p><b>Use Cache Results</b> - When checked, this returns any saved results of the same search instead of performing the search again. This gives you faster results but does not take into account changes since the previous search.</p>

## All search

## All search

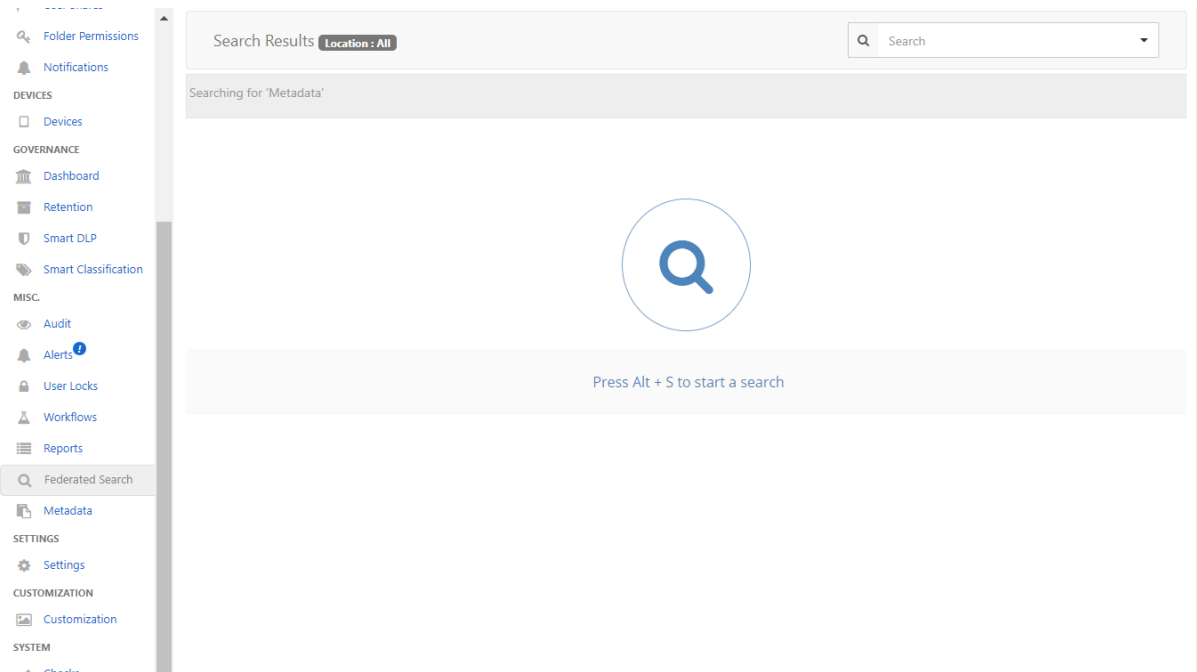
**All** is selected by default. This search looks for matches in file and folder names when content search is not enabled. It looks for matches in file and folder names and in the content of files when content search is enabled.



### Name only search

## Name Only search

When **Name Only** is selected, the search only looks for matches in file and/or folder names.



### Content only search

## Content Only search

When **Content Only** is selected, the search only looks for matches in the text of files.


To perform this search, your system must have full content search capability.



Content search hits are returned with the matching string highlighted except in the case of lengthy search results, where omitting highlighting achieves quicker response time.

Search Results

---



Press Alt + S to start a search

---

## Metadata search

### Metadata search

To perform a metadata search, select **Metadata** and define a condition specifying the metadata field value that you are searching for. In the example below, the search is configured to look for content


with the image orientation field set to horizontal.

)

admin

Search Results **Location : All** Search

Searching for 'Metadata'



Press Alt + S to start a search

---

## Audit Logs

FileCloud has extensive auditing support and every operation is logged.

As an administrator, you can use audit logs to quickly see what has changed on your FileCloud site, such as:

- Were any new accounts created recently
- How many clients are logged in
- What are users commonly searching for on the site
- How many files are being uploaded and downloaded

Since every operation is logged, the audit database entries can grow very large very quickly.

To manage log file growth, you can:

- Remove log entries using the Admin dashboard
- Limit what operations are logged
- Export log files to CSV as an archive

**Note: You can configure your system to prevent administrators from deleting audit log entries. See [Delete Audit Log Entries](#) below.**

💡 It is important to keep in mind that removing log entries from the Admin dashboard does removes them from the database. However, MongoDB does not release the space but keeps it for new entries to be added in the future. If you need to reclaim the space, you should compact the database.

## What do you want to do?

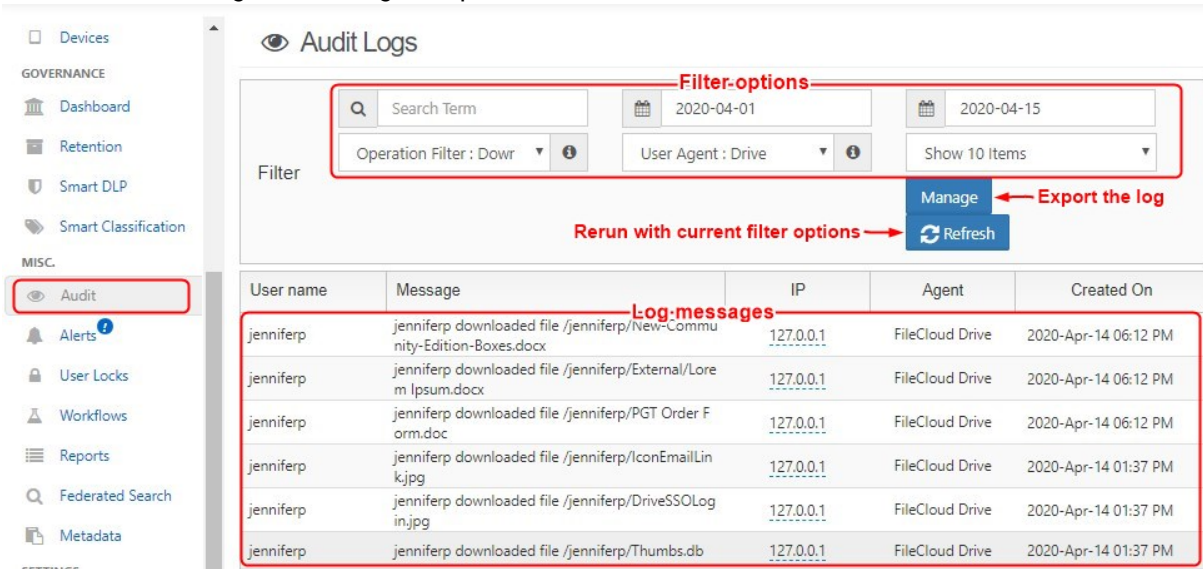
View Logs	<a href="#">View Audit Logs</a> <a href="#">Filter Audit Log Views</a>
Manage Logs	<a href="#">Delete Audit Log Entries</a> <a href="#">Configure What is Logged</a> <a href="#">Export Audit Logs</a>

## View Audit Logs

As an administrator, you can read log files as an important part of maintaining proper operation and ensuring system security of your FileCloud site.

- Log files can be extremely useful in troubleshooting issues
- Only an Administrator can read FileCloud log files

To view the audit log, in the navigation panel, click **Audit**.



At the top of the Audit Log screen are fields that enable you to filter log results. Below them, a **Manage** button opens a dialog box for exporting the log to a csv file and downloading it. A **Refresh** button regenerates the log with the current filter settings.

The main portion of the Audit Log screen lists the audit log entries. Each entry includes the following information:


<b>User name</b>	Name of the user account
<b>Message</b>	The descriptive message for the audit record For example, <i>USER1 logged in FAIL</i>
<b>IP address</b>	The IP from which the event occurred
<b>Agent</b>	Indicates how FileCloud was accessed. For example: <ul style="list-style-type: none"> <li>• Web browser</li> <li>• Sync</li> <li>• Drive</li> <li>• Mobile device</li> </ul>
<b>Created On</b>	The date and time when the event was logged

## Filter Audit Log Views

Since every operation is logged and displayed in the Audit screen, the display will show a lot of information and there may be times when you only want to see a specific event.

For example, if you want to see if a specific user was able to login but hundreds of operations are occurring on the server, finding your user may be difficult.

Therefore, you can search or filter your views to find the information you need.

 The audit log can also be sorted, trimmed, or filtered after exporting it to a CSV file. Exporting the audit log can also reduce the size taken up in the database.



Filtering your view of log entries does not trim or decrease the size of your log database.

If your log database is growing too large, you can:

[Export Audit Logs](#)

[Configure What is Logged](#)

[Delete Audit Log Entries](#)

## How do you want to filter the Audit log?

### By a search term

#### To filter the audit log by searching:

1. Open a browser and log in to the [admin portal](#).
2. From the left navigation panel, click **Audit**.
3. In the Search box, type in your key words.

### By start and end dates



#### To filter the audit log by date:

1. Open a browser and log in to the [admin portal](#).
2. From the left navigation panel, click **Audit**.
3. In the Filter Start Date box, select a date or type in a date in the following format: YYYY-MM-DD.
4. In the Filter End Date box, select a date or type in a date in the following format: YYYY-MM-DD.

### By an operation

The Audit log can be filtered by the following operations or actions that occur on the FileCloud server:

Operation	Description
All	Displays all operations logged by FileCloud Server This is the default filter.
Common	Displays 6 of the most commonly logged operations: <ul style="list-style-type: none"> <li>• create new account</li> <li>• login</li> <li>• create file or folder</li> <li>• upload file</li> <li>• download file or folder</li> <li>• share file or folder</li> </ul>
Deleted	Displays logs created when a file or folder was moved to the recycle bin on the FileCloud Server site
Uploaded	Displays logs created when a file or folder was uploaded to the FileCloud Server site
Downloaded	Displays logs created when a file or folder was downloaded from the FileCloud Server site
Metadata	Displays logs created when a file or folder's metadata was added, edited or removed
Files	Displays logs created when a change is made to all the files on the FileCloud Server site
Retention	Displays logs of retention policy actions.
DLP	Displays logs for failed DLP rules.
Moved	Displays logs created when a file or folder was moved to another location in FileCloud.
Virus removed	Displays logs created when antivirus scanned an upload and removed a virus.
No virus found	Displays logs created when antivirus scanned an upload and found no virus.
Automation Workflow	Displays logs created when a share approval request created by an automation workflow was approved or rejected. The log message includes the details: share owner, share path, share link, share type, share date, and share approver or rejector.

#### To filter the audit log by operation:

1. Open a browser and log in to the [admin portal](#).
2. From the left navigation panel, click **Audit**.
3. In **Operation Filter**, select an action or group of actions.

#### By an agent

An agent is any client or device that connects or communicates with FileCloud Server.

You can select from the following user agents:

- Web browser
- Sync
- Drive
- Outlook
- Office
- iOS
- Android
- Workflow
- Mqworker
- FileCloud Desktop

#### To filter the audit log by agent:

1. Open a browser and log in to the [admin portal](#).
2. From the left navigation panel, click **Audit**.
3. In **User Agent**, select a client or device.

## Configure What is Logged

There might be some operations that that you do not want logged because they fill your audit log with unnecessary information.


#### To configure what is logged:

##### Set a logging level

You can choose to set logging to one of the following levels:

- **Off** - Records nothing in the audit log files
- **Request** - Limits the logging to requests from agents or clients and the results of a request. Does not record the full response to the agent or client.
- **Full** - Records entries for all requests from agents or clients, the full response, and the and the results of the request.

#### To set a log level:

1. In the FileCloud admin portal's left navigation bar, scroll down and click **Settings**. Then, on the **Settings** navigation page, click **Admin**  . The **Admin** settings page opens.
2. Scroll down and locate **Audit log level**. Set it to **Off**, **Request**, or **Full**.

Recent access update frequency  
Frequency with which GeolP data is retrieved and updated in hours

24

**Audit log level**  
Audit log detail level

Request ▼

Off

**Request**

Full

**Auto archive audit database**  
Automatically export and delete audit records.  
NOTE: Cron Job must be set up and running

**Auto archive audit records frequency (in days)**  
Export and delete audit records that are older than (#days)  
(Auto archiving cannot run without this setting)

7

3. Click **Save**.

⚠ Remember that the information in audit logs can be extremely important for troubleshooting. Be careful not to exclude too much information from your log files.

## Export Audit Logs

You can export FileCloud Server audit logs as CSV files.

#### To export the audit logs:

1. Open a browser and log in to the Admin Portal.
2. From the left navigation panel, click **Audit**.
3. To open the Manage Audit Logs window, click **Manage**.
4. In **Start Date** and **End Date**, select dates or type in dates in the format YYYY-MM-DD.
5. Click **Export**.

User name	Message	Agent	Created On
mick1	mick1 logged in FAIL	Unknown	2018-Jan-23 12:37 AM
mick1	mick1 logged in FAIL	Unknown	2018-Jan-23 12:21 AM
mick1	mick1 logged in FAIL	Unknown	2018-Jan-22 11:53 PM
mick1	mick1 logged in FAIL	Unknown	2018-Jan-22 11:35 PM
mick1	mick1 logged in FAIL	Unknown	2018-Jan-22 11:22 PM
mick1	mick1 logged in FAIL	Unknown	2018-Jan-22 10:51 PM
mick1	mick1 logged in FAIL	Unknown	2018-Jan-22 10:38 PM
mick1	mick1 logged in FAIL	Unknown	2018-Jan-22 10:07 PM
admin (admin)	admin (admin) logged in OK	Web browser	2018-Jan-22 09:38 PM
mick1	mick1 logged in FAIL	Unknown	2018-Jan-22 09:35 PM

## Delete Audit Log Entries



### Admin Audit Log Deletion

Admins can prohibit other admins from deleting audit logs.

If you need to you can remove entries from the log file manually or configure an automatic archival and deletion of log entries.



It is important to keep in mind that removing log entries from the Admin dashboard also removes them from the database. However, MongoDB does not release the space but keeps it for new entries to be added in the future.

Some reports, such as reports on file actions and failed logins, get their data from the audit log. These reports only include events that are in the audit logs when you run the report. See Custom Reports for information about specific reports

## How do you want to remove Audit log entries?

### Manually delete entries

To manually remove audit log entries:

1. In the FileCloud admin portal's left navigation bar, scroll down and click **Misc > Audit**.

2. On the **Audit Logs** window, click **Manage**.

**Manage Audit Logs** ×

---

Start Date (Optional)

End Date (Required)

---

3. In **Start Date**, select a date or type in a date in the following format: YYYY-MM-DD. If you do not specify a start date, the deletion will occur for the very first log entry until specified End Date.
4. In **End Date**, select a date or type in a date in the following format: YYYY-MM-DD.
5. Click **Delete**.
6. On the **Confirm** dialog box, click **OK**.

# FileCloud Alerts

FileCloud Alerts are available in FileCloud's Admin portal.

This page tracks all unhandled exceptions, system error messages generated in FileCloud. The Alerts page shows information about the various errors encountered.

Depending on the error, you may need to take steps to correct the problem. For example, if alerts indicate that system is frequently running out of memory, then system memory may need to be increased.

On the Manage alerts page, you can filter by type of alert:



You can also remove individual or all alerts from the screen.

To view alerts:

1. Log into the Administration portal.
2. On the left navigation panel, click **Alerts**.

The Manage alerts page opens:

	Date	Severity	Description
<input type="checkbox"/>	2025-Nov-19 03:55 AM	Warning	Email Send Failed SMTP Error: The following recipients failed: admin@example.com: unable to verify sender address.
<input type="checkbox"/>	2025-Nov-19 12:00 AM	Warning	Encryption daily check found system partially encrypted.
<input type="checkbox"/>	2025-Nov-18 04:51 AM	Warning	Email Send Failed SMTP Error: The following recipients failed: team200@filecloud.localhost: unable to verify sender address.
<input type="checkbox"/>	2025-Nov-18 04:50 AM	Warning	Email Send Failed SMTP Error: The following recipients failed: team11@filecloud.com: unable to verify sender address.
<input type="checkbox"/>	2025-Nov-18 04:50 AM	Warning	Email Send Failed SMTP Error: The following recipients failed: team101@teams.com: unable to verify sender address.
<input type="checkbox"/>	2025-Nov-18 04:50 AM	Warning	Email Send Failed SMTP Error: The following recipients failed: dwadwa@gmail.com: unable to verify sender address.
<input type="checkbox"/>	2025-Nov-18 04:50 AM	Warning	Email Send Failed SMTP Error: The following recipients failed: guest@ext.pl.com: unable to verify sender address.
<input type="checkbox"/>	2025-Nov-18 04:50 AM	Warning	Email Send Failed SMTP Error: The following recipients failed: edson.horacio+dev2@filecloud.com: unable to verify sender address.

## File Content Heuristic Engine

Ransomware is a type of malware that an attacker uses to infiltrate your system and make your files inaccessible, usually by encrypting them. The attacker then demands that you pay a ransom to decrypt your files.

A heuristic engine can help prevent ransomware from entering your system by scanning files for characteristics that are often present in malicious files. FileCloud includes a heuristic engine that looks for files that identify their content inaccurately, a method sometimes used to trick users into opening files containing ransomware. For example, FileCloud's heuristic engine can detect if a file identifies itself as a basic text or image file, but includes code that is not normally present in these types of files.

The FileCloud heuristic engine is available to you, but to use it, you must add it to a [workflow](#) in your system by choosing a **Verify file integrity** action. When a file fails the integrity check, the workflow can either delete the file or send a notification.

### To create a workflow that uses the heuristic engine to validate uploaded files:

1. In the admin portal, in the navigation panel, click **Workflows**.
2. In the **Manage Workflows** screen, click **Add Workflow**.  
The **Create New Workflow** dialog box opens.
3. To perform the check on every file that is uploaded for the first time, in the **IF Condition** drop-down list, choose **If a file is created**.

**Note:** To also apply the condition to files that are re-uploaded, add a verify file integrity action with the condition **If a file is updated**.

4. Click **Next**.  
The next window prompts you to enter parameters for the workflow.
5. Since you want to scan all uploaded files, set **parent\_folder\_path\_string** to `/`, which indicates all files. The other parameters are optional, and you can exclude them.


## Create New Workflow



Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parent_folder_path_string":"/"
}
```



This condition will be triggered when a file is created.

**parent\_folder\_path\_string:** path of the folder as shown below

**use\_regex (optional):** specifies whether path has a regex format

**exclude (optional):** specifying this parameter will result in excluding the supplied path matches

```
{
  "parent_folder_path_string":"/userid/somepath",
  "use_regex":"1",
  "exclude":"1"
}
```

← Previous

→ Next

✕ Cancel

6. Click **Next**.

You are prompted to choose an action.

7. Choose one of the **Verify file integrity** actions depending on what you want the system to do when a mismatch is detected. The possible actions are:

- **Verify file integrity and generate admin alert on mismatch:** Detects the mismatch and adds an entry to the **Alerts** screen of the admin portal. However, the file is uploaded into FileCloud, and if it is determined that it should be deleted, this must be done as a separate action.
- **Verify file integrity and delete on mismatch:** Detects the mismatch, adds an entry to the **Alerts** screen of the admin portal, and deletes the file from FileCloud. An audit entry is added in the admin portal to indicate that the file has been deleted by the workflow.

## Create New Workflow



Select the action to perform when the condition is triggered

THEN Action ..

Notify file actions to user(s) ▼

Notify file actions to user(s)

Copy the file(s) to some location

Delete the file(s)

Move the file(s) to some location

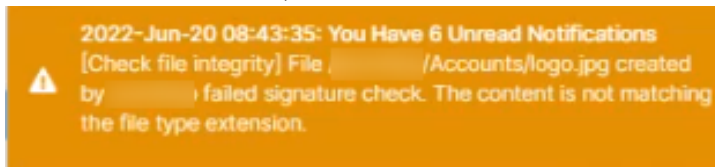
Verify file integrity and generate admin alert on mismatch

Verify file integrity and delete on mismatch

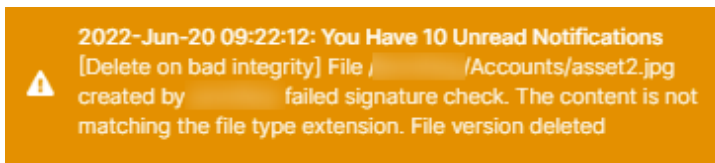
Execute a command

Run a report

In both cases, a pop-up in the user interface notifies the user that the content and file type extension do not match, either:



or



In both cases, alerts also appear in the **Manage Alerts** screen of the admin portal.

8. After you choose one of the actions, click **Next**.
9. Add the **ignore\_file\_size\_in\_mb** parameter. The purpose of this parameter is to prevent the system from slowing down by scanning the content of large files. In the following example, the parameter is set to **10**.

Create New Workflow ×

Provide the required parameters for the action to be executed

Required Parameters

```
{
  "ignore_file_size_in_mb": "10"
}
```

This action will attempt to identify file type based on its content and check if it matches its extension.

If the file type does not match, generate admin portal alert.

File sizes larger than the specified size will not be scanned.

**ignore\_file\_size\_in\_mb:** Do not scan files larger than this limit specified in MegaBytes

```
{
  "ignore_file_size_in_mb": "10"
}
```

[← Previous](#)[→ Next](#)[✕ Cancel](#)

10. Click **Next**.

11. Enter a name for the workflow.

Create New Workflow ×

Name for this action
















Workflow Name

[← Previous](#)[→ Finish](#)[✕ Cancel](#)

12. Click **Finish**.

The workflow appears in the list on the Manage Workflows screen.

 Manage Workflows

Workflow						<a href="#">+ Add Workflow</a>
Workflow Name	IF THIS	THEN THAT	Last Check	Last Action	Enabled	Actions
Check file integrity	If a file is created	Verify file integrity and generate admin alert on mismatch	Never	Never	<input checked="" type="checkbox"/>	    
Inactive Files	If file was not modified for specified days	Notify file actions to user(s)	April 25, 2022, 7:21 am	April 25, 2022, 6:50 am	<input type="checkbox"/>	    
Notify on file upload	If a file is added or updated	Notify file actions to user(s)	August 2, 2021, 1:40 pm	July 12, 2021, 1:43 pm	<input type="checkbox"/>	    

Since the workflow is enabled, now each time a file is uploaded for the first time into FileCloud, its content and file extension are checked for a mismatch.

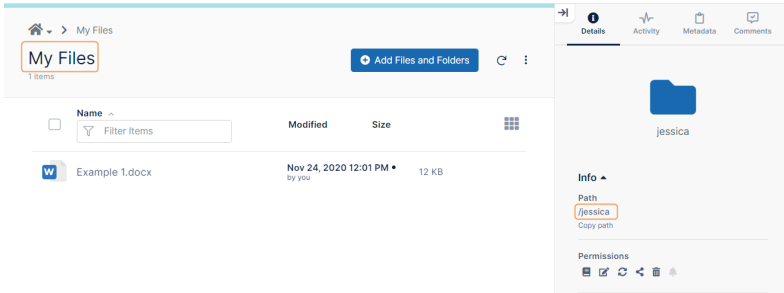
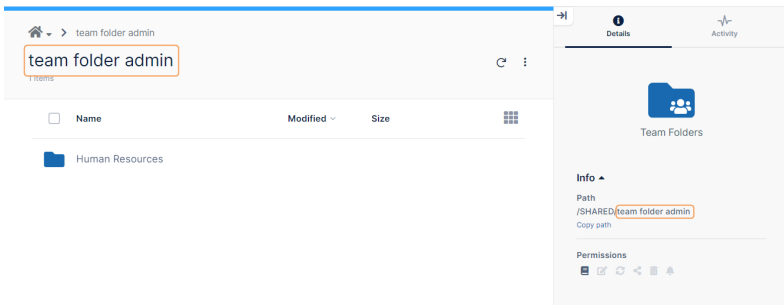


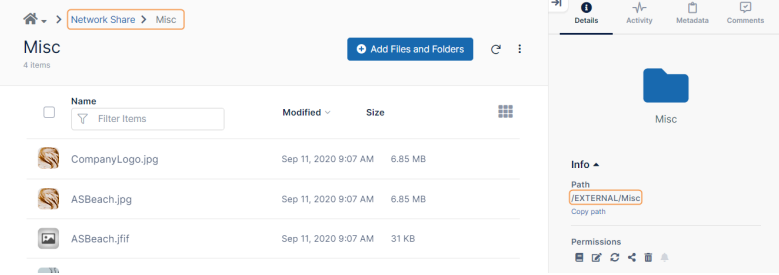
By default, plain text files must have the extension txt, dat, log or csv to pass the integrity check.

## Identifying a FileCloud Specific Path

For many operations and configurations, FileCloud requires that you specify the FileCloud system path name. For example, when you are configuring a [report](#) or a [workflow](#), if you want to specify a path, you must use the path's system name.

The following table lists the correct way to specify paths for files and folders in **My Files**, **Team Folders**, **Network Shares**, and **Shared with Me**.

Folder	How to specify path	Example
My Files	/username	<p>In this example, to specify the <b>My Files</b> folder of the user with username <b>jessica</b>, use:</p> <p><b>/jessica</b></p> <p>If <b>jessica</b> were logged in, and she selected <b>My Files</b>, she would see the exact path in the <b>Details</b> tab in the right panel.</p> 
Team Folders	/teamfolderaccount	<p>In this example, to specify the <b>Team Folders</b> folder use the name of the account that manages Team Folders:</p> <p><b>/team folder admin</b></p> <p>An end user who selected <b>Team Folders</b> could look in the <b>Details</b> tab in the right panel and copy the portion of the path after /SHARED</p> 

<p>Network Shares</p>	<p>/EXTERNAL/ foldername</p>	<p>In this example, to specify the <b>Network Shares</b> folder <b>Misc</b>, use: <b>/EXTERNAL/Misc</b></p> <p>An end user who selected <b>Network Shares/Misc</b> could look in the <b>Details</b> tab in the right panel and copy the exact path.</p>  <p>The screenshot shows the FileCloud interface. The breadcrumb path is 'Network Share &gt; Misc'. The main area displays a folder named 'Misc' containing three files: 'CompanyLogo.jpg' (6.85 MB), 'ASBeach.jpg' (6.85 MB), and 'ASBeach.jfif' (31 KB). The right-hand 'Details' panel is open, showing the folder icon and the path '/EXTERNAL/Misc' highlighted in red. Below the path, there is a 'Copy path' link. The 'Permissions' section is also visible at the bottom of the details panel.</p>
<p>Shared with Me</p>	<p>Can't be done. You must specify the path from the owner's My Files (use the owner's username)</p>	

## Custom Reports



The **folder\_path** parameter was added to the **Get downloaded files** report in FileCloud version 23.242.

FileCloud enables you to create custom reports and download them in an Excel format. To get started with the reporting system, go to the Reports menu item in the left navigation menu in admin interface. In order to view the reports, the admin user must be the master admin or must have access to the reports system. An admin user can be granted access to the reports system through the Admins menu item on the left navigation menu.

The reports screen displays the list of existing reports. The filter text box can be used to filter reports by name. The individual reports on the report list can be viewed, downloaded, edited and deleted. New reports can be added by clicking the Add Report button.

**Manage Reports**

Report  ALL + Add Report

Report Name	Query	Actions
dlp-2	Get statistics about DLP violations	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✖</a>
dlp	Get statistics about DLP violations	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✖</a>
OS Report	Get client applications grouped by OS	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✖</a>
get effective permission for team folders	Get the effective permissions for the team folders	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✖</a>
Metadata	Get files tagged with metadata report	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✖</a>
Creation Date	Get files tagged with metadata report	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✖</a>
Login report	Get user login report	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✖</a>
File activities	Get all file activities by users	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✖</a>
clients	Retrieve client application information	<a href="#">▶</a> <a href="#">📄</a> <a href="#">✖</a>

Page 1 of 1  
9 rows



Some reports, such as reports on file actions and failed logins, get their data from the audit log. These reports only include events that are in the audit logs when you run the report.

## Add Reports

Click the add report button and Select the report to create from the drop down list.

## Create New Report



Select the report from the list

Select Report to  
Create

Get user shares report



→ Next

✕ Cancel

The next step is to set the parameters. The parameters can be entered in the text box. The format for the parameters are given on the bottom of the screen. The screen also indicates whether the parameters are optional or required.


## Create New Report



Provide the required parameters for the report query in JSON format

Required Parameters

```
{  
  "keyword": "jaredt"  
}
```




Get report of all shares

**keyword** : (OPTIONAL) Keyword to search in sharename, sharelocation, shareowner, shorturlstring

**folderpath** : (OPTIONAL) Enter the path to list the shares from path

**permissions** : (OPTIONAL) If set to '1' a list of effective permissions for each user assigned to the share will be displayed

