ShareSync Get Started Guide for Windows

WHAT IS SHARESYNC?

ShareSync is a cloud backup and file sync and share service. ShareSync allows you to easily sync files between multiple computers, the ShareSync web portal and mobile devices so that you can access your files whenever and wherever you need them. With ShareSync, you are also able to securely share your files with your co-workers and external collaborators, like business partners or clients.

It's easy to get started with ShareSync. This document guides you through the steps to get started using ShareSync on your desktop, on your mobile devices and by using ShareSync Web.

Please visit our Get Started page to quickly get up to speed on Syncing and Sharing features of ShareSync by watching our training videos.

Contents

USING SHARESYNC ON YOUR DESKTOP

The ShareSync desktop client works on Windows 8, 7, Vista and XP, as well as Mac OS 10.7 and higher (Maverick, Lion and Mountain Lion).

You will need to install the ShareSync client on each machine that will be used to sync or share files from the desktop.

INSTALLING SHARESYNC

You can download the latest ShareSync client from the Downloads tab in the ShareSync Web App. The ShareSync client can also be downloaded by your administrator from the ShareSync tab in the Control Panel.

Once the client is downloaded, the installation wizard automatically runs and walks you through the installation process. During the installation, the client will prompt for the username and password for the ShareSync user, the preferred location of the My ShareSync folder and it will give you the option to select the folders which you would like to sync to your computer, assuming that you have already added some content to your account from another machine or web/mobile apps.

If a machine is already running a version of ShareSync, you should install the new version on top of the old one. In this case, do not uninstall the old version of the client.
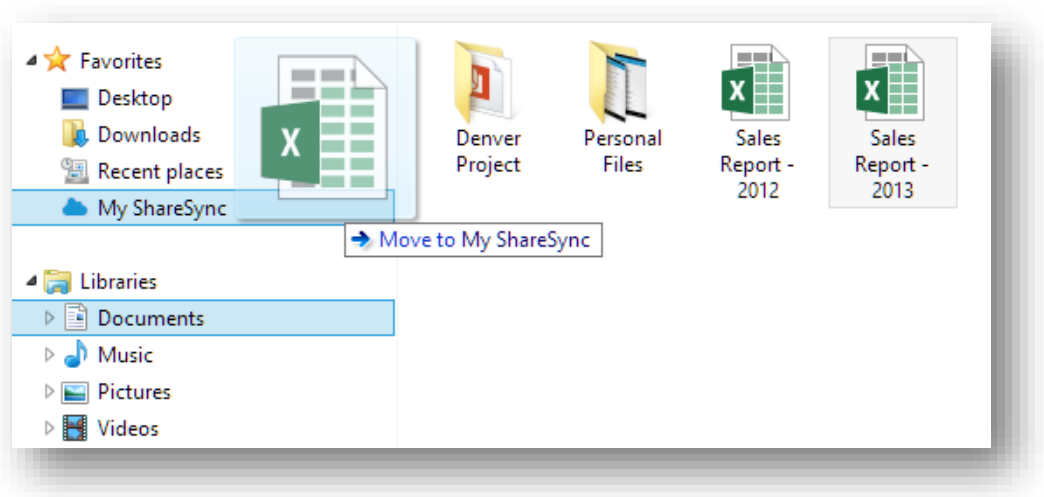
SHARESYNC FOLDER

Once ShareSync is installed on a computer, it creates a designated "sync" folder called *My ShareSync* adds it to Favorites in Windows Explorer. The default location of the My ShareSync folder is the root of your user profile: C:\Users\$username\My ShareSync. You can change this setting during the installation as well as after the installation of the client (from within the client Settings menu).

All files and folders added to the *My ShareSync* folder are automatically backed up and synced to the cloud as well as all the user's devices where ShareSync is installed.
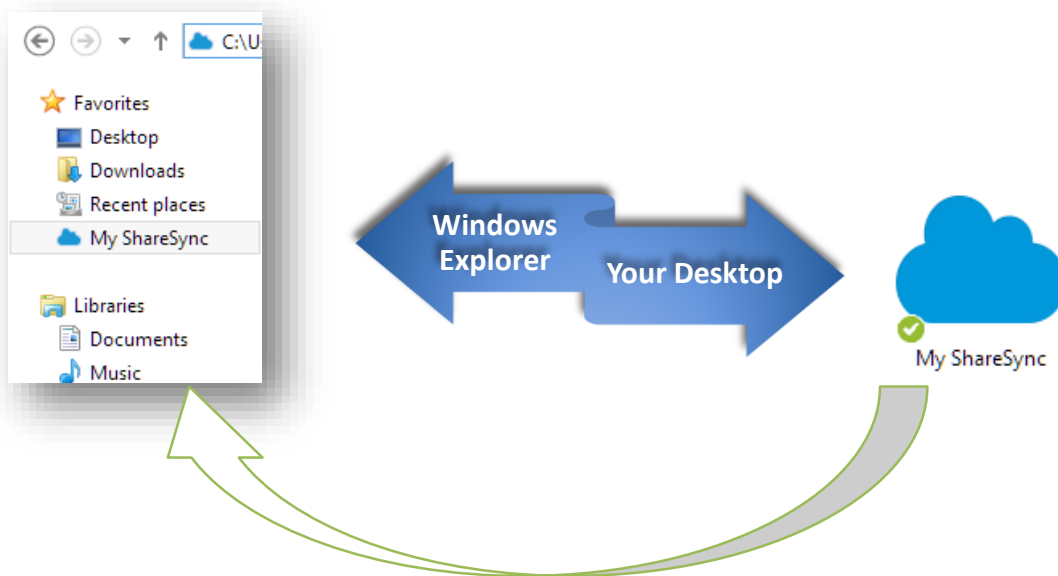
Files and Folders can be moved to the My ShareSync folder using standard file/folder operations: copy/cut and paste or drag-and-drop.

Note: You can save files directly into your My ShareSync folder (and in turn, have them synced to the cloud and your other devices) by choosing ShareSync in the Favorites section of the *Save As* dialog.
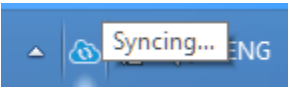
SHARESYNC IN THE SYSTEM TRAY

Once ShareSync is launched, it will run in the system tray. ShareSync icon states indicate current ShareSync status. Double-clicking on the ShareSync system tray icon will open the sync folder and give you a quick access to your "Synced" files. ShareSync Microsoft Office and Outlook plugins are enabled in the "Settings" window accessed by right-clicking the system tray icon.
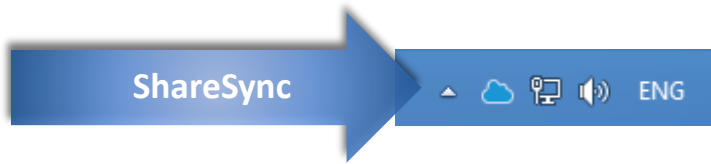
The following icons may appear depending on application status:

Syncing	Files up to date	Paused	Offline

Example:

The system tray icon provides a *right-click menu* which allows users to perform the following actions:

