VISIBLE-SYNC

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Getting Started

eLearning Interactive Training

System Requirements

Desktop Client Requirements

The desktop client is compatible with the following operating systems:

Microsoft Windows	macOS
Windows Vista	Mavericks v.10.9 (64-bit only)*
Windows 7	Yosemite v.10.10 (64-bit only)*
Windows 8	El Capitan v.10.11 (64-bit only)*
Windows 8.1 (including Surface Pro)	Sierra v.10.12 (64-bit only)*
Windows 10	
Windows 2008 Server	
Windows 2012 Server	
Windows 2012 Server R2	
Windows Server 2016	

* Only 64-bit OSX machines are supported.
* Please note, there is currently a known issue with the 2.6.X agent on MacOS 10.9.5 and the agent may not function as expected on this OS build. It is recommended that either the OS be updated to 10.10 or higher, or alternatively, an unsupported 2.5.4 build may be installed. We are continuing to work to address all known issues here. Other MacOS 10.9 and 10.8 builds are not impacted.

Minimum system requirements are as follows:

Hard disk:	35 mb for installation
RAM:	256 mb
CPU:	1 Ghz single-core or better

Web Browser Requirements

The browsers listed below have been explicitly tested for support. Other browsers with HTML 5 support MAY work but are not supported with this application.

- Internet Explorer 8+

- Chrome 12+
- Firefox 13+
- Safari for 6 & 7 OS X, version 5.2.7 for Windows

> ℹ **Note:** If you are using an older browser that does not fully incorporate HTML 5 (such as IE 8/9), we recommend you have Flash installed.

Mobile Devices

- Apple iOS 8+
- Android 2+
- Windows Phone 8+

Microsoft Outlook Add-In Requirements

The Outlook add-in can be installed in Microsoft Outlook versions 2010+ (Windows 32-bit and Windows 64-bit environments) with .NET 4.7.1 version or higher. Microsoft Outlook for Mac does *not* support third-party add-ins.

> ℹ **Note:** This feature is not supported for Microsoft Outlook installed on Mac operating systems. Microsoft Outlook installed on Mac operating systems does not allow for the installation of add-ins.

Logging In to the Web Portal

When a user account is first created for you, you will receive a *Welcome* email from your administrator, providing you with important information to help you get started using the system. For example, your email might include a link to the web portal, a username (or an email address), and a password.
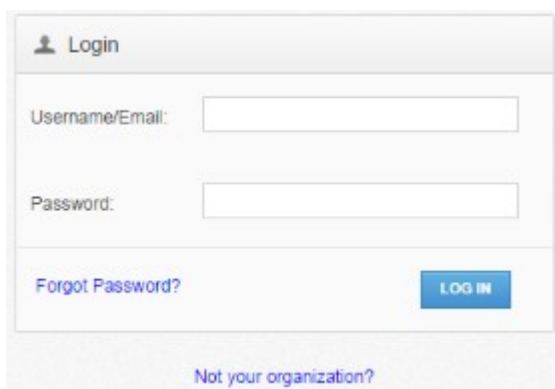
1. Navigate to the URL listed in your email (for example, http://sync.visible-it.com).

ℹ️ Your organization may have a custom URL for accessing the web portal. Regardless all customers can access the system at the URL shown above.

2. Enter your email address and password.

ℹ️ If your organization uses Active Directory your password will be the same as your network password (used to log in to your computer). If you are in a "Workgroup" environment you will have been provided a password in the welcome email.

3. Click the Log In button.

👤 Login

Username/Email: [   ]

Password: [   ]

Forgot Password?   LOG IN

Not your organization?

You now have access to the system.

Installing and Configuring the Desktop Client

Overview

End users can access their files, folders, and shared content from a multitude of end points, including the web portal, a mobile device, or their desktop client. This article describes how an end user can install and register the Anchor desktop client (Synced Tool) on a local machine. It also provides instructions and best practices for using the desktop client, updating the desktop client, and managing preferences.

Supported MacOS and Windows Versions

For information on supported MacOS and Windows versions, please reference the [System Requirements](link) article.
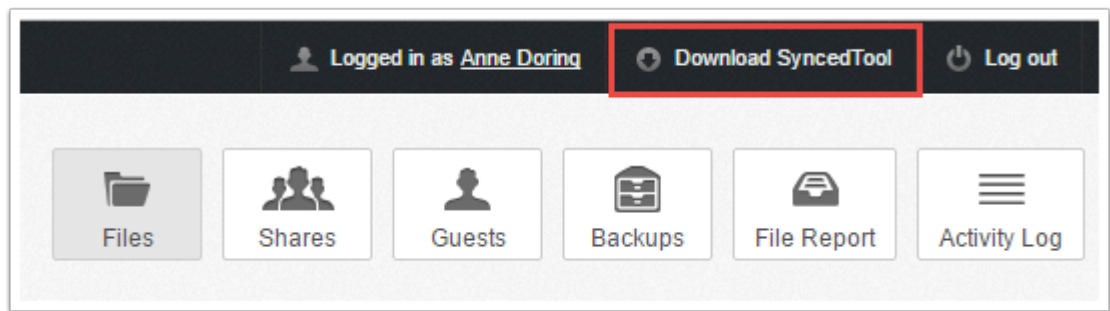
Instructions

Logging In

For information on logging in to the web portal, please reference the [Logging In](link) article.

Installing the Desktop Client

1. Click the Download button in the web portal.

The *Download* page displays.

2. In the Download page, click either the Windows Desktop Client button or the Mac Desktop Client button. The selected file will start to download, or you will be prompted to save the file, depending on your browser settings.

3. When the file finishes downloading, click the installation file to launch the Setup Wizard.

4. Select your language and click the OK button to continue.
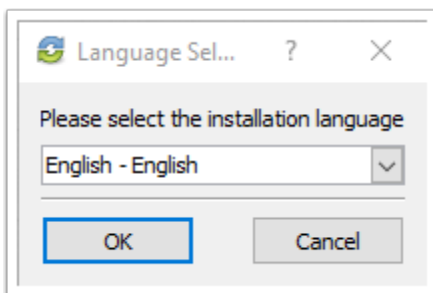
5. Click the Next button to start the Setup Wizard.
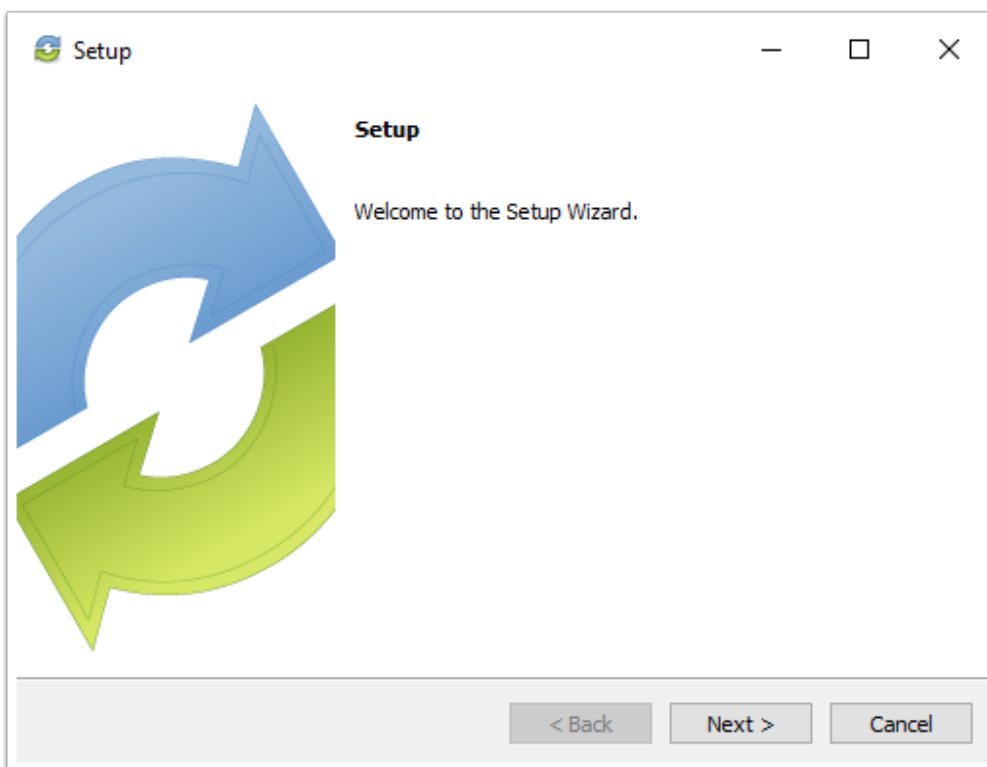
6. In the License Agreement page, click to accept or not accept the agreement. To continue with the installation process, you must accept the agreement. Click the Next button to continue.
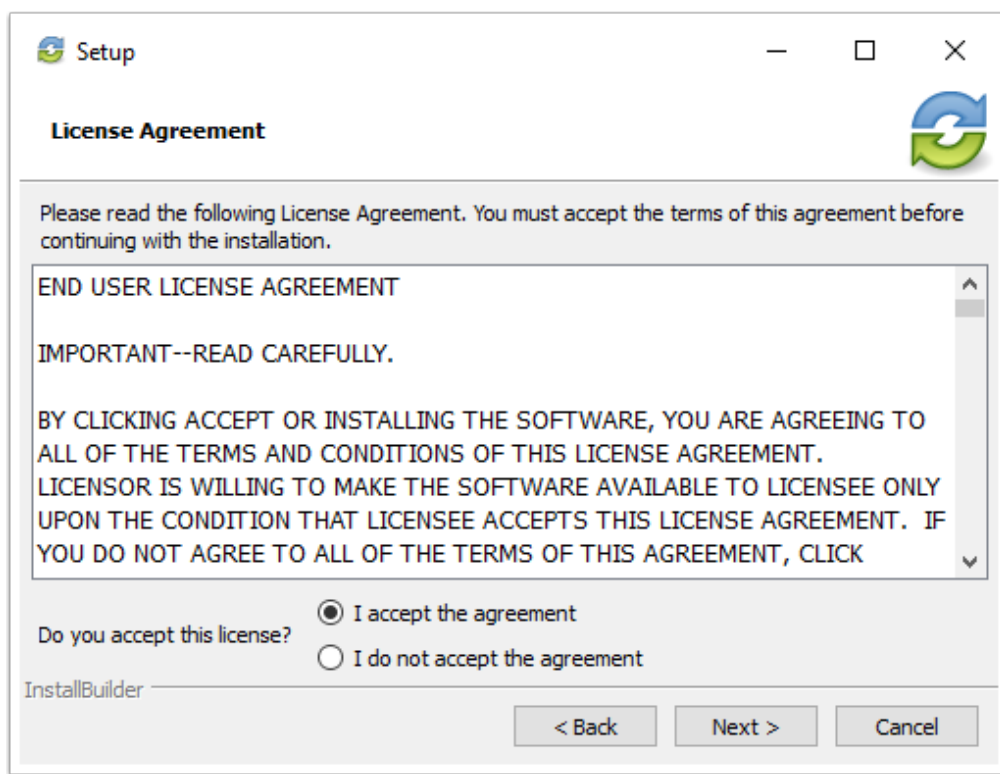
7. Specify the directory in which you would like to install Synced Tool. In most instances, you can accept the default installation directory. Alternatively, manually input a new directory or click the Folder icon to select a new directory on your local machine.
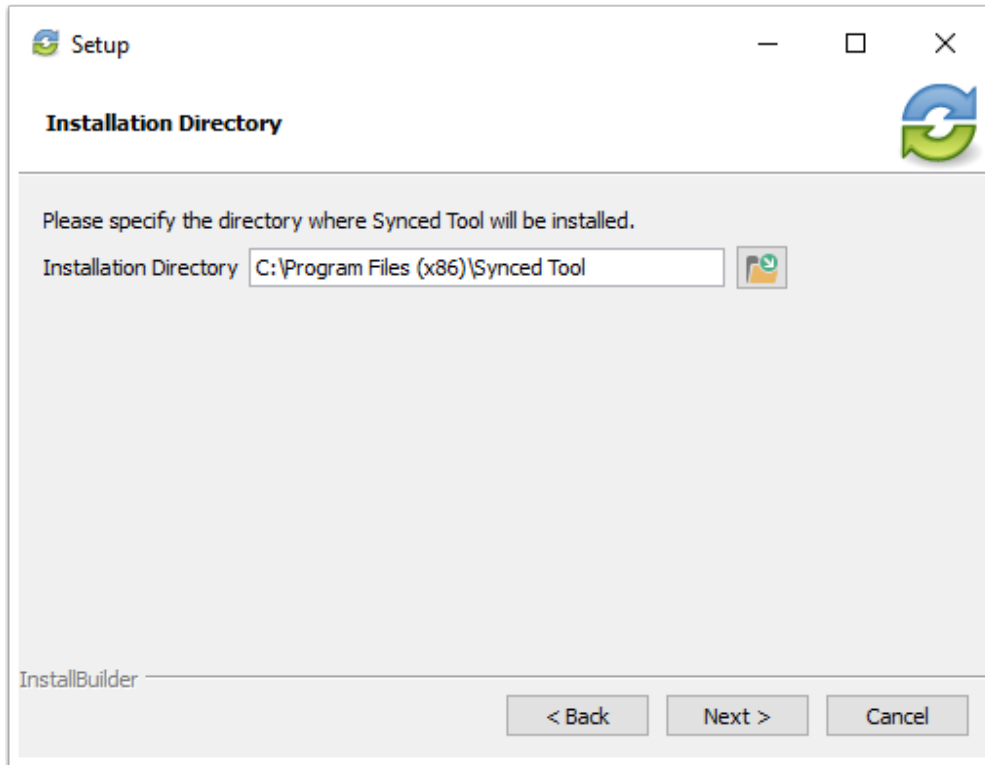
8. You are now ready to begin the installation process. Click the Next button to start the installation process.
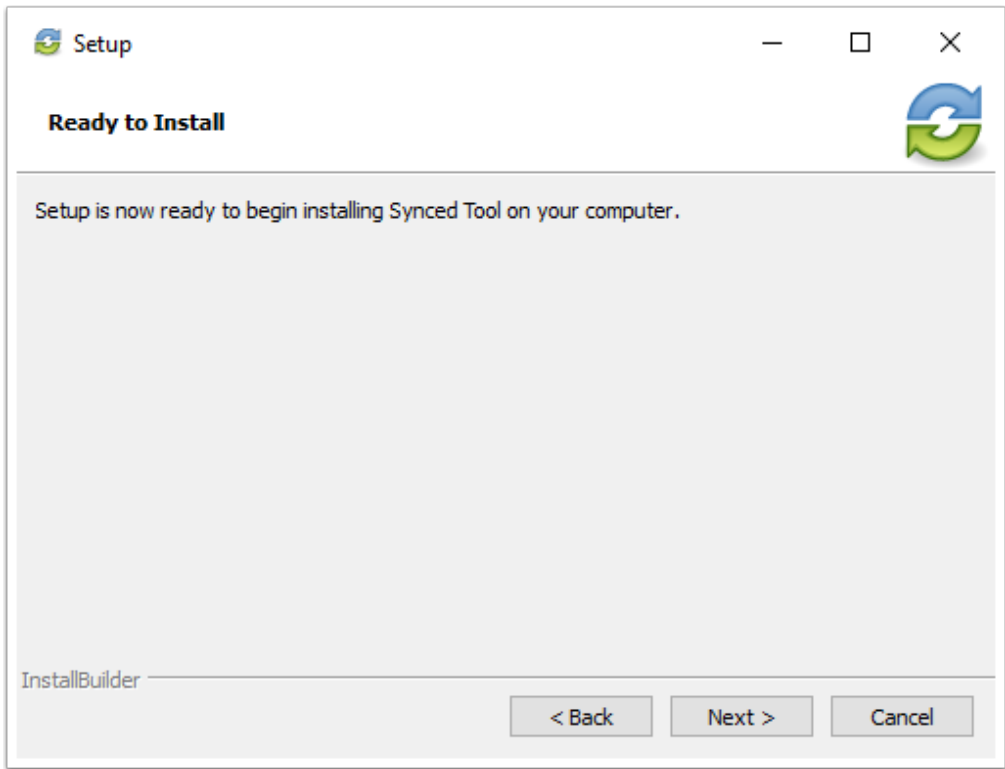
9. When the installation is complete, you can optionally choose to create a shortcut. Click the Finishbutton when you are done.

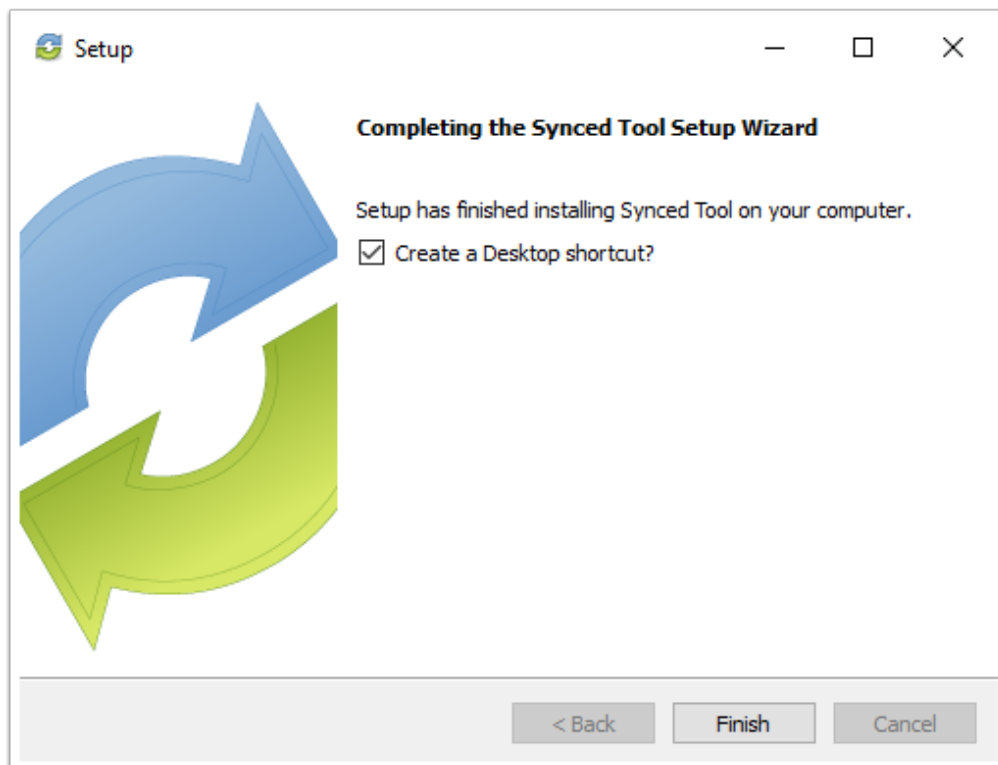Now that Synced Tool has been installed, it must be registered to a user account.
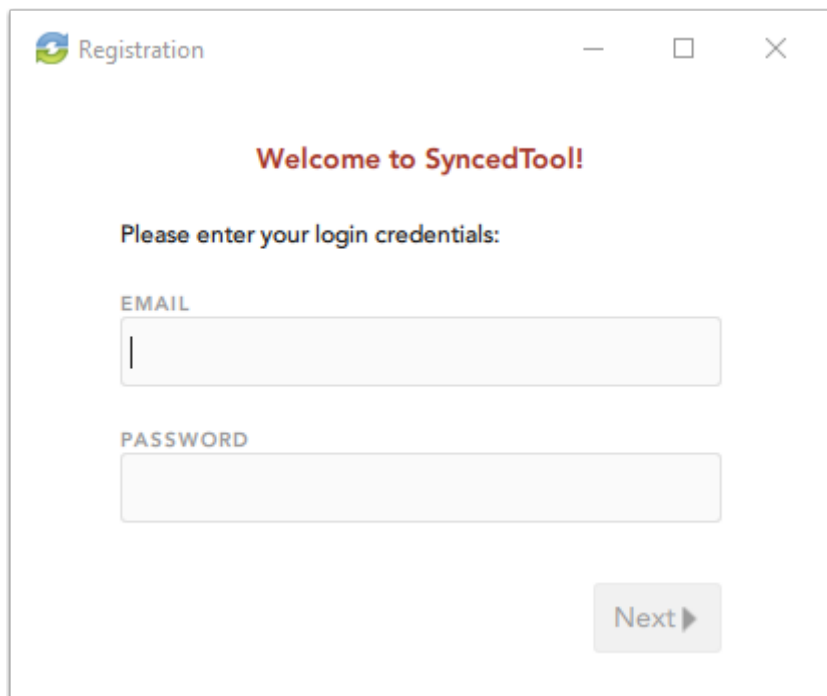
> ℹ Note: Guest accounts cannot register the desktop client.

Registering the Desktop Client

1. After the Setup Wizard completes, the Registration Wizard will automatically launch. Alternatively, click the system tray icon and select Register. The Registration Wizard displays.

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

2. In the Registration screen, enter the email address and password provided by the Welcome email and click the Next button to continue.

If your organization uses Active Directory your password will be the same as your network password (used to log in to your computer). If you are in a "Workgroup" environment you will have been provided a password in the welcome email.

3. In the Select Destination of Folder screen, choose either a typical or advanced installation path, where all files, folders, and shares can be accessed on your local machine.

In most instances, you can select **Default**, and you will be able to access your synced folder in the following location: *C:\Users\[User Name]\VIT-Sync Enterprise.*
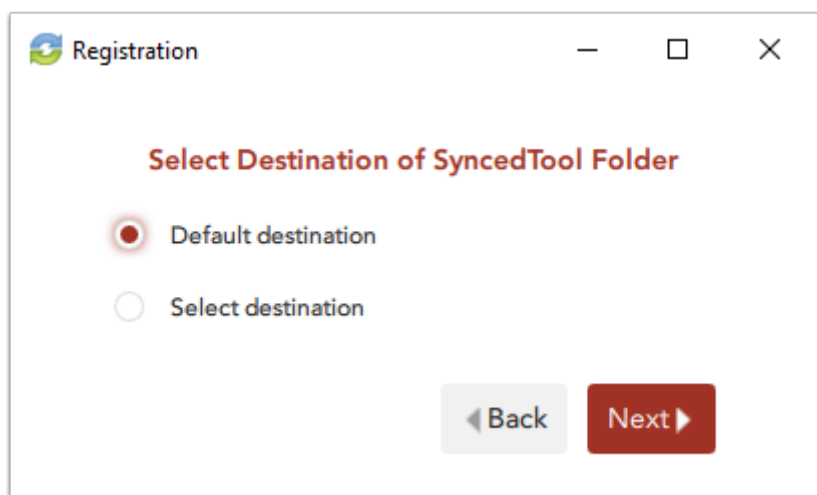
- Alternatively, you can specify a custom area where Synced Folder can be accessed.
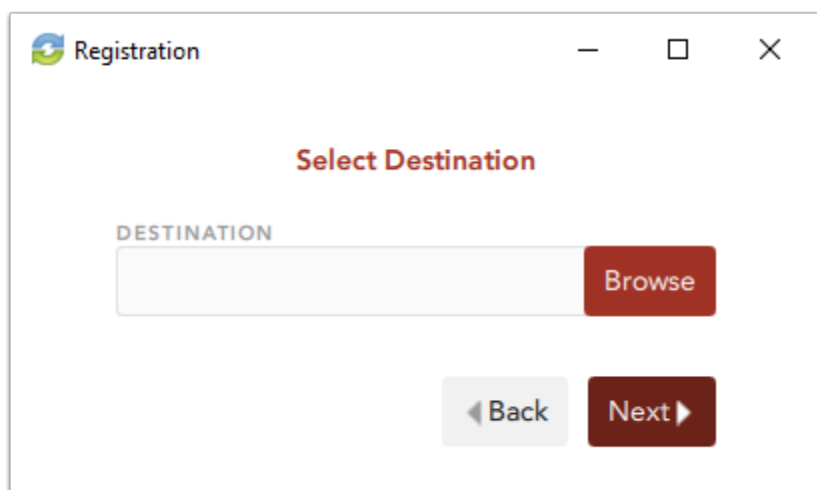
> 💡 **Best Practice:** When selecting a Synced Folder location, do not select an external drive. Desktop clients install on an external drive can unregister unexpectedly, and might lead to data loss.

4. If you have previously installed Synced Folder using the same settings, you will receive a warning message indicating that a folder already exists. Click the Merge button to merge with the existing folder, which saves time during the resyncing process.
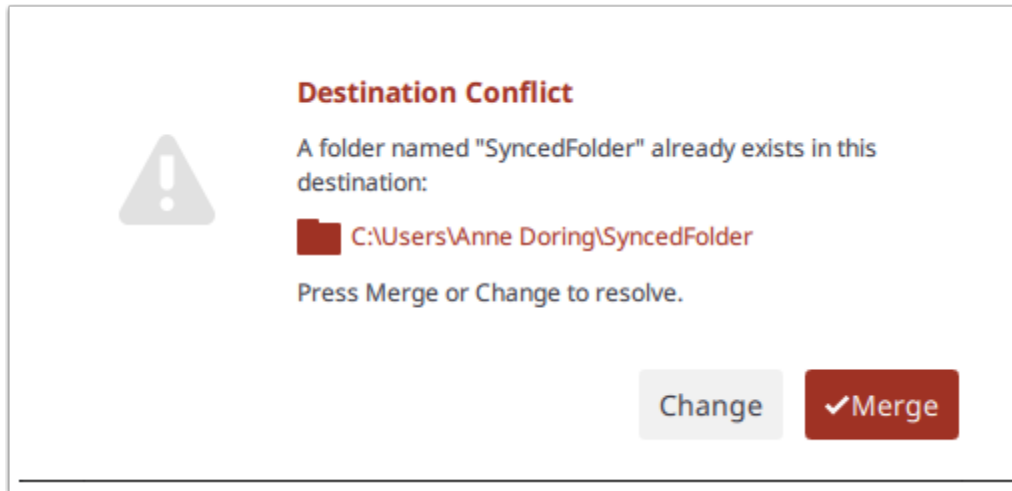
5. In the Choose Folders for Selective Sync screen, click the Select what to sync to this device nowradio button to deselect content that you do not want on your local machine.

For instructions, please reference the [Using the Selective Sync Feature](#) article.
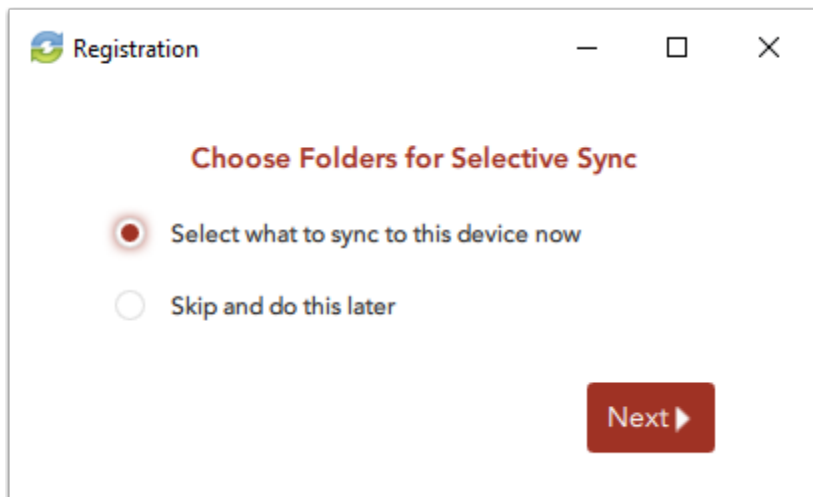
6. Click the Next button to continue, and then click the Finish button when the wizard completes.

> ⚠️ **Important:** You must restart your computer to complete the installation or upgrade process.

Using the Desktop Client

> ⚠️ **Important:** You must restart your computer to complete the installation or upgrade process.

By default, your synced folder is located at *C:\Users\[User Name]\VIT-Sync Enterprise*. Your synced folder is also listed under the Favorites menu in Windows Explorer.
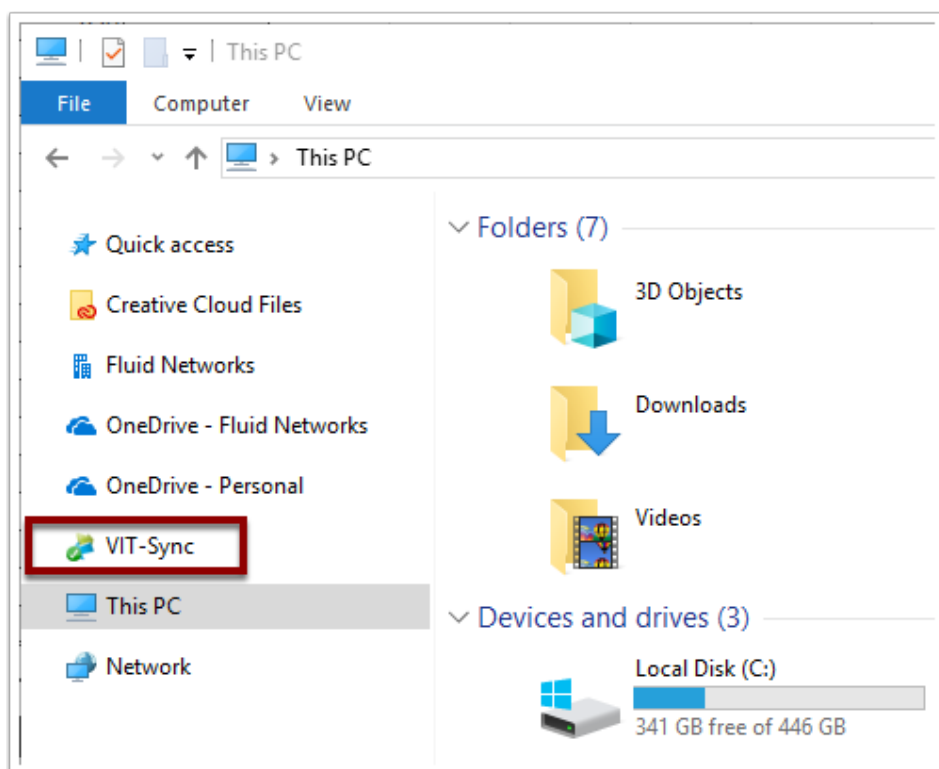
The desktop client utilizes icons to indicate new and updated files or folders, including:

Managing Preferences

1. Click the system tray icon, click the Manage icon, and select Preferences.
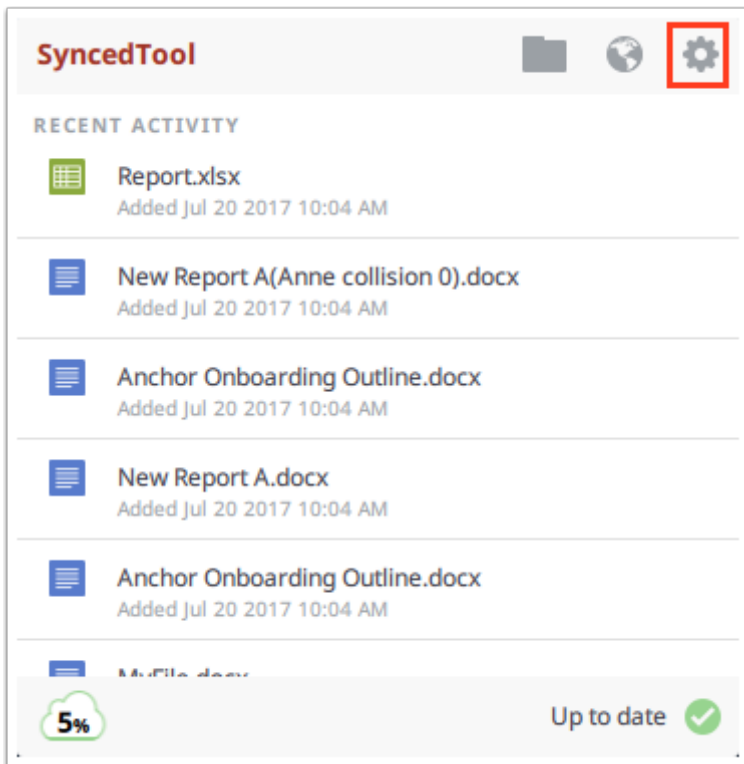
The *Preferences* dialog box displays, showing the *Overview* tab.
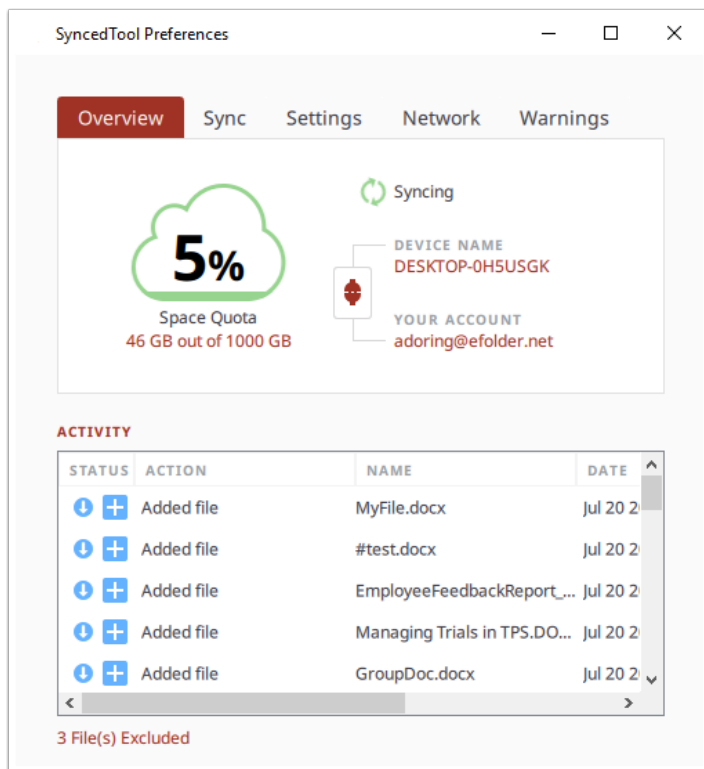
> ℹ️ **Note:** Depending on individual graphic card settings, the *Preferences* dialog box might not render as expected.

2. In the Overview tab, you can view or change the following information:

1. The current state of the sync process, including whether the files are up to date, pending sync, or currently syncing
2. The total amount of space quota available and the total amount of space used
3. The device name and the device account information
4. The *Unregister* button, which unregisters the desktop client
5. The *Activity* area, which lists the status of uploaded and downloaded files, as well as a notification of excluded files, which links to details about each exclusion
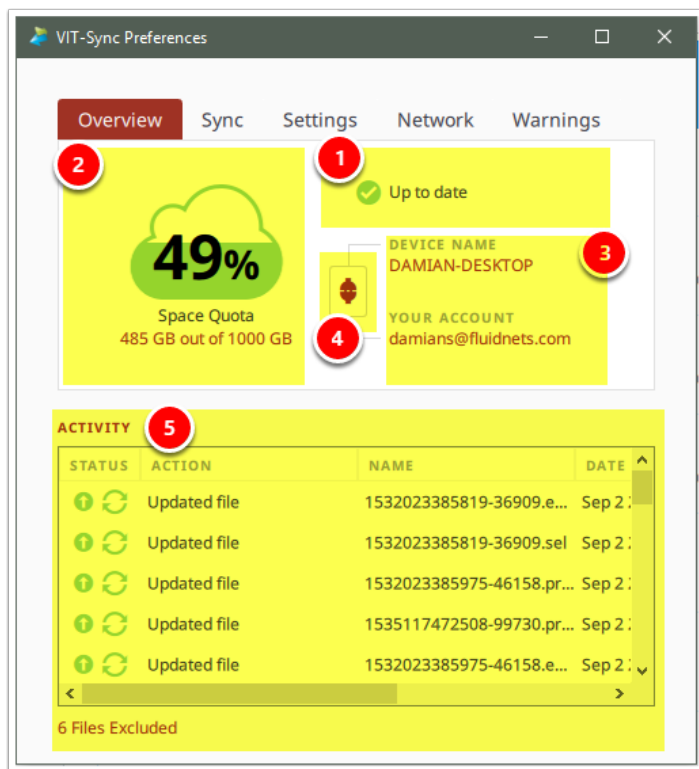
3. Click the Sync tab to select and deselect the Team Shares, personal folders, and subfolders that you do not want available on your local machine. You can also use the arrow buttons on your keyboard to navigate this screen.