```
{  
  "keyword": "keywordstring",  
  "folderpath": "/pathname",  
  "permissions": "1"  
}
```



← Previous

→ Next

✕ Cancel

The final step is to set a report name. The same report can be created multiple times with different parameters and named differently. This enables you to execute and download the reports quickly.

## Download Reports

From the report list, run the report to view the report results in a separate window. First 30 rows are displayed on the screen. The download button can be used to download the data in csv format.

## Report Results



user quota report							Refresh	Download
2 rows.								
username	email	file_count	quota_usage_bytes	quota_usage_readable	quota_assigned	quota_usage_percent		
john baxter	[REDACTED]	186	106862964	101.91 MB	2 GB	4.98		
mary higgins	[REDACTED]	20	970335	948 KB	2 GB	0.05		

Close


## Available Reports

Report Name	Description
Retrieve client application information	Report of all remote client devices connected to FileCloud and their details. <b>Data Retrieved:</b> userid, client display name, client os type, client OS version, client api level, client last login <b>Parameters:</b> None
Get client application grouped by OS	Report of total client devices that are connected to FileCloud grouped by client OS. <b>Data Retrieved:</b> client OS type(Windows, Android etc), total devices connected. <b>Parameters:</b> None
Get client apps grouped by TYPE	Report of total client devices that are connected to FileCloud grouped by TYPE. <b>Data Retrieved:</b> Client Type(Sync, Drive etc), total devices connected. <b>Parameters:</b> None

Report Name	Description
Get all file activities by users	<p>Report of all add, update, share, download, and delete actions for files. If date parameters are not supplied, actions from last 7 days are retrieved.</p> <p><b>Data Retrieved:</b> Timestamp of action, username, file name, action.</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• user: (OPTIONAL) Enter the username to list the file activities of the user</li> <li>• from_date: (OPTIONAL) From date in Y-M-d H:i:s</li> <li>• to_date: (OPTIONAL) To date in Y-M-d H:i:s</li> </ul> <p>This report is available beginning in FileCloud 20.1.</p>
Get file type distribution in managed storage	<p>Report of File types stored in FileCloud along with the total count of each type</p> <p><b>Data Retrieved:</b> File Type, total files stored.</p> <p><b>Parameters:</b> None</p>
Get storage usage by file type	<p>Report of amount of storage space used by each file type.</p> <p><b>Data Retrieved:</b> File type, sizeraw (file size in bytes), size (formatted file size)</p> <p><b>Parameters:</b> None</p>
Get users who have most files in managed storage	<p>Report of users who have the most files stored under FileCloud in managed storage</p> <p><b>Data Retrieved:</b> username, total files stored.</p> <p><b>Parameters:</b> None</p>
Get user quota usage report	<p>Report of users who use the maximum quote in FileCloud managed storage</p> <p><b>Data Retrieved:</b> username, email, file count, quote usage, quote assigned, quote usage percentage.</p> <p>Beginning with FileCloud version 20.3, the CSV file that is downloaded also displays the groups the user belongs to, the user's effective policy, and the user's last log-in date and time.</p> <p><b>Parameters:</b> None</p>
Get number of active files in managed storage	<p>Report of total number of files that were changed in the last 1 day, 1 week, 1 month and 6 months</p> <p><b>Data Retrieved:</b> days, total files changed, percent of files changed.</p> <p><b>Parameters:</b> None</p>

Report Name	Description
Get uploaded files report	<p>Report on what files were uploaded during a given period, or files uploaded by a user or group of users during a particular period.</p> <p><b>Data Retrieved:</b> Timestamp of upload, user name, user agent, IP address, file path, bytes of file uploaded</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• <i>from_date</i> : (OPTIONAL) From date in Y-M-d H:i:s</li> <li>• <i>to_date</i> : (OPTIONAL) To date in Y-M-d H:i:s</li> <li>• <i>username</i> : (OPTIONAL) User account name - can be set only when <i>from_date</i> and <i>to_date</i> are specified</li> <li>• <i>ignore_from_owner</i>: (OPTIONAL) Define if the uploads made from folders owned by the user are ignored (YES or NO, defaults to NO)</li> </ul>
Get downloaded files report	<p>Report on what files were downloaded during a given period, or files downloaded by a user or group of users during a particular period.</p> <p><b>Data Retrieved:</b> Timestamp of download, user name, user agent, IP address, file path, bytes of file downloaded</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• <i>from_date</i> : (OPTIONAL) From date in Y-M-d H:i:s</li> <li>• <i>to_date</i> : (OPTIONAL) To date in Y-M-d H:i:s</li> <li>• <i>folder_path</i> : (OPTIONAL) Restrict report to files inside specified path.</li> <li>• <i>username</i> : (OPTIONAL) User account name - can be set only when <i>from_date</i> and <i>to_date</i> are specified</li> <li>• <i>ignore_from_owner</i>: (OPTIONAL) Define if the downloads made from folders owned by the user are ignored (YES or NO, defaults to NO)</li> </ul>
Get files tagged with metadata report	<p>Report listing files/folders and their value for a specified metadata field.</p> <p><b>Data Retrieved:</b> path of folder or file, username, metadata field, value of metadata field</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• <i>metadata_name</i> : (REQUIRED) Name of the metadata set</li> <li>• <i>attribute_name</i> : (REQUIRED) Name of the metadata attribute</li> <li>• <i>attribute_value</i>: (OPTIONAL) Metadata attribute value</li> </ul>
Get shares report	<p>Report listing shares created.</p> <p><b>Data Retrieved:</b> Timestamp of download, user name, user agent, IP address, file path, password</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• <i>from_date</i> : (OPTIONAL) From date in Y-M-d H:i:s</li> <li>• <i>to_date</i> : (OPTIONAL) To date in Y-M-d H:i:s</li> <li>• <i>username</i> : (OPTIONAL) User account name - can be set only when <i>from_date</i> and <i>to_date</i> are specified</li> </ul>

Report Name	Description
File query report	<p>Report listing files or folders filtered by specified parameters if included.</p> <p><b>Data Retrieved:</b> file or folder name, path, type (file or folder), size, last modification date, create date</p> <p>Note: Prior to FileCloud version 21.3, the year for the modification and create dates is returned in 2 digits (for example</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• <b>userid :</b> (OPTIONAL) User id to retrieve listing. If not supplied, all user listings are generated</li> <li>• <b>sort :</b> (OPTIONAL) Sort criteria can be "SIZE" or "MODDATE" or "CREATEDDATE"</li> <li>• <b>limit :</b> (OPTIONAL) the total number of results</li> <li>• <b>searchterm :</b> (OPTIONAL) Match keyword in file or folder name</li> <li>• <b>type :</b> (OPTIONAL) Type can be "file" or "folder", default is "file"</li> <li>• <b>path :</b> (OPTIONAL) Restrict report to files inside specified path. For help specifying the path correctly, see Identifying a FileCloud Specific Path.</li> </ul>
File count report	<p>Report of file count in paths specified in parameters.</p> <p><b>Data Retrieved:</b> number of files in each specified path.</p> <p><b>Parameters:</b> List of paths. For help specifying the path correctly, see Identifying a FileCloud Specific Path.</p> <p><b>Note:</b> This report does not include versions, deleted files and thumbnails; however, these files are considered in quota calculations in other reports, so file counts throughout reports may not be the same.</p>
Get deleted files report	<p>Report of deleted files.</p> <p><b>Data Retrieved:</b> Timestamp of delete, user name, user agent, IP address, file path</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• <b>from_date :</b> (OPTIONAL) From date in Y-M-d H:i:s</li> <li>• <b>to_date :</b> (OPTIONAL) To date in Y-M-d H:i:s</li> </ul>
Get bandwidth usage for this instance of FileCloud	<p>Report of the total bandwidth (upload and download) as tracked by this instance of the file cloud server.</p> <p><b>Data Retrieved:</b> upload bandwidth and download bandwidth</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• <b>from_date :</b> (OPTIONAL) From date in Y-M-d H:i:s</li> <li>• <b>to_date :</b> (OPTIONAL) To date in Y-M-d H:i:s</li> </ul>
Managed Storage File, Folder Count, and Size report	<p>Report of all folders and sub folders within a given path, showing each file count and total size of the folder</p> <p><b>Data Retrieved:</b> folder and sub folder path, file count and size</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• <b>path:</b> (REQUIRED) Location path. For help specifying the path correctly, see Identifying a FileCloud Specific Path.</li> </ul> <p>This report is available in FileCloud version 20.3 and later.</p>

Report Name	Description
Get all exported secure docs report	<p>Report of all files exported securely.</p> <p><b>Data Retrieved:</b> folder path, user performing the download, options enabled (screenshot/screenshare, secure view, or enable print), # times accessed, max access times, last access date</p> <p><b>Parameters:</b> None</p>
Get user shares report	<p>Report of all the shares created in FileCloud and their details.</p> <p><b>Data Retrieved:</b> share name, share owner, share URL, share type, share location, created on, last access, expiry date</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• keyword - search keyword in share name, share owner, share url string (string following /url/)</li> <li>• folderpath - location path. For help specifying the path correctly, see Identifying a FileCloud Specific Path.</li> </ul> <p>The CSV file that is downloaded contains additional information about users and groups that have access to each share.</p> <p>This update is available in FileCloud Server version 18.2 and later.</p>
Get the advanced share activity of users	<p>Report showing extensive details about the activity on a share. If no parameters are entered, the period reported is the last 7 days.</p> <p><b>Data Retrieved:</b> timestamp of action, action, action details (share permissions), folder name, path, affected user, affected user email address, author (person performing the action), author email address, change source IP, additional info (indicates if share is a folder), share URL</p> <div data-bbox="459 1205 1385 1460" style="border: 1px solid #0070C0; padding: 10px; margin: 10px 0;"> <p> For multiple entries of the same share, the Action Details column on the report shows the most recent share's permissions.</p> <p>If a user shares a folder and shares a file in that folder during the period reported on, the report displays separate entries for the folder and the file.</p> </div> <p><b>Parameters:</b></p> <p>from_date: (OPTIONAL) From date in Y-M-d H:i:s  to_date: (OPTIONAL) To date in Y-M-d H:i:s  owner: (OPTIONAL) Owner name</p> <p>This report is available beginning in FileCloud 20.1.</p>

Report Name	Description
Get files/folders shared with user	<p>Report listing the files and folders shared with a specific user</p> <p><b>Data Retrieved:</b> share name, share owner, share url, share location, type (private or public), expiry date, creation date</p> <p><b>Parameter:</b>email of share recipient</p> <p>This report is available beginning in FileCloud 21.1.</p>
Get effective permissions for team folders	<p>Report on the permission level of each user who has access to a team folder.</p> <p><b>Data Retrieved:</b> folder, type (private or public), share location, user, permission</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>paths: (OPTIONAL) List of the names of the team folders to include on the report. For help specifying the path correctly, see Identifying a FileCloud Specific Path.</li> <li>users : (OPTIONAL) List of users to be included in the report.</li> </ul>
Get anonymous/unauthorized login geolocation report	<p>Report of unauthenticated and anonymous users who accessed FileCloud showing users' IP addresses and location. To view location, <a href="#">Show Geo IP Chart</a> in <b>Settings &gt; Admin</b> must be set to <b>TRUE</b>.</p> <p><b>Data Retrieved:</b> IP address, operation, username, user agent, geo area, city, country, create date</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>from_date : (OPTIONAL) From date in Y-M-d H:i:s</li> <li>to_date : (OPTIONAL) To date in Y-M-d H:i:s</li> <li>group_by_ip : (OPTIONAL) Set to "1" to group result by IP address</li> </ul>
Get user login report	<p>Report of all logins to FileCloud and their details. If no parameters are entered, the period reported on is the last 7 days.</p> <p><b>Data Retrieved:</b> login time, username, useragent, IP</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>from_date: (OPTIONAL) login from date</li> <li>to_date: (OPTIONAL) login to date</li> <li>OR</li> <li>last_number_of_hours : (OPTIONAL) number of hours before the present time to begin retrieving login records.</li> </ul> <p>The last_number_of_hours parameter is available beginning in FileCloud 20.1. If from_date, to_date, and last_number_of_hours are entered together, last_number_of_hours is ignored.</p>
Get number of emails sent, grouped by sender	<p>Report of the number of emails sent in the last X hours</p> <p><b>Data Retrieved:</b> sender, number of emails sent</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>hours: number of hours ago to begin retrieving sent email records.</li> </ul>

Report Name	Description
Get statistics about DLP violations	<p>Report of DLP violations by rule.</p> <p><b>Data Retrieved:</b> user, time of violation, user action, rule violated</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• <b>rule_name</b> : (OPTIONAL) Name of the rule</li> <li>• <b>minutes</b> : (OPTIONAL) How many minutes ago to begin looking at violations</li> </ul> <p>The CSV file that is downloaded also displays the files subjected to the rule violation and, beginning in FileCloud 20.1, the metadata and attributes tagged to those files.</p>
Get a report of active users	<p>Report of active users in the last 15 minutes or for the time defined in minutes</p> <p><b>Data Retrieved:</b> user name</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• <b>minutes</b> : (OPTIONAL) How many minutes ago to consider users as active</li> </ul>
Get file movement statistics	<p>Report of last file uploads, downloads, and shares (or share changes)</p> <p><b>Data Retrieved:</b> number of files downloaded, number of files uploaded, number of files shared and share changes</p> <p><b>Parameters:</b> None</p>

## Specifying Y-M-d H:i:s values

Many of the report parameters require a date/time value in **Y-M-d H:i:s** format. The following table indicates the allowed values in this format.

Format	Description	Example/Possible values
Y	Year, in 4-digit format	2021
M	Month, in 2-digit format, with leading 0 if necessary	00 to 12
d	Day, in 2-digit format, with leading 0 if necessary	01 to 31
H	Hour, in 2-digit 24-hour format	00 to 23
i	Minute, in 2-digit format, with leading 0 if necessary	00 to 59
s	Second, in 2-digit format, with leading 0 if necessary	00 to 59

Including the **H:i:s** settings for time is not required.

# Manage Folder Level Permissions

Administrators can manage folder-level permissions assigned to folders. In order to view these folder-level permissions, the admin must be the main admin or an admin user with access to the folder permissions enabled. An admin user can be granted access to the Folder permissions system through the Admins menu item on the left navigation panel (see Managing Admin Users).

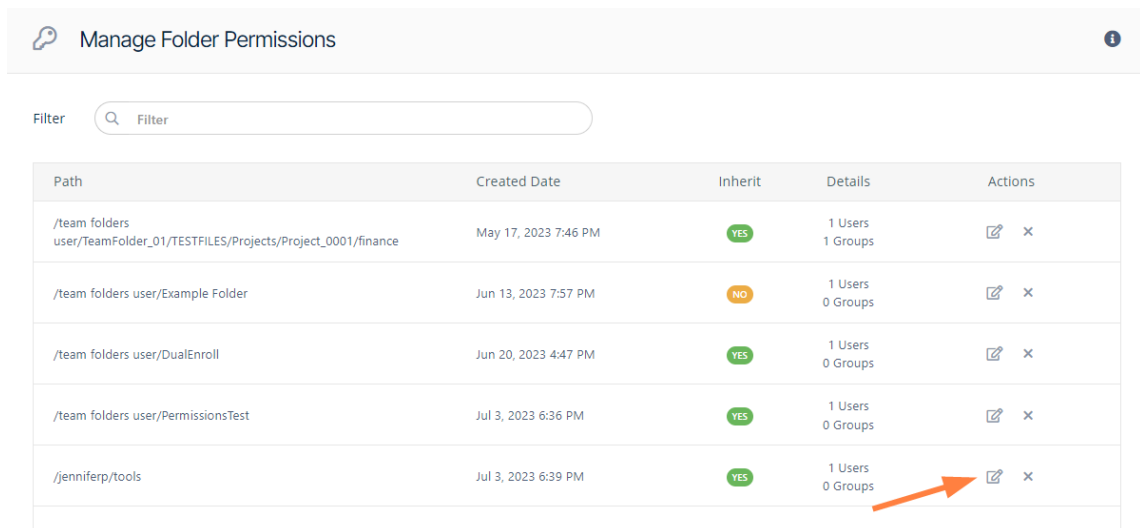
The screen displays the list of existing folder-level permissions set in the system. This includes folder-level permissions set on Team Folders in the admin portal and folder-level permissions set on user folders in the user portal.

Use the **Filter** box to filter folder permissions on the folder path. Individual permissions can then be viewed, edited and deleted.

For more information about folder-level permissions, see Folder-Level Permissions.

## To Edit Folder-Level Permissions

1. To open the **Manage Folder Permissions** screen, In the navigation panel, click **Folder Permissions**.



Path	Created Date	Inherit	Details	Actions
/team folders user/TeamFolder_01/TESTFILES/Projects/Project_0001/finance	May 17, 2023 7:46 PM	YES	1 Users 1 Groups	
/team folders user/Example Folder	Jun 13, 2023 7:57 PM	NO	1 Users 0 Groups	
/team folders user/DualEnroll	Jun 20, 2023 4:47 PM	YES	1 Users 0 Groups	
/team folders user/PermissionsTest	Jul 3, 2023 6:36 PM	YES	1 Users 0 Groups	
/jenniferp/tools	Jul 3, 2023 6:39 PM	YES	1 Users 0 Groups	

2. To open the **Manage Folder Level Security** dialog box, click the edit button.
3. Follow the steps below to assign and change user and group folder-level permissions. Users who do not appear on the list have all folder-level permissions to the folder (unless their group permissions are limited)

Folder: /jennifer/Admin hold

Security Check Access

Permissions

Inherit Parent Folder Security:  Inherit  Don't Inherit

User Group

Add User

User	Read	Write	Delete	Share	Manage
dm898002@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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Inherited Permissions

User	Read	Write	Delete	Share	Manage
jm2344311@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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Close

**A** By default, **Inherit** is selected. If you select **Don't Inherit**, users do not inherit permissions from this folder's parent folder, and the lower **Inherited Permissions** section no longer appears.

**B** Click **Add User** to add a user and limit their access to the folder, or click the **Group** tab and add a group.

**C** In the top list of users, check or uncheck levels of permissions.

# Managing Metadata

As an administrator, you can manage **metadata** to provide additional information about files and folders in FileCloud and to use the information when performing actions on them. FileCloud includes built-in metadata sets that include information such as image properties, file create dates, and metadata tags from other applications. FileCloud also allows you to build any number of custom metadata sets.

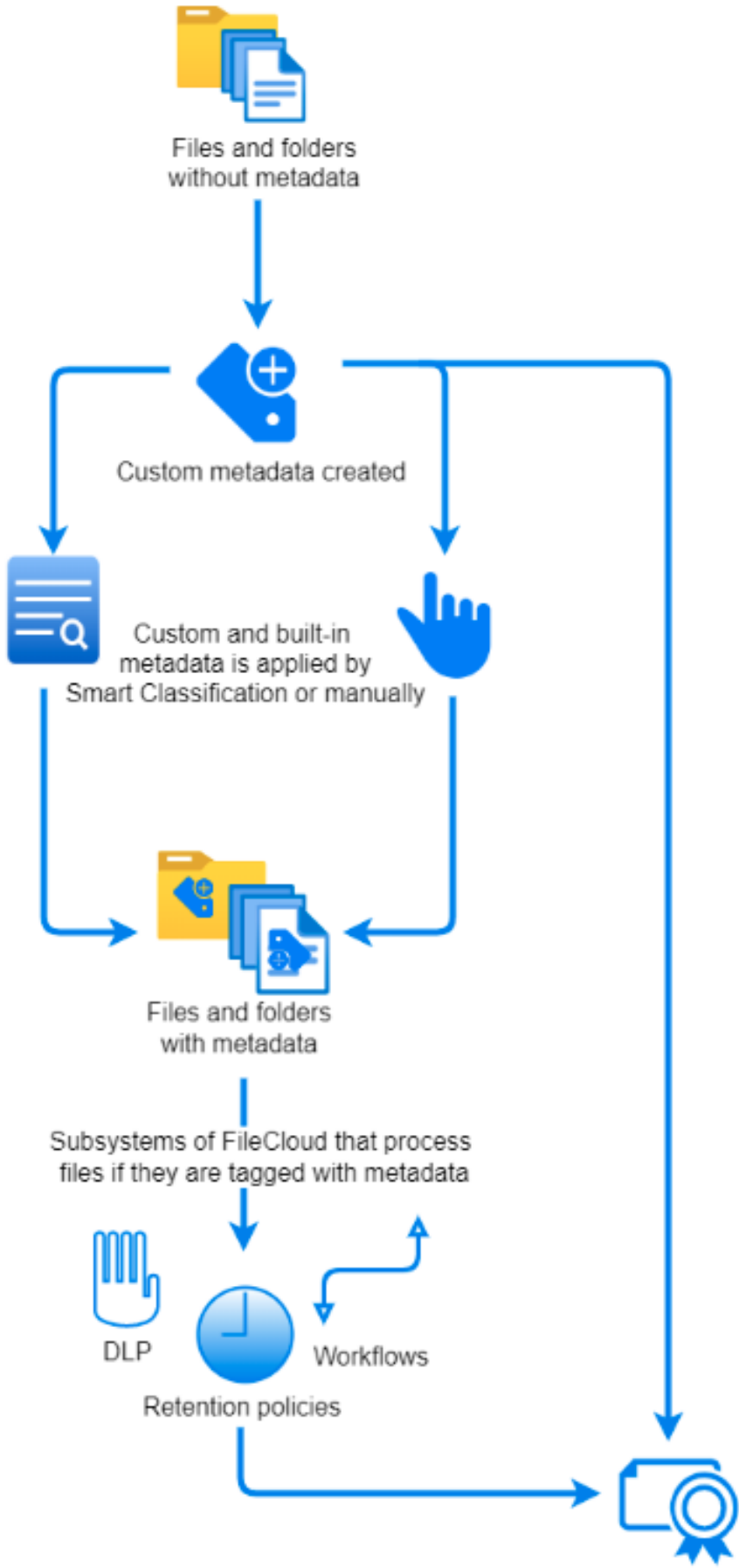
## Metadata for governance and other system processes

Metadata serves an important role in the functioning of many processes in FileCloud, including compliance, data leak prevention (DLP), retention policies, and workflows. You can configure these processes to look for files and folders with certain metadata values and then act on matching files and folders accordingly.

The following diagram shows you how metadata is applied and used in FileCloud. First, create your metadata, if necessary. FileCloud includes built-in metadata, but for some purposes, such as identifying confidential or secure information, you must create custom metadata. After your custom metadata is created, Smart Classification automatically applies the correct metadata to files and folders. In addition, users can apply metadata manually.

After files and folders are marked with metadata, the DLP, retention, and workflow sub-systems of FileCloud use metadata to identify content to act on. Some examples are described below the diagram.

Once the necessary metadata, DLP rules, and retention policies have been configured, compliance standards can be met.



Here are some examples of the way the different sub-systems in FileCloud can use metadata:

- **DLP:** If a file's **Confidential** metadata attribute is equal to **Yes**, DLP prevents it from being shared externally.
- **Retention policies:** If a file's **Sensitivity Label** attribute is equal to **general**, then a retention policy of 3 years is applied to it.
- **Workflows:** If a file's **Modified** attribute is equal to a date over 3 months ago, then a workflow sends an email to the email address in **Last Modified By**.

Here are some examples of the way compliance rules are met by metadata:

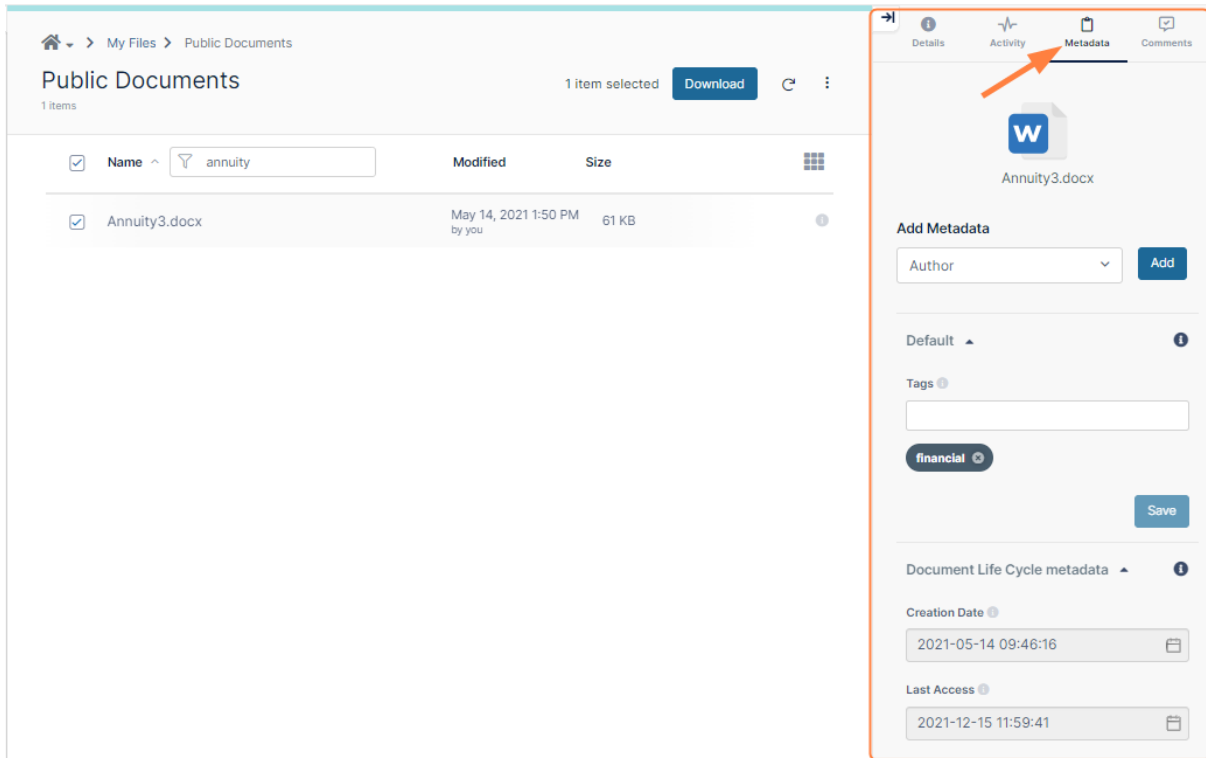
- The HIPAA section of the Compliance Center requires that your system include metadata that identifies PHI data.
- The ITAR section requires your system to use content classification to apply metadata tags to defense and technical articles, and then use DLP to block public sharing of the tagged articles.



**Example of the process:** In a medical facility's system, a new file is uploaded. Smart Classification searches its contents for the string **Medical Record Number**. It finds the string and applies the **PHI** metadata tag to the file. When an external user attempts to upload the file, a DLP rule identifies the **PHI** metadata tag, and therefore, does not allow the upload. In 2 weeks, a user attempts to delete the file, but a 6-year retention policy identifies the **PHI** metadata tag, and does not allow the file to be deleted.

## Metadata for users

Metadata is also useful to your users, who can view the information it provides about files and folders in the Metadata tab in the side panel of the user portal. In the Metadata tab, users can view the metadata applied to a file or folder, and depending on their permissions, can add and change metadata.



Users can also search on metadata and apply color tag metadata to files and folders for categorization and identification purposes.

In this section






## Metadata Components and Types

FileCloud defines two levels of metadata definition:

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

### See a Description of Metadata Terms

Figure 1. Metadata Terms

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

## Metadata Set Types

FileCloud supports the following types of Metadata Sets:

TYPE	DESCRIPTION	SETS AVAILABLE
Default	<p>This a special type of metadata set that is automatically associated with every single File Object when it is created, copied, uploaded, etc.</p> <ul style="list-style-type: none"> <li>• For already existing File Objects it will be associated when the file / folder is accessed for the first time.</li> <li>• Exactly one Default Set exists in FileCloud - it cannot be deleted, renamed or disabled, but administrators can customize attributes and permissions.</li> <li>• Out of the box it is shipped with a single predefined attribute of Array type - Tags.</li> </ul>	Defaults

TYPE	DESCRIPTION	SETS AVAILABLE										
<p>Built-In</p>	<p>These are metadata sets that have been created for you.</p> <ul style="list-style-type: none"> <li>Administrators can edit the attributes</li> <li>Administrators can choose to disable the use of this metadata</li> </ul> <p>The versions of FileCloud in which each built-in metadata set and its attributes became available are listed in the following table:</p> <table border="1" data-bbox="938 954 1169 1901"> <thead> <tr> <th data-bbox="938 954 1107 1335">Built-in Metadata Set</th> <th data-bbox="1107 954 1169 1335">File Cloud Version</th> </tr> </thead> <tbody> <tr> <td data-bbox="938 1335 1107 1476">Image</td> <td data-bbox="1107 1335 1169 1476">18.1</td> </tr> <tr> <td data-bbox="938 1476 1107 1617">Document Life Cycles</td> <td data-bbox="1107 1476 1169 1617">18.1</td> </tr> <tr> <td data-bbox="938 1617 1107 1758">Microsoft Office Tag</td> <td data-bbox="1107 1617 1169 1758">20.1</td> </tr> <tr> <td data-bbox="938 1758 1107 1901">Color Tagging</td> <td data-bbox="1107 1758 1169 1901">20.3</td> </tr> </tbody> </table>	Built-in Metadata Set	File Cloud Version	Image	18.1	Document Life Cycles	18.1	Microsoft Office Tag	20.1	Color Tagging	20.3	<ul style="list-style-type: none"> <li>Image metadata</li> <li>Document Life Cycle metadata</li> <li>Microsoft Office Tag metadata</li> <li>Color Tag metadata</li> <li>PDF Tag metadata</li> <li>AIP Sensitivity Label metadata</li> <li>Everfox CDR metadata</li> <li>Signority eSignature metadata</li> <li>ITAR metadata</li> <li>CUI metadata</li> </ul>
Built-in Metadata Set	File Cloud Version											
Image	18.1											
Document Life Cycles	18.1											
Microsoft Office Tag	20.1											
Color Tagging	20.3											

TYPE	DESCRIPTION	SETS AVAILABLE														
	<table border="1"> <tr> <td data-bbox="922 344 1107 741"><b>Built-in Metadata Set</b></td> <td data-bbox="1107 344 1187 741"><b>FileCloud Version</b></td> </tr> <tr> <td data-bbox="922 741 1107 882">PDF Tag</td> <td data-bbox="1107 741 1187 882">2 1. 2</td> </tr> <tr> <td data-bbox="922 882 1107 1023">AIP Sensitivity Label</td> <td data-bbox="1107 882 1187 1023">2 1. 2</td> </tr> <tr> <td data-bbox="922 1023 1107 1254">CDR</td> <td data-bbox="1107 1023 1187 1254">2 3. 2 4 1. 4</td> </tr> <tr> <td data-bbox="922 1254 1107 1485">Signority eSignature</td> <td data-bbox="1107 1254 1187 1485">2 3. 2 4 1. 4</td> </tr> <tr> <td data-bbox="922 1485 1107 1680">ITAR</td> <td data-bbox="1107 1485 1187 1680">2 3. 2 5 2</td> </tr> <tr> <td data-bbox="922 1680 1107 1930">CUI</td> <td data-bbox="1107 1680 1187 1930">2 3. 2 5 2</td> </tr> </table>	<b>Built-in Metadata Set</b>	<b>FileCloud Version</b>	PDF Tag	2 1. 2	AIP Sensitivity Label	2 1. 2	CDR	2 3. 2 4 1. 4	Signority eSignature	2 3. 2 4 1. 4	ITAR	2 3. 2 5 2	CUI	2 3. 2 5 2	
<b>Built-in Metadata Set</b>	<b>FileCloud Version</b>															
PDF Tag	2 1. 2															
AIP Sensitivity Label	2 1. 2															
CDR	2 3. 2 4 1. 4															
Signority eSignature	2 3. 2 4 1. 4															
ITAR	2 3. 2 5 2															
CUI	2 3. 2 5 2															

TYPE	DESCRIPTION	SETS AVAILABLE
<a href="#">Custom Metatdata Set</a>	This is a fully customizable set of metadata, defined by the administrator.	As many as you want to create

### How do I allow users to tag their files?

You must specify which users can access the Metadata attributes. If you do not add them, then the user will not be able to add a tag to their file.

➔ [Manage Metadata Permissions](#)

### More Information:

FileCloud Blogs
<ul style="list-style-type: none"> <li><a href="#">How to Best Utilize FileCloud's Metadata</a></li> </ul>

## Create a New Metadata Set

### Add a new metadata set definition

To add new metadata:

1. In the navigation panel, click **Metadata**.

The screenshot shows the 'Manage Metadata Sets' page in FileCloud. The left sidebar has 'Metadata' highlighted. The main area contains a table with the following data:

Metadata Set Name	Description	Status	Set Type	User Count	Group Count	Actions
Default	Default metadata set definition will be automatically bound to every single File and Folder.	Enabled	Default	0	0	ⓘ ✕
Image metadata	Image metadata (EXIF)	Enabled	Built-in	0	1	ⓘ ✕
Document Life Cycle metadata	Stores information regarding document life cycle	Enabled	Built-in	0	0	ⓘ ✕
Microsoft Office Tag metadata	Microsoft Office Tag metadata (MSOT)	Enabled	Built-in	0	1	ⓘ ✕
PDF Tag metadata	PDF Tag metadata set	Enabled	Built-in	0	1	ⓘ ✕
AIP Sensitivity Label metadata	AIP Sensitivity Label metadata set	Enabled	Built-in	0	1	ⓘ ✕
CDR	Content Disarm and Reconstruction	Enabled	Built-in	0	1	ⓘ ✕
Signority eSignature	Signority eSignature metadata	Enabled	Built-in	0	1	ⓘ ✕
Color Tagging metadata	Color Tagging metadata set	Enabled	Built-in	0	1	ⓘ ✕
ITAR Metadata	International Traffic in Arms Regulations metadata set	Enabled	Built-in	0	1	ⓘ ✕

2. To open the **Add Metadata Set Definition** dialog box, click **Add Metadata Set**.

**Add Metadata Set Definition**
✕

Metadata Set 📄

Name\*

Description\*

Disabled

Permissions

Users **Groups** Paths

Add Group

Name	Read Permission	Write Permission
Human Resources	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Page 1 of 1

Attributes

+ Add Attribute


Name	Attribute Type	Description	Status	Actions
Title	Text	User's job title	Enabled	<span>✎</span> <span>📄</span> <span>✕</span>
Type	Text	Full time or part time job	Enabled	<span>✎</span> <span>📄</span> <span>✕</span>

Create
Close

3. Enter **Name** and **Description** and check **Disabled** if you don't want the metadata set to be enabled when you save. it.
4. Add users or groups and specify permissions for them. Define FileCloud paths (locations) that have access to the metadata set. For more details, see [Managing Metadata Permissions](#).
5. Click **Add Attribute** and add at least one metadata attribute definition. For more details, see [Managing Metadata Attributes](#).
6. Click **Create**.

**Note:** If you need the metadata set id, click the copy icon in the **Metadata Set** box. If you need a metadata attribute id, click the copy icon in the row for the attribute:

**Edit Metadata Set Definition**

**Metadata Set** 

Name\*  
HR Metadata

Description\*  
Human Resources metadata

Disabled

**Permissions**

Users Groups Paths







Add User

Name	Read Permission	Write Permission
jennifer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
jessica	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Page 1 of 1

**Attributes**

Add Attribute

Name	Attribute Type	Description	Status	Actions
Title	Text	User's job title	Enabled	  
Type	Text	Full time or part time job	Enabled	  

Save Close

## Edit an Existing Metadata Set

### Propagating changes


Once changes to the metadata set definition are saved the background process runs, which propagates changes made to the set definition to metadata\_values collection that stores user provided attribute values. This is done to keep both collections in-sync and to increase performance for end-user metadata actions. Metadata info properties (name, description, status) are updated, permissions are omitted as they're not used in the metadata\_values collection and the main task is to keep attributes in sync. There are three main use cases that are served by the task:











1. **New attribute is added** - attribute definition is added to each associated metadata\_values document. Default value provided for this attribute is used.
2. **Existing attribute is changed** - attribute definitions is updated for each associated metadata\_values document. **Existing values remain untouched** even when default value was updated (the new value will be used for newly associated file objects but not for existing records).
3. **Attribute was deleted** - attribute definition is removed for all associated file objects. **Values are removed** accordingly. This operation cannot be reverted so all values for this attribute **will be lost**.

### Notes:

- The Default Metadata set is a special type and cannot be renamed.
- When an existing attribute is removed **all** associated values will be removed. This operation cannot be reverted.

### To edit an existing metadata set:

1. Open a browser and log in to the admin portal.
2. From the left navigation pane, under **Misc.**, click **Metadata**.
3. In the row of the set you want to edit, under **Actions**, click the edit button (  ).

Metadata Set Name	Description	Status	Set Type	User Count	Group Count	Actions
PDF Tag metadata	PDF Tag metadata set	Enabled	Native	0	1	 
Microsoft Office Tag metadata	Microsoft Office Tag metadata (MSOT)	Enabled	Native	0	1	 
Image metadata	Image metadata (EXIF)	Enabled	Native	0	1	 
HR Metadata	Human Resources metadata	Enabled	Custom	0	2	 
Document Life Cycle metadata	Stores information regarding document life cycle	Enabled	Native	0	0	 

The **Edit Metadata Set** dialog box opens.

**Edit Metadata Set Definition**
✕

Metadata Set
📄

Name\*

Description\*

Disabled

Permissions

Users

Groups

Paths

Add User

Name	Read Permission	Write Permission
jennifer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
jessica	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

⏪ Page  of 1 ⏩

Attributes

+ Add Attribute

Name	Attribute Type	Description	Status	Actions
Title	Text	User's job title	Enabled	✎ 📄 ✕
Type	Text	Full time or part time job	Enabled	✎ 📄 ✕

Save
Close

4. Edit properties, [permissions](#) and [attributes](#).

5. Click **Save**.

## Managing Metadata Attributes

Administrators can manage metadata tags in FileCloud.

### Attribute Types

Each attribute can have one of the following types:

Attribute type	Accepted values	UI editor type	Values validation
<b>Text</b>	Regular text value	TextBox	-
<b>Integer</b>	Integer numbers	TextBox	Type validation
<b>Decimal</b>	Decimal numbers	TextBox	Type validation
<b>Boolean</b>	True / False value	CheckBox	-
<b>Date</b>	Date value	Date picker	-
<b>Enumeration</b>	One value from a list of predefined values	Drop down / Select	-
<b>Array (Tag)</b>	A number of custom values provided by user	Tag Input - custom editor	-

⚠ Attribute type cannot change once the definition is saved.

### How do I add or delete attributes?

You can use the following ways to manage attributes:

- Edit Metadata Set Definition window
  - A new attribute can be added by clicking the "Add Attribute" button in the Attributes section of the Metadata definition widget.
  - Existing attributes can be edited by clicking the "Edit Attribute Definition" icon.
  - Existing attributes can be removed by clicking the "Delete Attribute Definition" icon.
- Tag Input Editor
- Tag input is a custom editor that allows users to provide multiple values for a single attribute with a better experience.

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

See a video on [Managing Attributes](#).