- **Download/Upload progress** – shows upload and download details for files during sync.
- **Open sync folder** – opens My ShareSync folder on this computer
- **Launch ShareSync Web** – opens the ShareSync web app
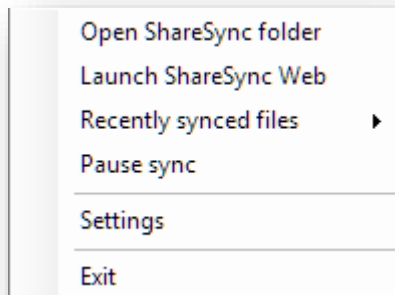
- **Recently synced** - 10 most recent files are shown
  - Green arrow ➜ shows files that you have recently modified on this computer
  - Blue arrow ← shows files that have recently been modified on your other devices, or by other users collaborating on shared content
  - Grey text and arrow ➜ document 4.docx shows files that have been moved or deleted or are no longer available
- **Pause/Resume Sync** – Backup synchronization is paused/resumed
- **Settings** – access to ShareSync settings, feedback and help
- **Exit** – Closes ShareSync application

SHARESYNC SETTINGS

In ShareSync settings window users can to the following:

- Enable/disable ShareSync Office plugin
- Enable/disable ShareSync Outlook plugin
- Change location of My ShareSync folder
- Choose folders you want to sync to this PC using Selective Sync
- Unlink ShareSync folder from your account
- Create & send diagnostic report

SELECTIVE SYNC

- Selective Sync allows you to select the folders that you want to keep backed up and synced on your computer. This allows you to sync a working set of files on your work and home PCs, and access your other ("Archived") content via Web and Mobile apps. This feature is especially handy if you have disk space limitations on your PC.
  - o Hint: Keyword Search will allow you to quickly find the files you are looking for in Web and Mobile apps
- Selective sync works at the sub-folder level, allowing for granular configuration of sync preferences.
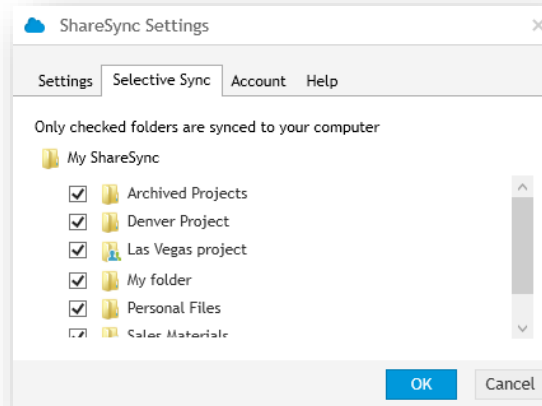
MANAGING SHARING PERMISSIONS IN THE SHARESYNC DESKTOP FOLDER

When exploring ShareSync files from the My ShareSync folder, there are several right-click options available, depending on the permission settings for the folder:

- Permission Level (available for all files and folders)
- Browse in ShareSync Web (only available for folders)
- Manage Sharing (only available for folders you own)
- Send Link (only available for folders you own)
- Show previous versions (only available for files)

Each option takes the users to the ShareSync Web App to complete the action. In the example below, the folder "Tampa Project" is owned by the user. By right-clicking on the folder in their ShareSync folder, they can choose whether to browse in ShareSync Web, Manage sharing, or Send a link.
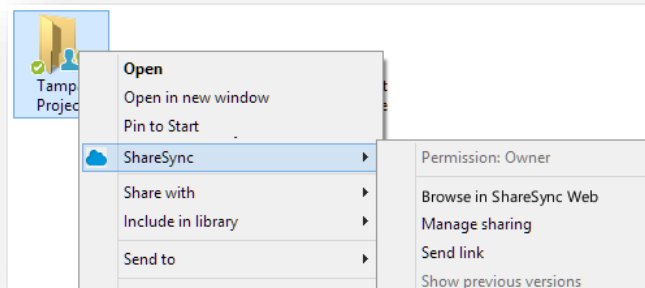
CONTEXTUAL ICONS: DETERMINING FILE SYNC STATUS & LOCATING SHARED FOLDERS

Contextual icons help you easily determine the sync or share status of files or folders in your ShareSync desktop folder.

**SYNC** status icons show the user whether a file or a folder in their My ShareSync folder is up to date:

Folder/File content is up to date. (e.g. all updates to files made by collaborators have been synchronized to the desktop)

Folder/File content is currently being backed up and synchronized. (e.g. updates to files made by collaborators are synchronized to the desktop)
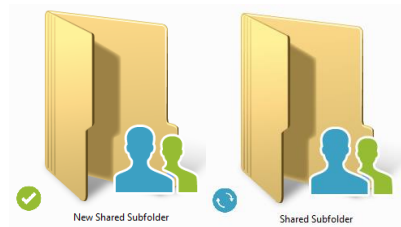
SHARE status icons show the user whether a folder is private or shared as well as the type of access permission the user has.

Folder is shared with other collaborators and user either owns the folder or has 'modify' permissions (e.g. user can view, edit, move, delete files)
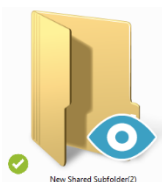
Folder is shared by another collaborator and user has 'view'-only permissions (e.g. user can view, but CANNOT edit, move, delete files)

Folder is private (i.e. NOT shared) and owned by the user. (e.g. user has full 'owner' permissions on the folder)

SHARESYNC WEB

ShareSync web allows you to securely access your ShareSync files and folders from any computer with a web browser.

Directly from the ShareSync web, you can:

- Access files and folders
- Search by keyword matching the file/folder name or file content
- Upload files
- Manage files and folders
- Restore files
- Share files and folders
- View your activity feed
- Download desktop client and mobile apps

There are several ways to navigate to the ShareSync Web App:

1. Right-click on the ShareSync icon in the system tray and choose "Launch ShareSync Web." You will be automatically signed with your ShareSync credentials:
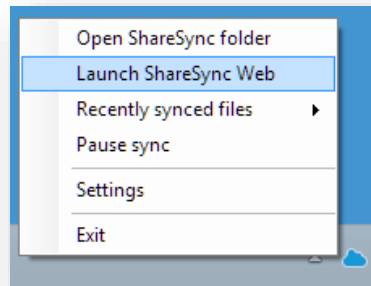
2. From the ShareSync login page