For more information, please reference the Using the Selective Sync Feature article.
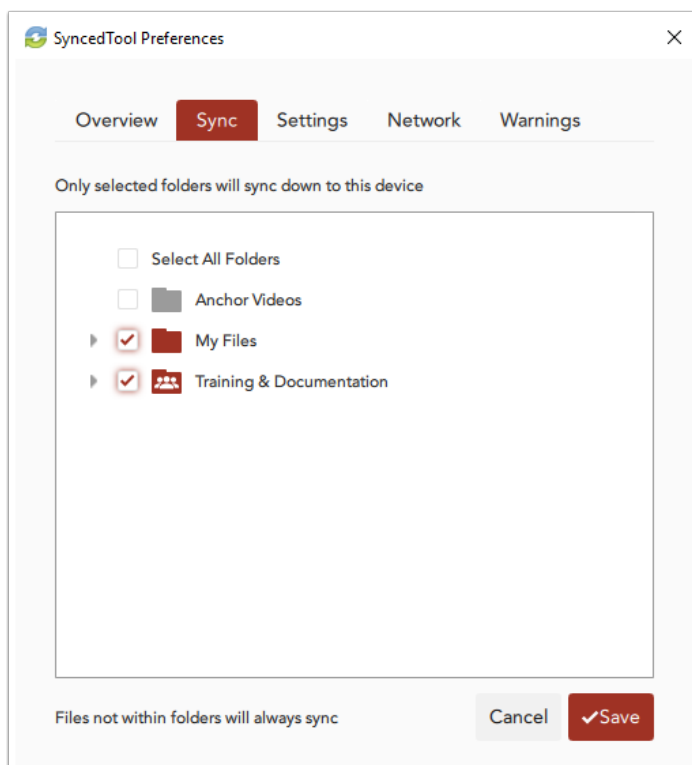
4. Click the Settings tab to specify language, locking, and remote browsing settings. For example:

1. Click the **Language** drop-down menu to select your preferred language. You can also use this section to hide or show the system tray icon and notifications.
2. In the *File Locking* section, click the **Auto Locking** drop-down menu to set your preferred auto-locking preference. If your administrator has turned on the Auto-Locking for Word and Excel feature for a Team Share, you can decide to automatically lock, never lock, or receive a prompt each time you open a Word or Excel file in a Team Share.
3. In the *Privacy* section, click the **Disable Remote Browsing** checkbox to prevent administrators from remotely browsing the contents of your Synced Folder (for example, to create a backup of your local folders).

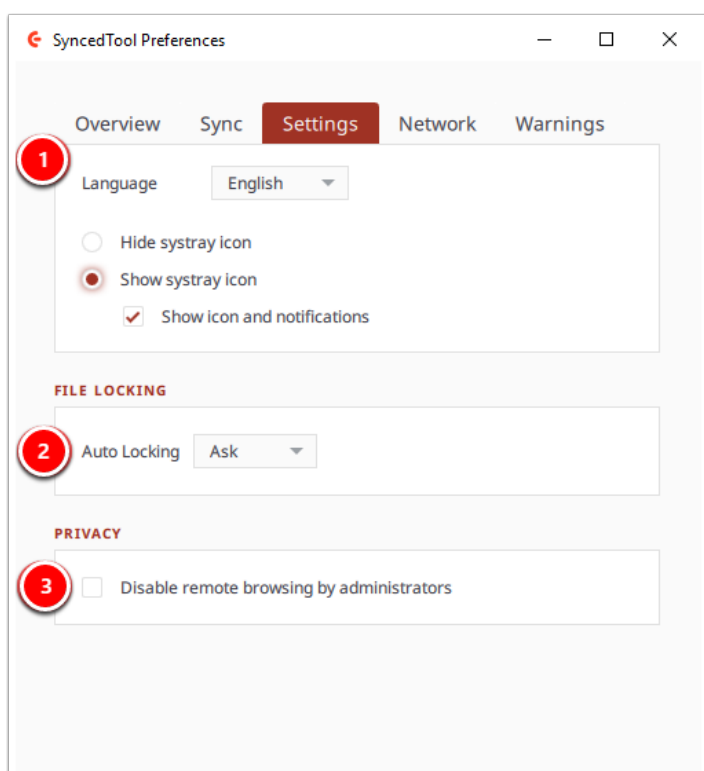## 5. Click the Network tab to manage LAN Sync, bandwidth, and proxy settings. For example:

1. If you are working within a Local Area Network (LAN), click the **Enable LAN Sync** check box to turn on the LAN Sync feature. LAN Sync refers to a file synchronization approach that accelerates the sync process when a shared file already exists on a LAN.
2. Use the *Bandwidth Throttling* section to configure bandwidth settings; you have the option to set a specific limit, or decide not to limit bandwidth. Please note that these settings might change based on administrator settings.
3. Click the **Proxies** drop-down to configure proxy settings for your network. You can select from:
   - No proxy

- Detect Automatically, which autodetects proxy settings from your system or network
- Custom, which allows you to apply custom proxy configurations if you are unable to automatically have the system detect your proxy server settings

> ⚠️ **Enable LAN Sync** should only be used where there is a slow internet connection or if there is a large transfer such as a new file server. The communication and transaction requirements often take longer than simply letting a new agent sync directly to the cloud.
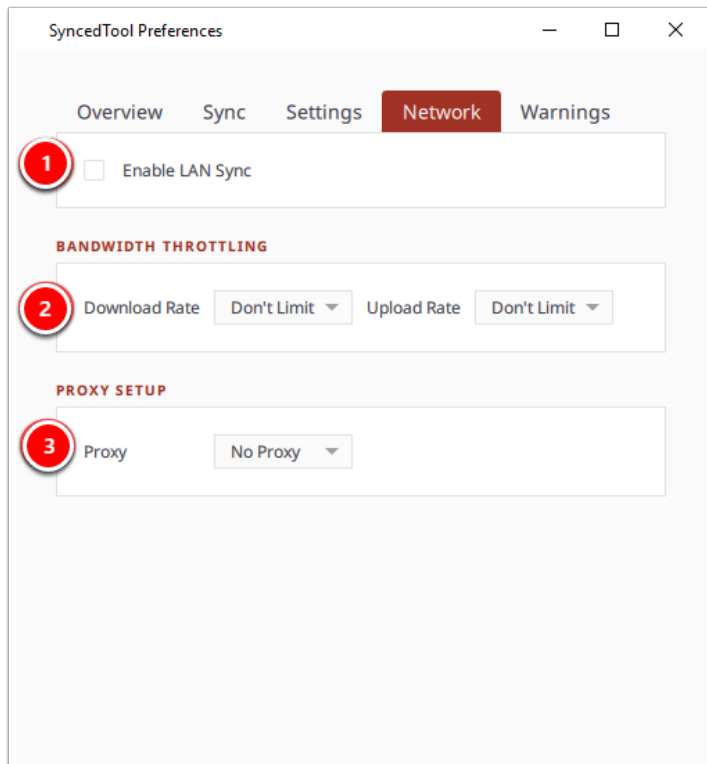
6. Click the Warnings tab to view a list of file sync warnings including conflicts.

For more information on how to resolve file sync warnings, please reference the Manually Resolving a File Sync Warning article.
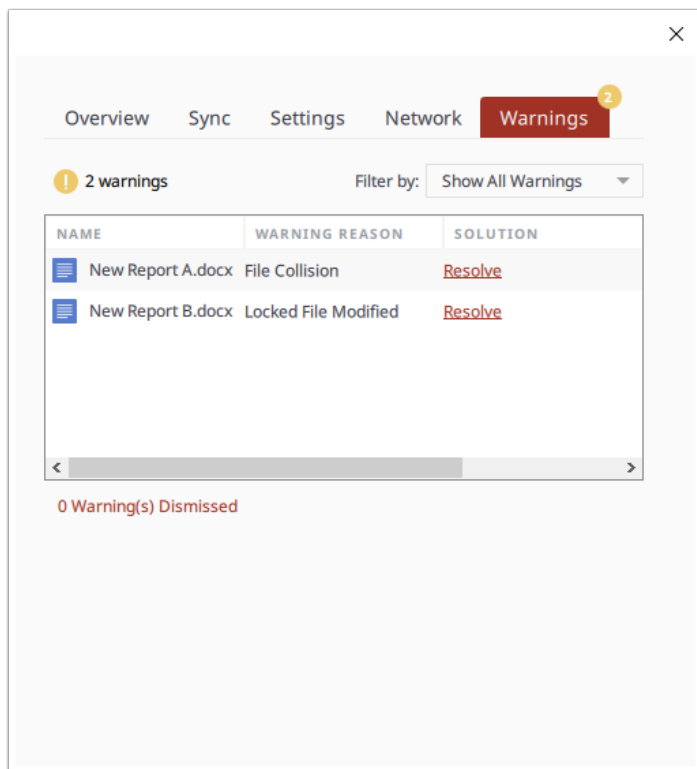
Viewing Warning Messages

Warning messages captured in the Warnings tab also display in the system tray menu. To view a summary of these indicators, click the system tray icon and reference the system tray menu.
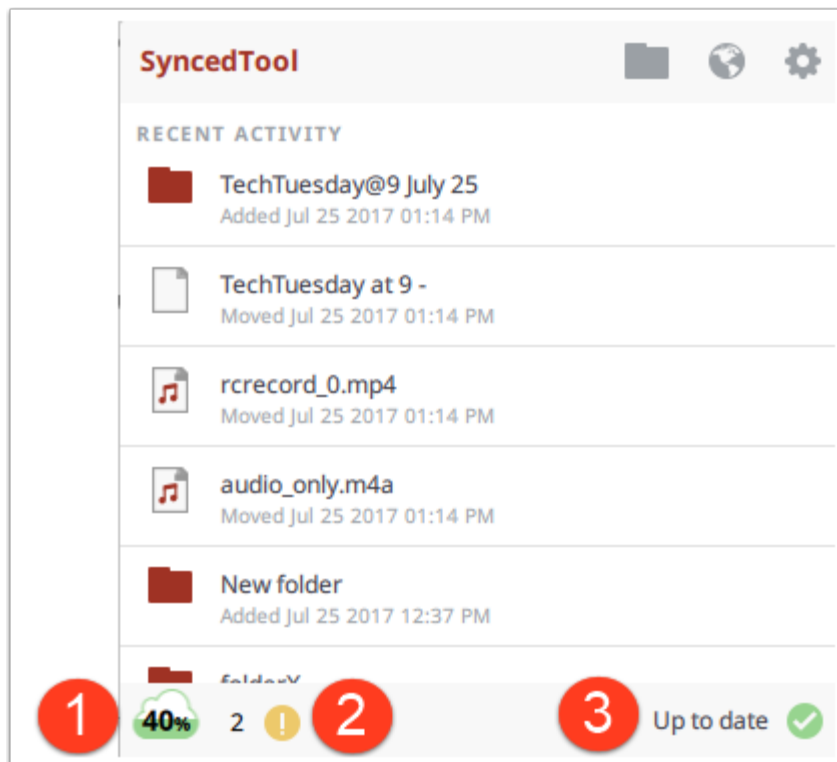
1. The *Space Quota* indicator message displays the amount of space you are currently utilizing.
2. The *Sync Warnings* indicator activates when a file sync warning—such as a collision or a locked file revision—occurs on your local machine. When this indicator is active, click to resolve the file sync warning.
3. The *Status* indicator displays the progress of the sync process. This indicator will alert you when the sync process is up to date, syncing, paused, or disconnected. You can also hover over this indicator to enable pause and resume functionality.

Mobile Apps

Downloading Mobile Apps

Overview

You can manage your files and folders from various mobile apps, including the Android app, the iOS app, or the Windows Phone app. You can find and download your device-specific app in the following locations:

- For Android users, search for *Synced Tool* in Google Play
- For iOS users (for example, iPhone or iPad users), search for *Synced Tool* in the App Store
- For Windows Phone users, search for *Synced Tool* in the Windows Phone site

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

Resources

- For more information about using the Android app, please reference the [Using the Android App](#) article.
- For more information about using the iOS app, please reference the [Using the iOS App](#) article.
- For more information about using the Windows Phone app, please reference the Using the Windows Phone App article.

Instructions

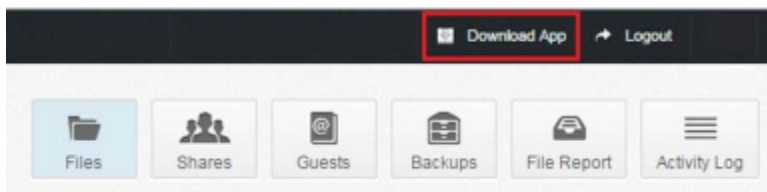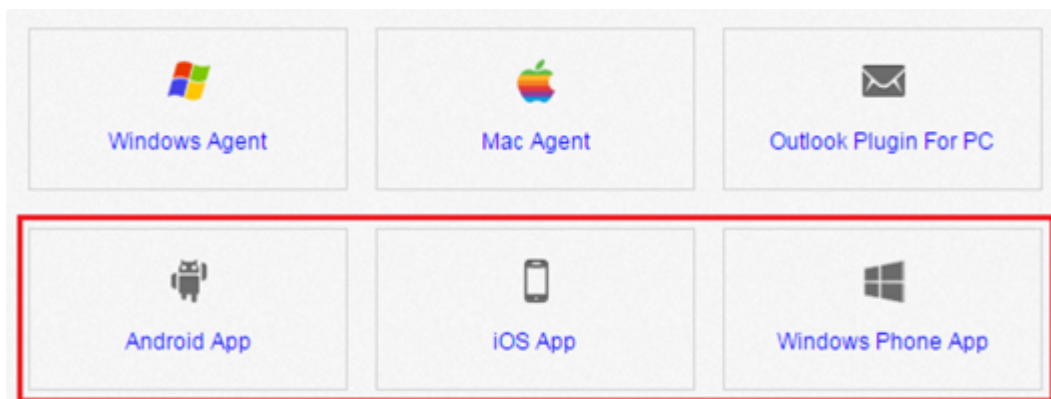To find your device-specific app:

1. Log in to the web portal

[Click here to learn how to log in to the web portal](#)

2. Click the Download App button in the web portal.

The Download page displays.

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

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

Using the Android App

Quick Video

Overview

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

- View, rename, delete, and move content
- Upload content from your device
- Easily edit Microsoft Office content
- Lock files and folders
- Share files and folders (including secure shares)
- Automatically back up your photo gallery to a synced folder, called Camera Uploads
- Pin and unpin files and folders, so that you can control the amount of data that is fully downloaded to your device

Instructions

Prerequisite

You will need to install the SyncedTool App before proceeding. Please read the Downloading Mobile Apps article for information on installing software on your device.

Logging In

1. In your Android device, press the app icon to launch the app. The Login screen displays, prompting you to enter your login credentials.

- In the *Host* field, enter the **host name** of the system (vitsync.syncedtool.com)
- In the *User* field, enter your **email address** (for example, user@mail.com).
- In the *Password* field, enter your **password.**
- Press the **Sign in** button when you are finished.

ℹ️ Your organization may have a custom URL for accessing the web portal. Regardless all customers can access the system at the URL shown above.

ℹ️ If your organization uses Active Directory your password will be the same as your network password (used to log in to your computer). If you are in a "Workgroup" environment you will have been provided a password in the welcome email.

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

3. If Two-Step Authentication has been enabled as an organization policy, you will also be asked to configure a PIN after the initial registration process.

> ℹ️ If Two-Step Authentication has been turned on only as an individual account policy, that account will not be required to configure a passcode.

You will be directed to the *Settings* page. Select **Require PIN**.

You will be prompted to enter a **PIN**.
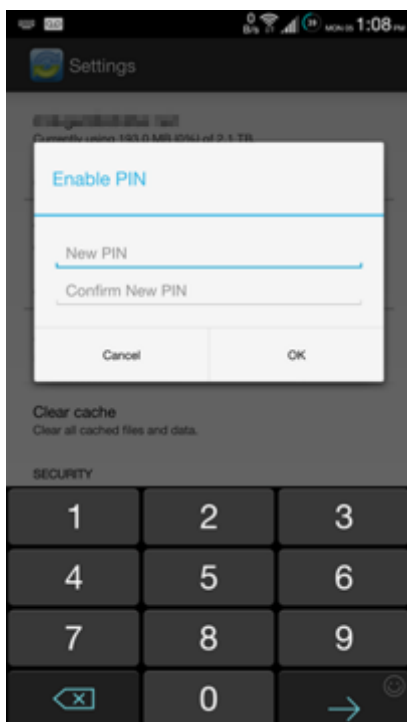
When accessing the mobile app in the future, you will be prompted to first enter this PIN.

Navigating the Android App

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

1. Press the My Files link to view and manage your files and folders; you can rename, move, or pin an item for offline viewing.

2. Press the Recent Files link to view your most recent files.

3. Press the Offline Files link to view a list of pinned files that can be viewed offline.

4. Press the Backups link to view a list of your backups.
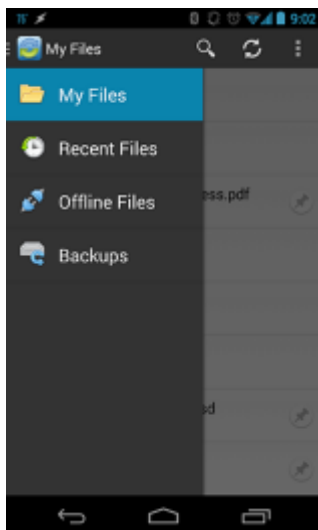
Viewing Files in the Web Preview Tool

You can view files using the Web Preview tool, which gives you the ability to preview content without fully downloading it to your mobile device. In this way, you can review content without utilizing mobile resources.

1. Press the My Files link. The My Files screen displays.

2. In the My Files screen, find the file that you want to view.

3. Press the Preview icon.
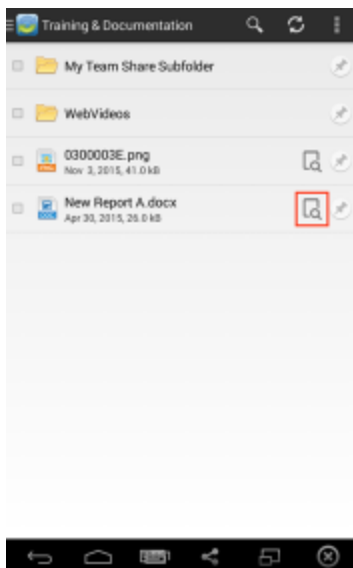
The file opens in the Web Preview tool, allowing you to review content without utilizing mobile resources.

Locking Files and Folders

Optionally, you can lock a file or folder. Locked files and folders will be honored across all linked devices.

1. Press the My Files link. The My Files screen displays.

2. In the My Files screen, select the file or folder within the Team Share that you want to lock.

3. In the top right-hand corner of the screen, press the more options button, and then press the Locklink.
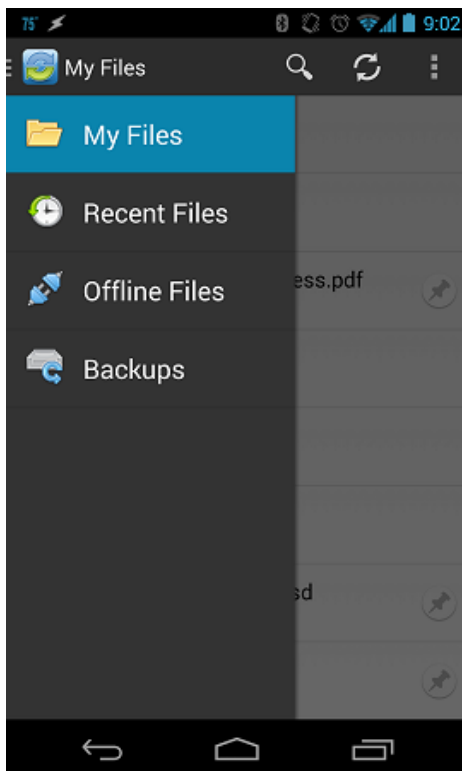
The file is now locked.

Editing Files

To edit content in your mobile app, you must first install a third-party editing tool. To edit content in your mobile app, you must first install a third-party editing tool. These instructions refer to Microsoft mobile apps (Microsoft Word app, Microsoft Excel app, and Microsoft PowerPoint app). You can download these tools at no cost. To use these tools for editing purposes, you must first create a free Office 365 account.

1. Download the Microsoft Word app, Microsoft Excel app, or the Microsoft PowerPoint app, depending on your needs and preferences.

2. With the Microsoft app installed, press the appropriate file that you want to edit.
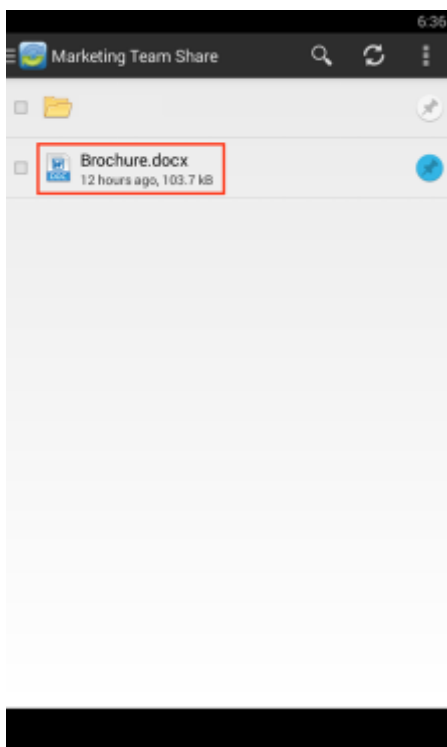
3. The file will open in the Microsoft app, and will prompt you to sign in to your Office 365 account, if you are not already signed in. Press the Sign In button.

4. The Office 365 Sign In page displays, asking you to either sign in or create a new account.
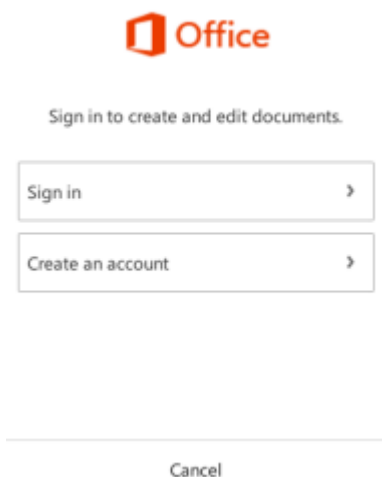
5. When you are finished signing in, the file will display in the Microsoft app. Use the toolbar to edit the file as appropriate.

6. Save your file when you are finished. The file will synchronize immediately.

Sending Share Links

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

1. Press the My Files link. The My Files screen displays.

2. In the My Files screen, select the file or folder that you want to share, and press the Share button.
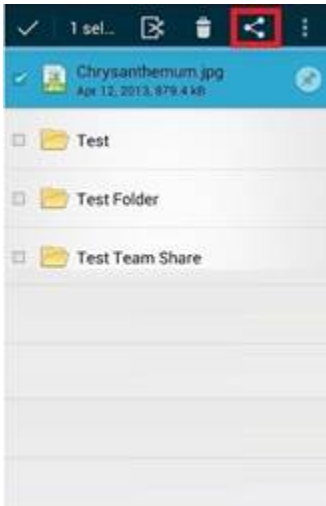
3. In the Choose a share type window, select Public share to send a standard share. Alternatively, select Secure share to send a secure share, which will require the recipient to log in before he or she can access the shared item. Press OK to confirm your selection.

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

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

Backing Up Your Camera Gallery

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

1. In the Settings page, press the Enable Auto Backup option.

2. Press the Settings button. The Settings page displays.

3. Press the Back Up Photos option to configure settings for backing up photos in your photo gallery:

- Select **Never** if you don't want to back up your photos.
- Select **Over Wi-Fi Only** to back up photos only when you are connected to Wi-Fi.
- Select **Over Wi-Fi or Mobile Network** to back up your photos whether you are connected to Wi-Fi or on your mobile network. Please note that uploading over your mobile network will use your data connection, and charges from your service provider may apply.

**4. Press the Back Up Videos option to configure settings for backing up videos in your photo gallery:**

- Select **Never** if you don't want to back up your videos.
- Select **Over Wi-Fi Only** to back up videos only when you are connected to Wi-Fi.
- Select **Over Wi-Fi or Mobile Network** to back up your videos whether you are connected to Wi-Fi or on your mobile network. Please note that uploading over your mobile network will use your data connection, and charges from your service provider may apply.

5. Press Back Up Now if you want to back up your photos and videos immediately, if allowed by your connection settings configured above.

Pinning Files

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

1. In the My Files screen, select the Pin button next to the file or folder that you want to download to your device. If you pin a folder, all if its files will be pinned as well.
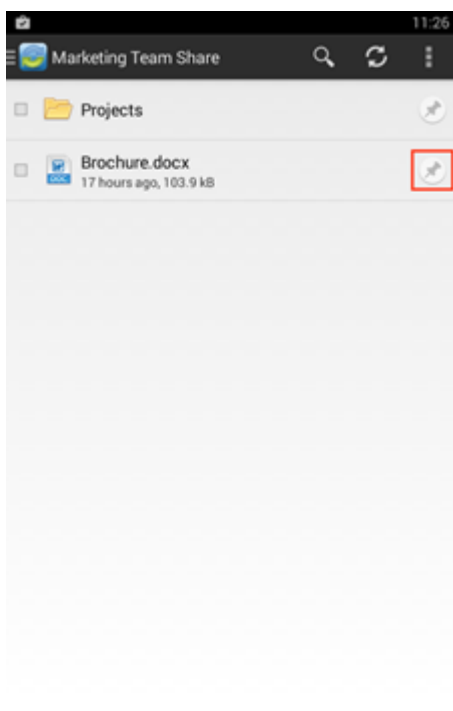
When you unpin a file, it will remain on your mobile device until your cache is cleared. You can manually clear your cache through the *Settings* screen.

Represents a pinned file

Represents a downloaded file; the file will remain on the device until the cache has been cleared

Represents an unpinned file

Using the iOS App

Quick Video

Overview

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

- Create new files and folders
- Open and view files and folders
- Edit files
- Lock files and folders
- Share files and folders
- Send secure shares of files and folders
- Upload content from your device, such as photos
- Automatically back up your camera roll to a synced folder, called Camera Uploads
- Rename, delete, and move items
- Favorite items for offline viewing

Supported iOS Versions

For information on supported iOS versions, please reference the [System Requirements](#) article

Instructions

Prerequisite

You will need to install the SyncedTool App before proceeding. Please read the [Downloading Mobile Apps](#) article for information on installing software on your device.
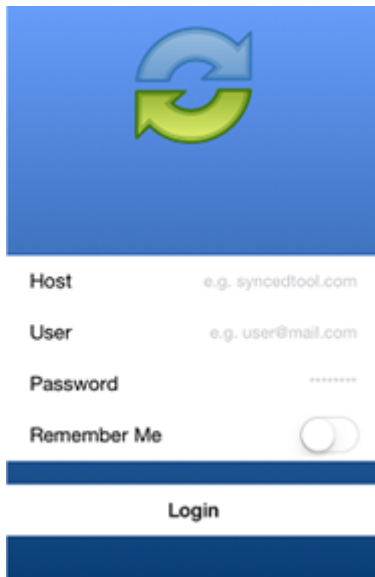
Logging In

1. In your iOS device, press the app icon to launch the app. The Login window displays, prompting you to enter your login credentials:

- In the *Host* field, enter the **host of the system** (vitsync.*syncedtool.com*).
- In the *User* field, enter your **email address** (for example, user@mail.com).
- In the *Password* field, enter your **password**.
- Press the **Login** button when you are finished.

> ℹ️ Your organization may have a custom URL for accessing the web portal. Regardless all customers can access the system at the URL shown above.

> ℹ️ If your organization uses Active Directory your password will be the same as your network password (used to log in to your computer). If you are in a "Workgroup" environment you will have been provided a password in the welcome email.
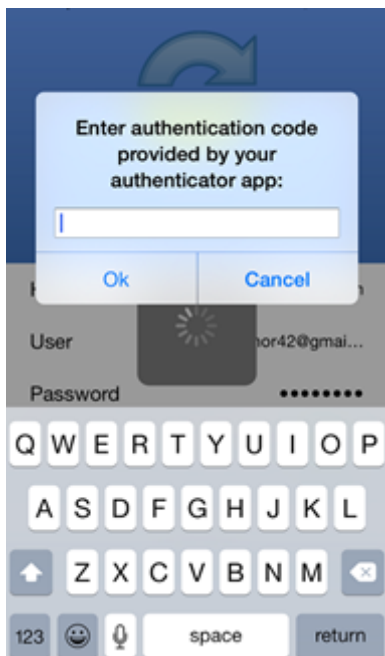
|	
Host	e.g. syncedtool.com
User	e.g. user@mail.com
Password	••••••••
Remember Me	
Login	

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

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

> **ⓘ** Note: If Two-Step Authentication has been turned on only as an individual account policy, that account will not be required to configure a passcode.

4. You will be directed to the Settings page. Select Use Passcode.
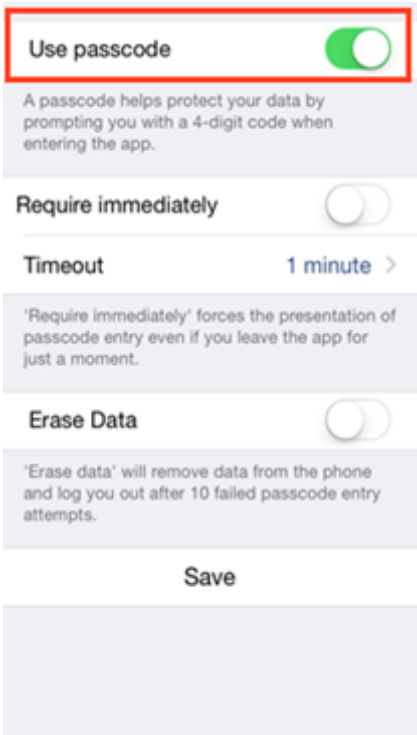
You will be prompted to enter a Passcode.
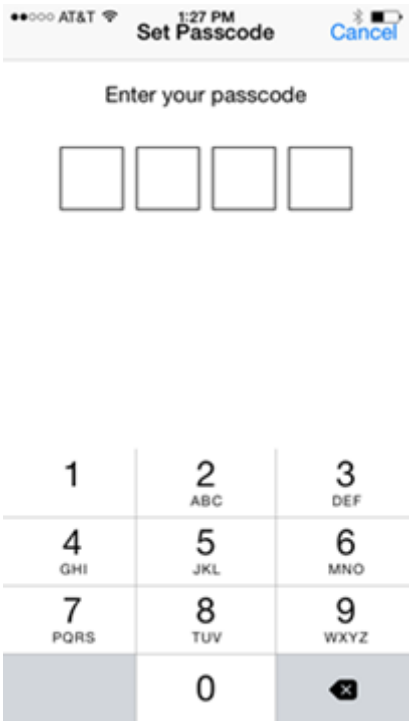
When accessing the mobile app in the future, you will be prompted to first enter this passcode.

Navigating the iOS App

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

1. Press the Files button to view and manage your files and folders; you can rename or move an item, or mark it as a favorite.

2. Press the Backups button to view a list of your backups.

3. Press the Favorites button to view a list of items that you have marked as favorites. Favorites are saved for offline viewing.

4. Press the Upload button to upload content—such as images—from your phone to the server.

5. Press the Settings button to view your account information, such as the app version, your user name, space usage, passcode lock settings, and local storage settings. You can also turn on the option to only upload content over a wifi connection.
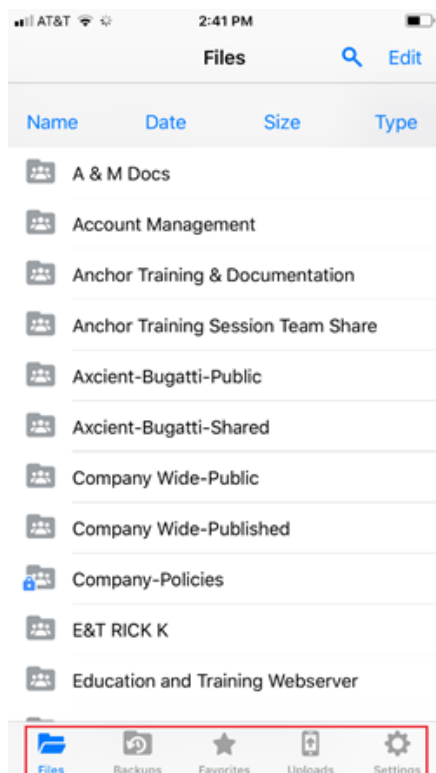
Viewing and Editing Files

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

1. Press the Files button. The Files screen displays.

2. In the Files screen, find the file that you want to view.

3. Press the title of the file. The file opens, allowing you to review content without utilizing mobile resources.

4. Press the Edit button to open the file for editing.
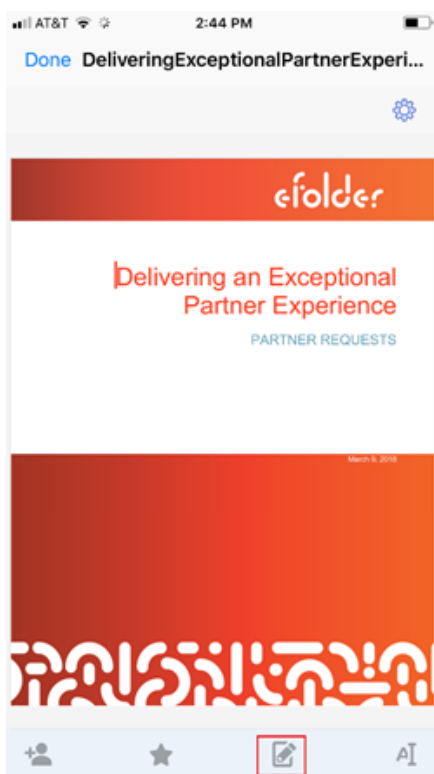
The Collaborative Web Editor opens in editing mode, allowing you to edit the file and collaborate with coauthors in real time.

Your changes will save automatically.

## 5. When you are finished, press the Done button.

For information on the Collaborative Web Editor's functionality and technical specs, please reference the How to Use the Collaborative Web Editor Knowledgebase article.