⚠ All attribute definition changes take effect when the whole set definition is saved.

## Video of Managing Metadata Attributes



After creating the metadata set, you can add, edit and delete its attributes.



## Managing Metadata Permissions

Administrators can use FileCloud Server to set the following Metadata types of permissions:

- User/group permissions (read/write) - these grant access to specific users and
- Allowed paths support - which affects File Objects based on their location.

### What are effective permissions?

When setting Metadata permissions, you need to consider additional permissions on the File Object such as:

- lock permissions,
- share permissions,
- network folder permissions,

Effective permissions include all of these considerations. For example, on a shared file, if a user has write permission to the metadata set but read-only access to share then the effective metadata permission would be read-only.

Table 1. Permissions Examples

User permissions	Group permissions	Allowed Paths	File Object	Additional permissions	Read/Write	Comment
Write	Readonly	All	/USERNAME/assets	-	y/y	Write permission is granted based on the user permissions
Write	-	All	/USERNAME/assets/image1.png	write lock	y/n	As lock is applied, readonly access to metadata will only be granted
Readonly	Write	All	/SHARED/user1/assets	view only access for share	y/n	Share permissions will narrow metadata permissions to readonly
Readonly	Write	/USERNAME/assets	/USERNAME/assets/images	-	y/y	As file path is a subpath of one of the allowed paths user will be granted write access for metadata
Write	-	/USERNAME/assets	/USERNAME/images	-	n/n	The path isn't allowed so no metadata permissions are granted at all

### How do I grant users permission to access Metadata?

The process of adding group permissions is similar to adding user permissions. The main difference is that when you use the *Add Group* button, all available groups are listed immediately. The rest of the process is exactly the same.

To grant a user access to the Metadata field:

1. Log in to the Admin Portal.
2. In the *Home* navigation panel on the left side, under *Misc.*, select *Metadata*.
3. In the *Manage Metadata Sets* section, select the one you want to grant access, and then click on the edit icon.
4. In the *Edit Metadata Set Definition* window, in *Permissions*, select the *Users* tab, and then click *Add User*.
5. In the *Search Users* window, in *Account or Email*, type in the user's information, and then click *Search*.
6. Select a user, and then you are returned to the *Edit Metadata Set Definition* window.
7. By default, the user is granted both *Read* and *Write* permissions.
8. Select the *Read* checkbox to grant or deny the user Read permissions.
9. Select the *Write* checkbox to grant or deny the user Read permissions.
10. At the bottom of the *Edit Metadata Set Definition* window, click *Save*.

⚠ It is very important to remember that all changes made to permissions are not saved until "Save" button is clicked and the validation is successful.

Watch a video on [granting users permission to access Metadata](#).

### How do I allow paths on which the metadata sets can be added?



All paths have to have one of the following formats:

- /USERNAME/...
- /EXTERNAL/...

Administrators can choose to allow all paths or specific paths on which the metadata sets can be added.

- By default all paths are allowed.
- When an administrator wants to provide a specific set of allowed paths:
  - the "Allow Selected Paths" option has to be selected and
  - all allowed paths have to be specified via the Add Allowed Path dialog.
- When the path is added it will be displayed on the list.
- A path can be removed from the list by clicking on the "Remove Allowed Path" icon.

**i** When path is allowed all sub-paths are automatically allowed as well. For example, when path: / USERNAME/assets is allowed than automatically the sub-paths /USERNAME/assets/images, / USERNAME/assets/videos/HD, etc are allowed.

Watch a video on [creating allowed paths](#).

## Video of Allowing Paths for Metadata Permissions

Administrators can use FileCloud Server to set the paths that metadata applies to. The metadata can only be applied to files and folders located on that path.

**Add Metadata Set Definition**

**Metadata Set**

Name\*  
Assets

Description\*  
Metadata set with media campaign information

Disabled

**Permissions**

Users Groups Paths

Add User

Name	Read Permission	Write Permission

**Attributes**

+ Add Attribute

Name	Attribute Type	Description	Status	Actions
Type	Text	type of asset	Enabled	
Owner	Text	User who created asset	Enabled	

## Video of Granting a User Metadata Permissions

When you add a user to a metadata set, you can choose whether the user has write permission. If you remove read permission, the user is removed from the list.

Working with

## Built-In Metadata

Built-in is a special type of metadata set that is automatically created for you.

Manage Metadata Sets + Add Metadata Set

Filter  Show 10 items

Metadata Set Name	Description	Status	Set Type	User Count	Group Count	Actions
Default	Default metadata set definition will be automatically bound to every single File and Folder.	Enabled	Default	0	0	
Image metadata	Image metadata (EXIF)	Enabled	Built-in	0	1	
Document Life Cycle metadata	Stores information regarding document life cycle	Enabled	Built-in	0	0	
Microsoft Office Tag metadata	Microsoft Office Tag metadata (MSOT)	Enabled	Built-in	0	1	
PDF Tag metadata	PDF Tag metadata set	Enabled	Built-in	0	1	
AIP Sensitivity Label metadata	AIP Sensitivity Label metadata set	Enabled	Built-in	0	1	
CDR	Content Disarm and Reconstruction	Enabled	Built-in	0	1	
Signority eSignature	Signority eSignature metadata	Enabled	Built-in	0	1	
Color Tagging metadata	Color Tagging metadata set	Enabled	Built-in	0	1	
ITAR Metadata	International Traffic in Arms Regulations metadata set	Enabled	Built-in	0	1	

Page 1 of 2

Filter  Show 10 items

Metadata Set Name	Description	Status	Set Type	User Count	Group Count	Actions
CUI Metadata	Controlled Unclassified Information metadata set	Enabled	Built-in	0	1	

Page 2 of 2

Unlike the **Default** metadata set:

- Built-In sets cannot be renamed
- Built-In sets are not limited to paths

The versions of FileCloud in which each built-in metadata set and its attributes became available are listed in the following table:

Built-in Metadata Set	FileCloud Version
Image	18.1
Document Life Cycles	18.1
Microsoft Office Tag	20.1
Color Tagging	20.3
PDF Tag	21.2
AIP Sensitivity Label	21.2
CDR	23.241.4
Signority eSignature	23.241.4
ITAR	23.252
CUI	23.252



The **Color Tagging** metadata set differs from the other built-in metadata sets because its Tag attribute can be edited (but not deleted).  
The attributes of all other built-in metadata sets cannot be edited or deleted.

The sets that have been created for you include:

### Image Metadata

The **Image** metadata set is based on the Exchangeable Image File Format (Exif) and is a standard that records the important data on image files such as shutter speed, aperture, ISO Speed, lens type etc.

- The Exif data provides valuable information to organize photographs, perform searches and provide vital information to photos stored in FileCloud.
- This set is provided to you so that you can allow users to store and search image attributes using metadata.
- FileCloud does not apply Image metadata for Azure/S3 Network Folders.

**Edit Metadata Set Definition**

Metadata Set 📄

Name\*

Description\*

Disabled

Permissions

Users   Groups   Paths

Add User

Name	Read Permission
emma	<input checked="" type="checkbox"/>

Page 1 of 1

Attributes

+ Add Attribute

Name	Attribute Type	Description	Status	Actions
Width	Integer	Image Width in Pixels	Enabled	✎ 📄 ✕
Height	Integer	Image Height in Pixels	Enabled	✎ 📄 ✕
Image Orientation	Enumeration	Image orientation	Enabled	✎ 📄 ✕
Image Orientation - Numeric	Integer	Image orientation as a number (8 different orientations)	Enabled	✎ 📄 ✕
Image XResolution	Text	Image Resolution in width direction	Enabled	✎ 📄 ✕

The following attributes exist in the **Image** built-in metadata set:

	Description	Options
Name	Title for the metadata set: <code>Image metadata</code>	<ul style="list-style-type: none"> <li>• Required</li> <li>• This cannot be changed</li> </ul>

	Description	Options
Description	By default, says: <a href="#">Image metadata (Exif)</a>	<ul style="list-style-type: none"> <li>• Required</li> <li>• This cannot be changed</li> </ul>
Disabled	Stops the metadata set from being automatically bound to every new file and folder.	<ul style="list-style-type: none"> <li>• Not selected</li> <li>• This cannot be changed</li> </ul>
User Permissions	Grant access to specific users to: <ul style="list-style-type: none"> <li>• Read: this permission displays the metadata to the user in the User Portal</li> </ul> For more information, read <a href="#">Managing Metadata Permissions</a>	<ul style="list-style-type: none"> <li>• Not Required</li> <li>• Read</li> </ul>
Group Permissions	Grant access to specific groups to: <ul style="list-style-type: none"> <li>• Read: this permission displays the metadata to the user in the User Portal</li> </ul> For more information, read <a href="#">Managing Metadata Permissions</a>	<ul style="list-style-type: none"> <li>• Not Required</li> <li>• Read</li> </ul>
Path Permissions	File Objects in this location will have the metadata set applied	<ul style="list-style-type: none"> <li>• Not available</li> <li>• This cannot be changed</li> </ul>
Attributes	A number of tags that are built-in for image files	<ul style="list-style-type: none"> <li>• Width: Image width in pixels</li> <li>• Height: Image Height in pixels</li> <li>• Image Orientation</li> <li>• Image Orientation - Numeric: orientation as a number</li> <li>• Image XResolution: width direction</li> <li>• Image YResolution: height direction</li> <li>• Unit of Resolution</li> </ul>

### Document Life Cycle Metadata

This set stores information about a document's life cycle.

**Edit Metadata Set Definition**
✕

Metadata Set 📄

Name\*

Description\*

Disabled

Permissions

Users
Groups
Paths

Add User

Name	Read Permission
emma	<input checked="" type="checkbox"/>

⏪ Page  of 1 ⏩

Attributes

+ Add Attribute

Name	Attribute Type	Description	Status	Actions
Creation Date	Date	File/Folder creation date	Enabled	✎ 📄 ✕
Last Access	Date	Last access date	Enabled	✎ 📄 ✕
Last Modification	Date	Last modification date	Enabled	✎ 📄 ✕
Check Sum	Text	File SHA256 fingerprint	Enabled	✎ 📄 ✕

The following attributes are included in the **Document Lifecycle** metadata set:

	Description	Options
Name	Title for the metadata set: Document Life Cycle Metadata	<ul style="list-style-type: none"> <li>Required</li> <li>This cannot be changed</li> </ul>
Description	By default, says: Stores information regarding document life cycle	<ul style="list-style-type: none"> <li>Required</li> <li>This cannot be changed</li> </ul>
Disabled	Stops the metadata set from being automatically bound to every new file and folder.	<ul style="list-style-type: none"> <li>Not selected</li> <li>This cannot be changed</li> </ul>

	Description	Options
User Permissions	<p>Grant access to specific users to:</p> <ul style="list-style-type: none"> <li>Read: this permission displays the metadata to the user in the User Portal</li> </ul> <p>For more information, read <a href="#">Managing Metadata Permissions</a></p>	<ul style="list-style-type: none"> <li>Not Required</li> <li>Read</li> </ul>
Group Permissions	<p>Grant access to specific groups to:</p> <ul style="list-style-type: none"> <li>Read: this permission displays the metadata to the user in the User Portal</li> </ul> <p>For more information, read <a href="#">Managing Metadata Permissions</a></p>	<ul style="list-style-type: none"> <li>Not Required</li> <li>Read</li> </ul>
Path Permissions	File Objects in this location will have the metadata set applied	<ul style="list-style-type: none"> <li>Not available</li> <li>This cannot be changed</li> </ul>
Attributes	<p>A number of custom values (tags) extracted from the file. One of these attributes is a SHA256 Fingerprint (file checksum).</p> <ul style="list-style-type: none"> <li>This is a unique text string generated by the SHA-1 hash algorithm.</li> <li>It is a standard for the implementation of a secure hash algorithm.</li> <li>It is a one-way cryptographic function that can be used to act as a 'signature' of a sequence of bytes.</li> <li>It is very unlikely that 2 different byte sequences would produce the same value (though not impossible)</li> </ul>	<ul style="list-style-type: none"> <li>Creation Date</li> <li>Last Access</li> <li>Last Modification</li> <li>Check Sum: File SHA256 Fingerprint</li> </ul>

### Microsoft Office Tag metadata

**Microsoft Office Tag** metadata enables the system to apply FileCloud tags that match existing tags in MS Office documents (.docx, .xlsx and .pptx files) when they were uploaded to FileCloud.

**Note:** FileCloud does not apply **Microsoft Office Tag** metadata for Azure/S3 Network Folders.

**Edit Metadata Set Definition**
✕

**Metadata Set**

Name\*

Description\*

Disabled

**Permissions**

Users   Groups   Paths

**Add User**

Name	Read Permission
emma	<input checked="" type="checkbox"/>

⏪ Page  of 1 ⏩

**Attributes**

**+ Add Attribute**

Name	Attribute Type	Description	Status	Actions
Title	Text	A name given to the resource	Enabled	✎ 📄 ✕
Subject	Text	The topic of the resource	Enabled	✎ 📄 ✕
Creator	Text	A person, company, or other entity responsible for making the resource	Enabled	✎ 📄 ✕
Keywords	Array	Important words or phrases related to the resource	Enabled	✎ 📄 ✕

The following attributes are included in FileCloud's **Microsoft Office Tag** metadata set:

	Description	Options
Title	Name of file.	<ul style="list-style-type: none"> <li>• Not required</li> <li>• Read (can only be changed in Microsoft Office file before uploading)</li> </ul>
Subject	Topic of file.	<ul style="list-style-type: none"> <li>• Not required</li> <li>• Read (can only be changed in Microsoft Office file before uploading)</li> </ul>
Creator	User who created file.	<ul style="list-style-type: none"> <li>• Not required</li> <li>• Read (can only be changed in Microsoft Office file before uploading)</li> </ul>

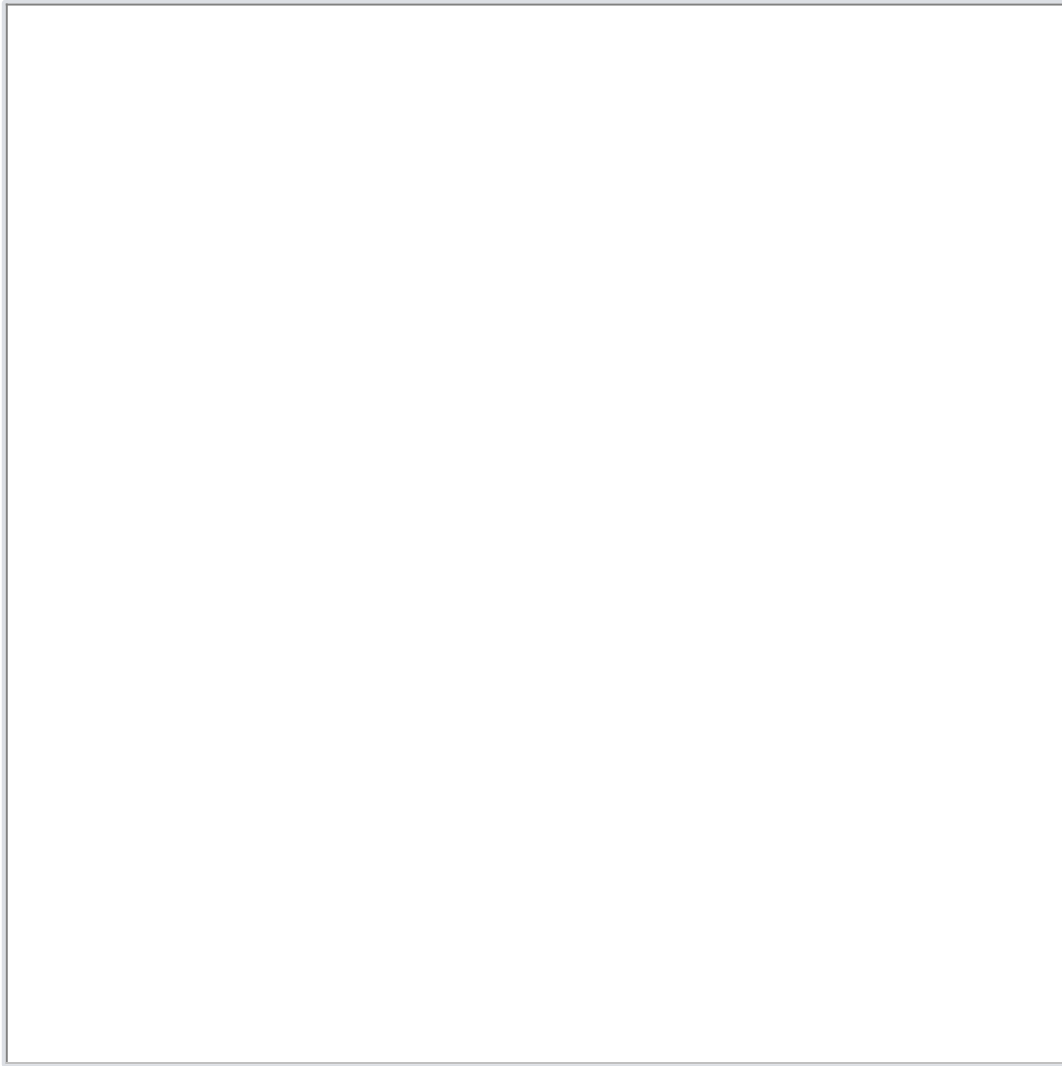
	Description	Options
Keywords	Keyword tags assigned to file.	<ul style="list-style-type: none"> <li>• Not required</li> <li>• Read (can only be changed in Microsoft Office file before uploading)</li> </ul>
Description	Description of file.	<ul style="list-style-type: none"> <li>• Not required</li> <li>• Read (can only be changed in Microsoft Office file before uploading)</li> </ul>
Last Modified By	Last user who modified file.	<ul style="list-style-type: none"> <li>• Not required</li> <li>• Read (can only be changed in Microsoft Office file before uploading)</li> </ul>
Created	Date file was created.	<ul style="list-style-type: none"> <li>• Not required</li> <li>• Read (can only be changed in Microsoft Office file before uploading)</li> </ul>
Modified	Date file was last modified.	<ul style="list-style-type: none"> <li>• Not required</li> <li>• Read (can only be changed in Microsoft Office file before uploading)</li> </ul>
Category	Category of file.	<ul style="list-style-type: none"> <li>• Not required</li> <li>• Read (can only be changed in Microsoft Office file before uploading)</li> </ul>
Sensitivity Labels	Sensitivity level of data in file, such as <b>Public</b> or <b>Confidential</b> .	<ul style="list-style-type: none"> <li>• Not required</li> <li>• Read (can only be changed in Microsoft Office file before uploading)</li> </ul> <p><b>Note: You can only view and capture sensitivity labels if you have enabled them in Office. They are disabled by default. Please see the following note regarding them.</b></p>



### MSOT Sensitivity Labels

By default, FileCloud does not capture MSOT sensitivity label data even if sensitivity labels are enabled in Office.

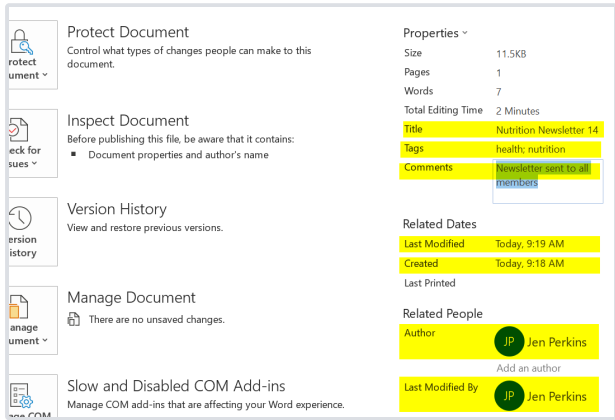
Prior to FileCloud 21.2, enabling the Sensitivity Label field was the only way to extract sensitivity label data. In FileCloud 21.2, AIP Sensitivity Label metadata, which captures more details and applies to more file types was added to replace this method; however, the MSOT sensitivity label is still available for backwards compatibility.



To enable FileCloud to capture MSOT sensitivity label data and to display the **Sensitivity Label** field in the **Metadata** panel, please contact FileCloud Support.

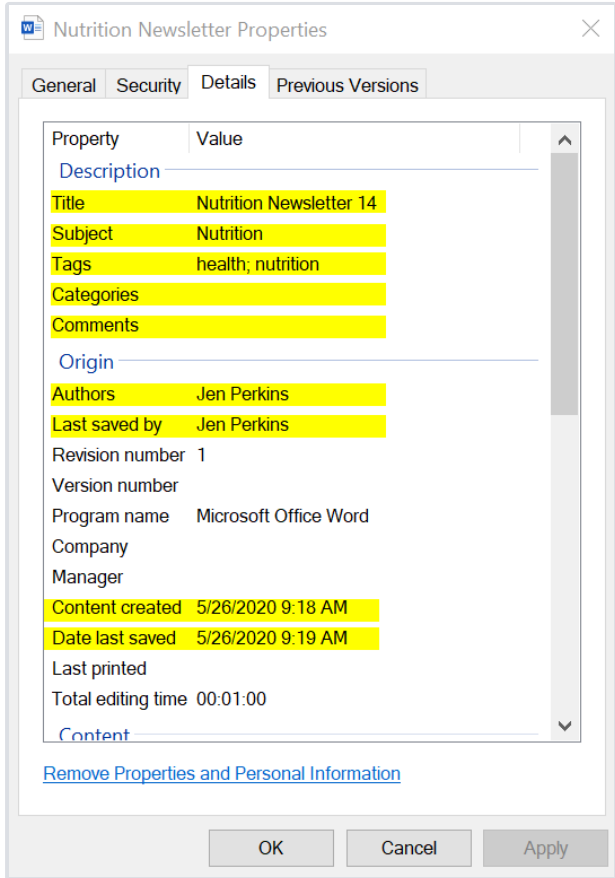
There are several ways in MS Office that you can view, add, and modify the properties:

From within an Office document by clicking **Properties** in the toolbar:

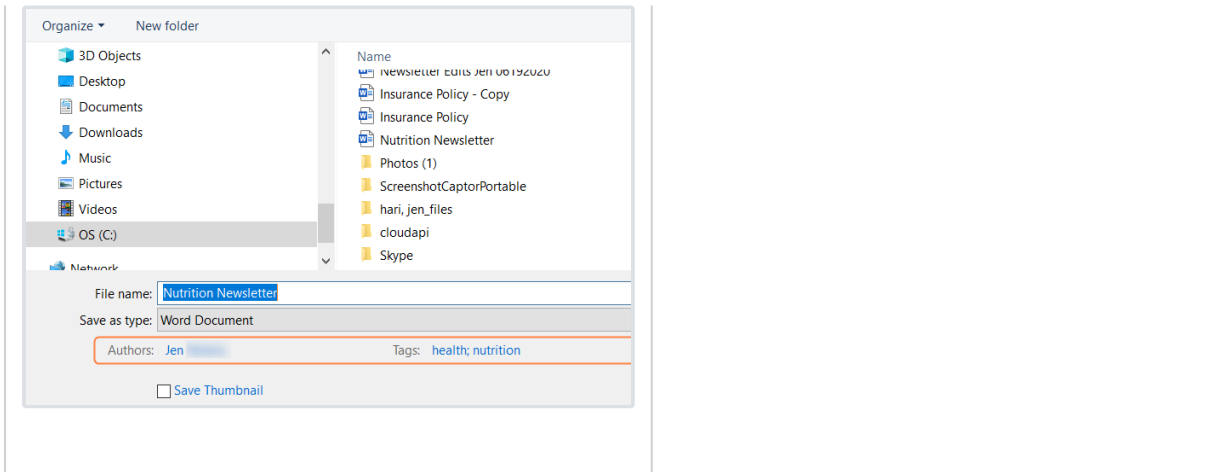


Microsoft Office property	Corresponding FileCloud metadata attribute
Title	Title
Subject	Subject
Tags	Keywords
Categories	Category
Comments	Description
Author	Creator
Last saved by/Last modified by	Last modified by
Content created/Created	Created
Date last saved/Last modified	Modified
Sensitivity	Sensitivity Label

When you right-click an Office document in file explorer and select Properties > Details tab:

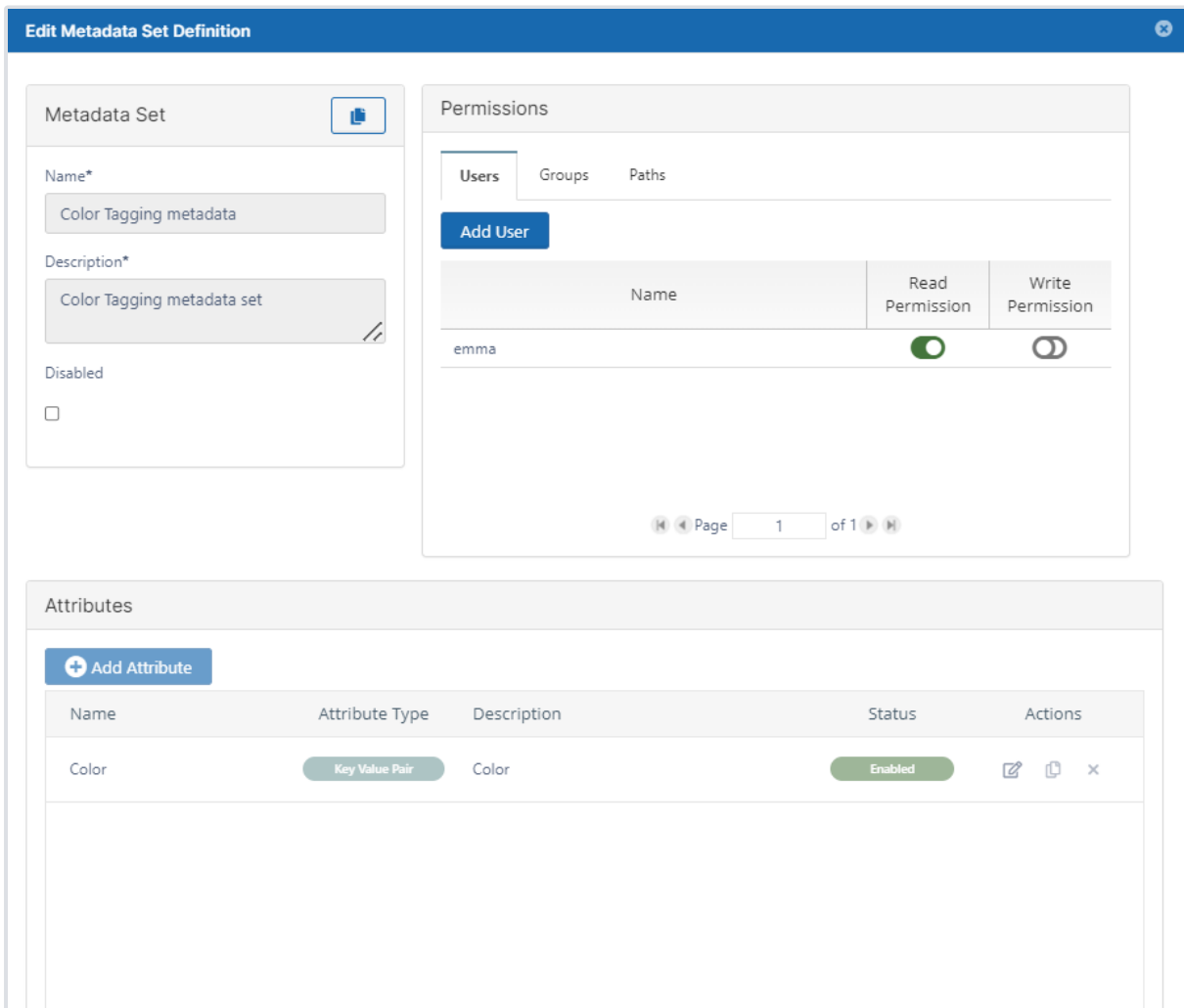


Or when you save an Office document:



### Color Tagging Metadata

The **Color Tagging** metadata set enables you to apply color tags to files and folders. It includes a single **Color** attribute that has six default values: **Red, Yellow, Green, Aqua, Blue,** and **Purple**. Admins can add other color values to the attribute.



Color is the only attribute included in the **Color Tagging** metadata set.

Name	Description	Options
Color	An array of color tags in the format <b>Color:Hexadecimal value</b>	<ul style="list-style-type: none"><li>• Not required</li><li>• Color tags can be added and deleted.</li></ul>

Color values are added to the **Color** attribute with the name of the color and its hexadecimal value. To find hexadecimal codes for colors, see <https://html-color-codes.info/>.

To add values to the Color attribute:

1. To open the **Edit Metadata Set Definition** dialog box, click the Edit button for Color Tagging metadata.
2. Under **Attributes**, click the Edit button for **Color**.  
The **Edit Attribute** dialog box opens.
3. Click in the **Predefined Values** box, and type the name of a color followed by **:#** and then the hexadecimal color code.

Edit Attribute
✕

---

Name

Description

Attribute Type Key Value Pair ▼

Predefined Values

Red:#FF0000 ✕

Yellow:#FF9900 ✕

Green:#18C600 ✕

Aqua:#00B4C9 ✕

Blue:#0054C9 ✕

Purple:#7E00C9 ✕

Orange:#FE9A2E

Disabled

Required

Default Value

Save
Close

4. Click Enter.

The color is saved and formatted with white letters on a blue background.

5. Add any number of custom colors and click **Save**.

The colors now appear as options to users when they apply color tags to files or folders.

For information on applying color tags to files, see [Color Tag Metadata](#).

Beginning with FileCloud 21.1, the Smart Classification can apply color tag values to files.

**Note:** Although users can search on color metadata in both the new and classic user interfaces, they can only apply color tags to files and folders in the new interface.

### PDF Tag metadata

The **PDF Tag** metadata set enables FileCloud to apply FileCloud tags that match default and custom tags in PDF files when they are uploaded.

**Edit Metadata Set Definition**
✕

Metadata Set 📄

Name\*

Description\*

Disabled

Permissions

Users

Groups

Paths

Add User

Name	Read Permission
emma	<input checked="" type="checkbox"/>

⏪ Page 1 of 1 ⏩

Attributes

+ Add Attribute

Name	Attribute Type	Description	Status	Actions
Title	Text	Title of document	Enabled	✎ 📄 ✕
Author	Text	Person who created the document	Enabled	✎ 📄 ✕
Subject	Text	Subject of the document	Enabled	✎ 📄 ✕
Keywords	Array	Keywords associated with the document	Enabled	✎ 📄 ✕

The following attributes are included by default in FileCloud's **PDF Tag** metadata set:

	Description	Options
Title	Title of document.	Read only
Author	Author of document	Read only
Subject	Subject of document.	Read only
Keywords	Keywords associated with document.	Read only
Creator	Application used to create file before it was converted to PDF.	Read only
Producer	Application used to convert this file to PDF.	Read only

Created	Date created.	Read only
Modified	Date last modified.	Read only

### AIP Sensitivity Label metadata

Note: **AIP Sensitivity Label** metadata was added in FileCloud Version 21.2 and currently applies only to Microsoft Office Word, Excel, and PowerPoint files. In the future, it will be applied to additional file types.

**AIP Sensitivity Label** metadata stores sensitivity label information applied to files using Azure Information Protection when the files are uploaded to FileCloud.

The screenshot shows the 'Edit Metadata Set Definition' interface. It is divided into three main sections: Metadata Set, Permissions, and Attributes.

**Metadata Set:** Contains fields for Name\* (AIP Sensitivity Label metadata), Description\* (AIP Sensitivity Label metadata set), and a Disabled checkbox (unchecked).

**Permissions:** Shows a table with columns for Name and Read Permission. The 'Users' tab is active, and a table lists 'emma' with a 'Read Permission' toggle set to 'On'. There is an 'Add User' button above the table.

**Attributes:** Contains an 'Add Attribute' button and a table with columns for Name, Attribute Type, Description, Status, and Actions. The table lists three attributes: 'Enabled' (Boolean), 'Siteld' (Text), and 'Method' (Text).

Name	Attribute Type	Description	Status	Actions
Enabled	Boolean	This attribute indicates whether the classification represented by this set of key-value pairs is enabled for the data item.	Enabled	[Edit] [Copy] [Delete]
Siteld	Text	Azure Active Directory Tenant ID	Enabled	[Edit] [Copy] [Delete]
Method	Text	Standard implies that the label is applied by default or automatically. Privileged implies that the label was manually selected.	Enabled	[Edit] [Copy] [Delete]

The following attributes are included in FileCloud's **AIP Sensitivity Label** metadata set:

	Description	Options
Enabled	Whether the sensitivity label is enabled for this item.	Read only
SiteID	Azure Active Directory tenant ID.	Read only
Method	Indicates whether label was applied by default/automatically or if the label was applied manually. Value may be: <b>Standard</b> - Label was applied by default or automatically. <b>Privileged</b> - Label was applied manually.	Read only
SetDate	Timestamp when label was set.	Read only
Name	Unique label name (may differ from display name).	Read only
Content Bits	Bitmask that describes the types of visual marking that should be applied to the file to identify the sensitivity category. See <a href="https://docs.microsoft.com/en-us/azure/information-protection/configure-policy-markings">https://docs.microsoft.com/en-us/azure/information-protection/configure-policy-markings</a> for more information.	Read only

### CDR metadata

Note: **CDR** metadata was added in FileCloud Version 23.241.4

**CDR** metadata stores a Boolean attribute that indicates whether or not CDR was successful.

### Edit Metadata Set Definition

#### Metadata Set

Name\*  
CDR

Description\*  
Content Disarm and Reconstruction

Disabled

#### Permissions

Users Groups Paths

Search Users to add

Name	Read Permission	Write Permission
No results found		

#### Attributes

Add Attribute

Name	Attribute Type	Description	Status	Actions
CDR successful	Boolean	Whether the Content Disarm and Reconstruction process succeeded	Enabled	

Save Close

The following attribute is included in FileCloud's **CDR** metadata set:

	Description	Options
CDR successful	Whether content disarm and reconstruction was successful for this file.	Read only

### Signority eSignature metadata

Note: **Signority eSignature** metadata was added in FileCloud Version 23.241.4.

**Signority eSignature** metadata stores information about eSignatures applied to the file.

The following attributes are included in FileCloud's **AIP Sensitivity Label** metadata set:

	Description	Options
Completion Date	Date signing was completed.	Read only
Total Signers	Total number of people who received signing requests.	Read only


	Description	Options
Total Rejections	Total number of signers who rejected the document.	Read only
Digital Signature	Whether the signature is a digital signature.	Read only
Signing Request ID	ID of the request to begin the eSignature process.	Read only

### ITAR metadata


Note: **ITAR** metadata was added in FileCloud Version 23.252

ITAR (International Traffic in Arms Regulations) metadata enables you to identify the presence of phrases indicating that a file contains ITAR information. This enables you to apply an appropriate rule or workflow to the file.

**Edit Metadata Set Definition**

Metadata Set 

Name\*  
ITAR Metadata

Description\*  
International Traffic in Arms Regulations metadata set 

Disabled

Permissions










**Users** Groups Paths

Search Users to add

Name	Read Permission	Write Permission
nik8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Attributes

**Add Attribute**

Name	Attribute Type	Description	Status	Actions
ITAR 1	Boolean	ITAR CONTROLLED	Enabled	  
ITAR 2	Boolean	THIS DOCUMENT CONTAINS ITAR CONTROLLED TECHNICAL DATA	Enabled	  
ITAR 3	Boolean	INTERNATIONAL TRAFFIC IN ARMS REGULATIONS	Enabled	  

The following attributes are included in FileCloud's **ITAR** metadata set.



Note that the descriptions are phrases that commonly appear in ITAR documents. If other phrases are used in your ITAR documents, search for those phrases.

	Description	Options
ITAR 1	ITAR CONTROLLED	Read only
ITAR 2	THIS DOCUMENT CONTAINS ITAR CONTROLLED TECHNICAL DATA	Read only
ITAR 3	INTERNATIONAL TRAFFIC IN ARMS REGULATIONS	Read only
ITAR 4	EXPORT CONTROLLED INFORMATION	Read only
ITAR 5	EXPORT CONTROLLED	Read only
ITAR 6	SUBJECT TO ITAR	Read only
ITAR 7	SUBJECT TO THE INTERNATIONAL TRAFFIC IN ARMS REGULATIONS	Read only
ITAR 8	U.S. MUNITIONS LIST	Read only
ITAR 9	TECHNICAL DATA AS DEFINED IN ITAR	Read only
ITAR 10	DEFENSE ARTICLE	Read only
ITAR 11	DDTC EXPORT AUTHORIZATION	Read only
ITAR 12	AUTHORIZED EXPORT ONLY	Read only
ITAR 13	NOT FOR PUBLIC RELEASE	Read only
ITAR 14	NO FOREIGN NATIONALS	Read only
ITAR 15	DISTRIBUTION STATEMENT	Read only

## **CUI metadata**

Note: CUI metadata was added in FileCloud Version 23.252

CUI (controlled unclassified information) metadata enables you to identify the presence of phrases indicating that a file contains CUI information. This enables you to apply an appropriate rule or workflow to the file.

**Edit Metadata Set Definition**

**Metadata Set**

Name\*  
CUI Metadata

Description\*  
Controlled Unclassified Information metadata set

Disabled

**Permissions**

Users Groups Paths

Search Users to add

Name	Read Permission	Write Permission
No results found		

**Attributes**

Add Attribute

Name	Attribute Type	Description	Status	Actions
Basic	Boolean	Indicates general CUI content governed by standard handling procedures, without additional regulatory categories.	Enabled	

The following attributes are included in FileCloud's **CUI** metadata set:

	Description	Options
Basic	Indicates general CUI content governed by standard handling procedures, without additional regulatory categories.	Read only
Specified	Identifies CUI content tied to specific legal or regulatory requirements, marked with SP-designations.	Read only

## Working with Custom Metadata

FileCloud allows you to create fully customizable sets of metadata, defined by the administrator.

### Managing Metadata Sets

[Create a new Set Definition](#)

[Manage Metadata Permissions](#)

[Edit an existing Set Definition](#)

#### Delete a Set Definition

⚠ The **Default** metadata Set cannot be removed.

⚠ You cannot undo or revert deletions.

To delete an existing Custom metadata set definition:

1. Log in to the Admin Portal.
2. In the *Home* navigation panel on the left side, under *Misc.*, select *Metadata*.
3. In the *Manage Metadata Sets* section, select the one you want to grant access, and then click the delete icon .

#### View the Set Definition List

The metadata set definitions screen displays the list of defined metadata sets.

- The filter text box can be used to filter the metadata sets based on the metadata name.
- The individual metadata set on the metadata list can be viewed, edited and deleted.
- New metadata sets can be added by clicking the Add Metadata Set button and filling in the metadata set definition form.

FILECLOUD admin

HOME: Dashboard

USERS/GROUPS: Users, Groups, Admins

MANAGE: Team Folders, Network Folders, User Shares, Folder Permissions

DEVICES: Devices

MISC.: Audit, Alerts, User Locks, Workflows, Reports, Federated Search

SETTINGS: Metadata

### Manage Metadata Sets

Filter:  Show 10 Items

Metadata Set Name	Description	Status	Set Type	User Count	Group Count	ACTIONS
Default	Default metadata set definition will be automatically bound to every single File and Folder.	Enabled	DEFAULT	0	1	<a href="#">Edit</a> <a href="#">Delete</a>
Invoicing	Additional information about invoices	Enabled	Custom	0	1	<a href="#">Edit</a> <a href="#">Delete</a>
Assets	Metadata set with media campaign information	Enabled	Custom	0	2	<a href="#">Edit</a> <a href="#">Delete</a>

Page 1 of 1  
3 rows

## Working with Default Metadata

**Default** is a special metadata set that is automatically associated with every File Object when it is created, copied, uploaded, etc.

- For already existing File Objects it will be associated when the file or folder is accessed for the first time.
- Exactly one Default Set exists in FileCloud - it cannot be deleted, but administrators can customize attributes and permissions or disable it.
- Out of the box it is shipped with a single predefined attribute of Array type - Tags.

### Manage Metadata Sets

Filter:  Show 10 Items

Metadata Set Name	Description	Status	Set Type	User Count	Group Count	Actions
Defaults	Default metadata set definition will be automatically bound to every single File and Folder.	Enabled	DEFAULT	0	0	<a href="#">Edit</a> <a href="#">Delete</a>
Image metadata	Image metadata (EXIF)	Enabled	Built-in	1	1	<a href="#">Edit</a> <a href="#">Delete</a>
Document Life Cycle metadata	Stores information regarding document life cycle	Enabled	Built-in	1	1	<a href="#">Edit</a> <a href="#">Delete</a>
Date	dfsdf	Enabled	Custom	3	0	<a href="#">Edit</a> <a href="#">Delete</a>

The following attributes can be edited in the DEFAULT metadata set:

**Edit Metadata Set Definition**

**Metadata Set**

Name\*

Description\*

Disabled

**Permissions**

Users Groups Paths

**Add User**

Name	Read Permission	Write Permission
emma	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Page 1 of 1

**Attributes**

**+ Add Attribute**

Name	Attribute Type	Description	Status	Actions
Tags	Array	Tags	Enabled	

	Description	Options
Name	Title for the metadata set.	<ul style="list-style-type: none"> <li>Required</li> <li>This can be changed</li> <li>Validated on Creation</li> </ul>
Description	By default, says: Default metadata set definition will be automatically bound to every single File and Folder.	<ul style="list-style-type: none"> <li>Required</li> <li>This can be changed</li> <li>Validated on Creation</li> </ul>
Disabled	Stops the metadata set from being automatically bound to every new file and folder.	<ul style="list-style-type: none"> <li>By default this is not selected</li> <li>You can choose to disable this set</li> </ul>

	Description	Options
User Permissions	Grant access to specific users to: <ul style="list-style-type: none"> <li>• Read: this permission displays the metadata to the user in the User Portal</li> <li>• Write: this permission allows the user to add, edit, copy, or paste a value</li> </ul> For more information, read <a href="#">Managing Metadata Permissions</a>	<ul style="list-style-type: none"> <li>• Not Required</li> <li>• Read</li> <li>• Write</li> </ul>
Group Permissions	Grant access to specific groups to: <ul style="list-style-type: none"> <li>• Read: this permission displays the metadata to the user in the User Portal</li> <li>• Write: this permission allows the user to add, edit, copy, or paste a value</li> </ul> For more information, read <a href="#">Managing Metadata Permissions</a>	<ul style="list-style-type: none"> <li>• Not Required</li> <li>• Read</li> <li>• Write</li> </ul>
Path Permissions	File Objects in this location will have the metadata set applied For more information, read <a href="#">Managing Metadata Permissions</a>	<ul style="list-style-type: none"> <li>• Not Required</li> </ul>
Array	A number of custom values (tags) provided by the administrator	<ul style="list-style-type: none"> <li>• Name</li> <li>• Description</li> <li>• Disabled</li> <li>• Required</li> <li>• Tag Input</li> </ul>

[How To Edit a Metadata Set](#)

## Finding files without metadata

Smart Classification does not apply metadata to files over a specified size, but you can add metadata to those files manually. Beginning in FileCloud 20.1, you can configure your system to search for files without metadata.

### Find files without metadata:

1. Open the configuration file:  
 Windows: XAMPP DIRECTORY/htdocs/config/cloudconfig.php  
 Linux: /var/www/config/cloudconfig.php
2. Add the line:

```
define('TONIDOCLOUD_SHOW_FILES_WITHOUT_METADATA', true);
```

3. In the navigation bar, click **Metadata**.

Now the upper-right corner of the Manage Metadata Sets screen displays a **Files Without Metadata** button.

Metadata Set Name	Description	Status	Set Type	User Count	Group Count	Actions
Default	Default metadata set definition will be automatically bound to every single File and Folder.	Enabled	DEFAULT	0	0	
Image metadata	Image metadata (EXIF)	Enabled	Built-in	0	1	
Document Life Cycle metadata	Stores information regarding document life cycle	Enabled	Built-in	0	0	
Microsoft Office Tag metadata	Microsoft Office Tag metadata (MSOT)	Enabled	Built-in	0	1	
Color Tagging metadata	Color Tagging metadata set	Enabled	Built-in	1	1	
DLP allowed	Indicates whether DLP should be able to prevent downloading or sharing of these files.	Enabled	Custom	0	0	
Confidential Documents	Confidential Documents	Enabled	Custom	0	1	

4. To display a list of files without metadata, click **Files Without Metadata**.

Filename	File Type	Size	Date	Actions
/jenniferp	Folder			
/team folder account	Folder			
/team folder account/Human Resources	Folder			
/team folder account/Sales	Folder			
/team folder account/recyclebin	Folder			
/jessicam	Folder			
/jenniferp/ShareFolder	Folder			

### Add metadata from the Files Without Metadata list

1. Follow the procedure above to access your **Files Without Metadata** list.
2. Across from a file, click the button under **Actions**.

Filename	Size	Date	Actions
/jenniferp/DriveSSOLogin.jpg	26 KB	Apr 02, 2020 1:59 PM	

The Manage File Metadata window opens.

Manage File Metadata

Add codes Custom metadata

▼ Default Default metadata

Tags

Tag input

Save

▶ Document Life Cycle metadata Builtin metadata

Close

The top drop-down list holds [custom metadata](#), the drop-down list below that holds [default metadata](#), and any drop-down lists below that hold [built-in metadata](#).

3. To add a custom metadata set, choose it in the drop-down list and click **Add**. It is added below the other metadata sets.
4. Add or change values in any of the metadata fields.

Manage File Metadata ✕

---

Add No metadata available ▼

▶ **Default** ⓘ

▶ **Document Life Cycle metadata** ⓘ

▼ **codes** ⓘ ✕ Remove

color ⓘ

alphanumeric ⓘ

label ⓘ

Save

---

Close

5. You can update the value of fields that appear in the **Default** metadata set.. Expand the section, and add or change the values in the metadata fields, and click **Save**.

Manage File Metadata
✕

---

Add
No metadata available
▼

**▼ Default<sup>i</sup>**

Tags <sup>i</sup>

customer ✕
admin ✕

version <sup>i</sup>

2.0

Save

▸ Document Life Cycle metadata<sup>i</sup>

▸ codes<sup>i</sup> ✕ Remove

Close

6. You can view, but not update the values in built-in metadata sets. Expand the sections to view the metadata and any values they have.

## Metadata Limitations/Recommendations

Metadata feature	Recommended maximum
Metadata set name	128 characters
Metadata set description	128 characters
Attributes per metadata set	99

<b>Metadata feature</b>	<b>Recommended maximum</b>
Attribute name	128 characters
Attribute description	128 characters
Values per enum/array	99
Predefined value (enum)	128 characters
Default value	128 characters
Actual value	128 characters

# Managing FileCloud Licenses

Your FileCloud license provides legally binding guidelines on your use and distribution of FileCloud.

In this section:

## FileCloud - License Purchase And Renewal

### Purchase a new license

First


Choose a server or online license

1. Log into <https://portal.getfilecloud.com>
2. Click the **New license** icon.


The screenshot displays the FileCloud portal interface. On the left is a sidebar with navigation links: Dashboard, Sites, Downloads, SPLA Reports, and Billing. The main area is titled 'Sites & Licenses' and features a search bar and a 'Show all' button. A 'New license' button is highlighted with a red dashed box and an orange arrow. Below this, there are three license cards: one for 'www' (5 seats, pending), one for 'ctest1.filecloudonline.com' (20 seats, expired), and a 'View all' button. A 'Useful Resources' section is also visible, containing links for 'Get started', 'Learn More', and 'Downloads'.

3. In the **Buy FileCloud** window, click **Online** or **Server**.

Buy FileCloud ✕



**Online**  
Run FileCloud on our  
secure infrastructure



**Server**  
Run FileCloud on your  
own infrastructure

or

If you are a Service Provider

[Looking for other items](#)

[Need help?](#)  
Contact us

Cancel

**Then**

**Purchase the server license**

If you choose **Server**, the next window prompts you to choose **Essentials, Advanced, or Service Provider**.

Buy FileCloud
✕

### FileCloud Server

Run FileCloud on your own infrastructure

	RECOMMENDED	
<p><b>Essentials</b></p> <p><b>\$6 user/mo</b></p> <p>minimum 20 users, billed annually ⓘ</p> <p><a href="#" style="border: 1px solid #0070c0; padding: 5px 15px; text-decoration: none; color: #0070c0;">BUY</a></p>	<p><b>Advanced</b></p> <p>Custom pricing available</p> <p><a href="#" style="border: 1px solid #0070c0; padding: 5px 15px; text-decoration: none; color: #0070c0;">GET QUOTE</a></p>	<p><b>Service Provider</b></p> <p>Custom pricing available</p> <p><a href="#" style="border: 1px solid #0070c0; padding: 5px 15px; text-decoration: none; color: #0070c0;">GET QUOTE</a></p>
<ul style="list-style-type: none"> <li>✓ Unlimited Storage</li> <li>✓ Unlimited Licensed External Users</li> <li>✓ Support for Network Shares with NTFS Integration for VPN-less secure access.</li> <li>✗ Content Classification &amp; Search</li> <li>✗ Content Lifecycle Management - Legal Hold, Retention, &amp; Archival</li> <li>✗ Unlimited Workflows</li> <li>✗ Digital Rights Management</li> <li>✗ Key Integrations - MS Teams, Salesforce, Active Directory &amp; SIEM</li> <li>✗ Optimized Multi-Site Architecture (high-performance, scalable and redundant data access in distributed data center environments)</li> </ul>	<ul style="list-style-type: none"> <li>✓ Unlimited Storage</li> <li>✓ Unlimited Licensed External Users</li> <li>✓ Support for Network Shares with NTFS Integration for VPN-less secure access.</li> <li>✓ Content Classification &amp; Search</li> <li>✓ Content Lifecycle Management - Legal Hold, Retention, &amp; Archival</li> <li>✓ Unlimited Workflows</li> <li>✓ Digital Rights Management</li> <li>✓ Key Integrations - MS Teams, Salesforce, Active Directory &amp; SIEM</li> <li>✓ Optimized Multi-Site Architecture (high-performance, scalable and redundant data access in distributed data center environments)</li> </ul>	<ul style="list-style-type: none"> <li>✓ Unlimited Storage</li> <li>✓ Unlimited Licensed External Users</li> <li>✓ Support for Network Shares with NTFS Integration for VPN-less secure access.</li> <li>✓ Content Classification &amp; Search</li> <li>✓ Content Lifecycle Management - Legal Hold, Retention, &amp; Archival</li> <li>✓ Unlimited Workflows</li> <li>✓ Digital Rights Management</li> <li>✓ Key Integrations - MS Teams, Salesforce, Active Directory &amp; SIEM</li> <li>✓ Optimized Multi-Site Architecture (high-performance, scalable and redundant data access in distributed data center environments)</li> </ul>

If you click **Advanced** or **Service Provider**, in the window that opens, choose an option for contacting Sales and making your purchase.

Contact Us
✕

**Sales** Available Now ⓘ

Questions, feedbacks, comments about your license?

- [Chat Now ⓘ](#) ↗
- [Schedule a free demo](#)
- [sales@filecloud.com](mailto:sales@filecloud.com) ↗
- [+1 \(888\) 571-6480](tel:+18885716480) ↗

**Support** Available Now ⓘ

Need help with FileCloud?

- [support@filecloud.com](mailto:support@filecloud.com)
- [Submit a Ticket](#)

[Close](#)

If you choose **Essentials**, an **Order details** window opens.

Order details
✕

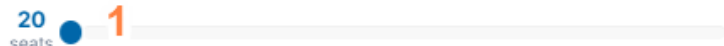
---

### FileCloud Server - Enterprise Essentials

Starting at \$6.00 per user, per month, minimum 20 users

---

**Number of Users** Drag the slider below to change

20  1  
seats

**Recommended Support** Optional

**FileCloud Premium Live Support**  
Premium Live Technical Support for FileCloud Server Enterprise Essentials - M - F Business Hours, Response SLA - \$1.00 per user, per month.


**FileCloud Extended Live Support**  
Extended Live Technical Support for FileCloud Server Enterprise Essentials - 24/7 Support, Response SLA - \$2.00 per user, per month.

**FileCloud Self Service Email Technical Support**  
Free

**Licensed Site URL** ⓘ

3

---

 **Need professional assistance?**

Professional services option available to assist with deployment, configuration, and customization. Please get in touch with us at [sales@filecloud.com](mailto:sales@filecloud.com).

---

**Total** Billed annually ⓘ

---

**Need help?**  
Contact us

Back

4 Checkout

1. Move the **Number of Users** slider to indicate the number of users to include on the license.
2. Choose a support option.
3. In **Licensed Site URL**, enter your site address.
4. Click **Checkout**.
5. Perform the [checkout process](#), below.

or

### Purchase the online license

If you choose **Online**, the next window prompts you to choose **Essentials**, **Advanced**, or **GovCloud**.

Buy FileCloud ✕

**FileCloud Online**  
Run FileCloud on our secure infrastructure

Essentials	RECOMMENDED Advanced	GovCloud
<b>\$12<sup>50</sup> user/mo</b> minimum 10 users, billed annually ⓘ	<b>\$18<sup>75</sup> user/mo</b> minimum 50 users, billed annually ⓘ	Custom pricing available
<a href="#">BUY</a>	<a href="#">BUY</a>	<a href="#">GET QUOTE</a>
✓ 1 TB, 100 GB per User	✓ 1 TB, 200 GB per User	✓ 1 TB, 200 GB per User
✓ Unlimited Licensed External Users	✓ Unlimited Licensed External Users	✓ Unlimited Licensed External Users
✓ Region-Specified, Dedicated Single-Tenant Hosting - Fully Isolated Data-Layer Protection	✓ Region-Specified, Dedicated Single-Tenant Hosting - Fully Isolated Data-Layer Protection	✓ Region-Specified, Dedicated Single-Tenant Hosting - Fully Isolated Data-Layer Protection
✗ Sync/Backup Local File Server to Cloud	✓ Sync/Backup Local File Server to Cloud	✓ Sync/Backup Local File Server to Cloud
✗ Content Classification & Search	✓ Content Classification & Search	✓ Content Classification & Search
✗ Content Lifecycle Management - Legal Hold, Retention, & Archival	✓ Content Lifecycle Management - Legal Hold, Retention, & Archival	✓ Content Lifecycle Management - Legal Hold, Retention, & Archival
✗ Unlimited Workflows	✓ Unlimited Workflows	✓ Unlimited Workflows
✗ Digital Rights Management	✓ Digital Rights Management	✓ Digital Rights Management
✗ Key Integrations - MS Teams, Salesforce, Active Directory & SIEM	✓ Key Integrations - MS Teams, Salesforce, Active Directory & SIEM	✓ Key Integrations - MS Teams, Salesforce, Active Directory & SIEM
✗ Enable compliance with FIPS 140-2, ITAR, EAR, + Other Regulations	✗ Enable compliance with FIPS 140-2, ITAR, EAR, + Other Regulations	✓ Enable compliance with FIPS 140-2, ITAR, EAR, + Other Regulations
<a href="#">More...</a>	<a href="#">More...</a>	<a href="#">More...</a>








If you click the **GovCloud**, in the window that opens, choose an option for contacting Sales and making your purchase.

Contact Us ✕

---



### Sales Available Now ⓘ

Questions, feedbacks,  
comments about your license?

-  [Chat Now ⓘ](#) 
-  [Schedule a free demo](#)
-  [sales@filecloud.com](mailto:sales@filecloud.com) 
-  [+1 \(888\) 571-6480](tel:+1(888)571-6480) 

### Support Available Now ⓘ

Need help with FileCloud?

-  [support@filecloud.com](mailto:support@filecloud.com)
-  [Submit a Ticket](#)

[Close](#)

If you choose **Essentials** or **Advanced**, an **Order details** window opens. It is similar for both options,

but shows different minimum number of users and support options.

Order details
✕

---

### FileCloud Online - Enterprise Advanced

Starting at \$18.75 per user, per month, minimum 50 users

---

**Number of Users**

50 seats 1

Drag the slider below to change

---

**Recommended Support** Optional

**FileCloud Premium Live Support**  
Premium Live Technical Support for FileCloud Online Enterprise Advanced - M - F Business Hours, Response SLA - \$2.00 per user, per month.

**FileCloud Extended Premium Live Support** 2  
Extended Premium Live Technical Support for FileCloud Online Enterprise Advanced - 24/7 Support, Response SLA - \$3.30 per user, per month.

**FileCloud Self Service Email Technical Support**  
Free

---

**Licensed Site URL** 3

**Preferred Region**

 4

---

**Need professional assistance?**

Professional services option available to assist with deployment, configuration, and customization. Please get in touch with us at [sales@filecloud.com](mailto:sales@filecloud.com).

---

**Included Storage**

**Total**

Billed annually 5

**1 TB**

---

[Need help?](#)  
Contact us

1. Move the **Number of Users** slider to indicate the number of users to include.
2. Choose a support option.
3. In **Licensed Site URL**, enter your site address.
4. In **Preferred Region**, choose the region where you want your server located.
5. Click **Checkout**.
6. Perform the [checkout process](#), below.

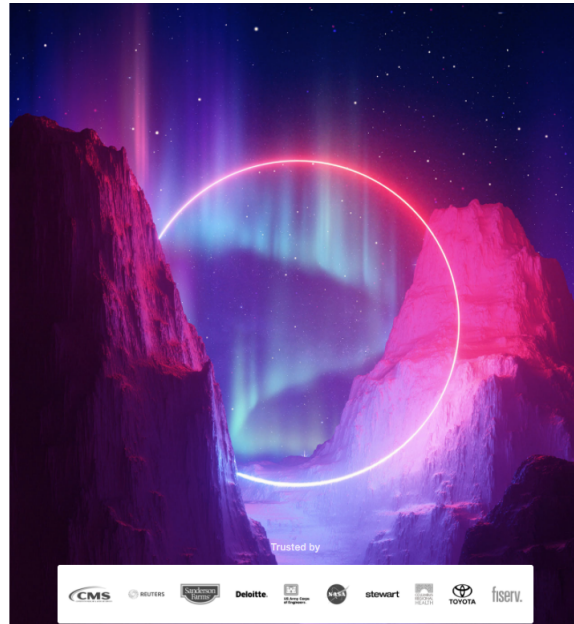
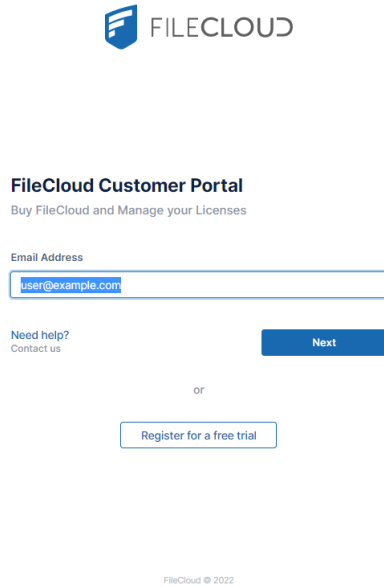
## Renew an existing license

### Renew a license

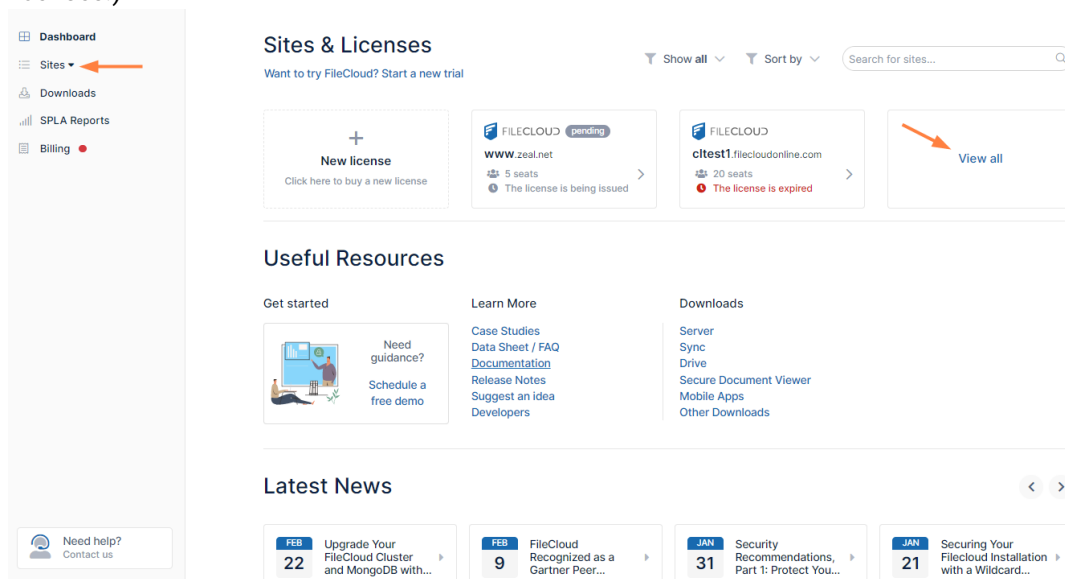
**Note: If you are an MSP and want to renew an SPLA License, please follow the [purchase a new license instructions](#), above.**

1. Log into <https://portal.getfilecloud.com>

*Note: Enter the email of the license holder. To change the license holder email, please contact [sales@codelathe.com](mailto:sales@codelathe.com).*



2. If you don't see the license you want to renew on the initial dashboard page, click **View all** to view all of your licenses.  
(You can also expand the **Sites** link in the navigation pane to see navigation links to all of your licenses.)



3. Find and click the license that you want to renew.

The screenshot shows the 'Sites & Licenses' dashboard. On the left is a navigation menu with 'Dashboard', 'Sites', 'Downloads', 'SPLA Reports', and 'Billing'. The main area displays a grid of license cards. One card for 'OnPremise' (20 seats, expires in 898 days) has a red arrow pointing to a 'Renew' button. Other cards include 'New license', 'Server Trial', and 'SPLA'. A 'Useful Resources' section is visible at the bottom.

A screen that displays the license details opens.

4. Click the **Renew** button.

The screenshot shows the 'FILECLOUD ONPREMISE' license details page. Under the 'Usage' section, it displays '0 days left' and '20 seats Server Standard'. A blue 'Renew' button is highlighted with a red arrow. To the right, there are sections for 'Getting Started with your FileCloud Server' and 'Quick Actions'.

An **Order Summary** opens.

5. Follow the [checkout process](#), below.

## Add additional users to an existing license

### Add additional users to a license

1. Log into <https://portal.getfilecloud.com>

*Notes: Enter the email of the license holder. To change the license holder email, please email [sales@codeatthe.com](mailto:sales@codeatthe.com).*



## FileCloud Customer Portal

Buy FileCloud and Manage your Licenses

Email Address

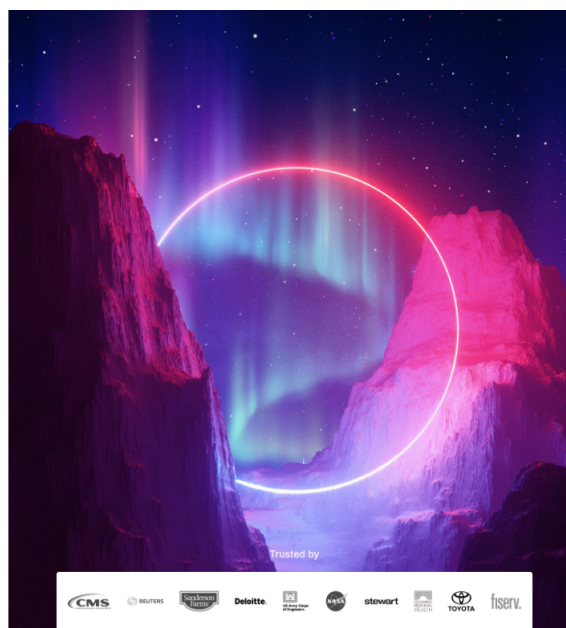
Need help?  
Contact us

Next

or

Register for a free trial

FileCloud © 2022



- If you don't see the license you want to add users to on the initial dashboard page, click **View all** to view all of your licenses.  
(You can also expand the **Sites** link in the navigation pane to see navigation links to all of your licenses.)

**Sites & Licenses**

Want to try FileCloud? Start a new trial

[+ New license](#)  
 Click here to buy a new license

**FILECLOUD** pending  
 www.zeal.net  
 5 seats  
 The license is being issued

**FILECLOUD**  
 cctest1.filecloudonline.com  
 20 seats  
 The license is expired

[View all](#)

**Useful Resources**

**Get started**  
 Need guidance?  
 Schedule a free demo

**Learn More**  
 Case Studies  
 Data Sheet / FAQ  
[Documentation](#)  
 Release Notes  
 Suggest an Idea  
 Developers

**Downloads**  
 Server  
 Sync  
 Drive  
 Secure Document Viewer  
 Mobile Apps  
 Other Downloads

**Latest News**

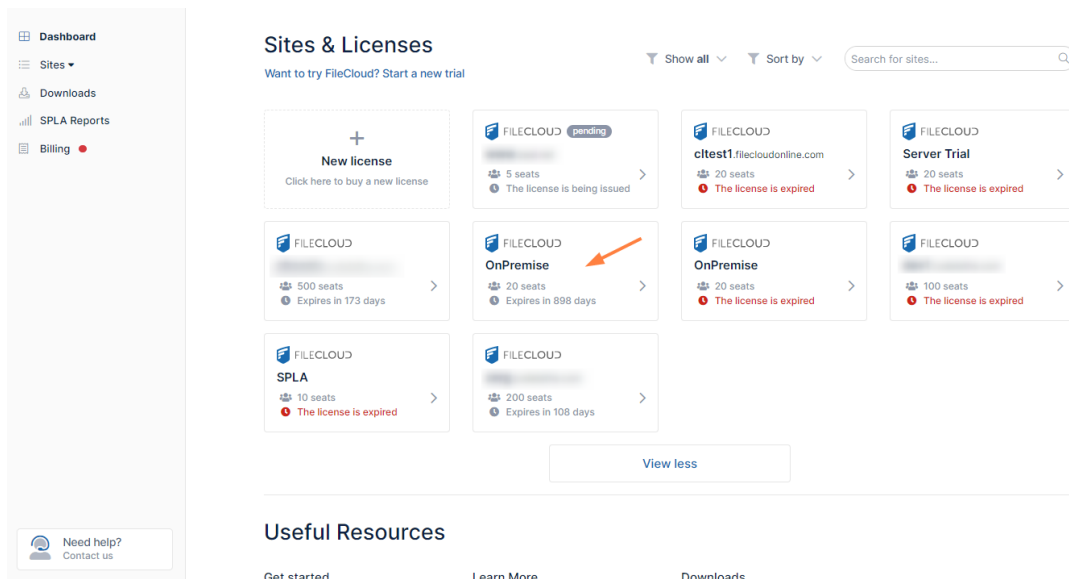
**FEB 22** Upgrade Your FileCloud Cluster and MongoDB with...

**FEB 9** FileCloud Recognized as a Gartner Peer...

**JAN 31** Security Recommendations, Part 1: Protect You...

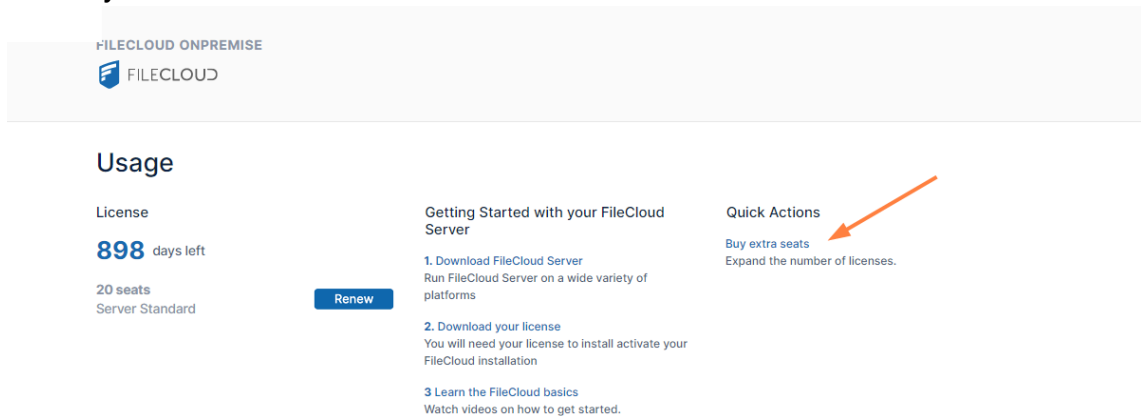
**JAN 21** Securing Your Filecloud Installation with a Wildcard...

- Find and click the license that you want to add additional users to.



A screen that displays the license details opens.

- 4. Click **Buy extra seats**.



A checkout window opens. The number of extra seats is set to 1 by default.

- 5. If you want to purchase more than 1 extra seat, move the **Number of Users** slider to indicate the number of seats you want to buy.

Checkout ✕

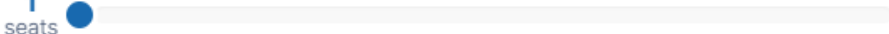
### FileCloud Server - Enterprise Advanced

Additional licenses for jenperkins.com

---

Your license expires in 361 days, you will be charged proportionately

Additional licenses Drag the slider below to change

1 seats 

Additional Seats 1 Seats

Total \$

Billed anually ⓘ

[Need help?](#)  
Contact us


6. Click **Checkout**.  
An **Order Summary** opens.
7. Follow the [checkout process](#).

## Checkout process

### Pay now

1. Look over the order summary, and if necessary, edit the billing details:

**Order summary** ✕

**Billing Details**  [Edit Billing Details](#)

**filecloud**  
5 Main Street  
Newtown / MA / 55555  
United States

**Additional Info**

<b>P.O. Number</b>	Optional	<b>Notes</b>	Optional
<input type="text"/>		<input type="text"/>	

**Items**


**50x FileCloud Server - Enterprise Advanced Renewal**  
On-premise, Private Cloud-based Enterprise Advanced File Sharing and Collaboration Software Platform. Base Support Only. 50 User Lic. Minimum Req. Renewal. Renew License for jenperkins.com

---

**Invoice Number** FC-30574

**Order Sub Total**

**Sales Tax**

**Total Due**  
All prices are in U.S. Dollars 

[Need help?](#)  
Contact us

2. Click **Checkout**.

Checkout

**Card Payment**

Card number MM / YY CVC

Invoice Number **FC-30574**

Order Sub Total

Sales Tax

Total Due

All prices are in U.S. Dollars

By proceeding you accept FileCloud's [Terms of Service](#)

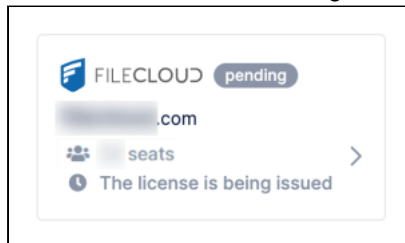
The credit card data is secured, encrypted, and processed by **stripe**

Need help?  
Contact us

Save Quote

Pay Now

3. Enter your credit card number, and click **Pay Now**.  
A confirmation window appears.
4. Click **Dashboard** in the navigation pane to see an icon for your new pending license:



5. When processing of the license is complete and the new license has been installed for you, the pending icon disappears.

or

### Send a purchase order

1. Look over the order summary, and if necessary, edit the billing details:

Order summary
✕

**Billing Details** → Edit Billing Details

filecloud  
5 Main Street  
Newtown / MA / 55555  
United States

**Additional Info**

P.O. Number → Optional

Notes → Optional

**Items**

**50x FileCloud Online - Enterprise Advanced (files.site.com)**  
Fully managed, Cloud-based Enterprise Advanced File Sharing and Collaboration Platform. Base Support Only. 50 User Lic. Minimum Req.

**50x FileCloud Premium Live Support - Online Enterprise Advanced**  
Premium Live Technical Support for FileCloud Online Enterprise Advanced - M - F Business Hours, Response SLA

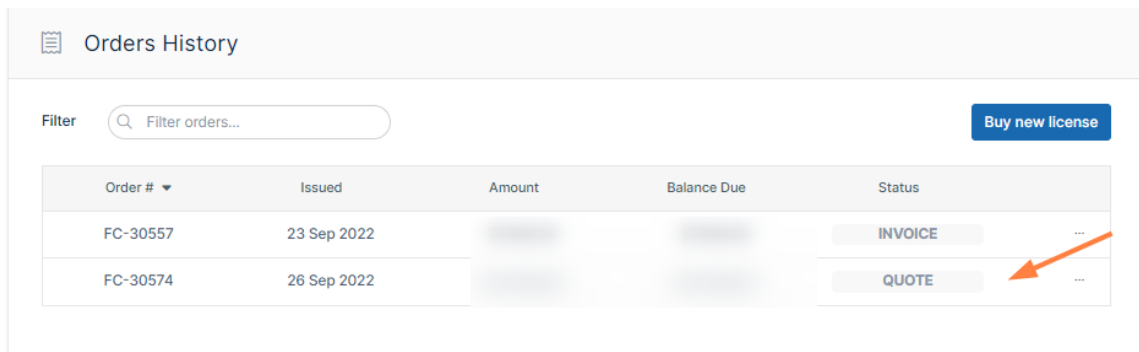
<b>Invoice Number</b>	FC-30574
<b>Order Sub Total</b>	\$12,500.00
<b>Sales Tax</b>	\$0.00
<b>Total Due</b>	\$12,500.00

All prices are in U.S. Dollars

**Need help?**

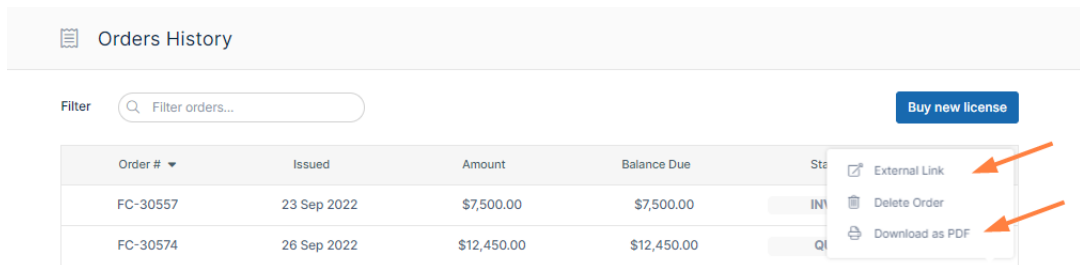
Contact us

2. Optionally, enter a **P.O. Number** and any **Notes** for FileCloud Sales.
3. Click **Save Quote**.  
The **Billing** screen opens.
4. Your order appears under **Orders History** with the status **QUOTE**.



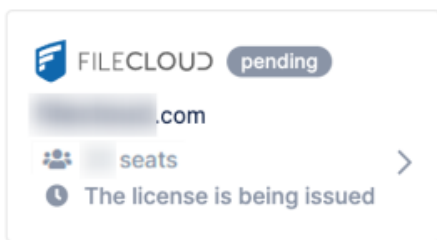
5. Click the **More** (triple-dot) icon in the row for the order, and either:

- choose **External Link** and copy the link,  
or
- choose **Download as PDF** and save the PDF.



6. Send a purchase email to [sales@codelathe.com](mailto:sales@codelathe.com) with the quote link included or the PDF attached.

7. Once FileCloud begins to process the license, it is overlaid with a pending icon.



When processing of the license is complete and the new license has been installed for you, the pending icon disappears.

or

**Save quote and continue later**

1. Look over the order summary, and if necessary, edit the billing details:

Order summary
✕

### Billing Details

[Edit Billing Details](#)

**filecloud**  
5 Main Street  
Newtown / MA / 55555  
United States

### Additional Info

P.O. Number	Optional	Notes	Optional
<input style="width: 100%;" type="text"/>		<input style="width: 100%;" type="text"/>	

### Items

**50x FileCloud Online - Enterprise Advanced (files.site.com)**  
Fully managed, Cloud-based Enterprise Advanced File Sharing and Collaboration Platform. Base Support Only. 50 User Lic. Minimum Req.

**50x FileCloud Premium Live Support - Online Enterprise Advanced**  
Premium Live Technical Support for FileCloud Online Enterprise Advanced - M - F Business Hours, Response SLA

<b>Invoice Number</b>	FC-30574
<b>Order Sub Total</b>	
<b>Sales Tax</b>	
<b>Total Due</b>	
All prices are in U.S. Dollars	

[Need help?](#)  
Contact us

[Save Quote](#)

[Checkout](#)

2. Click **Save Quote**.

The **Billing** screen opens. Your order appears under **Orders History** with the status **QUOTE**, and remains there unless you delete it.

Orders History

Filter  [Buy new license](#)

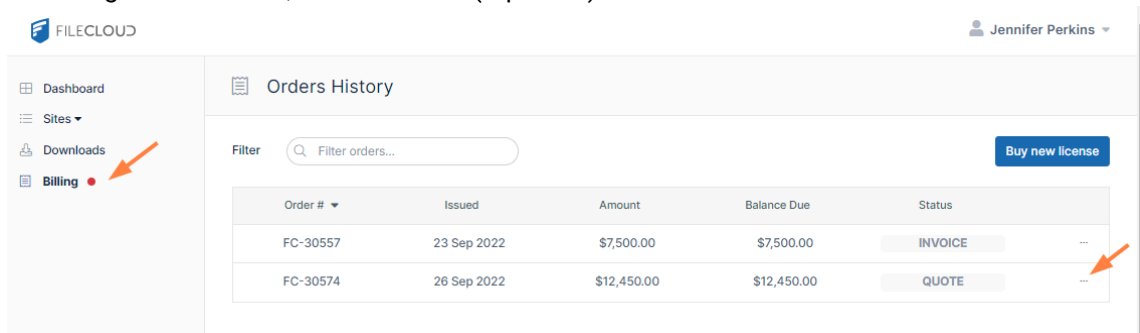
Order # ▼	Issued	Amount	Balance Due	Status
FC-30557	23 Sep 2022			INVOICE <span style="float: right;">...</span>
FC-30574	26 Sep 2022			QUOTE <span style="float: right;">...</span>

- When you are ready to continue, return to the **Billing** screen and perform one of the actions in [Manage orders](#), below.

## Manage orders

### View order, save order link, save to pdf or delete order history

- Log into <https://portal.getfilecloud.com>
- In the navigation pane, click the **Billing** link.
- To the right of the order, click the **More** (triple-dot) icon.



FILECLOUD Jennifer Perkins

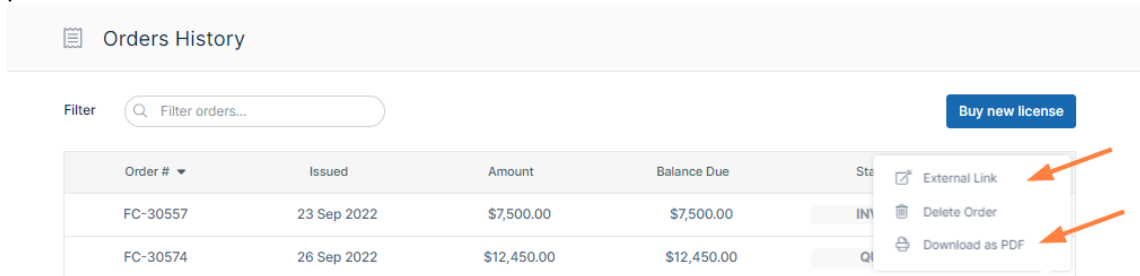
Dashboard Sites Downloads **Billing**

Orders History

Filter  [Buy new license](#)

Order #	Issued	Amount	Balance Due	Status	
FC-30557	23 Sep 2022	\$7,500.00	\$7,500.00	INVOICE	...
FC-30574	26 Sep 2022	\$12,450.00	\$12,450.00	QUOTE	...

- You are given options to view the order in another link, delete it, or download it as a PDF. If you click **External Link**, you can copy the link and send it to another user to view the order or you can send it to FileCloud to purchase it. You can also send a copy of the PDF to FileCloud to purchase the order.



Orders History

Filter  [Buy new license](#)

Order #	Issued	Amount	Balance Due	Status	
FC-30557	23 Sep 2022	\$7,500.00	\$7,500.00	INVOICE	...
FC-30574	26 Sep 2022	\$12,450.00	\$12,450.00	QUOTE	...

- External Link
- Delete Order
- Download as PDF

## Workflows - IFTTT

Administrators can use workflows to automate certain standard operations within FileCloud.

Workflows operate using the following model:

IF "CONDITION" - THEN "ACTION" (IFTTT)

You can setup specific triggers to run when the following conditions occur:

- A system event
- A specific date and time
- A variety of actions

💡 Each of the Conditions and Actions may require a parameter in JSON format.

## The Workflow Dashboard







All workflows are created and managed on the Workflows dashboard.

Manage Workflows						
Workflow Name	IF THIS	THEN THAT	Last Check	Last Action	Enabled	Actions
client app connects	If any new client app connects	Notify user(s)	May 30, 2025, 4:40 pm	May 27, 2025, 7:09 pm	<input checked="" type="checkbox"/>	▶ ⏸ 📄 🔄 ✕
when a file created	If a file is created	Notify file actions to user(s)	May 30, 2025, 4:43 pm	December 3, 2024, 5:31 am	<input checked="" type="checkbox"/>	▶ ⏸ 📄 🔄 ✕
New Client	If any new client app connects	Notify user(s)	May 30, 2025, 4:40 pm	May 27, 2025, 7:09 pm	<input checked="" type="checkbox"/>	▶ ⏸ 📄 🔄 ✕

### To access the Workflows dashboard:

1. Open a browser and log into the admin portal.
2. On the left hand navigation panel, under **MISC.**, click **Workflows**.

The actions you can perform on a workflow you have created include:

Enabled	Actions
1 	2 3 4 5 6     

1. Enable or Disable the workflow
2. Run the workflow (once, on-demand)
3. Simulate the workflow. Displays the list of users or files that a workflow will affect. The Simulate option is only available to workflows that are configured to run on demand and not to run automatically at scheduled times.
4. Edit the workflow
5. See activity. (Shows the date of an event, and a description of the event, such as file upload, move, and deletion.
6. Delete the workflow

In this section:

## Add a New Workflow



It is important to note that not all actions are compatible with all conditions. Please see the table on the page Define a THEN Action for compatible settings.

Administrators can add Workflows in the Admin Portal.

You will need to choose a condition, and specify what action should be taken when that condition occurs.

- [Define an IF Condition](#)
- [Define a THEN Action](#)

### To add a new workflow:

1. Open a browser and log into the Admin Portal.
2. On the left hand navigation panel, click **Workflows**.
3. On the top right, click the Add Workflow button.
4. In the Create New Workflow window, select an [IF Condition](#), and then click Next.
5. If a condition requires you to specify a value for something, for example a date or time, type in the values in the Required Parameters, and then click Next. Information about what is required is described below this box.
6. In the Create New Workflow window, select a [THEN Action](#), and then click Next.
7. If an Action requires you to specify a value for something, for example a date or time, type in the values in the Required Parameters, and then click Next. Information about what is required is described below this box.

8. In Workflow Name, type in a unique word or phrase that describes the workflow, and then click Finish.

## Create New Workflow ×

Name for this action

Workflow Name

← Previous

→ Finish

× Cancel

## Define an IF Condition



Beginning in version 23.253, FileCloud supports expressions, special conditions based on user and path owner properties.



The workflow **If a user's account is near its expiration date** is available in FileCloud 23.251 and later.



Not all actions are compatible with all conditions.

When you create a workflow, you must select a condition to act as a trigger.

- Depending on the trigger, additional parameters may be required.
- Once a Condition is selected, compatible Actions can be selected.

### Where do I set up the condition?

When you create a new Workflow, you will be able to select a condition.

Create New Workflow

Select the condition

IF Condition .. If a file is created

→ Next × Cancel

**Where do I add my parameters?**

After you select a Condition, then you can enter any parameters, such as a date or time.

If you need more information about what parameters are required, look below the Required Parameters box.

### Create New Workflow

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name":"value"
}
```