The following functionality is available through ShareSync Web:
1. Files & Folders: Search across all files and folders
2. Files & Folders: Share your files and folders
3. Files & Folders: Upload files to ShareSync
   a. Uploaded files will be backed up and remain synced to all your computers and mobile devices that have ShareSync installed
4. Files & Folders: Download files
5. Files & Folders: Create/Delete folders
6. Files & Folders: Delete files
7. Files & Folders: Restore your deleted files and folders
8. Files & Folders: View Version History
9. Files & Folders: Lock files for exclusive editing rights
10. Activity: View recent activity on your private and shared files and folders
11. Outlook Attachments: Access links that have been shared using the ShareSync Outlook Plugin
12. Downloads: Download ShareSync desktop client and other ShareSync Apps
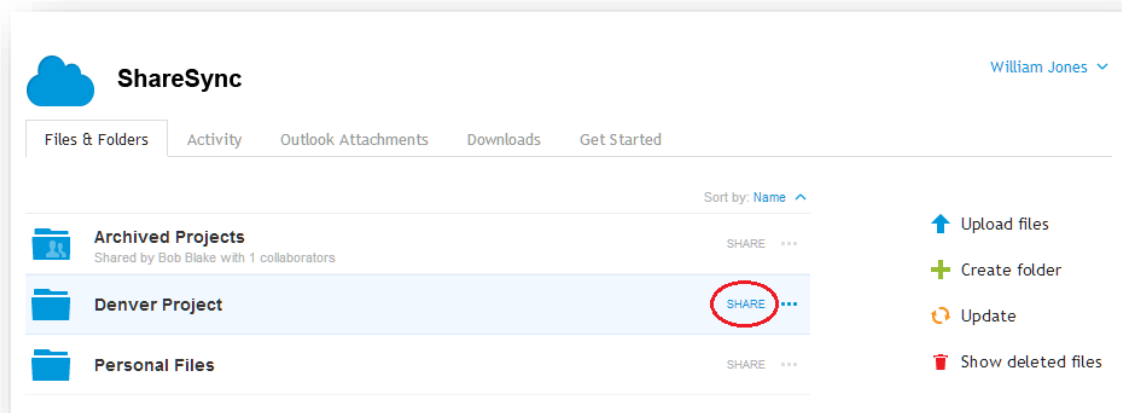13. Get Started: Quick access to ShareSync documentation and FAQ.

SHARING FILES AND FOLDERS WITH SHARESYNC

ShareSync makes it easy to securely share files and folders with co-workers and external collaborators.

## SHARE WITH CO-WORKERS & EXTERNAL COLLABORATORS

From ShareSync Web:

1. Select "Share" next to folder that you'd like to share

2. Select users or groups that you'd like to share folder with. Type in the person's name in the dialog box. As you start typing, suggestions will be provided for internal collaborators and groups. If you are trying to share with an external collaborator, you will need to type in or past the full email address of this user.

   a. Group sharing will be available if your Administrator has configured Exchange Distribution Lists within the company's Control Panel account. They will allow you to share a folder with a group of users. If they are not available on your account, please contact your Administrator.

   b. Depending on the Sharing Policy configured by your Administrator, you may be able to share with external collaborators with or without Administrator approval. If the policy requires each external share to be approved, your invitation will only be sent to the external collaborator once the Administrator has approved it. If there are delays in establish the collaborative share, please contact your Administrator
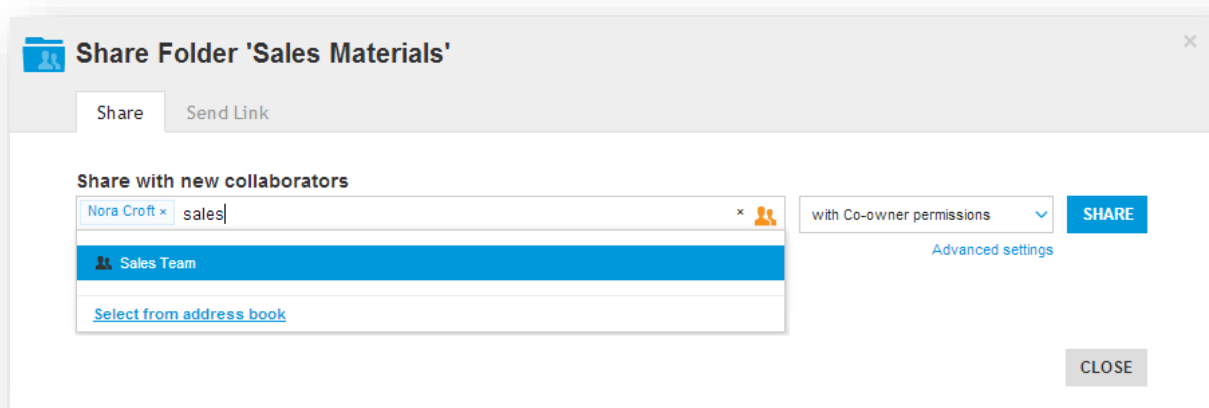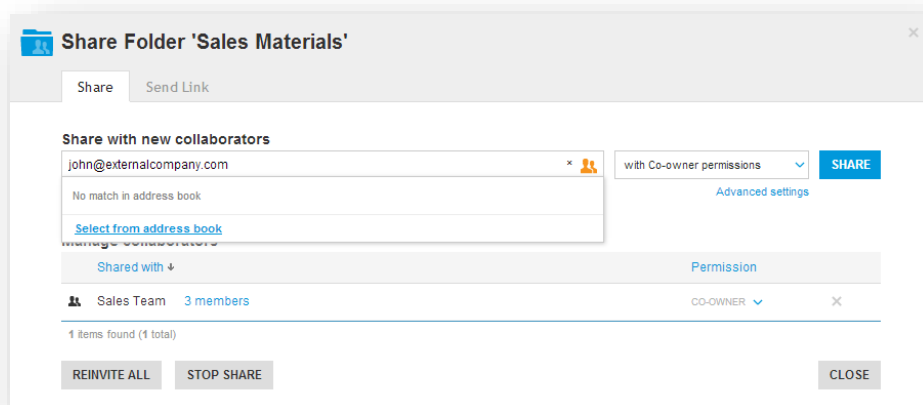
Sharing with Internal Collaborators and Groups
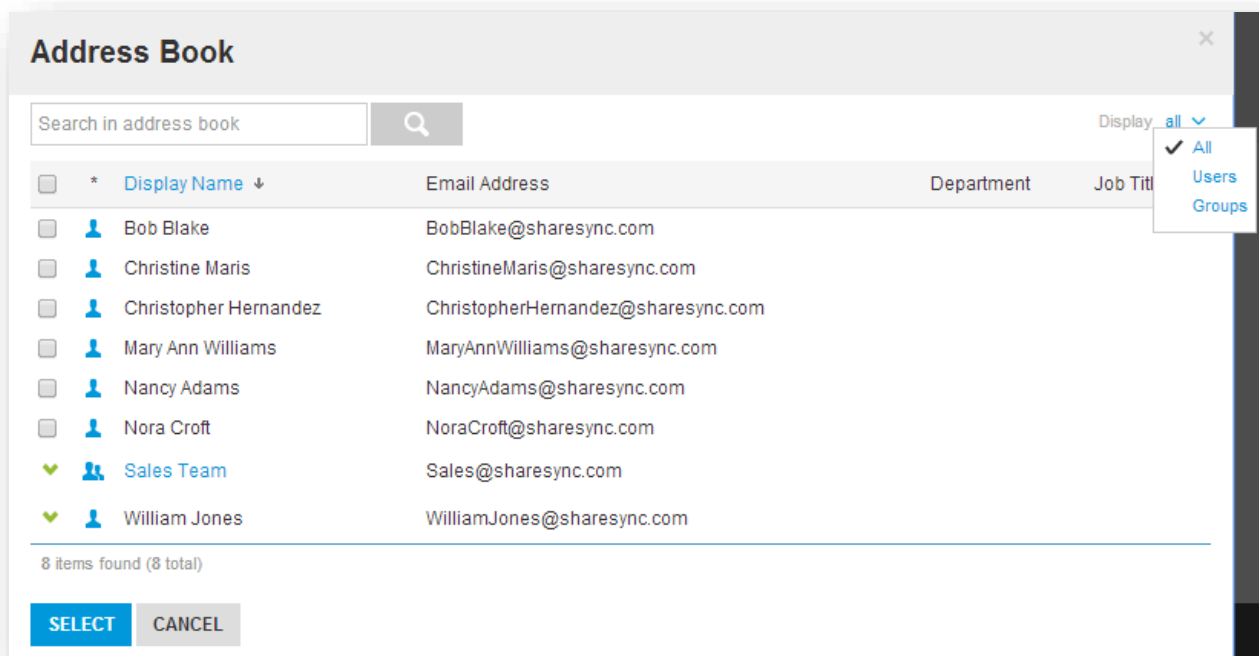
Click on the Address Book icon to view all Internal Collaborators and Groups
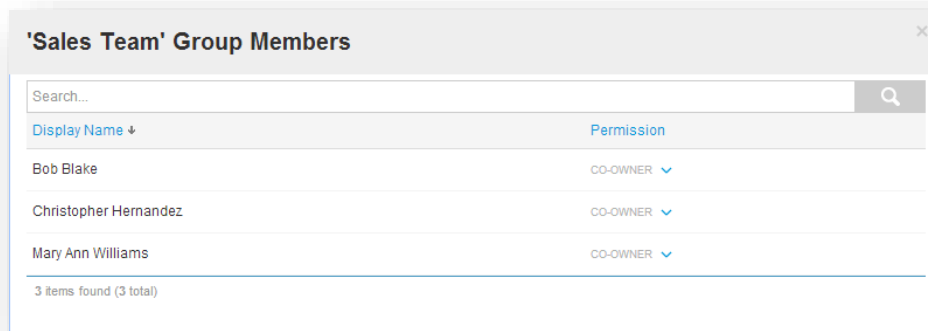
Click on Group name to view members