Saving Files to the iOS App

1. Open a file; for example, you might need to open a file attachment from your email application.

2. Within the file, press the Share button.
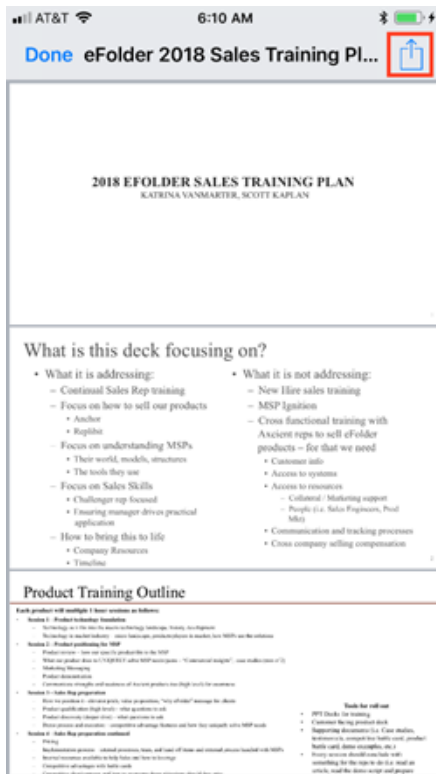
3. In the Share menu, select Save to Files.
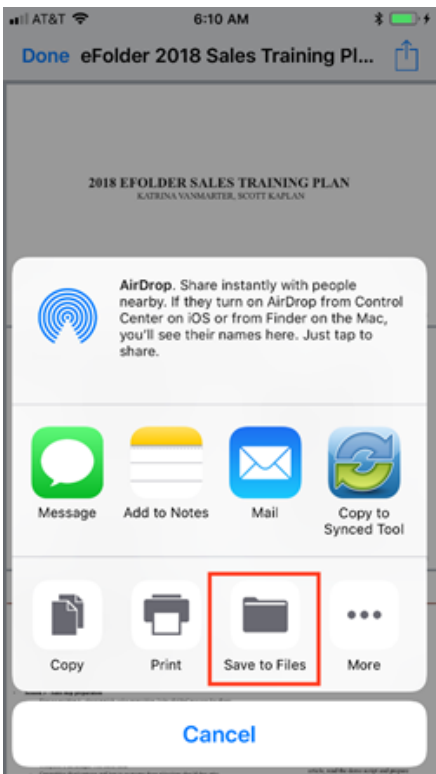
4. In the Choose Location screen, select Synced Tool.
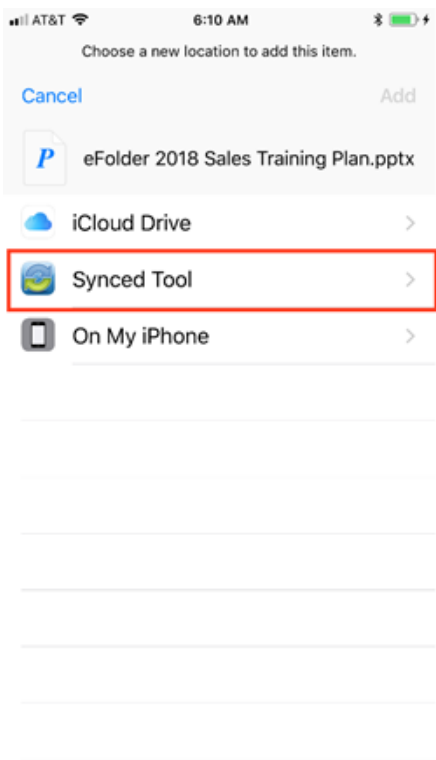
You will be prompted to select the exact location from the folder list.

Locking Files and Folders

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

1. Press the Files button. The Files screen displays.

2. In the Files screen, press the Edit link at the top right-hand corner of the screen.

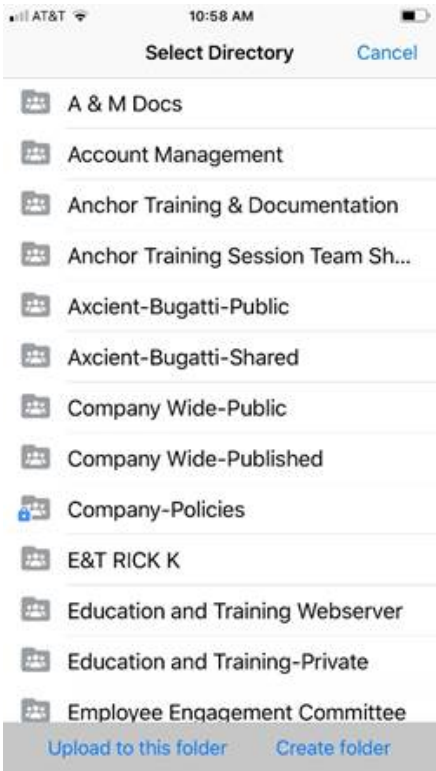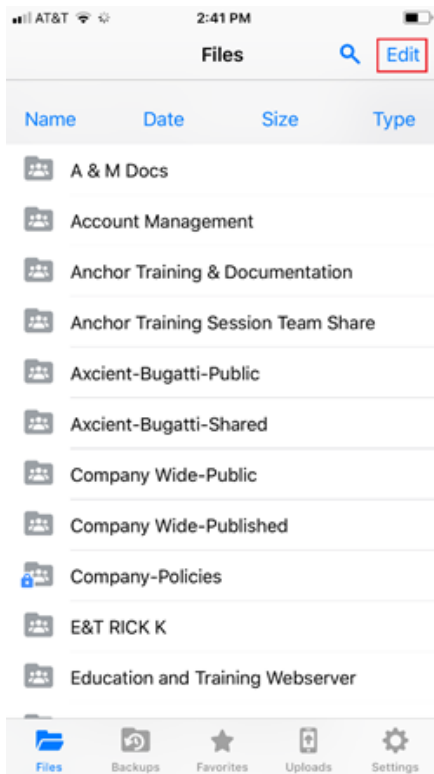3. Select the appropriate file or folder, and then press the Lock button at the bottom of the screen. The item is now locked, preventing other users from accessing your content. Locks are enforced across the web, desktop clients, and mobile devices.
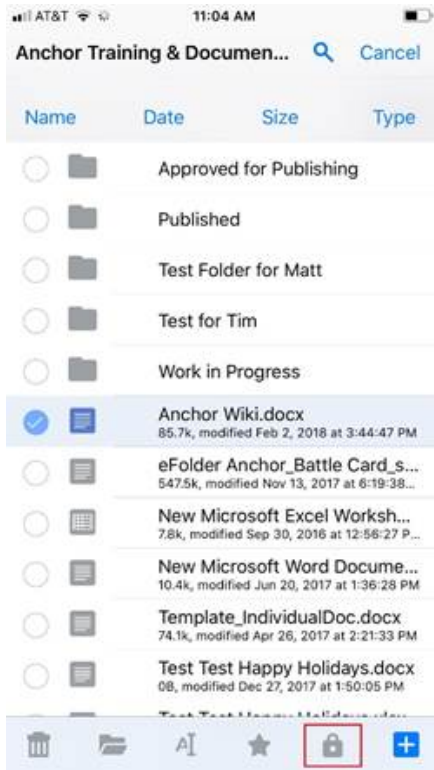
Sharing Files and Folders

You can share files and folders directly within your app. You can also send secure shares.

1. Press the Files button. The Files screen displays.

2. In the Files screen, find the file you want to share. Using your finger, slide the file to the right to reveal additional options.
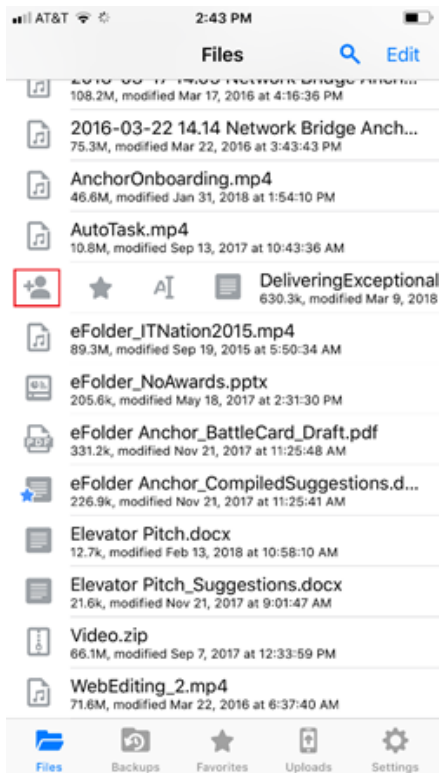
3. Press the Share button.

4. In the Share this Item menu, select from the following options:

1. Select **E-mail secure link** to send a secure share. You will be prompted to enter a recipient email address and compose an email message.
2. Select **Email link** to send a public share. You will be prompted to enter a recipient email address and compose an email message.
3. Select **Copy link to clipboard** to copy the URL. You can then paste the URL within an email message, text message, or other communication tool.
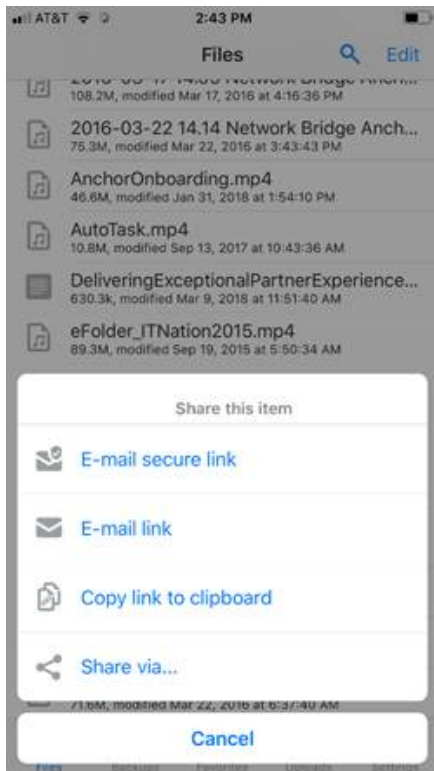
Backing Up Your Camera Roll

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

1. Press the Settings button
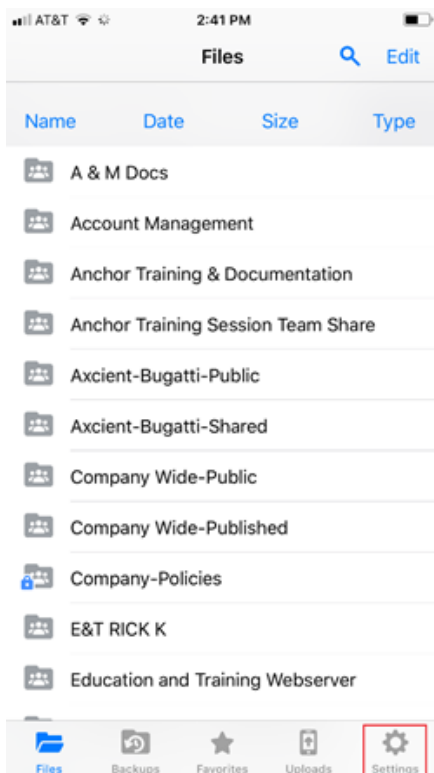
The *Settings* page displays.

2. In the Settings page, press the Camera Upload option. The Camera Upload menu displays.

- Select the **Enable Camera Upload** option to back up photos on your device.
- Select the **Upload Videos** option to back up videos on your device.
- Select the **Background Upload** option to initiate backups without accessing the app. **Note:** When uploading content over your mobile network, charges from your service provider may apply.

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

Setting a File or Folder as a Favorite for Offline Viewing

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

1. In the Files screen, slide the appropriate file or folder to the right to reveal a set of options for that file or folder.

2. Press the Favorite button (star icon) to mark the file as a favorite. If you favorite an entire folder, all if its files will become favorites as well.
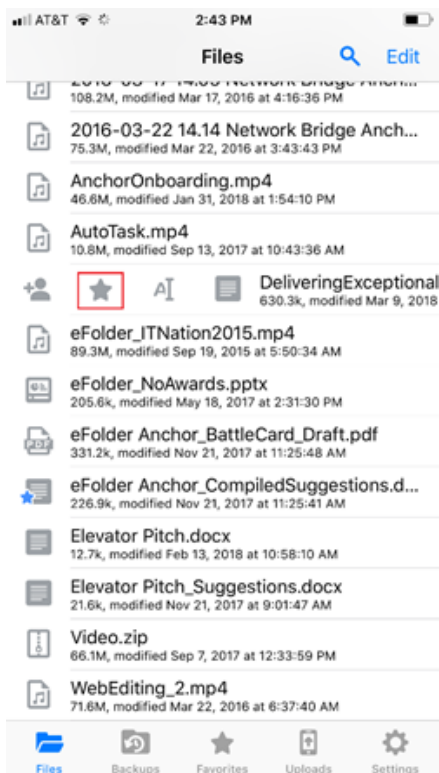
3. To a view a full list of favorite files and folders, press the Favorites button.
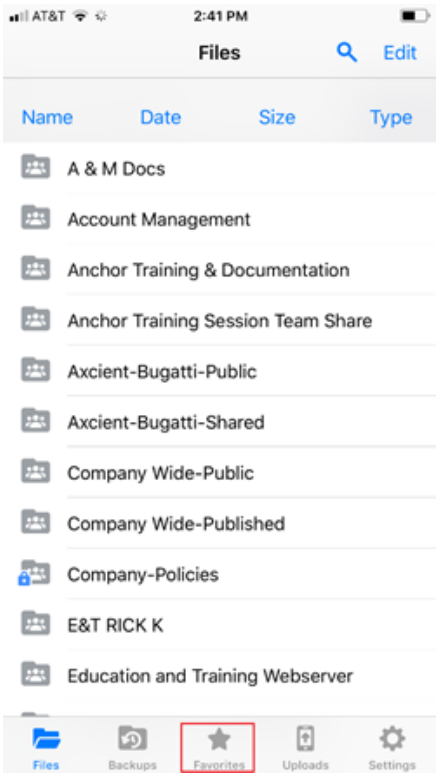
Using the Windows Phone App

Overview

If you use a Windows Phone, you can download the Windows Phone app in the Windows Phone store. The app allows you to view and manage files directly on your Windows Phone device.

Instructions

Prerequisite

You will need to install the SyncedTool App before proceeding. Please read the Downloading Mobile Apps article for information on installing software on your device.

Logging In

- In your Windows Phone, press the app icon to launch the app. The *login* window displays, prompting you to enter your login credentials.
- In the *Host* field, enter the **host** of the system (vitsync.*syncedtool.com*).
- In the *User* field, enter your email address (for example, user@mail.com).
- In the *Password* field, enter your **password.**

> ℹ️ Your organization may have a custom URL for accessing the web portal. Regardless all customers can access the system at the URL shown above.

> ℹ️ If your organization uses Active Directory your password will be the same as your network password (used to log in to your computer). If you are in a "Workgroup" environment you will have been provided a password in the welcome email.

Navigating the Windows Phone App

When you have access to your account, you can use the app to manage content.

1. Press the Backups link to view a list of your backups.
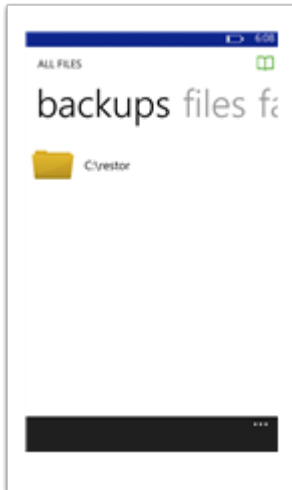
2. Press the Favorites link to view a list of your favorite items.

3. Press the Files link to view and manage your files.

Articles

Using the Outlook Add-In

Quick Video

Overview

The Outlook add-in allows you to email links to files and folders using your Microsoft Outlook application. When you use this feature, you can share links to synced content, as well as local content, directly from within your email platform.
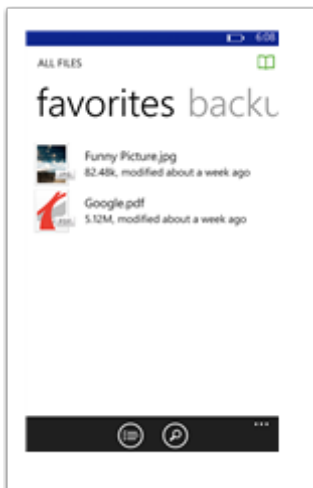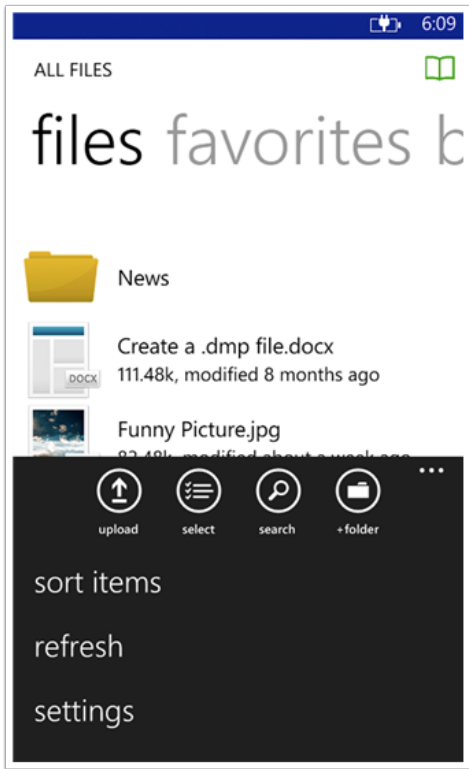
The Outlook add-in can be installed independent of the desktop client. It is a stand-alone application, and can therefore be used to send share links from Microsoft Outlook without fully downloading content to the local machine.

Alternatively, the Outlook add-in can be installed alongside the desktop client, giving you multiple options for local sharing and collaboration.

Use Cases

Using the Outlook add-in, you can send links—rather than standard attachments—to files and folders *of any size*, so you can share content that would otherwise be blocked by Microsoft Outlook. You can even ensure security by sending secure share links, so that all recipients must log in before accessing the shared content. In this way, you can safely work and share items from your email client, but with more options and configuration settings.

As an added benefit, the Outlook add-in keeps track of the items that you have shared by creating and populating a *Shared Items* folder in your Synced Folder. Because the Outlook add-in integrates with Synced Tool, you always have a backup of your content without needing to store or search for attachments within your email client.

Important Notes

❗ **Note:** The Outlook add-in can be installed in Microsoft Outlook versions 2010+ (Windows 32-bit and Windows 64-bit environments) with .NET 4.7.1 version or higher. Microsoft Outlook for Mac does *not* support third-party add-ins.

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

Recipients

Using the Outlook add-in, you can send share links to:

- An individual email address
- Multiple email addresses
- Entire distribution lists

When sending share links to multiple email addresses, or to a distribution list, each recipient will receive a unique share link.

Note: While the Outlook add-in recognizes individual email addresses associated with *standard* distribution lists, members of a *dynamic* distribution list will not receive share links as expected. Unlike regular distribution lists, which contain a preset list of members, dynamic distribution lists generate a membership list at the time the email is sent, based on the filters and conditions that have been defined in Active Directory. This process prevents the Outlook add-in from generating unique share links as expected.

As a workaround, when sending a share link to a dynamic distribution list, we recommend creating a share link through the web portal, and copying and pasting this share link into the body of the email message. For more information, please reference the [Creating Share Links as an End User](#) article.

Instructions

Configuring Outlook Add-In

When you configure your default settings, you can decide to:

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

> ⓘ Note: You can optionally configure the Outlook add-in so that all items are sent as secure shares; however, if the Force New Share Links to Require Login policy is

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Additionally, when configuring attachment policies, you can determine how the Outlook add-in manages your sent content.

When you send items through the Outlook add-in, a new *Shared Items* subdirectory is created for you in your Synced Folder. By default, this folder is located at the top-level of your Synced Folder, but you can change its location when you configure your Outlook add-in preferences.
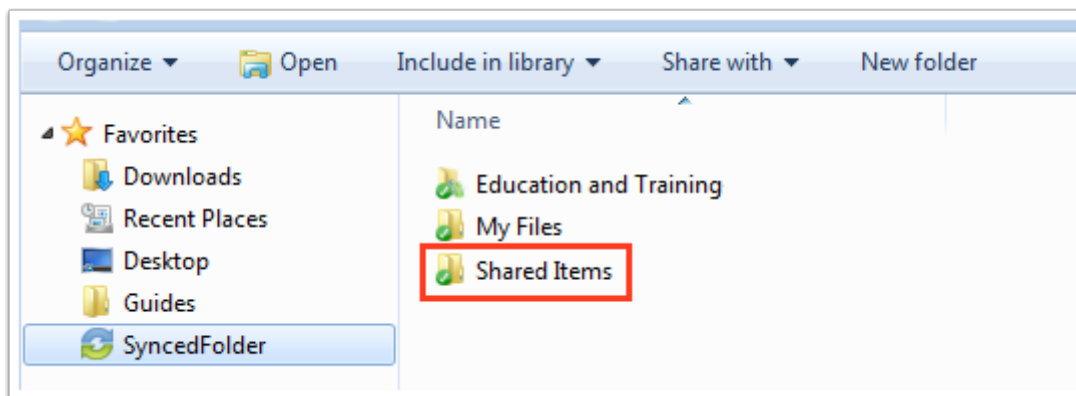
When you configure these policies, the Outlook add-in operates as a truly intelligent tool, automatically sending share links according to the way you like to work. For example, you can tell the add-in to:

- Automatically use the Outlook add-in for attachments over a certain size, even when an email draft already includes a standard attachment (for example, when forwarding messages). The add-in will automatically convert these attachments to share links, and store these items in your Shared Items folder.
- Automatically use the Outlook add-in for all attachments, even when an email draft already includes a standard attachment. The add-in will automatically convert all attachments to share links, and store these items in your Shared Items folder.
- Only use the Outlook add-in when selected.

Using the Outlook Add-In

When you compose a message in Microsoft Outlook, you use the *Attach* drop-down button to attach content in a variety of ways, including:

- Browse and select files and folders stored in Synced Tool, or
- Browse and select a local file stored on your machine.
- Convert an item to a share link, which is particularly useful when forwarding email messages that originally included a standard attachment. You can decide to manually convert these

items using the *Attach* drop-down menu, or this will happen automatically, depending on your attachment polices.

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

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

How to Install the Outlook Add-In

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

To download the Outlook add-in:

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

2. In the Download page, click the Outlook button. The file will start to download, or you will be prompted to save the file, depending on your browser type.

3. When the file finishes downloading, make sure Microsoft Outlook is closed, and click the installation file. The Setup Wizard opens.

4. Click the Next button to start the Setup Wizard.
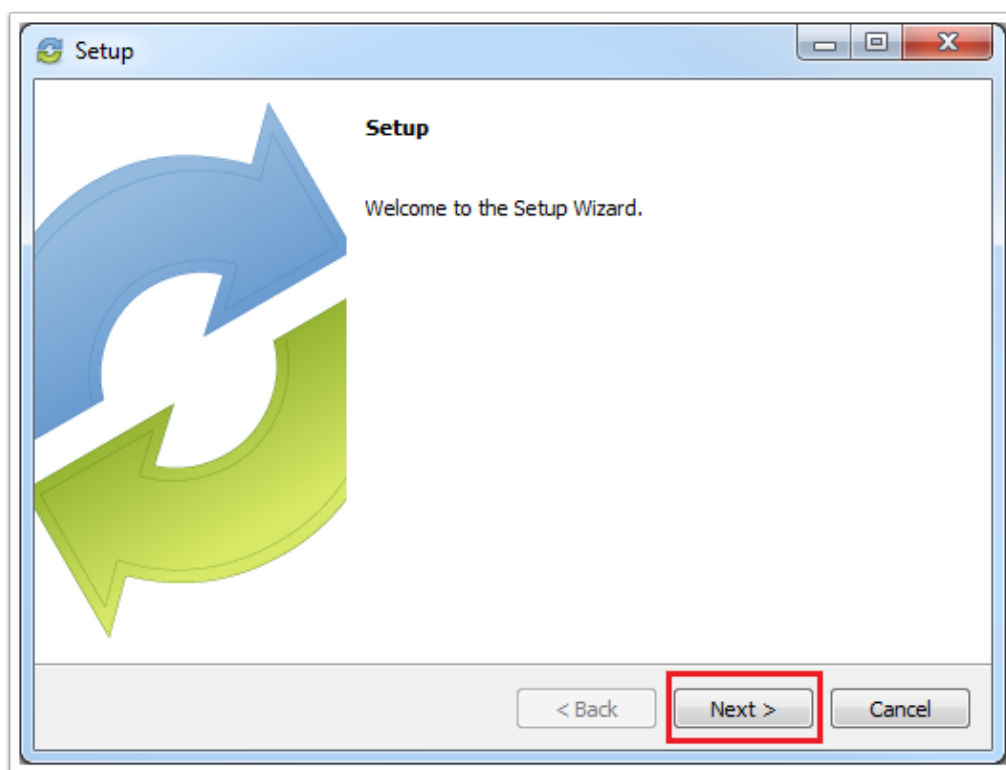
5. In the License Agreement screen, click the I accept the agreement radio button if you accept the license. Then, click the Next button to continue.
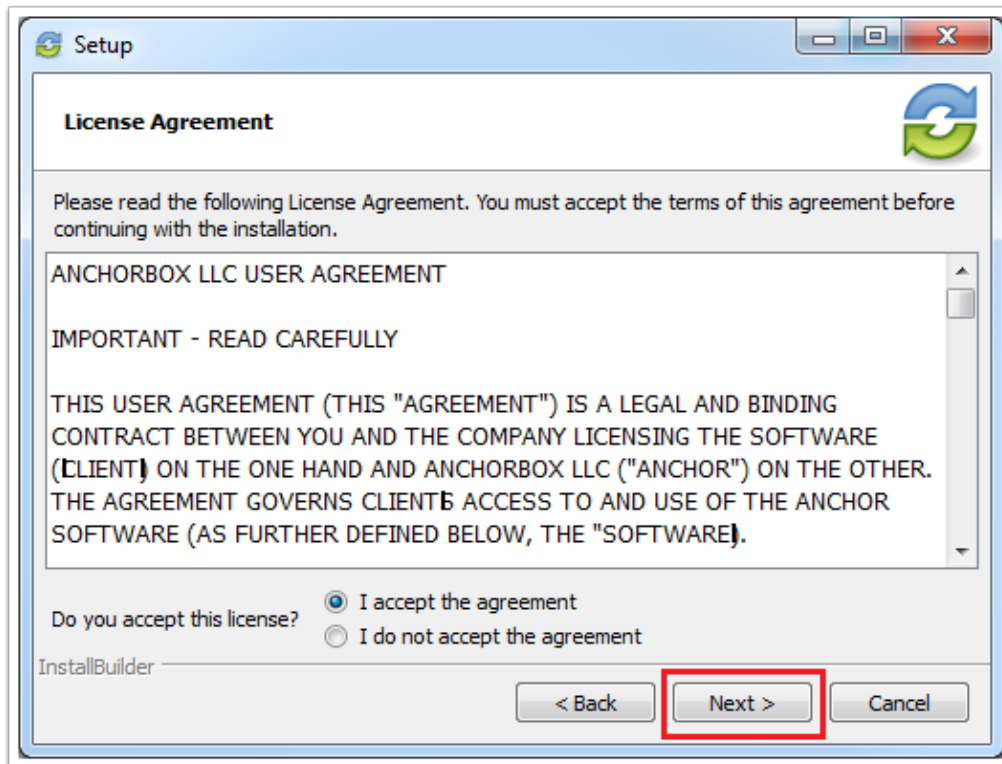
6. In the Installation Directory screen, select the location where you want the installation files to reside on your local machine. In most instances, you can accept the default location. Click the Next button to continue.
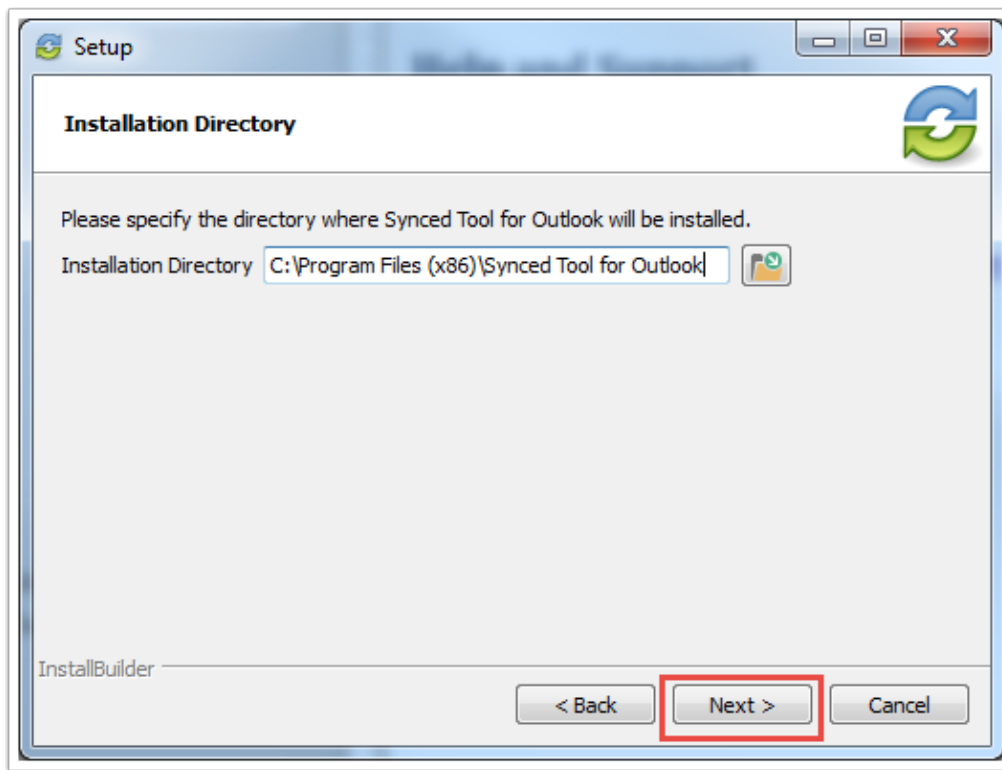
7. In the Ready to Install screen, click the Next button to begin the installation process.
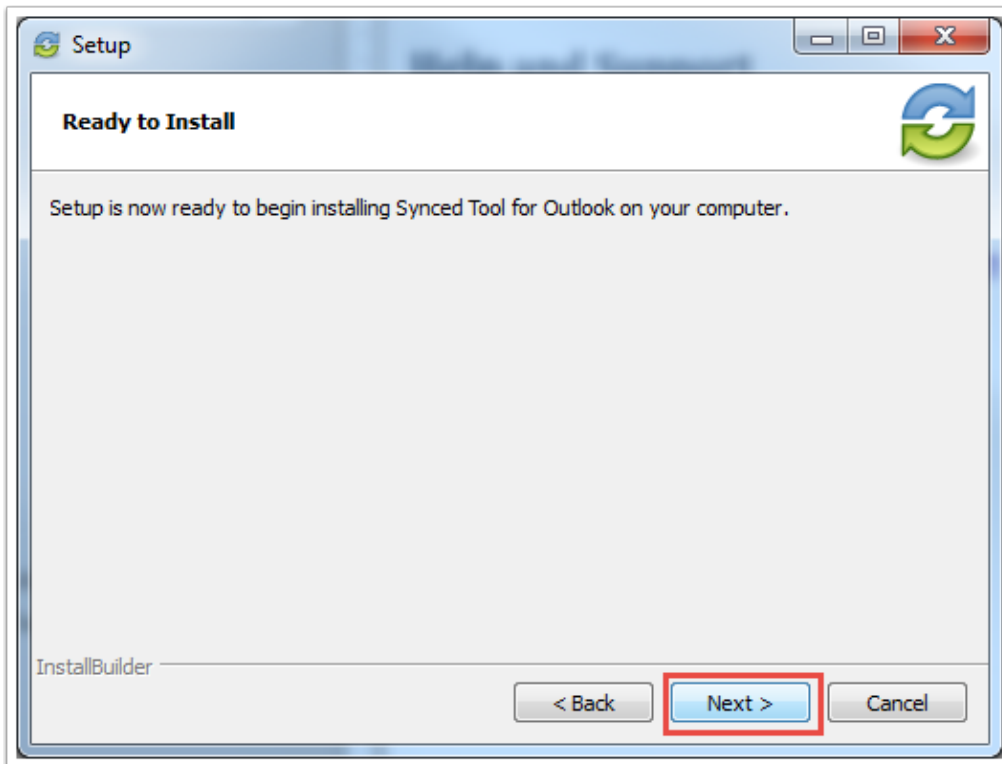
8. When the Setup Wizard completes, click the Finish button.
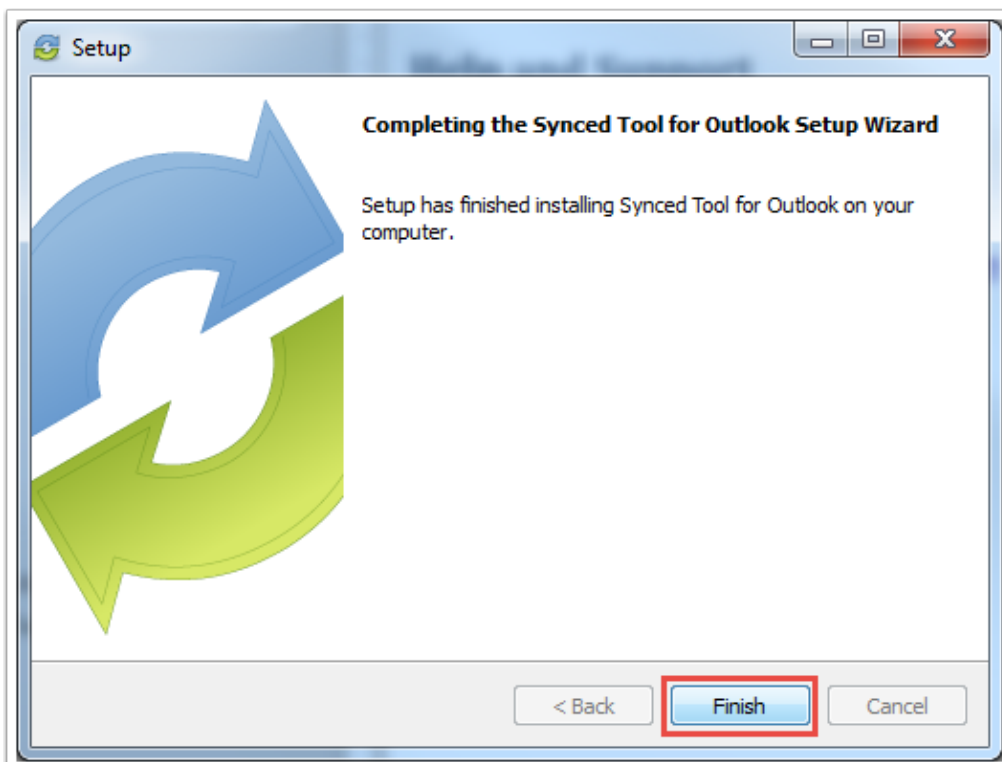
9. In some instances, you might need to restart your MS Outlook application.

How to Configure the Outlook Add-In

After you install the Outlook add-in, you can configure default share settings and attachment policies.

1. When you launch Microsoft Outlook for the first time after installing the Outlook add-in, the Wizard displays, prompting you for login credentials.

- If prompted, enter the organization **host name** in the *Host* field (vitsync.syncedtool.com).
- In the *Username* field, enter the same **email address** that you use to access the web portal.
- In the *Password* field, enter the same **password** that you use to access the web portal.
- Click the **Next** button when you are finished.

> ℹ️ Note: In most instances, the *Host* field will be pre-populated with the appropriate host name.

2. In the Choose your Default Share Settings screen, set default settings for how you share links.

- Click the **Notify on upload** checkbox to receive notifications when a file is uploaded to a shared folder.
- Click the **Notify on download** checkbox to send notifications when the share is downloaded.
- Click the **Download limit** checkbox, and enter a **download limit** number, to limit the number of times the share is downloaded by each recipient.
- Click the **Expire share after** checkbox, and enter a **number of days**, to set a share to expire after the specified number of days.
- Click the **Secure Share by Default** checkbox to send all content as secure shares. If this option is selected, all recipients will be required to log in to access the shared content. A recipient who is not a member of your organization will be added as a guest user; a guest account will be created for the recipient, and login credentials will be provided.

> **ℹ** Note: If the *Force New Share Links to Require Login* policy is enabled for your organization, this feature is turned on by default, and is not configurable by end users.