This condition will be triggered when a file is created.

#### Important Notes

**exclude:** When enabled, excludes matching the specified path from the action and performs the action for all that don't match the path.

#### Parameters

**parent\_folder\_path\_string (required)**  
Path of the folder as shown in the file browser.

**use\_regex (optional)**  
Specifies whether the path has a regex format.

**exclude (optional)**  
Exclude items matching the specified path/pattern from the action.

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

## Available Conditions

### Client App Conditions

**If any new client app connects**

**Create New Workflow**
✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition will be triggered the **first time** a client app connects to the server.

The client can be mobile app, drive app, sync app etc.

### Parameters

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

### Expression Support

You can use expressions to add complex conditions based on user properties:

#### User Context Variables

- \_user.groups** - User's group memberships
- \_user.policy** - User's assigned policy
- \_user.email** - User's email address
- \_user.username** - User's username

Workflow Condition	Parameters	Description
If any new client app connects	<b>No parameters required</b>	<p>This condition is triggered when an external (non-browser) client connects to FileCloud Server.</p> <p>For example, this condition will trigger for clients such as:</p> <ul style="list-style-type: none"> <li>FileCloudSync</li> <li>FileCloudDrive</li> <li>iOS</li> <li>Android App</li> </ul>

Available expression variables: **User Context variables.**

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

## File Conditions

### If a file is created

Create New Workflow
⊙

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition will be triggered when a file is created.

### Important Notes

**exclude:** When enabled, excludes matching the specified path from the action and performs the action for all that don't match the path.

### Parameters

**parent\_folder\_path\_string (required)**  
Path of the folder as shown in the file browser.

**use\_regex (optional)**  
Specifies whether the path has a regex format.

**exclude (optional)**  
Exclude items matching the specified path/pattern from the action.

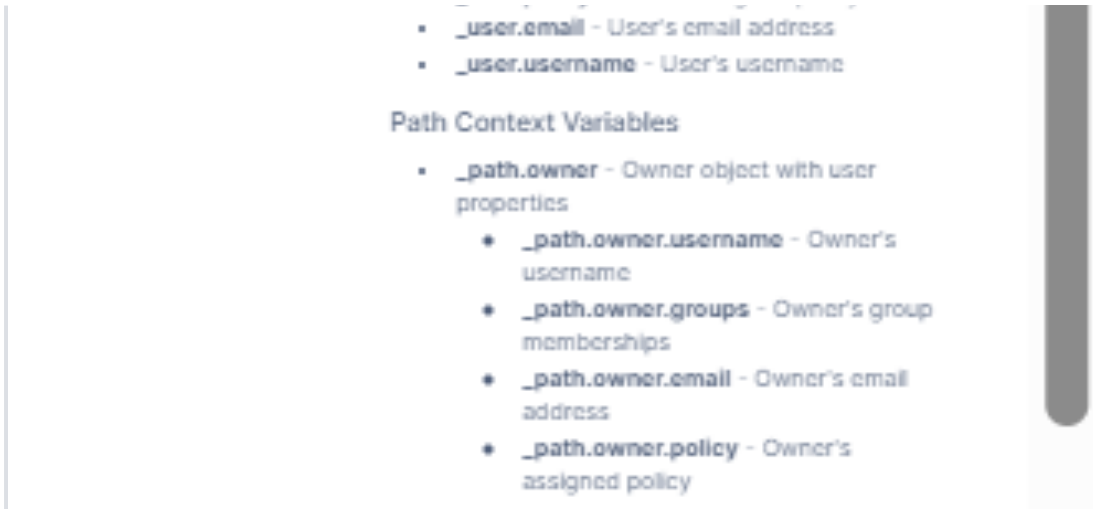
**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

### Expression Support

You can use expressions to add complex conditions based on user and path properties:

#### User Context Variables

- **\_user.groups** - User's group memberships
- **\_user.policy** - User's assigned policy



Workflow Condition	Parameters	Description
If a file is created	<pre>{   "parent_folder_path_string":"/   userid/   somepath",   "use_regex":"1",   "exclude":"1" }</pre>	<p>This condition will be triggered if a file is created via any means (Browser, Clients, etc.)</p> <p><b>parent_folder_path_string</b> - required as a parameter for this condition to trigger. If the condition needs to be triggered for all folders, then you can set it to be "/". For help specifying the path correctly, see <a href="#">Identifying a FileCloud Specific Path</a>.</p> <p><b>use_regex (optional)</b> - specifies how the folder path is validated.</p> <ul style="list-style-type: none"> <li>• 0 or unspecified = use an exact match for the parent folder path string</li> <li>• 1 = use a regular expression match for the parent folder path string</li> </ul> <p><b>exclude (optional)</b> - specifies the system should only perform the action on non-matching paths (do not perform the action on matching paths).</p>

Available expression variables: **User Context variables, Path Context variables.**

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

**If a file is updated**

Workflow Condition	Parameters	Description
--------------------	------------	-------------

If a file is updated.	<pre>{   "parent_folder_path_string":"/   userid/   somepath",   "use_regex":"1",   "exclude":"1" }</pre>	<p>This condition will be triggered if a file is updated.</p> <p><b>parent_folder_path_string</b> - required as a parameter for this condition to trigger. If the condition needs to be triggered for all folders, then you can set it to be "/". For help specifying the path correctly, see <a href="#">Identifying a FileCloud Specific Path</a>.</p> <p><b>use_regex (optional)</b> - specifies how the folder path is validated.</p> <ul style="list-style-type: none"> <li>• 0 or unspecified = use an exact match for the parent folder path string</li> <li>• 1 = use a regular expression match for the parent folder path string</li> </ul> <p><b>exclude (optional)</b> - specifies the system should only perform the action on non-matching paths (do not perform the action on matching paths).</p>
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Available expression variables: **User Context variables**, **Path Context variables**.

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

#### If a file is deleted

Workflow Condition	Parameters	Description
If a file is deleted	<pre>{   "parent_folder_path_string":"/   userid/   somepath",   "use_regex":"1",   "exclude":"1" }</pre>	<p>This condition will be triggered if a file is deleted.</p> <p><b>parent_folder_path_string</b> - required as a parameter for this condition to trigger. If the condition needs to be triggered for all folders, then you can set it to be "/". For help specifying the path correctly, see <a href="#">Identifying a FileCloud Specific Path</a>.</p> <p><b>use_regex (optional)</b> - specifies how the folder path is validated.</p> <ul style="list-style-type: none"> <li>• 0 or unspecified = use an exact match for the parent folder path string</li> <li>• 1 = use a regular expression match for the parent folder path string</li> </ul> <p><b>exclude (optional)</b> - specifies the system should only perform the action on non-matching paths (do not perform the action on matching paths).</p>

Available expression variables: **User Context variables**, **Path Context variables**.

For instructions on including expressions, see [Using Expressions in IF Conditions](#) Available expression variables: **User Context variables**, **Path Context variables**.

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

#### If file is downloaded

Workflow Condition	Parameters	Description

If a file is downloaded	<pre>{   "parent_folder_path_string":"/   userid/   somepath",   "use_regex":"1",   "exclude":"1" }</pre>	<p>This condition will be triggered if a file is downloaded</p> <p><b>parent_folder_path_string</b> - required as a parameter for this condition to trigger. If the condition needs to be triggered for all folders, then you can set it to be "/". For help specifying the path correctly, see Identifying a FileCloud Specific Path.</p> <p><b>use_regex (optional)</b> - specifies how the folder path is validated.</p> <ul style="list-style-type: none"> <li>• 0 or unspecified = use an exact match for the parent folder path string</li> <li>• 1 = use a regular expression match for the parent folder path string</li> </ul> <p><b>exclude (optional)</b> - specifies the system should only perform the action on non-matching paths (do not perform the action on matching paths).</p>
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Available expression variables: **User Context variables**, **Path Context variables**.

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

#### If a file is added or updated

Workflow Condition	Parameters	Description
If a file is added or updated	<pre>{   "parent_folder_path_string":"/   userid/   somepath",   "use_regex":"1",   "exclude":"1" }</pre>	<p>This condition will be triggered if a file is added or updated</p> <p><b>parent_folder_path_string</b> - required as a parameter for this condition to trigger. If the condition needs to be triggered for all folders, then you can set it to be "/". For help specifying the path correctly, see Identifying a FileCloud Specific Path.</p> <p><b>use_regex (optional)</b> - specifies how the folder path is validated.</p> <ul style="list-style-type: none"> <li>• 0 or unspecified = use an exact match for the parent folder path string</li> <li>• 1 = use a regular expression match for the parent folder path string</li> </ul> <p><b>exclude (optional)</b> - specifies the system should only perform the action on non-matching paths (do not perform the action on matching paths).</p>

Available expression variables: **User Context variables**, **Path Context variables**.

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

#### If file was not modified/created in specified days

**Create New Workflow**
✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition will be triggered if a file was last modified the specified days ago. The check will run once a day.

### Important Notes

**exclude:** When enabled, excludes matching the specified path from the action and performs the action for all that don't match the path.

**trigger\_date:** The **MODIFIED\_DATE** option is only applicable for files.

### Parameters

**parent\_folder\_path\_string (required)**  
Path of the folder as shown in the file browser.

**number\_of\_days (required)**  
Number of days since a file was modified.

**skip\_recently\_accessed (optional)**  
When TRUE, files viewed or downloaded within number\_of\_days will be treated as recently modified.

**exclude\_recyclebin (optional)**  
When TRUE, files on recycle bin path will not be considered.

**exclude (optional)**  
Exclude items matching the specified path/pattern from the action.

**trigger\_date (optional)**  
Defines which file date to use when evaluating the condition (BOTH, MODIFIED\_DATE, CREATED\_DATE).

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

Workflow Condition	Parameters	Description
--------------------	------------	-------------

<p>If a file was not modified/created in specified days</p>	<pre>{   "parent_folder_path_string": "/johndoe",   "number_of_days": 7,   "skip_recently_accessed": 1,   "exclude_recyclebin": 1,   "exclude": ".*secret.*" }</pre>	<p>This condition will be triggered if a file was not created [specified days] ago or has not been updated for [specified days].</p> <ul style="list-style-type: none"> <li>This is useful for removing old files that are no longer being used</li> <li>This check will run once a day</li> </ul> <p><b>parent_folder_path_string</b> - required as a parameter for this condition to trigger.</p> <ul style="list-style-type: none"> <li>If the condition needs to be triggered for all folders, then you can set it to be "/". For help specifying the path correctly, see <a href="#">Identifying a FileCloud Specific Path</a>.</li> <li>NOTE: ONLY Managed storage paths are supported for this condition.</li> </ul> <p><b>number_of_days</b> - required to specify the number of days before the current date that a file was last modified.</p> <ul style="list-style-type: none"> <li>This will be checked once a day and all files that match this condition will be subject to the THEN action you choose.</li> <li>For example, if you specify the number of days as 15, all files in the specified folder that have not been modified in the last 15 days will subject to the the THEN action you configure.</li> </ul> <p><b>skip_recently_accessed</b> - required to specify whether files that were viewed or downloaded during the number of days are considered modified. Default is <i>false</i>, viewed or downloaded files are not considered recently modified. When <i>true</i>, files viewed or downloaded within number_of_days are considered modified and will not be included in the <i>Then</i> action.</p> <p><b>exclude_recyclebin</b> - (added in FileCloud version 21.3) optional (default is false) When true, files in recycle bin are not considered.</p> <p><b>exclude</b> - (added in FileCloud version 22.1) optional - specifies the system should only perform the action on non-matching paths (do not perform the action on matching paths).</p> <p><b>trigger_date</b> - (added in FileCloud version 23.253) optional (default is BOTH) - specifies which field to use as the date the file was last modified. Use one of the following values:      BOTH - (default) Check if the CREATED_DATE and the MODIFIED_DATE are the specified number of days ago or more.      CREATED_DATE - Check if the CREATED_DATE is the specified number of days ago or more.      MODIFIED_DATE - Check if the MODIFIED_DATE is the specified number of days ago or more.</p>
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Available expression variables: **User Context variables.**

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

### If the file uploaded is bigger than the expected size

Create New Workflow
✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition will be triggered when an uploaded file is bigger than the expected size.

### Parameters

**size (required)**  
Size expected in MB.

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

Workflow Condition	Parameters	Description
If the file uploaded is bigger than expected size.	<pre>{   "size": "4" }</pre>	This condition will be triggered when an uploaded file is bigger than the size specified. <b>size</b> - specifies the maximum expected file size in MB.

Available expression variables: **User Context variables.**

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

#### If the file downloaded is bigger than the expected size

Workflow Condition	Parameters	Description
If the file downloaded is bigger than expected size.	<pre>{   "size": "4" }</pre>	This condition will be triggered when a downloaded file is bigger than the size specified. <b>size</b> - specifies the maximum expected file size in MB.

Available expression variables: **User Context variables.**

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

## Folder Conditions

### If a folder is created

Workflow Condition	Parameters	Description
If a folder is created	<pre>{   "parent_folder_path_string":"/userid/   somepath",   "use_regex":"1",   "exclude":"1" }</pre>	<p>This condition will be triggered when a folder is created in the system</p> <p><b>parent_folder_path_string</b> - required as a parameter for this condition to trigger. If the condition needs to be triggered for all folders, then you can set it to be "/". For help specifying the path correctly, see Identifying a FileCloud Specific Path.</p> <p><b>use_regex (optional)</b> - specifies whether system uses an exact match for the parent folder path string ("use_regex": "0" or missing) or whether to use a regular expression match ("use_regex":"1")</p> <p><b>exclude (optional)</b> - specifies the system should only perform the action on non-matching paths (do not perform the action on matching paths).</p>

Available expression variables: **User Context variables, Path Context variables.**

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

### If a folder is deleted

Workflow Condition	Parameters	Description
If a folder is deleted	<pre>{   "parent_folder_path_string":"/userid/   somepath",   "use_regex":"1",   "exclude":"1" }</pre>	<p>This condition will be triggered when a folder is deleted</p> <p><b>parent_folder_path_string</b> - required as a parameter for this condition to trigger. If the condition needs to be triggered for all folders, then you can set it to be "/". For help specifying the path correctly, see Identifying a FileCloud Specific Path.</p> <p><b>use_regex (optional)</b> - specifies whether system uses an exact match for the parent folder path string ("use_regex": "0" or missing) or whether to use a regular expression match ("use_regex":"1")</p> <p><b>exclude (optional)</b> - specifies the system should only perform the action on non-matching paths (do not perform the action on matching paths).</p>

Available expression variables: **User Context variables, Path Context variables.**

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

## User Account Conditions

### If a user's last login is older than...

### Create New Workflow

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition is triggered if a user's last login is older than specified days. This check will run based on the day interval configured.

#### Parameters

**last\_login\_days\_ago (required)**  
Number of days since last login.

**user\_account\_type (required)**  
Type of user account (USER\_ACCOUNT\_ANY, USER\_ACCOUNT\_FULL\_ACCESS, USER\_ACCOUNT\_GUEST\_ACCESS, USER\_ACCOUNT\_LIMITED\_ACCESS, USER\_ACCOUNT\_DISABLED).

**day\_interval (required)**  
Days interval (For daily operation, specify this value to be 1).

**skip\_users\_not\_logged\_in (optional)**  
Skip users who have never logged in to the system.

**skip\_admin\_users (optional)**  
Skip promoted admins. Default is true.

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

	Workflow Condition	Parameters	Description
If a user's last login is older than . ..	{	<pre> "last_login_days_ago": 30, "user_account_type": "USER_ACCOUNT_LIMITED_ACCESS", "day_interval": 1, "skip_users_not_logged_in": 1, "skip_admin_users": 0, "include_domain": "domain.com", "exclude_domain": "subdomain.domain.com,@otherdomain.com" } </pre> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p><i>For example, every five days to check for full access users who have not logged in for the last 30 days. Omit them from this check if they have never logged in or are promoted admins.</i></p> <pre> { "last_login_days_ago": 30, "user_account_type": "USER_ACCOUNT_FULL_ACCESS", "day_interval": 1, "skip_users_not_logged_in": 1, "skip_admin_users": 1, } </pre> </div>	<p>If a user's last login is older than the specified number of days, then the THEN condition you configure will be run.</p> <p><b>last_login_days_ago:</b> Number of days since last login.</p> <p><b>user_account_type</b> - type of account. You must use one of the following values:</p> <ul style="list-style-type: none"> <li>• USER_ACCOUNT_ANY</li> <li>• USER_ACCOUNT_FULL_ACCESS</li> <li>• USER_ACCOUNT_GUEST_ACCESS</li> <li>• USER_ACCOUNT_LIMITED_ACCESS (for external users)</li> <li>• USER_ACCOUNT_DISABLED</li> </ul> <p><b>day_interval</b> - the number of days between checks</p> <ul style="list-style-type: none"> <li>• For daily operation, specify a value of 1</li> </ul> <p><b>skip_users_not_logged_in</b> (optional): Skip users who have never logged in to the system. This enables you to only apply the action to users who are already using the system. Values are <b>true</b> and <b>false</b>.</p> <p><b>skip_admin_users</b> (added in FileCloud 23.251) Optional. Do not include promoted admins. 0 (default) - Include promoted admins 1 - Do not included promoted admins</p>

Available expression variables: **User Context variables.**

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

### If a new user is created

### Create New Workflow

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition will trigger the proper action depending on the security state of a created user.

#### Parameters

**auth\_type (optional)**  
Type of authentication (DEFAULT, ACTIVEDIRECTORY, LDAP).

**user\_access\_level (optional)**  
Account access level  
(USER\_ACCOUNT\_ANY\_ACCESS, USER\_ACCOUNT\_FULL\_ACCESS, USER\_ACCOUNT\_GUEST\_ACCESS, USER\_ACCOUNT\_LIMITED\_ACCESS). Default is "USER\_ACCOUNT\_ANY\_ACCESS".

**user\_login\_method (optional)**  
How user authenticates (LOGIN\_METHOD\_ANY, LOGIN\_METHOD\_DEFAULT, LOGIN\_METHOD\_SSO). Default is "LOGIN\_METHOD\_ANY".

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

Workflow Condition	Parameters	Description
If a new user is created ...	<i>None</i>	<p>When a new user account is created, the THEN action you configure will be triggered.</p> <p>Optional Parameters</p> <p><b>auth-type</b> - Type of authentication. This is <b>optional</b> and can be:</p> <ul style="list-style-type: none"> <li>• DEFAULT</li> <li>• ACTIVEDIRECTORY</li> <li>• LDAP</li> </ul> <p><b>user_access_level</b>: Account access level. This is <b>optional</b> and can be:</p> <ul style="list-style-type: none"> <li>• USER_ACCOUNT_ANY_ACCESS (default)</li> <li>• USER_ACCOUNT_FULL_ACCESS</li> <li>• USER_ACCOUNT_GUEST_ACCESS</li> <li>• USER_ACCOUNT_LIMITED_ACCESS (for external users)</li> </ul> <p><b>user_login_method</b>: How user authenticates. This is <b>optional</b> and can be:</p> <ul style="list-style-type: none"> <li>• LOGIN_METHOD_ANY (default)</li> <li>• LOGIN_METHOD_DEFAULT</li> <li>• LOGIN_METHOD_SSO</li> </ul>

Available expression variables: **User Context variables** (\_user.email, \_user.username)

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

**If a user's account is older than**

**Create New Workflow**
✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition is triggered when a user's account is older than the specified days. This is checked based on the day interval configured.

### Parameters

**days (required)**  
Number of days after account creation.

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

Workfl ow Condi on	Parameters	Description

<p>If a user's create date is older than</p> <p>Available in FileCloud Version 23.232</p>	<pre>{   "days": 30,   "include_domain": "contractor.com",   "exclude_domain": "subdomain.domain.com,@otherd omain.com" }</pre> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>For example, if a user's account was created more than 60 days ago and it is in the domain contractor.com</p> <pre>{   "days": 60,   "include_domain": "contractor.com", }</pre> </div>	<p>This condition is triggered when a user's create date is older than the number of days specified in <b>days</b>.</p> <p><b>Parameters</b></p> <p><b>days</b> - Required. When a user's create date is older than this number of days, the condition is triggered.</p>
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Available expression variables: **User Context variables**.

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

#### **If a user's account is near its expiration date**

### Create New Workflow ✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition will trigger if a user's account is nearing its expiration date, based on the number of days configured.

#### Parameters

**days\_to\_expiry (required)**  
Number of days before the account expires.

**days\_interval (optional)**  
Days interval to perform the check (For daily operation, specify this value to be 1). Default is 5.

**skip\_admin\_users (optional)**  
Skip promoted admins. Default is true.

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

Workflow Condition	Parameters	Description
If a user's account is near its expiration date	<pre data-bbox="359 409 726 600"> {   "days_to_expiry": 10,   "days_interval": 5,   "skip_admin_users": 1 } </pre> <p data-bbox="375 712 949 857">For example, When a user's account is set to expire in 15 days, perform an action such as sending the user an email. Send the email again every 5 days, but the last 5 days, send the email every day. Do not perform the action on promoted admins.</p> <pre data-bbox="375 873 758 1120"> {   "days_to_expiry": 15,   "days_interval": 5,   "skip_admin_users": 1 } </pre>	<p data-bbox="997 409 1348 465"><b>days_to_expiry</b> - Number of days before account expiration</p> <p data-bbox="997 477 1268 510"><b>days_interval</b> - (optional)</p> <p data-bbox="997 521 1348 689">At what interval to perform the action again after it is performed the first time. During the last interval, the action is performed every day. Default is 5 days. For example:</p> <ul data-bbox="1021 701 1316 813" style="list-style-type: none"> <li>• Action is "Send an email"</li> <li>• days_to_expiry = 15</li> <li>• days_interval = 5</li> </ul> <p data-bbox="997 824 1364 969">An email is sent at 15 days before account expiration, 10 days before account expiration and 5, 4, 3, 2, and 1 days before account expiration.</p> <p data-bbox="997 981 1380 1149"><b>skip_admin_users</b> Optional. Do not include promoted admins. 0 (default) - Include promoted admins 1 - Do not included promoted admins</p> <p data-bbox="997 1171 1157 1205"><b>Interval Logic</b></p> <p data-bbox="997 1216 1380 1272">During the last interval, the action is executed every day. For example:</p> <ul data-bbox="1021 1283 1300 1395" style="list-style-type: none"> <li>• Action: "Send an email"</li> <li>• days_to_expiry = 15</li> <li>• days_interval = 5</li> </ul> <p data-bbox="997 1406 1364 1552">An email is sent at 15 days before account expiration, 10 days before account expiration and 5, 4, 3, 2, and 1 days before account expiration.</p>

## Other Conditions

### If a comment is added

💡 Comments can be added to files and folders.

**Create New Workflow**
✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition will be triggered when a comment is added to a file or folder.

### Important Notes

**exclude:** When enabled, excludes matching the specified path from the action and performs the action for all that don't match the path.

### Parameters

**parent\_folder\_path\_string (required)**  
Path of the folder as shown in the file browser.

**use\_regex (optional)**  
Specifies whether the path has a regex format.

**exclude (optional)**  
Exclude items matching the specified path/pattern from the action.

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

Workflow Condition	Required Parameters	Description
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<p>If a comment is added</p>	<pre>{   "parent_folder_path_string":   "/userid/somepath",   "use_regex":"1",   "exclude":"1" }</pre> <p>Available expression variables: <b>User Context variables.</b> For instructions on including expressions, see <a href="#">Using Expressions in IF Conditions</a></p>	<p>This condition will be triggered when a comment is added</p> <p><b>parent_folder_path_string</b> - required as a parameter for this condition to trigger. If the condition needs to be triggered for all folders, then you can set it to be "/". For help specifying the path correctly, see <a href="#">Identifying a FileCloud Specific Path</a>.</p> <p><b>use_regex (optional)</b> - specifies whether system uses an exact match for the parent folder path string ("use_regex": "0" or missing) or whether to use a regular expression match ("use_regex":"1")</p> <p><b>exclude (optional)</b> - specifies the system should only perform the action on non-matching paths (do not perform the action on matching paths).</p>
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Available expression variables: **User Context variables, Path Context variables.**

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

### Perform an action periodically at specified time and interval

### Create New Workflow ✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition will be triggered when the current time matches the supplied time.

**day\_interval** : Days interval (For daily operation, specify this value to be 1)

**time\_string** : (OPTIONAL) Time in format H:i:s (If not specified, it will run at 00:00:00)

**start\_date** : (OPTIONAL) Start date in format yyyy-mm-dd (If not specified, it will start from today)

**end\_date** : (OPTIONAL) End date in format yyyy-mm-dd (If not specified, it will run indefinitely)

```
{
  "day_interval": 7,
  "time_string": "08:00:00",
  "start_date": "2020-01-01",
  "end_date": "2020-01-31"
}
```

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Workflow Condition	Parameters	Description
Perform an action periodically at specified time and interval	<pre>{   "time_string": "1   6:45:05",   "day_interval": "7   " }</pre>	<p>This condition will be triggered when the current time on the FileCloud Server matches the supplied time.</p> <p><b>day_interval</b> - number of days that passes after a THEN action before it is triggered again.</p> <ul style="list-style-type: none"> <li>• The THEN action you choose will be triggered every "day_interval" days.</li> <li>• If the "day_interval" is 1, it is done daily</li> </ul> <p><b>time_string</b> - the time of day when you want the THEN action triggered</p> <ul style="list-style-type: none"> <li>• The matching time includes the time zone</li> <li>• The time is specified in a 24-hour format of Hours, minutes, seconds</li> </ul> <p><b>start-date</b> - Date that FileCloud begins checking for the condition</p> <p><b>end-date</b> - Last date that FileCloud checks for the condition.</p>

Available expression variables: **None**.