Sharing with External Collaborators

3. Select Permissions: View, Modify or Co-Owner:

   - "View" permission allows collaborators to ONLY view content in shared folders; any changes made to documents will not be synchronized to other collaborators' folders
   - "Modify" permission allows collaborators to view, modify and delete content in shared folders; changes made by other collaborators will be synchronized to your "My ShareSync" folder
   - "Co-owner" permission allows collaborators to re-share folders with access permissions, share files/folders as web links, and permanently delete files, in addition to all the features provided by the "Modify" permission.

   NOTE: As a security measure, External Collaborators can only be assigned View or Modify permissions. They cannot re-share the content you've shared with them.

The following table summarizes the actions allows by each permission setting:

	Co-owner permissions	Modify permissions	View permissions
Download	✓	✓	✓
Add	✓	✓	
Edit	✓	✓	
Delete	✓	✓	
Restore	✓	✓	
Permanently delete	✓		
Re-share	✓		
Send link	✓		

4. For each folder, you can view the status of your sharing request, resend an invitation, stop sharing, or change sharing permissions.
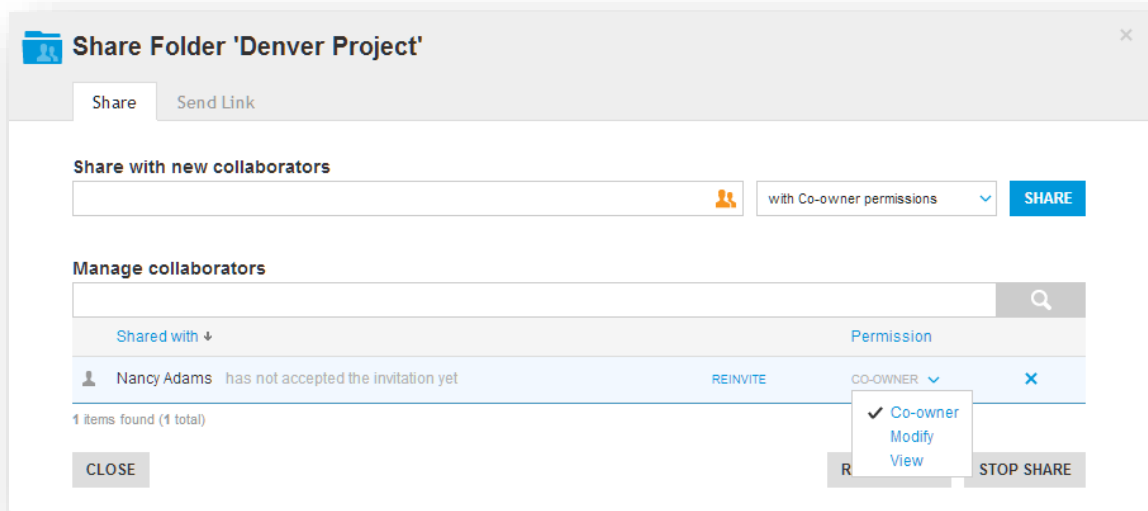

Once they have been given sharing permissions for a particular folder, invitees will receive an email notification. The notification contains a link that launches ShareSync Web where they can accept the invitation. Invitees must accept the invitation before they can access content in the shared folder. Once an invitation is accepted, all shared content will be synchronized to devices running ShareSync.

SHARESYNC SUB-FOLDER SHARING:

ShareSync allows you to share any folder with your collaborators

- When you share a folder, any sub-folder under that folder will also be shared.
- All collaborators will inherit the same permissions as the parent folder.
- New collaborators can be added to the sub-folder in addition any collaborators inherited from the parent folder. **However, any collaborators inherited from a parent folder cannot be removed.**

You can also select "Share" in the context Menu of any top-level folder (that you own) inside the "My ShareSync" folder; this action will redirect you to ShareSync Web App and allow you to configure sharing options.
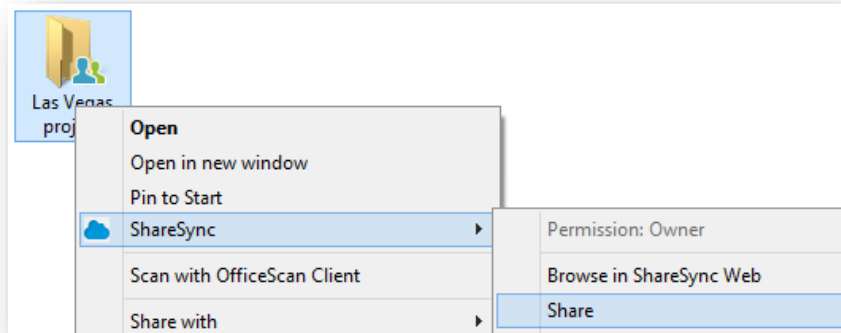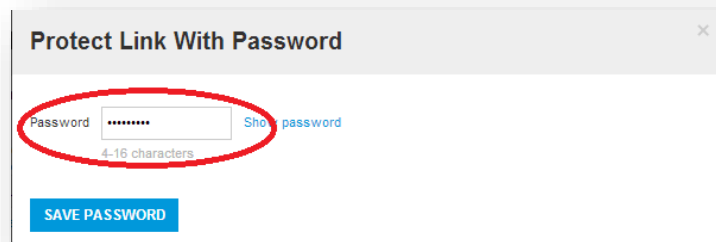