- Click the **Next** button to continue.
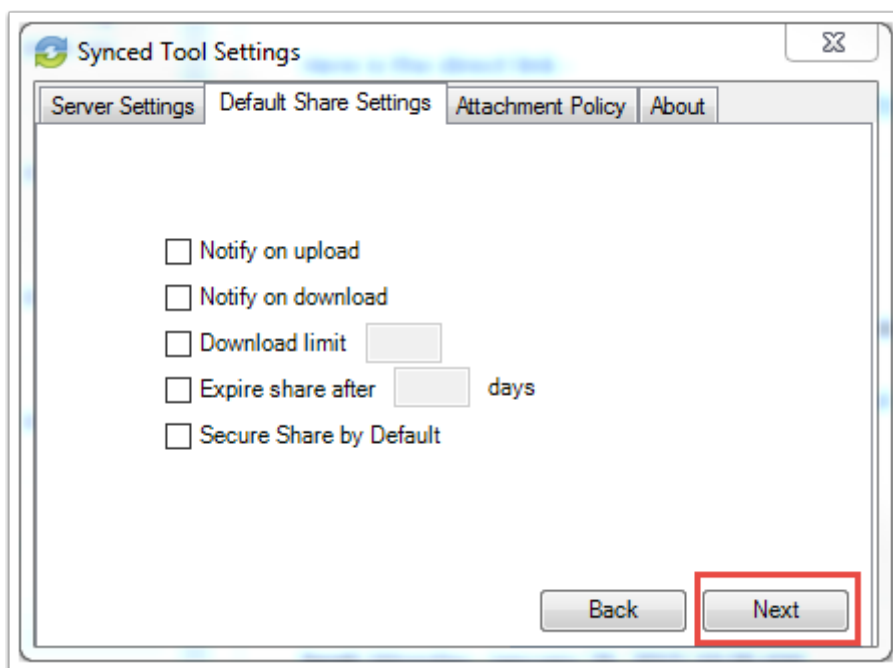
## 3. In the next screen, set default attachment policies.

- Click the **Automatic** radio button to automatically use the Outlook add-in for attachments over a certain size, even when an email draft already includes a standard attachment (for

example, when forwarding messages). The add-in will automatically convert these attachments to share links, and store these items in your Shared Items folder.

- Click the **Always use for attachments** radio button to automatically use the Outlook add-in for all attachments, even when an email draft already includes a standard attachment. The add-in will automatically convert all attachments to share links, and store these items in your Shared Items folder.

- Click the **Advanced** radio button to only use the Outlook add-in when selected.

- Click the **Use default folder** checkbox to use the default location for storing shares configured from Outlook. If you uncheck this checkbox, you will be prompted to select another location on your local machine.

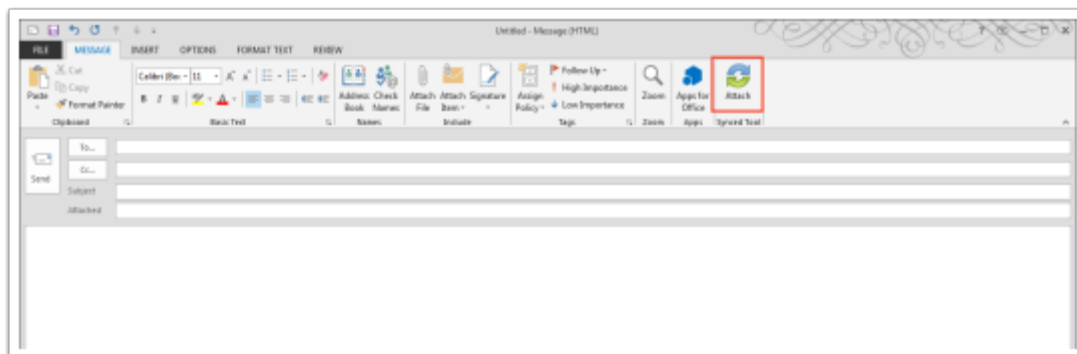- Click the **Next** button to continue.
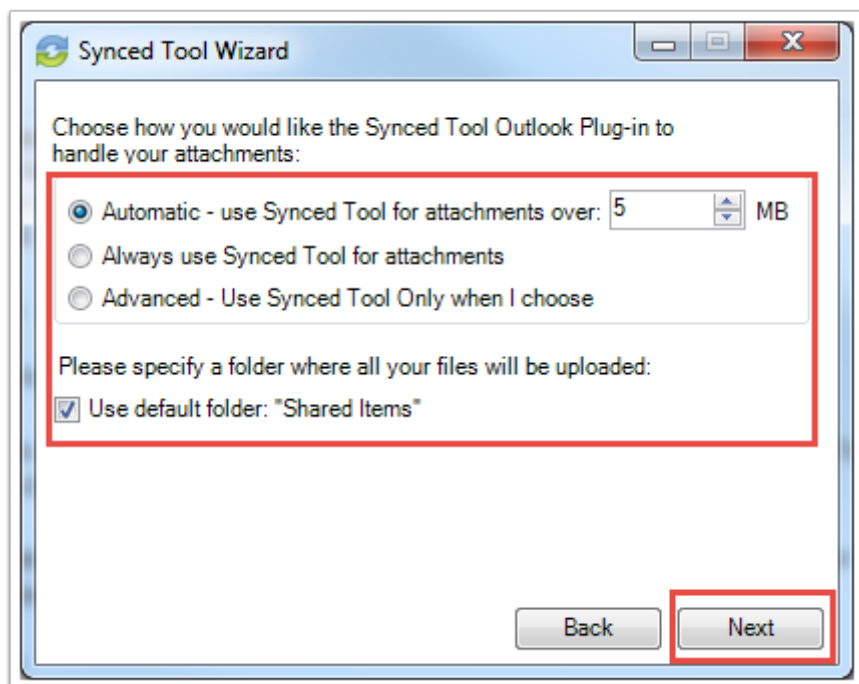
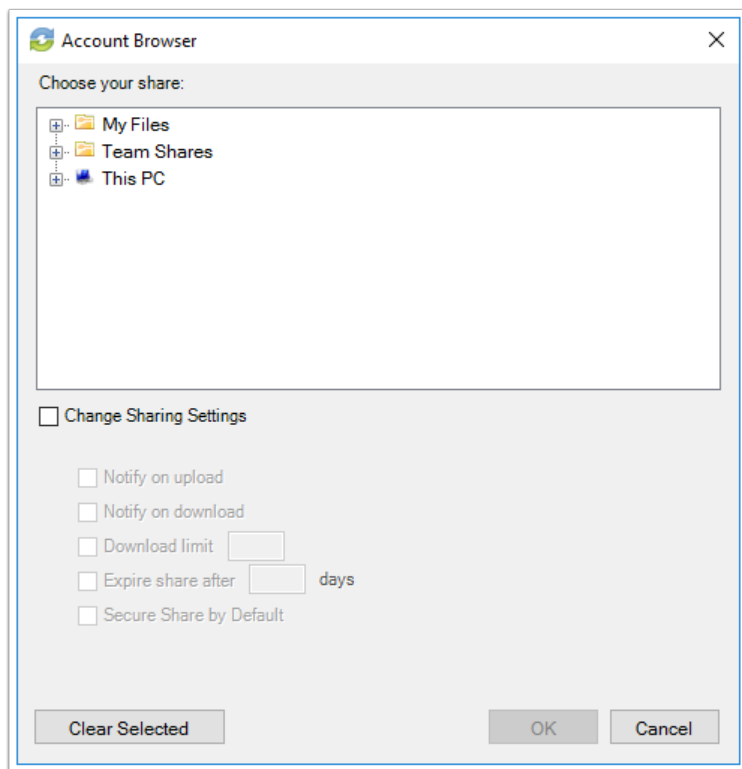**4. When the Wizard completes, click the Finish button.**
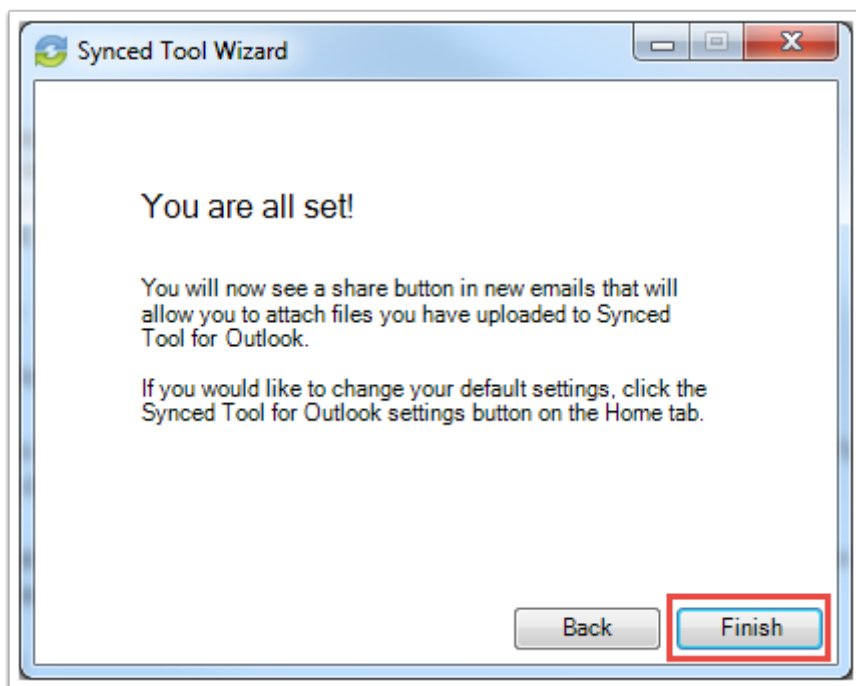
How to Use the Outlook Add-In

To use the Outlook add-in:

1. In Microsoft Outlook, create a new email message. The ribbon will display an Attach drop-down button.

**2. Click the Attach drop-down button, and select Send a File.**

The *Account Browser* dialog box displays*.*

3. In the Account Browser dialog box, select the content you want to share.

- To attach a file or folder stored in Synced Tool, click to expand the *My Files* folder, or the *Team Shares* folder, and select the appropriate content.
- To send a file from your local machine, click to expand *This PC*. You can then browse and select a file on your machine.
- Optionally, you can change your default share settings by clicking the **Change Share Setting** scheckbox.

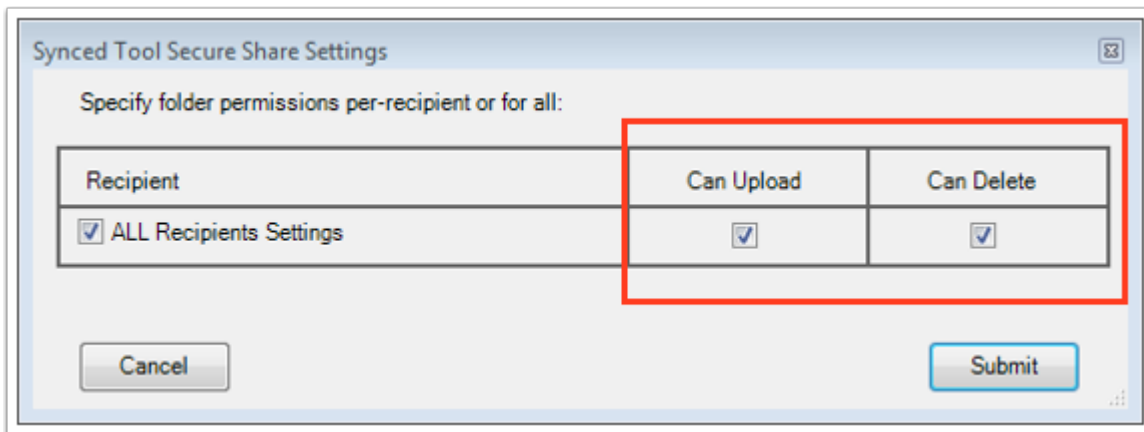## 4. Alternatively, to convert an attached item to a share link, click the Attach drop-down arrow and select Convert to Synced Tool File.
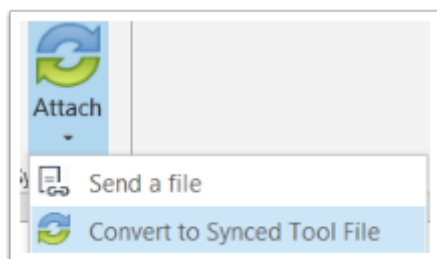
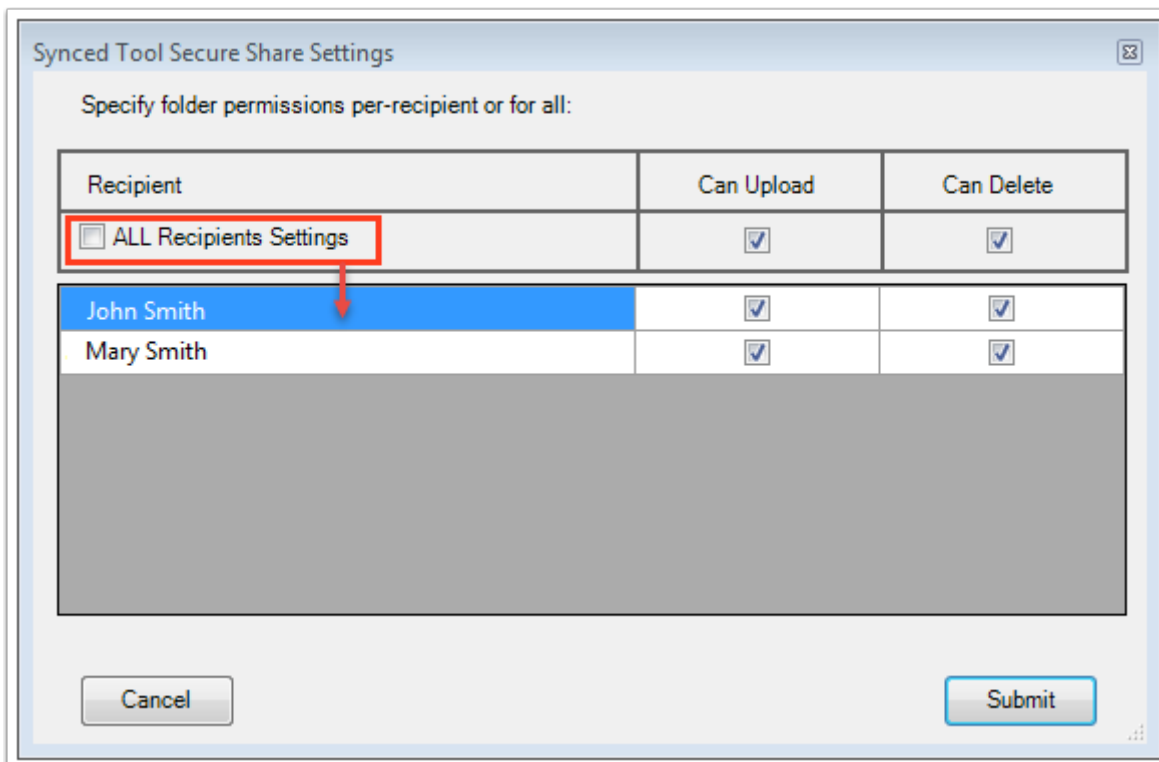Any attached item will automatically convert to a share link, and will be stored in your Shared Items folder.

5. Click Outlook's standard Send button to send your email.

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

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

Receiving a Share Link through the Outlook Add-In

Recipients of a *standard* Outlook add-In share link will receive one email message, which includes the body (full thread) of the email and a URL to download the shared file or folder.

Recipients of a *secure* Outlook add-in share link will receive two email messages:

- An email message that preserves the body (full thread) of the email
- An email message with a URL to log in and download the secure share

Separate email messages ensure that the links are sent securely, and the full body of the email thread is preserved.

> ℹ **Note:** If a recipient is an outside user, the system will automatically create a guest account for that user, and he or she will receive a third email indicating that a guest account has been created.

Creating Share Links as an End User

Overview

Share links allow you to share a direct link to a file or folder to internal or external users. You can send a *public share* or a *secure share.* Secure shares require each recipient to log in with their own unique login credentials. If you send a secure share to a recipient outside of your organization, the system will automatically create a guest account for that user and send the credentials through email.

Instructions

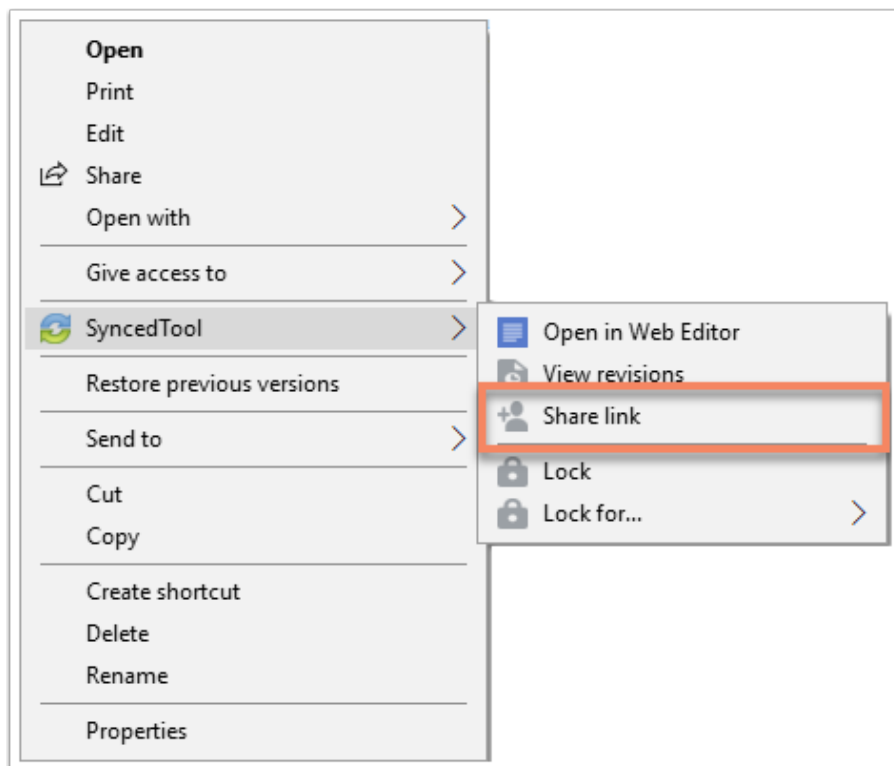## Sharing a File

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

1. In the web portal, right-click the file and select Share.
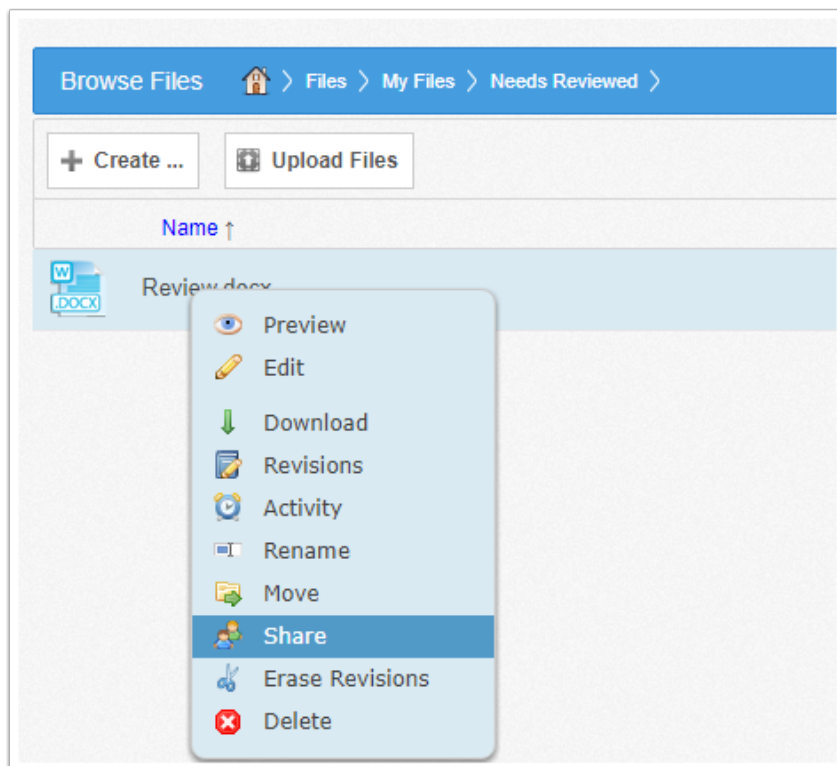
Or, if you are working in the desktop client, right-click the file, point to the context menu, and select **Share link.**

A *Share Access* dialog box displays, allowing you to configure share settings.

2. In the Share Access dialog box, configure settings for sharing the link, including:

- The *Secure Share* option, which requires each recipient to log in with his or her unique credentials.
- The *Public Share* option, which sends a publicly available share link to the file. If you create a public share link, you can also select the **Allow anonymous users to edit files** checkbox to allow users to edit the file online using the Collaborative Web Editor.
- The *Share Options* settings, which allow you to:
  - Select whether the share link will expire after a certain date
  - Set a download limit
  - Turn on email notifications for when the share is downloaded

- The *Share With* settings, which allow you to specify share recipients and set permissions for each of these users. This section is only required if you are sending a *secure* share link. Alternatively, for public share links, you can optionally copy the share link and send it to desired collaborators through third-party communication tools.
- The *Permissions* settings, which let you set *Can Modify* permissions, allowing the specified user to edit the file using the Collaborative Web Editor.

3. Click the Share button save your changes. You will be redirected to the share landing page, where you can open the file in edit mode (if supported), reconfigure share settings, download the file, and more. This is the same landing page that will be seen by the share recipient(s).
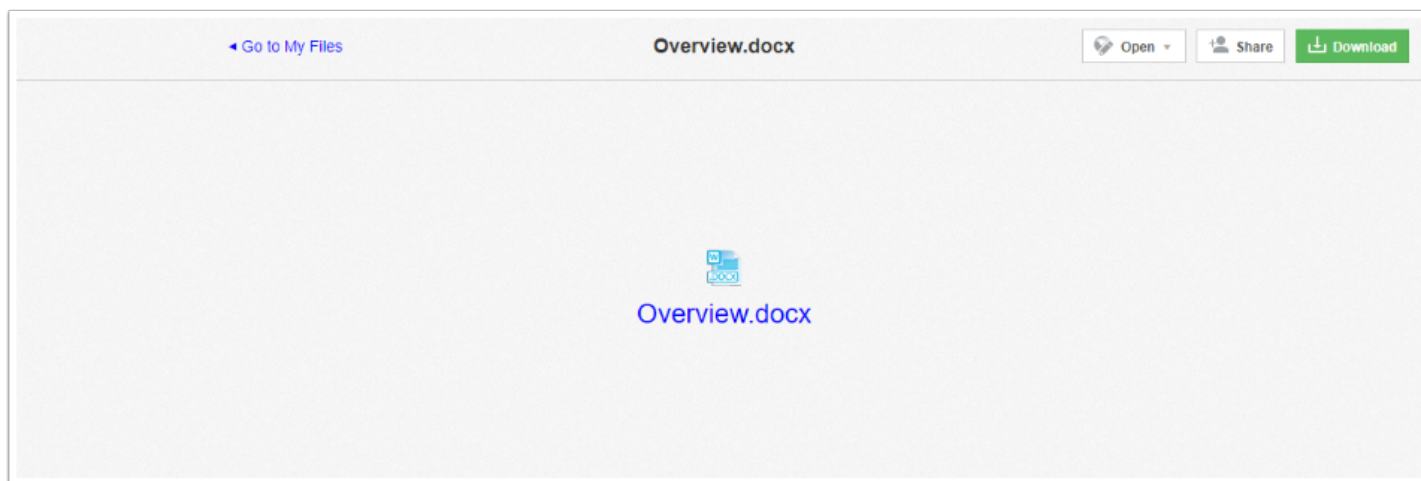
4. Alternatively, click the Delete button to cancel your configuration settings and delete the share link.
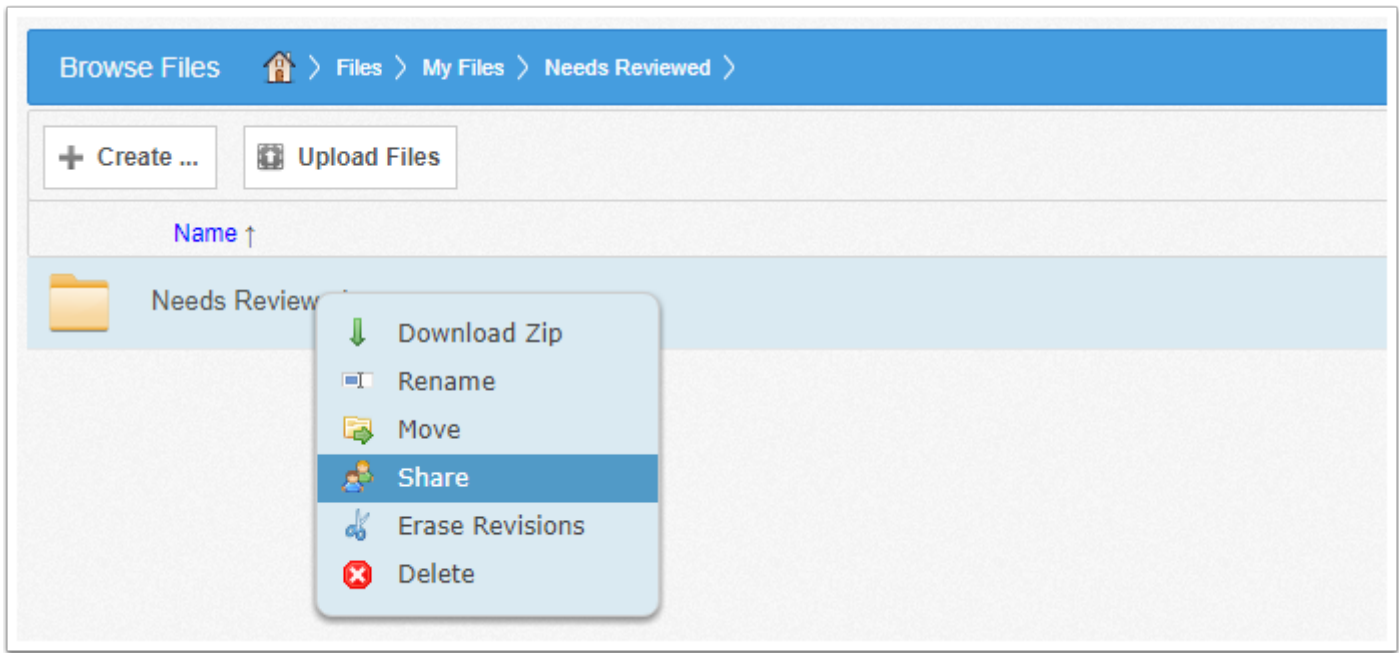
> ℹ️ Note: If you reopen and edit the share link, you will see a Cancel button, which will close the dialog box, but will not delete the share link.

Sharing a Folder

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

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

Or, if you are working in the desktop client, right-click the folder, point to the context menu, and select **Share link**. A *Share Access* dialog box displays, allowing you to configure share settings.

2. In the Share Access dialog box, configure settings for sharing the link, including:

- The *Secure Share* option, which requires each recipient to log in with his or her unique credentials.
- The *Public Share* option, which sends a publicly available share link to the folder. If you create a public share link, you can also select the **Allow anonymous users to edit files** checkbox to allow users to edit files within the folder using the Collaborative Web Editor.
- The *Share Options* settings, which allow you to:
  - Select whether the share link will expire after a certain date
  - Set a download limit
  - Turn on email notifications for when the share is downloaded

- The *Share With* settings, which allow you to specify share recipients and set permissions for each of these users. This section is only required if you are sending a *secure* share link. Alternatively, for public share links, you can optionally copy the share link and send it to desired collaborators through third-party communication tools.
- The *Permissions* settings, which let you set the following permissions:
  - *Can Modify* permissions allow the specified user to edit files within the folder using the Collaborative Web Editor. *Can Modify* also lets users upload files into the folder.
  - *Can Delete* permissions allow the user to delete files within the shared folder.

3. Click the Share button save your changes. You will be redirected to the share landing page, where you can view and manage the contents of the folder,

create and upload additional files, download the folder as a zipped file, reconfigure share links, and more. This is the same landing page that will be seen by the share recipient(s).
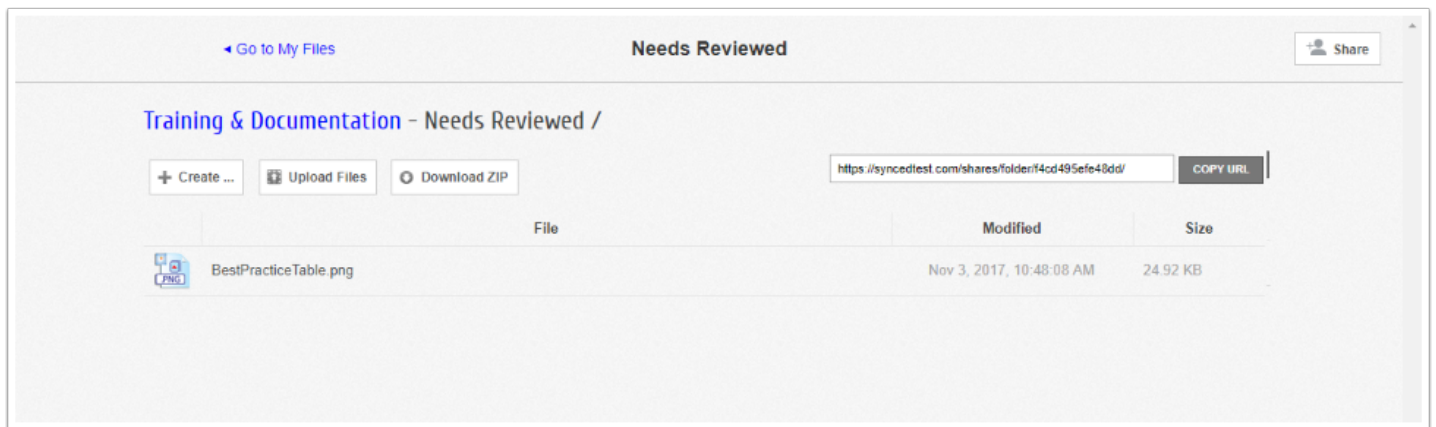
4. Alternatively, click the Delete button to cancel your configuration settings and delete the share link.

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

Deleting or Revoking Share Links

Share links can be deleted by both administrators and the end user who generated the share link. When a share link is deleted, all users who had previously been given access to the shared content will no longer have the ability to navigate to the share link URL.

Alternatively, administrators and end users can revoke access to one or more users who were previously granted access, without deleting the entire share link URL.

End users can manage share link settings in the *Shares* tab of the web portal.

1. In the web portal, click the Shares tab.

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

3. Click the Delete button to delete a share link URL.

4. You can also click the share link arrow to expand an item, which allows you to view detailed information about the user that received your shared content. It also allows you to revoke access to one or more users individually, without deleting the entire share link URL.

Viewing Items Shared With You

You can also view a list of all content that has been shared with you by other users.

1. In the web portal, click the Shares tab.

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

 FLUID NETWORKS

Receiving and Sharing Content With Guest Accounts as an End User

Overview

In addition to collaborating and sharing content with internal coworkers, end users can also share files and folders with external, third parties. These users are called guests. Guest accounts have limited access for a fixed period of time, allowing for the transfer of files or folders, or for group collaboration on specific content.

Guest users can be created in one of the following ways:

- The system automatically creates a new guest account when a private share link is sent to an unregistered email address.
- End users can create a new guest account in the *Guests* tab of the end user web portal.

Guest Account Access

Guest accounts *can*:

- Access a shared file or folder through the web portal
- If given permission, upload, edit, and delete content in securely shared folders
- Manage their account information and change their password

Guest accounts *cannot*:

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

Best Practice

If you will be collaborating with an external, third-party on a regular basis (for example, with a customer, client, or consultant), you might consider sharing an entire folder to aid in the collaboration process. When you create a secure share link to a folder, you can specify the email address of this external user, and configure appropriate permissions. When you send the secure share link, the system will detect the unregistered email address, and automatically generate guest credentials for this new user. In this way, the shared folder becomes a collaborative space where you can exchange and review content.

Instructions

Sharing a File or Folder with a Guest Account

In the example below, a folder will be shared to allow a guest account(s) to upload content into the system. Alternatively, you can also send share links to individual files.

1. In the desktop client, right-click the folder or file you want to share, point to the sync menu, and select Share link.
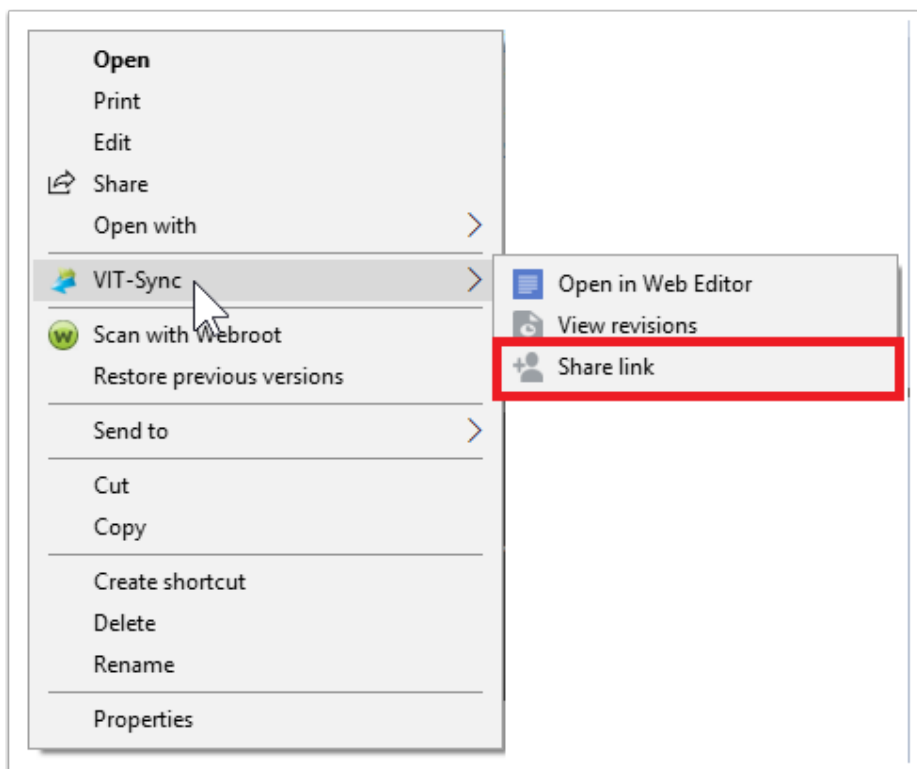
Alternatively, in the web portal, right-click the file you want to share, and select **Share.**
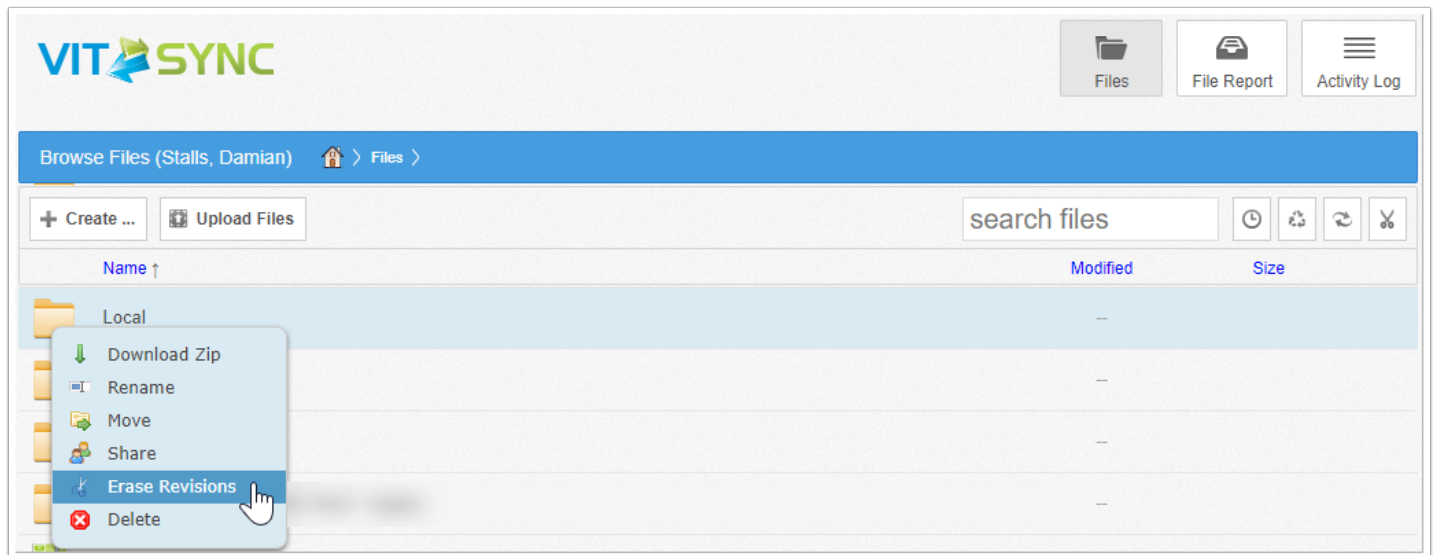
The *Share Access* dialog box displays:
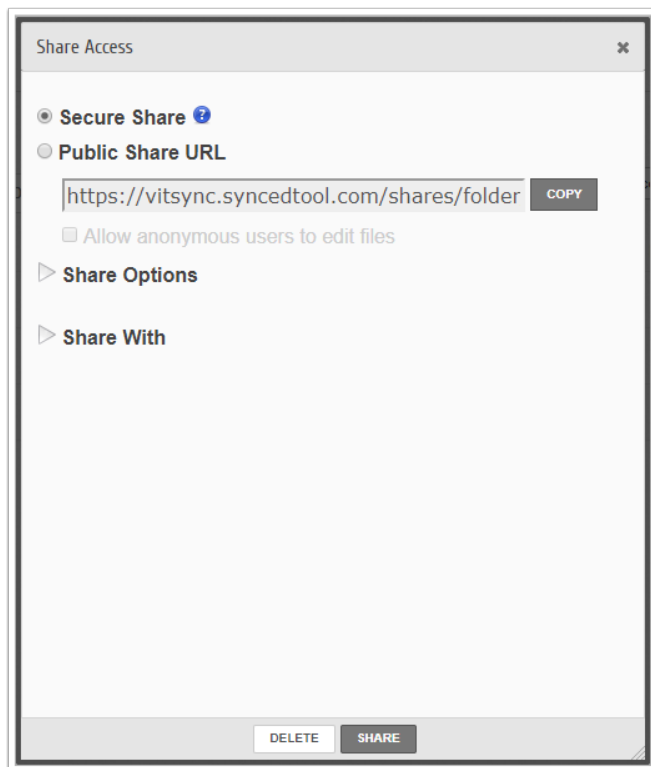
2. In the Share Access dialog box, configure share options:

• Select the Secure Share radio button, which will require each user to log in with unique credentials before accessing the shared content. By choosing *Secure Share*, the system will automatically create a guest account for unregistered email addresses.