#### Perform an action on the specified date

Create New Workflow ✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition will be triggered when the current date matches the supplied date and time.

**date\_string** : date and time in format yyyy-mm-dd H:i:s

```
{
  "date_string": "2020-01-11 16:45:05"
}
```

← Previous

→ Next

✕ Cancel

Workflow Condition	Parameters	Description
Perform an action on the specified date	<pre>{   "date_string": "2020-01-11" }</pre>	<p>When the date matches the supplied date and time, the THEN action you configure will be run.</p> <p><b>date_string</b> - date and time in a 24-hour format</p> <ul style="list-style-type: none"> <li>• yyyy-mm-dd H:i:s</li> </ul>

Available expression variables: **None.**

**Perform an action periodically**

Workflow Condition	Parameters	Description
Perform an action periodically	<b>None. The frequency depends on how you configure the cron or task scheduler frequency.</b>	<p>This requires you to set up one of the following:</p> <ul style="list-style-type: none"> <li>• cron job</li> <li>• task scheduler</li> </ul>

Available expression variables: **None**.

### If share has not been accessed for specified days

Create New Workflow
✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name":"value"
}
```

This condition will be triggered if a share has not been accessed for the specified number of days. The check will run once a day.

### Parameters

**number\_of\_days (required)**  
Number of days since a file was modified.

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

Workflow Condition	Parameters	Description
If a share has not been accessed for specified days	<pre>{   "share_permission":   ["PUBLIC", "PRIVATE"],   "number_of_days": "180", }</pre>	<p>This condition will be triggered when a shared file or folder has not been accessed for the specified number of days.</p> <ul style="list-style-type: none"> <li><b>NOTE: The only supported action is <i>Delete share</i>.</b></li> <li>This is useful for removing shared files that are no longer being used</li> <li>This check will run once a day</li> </ul> <p><b>number_of_days</b> - required to specify the number of days before the current date that a shared file was accessed.</p> <ul style="list-style-type: none"> <li>This will be checked once a day and all files that match this condition will be subject to the THEN action you choose.</li> <li>For example, if you specify the number of days as 15, all shared files or folders that have not been accessed in the last 15 days will subject to the the THEN action you configure.</li> </ul>

Available expression variables: **Share Context variables**.

For instructions on including expressions, see [Using Expressions in IF Conditions](#)

## Using Expressions in IF Conditions



Expressions are available in FileCloud beginning in version 23.253.

Many admin workflows allow you to set up custom conditions in workflows based on user, path owner, and share properties. These conditions (referred to as expressions) must be written in regular expression syntax. They greatly expand your ability to customize workflows.

For example, you can expand the IF statement in a workflow to check if a user is a member of a certain group or has a certain policy, or to check if a share is a folder or file share.

Specifically, the additional conditions available for you to include can be based on:

- the user's or the path owner's **group, policy, email (or domain), or name**
- the share owner's **group, policy, email (or domain), or name**, the type of share (**public or private**), and the type of item shared (**folder vs. file**).

The list of available expression variables for each workflow is shown in its wizard. You can view a list of all available variables in the tables under [Guide to expression variables and operators](#), below.

As an example, in the following workflow, which uses the IF condition **If a file is added or updated**, the user and path context variables are supported, but not the share context variables. Below the variables, the available regular expression operators and examples are listed.

### Create New Workflow

## Expression Support

You can use expressions to add complex conditions based on user and path properties:

#### User Context Variables

- **\_user.groups** - User's group memberships
- **\_user.policy** - User's assigned policy
- **\_user.email** - User's email address
- **\_user.username** - User's username

#### Path Context Variables

- **\_path.owner** - Owner object with user properties
  - **\_path.owner.username** - Owner's username
  - **\_path.owner.groups** - Owner's group memberships
  - **\_path.owner.email** - Owner's email address
  - **\_path.owner.policy** - Owner's assigned policy

#### Operators

- **==, !=** - Equality/Inequality
- **in, not in** - Membership
- **contains, starts with, ends with** - String matching
- **matches** - Pattern matching

#### Logical Operators

- **and, or, not**

#### Examples

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The examples help you use the proper syntax when adding conditions:

**Examples**

- **'Admin Group' in \_user.groups** - User must be in Admin Group
- **\_user.policy == 'AdminPolicy'** - User must have Admin Policy
- **'Admin' in \_path.owner.groups** - Path owner must be in Admin group
- **\_path.owner.policy == 'AdminPolicy'** - Path owner must have Admin policy
- **\_user.username == \_path.owner.username** - Current user is the path owner
- **\_path.owner.email ends with '@company.com'** - Owner must be from company domain
- **'Manager' in \_user.groups and \_path.owner.username != 'admin'** - Complex condition example

The variables available depend on the workflow, and not all workflows have variables available.

### To create an IF statement with an expression condition

The IF statement we are setting up in this example uses an expression to specify a user's group and policy. The IF statement requires that the user who added or updated a file must also be in the group **TeamMember** and have the policy **Staff**.

1. In the admin portal, go to the Workflows page, and click **Add Workflow**.
2. In the Create New Workflow dialog box, choose an IF condition.  
This example uses the condition **If a file is added or updated**.

3. Click **Next**.

- The only required parameter is **parent\_folder\_path\_string**, so begin by entering it into the **Required Parameters** box.

This example uses the Team Folder **estate documents**.

**Create New Workflow**

Required Parameters

```
{"parent_folder_path_string":"\\teamfolder\\estate documents"}
```

This condition will be triggered when a file is created or updated.

### Important Notes

**exclude:** When enabled, excludes matching the specified path from the action and performs the action for all that don't match the path.

### Parameters

**parent\_folder\_path\_string (required)**  
Path of the folder as shown in the file browser.

**use\_regex (optional)**  
Specifies whether the path has a regex format.

**exclude (optional)**

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Scroll down to **Expression Support** to see the supported context variables. In this case the user and path context variables are supported.

To specify the user's group and policy, use the variables **\_user.groups** and **user.policy**.

## Create New Workflow

### Expression Support

You can use expressions to add complex conditions based on user and path properties:

#### User Context Variables

- **\_user.groups** - User's group memberships
- **\_user.policy** - User's assigned policy
- **\_user.email** - User's email address
- **\_user.username** - User's username

#### Path Context Variables

- **\_path.owner** - Owner object with user properties
  - **\_path.owner.username** - Owner's username
  - **\_path.owner.groups** - Owner's group memberships
  - **\_path.owner.email** - Owner's email address
  - **\_path.owner.policy** - Owner's assigned policy

#### Operators

- **==, !=** - Equality/Inequality
- **in, not in** - Membership
- **contains, starts with, ends with** - String matching
- **matches** - Pattern matching

#### Logical Operators

- **and, or, not**

#### Examples

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5. Add the variables and values.

### Create New Workflow

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parent_folder_path_string":
  "/teamfolder/estate documents",
  "expression": "'TeamMember' in
_user.groups and _user.policy == 'Staff'"
}
```

This condition will be triggered when a file is created or updated.

#### Important Notes

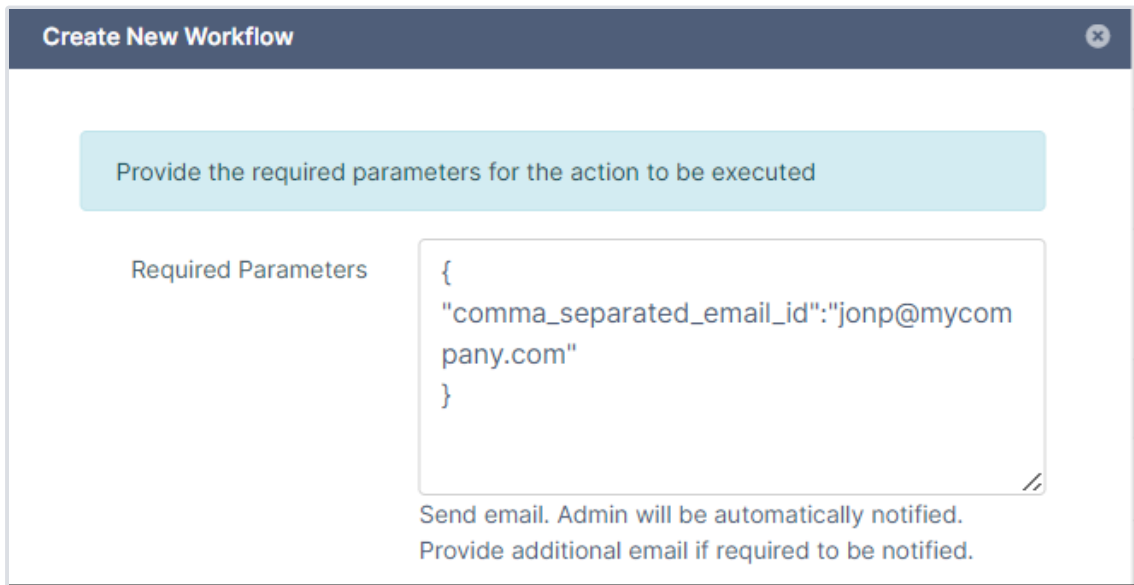
**exclude:** When enabled, excludes matching the specified path from the action and performs the action for all that don't match the path.

#### Parameters

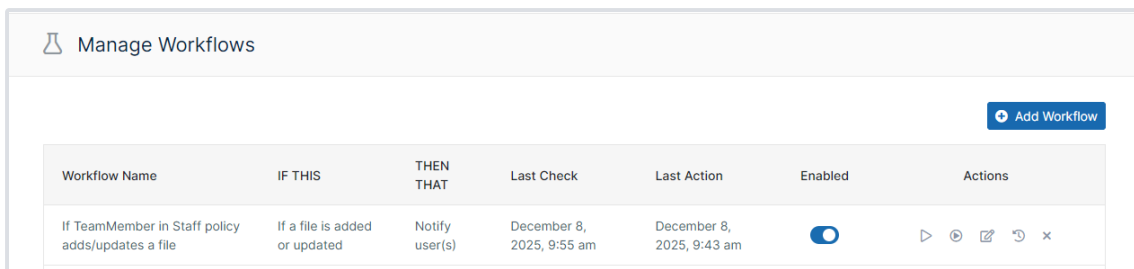
**parent\_folder\_path\_string (required)**  
Path of the folder as shown in the file browser.

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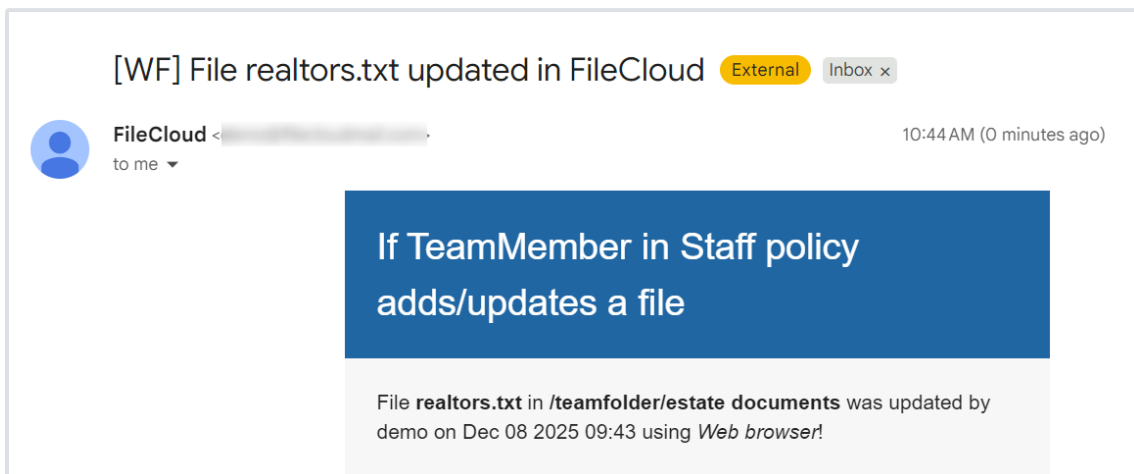
6. Click **Next**.
7. Choose the appropriate THEN action, and add the parameters.  
This example uses a THEN action that sends an email to a specific user, and specifies the user's email address.



8. Click **Next**, and enter a name for the workflow, then click **Finish**. The workflow is saved.



9. Test the workflow by having a user in the **TeamMember** group who has the policy **Staff** add or update a file in the Team Folder **estate documents**. The user specified will receive an email notification similar to the following one if the workflow is effective:



**Guide to expression variables and operators**

The tables below show the variables and operators supported in regular expressions when used with IF/THEN workflows in FileCloud. For examples using regular expression syntax with these variables and operators, see the wizard for adding each workflow.

<b>User Context Variables</b>	
_user.groups	User's groups
_user.policy	User's policy
_user.email	User's email address
_user.username	User's username
<b>Path Owner Context Variables</b>	
_path.owner.username	Path owner's username
_path.owner.groups	Path owner's groups
_path.owner.email	Path owner's email
_path.owner.policy	Path owner's policy
<b>Share Context Variables</b>	
_share.owner.username	Share owner's username
_share.owner.groups	Share owner's groups
_share.owner.email	Share owner's email
_share.owner.policy	Share owner's policy
_share.public	If share is public, true; if share is not public, false.
_share.private	If share is private, true; if share is not private, false.
_share.is_dir	If this is a folder share, true; if this is a file share, false.

Operators	
==, !=	equal/not equal
in, not in	is a member of/is not a member of
contains, starts with, ends with	string contains, string starts with, string ends with
matches	pattern matches

Logical Operators	
and	
or	
not	

## Define a THEN Action



Not all THEN actions are compatible with all IF conditions. Please see the table below for compatible settings.

Once you select an IF Condition, compatible THEN Actions can be selected.

- Actions are performed if the associated Condition is triggered.

Some Actions may require you to specify parameters, such as a specific date or time.

### Where do I set up the Action?

When you create a new Workflow, after you select a condition and specify parameters, then you can select an Action.

## Create New Workflow



Select the action to perform when the condition is triggered

THEN Action ..

Notify user(s)



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### Where do I add my parameters?

After you select an Action, then you can enter any parameters, such as a date or time.

If you need more information about what parameters are required, look below the Required Parameters box.

## Create New Workflow



Provide the required parameters for the action to be executed

Required Parameters

```
{  
  "parameter name": "value"  
}
```

Send email. Admin and user will be automatically notified. Provide additional email if required to be notified.

**comma\_separated\_email\_id:** Email ids in comma separated format as shown below

```
{  
  "comma_separated_email_id": "xyz@a.com,abc@b.com"  
}
```

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## THEN Actions

### Notifications

Action and		Details	Compatible IF conditions
Notify the user that the account may be deactivated soon	None	Notifies the user that the account may be disabled or deleted due to inactivity.	<p>Click to see If conditions</p> <p>If a user's last login is older than . . .</p> <p>If a new user is created</p> <p>If a user's create date is older than</p> <p>If a user's account is near its expiration date</p>
Notify user(s)	<pre>{ "comma_separated_email_id":"xyz@a.com,abc@b.com" , "comma_separated_group_name":"Group A,Group B" }</pre>	<p>Sends a notification to users matching the criteria and sends an email to the admin and the specified addresses with information about the users who were sent notifications.</p> <p><b>comma_separated_email_id</b> - email ids in comma separated format</p> <p><b>comma_separated_group_name:</b> Group names in comma separated format.</p>	<p>Click to see If conditions</p> <p>If a user's last login is older than . . .</p> <p>If a new user is created</p> <p>If a user's create date is older than</p> <p>If a user's account is near its expiration date</p> <p>If a new client app connects</p> <p>If a file is created</p> <p>If a file is updated</p> <p>If a file is deleted</p> <p>If a file is downloaded</p> <p>If a file was not modified for specified days</p> <p>If a file is added or updated</p> <p>If a file uploaded is bigger than expected size</p> <p>If a file downloaded is bigger than expected size</p> <p>If a folder is created</p>

Action and		Details	Compatible IF conditions
Send an email	<pre>{   "subject": "Subject of the email",   "body": "Body of the email in &lt;b&gt;HTML&lt;/b&gt; format.",   "is_html": 1,   "users": "user1,user2",   "groups": "group1,group2",   "notify": 0 }</pre>	<p>Sends a customized email to the users and/or groups indicated</p> <p><b>subject</b> - Subject of the email</p> <p><b>body</b> - Body of the email</p> <p><b>is_html</b> (optional) - 1 if the body is in HTML format; 0 if the body is in plain text format. Default is 0.</p> <p><b>Note:</b> If <b>is_html=1</b>, HTML tags are interpreted and the body of the email is formatted. For example, you can insert <b>&lt;b&gt;&lt;/b&gt;</b> tags to make text bold.</p> <p><b>users</b> (optional) - Comma separated list of users to send the email to.</p> <p><b>groups</b> (optional) - Comma separated list of groups to send the email to.</p> <p><b>notify</b> (optional) - 1 to automatically send the email to users impacted by the related action; 0 to not automatically send them the email. Default is 0.</p> <p>If no users or groups are specified, the email is sent to the admin.</p>	<p>Click to see if conditions</p> <p>If a file is created</p> <p>If a folder is created</p> <p>If a file is updated</p> <p>If a file is deleted</p> <p>If a folder is deleted</p> <p>If a file is downloaded</p> <p>If a comment is added</p> <p>If a file was not modified for specified days</p> <p>If a file is added or updated</p> <p>If the file uploaded is bigger than the expected size</p> <p>If the file uploaded is bigger than the expected size</p> <p>Perform an action periodically at specified time and interval</p> <p>Perform an action on the specified date</p> <p>Perform an action periodically</p> <p>If a new user is created</p> <p>If a user's account is older than</p> <p>If a user's last login is older than</p> <p>If a user's account is near its expiration date</p>

## File actions

Action	Parameters	Details	Compatible IF conditions
Copy the file(s) to some location	<pre>{   "target_path": "/usera/   folderb/",   "allow_overwrite": 1,   "keep_folder_structure": 1 }</pre>	<p>Copies files.</p> <p><b>target_path</b> - path to copy the file to.</p> <ul style="list-style-type: none"> <li>This path must be in the same storage type</li> <li>Files cannot be copied from managed storage to network shares or vice versa.</li> </ul> <p><b>allow_overwrite</b> - (Added in FileCloud 20.1) Optional. Allow file to overwrite existing files with the same name in the target path. If allow_overwrite is not included, overwrites are allowed.</p> <p><b>keep_folder_structure</b> (Optional): Keep folder structure while copying files. Valid values are 0 (do not keep folder structure) or 1 (keep folder structure). Default is 0 if not provided.</p> <p>The placeholders. %who, %when, %path, %how, %filename are available for this action.</p>	<p>Click to see If conditions</p> <p>If a file is created</p> <p>If a file is updated</p> <p>If a file is deleted</p> <p>If a file is downloaded</p> <p>If a file was not modified for specified days</p> <p>If a file is added or updated</p> <p>If a file uploaded is bigger than expected size</p> <p>If a file downloaded is bigger than expected size</p> <p>If a folder is created</p> <p>If a folder is deleted</p> <p>If a comment is added</p>

Action	Parameters	Details	Compatible IF conditions
Delete the file(s)	<pre>{   "delete_empty_folders":1,   "notify_owner":0,   "comma_separated_email_id":"email1@email.com,email2@email.com",   "comma_separated_group_name":"Group A,Group B" }</pre>	<p>Deletes matching files.</p> <p><b>delete_empty_folders (Optional):</b> When files are deleted, delete the parent folder as well if it is empty.</p> <p><b>notify_owner (Optional):</b> When the files are deleted, send an email to the owners.</p> <p><b>comma_separated_email_id (Optional):</b> Email ids in comma separated format.</p> <p><b>comma_separated_group_name (Optional):</b> Group names in comma separated format.</p>	<p>Click to see If conditions</p> <p>If a file is created</p> <p>If a file is updated</p> <p>If a file is deleted</p> <p>If a file is downloaded</p> <p>If a file was not modified for specified days</p> <p>If a file is added or updated</p> <p>If a file uploaded is bigger than expected size</p> <p>If a file downloaded is bigger than expected size</p> <p>If a folder is created</p> <p>If a folder is deleted</p> <p>If a comment is added</p>

Action	Parameters	Details	Compatible IF conditions
Move the file(s) to some location	<pre>{   "target_path": "/usera/   folderb/",   "allow_overwrite": 1,   "keep_folder_structure": 1 }</pre>	<p>Moves files.</p> <p><b>target_path</b> - Path to the new file location (where it should be moved).</p> <ul style="list-style-type: none"> <li>This path must be in the same storage type</li> <li>Files cannot be moved from managed storage to network shares or vice versa.</li> </ul> <p><b>allow_overwrite</b> - (Added in FileCloud 20.1) Optional. Allow file to overwrite existing files with the same name in the target path. If allow_overwrite is not included, overwrites are allowed.</p> <p><b>keep_folder_structure</b> (Optional): Keep folder structure while moving files. Valid values are 0 (do not keep folder structure) or 1 (keep folder structure). Default is 0 if not provided.</p> <p>The placeholders. %who, %when, %path, %how, %filename are available for this action.</p>	<p>Click to see If conditions</p> <p>If a file is created</p> <p>If a file is updated</p> <p>If a file is deleted</p> <p>If a file is downloaded</p> <p>If a file was not modified for specified days</p> <p>If a file is added or updated</p> <p>If a file uploaded is bigger than expected size</p> <p>If a file downloaded is bigger than expected size</p> <p>If a folder is deleted</p> <p>If a comment is added</p>
Release locks (added in FileCloud 22.1)	<pre>{   "days": 7 }</pre>	<p>Releases locks on files and folders.</p> <p><b>days</b> - Number of days after a lock was created on a file or folder to release it.</p>	<p>Click to see if conditions</p> <p>Perform an action periodically at specified time and interval</p> <p>Perform an action on the specified date</p> <p>Perform an action periodically</p> <p>If a user's create date is older than</p>

Action	Parameters	Details	Compatible IF conditions
Verify file integrity and generate admin alert on mismatch	{ "ignore_file_size_in_mb": 10 }	<p>Attempts to identify the file type based on its content and checks if it matches the extension.</p> <ul style="list-style-type: none"> <li>If the file type does not match, then generate admin portal alert.</li> </ul> <p>Optional</p> <p><b>ignore_file_size_in_mb:</b> - Do not scan files larger than this limit specified in megabytes.</p> <p><b>Note:</b> By default, plain text files must have the extension txt, dat, log or csv to pass the integrity check.</p>	<p>Click to see If conditions</p> <p>If a file is created</p> <p>If a file is updated</p> <p>If a file is deleted</p> <p>If a file is downloaded</p> <p>If a file was not modified for specified days</p> <p>If a file is added or updated</p> <p>If a file uploaded is bigger than expected size</p> <p>If a file downloaded is bigger than expected size</p> <p>If a folder is created</p> <p>If a folder is deleted</p> <p>If a comment is added</p>
Verify file integrity and delete on mismatch	{ "ignore_file_size_in_mb": 10 }	<p>Attempts to identify file type based on its content and checks if it matches its mime type.</p> <ul style="list-style-type: none"> <li>A MIME type is a string identifier composed of two parts: a "type" and a "subtype".</li> <li>If the file type does not match, then <ul style="list-style-type: none"> <li>the latest version is deleted</li> <li>users listed in the parameter are notified</li> </ul> </li> </ul> <p>Optional</p> <p><b>ignore_file_size_in_mb:</b> - Do not scan files larger than this limit specified in megabytes.</p> <p><b>Note:</b> By default, plain text files must have the extension txt, dat, log or csv to pass the integrity check.</p>	<p>Click to see If conditions</p> <p>If a file is created</p> <p>If a file is updated</p> <p>If a file is deleted</p> <p>If a file is downloaded</p> <p>If a file was not modified for specified days</p> <p>If a file is added or updated</p> <p>If a file uploaded is bigger than expected size</p> <p>If a file downloaded is bigger than expected size</p> <p>If a folder is created</p> <p>If a folder is deleted</p> <p>If a comment is added</p>

## Reporting

Action	Parameters	Details	Compatible IF conditions
Run a report	<pre>{ "report_name": "my_report", "comma_separated_email_id": "a@x.com,b@y.com", "comma_separated_group_name": "Group A,Group B" }</pre>	<p>Opens a saved report, runs it, and then sends the results in email.</p> <p>💡 This action requires you to have already created the report from the Admin dashboard.</p> <p>Create a Custom Report</p> <p><b>report_name:</b> Name of the report to run. The report must already be created in the reports section and that exact report name must be provided here.</p> <p><b>comma_separated_email_id:</b> Comma separated email ids to be notified after report is run</p> <p><b>comma_separated_group_name (Optional):</b> Group names in comma separated format.</p>	<p>Click to see If conditions</p> <p>If a file is created</p> <p>If a file is updated</p> <p>If a file is deleted</p> <p>If a file is downloaded</p> <p>If a file was not modified for specified days</p> <p>If a file is added or updated</p> <p>If a file uploaded is bigger than expected size</p> <p>If a file downloaded is bigger than expected size</p> <p>If a folder is created</p> <p>If a folder is deleted</p> <p>If a user's last login is older than . . .</p> <p>If a new user is created</p> <p>If a user's create date is older than</p> <p>If a user's account is near its expiration date</p> <p>If a comment is added</p> <p>Perform an action periodically at specified time and interval</p> <p>Perform an action on the specified date</p> <p>Perform an action periodically</p>

Action	Parameters	Details	Compatible IF conditions
Generate an email report	<pre>{   "comma_separated_email_id": "xyz@a.com,abc@b.com"   ,   "comma_separated_group_name": "Group A,Group B" }</pre>	<p>Sends an email to the specified addresses with information about the users matching the criteria.</p> <p><b>comma_separated_email_id</b> - email ids in comma separated format</p> <p><b>comma_separated_group_name:</b> Group names in comma separated format.</p>	<p>Click to see If conditions</p> <p>If a user's last login is older than . . .</p> <p>If a new user is created (if the user account was created by the user; not applicable if the user account was created by an admin)</p> <p>If a user's create date is older than</p> <p>If a user's account is near its expiration date</p>

## Modifying users

Action	Parameters	Details	Compatible IF conditions
Disable user account	<pre>{   "comma_separated_email_id": "xyz@a.com,abc@b.com"   ,   "comma_separated_group_name": "Group A,Group B",   "donot_email_user": 0 }</pre>	<p>Disables the user account and then sends an email with information about the action performed.</p> <p><b>comma_separated_email_id</b> - email IDs in comma separated format</p> <p><b>comma_separated_group_name:</b> Group names in comma separated format.</p> <p><b>donot_email_user (optional):</b> Do not send email to the user affected (1 or 0). Default 0.</p> <p><b>Note:</b> To customize the email sent to the user, go to Customization &gt; Email Templates and edit the template <b>Workflow Auto Disable Account Email Template</b>.</p>	<p>Click to see If conditions</p> <p>If a user's last login is older than . . .</p> <p>If a new user is created</p> <p>If a user's create date is older than</p> <p>If a user's account is near its expiration date</p>

Action	Parameters	Details	Compatible IF conditions
Delete user account	<pre>{   "comma_separated_email_id": "xyz@a.com,abc@b.com"   ,   "comma_separated_group_name": "Group A,Group B",   "donot_email_user": 0 }</pre>	<p>Deletes the user account and then sends an email with information about the action performed.</p> <p><b>comma_separated_email_id</b> - email IDs in comma separated format</p> <p><b>comma_separated_group_name:</b> Group names in comma separated format.</p> <p><b>donot_email_user (optional):</b> Do not send email to user affected (1 or 0). Default 0.</p>	<p>Click to see If conditions</p> <p>If a user's last login is older than . . .</p> <p>If a new user is created</p> <p>If a user's create date is older than</p> <p>If a user's account is near its expiration date</p>
Change user status	<pre>{   "user_status":   "USER_ACCOUNT_LIMITED_ACCESS",   "mark_as_verified": 0,   "comma_separated_email_id":   "xyz@a.com,abc@b.com",   "comma_separated_group_name": "Group A,Group B",   "donot_email_user": 0 }</pre>	<p><b>user_account_type</b> - type of account. You must use one of the following values:</p> <ul style="list-style-type: none"> <li>• USER_ACCOUNT_DISABLED_ACCESS</li> <li>• USER_ACCOUNT_FULL_ACCESS</li> <li>• USER_ACCOUNT_GUEST_ACCESS</li> <li>• USER_ACCOUNT_LIMITED_ACCESS (external access)</li> </ul> <p><b>mark_as_verified (optional)</b> - marks the account as verified, so that the user can log in immediately without waiting for the admin to send the verification email.</p> <p><b>comma_separated_email_id</b> - email IDs in comma separated format</p> <p><b>comma_separated_group_name:</b> Group names in comma separated format.</p> <p><b>donot_email_user (optional)</b> - prevents an email from being sent to the user affected when the status is changed</p> <ul style="list-style-type: none"> <li>• 1 = Does not send an email</li> <li>• 0 = Sends an email</li> <li>• If nothing is specified, the default is 0</li> </ul>	<p>Click to see If conditions</p> <p>If a user's last login is older than . . .</p> <p>If a new user is created</p> <p>If a user's create date is older than</p> <p>If a user's account is near its expiration date</p>

Action	Parameters	Details	Compatible IF conditions
Set user group	<pre>{ "group_name":"Group1,Group2" }</pre>	<p>Assigns user to groups.</p> <p><b>group_name</b> - Comma separated list of groups to assign user to.</p>	<p>If a new user is created</p> <p>If a user's create date is older than</p> <p>If a user's account is near its expiration date</p>
Set user policy	<pre>{ "policy_name":"SamplePolicyName", "comma_separated_email_id": "", "comma_separated_group_name": "Group A,Group B", "donot_email_user": 0 }</pre>	<p>Sends an email notification to the listed users that the user's policy was set as the specified policy</p> <p><b>policy_name</b> - Name of policy to set</p> <p><b>comma_separated_email_id</b> - email ids in comma separated format</p> <p><b>comma_separated_group_name</b>: Group names in comma separated format.</p> <p><b>donot_email_user</b>  <b>0</b> (default) send the emails  <b>1</b> do not send the emails</p>	<p>If a user's last login is older than . . .</p> <p>If a new user is created</p> <p>If a user's create date is older than</p> <p>If a user's account is near its expiration date</p>
Set user properties	<pre>{ "policy_name":"SamplePolicyName", "user_status":"USER_ACCOUNT_LIMITED_ACCESS", "comma_separated_email_id": "", "comma_separated_group_name": "Group A,Group B", "donot_email_user": 0 }</pre>	<p>Sends an email notification to the listed users that the user's policy was set as specified and the user access was set as specified</p> <p><b>policy_name</b>: Name of policy to set.</p> <p><b>user_status (optional)</b>: User status to set.  (USER_ACCOUNT_FULL_ACCESS, USER_ACCOUNT_GUEST_ACCESS, USER_ACCOUNT_LIMITED_ACCESS (external access))</p> <p><b>comma_separated_email_id (optional)</b>: Comma separated emails to notify of workflow action.</p> <p><b>comma_separated_group_name (Optional)</b>: Group names in comma separated format.</p> <p><b>donot_email_user (optional)</b>: Set to 1 to prevent system from notifying user.</p>	<p>If a user's last login is older than . . .</p> <p>If a new user is created</p> <p>If a user's create date is older than</p> <p>If a user's account is near its expiration date</p>

## Share actions

Action	Parameters	Details	Compatible IF conditions
Delete the share(s)	None	Delete the share.	Click to see If conditions If a share has not been accessed for specified days

## Device actions

Action	Parameters	Details	Compatible IF conditions
Block the device for admin approval	None	Blocks the device and marks it with "Needs Approval" on the Manage Devices screen	Click to see If conditions If a new client app connects


## Edit a Workflow



It is important to note that not all actions are compatible with all conditions and it is up to the user to determine and set up correct workflows.

Administrators can edit workflows to change the name or parameters of the conditions and action.

To edit, click on the Edit button; to delete, click on the Delete button.

 **Manage Workflows**

Workflow [+ Add Workflow](#)

Workflow Name	IF THIS	THEN THAT	Last Check	Last Action	Enabled	Actions
Not Modified Run Report	If file was not modified for specified days	Run a report	January 19, 2023, 3:06 pm	Never		<a href="#">▶</a> <a href="#">⌂</a> <a href="#">✎</a> <a href="#">↺</a> <a href="#">✖</a>
Delete on bad integrity	If a file is created	Verify file integrity and delete on mismatch	January 19, 2023, 3:06 pm	December 14, 2022, 10:18 am		<a href="#">▶</a> <a href="#">⌂</a> <a href="#">✎</a> <a href="#">↺</a> <a href="#">✖</a>
Check file integrity	If a file is created	Verify file integrity and generate admin alert on mismatch	June 20, 2022, 9:12 am	June 20, 2022, 9:12 am		<a href="#">▶</a> <a href="#">⌂</a> <a href="#">✎</a> <a href="#">↺</a> <a href="#">✖</a>

**Update Workflow**
✕

Workflow Name

IF Condition .. If file was not modified for specified days ▼

Required Parameters 

```
{
  "parent_folder_path_string": "\jennifer",
  "number_of_days": 7,
  "skip_recently_accessed": true,
  "exclude_recyclebin": true,
  "exclude": ".*secret.*"
}
```

THEN Action .. Run a report ▼

Required Parameters 

```
{
  "report_name": "my_report",
  "comma_separated_email_id": "jennifer@example.com"
}
```

➔
▶ Execute
🔒 Update
✕ Cancel

## Run a Workflow

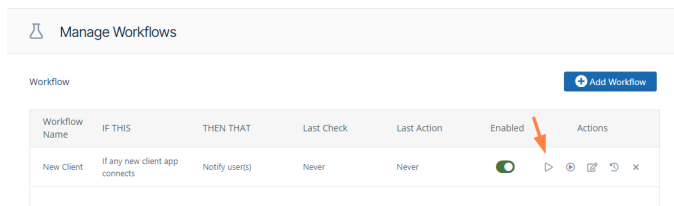


It is important to note that not all actions are compatible with all conditions and it is up to the user to determine and setup correct workflows.

Administrators can run a workflow manually from the **Manage Workflows** screen.

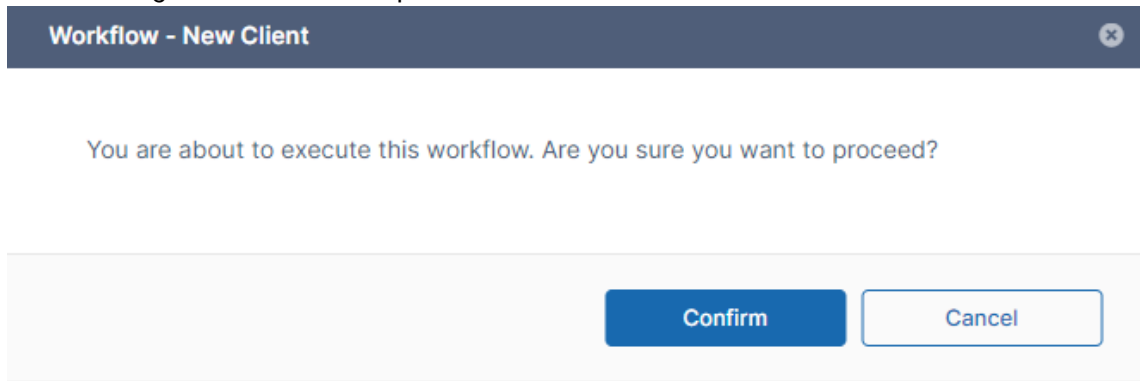
### To run a workflow manually:

1. In the FileCloud admin portal's navigation panel, click **Workflows**.
2. In the Manage Workflows screen, in the row for the workflow you want to run, click the first arrow under **Actions**.