SEND LINK

Send link functionality provides the following features:

- Quickly and securely share large files or folders with anyone (e.g. share documents which are too large to share via email)
- Make content available in download-only mode
- Use our integrated "email link" functionality to send link or just copy/paste links into IM, email, and SMS clients
- Share files with users outside of your organization, who do not have ShareSync installed. (i.e. Recipients do not need to download/install the client as files are made available to them via the Web Interface)
- Disable an existing web link share

From ShareSync Web, select a file or folder, click "Share" and then choose the "Send Link" tab:
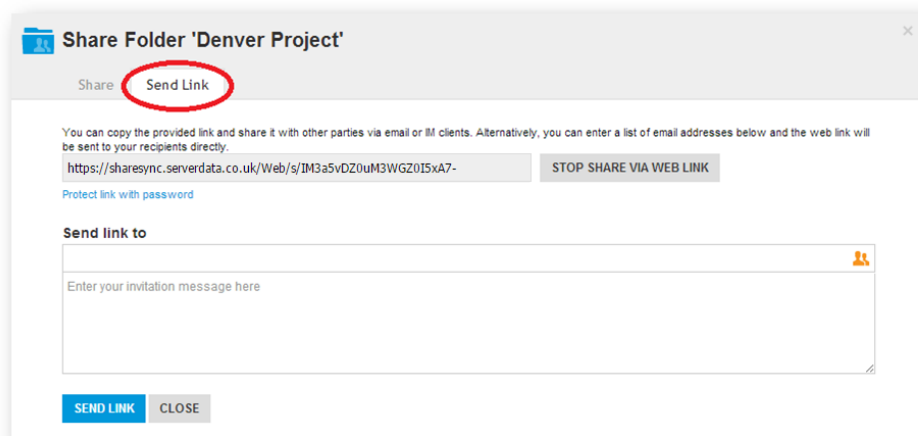
You can copy and paste the link and send it separately or email it directly from ShareSync using this dialog box. If you wish to send from ShareSync, enter the email address(es) to which to send the link. You can also include an optional message. You can choose to password-protect the link before sending it. If a link is password-protected, the recipient will be asked to enter a password before being able to view and download the content. The password will not be sent along with the link, so if you password-protect a link, make sure you provide the password separately.

You can also share a file or folder as a link directly from Windows Explorer. Right-click the file/folder and choose "Send Link" from the ShareSync menu. You will be redirected to ShareSync Web where you can generate and send the link.
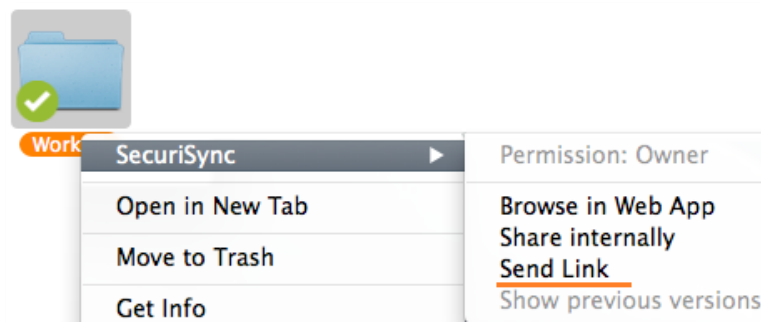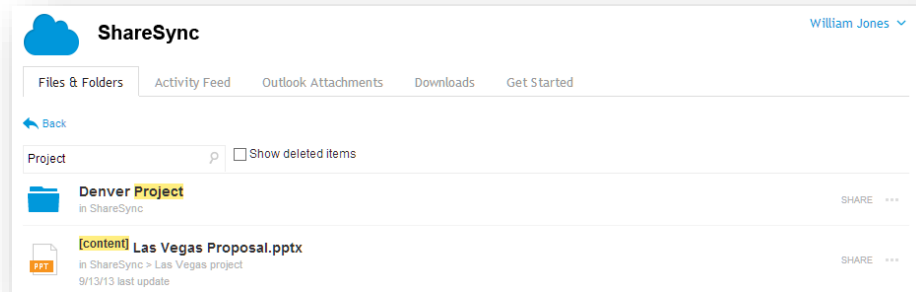
FULL TEXT SEARCH

Search functionality in ShareSync allows the users to search for words and phrases in both file and folder titles and file content.

Terms

There are two types of terms: Single Terms and Phrases.

A Single Term is a single word such as **test** or **hello**. A Phrase is a group of words surrounded by double quotes such as "hello world".

Wildcards

- For a single character wildcard search use the **?** symbol. The single character wildcard search looks for terms that match that with the single character replaced.
- For a multiple character wildcard search use the ***** symbol. Multiple character wildcard searches looks for any matched characters. Example: "*.ppt" search for all PowerPoint files

For a file name only search use **name:** in front of the term. Documents containing the term only in the content will not be displayed. For a content only search use **content:** in front of the term. Boolean operators (AND, OR) allow terms to be combined through logic operators. Example: Name: "(*.ppt) AND Content: (Budget)" searches for all PowerPoint files with word "Budget" in content.
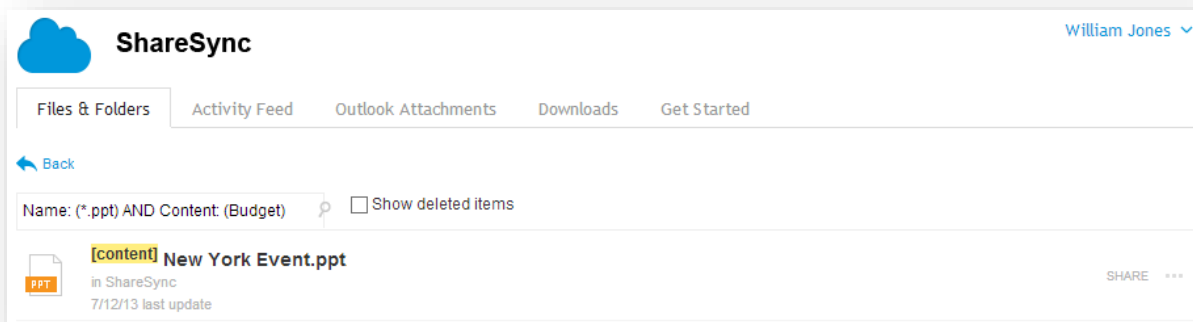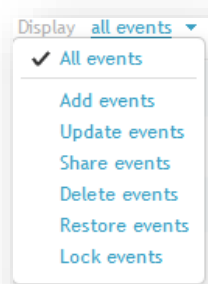