> **Note:** Alternatively, click the *Public Share* option to send a standard share link. If you select this option, the recipient will *not* be required to log in, and a guest account will *not* be created. For more information on public shares, please reference the [Creating Share Links as an End User](#) article.

- In the *Share Options* section, set optional configuration settings:
  - In the *Expiration Date* field, select a **date** on which the share link will expire. When a share link expires, recipients will no longer have access.
  - Click **Notify on Upload** to receive an email notification when a file is uploaded into the folder.
  - Click **Notify on Download** to receive an email notification when a file is downloaded from the folder.

- In the *Share With* section, configure recipient information and permission settings:
  - In the *Recipients* field, enter the **email address** of the guest. The email address will automatically populate in the Permissions table.
  - Optionally, use the *Notify* field to determine who will receive a notification when the share link is configured. You can select from **New Recipients**, **Everyone**, or **None**. This field is especially useful if you are re-configuring share settings after the initial share link is sent.
  - In the Permissions table, set permissions for each recipient.
    - Click **Can Modify** to allow the specified user to edit the file using the Collaborative Web Editor. This permission also allows users to upload files into the folder.
    - Click **Can Delete** to allow the user to delete files within the shared folder.

3. Click the Save button when you are finished. The page refreshes to display the share landing page, allowing you to manage the shared folder.

You can always revisit this share landing page from the *Shares* tab of the web portal. For complete instructions, please reference the [Creating Share Links as an End User](#) article.

4. Optionally, click the Share button to reconfigure share settings.

The recipient will receive an email notification with login credentials. After logging in, guest users will be able to see the contents of the shared folder. Guest users can also manage their own user settings—including their name, email address, and password—and can even delete their own account.
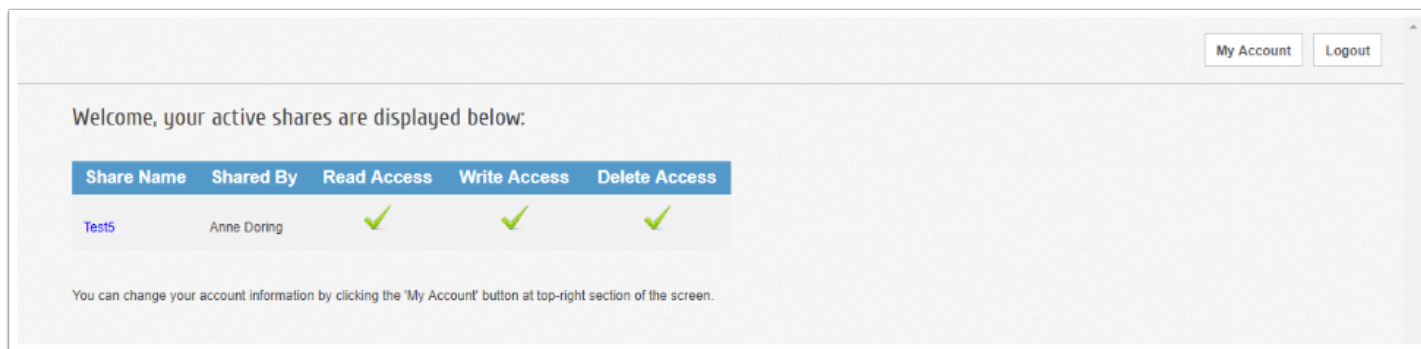
Managing Guest Accounts as an End User

To manually create a guest account as an end user in the web portal:

1. Click the My Files button in the black menu bar. The My Files page displays.

2. In the My Files page, click the Guests tab. The Guest Accounts page displays, showing a list of guest accounts that you have created.
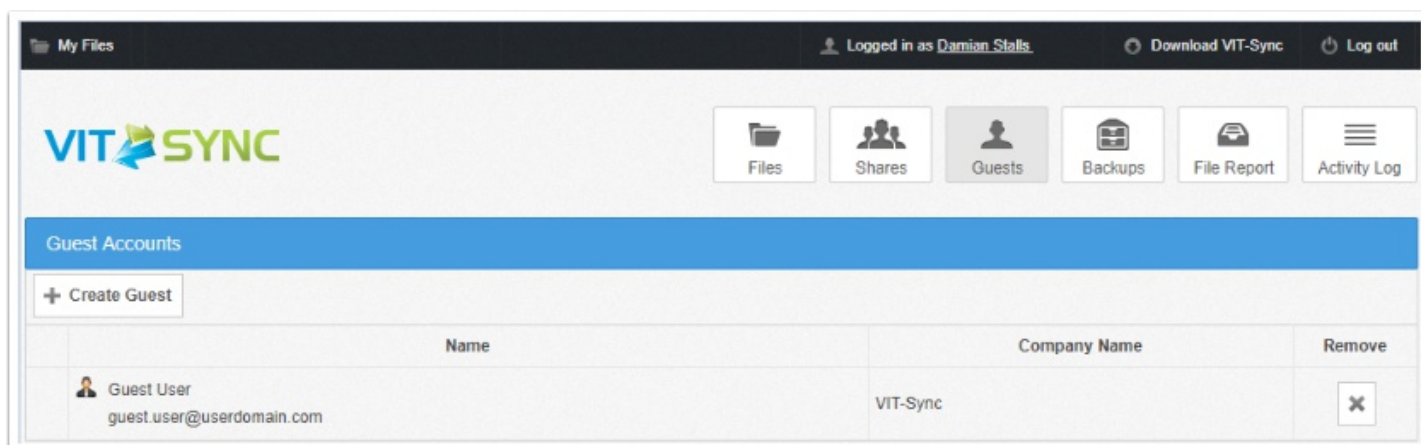
3. To create a guest, click the Create Guest button.

The *Create Guest* page displays, allowing you to configure settings for the new guest.

- In the *Guest Settings* page, you can configure the guest's first name, last name, email address, and password.
- Use the *Password Expires* field if you would like to generate a time-sensitive password for the new guest user. You can select from **6 hours**, **12 hours**, or **24 hours**. If you do not want to generate a time-sensitive password, leave this drop-down field set to **Never**.
- In the *Default Language* drop-down menu, select the **preferred site language** for the organization, which also affects numbering formats. Leave this field blank to use the default language set for the system.
- In the *Default Timezone* drop-down menu, select the preferred **timezone**, which affects dates and times displayed across the system. You can also leave this field blank to use the system default.
- By default, the *Send Welcome Email* checkbox is selected, which will send a welcome email to the new guest, containing information about how to access the system. Uncheck this checkbox if you do not wish to send a welcome email.

> ℹ️ Note: If you deselect this setting, remember to manually contact the guest to share login information.

4. Click the Save button when you are finished.

Using the Selective Sync Feature

Overview

Selective Sync lets end users select which Team Shares and subfolders sync down to their local machines. With Selective Sync, users can easily prioritize the content that is most important to them while saving on bandwidth and storage costs. Users can still access all of the data they have stored in the cloud, whether it is synced locally or not, through the web portal.

The Selective Sync feature is configurable through the desktop client installed on both Windows and Mac machines.

Use Cases

To conserve bandwidth and local storage resources, use the Selective Sync tool to selectively sync down only the folders that you work with most frequently. Remember that you can always change the folders that sync locally as content needs change. For example, if you are currently working on one project folder in a Team Share, you might decide to only sync down that one subfolder. When you begin working on a new project, you can then sync down the new project folder.

You might also decide to use the Selective Sync feature when you first register and install the desktop client. In many instances, registration takes many hours—even days—to completely sync down all Team Shares and personal content. The *Registration* wizard allows you to access the Selective Sync feature during registration so that you can prioritize this initial sync down process.
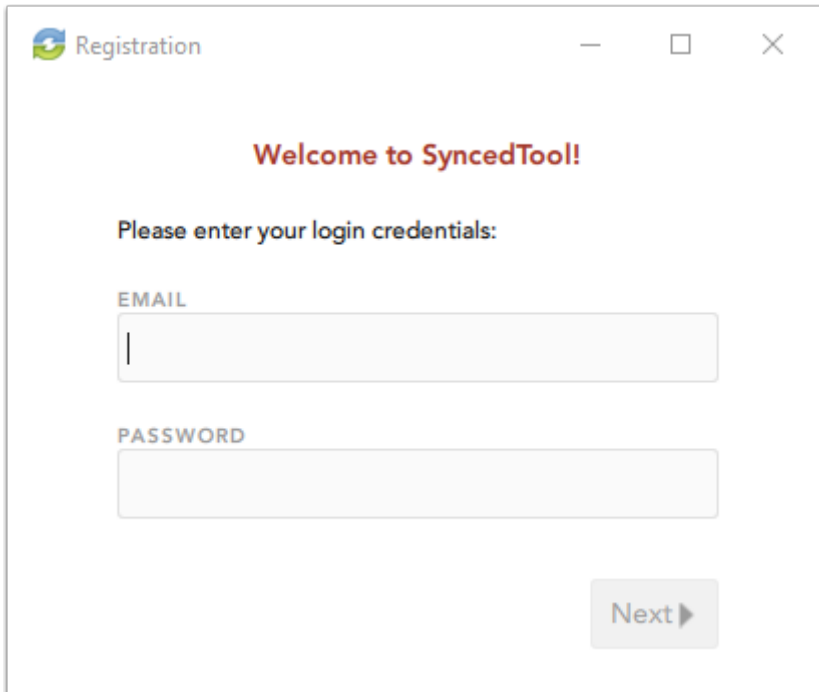
Instructions

For New Users: How to Selectively Sync Folders During Desktop Client Registration

After installing the Anchor desktop client on a desktop or laptop, the *Registration* wizard prompts the user to select the content that should sync down to the local machine.

1. After the Setup wizard completes, the Registration wizard will automatically launch. Click the Next button to begin the registration process.

For full instructions on how to install the desktop client, please reference the [Installing and Configuring the Desktop Client](#) article.
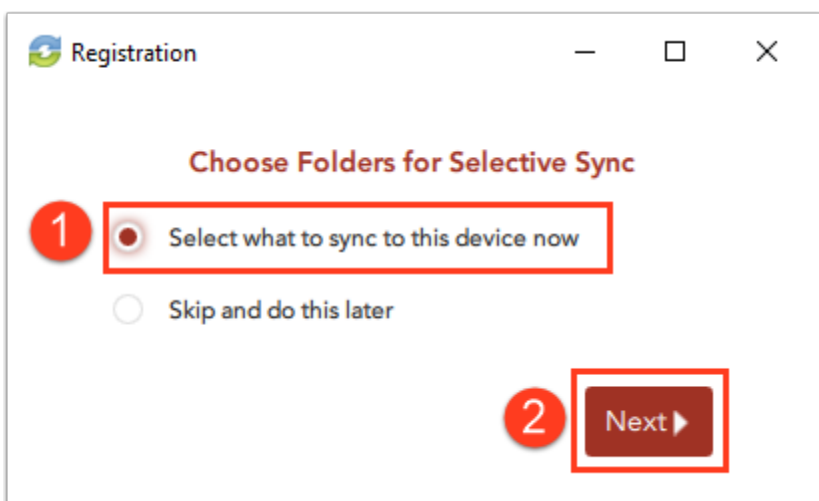
2. When the wizard displays the Choose Folders for Selective Sync screen, click the Select what to sync to this device now radio button to deselect content that you do not want on your local machine. Then, click the Next button to continue.

The *Selective Sync* screen displays.
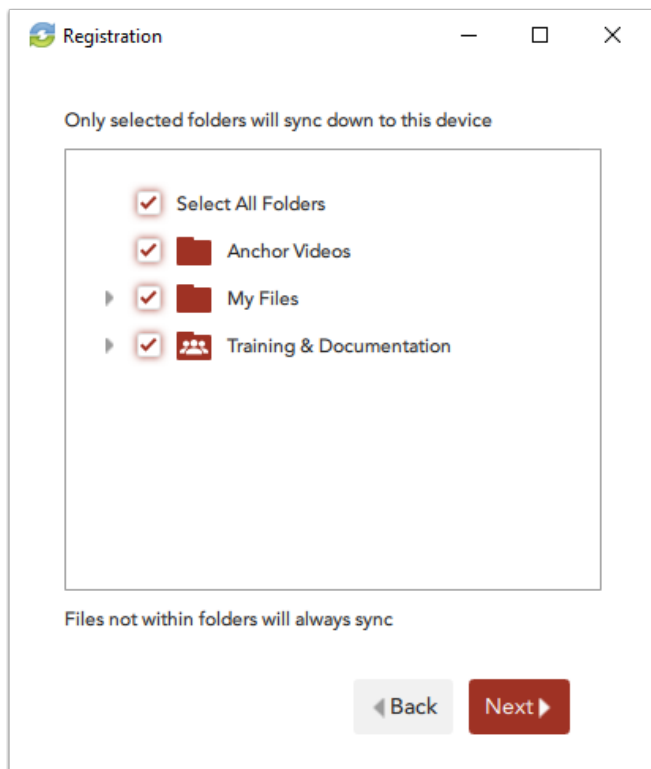
3. You can unsubscribe your local machine from syncing an entire Team Share by deselecting the top-level checkbox adjacent to the appropriate Team Share root. Or, you can select an entire personal folder.

Optionally, you can navigate using your keyboard arrow keys.
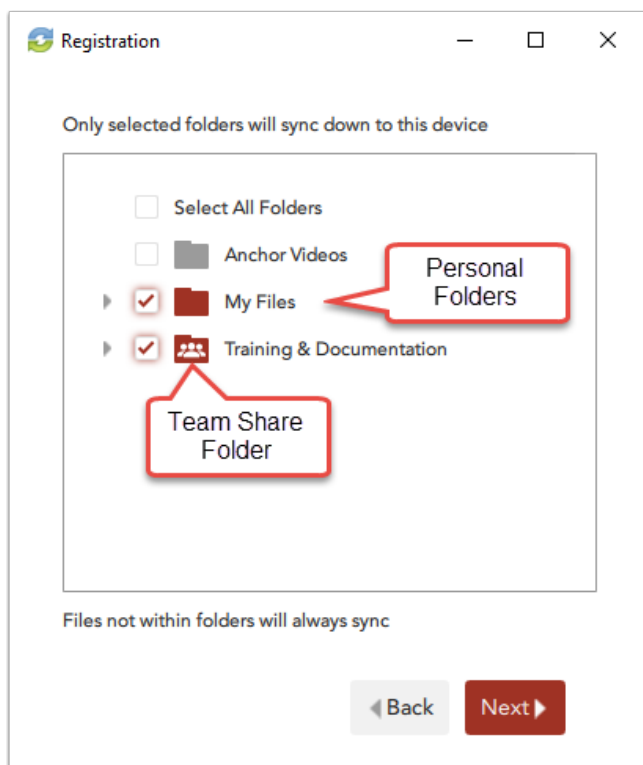
You can also click to expand these items to deselect content at the subfolder level.

4. Continue the registration process until completion.

For Existing Users: How to Selectively Sync Folders After Desktop Client Registration

You can also use the Selective Sync feature after registration is complete.

1. Click the system tray icon, click the Manage icon, and select Preferences.
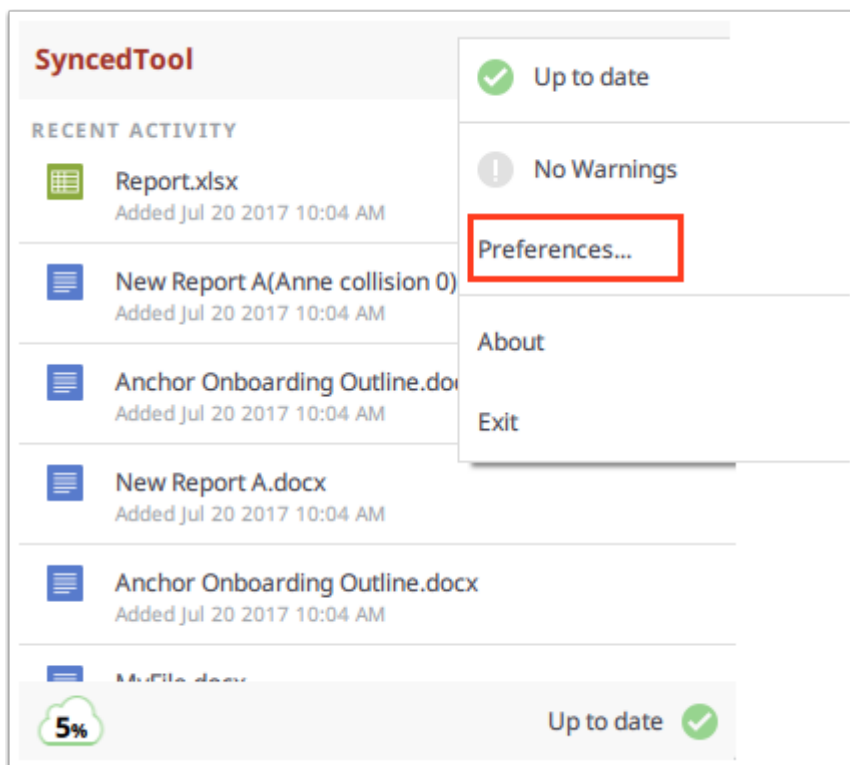
2. Click the Sync tab.

3. In the Sync tab, you can select or deselect Team Shares and subfolders from syncing down to your local machine. Optionally, you can navigate using your keyboard arrow keys.

You can also click to expand these items to deselect subfolders.
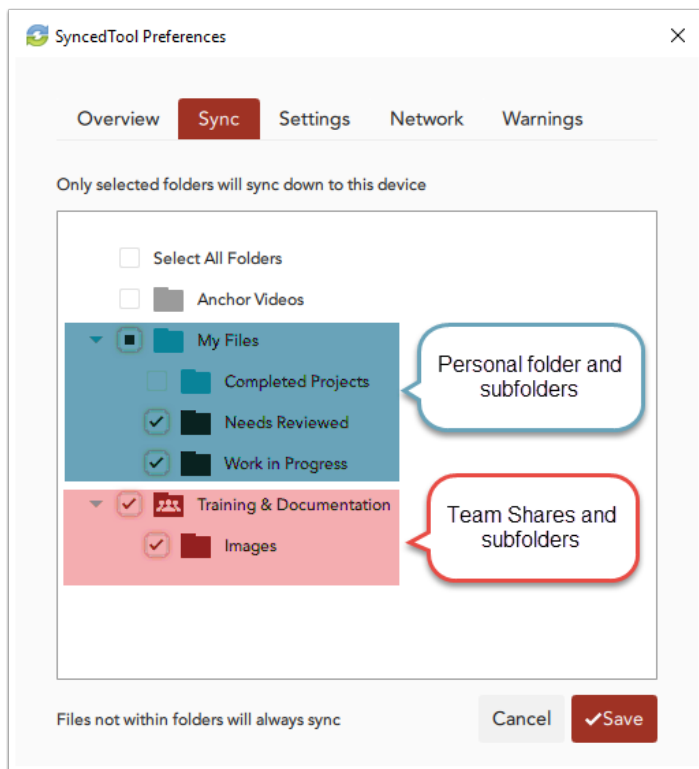
4. Click the Save button when you are finished selecting and deselecting content. A confirmation dialog box will display, notifying you that your device has been successfully updated.
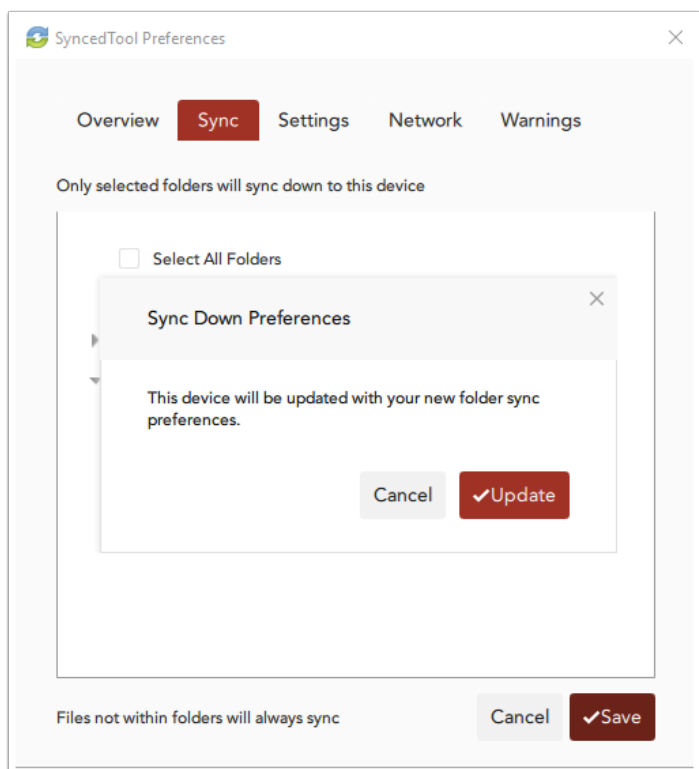
5. Click the Update button to confirm these changes. The desktop client will resync as appropriate.

Using the Web Preview Tool as an End User

Overview

When sending or receiving share links, or when working in the web portal, you can quickly view dozens of file types without leaving the Anchor web browser. Using Anchor's fully integrated Web Preview tool, you can access advanced viewing functionality without downloading content or navigating away from the system.

Use Cases

You can use the Web Preview tool to:

- Preview share links in a web browser—the Web Preview tool allows you to preview content sent through share links. When a recipient clicks to open a share link, he or she will have the option to view the item on the web without needing to download the shared content.
- Preview content when working in the web portal—with the Web Preview tool, you can preview your own content from the web portal without needing to download it to a local machine. This feature is particular useful in situations when you only want to store and manage Team Share content in the web portal, rather than sync it down to a registered desktop client.

In these ways, the Web Preview tool delivers significant value, as it reduces storage and bandwidth requirements, and enhances collaboration options between internal and external colleagues.

Prerequisites

Content can be viewed within the fully integrated Web Preview tool, which is supported in all VIT-Sync supported operating systems and web browsers. For supported file types, please reference the *Supported Formats* section below.

Instructions

How to Preview Shared Content

To view shared content using the Web Preview tool:

1. When you receive a share link, whether it was generated from the web portal or through the Outlook add-in, you can simply click the link to launch the file.
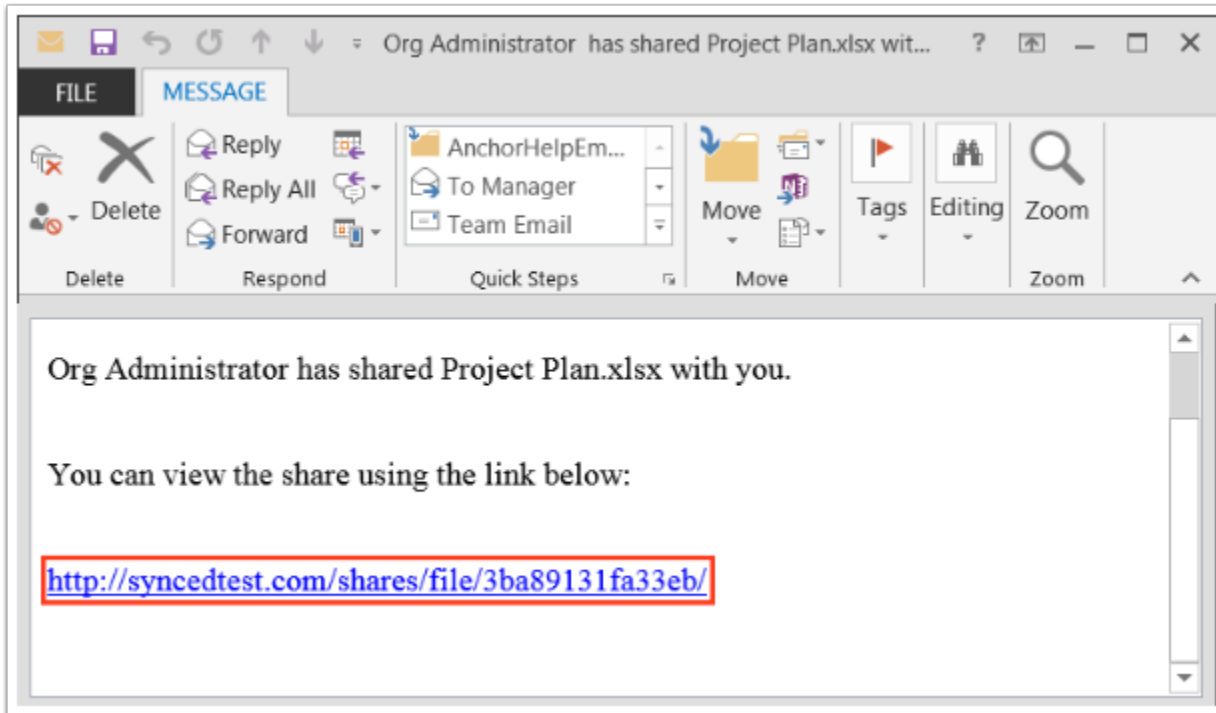
The file will open in the fully integrated Web Preview tool.
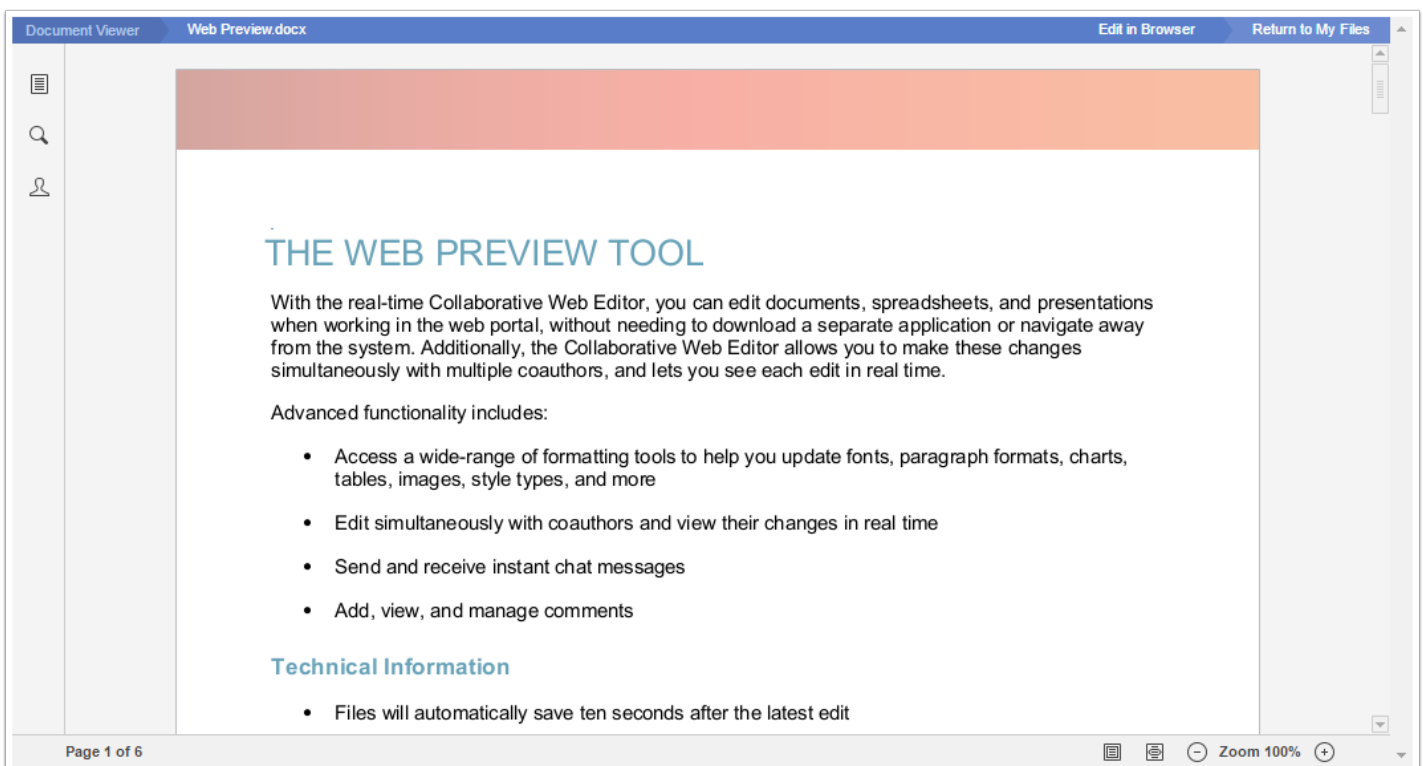
Microsoft Office Files (Word, Excel, PowerPoint)
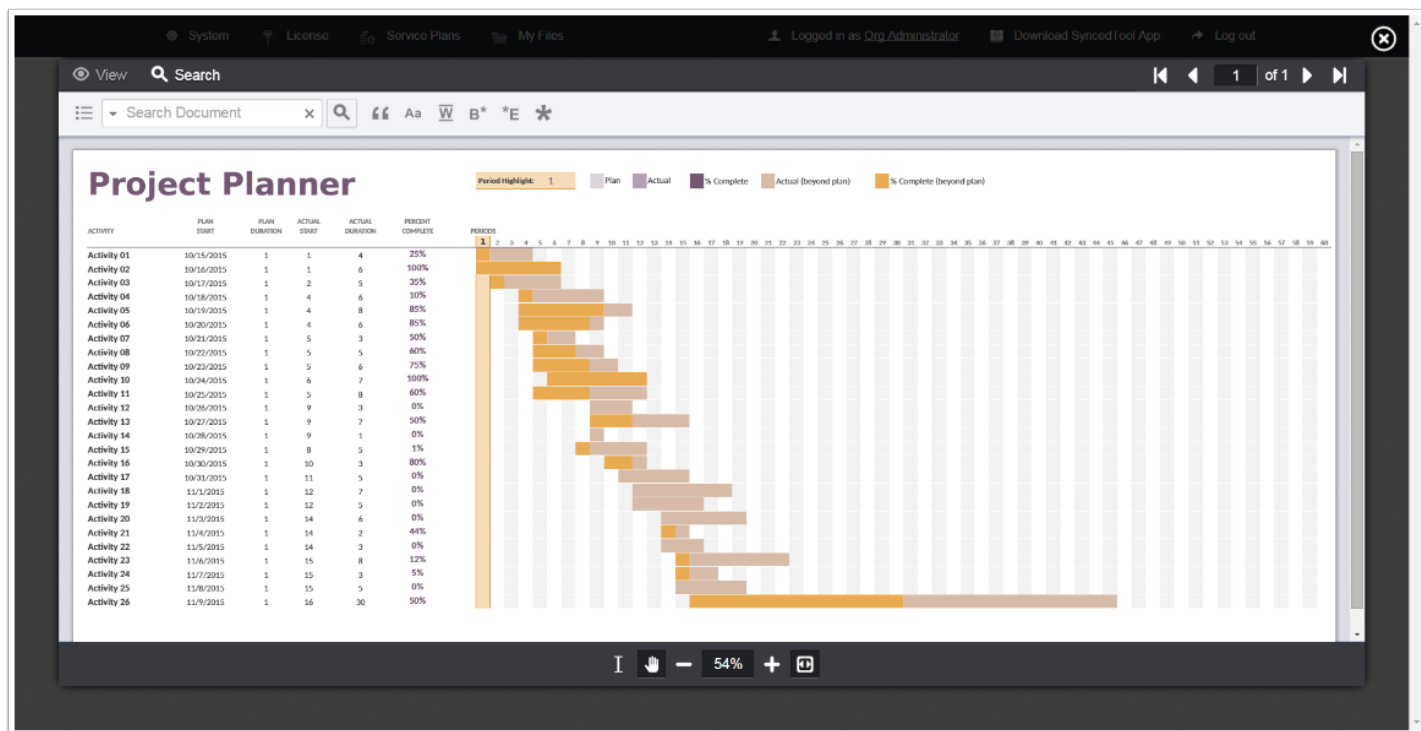
Other File Types