Workflow Name	IF THIS	THEN THAT	Last Check	Last Action	Enabled	Actions
New Client	If any new client app connects	Notify user(s)	Never	Never	<input checked="" type="checkbox"/>	

The following confirmation box opens.



**Workflow - New Client**

You are about to execute this workflow. Are you sure you want to proceed?

**Confirm** **Cancel**

3. Click **Confirm**.

A screen notification confirms that the workflow ran successfully.

## Set Advanced Workflow Options



It is important to note that not all actions are compatible with all conditions and it is up to the user to determine and setup correct workflows.

Administrators can create and run more advanced scenarios., such as:

- regular expression in path matching
- the ability to pass additional, runtime-resolved data between conditions and actions

## What scenario do you want to use?

### Regular Expressions and Path Matching

You can enable regular expression matching in workflows by setting the **use\_regex** parameter to "1" in the condition definition. This is an optional parameter and by default is "0" (don't use regular expressions - use strict match instead). If regular expressions are enabled you must provide a valid regular expression pattern as the **parent\_folder\_path\_string** value. This pattern is used in the condition resolution process to find all matching paths (files / folders).

Regular expressions are supported by the following workflow conditions:

- if a file is created

- if a folder is created
- if a file is updated
- if a file is deleted
- if a folder is deleted
- if a file is downloaded
- if a comment is added
- if a file is added or updated

## Parameters definition - example

### Strict match

```
{
  "parent_folder_path_string":"/userid/somepath",
}
```

or

```
{
  "parent_folder_path_string":"/userid/somepath",
  "use_regex":"0"
}
```

### Regular expression

```
{
  "parent_folder_path_string":"/userid/somepath",
  "use_regex":"1"
}
```

## Usage - Example

For simplicity sake assume that Administrator wants to send email notifications whenever someone downloads a file from a given location. The following example shows the difference between *strict match* and *regular expression match*

### Strict match

Parameters are defined as follows:

```
{
  "parent_folder_path_string":"/userA/downloads",
}
```

For such defined condition action will be triggered whenever a files is downloaded directly from the "/userA/downloads" directory and only from this one.

### Regular expression

In this case the definition might look something like:

```
{
"parent_folder_path_string": "~/.*/downloads~",
"use_regex": "1"
}
```

For this condition action will be triggered for **all** directories that match the /user/download format, i.e. /userA/downloads, /userB/downloads, etc. This is a huge change that enables Administrators to define much more universal workflow scenarios.



#### Important

**Regular expression patterns aren't validated for correctness. Please double check them, especially when dealing with the data-changing actions (i.e. delete files / move files, etc.).**



#### RegEx Patterns

Regular expression definition has to start and end with one of the following characters:

'/', '~', '@', ',', '%', ''

We strongly advise against the / usage as it adds confusion to the pattern definition.

### Reversed Path Matching

The **Exclude** parameter enables the "reversed" path matching. That means that the specified action will be triggered for all files / folders whose path **doesn't match**. It's another huge change that allows administrators to define a new set of workflow. This is a very flexible and powerful feature, especially when combined with regular expressions.

Exclude parameter is supported by the following conditions:

- if a file is created

- if a folder is created
- if a file is updated
- if a file is deleted
- if a folder is deleted
- if a file is downloaded
- if a comment is added
- if a file is added or updated

### Example

Administrator wants to delete all files that were downloaded from the FileCloud, but wants to keep files in one particular location - /userA/prevented. Condition should be then defined as:

```
{
"parent_folder_path_string":"/userA/prevented",
"exclude":"1"
}
```

The match condition will be reversed, so action will be triggered for all files, except the ones located in this particular directory.



#### **Regular Expressions**

For a regular expression it is very important to understand that if it is invalid it will return a **NOT MATCH** result for all paths. Administrators have to be very careful when using exclude parameter with regular expressions, especially for a data sensitive operations.

### **Runtime Resolved Parameters**

Runtime resolved parameters are available in Workflows.

The runtime resolved parameters can be specified in the following IF conditions:

- if a file is created
- if a folder is created
- if a file is updated
- if a file is deleted
- if a folder is deleted
- if a file is downloaded
- if a comment is added
- if a file is added or updated
- if the file updated is bigger than the expected size
- if the file downloaded is bigger than the expected size

and then used in all compatible THEN actions.

Currently FileCloud supports the following placeholders only for file/folder related conditions.

- **%who** - user who performed the action that triggered the condition (for example, file upload or download)
- **%when** - time of the action
- **%path** - path of the file/folder
- **%how** - user agent of the performed action (for example, a browser type)
- **%filename** - name of the file

If the selected IF condition is able to implement runtime resolved parameters they are listed in the THEN action dialog box.

Create New Workflow ✕

Provide the required parameters for the action to be executed

Required Parameters

```
{  
  "parameter name":"value"  
}
```

Execute commandline. Do not use to run scripts with long execution times.  
**command\_line**: Command line syntax to be executed.  
Admin will be notified after the command is run

```
{  
  "command_line":"rm -rf /tmp/scratch"  
}
```

Following placeholders are available for this action:  
*%who, %when, %path, %how, %filename*

← Previous → Next ✕ Cancel

**Example - how condition resolves parameters**

Assume that **user1** downloaded a file **file1.pdf** from the **/user1/test** folder through a **Firefox** browser on **4pm** on the **01.01.2018**.

Condition will resolve all the parameters and pass it to the action:

- **%who** - user1
- **%when** - 2018-01-01 16:00:00
- **%path** - /user1/test/file1.pdf
- **%how** - Web browser
- **%filename** - file1.pdf

**Recommended usage**

Although it is possible to use resolved parameters in all compatible actions, this feature was designed and implemented mainly for the **command execution** action.

## Workflow Recipes for FileCloud

You can create custom workflows to perform a variety of actions.

Workflows operate using the following model:

- IF CONDITION - THEN ACTION (IFTTT)

Since there are many different ways to create custom workflows, this page provides you with some simple recipes to create a specific workflow.

- Using some of these recipes will help you learn how a workflow functions
- After using some recipes you should be able to understand how to create your own workflows

### In this section:

#### Admin Approval Required Workflow

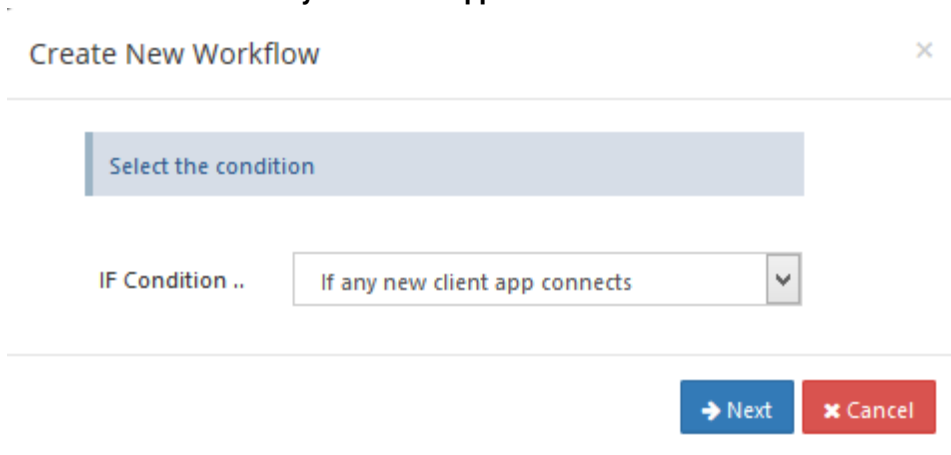
This workflow recipe blocks the connection of a new app or device until it is approved by an administrator.

- When a new app or device tries to connect to FileCloud, the action is unblocked **ONLY** after admin approval.
- In the Admin Portal, you can see the devices in **BLOCKED** status, awaiting **ADMIN** approval.

#### To create a workflow that requires admin approval for all clients:

1. Login to Admin Portal

2. Navigate to Workflow on the left navigation
3. Tap on the Add Workflow button
4. Set the If Condition "**If any new client app connects**"



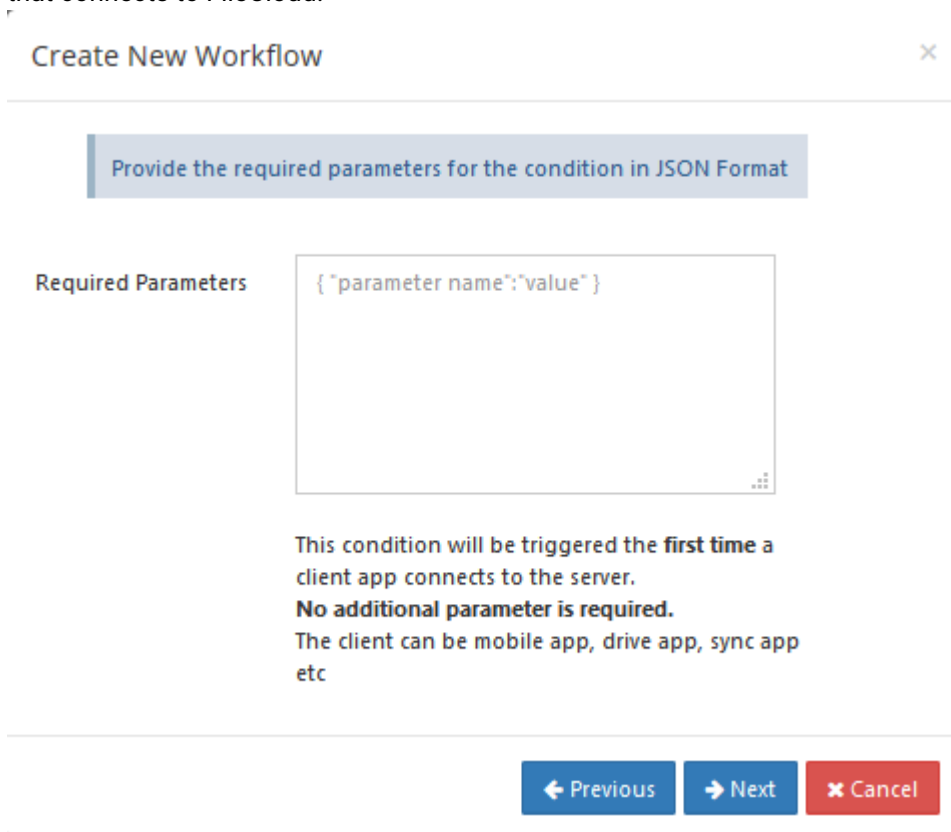
Create New Workflow

Select the condition

IF Condition .. If any new client app connects

Next Cancel

5. Click Next, no required parameters are to be given as ,the condition triggers for any client app that connects to FileCloud.



Create New Workflow

Provide the required parameters for the condition in JSON Format

Required Parameters { "parameter name": "value" }

This condition will be triggered the **first time** a client app connects to the server.  
**No additional parameter is required.**  
The client can be mobile app, drive app, sync app etc

Previous Next Cancel

6. Click Next, to give the THEN action

### Create New Workflow ✕

Select the action to perform when the condition is triggered

THEN Action ..  ▼

[← Previous](#) [→ Next](#) [✕ Cancel](#)

7. Click on Next, No parameters are required for this action

### Create New Workflow ✕

Provide the required parameters for the action to be executed

Required Parameters

Block the device and require admin to approve the device.  
**No parameters are required for this action.**

[← Previous](#) [→ Next](#) [✕ Cancel](#)

8. Click on Next, to give workflow name

### Create New Workflow ✕

---

Name for this action

**Workflow Name**

---

← Previous
→ Finish
✕ Cancel

- In the admin dashboard, the Devices tab will show the status of the devices awaiting Admin approval. The Admin is also sent an email.

Health	Type	User name	Device Name	Device Details	Last Access	Status	Access	Action	Logs
<span style="color: green;">●</span>		jessicam	FileCloud Drive (DESKTOP-N71N3EH)	App version: 21.1.0.5863 OS: Windows 10 - 10.0 (Build 19042)	Today at 10:20 AM from 127.0.0.1	Needs Admin Approval	Blocked	1	

- An email will be sent to the user trying to connect to FileCloud notifying the user that the device needs to be approved by the admin.

[WF] NewClient:Client app in FileCloud Drive (DESKTOP-N71N3EH) of user jessicam blocked for approval! Inbox x



**FileCloud**  
to me ▾

11:20 AM (11 minutes ago)



fileCloud

## Device approval required

The following app in device

**FileCloud Drive (DESKTOP-N71N3EH) [Windows 10 , 21.1.0.5863]**

associated with user account **jessicam** is blocked pending admin approval

You received this message because you have an account at FileCloud.  
Powered by [FileCloud](#)

## Create Report and Send Email Workflow

This workflow recipe creates a specific report and sends the result to specified emails once a day.

- The email can be configured to be sent at a specific time in the day, and the day interval can be set to daily.

**To create a workflow that generates a specific report and sends the result to specified emails:**

1. Log in to the admin portal
2. In the navigation panel, click **Reports**.
3. Click **Add Report**.
4. In **Select Report to Create**, choose **Get user login report**.

### Create New Report ✕

Select the report from the list

Select Report to Create

[→ Next](#) [✕ Cancel](#)

5. Enter the required time parameters to create the report.

### Create New Report

Provide the required parameters for the report query in JSON format

Required Parameters

```
{  "from_date" : "2023-01-01 00:00:00",  "to_date" : "2023-01-21 23:59:59",}
```

Generate a report of login. If no parameters are supplied, last 7 days are retrieved by default.  
**from\_date** : (OPTIONAL) From date in Y-M-d H:i:s format.  
**to\_date** : (OPTIONAL) To date in Y-M-d H:i:s format.  
**last\_number\_of\_hours** : (OPTIONAL) Number of last hours from now.

If from\_date is provided, then to\_date is also required.  
If last\_number\_of\_hours is provided along with **from\_date & to\_date**, from\_date & to\_date will not be considered.

```
{  "from_date" : "2020-01-01 00:00:00",  "to_date" : "2020-01-01 23:59:59",  "last_number_of_hours" : "24"}
```

[← Previous](#) [→ Next](#) [✕ Cancel](#)

6. Save the report with an appropriate name, and click **Finish**.

7. Click **Workflows** in the navigation panel.
8. Click **Add Workflow** and set the **If condition** as **Perform an action periodically at specified time and interval**.

9. Specify the time in the format given in the template. Specify the day interval as 1 to indicate that the workflow should be triggered daily.

### Create New Workflow

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "day_interval": 1,
  "time_string": "16:45:05"
}
```

This condition will be triggered when the current time matches the supplied time.

#### Parameters

**day\_interval (required)**  
Days interval (For daily operation, specify this value to be 1).

**time\_string (optional)**  
Time in format H:i:s (If not specified, it will run at 00:00:00).

**start\_date (optional)**  
Start date in format yyyy-mm-dd (If not specified, it will start from today).

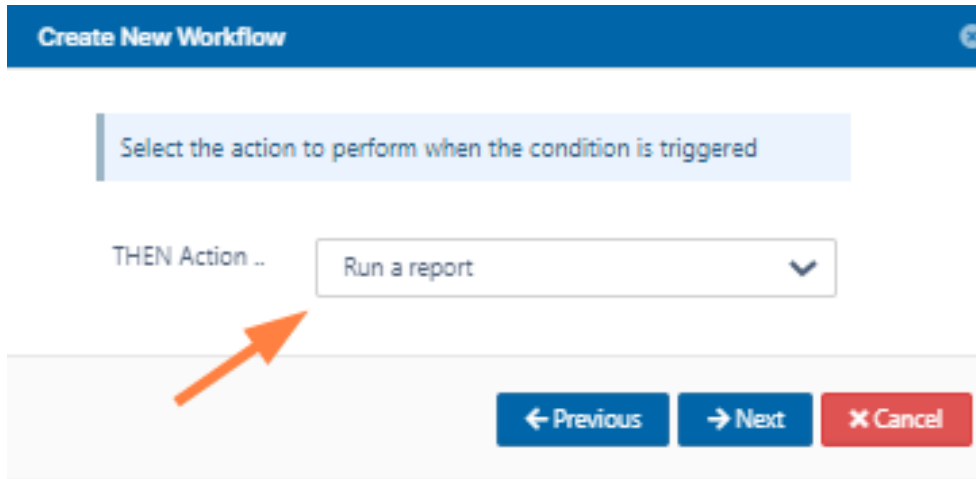
**end\_date (optional)**  
End date in format yyyy-mm-dd (If not specified, it will run indefinitely).

#### Configuration Example

```
{
  "day_interval": 7,
```

← Previous   → Next   × Cancel

10. Set the **THEN Action** as **Run a report**.



Create New Workflow

Select the action to perform when the condition is triggered

THEN Action .. Run a report

← Previous → Next × Cancel

11. Specify the report name created previously and the emails or group of the users who will receive the report in the format given in the template.

### Create New Workflow

Provide the required parameters for the action to be executed

Required Parameters

```
{
  "report_name": "User Login Report",
  "comma_separated_email_id":
  "liz@example.com,josh@example.com"
}
```

Execute a saved report and send results via email.  
Admin will be automatically notified.

**report\_name:** Name of the report to run. The report must already be created in the reports section and that exact report name must be provided here.  
**comma\_separated\_email\_id:** Email ids in comma-separated format. All email ids will be notified.  
**comma\_separated\_group\_name:** Group names in comma-separated format. All users in the group will be notified.

```
{
  "report_name": "my_report",
  "comma_separated_email_id":
  "a@x.com,b@y.com",
  "comma_separated_group_name": "Group A,Group B"
}
```

[← Previous](#) [→ Next](#) [× Cancel](#)

12. Save the workflow with an appropriate name.

**Create New Workflow**
⊗

Name for this action

Workflow Name

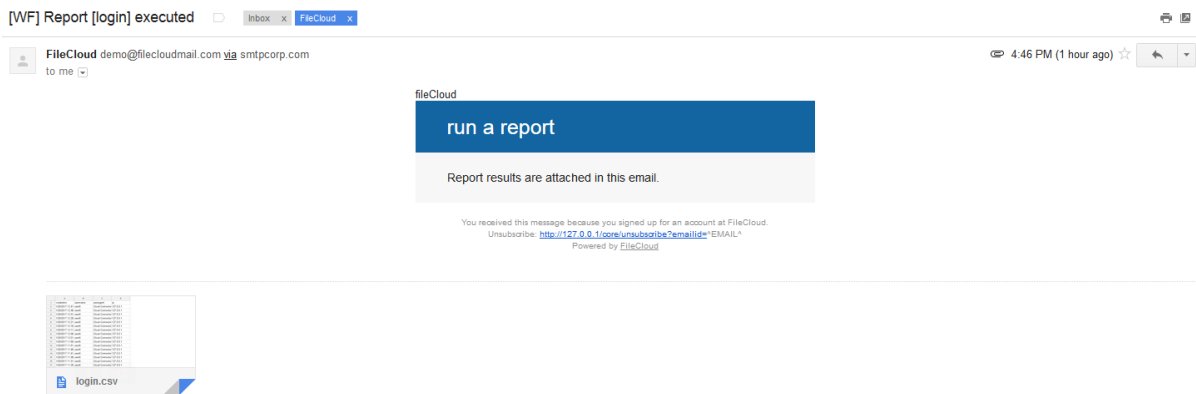
Run user login report

← Previous

→ Finish

✕ Cancel

13. Once the workflow is run the report results are sent to the email ids specified.



Similar workflows can be created to run reports with THEN conditions like:

- **Perform an action on the specified date**
- **Perform an action periodically**

## Detect and Delete Inactive Files Workflow

This workflow recipe deletes all unused files.

- The workflow checks the number of days a file was unused and deletes those files.
- You can provide a set of email ID's to send the generated report to.

**To create a workflow that detects and deletes inactive files:**

1. Log in to the admin portal.
2. Click **Workflow** on the left navigation panel.
3. Click **Add Workflow**.
4. Set **IF Condition** to **If file was not modified for specified days**, and click **Next**.

Create New Workflow
✕

Select the condition

IF Condition .. If file was not modified/created in specified days ▾

→ Next

✕ Cancel

5. Enter the parameters in the given format.

Create New Workflow
✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition will be triggered if a file was last modified the specified days ago. The check will run once a day.

### Important Notes

**exclude:** When enabled, excludes matching the specified path from the action and performs the action for all that don't match the path.

**trigger\_date:** The **MODIFIED\_DATE** option is only applicable for files.

### Parameters

**parent\_folder\_path\_string (required)**  
Path of the folder as shown in the file browser.

**number\_of\_days (required)**  
Number of days since a file was modified.

**skip\_recently\_accessed (optional)**  
When TRUE, files viewed or downloaded within

When TRUE, files viewed or downloaded within number\_of\_days will be treated as recently modified.

**exclude\_recyclebin (optional)**  
When TRUE, files on recycle bin path will not be considered.

**exclude (optional)**  
Exclude items matching the specified path/pattern from the action.

**trigger\_date (optional)**  
Defines which file date to use when evaluating the condition (BOTH, MODIFIED\_DATE, CREATED\_DATE).

**expression (optional)**

← Previous      → Next      × Cancel

For example:

```
{
  "parent_folder_path_string": "/johndoe",
  "number_of_days": 7,
  "skip_recently_accessed": 1,
  "exclude_recyclebin": 1,
  "exclude": ".*secret.*",
  "trigger_date": "BOTH"
}
```

**Note** - This workflow only applies to Managed Storage and not to Network Folders.  
To identify a FileCloud specific path for a folder, see [Identifying a FileCloud Specific Path](#).

6. Click **Next**.

7. Set **THEN Action** to **Delete the file(s)**.

8. Click **Next**.  
Set any of the parameters. They are all optional.

Create New Workflow
✕

Provide the required parameters for the action to be executed

Required Parameters

```
{
  "parameter name": "value"
}
```

Delete files.

**delete\_empty\_folders (Optional):** When files are deleted, delete the parent folder as well if it is empty.

**notify\_owner (Optional):** When the files are deleted, send an email to the owners.

**comma\_separated\_email\_id (Optional):** Email ids in comma separated format as shown below. All email ids will be notified.

**comma\_separated\_group\_name (Optional):** Group names in comma separated format. All users in the group will be notified.

```
{
  "delete_empty_folders": 1,
  "notify_owner": 0,

  "comma_separated_email_id": "email1@email.com, email2@email.com",
  "comma_separated_group_name": "Group A, Group B"
}
```

← Previous

→ Next

✕ Cancel

For example:

```
{
  "delete_empty_folders": true
}
```

```
}

```

9. Click **Next**.
10. Enter a **Workflow Name** and click **Finish**.

## Detect and Disable Inactive Users Workflow

This workflow recipe disables a user when the user is no longer active and notifies the user through email once the account is deactivated.

- The last login date of the user is used to know if the user is Active or Inactive.
- You can avoid looking at users who have not begun using FileCloud.
- You provide the email ID's to which a report of disabled users is sent.

**To create a workflow that detects and disables inactive users:**

1. Login to Admin Portal
2. Navigate to Workflow on the left navigation
3. Click the **Add Workflow** button
4. Set the If Condition " **If a user's last login is older than..** "

5. Enter the required parameters in the given format.

```
{
  "last_login_days_ago":30,
  "user_account_type":"USER_ACCOUNT_ANY",
  "day_interval":1
}
```

### Create New Workflow

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "last_login_days_ago": 30,
  "user_account_type":
  "USER_ACCOUNT_ANY",
  "day_interval": 1,
}
```

This condition is triggered if a user's last login is older than specified days. This check will run based on the day interval configured.

### Parameters

#### **last\_login\_days\_ago (required)**

Number of days since last login.

#### **user\_account\_type (required)**

Type of user account (USER\_ACCOUNT\_ANY, USER\_ACCOUNT\_FULL\_ACCESS, USER\_ACCOUNT\_GUEST\_ACCESS, USER\_ACCOUNT\_LIMITED\_ACCESS, USER\_ACCOUNT\_DISABLED).

#### **day\_interval (required)**

Days interval (For daily operation, specify this value to be 1).

#### **skip\_users\_not\_logged\_in (optional)**

Skip users who have never logged in to the system.

#### **skip\_admin\_users (optional)**

Skip promoted admins. Default is true.

#### **expression (optional)**

Additional condition using Expression Language syntax. Supports user context variables.

- 6.

Click **Next**, and set the **Then Action** to " Disable user account ".

Create New Workflow ×

---

Select the action to perform when the condition is triggered

THEN Action ..  ▼

---

← Previous Next → × Cancel

7. Enter the Required parameters in the given format.

```
{  
  "comma_separated_email_id": "admin@abccompany.com,hr@management.com"  
}
```

## Create New Workflow



Provide the required parameters for the action to be executed

Required Parameters

```
{  
  
  "comma_separated_email_id": "admin@abc.c  
om,hr@management.com",
```

Disable user and send email after performing this action.

**comma\_separated\_email\_id:** Email ids in comma separated format as shown below

**comma\_separated\_group\_name (optional):** Group names in comma separated format. All email ids will be notified.

**donot\_email\_user (optional):** Do not send email to user affected (1 or 0). Default 0

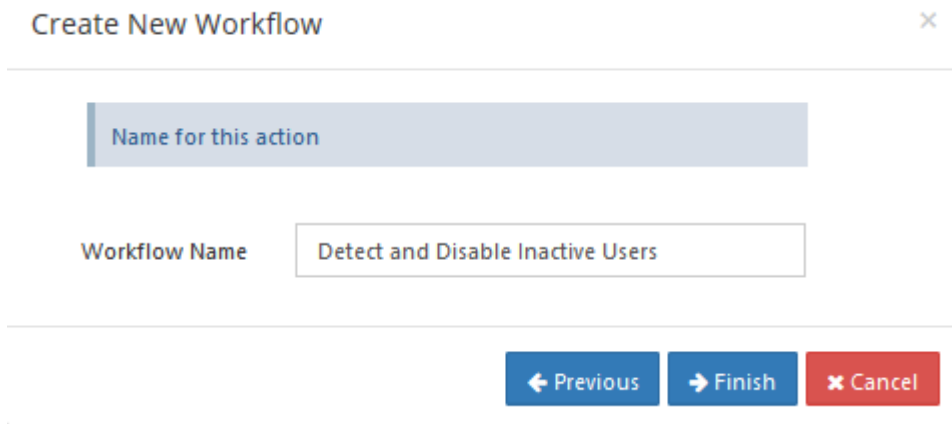
```
{  
  
  "comma_separated_email_id": "xyz@a.com,abc@b.com",  
  "comma_separated_group_name": "Group A,Group B",  
  "donot_email_user": 0  
}
```

← Previous

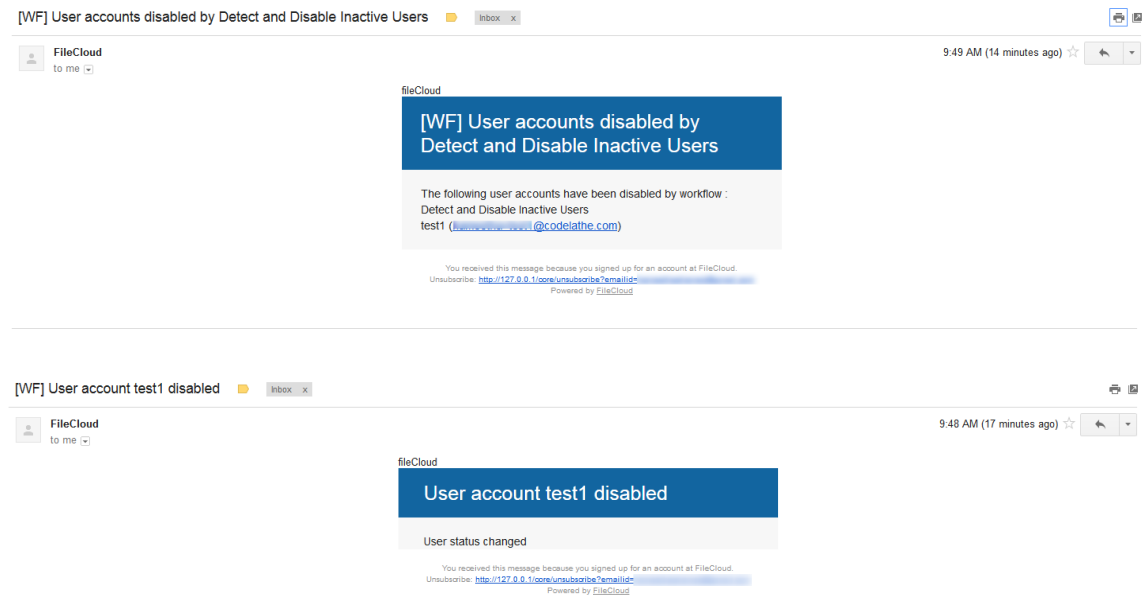
→ Next

× Cancel

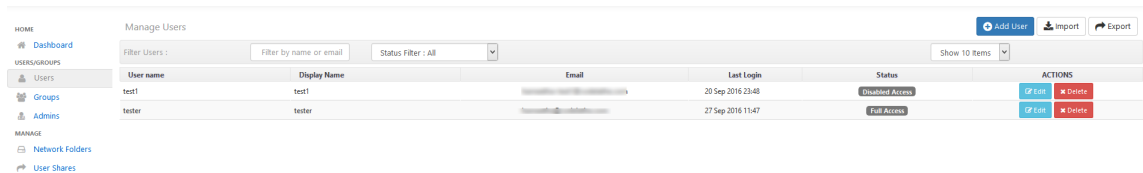
8. Click **Next**, give an appropriate workflow name and click **Finish**.



9. The user accounts are disabled and the notifications are sent once the workflow is executed.



10. Go to the users list to confirm that the users are disabled.



## Detect and Generate Inactive File List Workflow

This workflow recipe sends an email report with a list of inactive files.

- The workflow checks the number of days a file was unused and generates a report.
- You can provide a set of email IDs the generated report will be emailed to.

**To create a workflow that detects and generates a list of inactive files:**

1. Log in to the admin portal.
2. Click **Workflow** in the navigation panel.
3. Click **Add Workflow**.
4. Set **IF Condition** to **If file was not modified/created for specified days**, and click **Next**.

5. Enter the parameters in the given format.

Path of the folder as shown in the file browser.

**number\_of\_days (required)**  
Number of days since a file was modified.

**skip\_recently\_accessed (optional)**  
When TRUE, files viewed or downloaded within number\_of\_days will be treated as recently modified.

**exclude\_recyclebin (optional)**  
When TRUE, files on recycle bin path will not be considered.

**exclude (optional)**  
Exclude items matching the specified path/pattern from the action.

**trigger\_date (optional)**  
Defines which file date to use when evaluating the condition (BOTH, MODIFIED\_DATE, CREATED\_DATE).

**expression (optional)**  
Additional condition using Expression Language

← Previous      → Next      ✕ Cancel

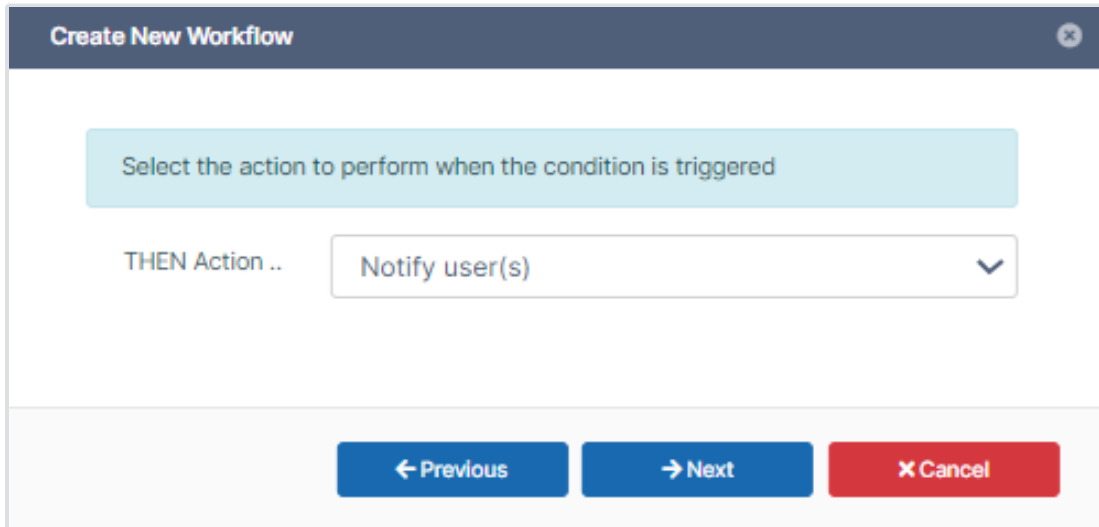
For example:

```
{
  "parent_folder_path_string": "/jenniferp",
  "number_of_days": 15,
  "skip_recently_accessed": 1,
  "exclude_recyclebin": 1,
  "exclude": ".*secret.*",
  "trigger_date": "BOTH",
}
```

**Note:** This workflow applies only to Managed Storage and not to Network Folders.

To identify a FileCloud specific path for a folder please refer to [Identifying a FileCloud Specific Path](#).

6. Click **Next**.
7. Set **THEN Action** to **Notify user(s)**.



Create New Workflow

Select the action to perform when the condition is triggered

THEN Action .. Notify user(s)

← Previous → Next × Cancel

8. Click **Next**.
9. Enter the parameters in the given format.  
For example,

```
{  
  "comma_separated_email_id": "lynnep@example.com"  
}
```

### Create New Workflow ✕

Provide the required parameters for the action to be executed

Required Parameters

```
{
  "comma_separated_email_id": "lynnep@example.com",
}
```

Send email. Admin will be automatically notified.  
Provide additional email if required to be notified.