- Learn more about search functionality in [KB article](#)

ACTIVITY FEED

The Activity Feed shows all the recent activity for either a private or shared folder.
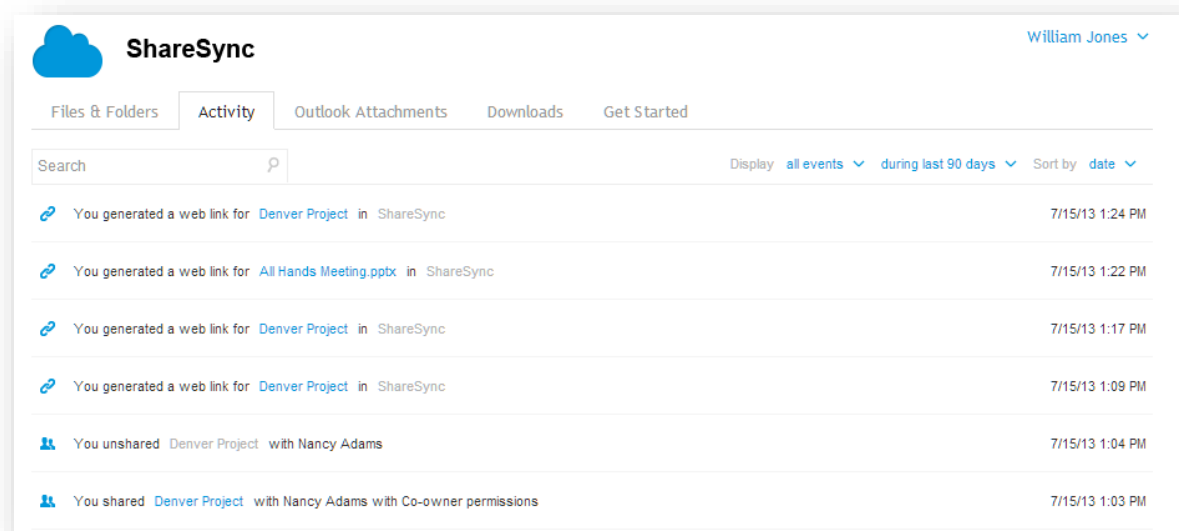
Events can be filtered by Event type and date range.

You can search by file name, folder name, or collaborator name.

FILE MANAGEMENT

ShareSync offers several features to manage files.

SHARESYNC RECYCLE BIN – 'SHOW DELETED FILES'

Deleted files and folders can be restored in ShareSync Web. To access deleted files, select the "Show deleted files" link at the top-right of Files & Folders list. This option will display deleted files and folders in your list with a distinctive grayed-out icon. When deleted files are displayed, the "Actions" menu becomes active.

- Restore – this option un-deletes the file and restores it to the ShareSync folder
- Permanently Delete – this option permanently deletes a file or folder. **Once a file or folder has been permanently deleted, it cannot be restored.** Only the file or folder owner can restore or permanently delete.
- IMPORTANT:
  - If you administrator has enabled the policy which prevents Permanent Deletions at the end-users level, 'Permanently Delete' option will NOT be available to you.
  - If you administrator has enabled the Recycle bin retention policy, some deleted files in your ShareSync Recycle Bin may be automatically purged.
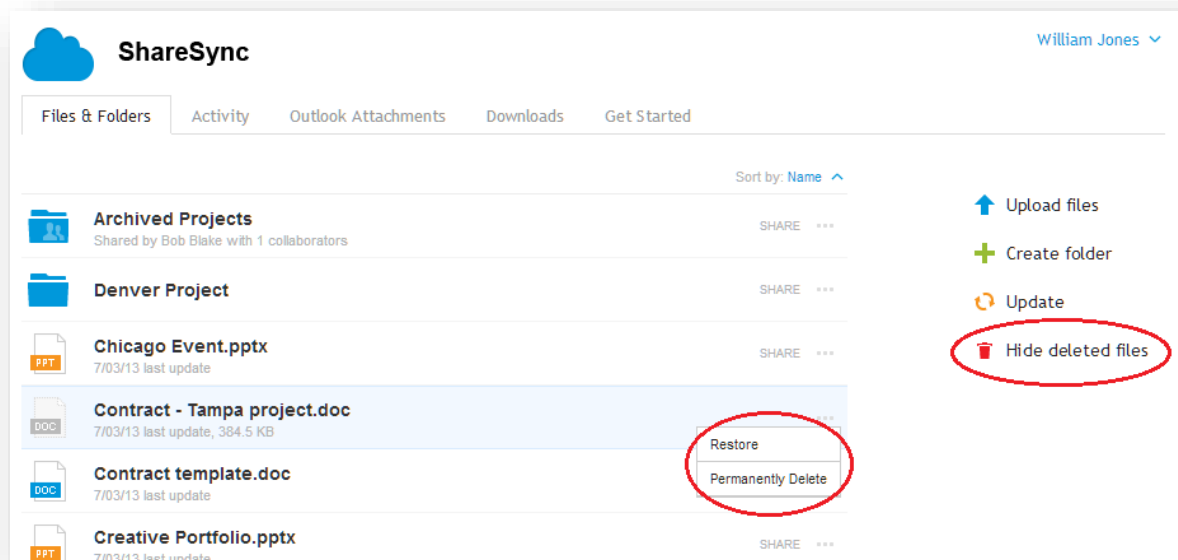
VERSIONING

In the Files & Folders list, you can access all past versions of a particular file. Versioning provides the full history of changes to a file. It allows a user to trace back to an older state of a file by opening a past version. It also allows one to restore a past version to the current/latest version of a file.

To access a preview version of a file, select the Versions option from the Actions menu of that file in your Files & Folders list from the ShareSync Web App.
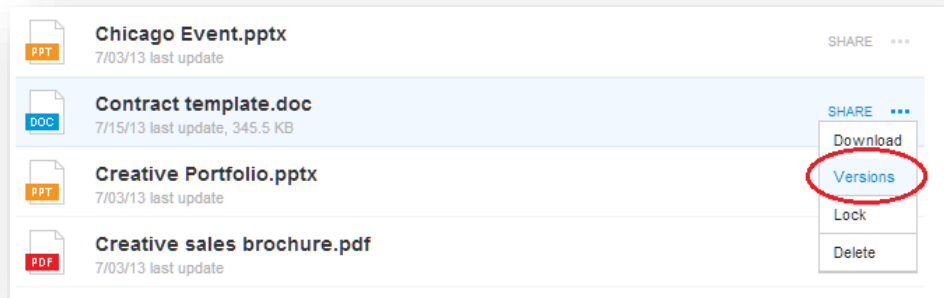
You will see a list of all versions that have been saved of the file, the collaborator, and the date and time stamp. You can restore or download any of the previous versions on this list.