2. If you are previewing a Microsoft Office file, you can optionally click the Edit in Browser link to edit the file in the real-time Collaborative Web Editor.
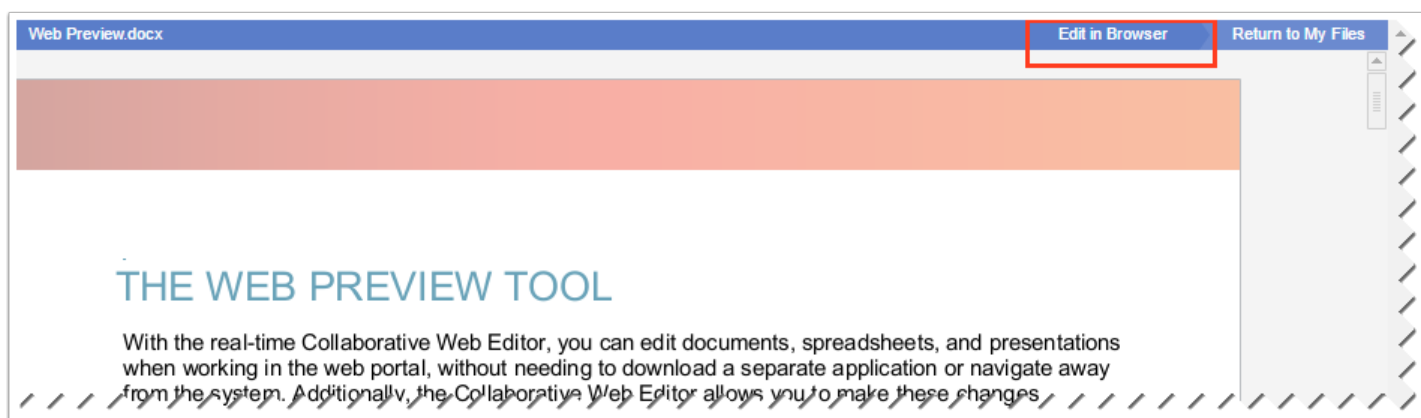
How to Preview Content in the Web Portal

To use the Web Preview tool in the web portal:

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

2. Right-click the file and select View; or, simply click the title of the file.
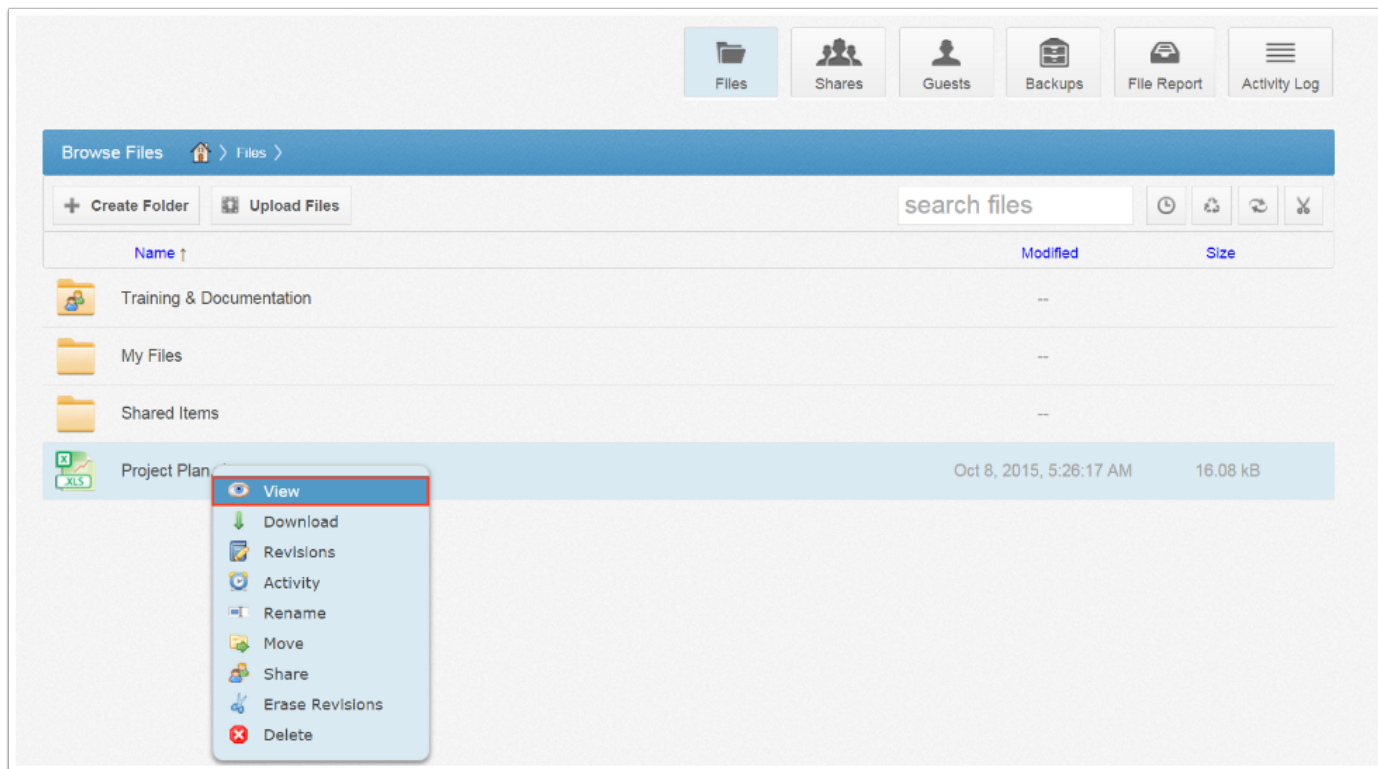
The file will open in the fully integrated Web Preview tool.
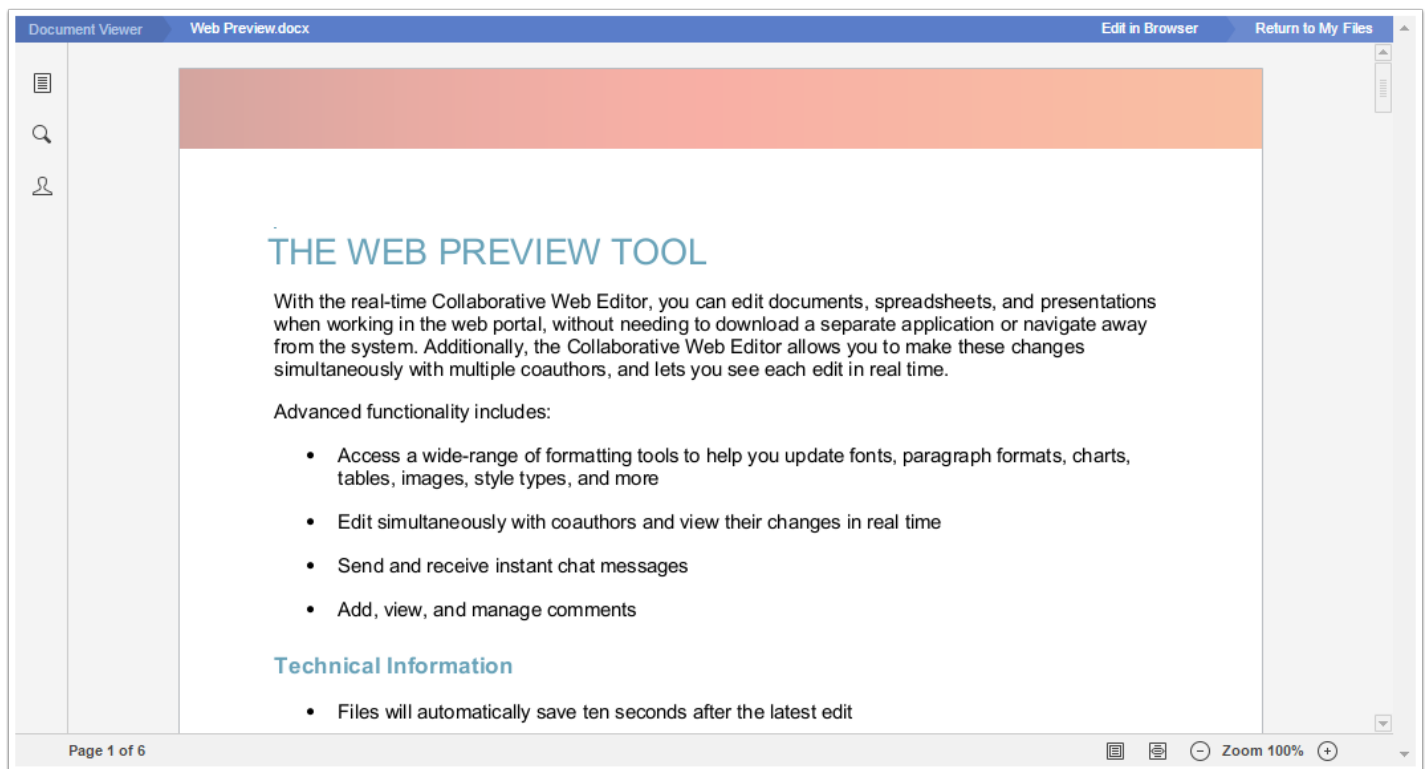
Microsoft Office Files (Word, Excel, PowerPoint)
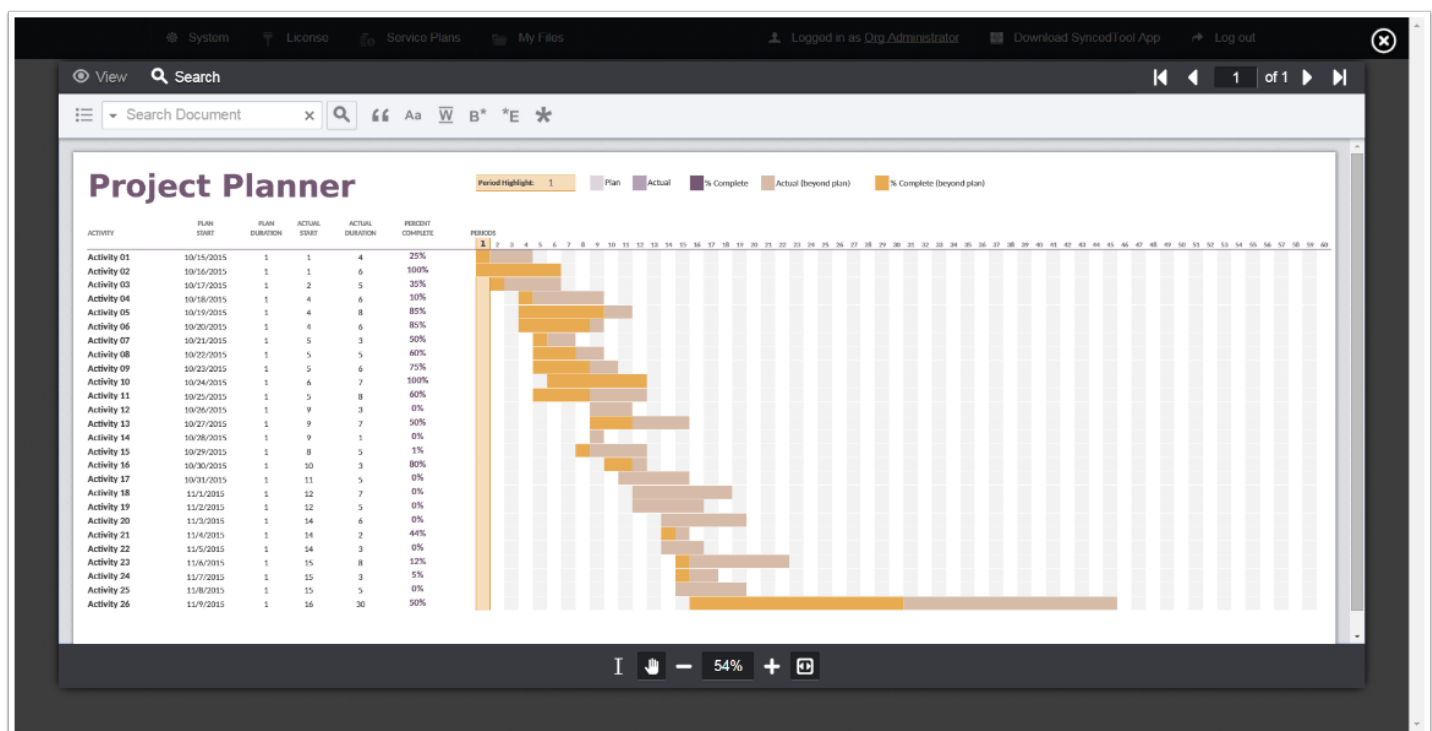
Other File Types

3. If you are previewing a Microsoft Office file (including Word, Excel, and PowerPoint), you can optionally click the Edit in Browser link to launch the real-time Collaborative Web Editor.
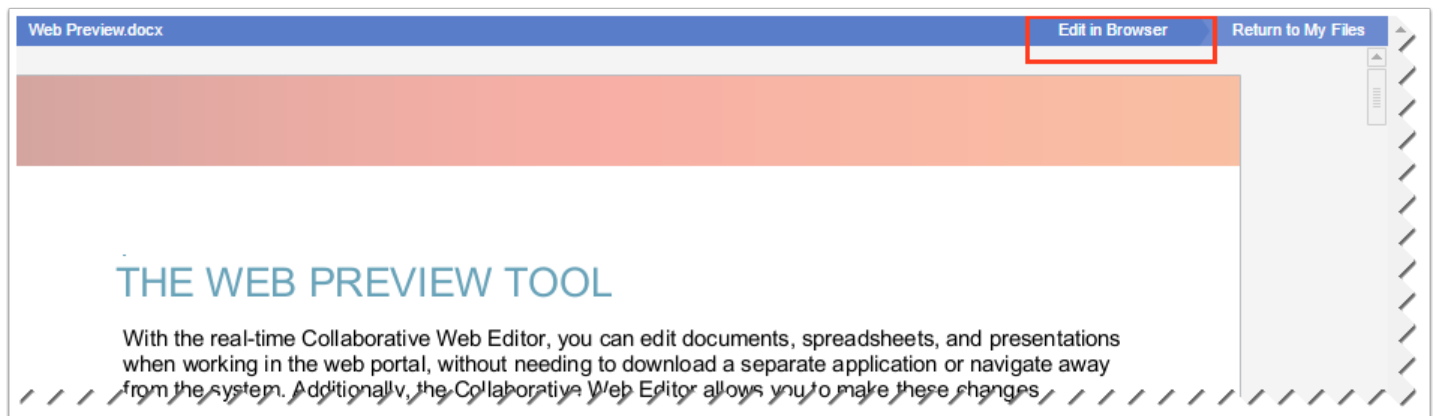
Advanced Preview Functionality for Special File Types

While Microsoft Office file types (Word, Excel, and PowerPoint) can be edited in the real-time Collaborative Web Editor, other file types can be previewed with advanced functionality directly within the Web Preview tool.

View Functionality

Click the **View** link to access advanced viewing options.

1. Click the [Thumbnail] button to see a list of all pages in the file.

2. Click the [Magnifier] button, and then drag your cursor, to see a close-up view of a specific area in the file.

3. Click the [Rectangle Zoom] button to zoom into a specific area in the file.

4. Click the [Rotate Document] button to rotate the entire file clockwise.

5. Click the [Rotate Page] button to rotate the current page clockwise.

6. Click the [Zoom Out] button to zoom out from the page.

7. Click the [Zoom In] button to zoom in to the page.
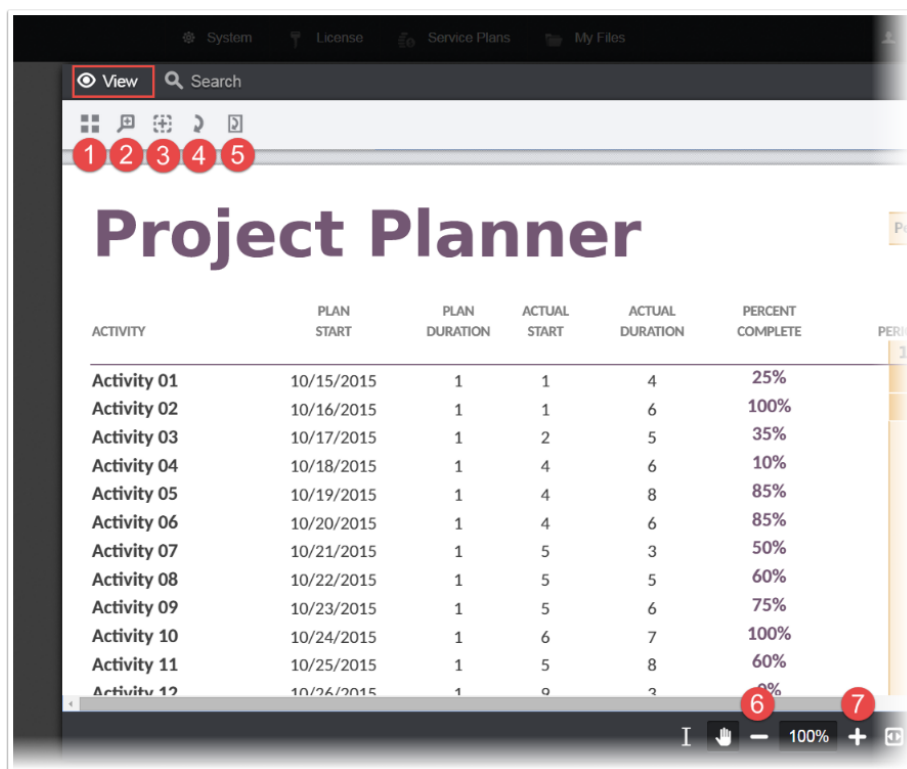
Search Functionality

Click the Search link to access advanced search options.

1. Enter your term in the [Search] field.

2. Optionally, click a [Field Search] checkbox to search for specific categories of information.

3. Optionally, use the [Parameter] buttons to customize your search, including:

- Match an exact word or phrase
- Match a letter case
- Find whole words
- Find words that begin with certain characters
- Find words that end with certain characters
- Utilize wildcard search ($*$ matches one or more characters; $?$ matches one character)
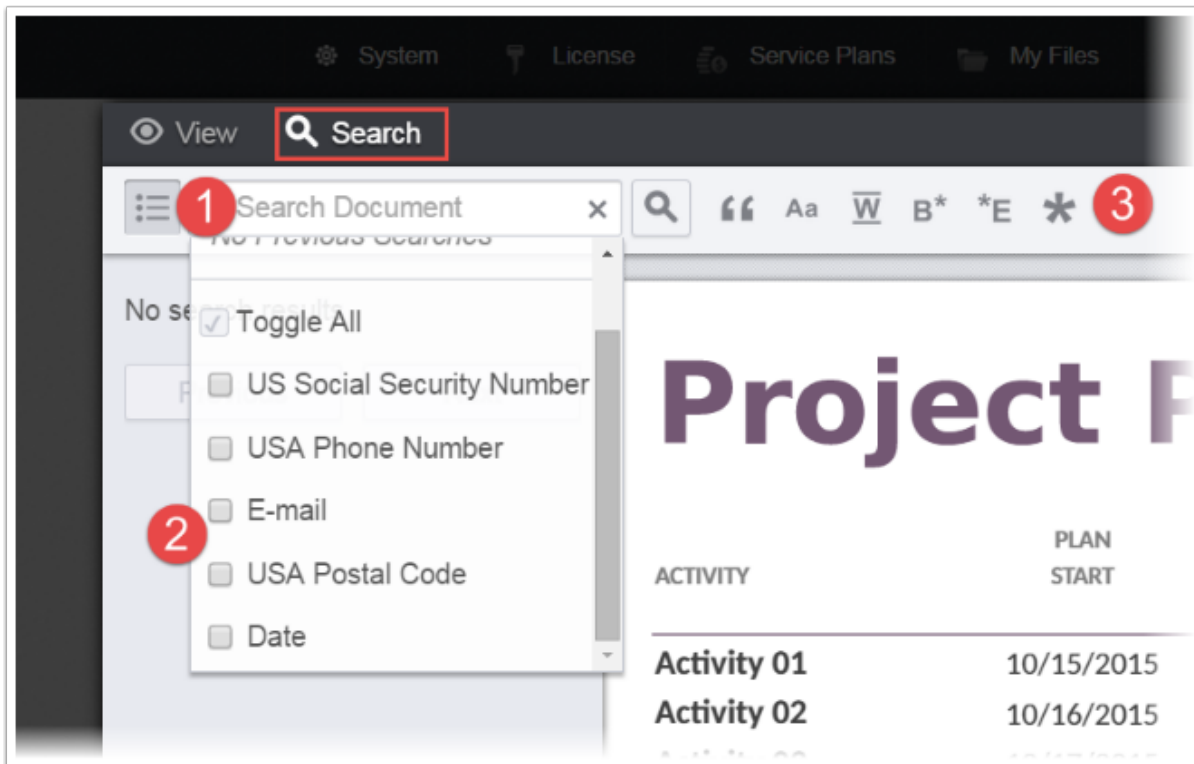
Cursor tools

Use the cursor tools to highlight text or adjust your page view.

1. Click the Select button to highlight and copy text.

2. Click the Pan Tool button to adjust your view of the file.
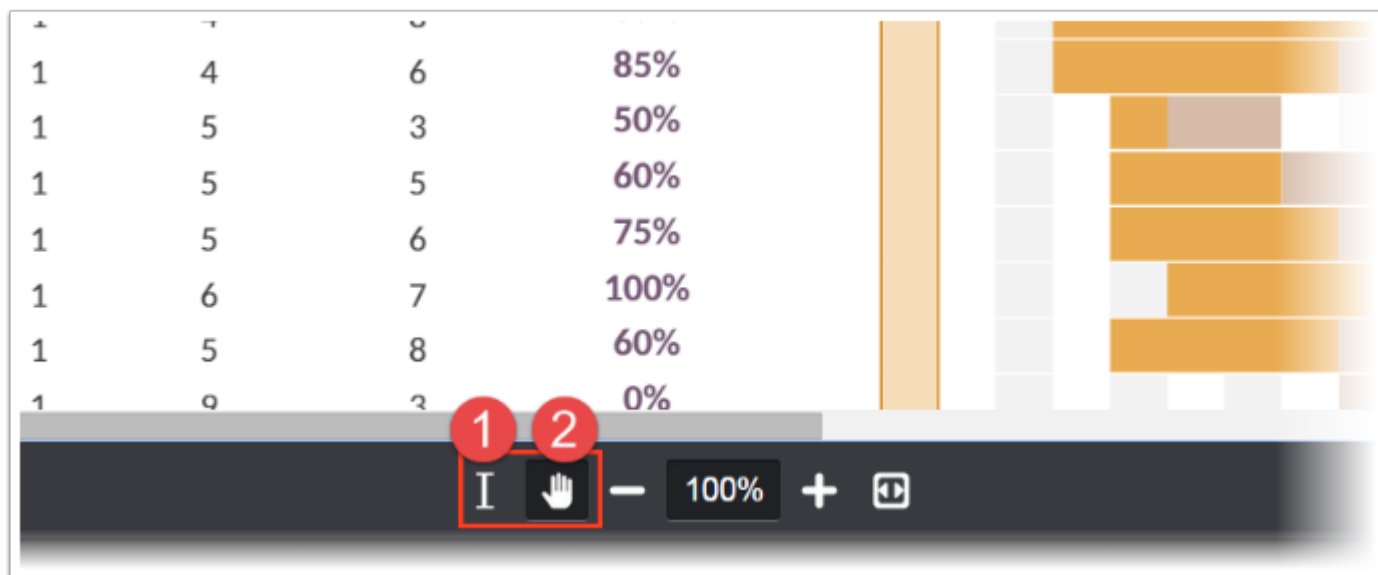
Additional tools

Use additional advanced functionality to manage your file.

1. Click the Print button to print the file to your local printer.

2. Click the Download button to download the file to your local machine.
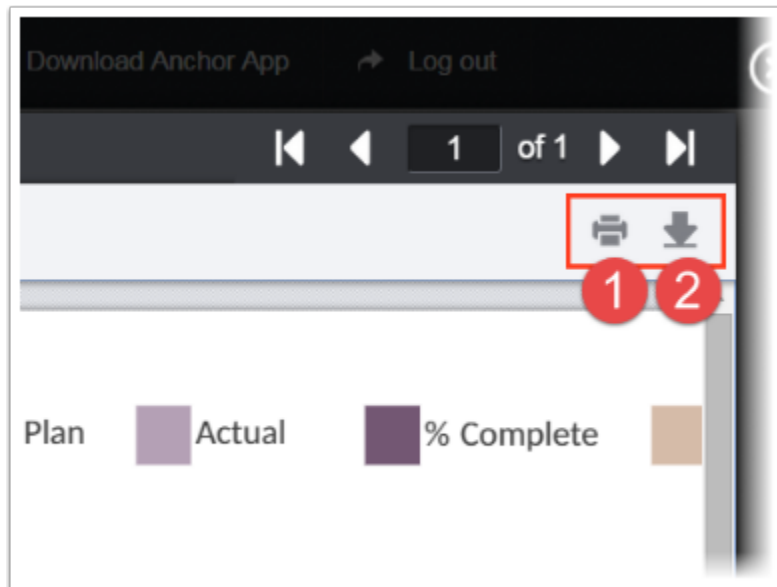
File and Image Formats

The following file types can be previewed in the web portal:

Document Formats	DOC	Microsoft Word binary files
	DOCX	Microsoft Word Open XML files
	XLS	Microsoft Excel binary files
	XLSX	Microsoft Excel Open XML files
	PPT	Microsoft PowerPoint binary files
	PPTX	Microsoft PowerPoint Open XML files
	RTF	Rich Text Format
	CSV	Comma Separated
	PDF	Adobe PDF
	ODT	OpenOffice Document

	ODS	OpenOffice Spreadsheet
	ODP	OpenOffice Presentation
	And more!	Many other older document formats
Web Formats	HTML	HTML files with embedded images
	SVG	Scalable Vector Graphics
Medical Image Files	DCM	Digital Imaging and Communications in Medicine (DICOM) image
Email Formats	EML	Email (with attachments)
	MSG	Email (with attachments)
Other Formats	TXT	Text files
CAD Formats	DGN	Support for V7 and V8 DGN (including V8 XM and V8I)
	DWG	Version 2.5 through 2014*
	DXF	Version 2.5 through 2014*
Image Formats	TIFF	TIFF (all compression types)
	JPG	JPEG
	JP2	JPEG2000
	GIF	Graphics Interchange Format
	PNG	Portable Network Graphics
	RAS	Sun Raster Image [.ras]
	CAL	CALS Type 1
	MIL	CALS Type 1
	DIB	Device Independent Bitmap
	BMP	Device Independent Bitmap
	PSD	Adobe Photoshop
	PCT	Apple Graphics
	PCX	PCX

	DCX	DCX
	PCD	Kodak Photo CD
	WMF	Windows Metafile
	EMF	Enhanced Metafile
	TGA	Targa
	And more!	Many other formats

ℹ️ *Note: While not officially supported, later versions of these file formats typically render as expected.

How to Use the Collaborative Web Editor

Overview

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

Advanced functionality includes:

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

You can launch the Collaborative Web Editor from the web portal, the desktop client, and mobile apps.

Technical Information

Revisions

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

Organization Policy Settings

You must turn on the *Enable Web Editing* policy to allow user accounts to access the Collaborative Web Editor feature from the web portal.

Anonymous Editing Permissions

When sharing a file, users can grant anonymous editing permissions on public share links. Anonymous editing permissions allow anyone with access to the share link to edit the file using the Collaborative Web Editor. For more information on shared folder permissions, please reference the [Creating Share Links as an End User](#) article.

Notifications and File Locking

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

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

Supported File Formats

Supported file formats include:

.docx	.xlsx	.pptx	.rtf
.odt	.ods	.txt	.csv

> ℹ️ Note: Older versions of Microsoft Office files, including .doc, .xls, and .ppt files, cannot currently be opened in the Collaborative Web Editor. As a workaround, we recommend opening these older file formats on a machine to which they are syncing, and then re-save them to a more current format (.docx, .xlsx, and so forth). After conversion, these files can be edited with the Collaborative Web Editor.

Instructions

Launching the Collaborative Web Editor

To use the Collaborative Web Editor:

1. From the desktop client, navigate to the file you want to edit. Right-click the file, point to the content menu, and select [Open in Web Editor].
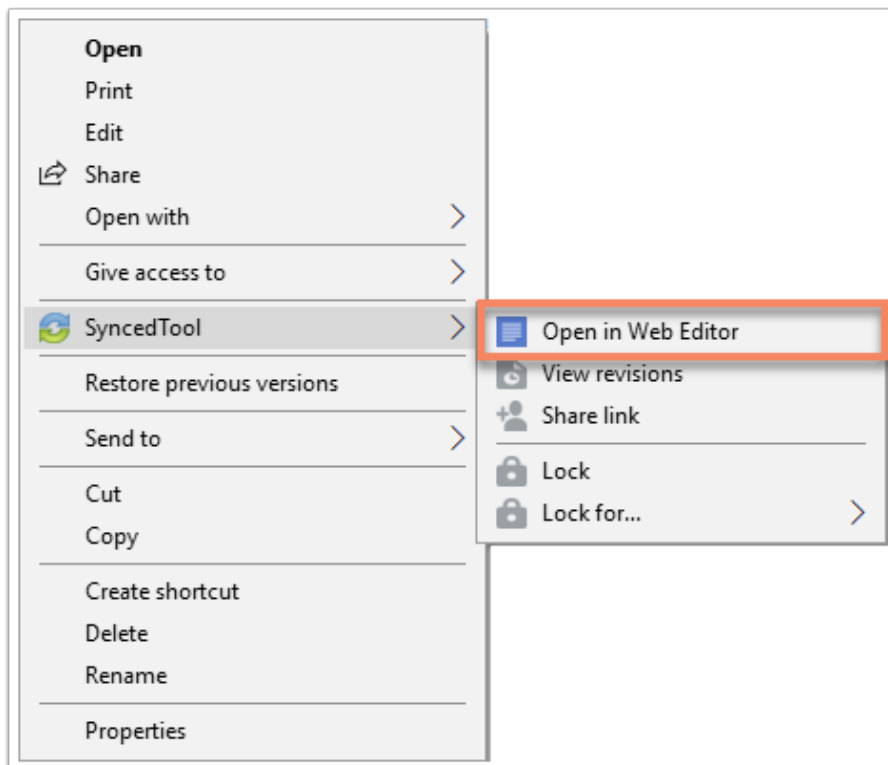
2. Alternatively, if you are working in the web portal, right-click the file and select [Edit].

The file opens in a new tab.
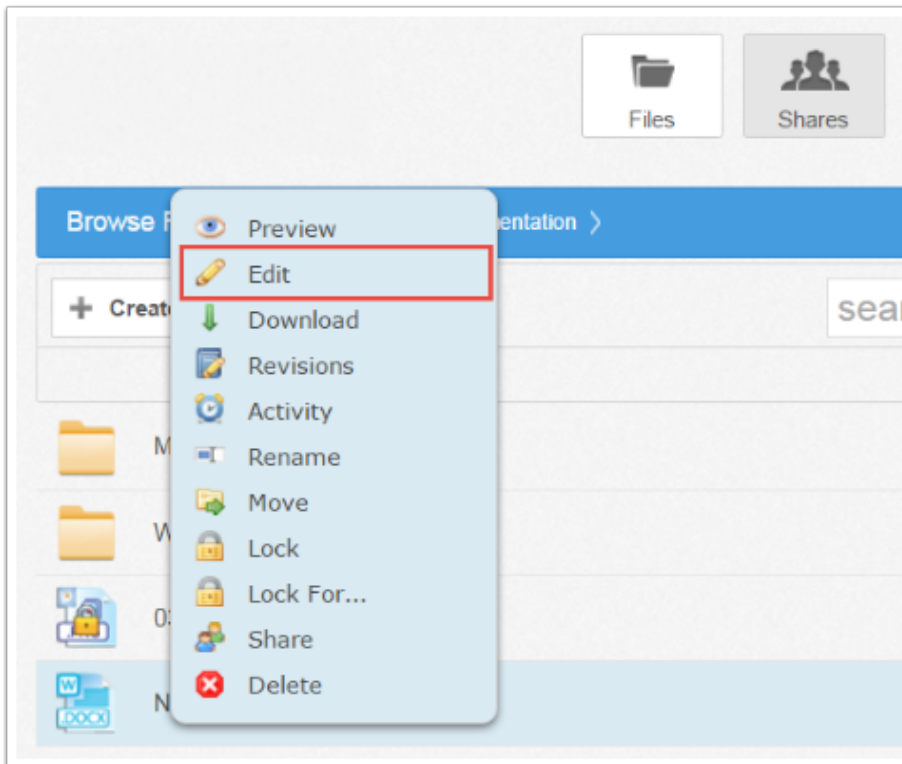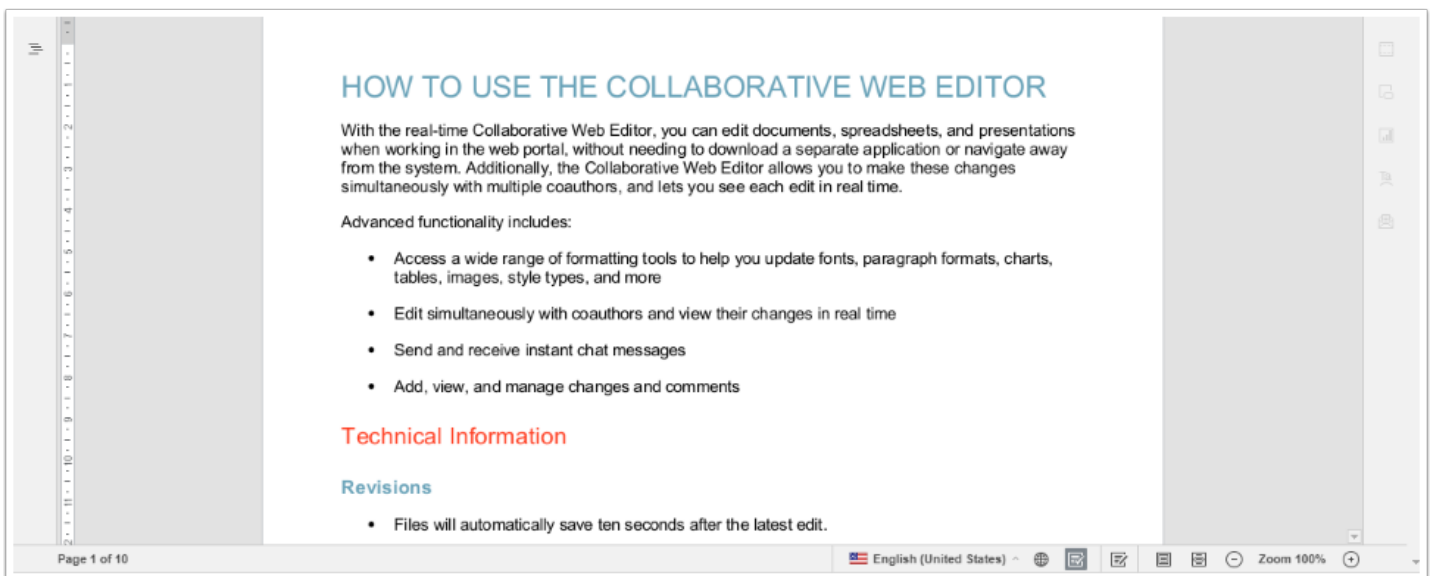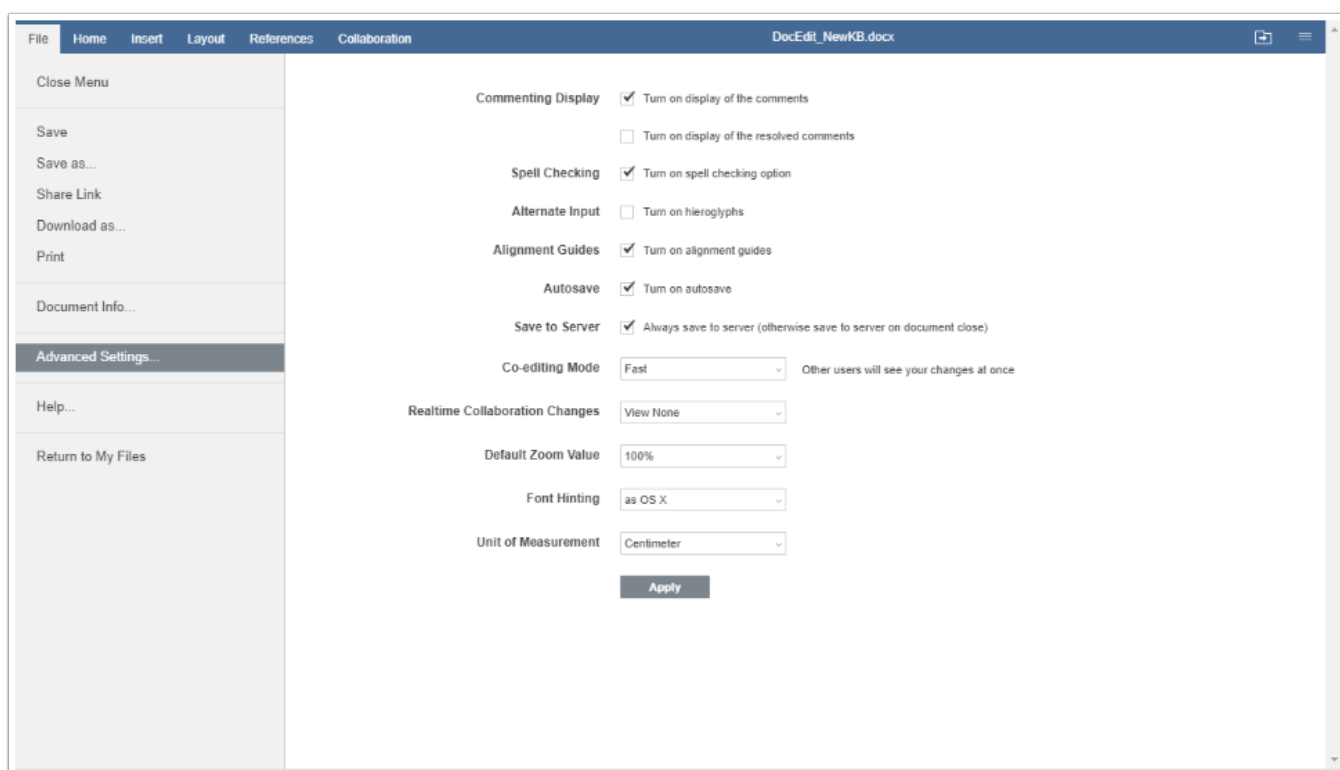
3. To configure advanced settings, click the [File] tab. The left-hand navigation bar expands.