**comma\_separated\_email\_id:** Email ids in comma-separated format. All email ids will be notified.  
**comma\_separated\_group\_name:** Group names in comma-separated format. All users in the group will be notified.

```
{
  "comma_separated_email_id": "xyz@a.com,abc@b.com",
  "comma_separated_group_name": "Group A,Group B"
}
```

← Previous → Next ✕ Cancel

10. Click **Next**.

11. Enter a **Workflow Name**, and click **Finish**.

**Create New Workflow**
✕

Name for this action

Workflow Name

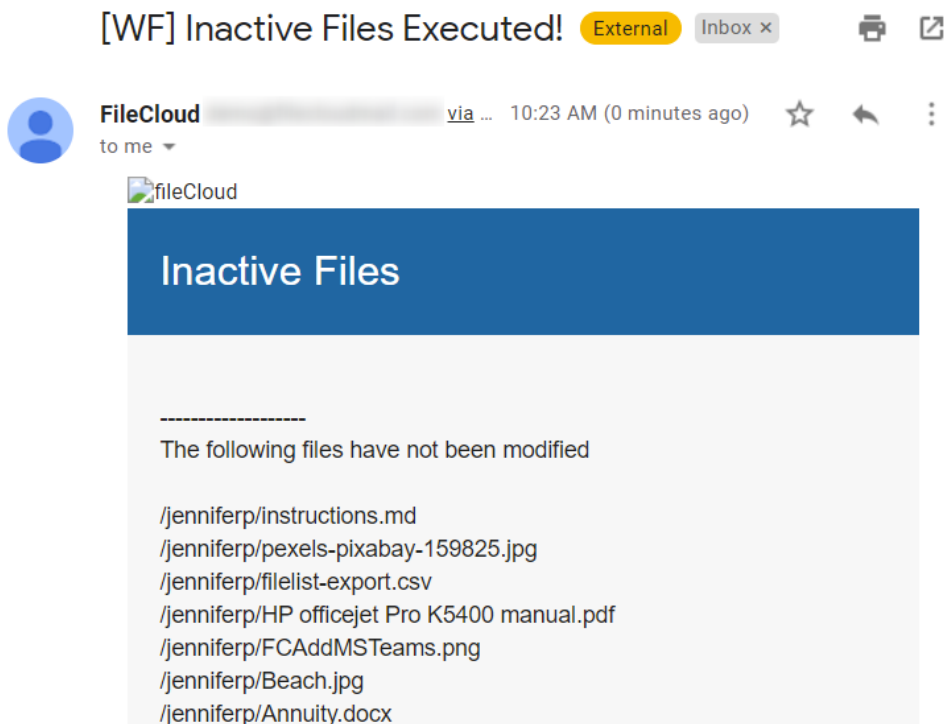
Generate a report of inactive files

← Previous

→ Finish

✕ Cancel

When you run the workflow, the emails specified receive an email with a list of inactive files.



## Detect and Notify Failed Signatures Workflow

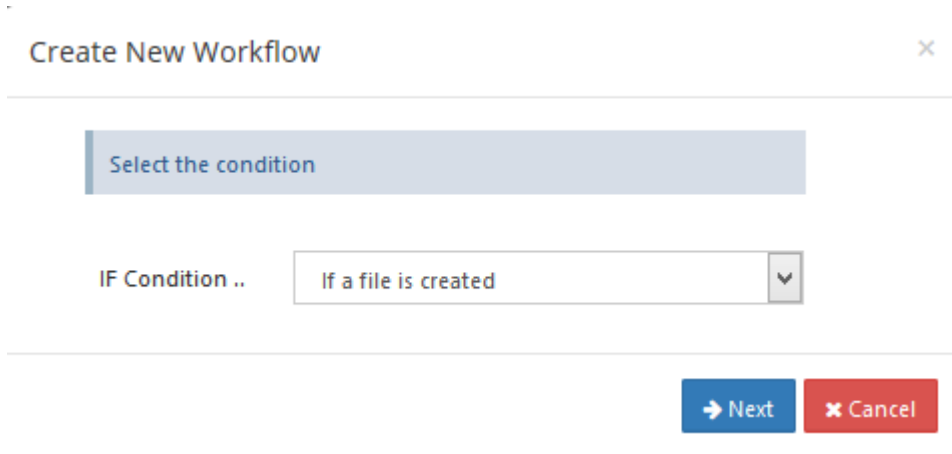
This workflow recipe creates an ALERT notification when a file is created or uploaded to FileCloud with a signature mismatch.

- This ALERT notification can be set for a specific folder location only.
- You can view the alerts on the Admin Portal in the alert panel.

**To create a workflow to detect and notify when a file with a signature mismatch is uploaded:**

1. Login to Admin Portal

2. Navigate to **Workflow** on the left navigation panel.
3. Click the **Add Workflow** button.
4. Set the **If Condition** to **If a file is created**.



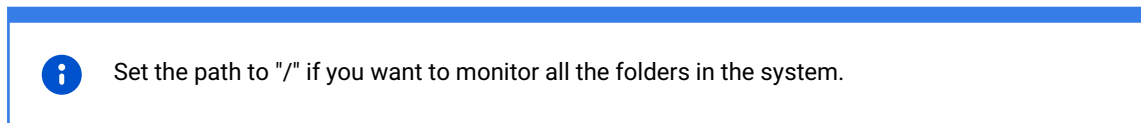
Create New Workflow

Select the condition

IF Condition .. If a file is created

Next Cancel

5. Click **Next**.
6. **Set the parameters as shown in the following screenshot.**  
To identify a FileCloud specific path for a folder please refer to [Identifying a FileCloud Specific Path](#).



### Create New Workflow

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parent_folder_path_string":
  "/robert/SampleDocs",
```

This condition will be triggered when a file is created.

#### Important Notes

**exclude:** When enabled, excludes matching the specified path from the action and performs the action for all that don't match the path.

#### Parameters

**parent\_folder\_path\_string (required)**  
Path of the folder as shown in the file browser.

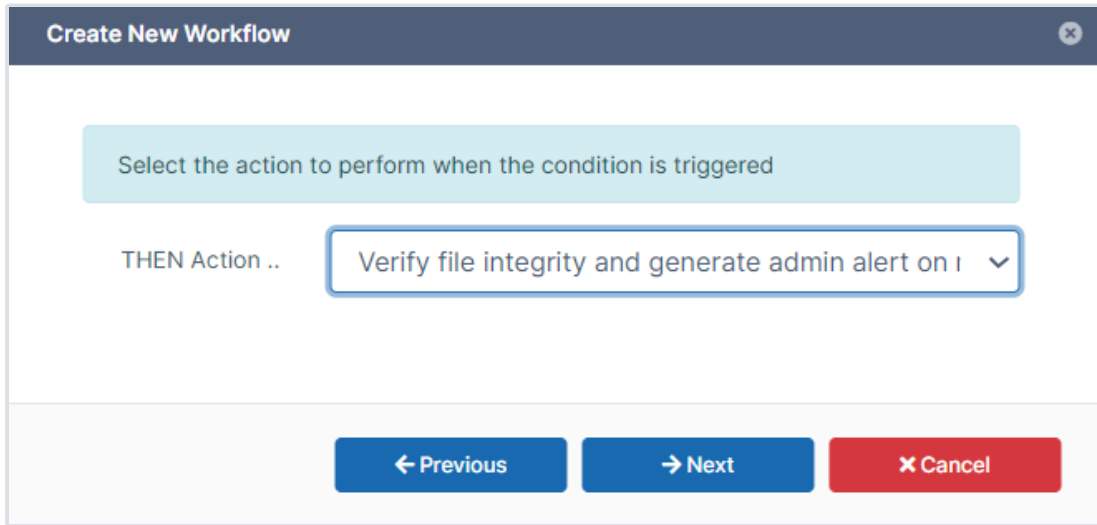
**use\_regex (optional)**  
Specifies whether the path has a regex format.

**exclude (optional)**  
Exclude items matching the specified path/pattern from the action.

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

7.

Click **Next**, and set **Then Action** to **Verify file integrity and generate admin alert on mismatch**



Create New Workflow

Select the action to perform when the condition is triggered

THEN Action ..

← Previous   → Next   × Cancel

8. **Click Next**, and **enter the size limit of files to scan**.

### Create New Workflow ✕

Provide the required parameters for the action to be executed

Required Parameters

```
{
  "ignore_file_size_in_mb": 10
}
```

This action will attempt to identify file type based on its content and check if it matches its mime type.  
If the file type does not match, generate admin portal alert.  
File sizes larger than the specified size will not be scanned.  
**ignore\_file\_size\_in\_mb:** Do not scan files larger than this limit specified in megabytes

```
{
  "ignore_file_size_in_mb": 10
}
```

← Previous → Next ✕ Cancel

9. Click **Next**, and give a name to this workflow.

### Create New Workflow ✕

Name for this action

Workflow Name

← Previous
→ Finish
✕ Cancel

Once this workflow is set, the Admin receives alert messages in the **Alerts** page.

Manage Alerts

Filter Alert Level All Remove Clear All

Date	Severit	Description	ACTIONS
<input type="checkbox"/> 2016-Sep-26 02:26:58 AM	Warning	[Detect and notify signature variance] File /npriya/fioschk/doc scr3.klx created by npriya failed signature check. The content is not matching the file type extension.	<a href="#">More</a>
<input type="checkbox"/> 2016-Sep-02 17:38:16 PM	Critical	ERROR   2016-09-02 17:38:16   1   Call to a member function getParametersForAction() on a non-object   /var/www/core/framework/workflowcontroller.class.php:537	<a href="#">More</a>
<input type="checkbox"/> 2016-Sep-02 17:37:19 PM	Critical	ERROR   2016-09-02 17:37:19   1   Call to a member function getParametersForAction() on a non-object   /var/www/core/framework/workflowcontroller.class.php:537	<a href="#">More</a>
<input type="checkbox"/> 2016-Aug-04 10:55:11 AM	Warning	[deletebadfile] File /anisad/upload/ss.jpg created by anisad failed signature check. The content is not matching the file type extension. File version deleted	<a href="#">More</a>
<input type="checkbox"/> 2016-Aug-02 05:40:18 AM	Warning	[file verifier] File /EXTERNAL/Amazon S3 test bucket/fff_cloud/monalisa.jpg__128_xx_128 created by hameethatest failed signature check. The content is not matching the file type extension.	<a href="#">More</a>
<input type="checkbox"/> 2016-Aug-02 05:40:18 AM	Warning	[file verifier] File /EXTERNAL/Amazon S3 test bucket/fff_cloud/monalisa.jpg__800_xx_600 created by hameethatest failed signature check. The content is not matching the file type extension.	<a href="#">More</a>
<input type="checkbox"/> 2016-Aug-02 05:40:18 AM	Warning	[file verifier] File /EXTERNAL/Amazon S3 test bucket/fff_cloud/monalisa.jpg__180_xx_180 created by hameethatest failed signature check. The content is not matching the file type extension.	<a href="#">More</a>
<input type="checkbox"/> 2016-Aug-02 05:40:17 AM	Warning	[file verifier] File /EXTERNAL/Amazon S3 test bucket/fff_cloud/letter1.doc__180_xx_180 created by hameethatest failed signature check. The content is not matching the file type extension.	<a href="#">More</a>
<input type="checkbox"/> 2016-Aug-02 05:40:17 AM	Warning	[file verifier] File /EXTERNAL/Amazon S3 test bucket/fff_cloud/letter1.doc__128_xx_128 created by hameethatest failed signature check. The content is not matching the file type extension.	<a href="#">More</a>
<input type="checkbox"/> 2016-Aug-02 05:40:17 AM	Warning	[file verifier] File /EXTERNAL/Amazon S3 test bucket/fff_cloud/letter.doc__128_xx_128 created by hameethatest failed	<a href="#">More</a>

## Detect and Notify Inactive Users Workflow

This workflow recipe sends an email report with a list of all the inactive users.

- The last login date of the user is used to determine if the user is Active or Inactive
- You can avoid looking at users who have not begun using FileCloud
- You provide a set of email ID's to which the generated report will be mailed

**To create a workflow that sends an email report with a list of all the inactive users:**

1. Login to Admin Portal
2. Navigate to Workflow on the left navigation
3. Tap on the Add Workflow button
4. Set the If Condition **If a user's last login is older than...**, and click **Next**.

### Create New Workflow ✕

Select the condition

IF Condition ..  ▼

➔ Next ✕ Cancel

5. Enter the required parameters in the given format

```
{  
  "last_login_days_ago": 14,  
  "user_account_type": "USER_ACCOUNT_LIMITED_ACCESS",  
  "day_interval": 5,  
  "skip_users_not_logged_in": 1  
}
```

**Create New Workflow**
✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "last_login_days_ago": 14,
  "user_account_type":
  "USER_ACCOUNT_LIMITED_ACCESS",
  "day_interval": 5,
  "skip_users_not_logged_in": 1
}
```

This condition is triggered if a user's last login is older than specified days. This check will run based on the day interval configured.

### Parameters

**last\_login\_days\_ago (required)**  
Number of days since last login.

**user\_account\_type (required)**  
Type of user account (USER\_ACCOUNT\_ANY, USER\_ACCOUNT\_FULL\_ACCESS, USER\_ACCOUNT\_GUEST\_ACCESS, USER\_ACCOUNT\_LIMITED\_ACCESS, USER\_ACCOUNT\_DISABLED).

**day\_interval (required)**  
Days interval (For daily operation, specify this value to be 1).

**skip\_users\_not\_logged\_in (optional)**  
Skip users who have never logged in to the system.

**skip\_admin\_users (optional)**  
Skip promoted admins. Default is true.

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

6. Click Next, set Then Action **Generate an email report**.

### Create New Workflow ×

---

Select the action to perform when the condition is triggered

THEN Action ..

---

← Previous → Next ✕ Cancel

7. Enter the Required parameters in the given format

```
{  
  "comma_separated_email_id": "admin@abc.com,hr@management.com"  
}
```

## Create New Workflow



Provide the required parameters for the action to be executed

Required Parameters

```
{
  "comma_separated_email_id": "admin@abc.c
om,hr@management.com"
}
```

Send email with information about user. Does not change user's status.

**comma\_separated\_email\_id:** Email ids in comma separated format as shown below

**comma\_separated\_group\_name (optional):** Group names in comma separated format. All email ids will be notified.

```
{
  "comma_separated_email_id": "xyz@a.com,abc@b.com",
  "comma_separated_group_name": "Group A,Group B"
}
```

← Previous

→ Next

✕ Cancel

8.

Click **Next**, give an appropriate workflow name, and click **Finish**.

## Notify on File Upload Workflow

This workflow recipe sends an email notification when a file is created or uploaded to FileCloud.

- This notification can be set for a specific folder location only
- The admin can provide a set of email ids to which the notification email has to be sent

**To create a workflow to notify when a file is uploaded:**

1. Login to Admin Portal

2. Navigate to Workflow on the left navigation
3. Tap on the Add Workflow button
4. Set the If Condition to **If a file is added or updated** and click **Next**

Create New Workflow

Select the condition

IF Condition .. If a file is added or updated

Next Cancel

5. Enter the Required parameters in the given format, and click **Next**.

```
eg: Path : My Files Location (/jenniferp/CustomerAccounts)
{
  "parent_folder_path_string":"/jenniferp/CustomerAccounts"
}
```

To identify FileCloud specific path for a folder please refer this [Identifying a FileCloud Specific Path](#).

**i** Set the path to "/" if you want to monitor all the folders in the system.

### Create New Workflow

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parent_folder_path_string":
  "/jenniferp/CustomerAccounts"
}
```

This condition will be triggered when a file is created or updated.

#### Important Notes

**exclude:** When enabled, excludes matching the specified path from the action and performs the action for all that don't match the path.

#### Parameters

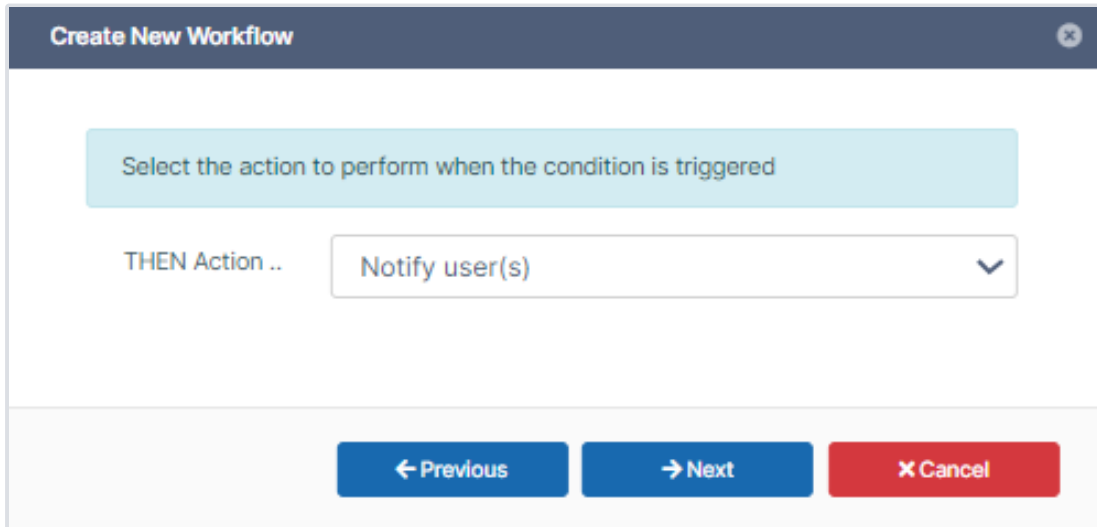
**parent\_folder\_path\_string (required)**  
Path of the folder as shown in the file browser.

**use\_regex (optional)**  
Specifies whether the path has a regex format.

**exclude (optional)**  
Exclude items matching the specified path/pattern from the action.

**expression (optional)**  
Additional condition using Expression Language syntax. Supports user context variables.

- Set the then action to **Notify user(s)**, and click **Next**.



Create New Workflow

Select the action to perform when the condition is triggered

THEN Action .. Notify user(s)

← Previous → Next × Cancel

7. Enter the Required parameters in the given format

```
{  
  "comma_separated_email_id": "admin@abccompany.com,hr@management.com"  
}
```

### Create New Workflow ✕

Provide the required parameters for the action to be executed

Required Parameters

```
{
  "comma_separated_email_id": "admin@abc.com,hr@management.com"
}
```

Send email. Admin will be automatically notified.  
Provide additional email if required to be notified.

**comma\_separated\_email\_id:** Email ids in comma-separated format. All email ids will be notified.  
**comma\_separated\_group\_name:** Group names in comma-separated format. All users in the group will be notified.

```
{
  "comma_separated_email_id": "xyz@a.com,abc@b.com",
  "comma_separated_group_name": "Group A,Group B"
}
```

[← Previous](#) [→ Next](#) [✕ Cancel](#)

8. Click **Next**, then give an appropriate workflow name and click **Finish**.

### Create New Workflow ✕

---

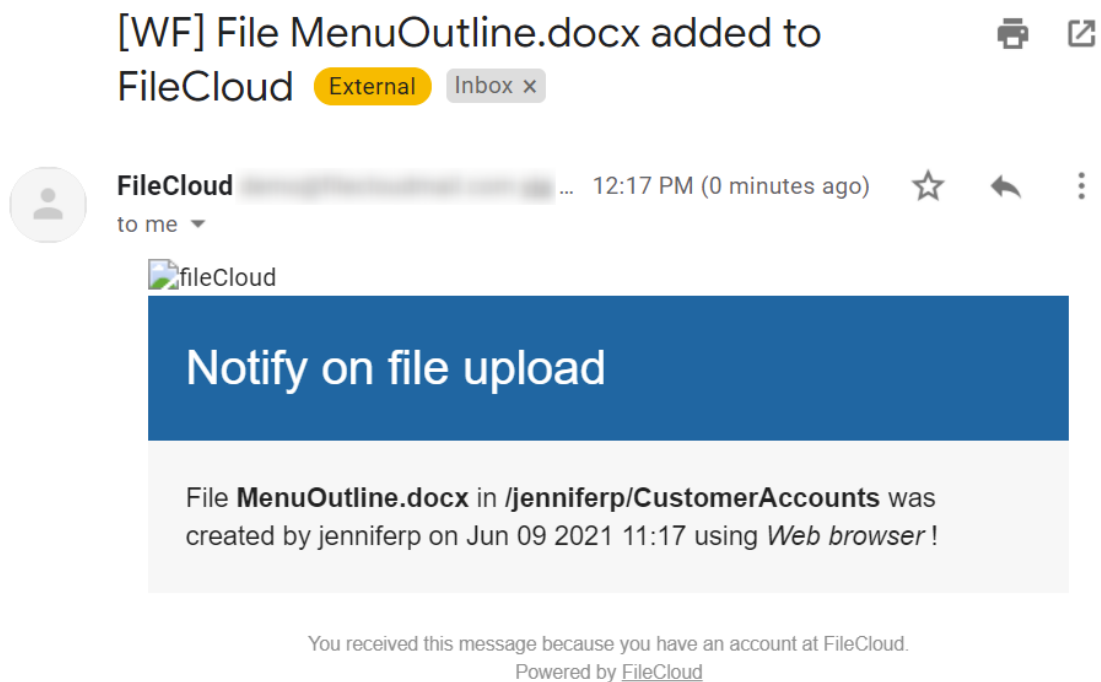
Name for this action

Workflow Name

---

← Previous → Finish ✕ Cancel

9. Sample notification email on a file upload.



## Periodic Script Workflow

This workflow recipe runs a specified command at a periodic interval.

- This requires you to set up cron job or task scheduler to run the command.

- The frequency depends on the cron or task scheduler frequency you set

**To create a workflow that performs a periodic script:**

1. Login to Admin Portal
2. Navigate to Workflow on the left navigation
3. Tap on the Add Workflow button
4. Set the If Condition " Perform an action periodically "

Create New Workflow ×

---

Select the condition

IF Condition ..  ▼

---

→ Next × Cancel

5. Click on Next, This condition does not require any parameters

**Create New Workflow**
✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{
  "parameter name": "value"
}
```

This condition will be triggered periodically. This requires a cron job or a task scheduler to be set.

Frequency depends on the cron or task scheduler frequency.

### Parameters

**No additional parameters are required.**

← Previous

→ Next

✕ Cancel

6. Set the Then Action "Execute a command"

**Create New Workflow**
✕

Select the action to perform when the condition is triggered

THEN Action ..

Execute a command
▼

← Previous

→ Next

✕ Cancel

7. Enter the required Command.

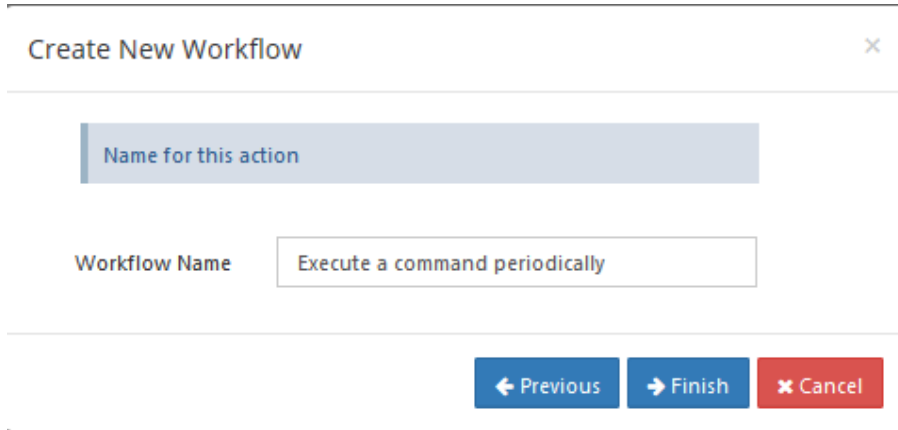
In the following example, ls causes all files and folders to be listed.:

```
{
  "command_line": "ls"
}
```

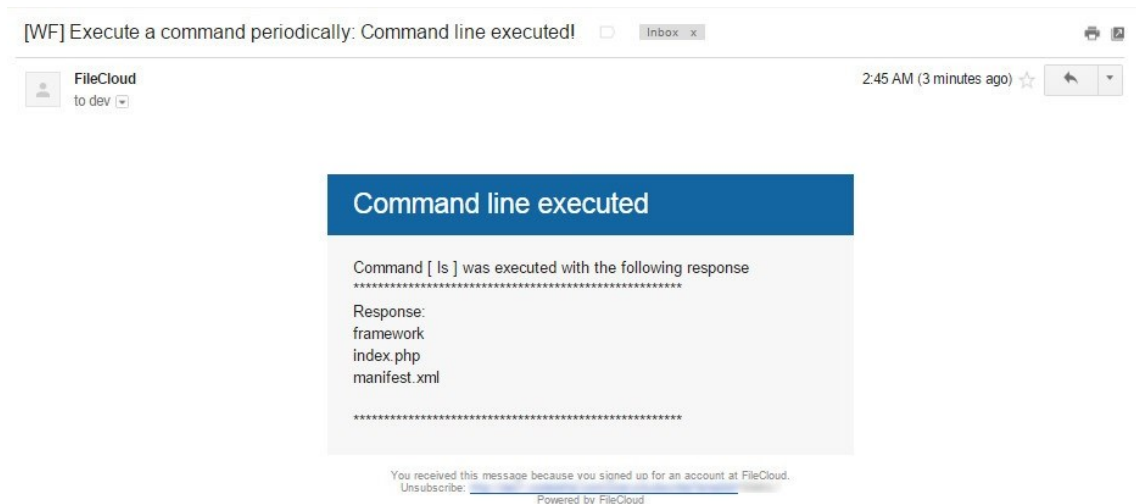
```
}

```

8. Enter the Workflow name and Finish.



9. A notification email will be sent to the Admin, with the response information of command line execution.



## Periodically Send Custom Email Workflow

This workflow recipe sends a custom email to selected users at specified intervals.

In the example, an email is sent to users in the **Employees** group every 30 days from January to June to remind them to submit their receipts to a **Reimbursements** folder.

**To create a workflow that sends a custom email periodically:**

1. In the admin portal's navigation panel, click **Workflows**.
2. In the **Manage Workflows** screen, click **Add Workflow**.
3. In **IF Condition**, choose **Perform an action periodically at specified time and interval**.

Create New Workflow

Select the condition

IF Condition .. Perform an action periodically at specified

Next Cancel

4. Click **Next**.
5. Set the parameters according to your requirements for the interval.  
In the image below, the message is scheduled to be sent approximately monthly for the first half of 2024 (every 30 days from January 1, 2024 to June 30, 2024).

Create New Workflow ✕

Provide the required parameters for the condition in JSON Format

Required Parameters

```
{  
  "day_interval": 30,  
  "start_date": "2024-01-01",  
  "end_date": "2024-06-30"  
}
```

This condition will be triggered when the current time matches the supplied time.

**day\_interval** : Days interval (For daily operation, specify this value to be 1)

**time\_string** : (OPTIONAL) Time in format H:i:s (If not specified, it will run at 00:00:00)

**start\_date** : (OPTIONAL) Start date in format yyyy-mm-dd (If not specified, it will start from today)

**end\_date** : (OPTIONAL) End date in format yyyy-mm-dd (If not specified, it will run indefinitely)

```
{  
  "day_interval": 7,  
  "time_string": "08:00:00",  
  "start_date": "2020-01-01",  
  "end_date": "2020-01-31"  
}
```

[← Previous](#) [→ Next](#) [✕ Cancel](#)

- 6. Click **Next**.
- 7. In **THEN Action**, choose **Send an email**.

Create New Workflow ✕

Select the action to perform when the condition is triggered

THEN Action ..  ▼

[← Previous](#) [→ Next](#) [✕ Cancel](#)

8. Click **Next**.
9. Use the parameters to enter the details of the custom email.  
In the parameters below, an email with the subject **Reimbursements** reminds users in the group **Employees** to copy their receipts into the Reimbursements folder.  
Since **is\_html** is set to **1**, tags in the body are recognized as HTML tags and formatted.

```
{
  "subject": "Reimbursements",
  "body": "<p>Month's end is almost here.</p><p>Copy any receipts into the
<b>Reimbursements</b> folder to be reimbursed.</p>",
  "is_html": 1,
  "groups": "Employees",
}
```

### Create New Workflow

Provide the required parameters for the action to be executed

Required Parameters

```
{
  "subject": "Reimbursements",
  "body": "<p>Month's end is almost
here.</p><p>Copy any receipts into the
<b>Reimbursements</b> folder to be
reimbursed.</p>",
```

Execute command for sending email.

**subject** : (REQUIRED) Subject of the email.  
**body** : (REQUIRED) Body of the email.  
**is\_html** : (OPTIONAL) 1 if the body is in HTML format, 0 if it is in plain text format. Default is 0.  
**users** : (OPTIONAL) Comma separated list of usernames to send the email to.  
**groups** : (OPTIONAL) Comma separated list of group names to send the email to.  
**notify** : (OPTIONAL) Boolean to specify whether to send the email to users automatically identified as impacted by the related action. Default is false.

*Note: Emails will always be sent to the users explicitly listed in the **users** field and to all members of the groups in the **groups** field. Setting **notify** to true adds the affected users to the recipients list as well.*

If no users, groups or impacted users are found,

[← Previous](#) [→ Next](#) [× Cancel](#)

10. Click **Next**.

11. Give the workflow a name, and click **Finish**.

**Create New Workflow**
✕

Name for this action

Workflow Name

Reimbursement reminder

← Previous
→ Finish
✕ Cancel

The workflow is listed in the **Manage Workflows** page. It will run automatically in 30 days.

🔗 Manage Workflows

Workflow

Workflow Name	IF THIS	THEN THAT
Reimbursement reminder	Perform an action periodically at specified time and interval	Send an email

12. In 30 days, the workflow automatically runs, and sends the following email to users of the group **Employees**.

## Reimbursements

External
Inbox x

**FileCloud** <demo@filecloudmail.com>

to me ▾

2:12 PM (0 minutes ago)

Month's end is almost here.

Copy any receipts into the **Reimbursements** folder to be reimbursed.

↩ Reply

➦ Forward

# Automated Workflow Management




Automated Workflows are available in FileCloud 21.2 and later. Prior to FileCloud 23.251, by default, all users could share automated workflows. Beginning in 23.251, the setting **Allow Automation Workflow Sharing** must be enabled to permit all users to share automated workflows.

## Disabling Automated Workflows













Automated Workflows enable users in the user portal to create automated processes, such as file approvals and file storage. By default the Automated Workflow function is enabled, but you can disable it.

To disable the Automated Workflows for certain users, disable them in the users' policies.

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.

### Policies

New Policy  
Create a new policy New Policy

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

<< < Page  of 1 > >>  
 2 rows

2. Open the policy assigned to the users who you do not want to access Automated Workflows.
3. Click the **Users** tab.
4. Scroll down and locate the **Disable workflow automation** setting. Enable the setting.

Allow group deletion	<input type="checkbox"/>
Allows users to delete groups from user portal	
Allow Workflow Automation Sharing	<input type="checkbox"/>
Enables/disables workflow automation sharing	
<b>Disable workflow automation</b>	<input checked="" type="checkbox"/>
Require share approval workflow	<input type="checkbox"/>
Enables/disables mandatory workflow automation for shares	

5. Click **Save**.

The **Workflows** navigation link no longer appears in the user portal of users assigned to the policy.

## Enable Sharing of Automated Workflows

By default, users other than promoted admins with all user share and file privileges, cannot share automated workflows with other users. Enabling this setting allows all users to share automated workflows.

To enable sharing of Automated Workflows for certain users, enable the setting in the users' policies.

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.

## Policies

New Policy

Create a new policy

New Policy

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

<< < Page  of 1 > >>  
 2 rows

2. Open the policy assigned to the users who you want to be able to share automated workflows.

3. Click the **Users** tab.

4. Scroll down and locate the **Allow Workflow Automation Sharing** setting. Enable the setting.

Allow group deletion	<input type="checkbox"/>
Allows users to delete groups from user portal	
<b>Allow Workflow Automation Sharing</b>	<input checked="" type="checkbox"/>
Enables/disables workflow automation sharing	
Disable workflow automation	<input type="checkbox"/>

5. Click **Save**.

Now, all users have the ability to share automation workflows.

## Requiring a Share Approval Workflow

A Share Approval workflow is a specialized type of workflow that requires a share to be approved before it is made available.

In order for a Share Approval workflow to become active for specific users, you must mark it required in their policies and choose the specific Share Approval workflow to use.



For the Share Approval workflow to apply to all users' shares in FileCloud, it must be created by a [promoted Admin](#) with all User Share permissions enabled. Otherwise, the share approval workflow will only apply to shares initiated by the workflow creator on files and folders in their My Files folder.

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.

## Policies

New Policy

Create a new policy

New Policy

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

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 2 rows

- Open the policy assigned to the users who you do not want to access Automated Workflows.
- Click the **Users** tab.
- Scroll down to **Require share approval** and enable it.
- In **Selected Workflow**, choose the Share Approval workflow to make effective.

Disable workflow automation

**Require share approval workflow**   
 Enables/disables mandatory workflow automation for shares

Select workflow

Selected automation workflow for shares

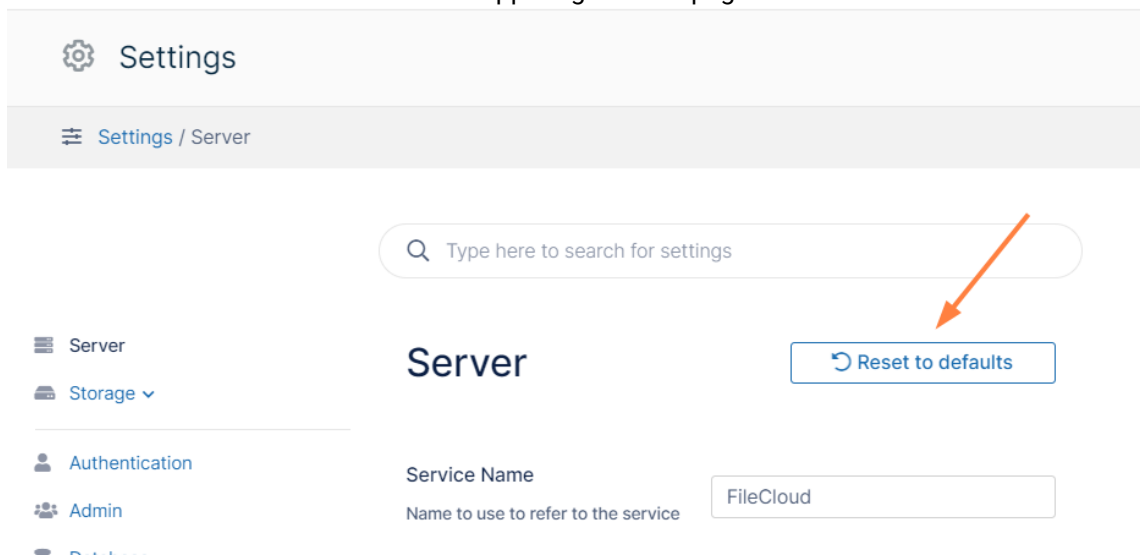
For end user information on creating Automated Workflows, see [Workflow Automation](#).

## Reset Settings and Customizations

**i** Beginning in FileCloud 20.1, the option for resetting all selections in the Settings and Customization pages is located in the Reset tab on the Settings page. In FileCloud versions earlier than 20.1, the **Reset All** button appears in the upper-right corner of the Settings and Customization pages and resets both settings and customizations regardless of which page you access it from.

### To return to default settings for options in Settings


1. In the FileCloud admin portal's left navigation bar, scroll down and click **Settings**, then navigate to the page whose settings you want to reset.
2. Click the **Reset to defaults** button in the upper right of the page.



A confirmation dialog box opens.

3. Click **OK**.  
The settings on the page are set back to their default settings.

### To return to default settings for all options on the Settings pages:

1. In the FileCloud admin portal's left navigation bar, scroll down and click **Settings**. Then, on the **Settings** navigation page, click **Reset** . The Reset page opens.
2. Click **Reset All Settings and Customizations**.

## Reset

Globally reset all settings and customizations

Do you wish to reset all settings and customizations?

Reset All Settings and Customizations




A confirmation dialog box opens.

Warning ✕

Reset settings and customizations to defaults for all user?

Confirm and continue with reset?

Reset Cancel



3. Check **Confirm and continue with the reset**, and click **Reset**.  
All of the options that appear on the Settings and Customization pages are reset to their defaults.