4. In the left-hand navigation bar, click the [Advanced Settings] link to turn on and off features, such as commenting, spell check, auto-save, and so forth. You can also choose to view or disable real-time collaboration changes.

5. While still in the Files section of the tool, you can:

1. Click **Save** to save the file.
2. Click **Save as** to save the file with a new name. You will also be given the option to save the file to a new file format or a new location (within the same root folder). *
3. Click **Share Link** to generate a share link for a standard user or guest user. The recipient will be given privileges to co-edit the document using the Collaborative Web Editor. For instructions on configuring share links, please reference the Creating Share Links as an End User article.
4. Click **Download as** to download the file to your local machine. You will be presented with the option to download the file in your preferred file format.
5. Click **Print** to print the document using your preferred printing device.
6. Click **Help** to view a comprehensive listing of all available functionality.

6. Click the Close Menu link to collapse the left-hand navigation menu.

Inviting Coauthors to Collaborate

To collaborate on a single file in real time, you can create a share link from the web portal or your desktop client. For more information, please reference the Creating Share Links as an End User article.

You can also invite users to collaborate from within the Collaborative Web Editor:

1. Click the File tab and select Share Link.
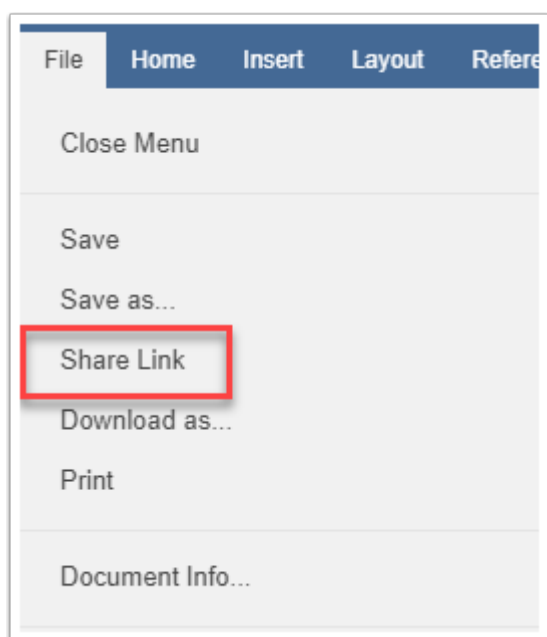
The *Share Access* dialog box displays.

2. You can create a public share link to allow anonymous users to edit the file.

1. Select the **Public Share URL** radio button, and then click the **Copy** button to ensure that you capture the URL of the file. .
2. Select the **Allow anonymous users to edit files** checkbox to let anyone who launches the share link to edit the file using the Collaborative Web Editor.

3. Click the **Share** button to save your settings. You will then be able to paste the share link in an email, chat, or other messaging device.

3. Alternatively, you can create a secure share link to require recipients to log in:

1. Select the **Secure Share** radio button.
2. In the *Recipients* field, enter the name of the coauthor. The name of this new user will display in the lower portion of the screen
3. Ensure the *Can Modify* checkbox is selected. The *Can Modify* permission allows this user to edit the file.
4. In the *Share Options* section, select **Secure Share.**
5. Click the **Share** button to send the share invitation to the recipient(s).
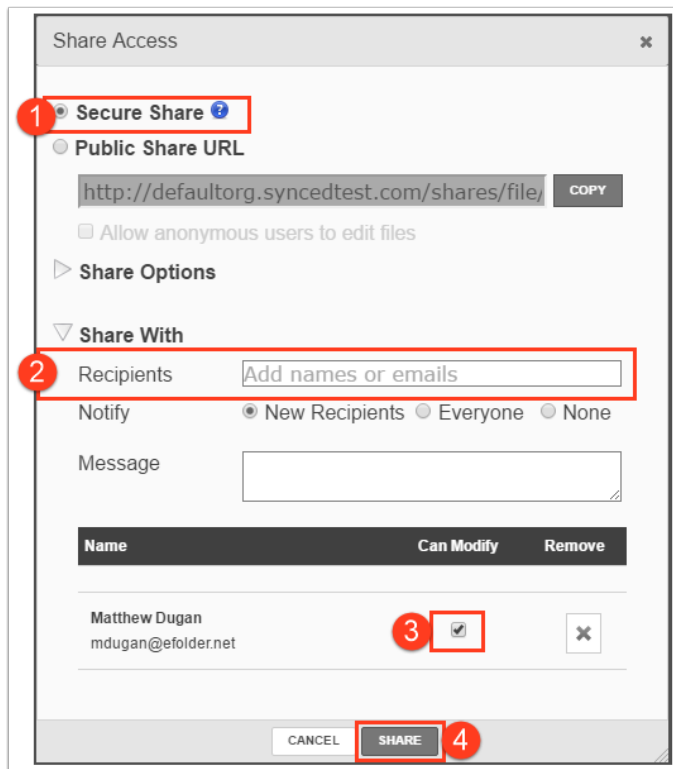
4. To view a list of coauthors who are actively editing the file, click the View Users button.

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

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

Chatting with Coauthors

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

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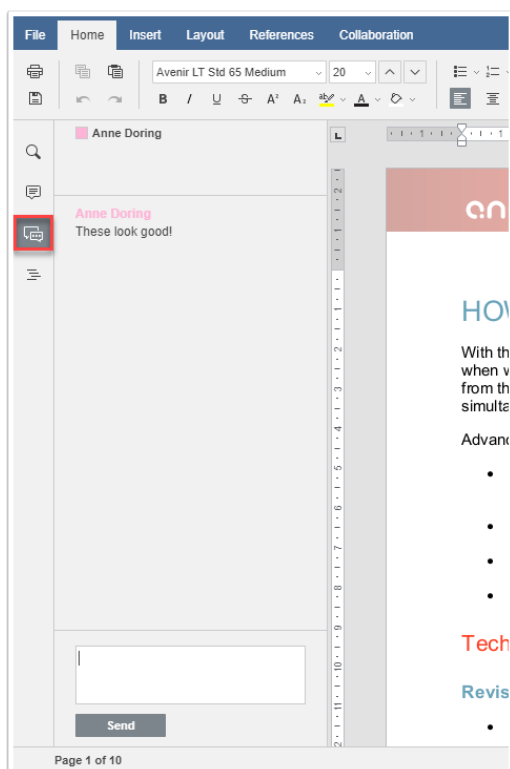
2. In the left-hand navigation bar, click the Chat button to reveal the chat window.

Editing with Coauthors

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

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

1. In the left-hand navigation bar, click the [Chat] button to reveal the chat window.
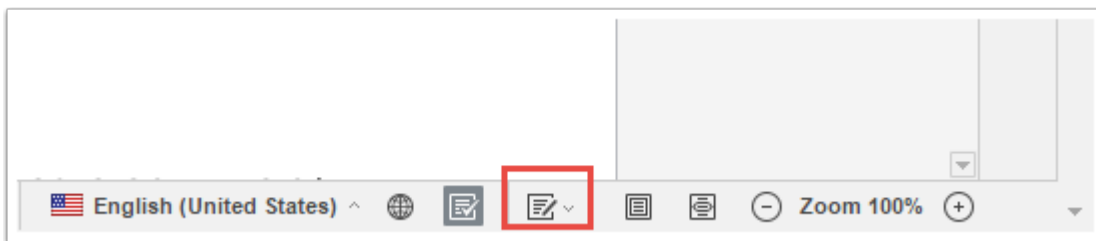
All changes made by you and coauthors will display in bubbles, allowing other users to accept or reject these changes.
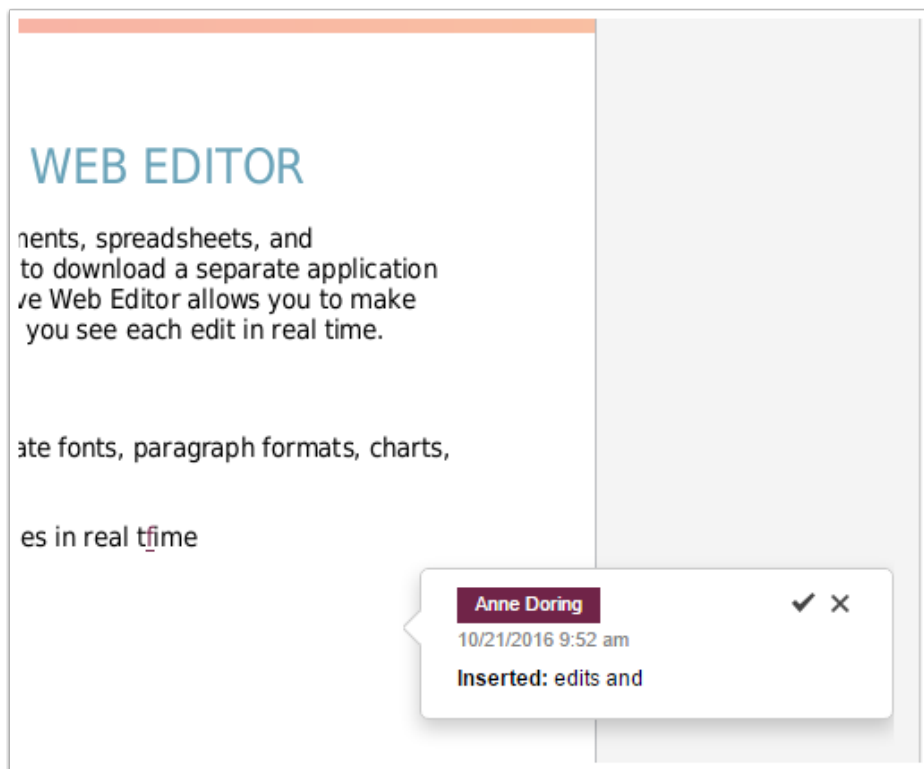
2. To add a comment, highlight the appropriate portion of the file, right-click the highlighted content, and then select [Add Comment].
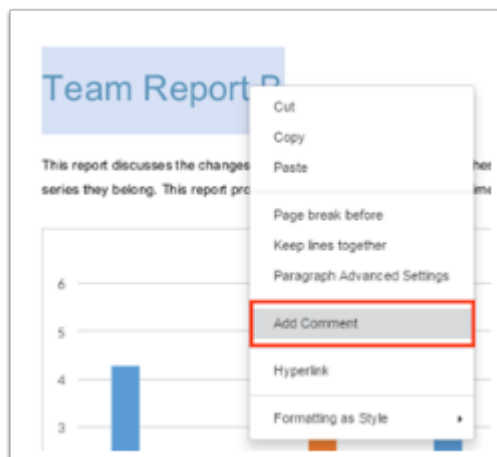
A pop-up bubble displays, allowing you to type a comment.

3. To view all comments in the document, or to respond to an existing comment, click the [Comments] button in the left-hand navigation bar. You can use the toolbar to edit, delete, or mark a comment as resolved.
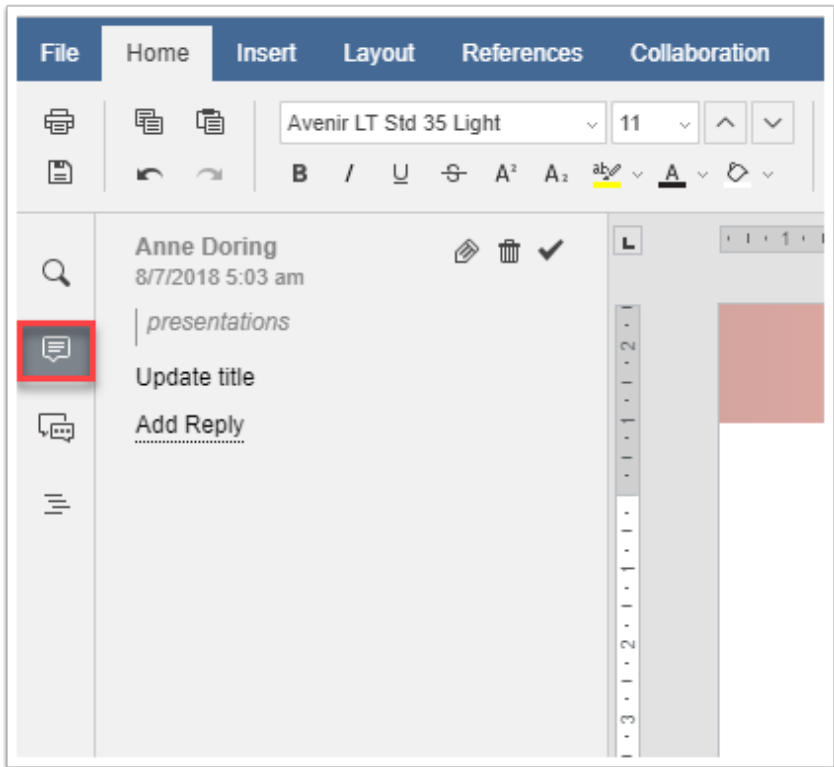
Viewing and Restoring a File Revision

Overview

VIT-Sync captures revisions (versions) of each file stored in the system, allowing users to view or restore older revisions if necessary. The Revisions feature is one of many data protection features available to end users.

Instructions

To view and restore file revisions (versions):

1. In the web portal, right-click a file and select Revisions.
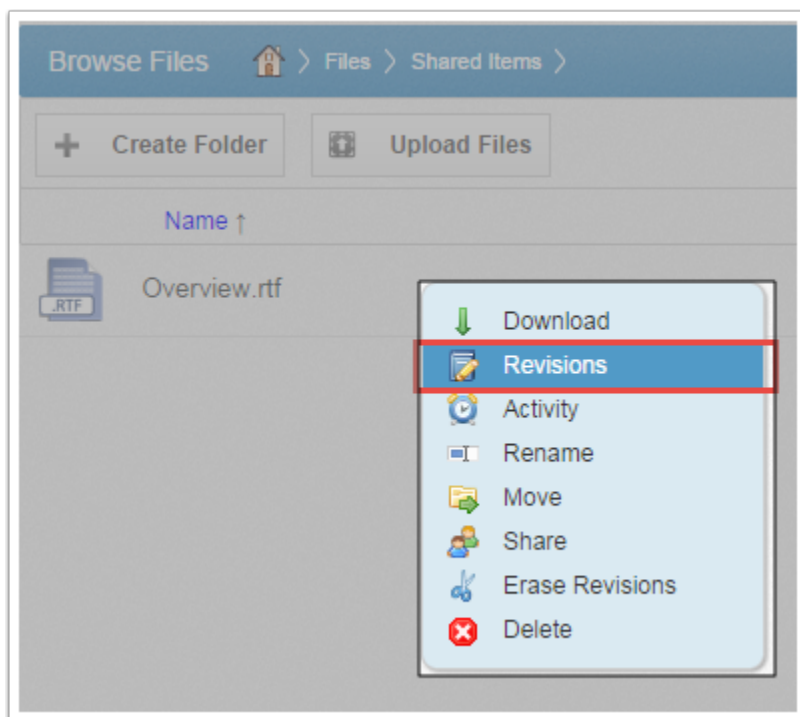
Alternatively, in Synced Folder, right-click a file, point to the *Synced Folder* menu, and select **Revisions.**
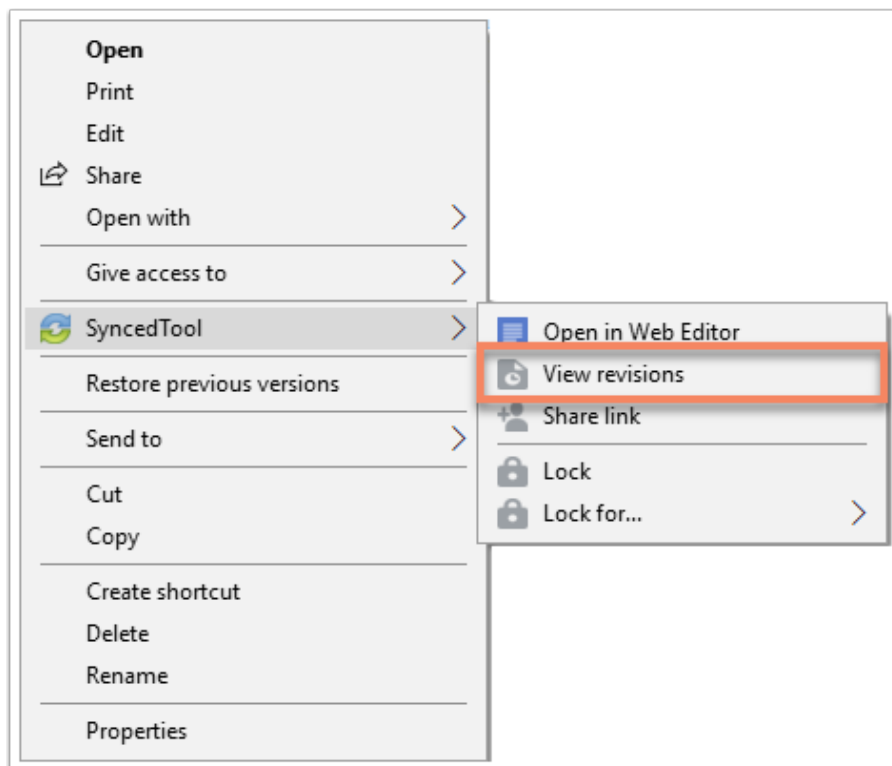
The *Browse File Revisions* page displays, listing all revisions of the file.

2. In the Browse File Revisions page, use the Download Revision and Restore Revision links to manage file revisions.

- Click the **title** of the file to view the file in the Web Preview tool. The Web Preview tool will allow you to quickly review the content of the revision without needing to download the file to your local machine.
- Click the **Download Revision** link to download a previous revision. The file will download, and you can review the previous revision.
- Alternatively, click the **Restore Revision** link to overwrite the current file with the previous revision. The overwritten revision will still be listed as a revision in the *Browse File Revisions* page.

Viewing and Restoring Deleted Files and Folders

Overview

Depending on policy settings, end users can view and restore deleted files from within the web portal. The ability to view and restore deleted content is one of many data protection features available to end users.

Instructions

To restore files and folders as an end user:

1. In the web portal, click the Files tab. The Browse Files page displays.

2. In the toolbar, click the Show Deleted button.
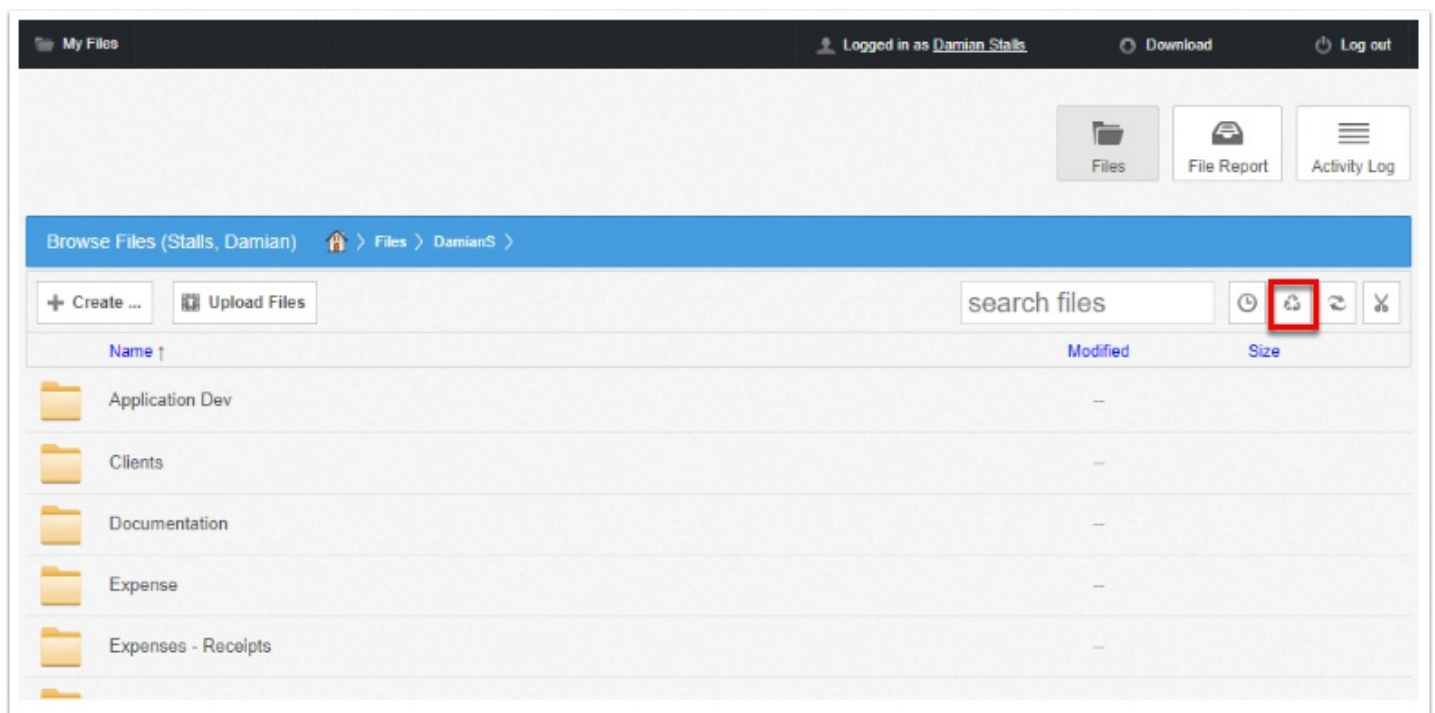
The deleted files and folders display as semi-transparent.
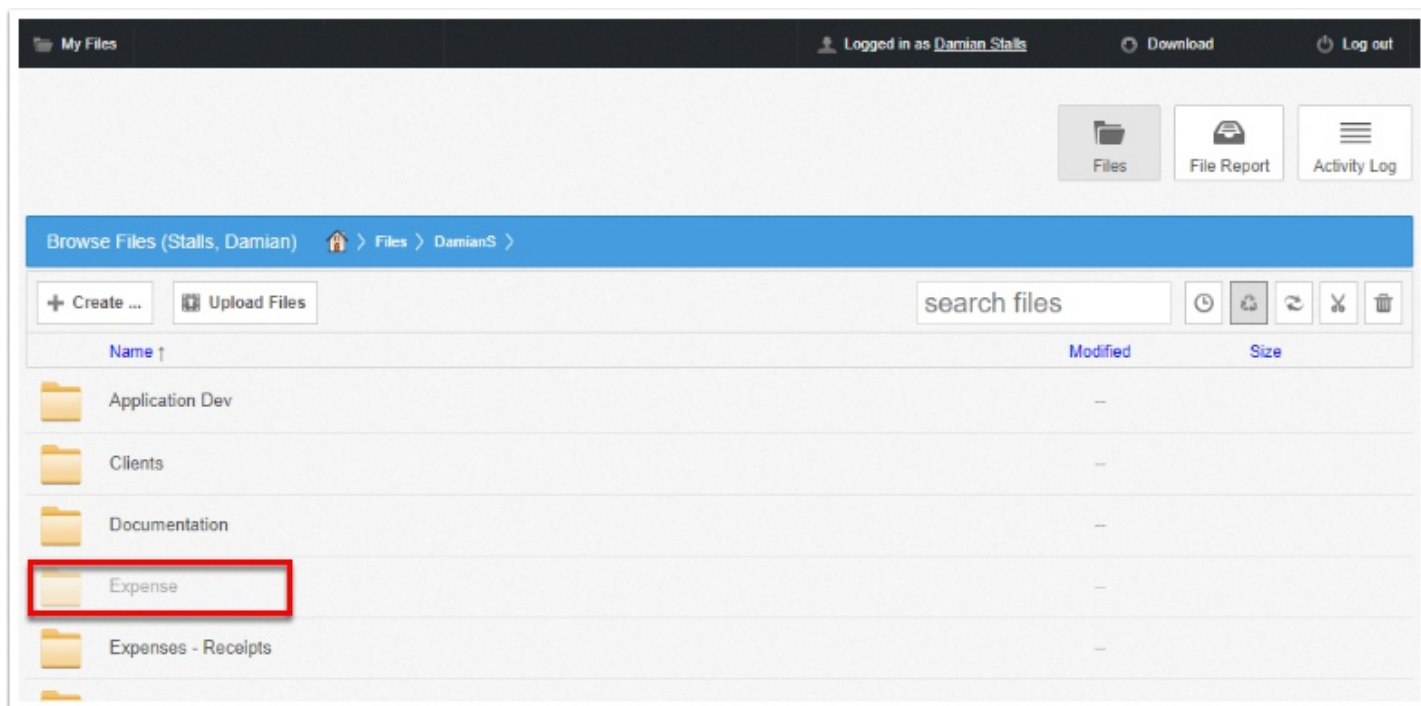
3. Right-click an individual file and folder and select the Restore link.
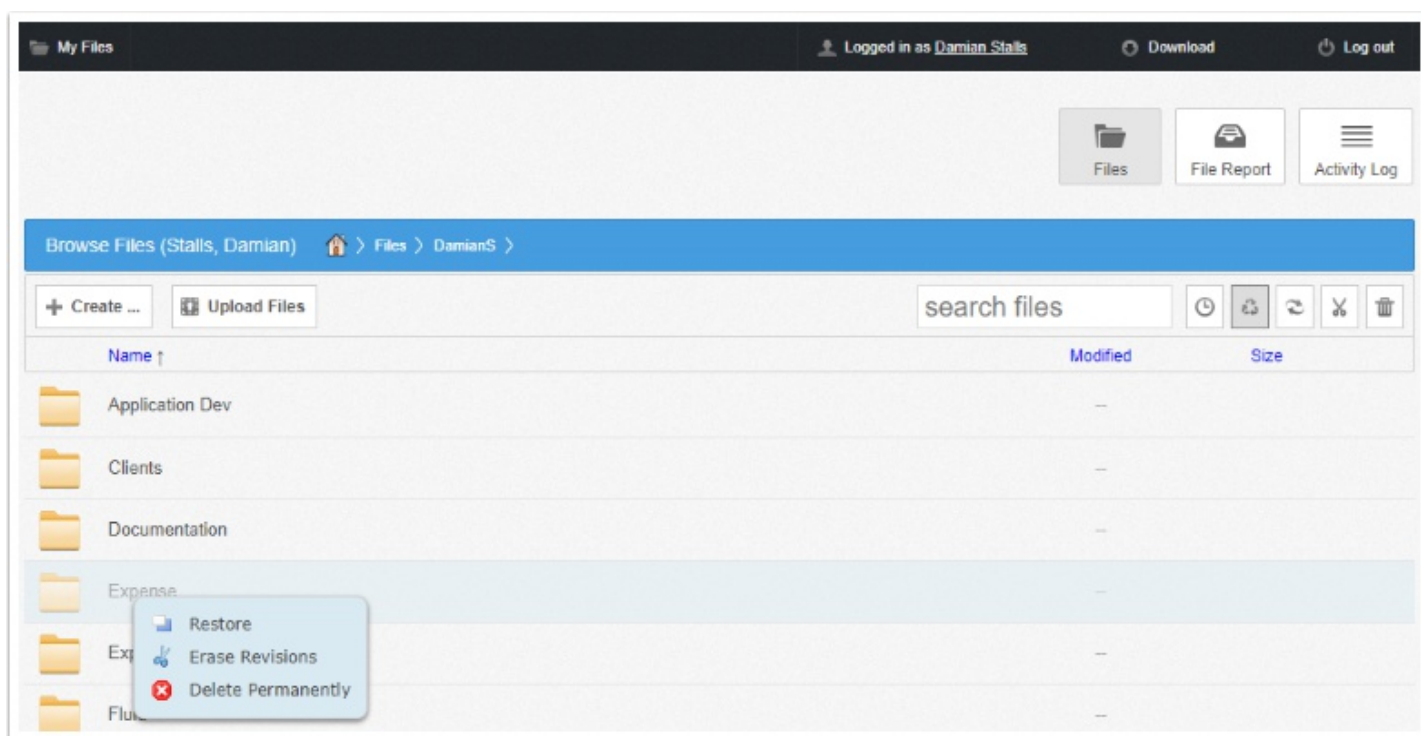
4. Alternatively, to restore all deleted files in the current folder, click the [Restore Deleted] button in the toolbar. The Restore Files dialog box displays, allowing you to restore all deleted files, or certain files deleted between a specified time frame.
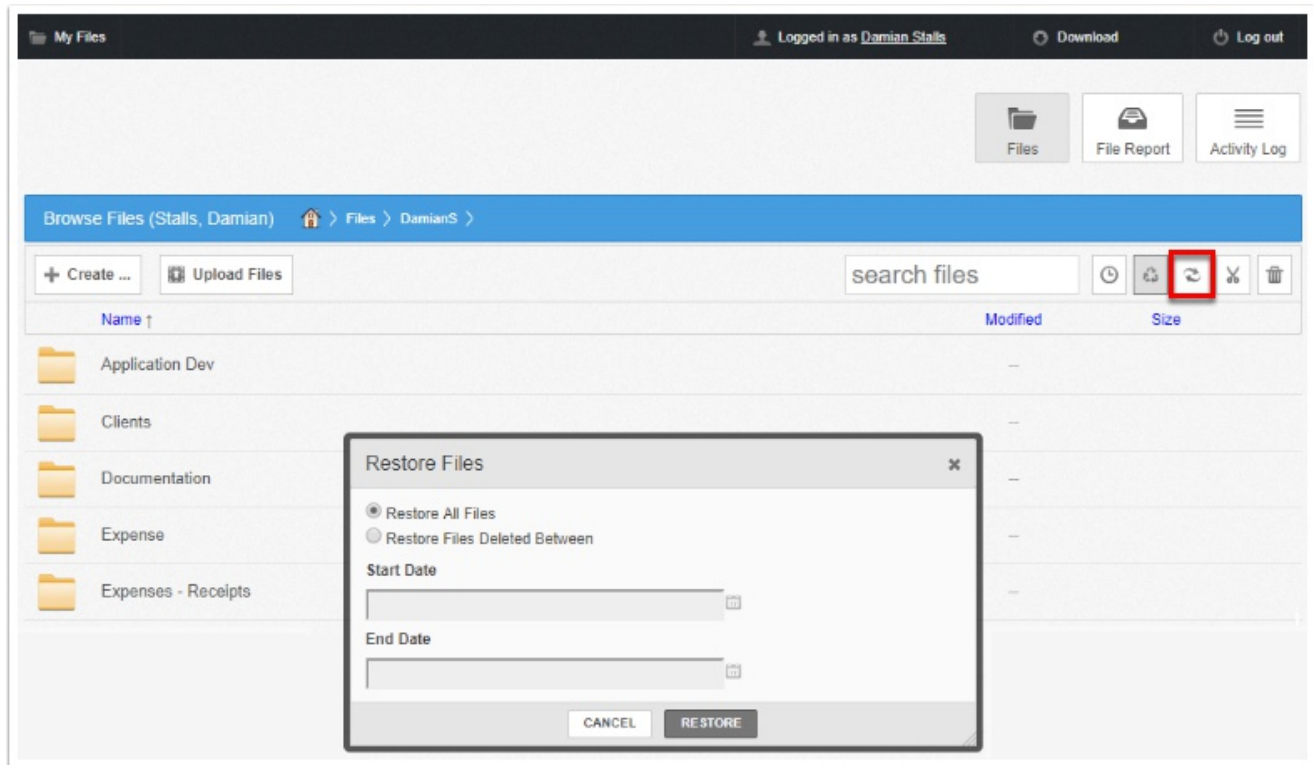
The selected files and folders will be restored.

Locking Files and Folders

Overview

Anchor allows users to place locks on files and folders in Team Shares, giving subscribers the ability to set read-only permissions on shared content. This feature prevents other Team Share subscribers from editing and overwriting content while changes are being made. When an item is locked, a lock icon is placed over the file or folder, alerting other Team Share subscribers that it is in read-only mode. Locks are enforced across desktop clients, the web interface, and mobile devices, but administrators always have the ability to unlock a file or folder if necessary.

If a user forgets to lock a file or folder before making changes, a file sync conflict could occur. For more information, please reference the [How Do I Manually Resolve a File Sync Warning](#) Knowledgebase article.

Use Cases

Locks can be used in multiple ways to improve and support collaboration in Team Shares. For example:

1. Temporarily Lock a Single File
   * When editing a file in a Team Share, the locking feature can be used to temporarily set read-only permissions on the file, preventing other Team Share subscribers from making changes and overwriting your work. The *Auto-Locking* and *Lock For* options allow you to automatically expire a lock after a certain time period.

2. Permanently Lock a Single File
   * In some instances, a certain Team Share file might need to be shared with—but never edited by—subscribers. For example, you might decide to set a permanent lock on a form or a template so that it can never be edited or deleted.

3. Lock an Entire Folder or Team Share
   * Not only can you lock an individual file, but you can also place a lock on a folder or a Team Share. For example, you might decide to dedicate an entire Team Share—or a subfolder within a Team Share—to read-only information, such as HR forms.

Instructions

Auto Locking Team Share Content

If the *Auto Lock* feature is turned on for a Team Share, the system will prompt users to lock files each time an item is opened. Administrators must turn on this feature for each individual Team Share.

Expected Behavior

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

> ⚠️ **Warning**: In certain instances, when a file closes or crashes unexpectedly, the *Auto Lock* feature may not operate as expected during subsequent file launches. This behavior is caused by a Microsoft limitation, and cannot be resolved by the eFolder team.

When working with the *Auto Lock* feature:

1. Click to open a supported Microsoft file in a Team Share. You will be presented with a dialog box that will prompt you to lock the file.
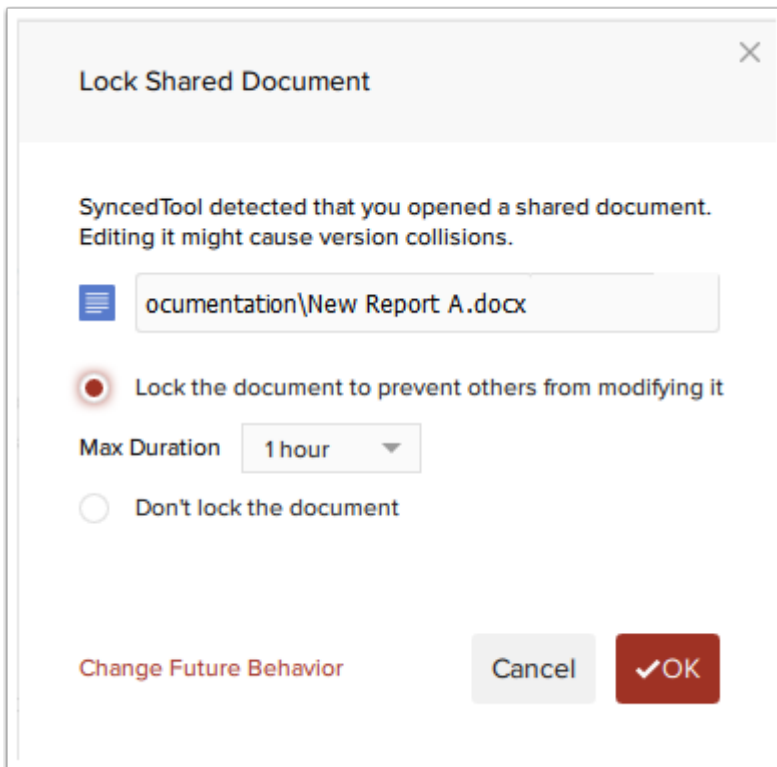
2. Click the Lock the document radio button to confirm the lock, and to enforce the lock while you are working on the file.

You can also select a **maximum lock time period** in the *Max Lock Duration* drop-down menu to determine how long the auto-lock will be in effect. You can select from 1 hour (default), 2 hours, 4 hours, or 8 hours. After the time period has expired, the auto-lock will expire.

ℹ️ Note: No matter which time period you select, the file will automatically unlock as soon as you close the file.

3. Click the Don't lock the document radio button to keep the file unlocked.

Remember that when you make changes to an unlocked file, you might encounter instances where another user makes changes to the same file at the same time, which will cause a file sync conflict. For information on file sync warnings, please reference the [Manually Resolving a File Sync Warning](#) Knowledgebase article.

4. Optionally, click the Change Future Behavior link to configure personal preferences for locking files.

5. Click the OK button to confirm your preference, and then edit your file as appropriate. When you close the file, it will automatically unlock, and will then sync to then serve

Manually Locking Team Share Content (Setting Read-Only Permissions)

You can also manually lock files and folders within Team Shares. Manual locks allow you to set read-only permissions at any level of a Team Share. You can manually lock files on both Windows and Mac machines.

ℹ️ Note: When you manually lock a file or folder, you must remember to also unlock the file or folder when you are finished.

To manually lock files and folders in the desktop client:

In the desktop client, right-click the Team Share item, point to the sync menu, and select Lock.
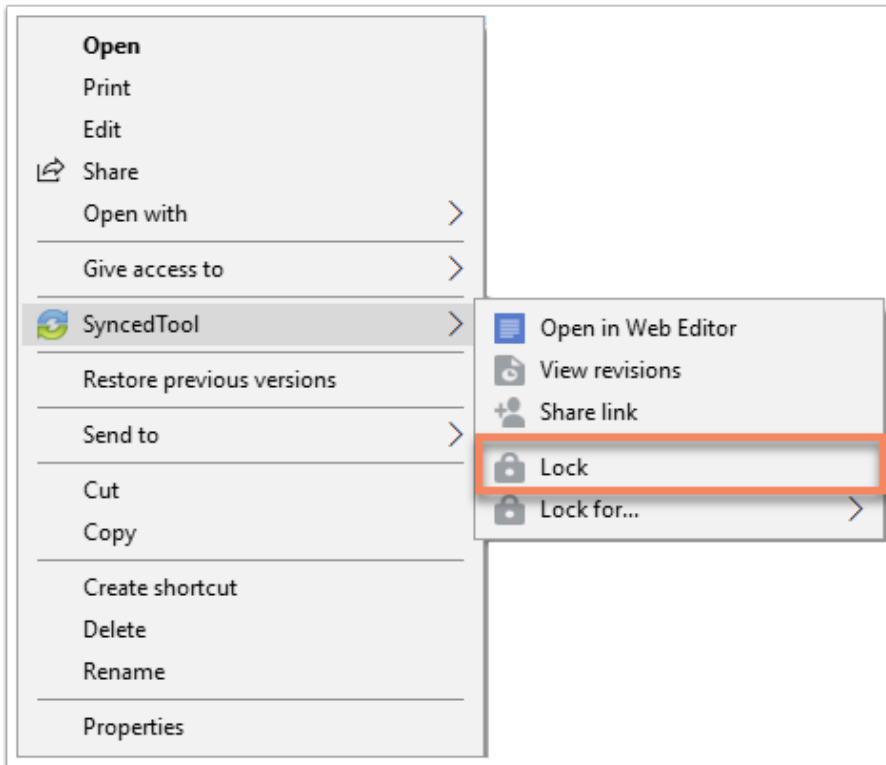
Alternatively, to lock the folder or file for a specific amount of time, point to Lock for, and select a time period, including: 30 minutes, 1 hour, 3 hours, 6 hours, or 1 day. When you utilize this option, you won't need to remember to manually unlock the file or folder.

To manually lock a file or folder in the web portal:

In the web portal, right-click the item, and select lock. The item is now locked, and is read-only for everyone else in the share.
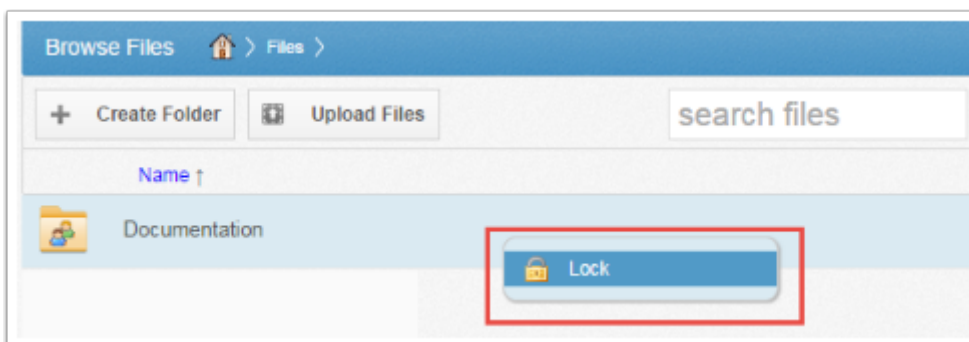
When you are finished editing, you must unlock the item. To unlock the item, right-click the file or folder again, and select unlock.

Viewing Information About a Locked File

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

In the desktop client, right-click the Team Share item, point to the sync menu, and select Lock Info.
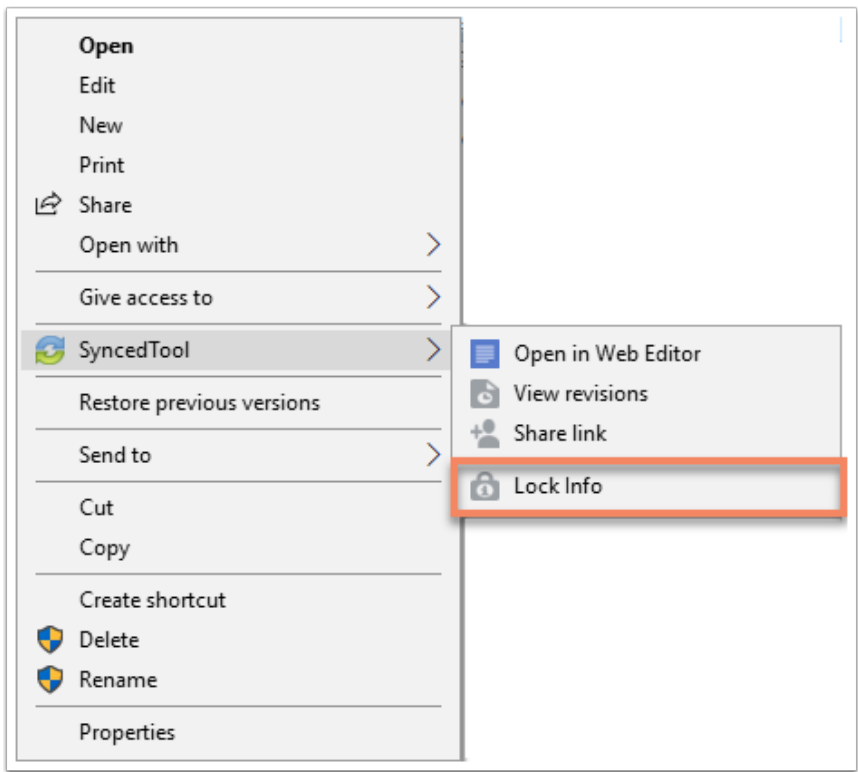
A dialog box displays, giving you information about who locked the item, where the item was locked, and when the lock expires.
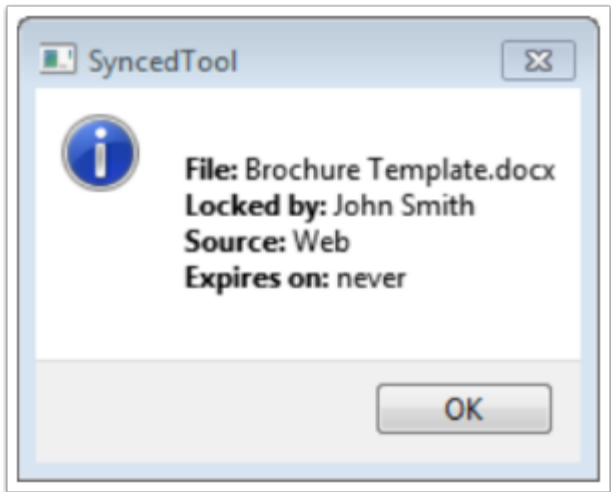
When you are working in the web portal, you can view this same information about who locked the file or folder.

> In the web portal, right-click the item, and select Lock Info. A pop-up window displays, giving you information about who locked the item, where the item was locked, and when the lock expires.

Viewing a Locked File
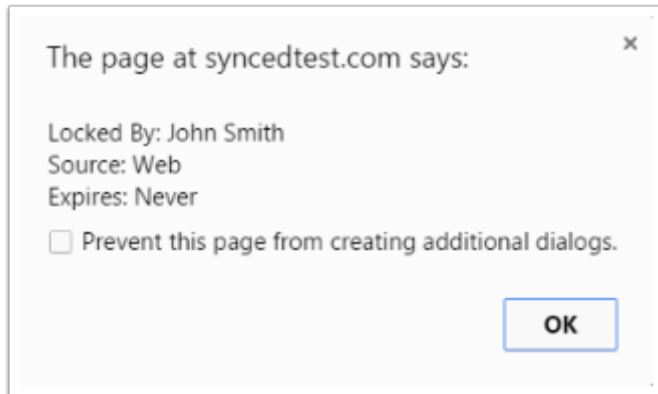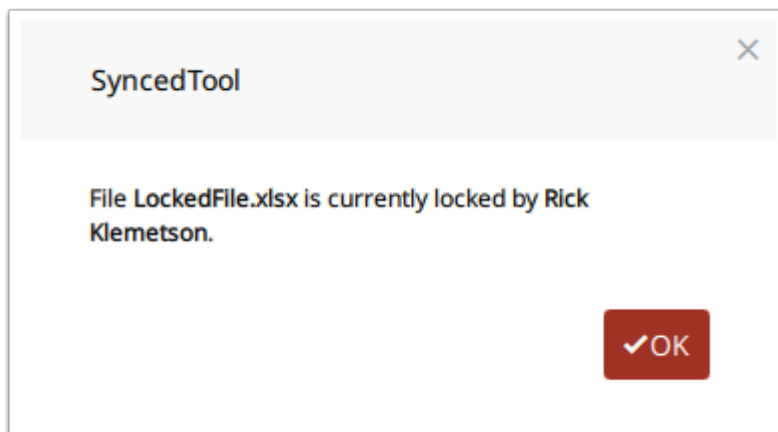
If a user opens an already-locked file, he or she will be presented with a pop-up notification.

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

If this user ignores the warning, and attempts to save changes, he or she will receive a warning message and be prompted to save the file with a different name.

Creating and Managing Backups

Overview

The Backups feature allows end users to create backups of folders that exist on their local machines. Alternatively, administrators can create backups for end users.

When administrators or end users create a backup of a folder, all new changes are continuously backed up. The backup can be accessed from the web portal, but it does not reside in the user's Synced Folder. When a user account is deleted from the system, the backup will deactivate, but will still be accessible in the *Backups* tab of the administrative web portal.

For more information on how end users create backups, please reference the [How Do End Users Back Up Folders from the Desktop Client](#) Knowledgebase article.

Use Cases

The Backups feature is designed to back up and restore important personal files, including Microsoft Office content, pictures, PDFs, and other files typically stored in a user directory or a home folder. This feature is especially useful for end users who do not have scheduled backups configured on their local machines.

In addition to being a quick and easy file-level backup solution for end users, the Backups feature can be used to restore content from one machine to another machine. For example, if a user's computer is corrupted or otherwise compromised, a desktop client can be installed and registered to the user on a new computer and the backup can be restored to this new location.

Similarly, the Backups feature can also be used to migrate a user's local content from an older computer to a new computer. First, the user can create a backup of the files and folders that need to be migrated. Next, the user can install and register a desktop client on the new computer. Finally, the backup can be restore to this new location.

For information on best practices related to the Backups feature, please reference the [Best Practices for Creating Backups in Anchor](#) Knowledgebase article.

Instructions

Creating a New Backup

You can create backups of folders within registered machines.

To create a backup:

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1. In the Organization navigation menu, select the organization in which you want to create backups. The selected organization displays.

2. Click the Backups tab. The Backups page displays, showing a list of all existing backups in the selected organization.

3. In the Backups page, click the New Backup button.
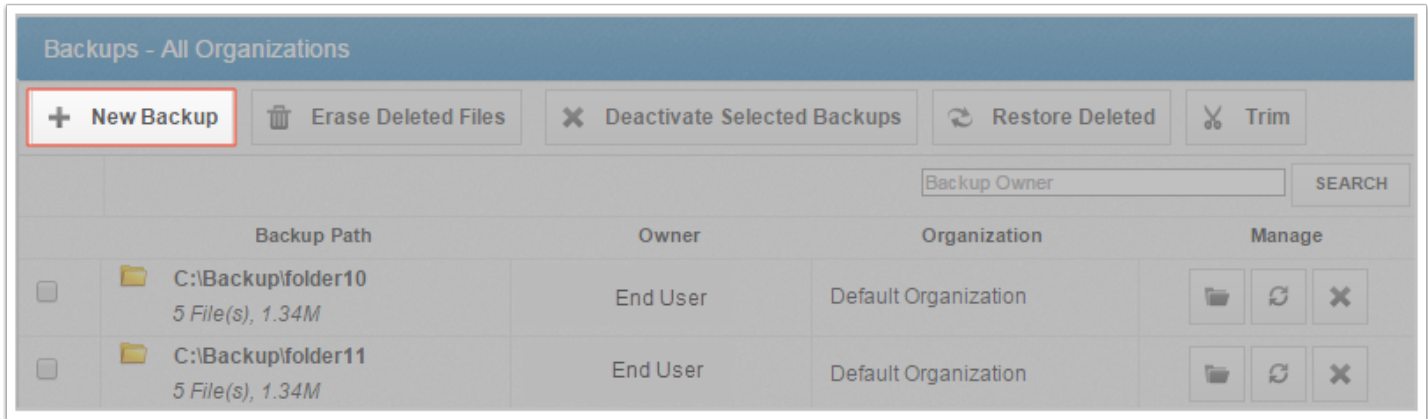
The *Backup Folders* page displays, listing all registered machines within the selected organization.
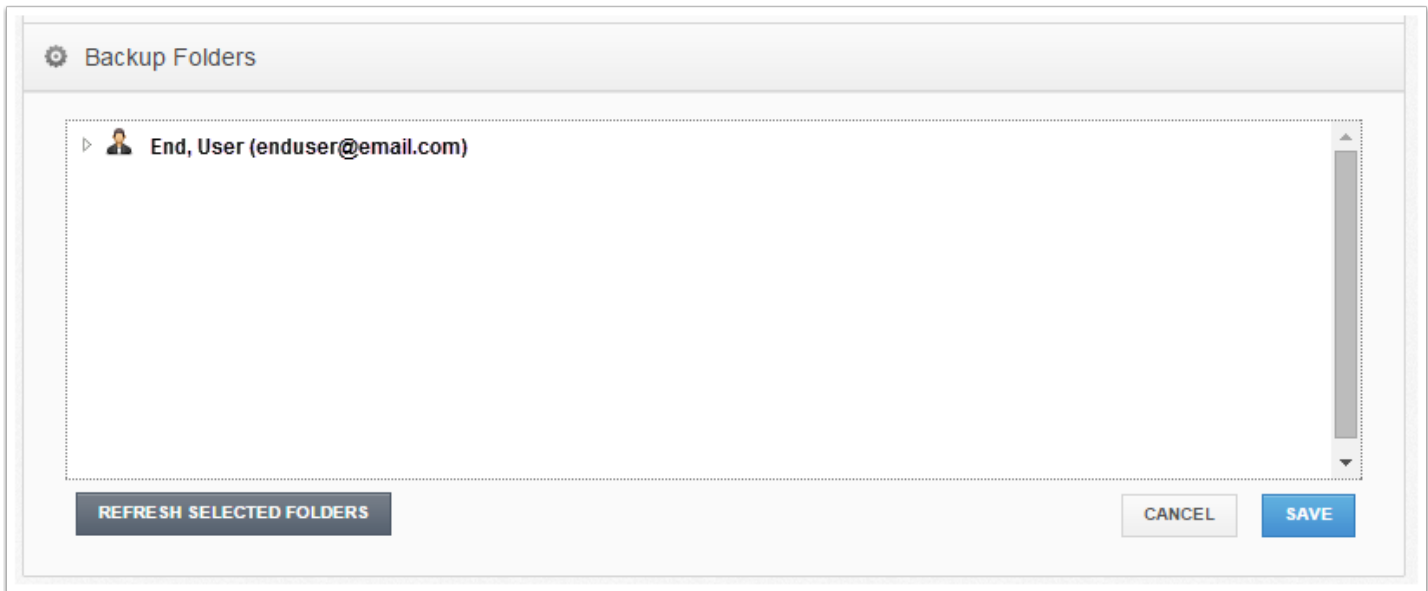
4. Click to expand a machine name, and select the specific folder that you want to back up.

5. After the selected item has been selected, click the Save button. The selected item is now backed up.

Managing Backups

You can manage all backups—whether they were created by you or end users—by clicking the **Backups** tab. In the *Backups* page, you can manage the content of backups, browse the content of backups, and delete backups.
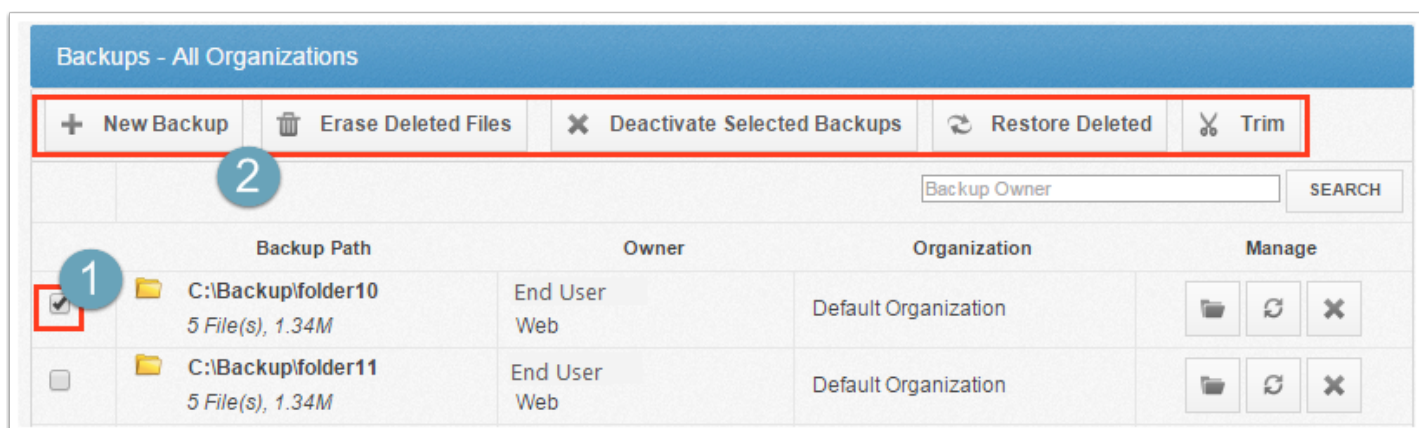
To manage backups:

1. In the Organization navigation menu, select the organization in which you want to manage backups. The selected organization displays.

2. Click the Backups tab. The Backups page displays, showing a list of all existing backups in the selected organization.

3. In the Backups page, find the backup that you want to manage.

Optionally, use the *Search* box to search for a backup using the owner's name. Please note that the search functionality is available in the administrative web portal only; end users cannot search for backups in their view of the *Backups* tab.

- Click the **checkbox** next to a backup. The toolbar will expand to display additional actions.

- Click the **Erase Deleted Files** button to permanently remove deleted files in the selected backup.
- Click the **Deactivate Selected Backups** button to remove the backup.
- Click the **Restore Deleted** button to restore the contents of the backup to a specified location.
- Click the **Trim** button to erase previous revisions to files in the backup.

4. While still in the Backups page, you can browse the contents of the backup.

5. Click the Browse button.
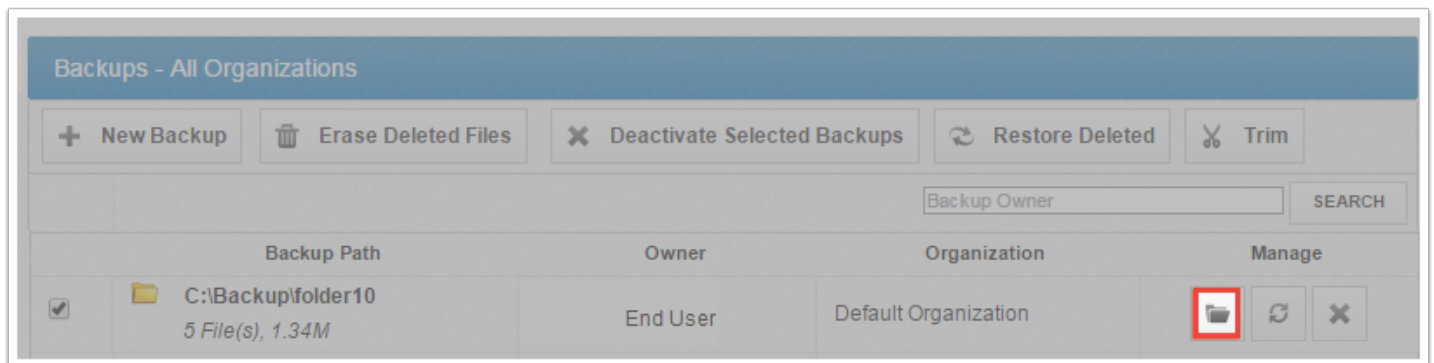
The backup opens, allowing you to browse its content.

6. Inside the backup, you can:

- Click the **Create Folder** button to create a new folder inside the backup.
- Click the **Upload Files** button to add files to the backup.
- Click the **Rollback** button to restore to a previous version of the backup.
- Click the **Show Deleted** button to show files that have been deleted within the backup
- Click the **Restore Deleted** button to return any deleted files to the backup.
- Click the **Trim** button to erase previous revisions to files in the backup.
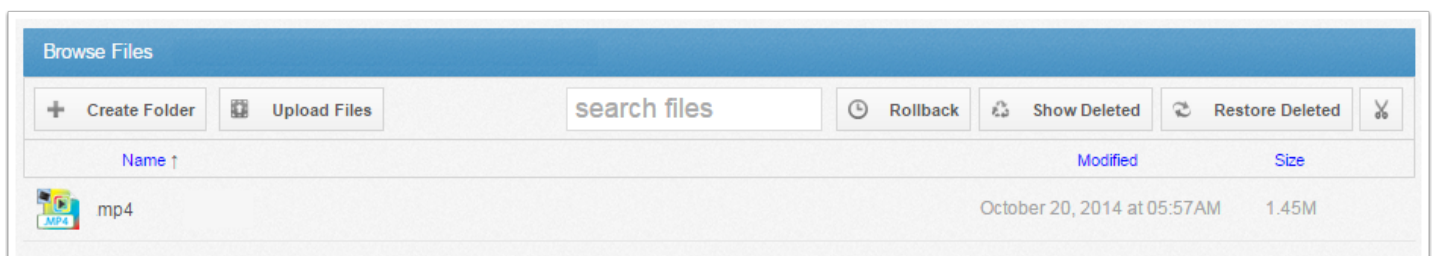
7. In the Backups page, you can restore a backup to a specific location. You can also restore a backup to a different machine, as long as a desktop client is installed on that machine.

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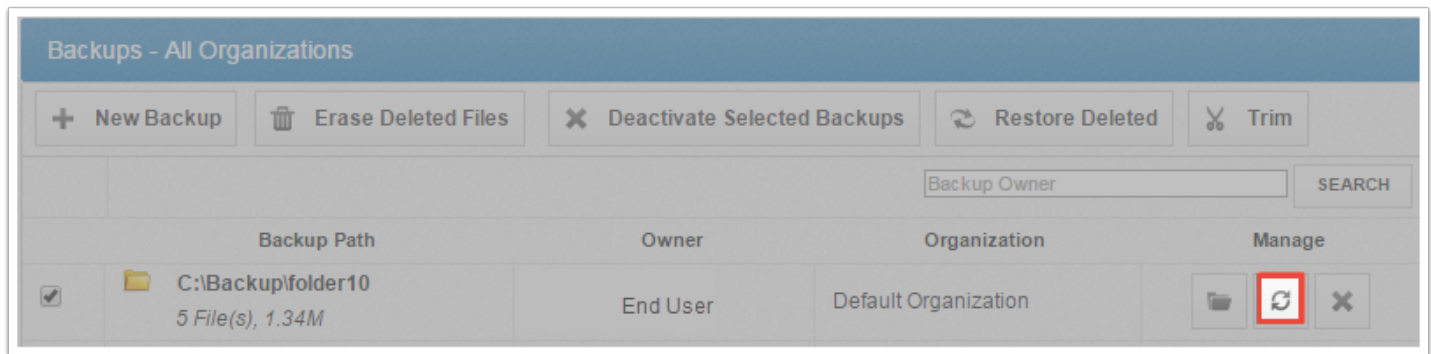
A *Restore Backup* page displays.
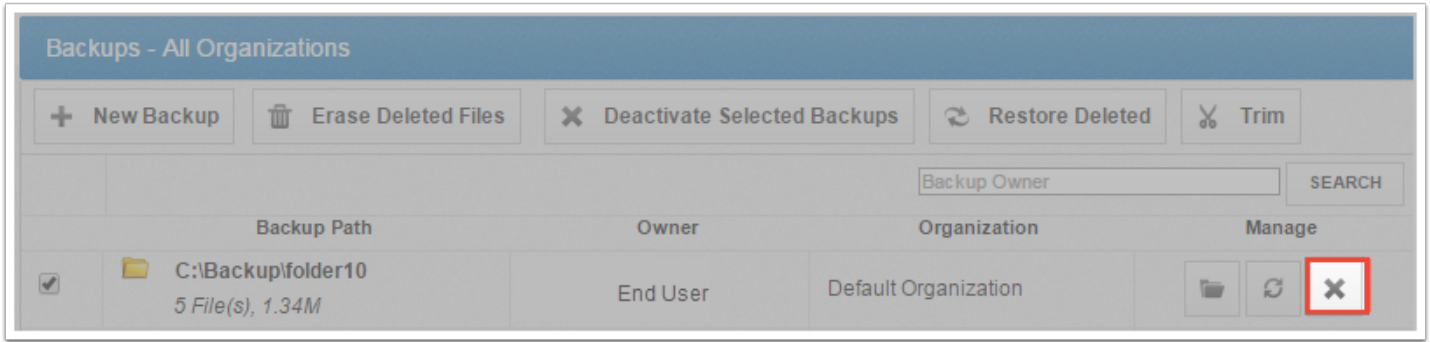
- In the *Restore Backup* page, browse the selected machine to select a restore point. Optionally, click the **New Folder** button to create a new folder as a restore point.
- Click the **Save** button when you are finished.

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

The backup will delete from the selected machine.

Protecting Data Using the Revision Rollback Feature

Overview

The Revision Rollback feature allows end users to restore all files within an entire folder (standard folder, Team Share, or Backup) to an earlier revision before a selected date.

The Revision Rollback feature is particularly useful for recovering from simple malware attacks, utilizing a file's revision history, and restoring all currently-existing content in the root to a healthy revision at a specified point in time. In these cases, you can use the Activity Log to determine when the infected revisions were uploaded, and then roll back files prior to the point of infection. Please note that a file's revision can refer to the originally uploaded file (first version) or a revision of an edited file (subsequent revisions).

> ❗ IMPORTANT: Advanced ransomware attacks—such as Locky—might delete, recreate, then change files names, thereby affecting a file's revision history, and preventing you from restoring to a previous revision using the Revision Rollback feature. In these instances, we recommend using the Snapshot feature to help you and your users recover from these advanced attacks. Using the Snapshot feature, you can restore data as it existed before infection. To learn about the Snapshot feature, please reference the [Recover from Advanced Malware Attacks Using The Snapshot Feature](#) Knowledgebase article.

More Ways to Protect Data

- To learn about the Snapshot feature, please reference the [Recover from Advanced Malware Attacks Using The Snapshot Feature](#) Knowledgebase article.
- To learn about viewing and restoring deleted files and folders in the web portal, please reference the [Viewing and Restoring Deleted Files and Folders](#) article.
- To learn how to restore individual revisions of files, please reference the [Viewing and Restoring a File Revision](#) article.

Instructions

Accessing the Revision Rollback feature:

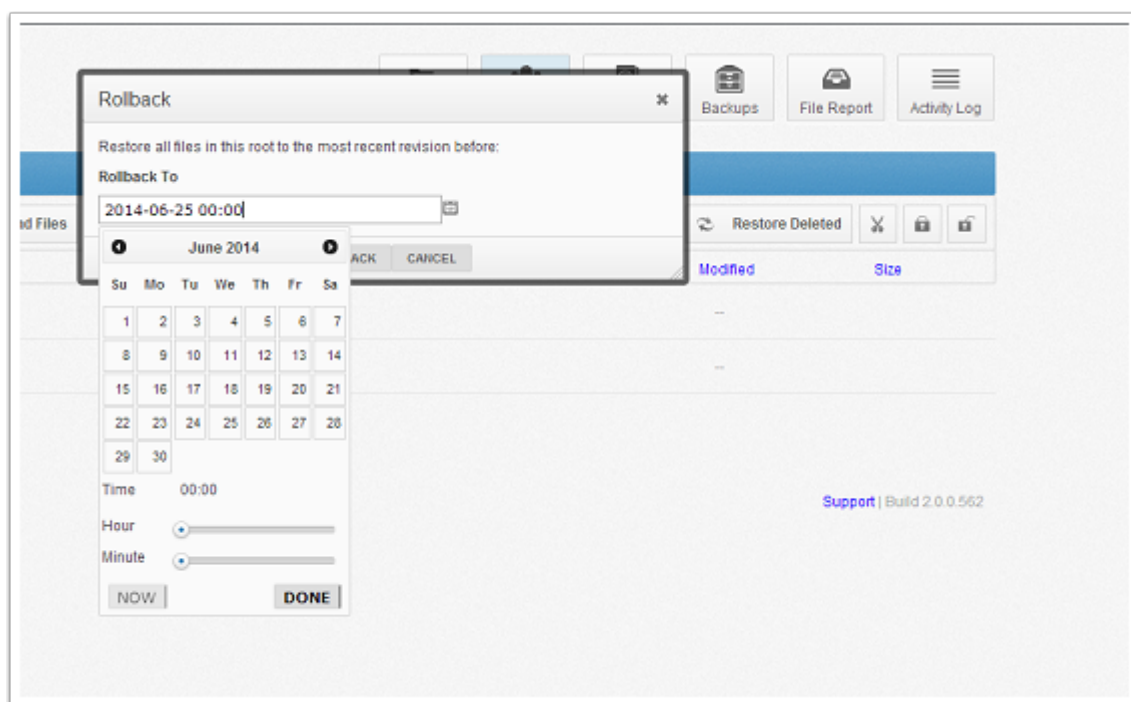### 1. Log in to the end user web portal and click the My Files link.

For information on logging in to the web portal, please reference the [Logging In](#) article.
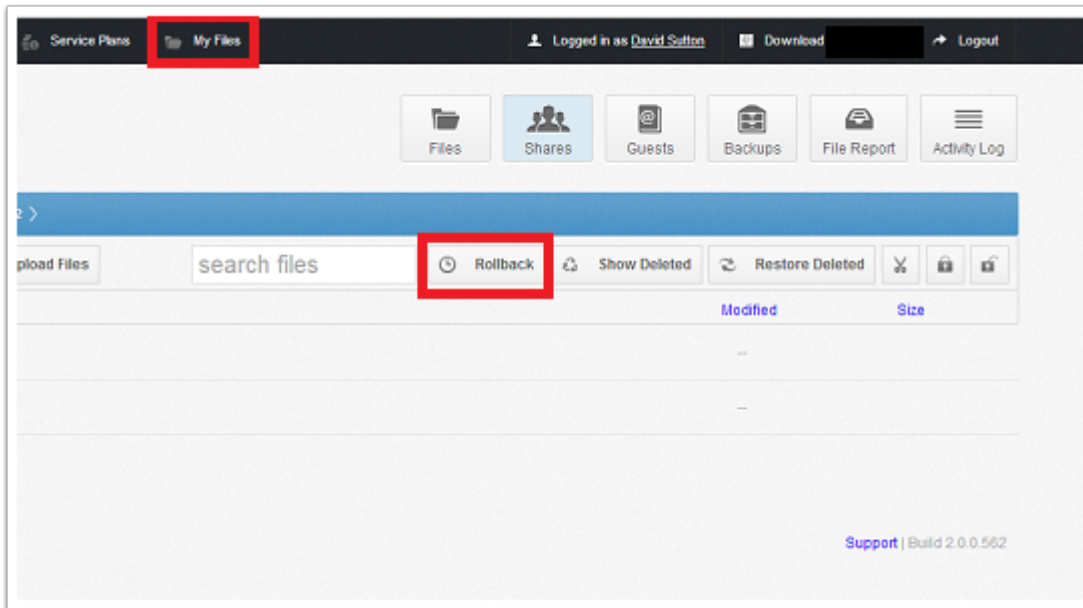
2. In the My Files page, navigate to the appropriate folder.

3. While inside the folder, click the Rollback button in the toolbar.

The *Rollback* pop-up window displays, prompting you to select a date and time. Select a day and time *before* the time to which you want to restore; you can optionally use the *Activity Log* to determine the most appropriate time. For example, if you select June 25th at 12:40 PM, the feature will find the first file version *before* June 25th at 12:40. If a revision exists at 12:40 and another at 12:39, the file at 12:39 will be restored.

> **ℹ** Note: The Revision Rollback feature utilizes a 24 hour clock, and is based off of the user account's timezone.

Rollback ✖

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

Rollback To

2014-06-25 00:00

	June 2014					
Su	Mo	Tu	We	Th	Fr	Sa
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					

Time   00:00

Hour

Minute

NOW   DONE

4. Click Rollback when you are finished.