- Restore – this option replaces the most current version with the version you are restoring.
- Download – this option allows you to download and view a file without making changes to the current version.


FILE LOCKING

ShareSync allows collaborators to lock a file prevent other collaborators from making changes to the file. Once a file is locked only the collaborator who locked it can make changes to the file. To lock a file, select Lock from the Actions mention of the file in ShareSync Web.
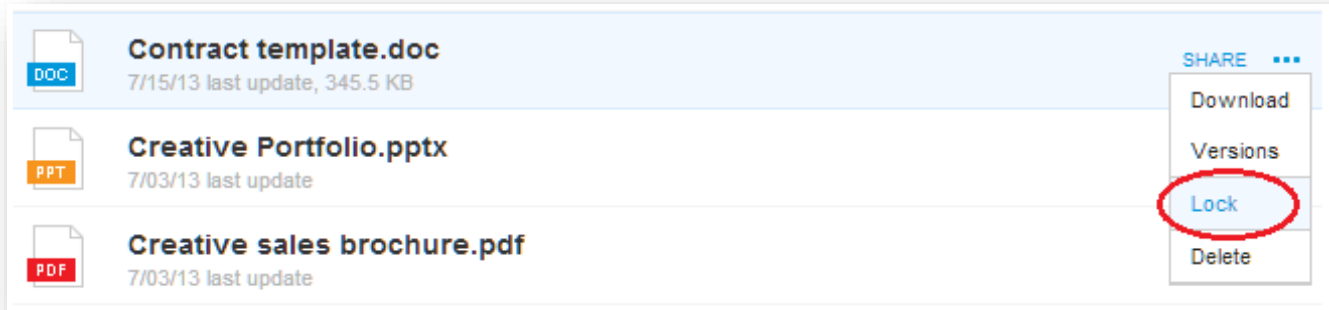
You can also lock a file from Windows Explorer in your ShareSync folder. Right-click on the file you wish to lock and choose Lock from the ShareSync options list. Once a file is locked, a padlock icon will appear next to it in the Files & Folders list.
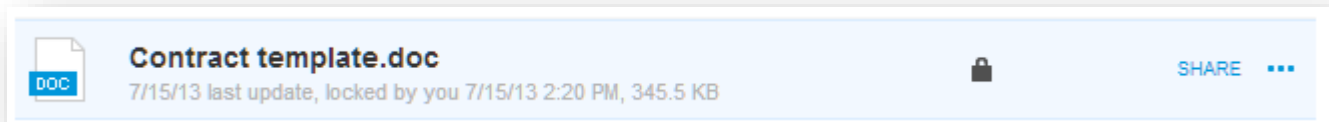
Files can be unlocked from either ShareSync Web or the desktop in the same way they were locked. Collaborators can also request to unlock a file so they can make changes to rile by submitting a request through the web app.
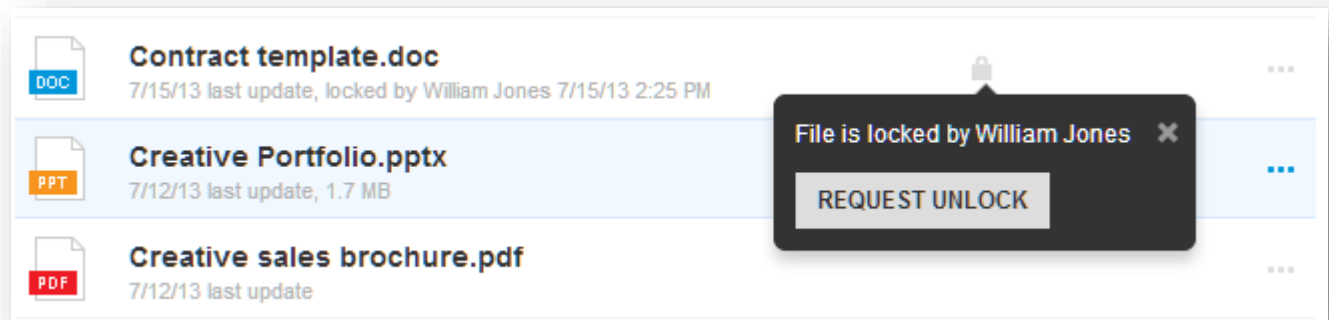
MOBILE SHARESYNC

You can use ShareSync on your mobile phone to be able to view, manage, and share files from your iPhone, iPad, Android or BlackBerry.

ShareSync is currently available for the following mobile platforms:

- Android phones and tablets (Android 2.1 & higher)
- iPhone, iPod, iPad (iOS 6.0 & higher)
- Blackberry (Blackberry 10)
- Windows 8 Mobile

You can download the mobile applications from their respective app stores: Google Play, Amazon Appstore for Android, Blackberry AppWorld and iTunes. Links are provided in ShareSync Web.

Mobile applications provide the following features:

- View/Delete files and folders inside "My ShareSync" folder
- Upload photos and videos on iOS & Blackberry devices and upload any files on Android devices
- Add files to Favorites and access "Favorite" files while offline
- Share your files and folders via web-link
- Passcode lock
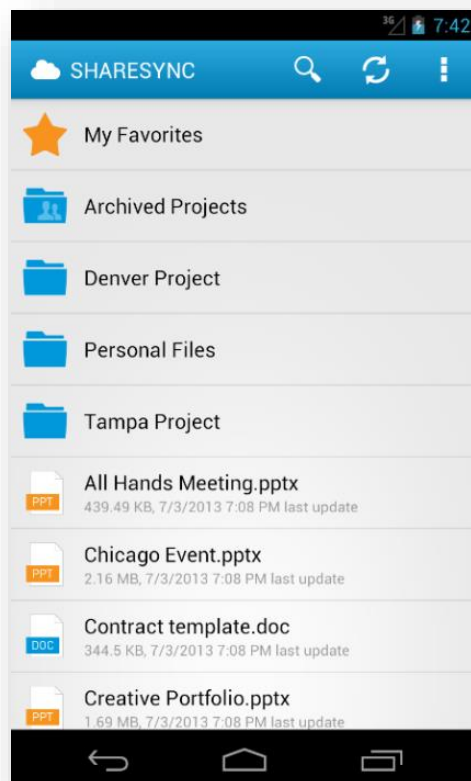- iOS app also provide the ability to print files
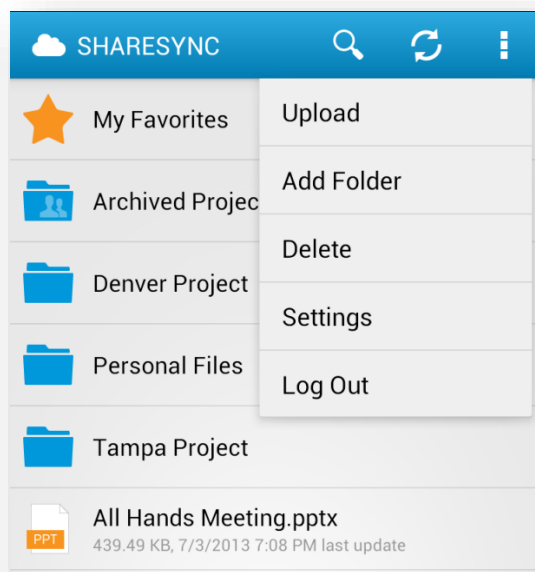
ShareSync for iPhone
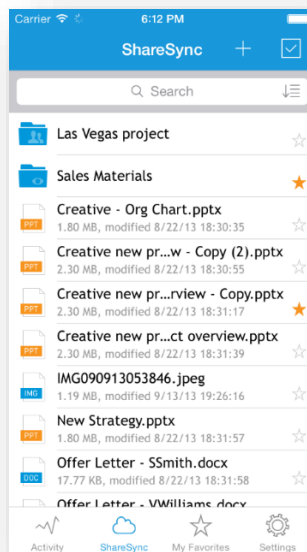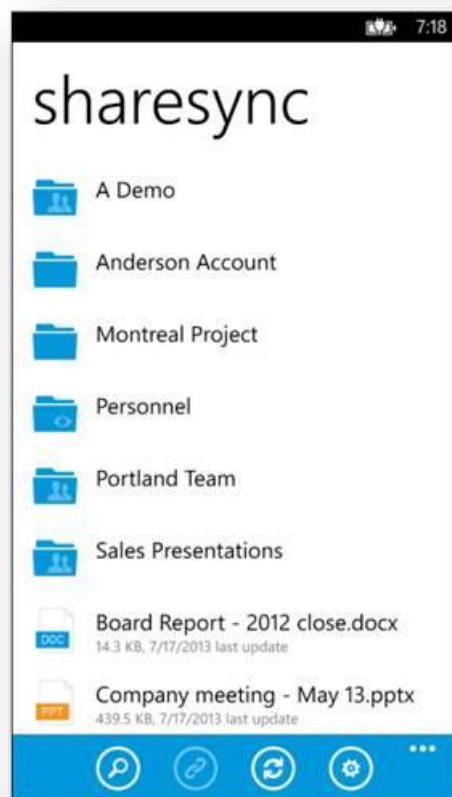
ShareSync for iPad
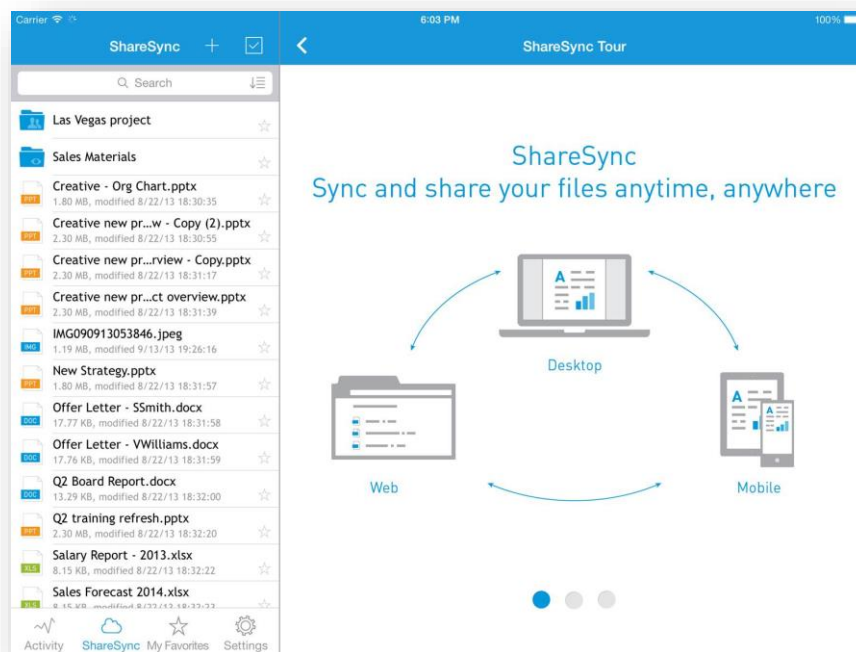
ShareSync for Android

ShareSync for BlackBerry

ShareSync for Windows 8 Mobile
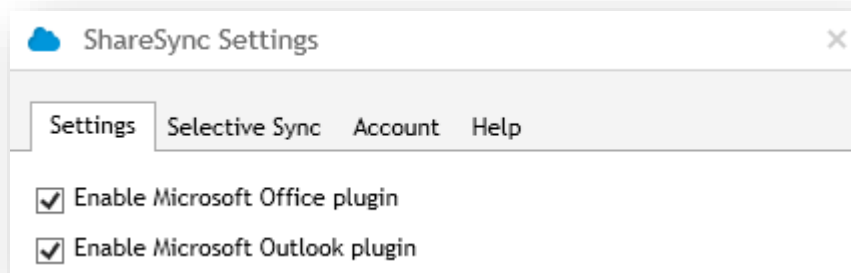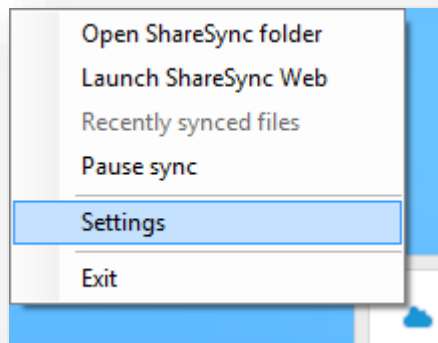
OFFICE AND OUTLOOK PLUGINS

Microsoft Office and Microsoft Outlook plugins allow you to manage files and folders directly from within these applications.

The plugins work with the following versions of Office and Outlook:
- Microsoft Office 2007, 2010 and 2013
- Microsoft Outlook 2007, 2010, and 2013

CONFIGURING PLUGINS

The Outlook and Office plugins are enabled by default part of the desktop client installation. Plugin settings can be configured within the ShareSync Settings menu in tray context menu.

Outlook and Office will need to be restarted for the plugins to be activated. The desktop client needs to be running in order to the plugins to operate correctly.

MICROSOFT OFFICE PLUGIN

The Microsoft Office plugin provides an easy way to save files to ShareSync and manage sharing. To save a new Office file to ShareSync, choose the "Save to ShareSync" option from the Office ribbon.
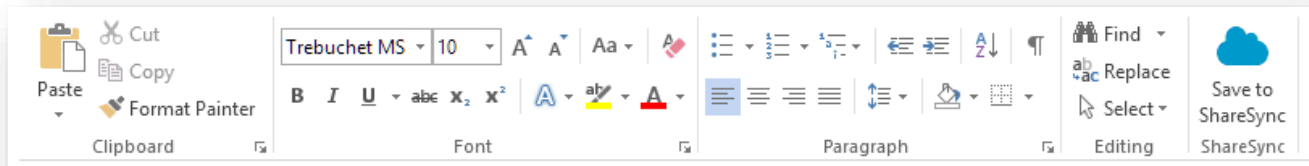
When working with files already located in ShareSync, the plugin allows for easy access to ShareSync functions from directly in the file. You can "Show Pane" from the ribbon to access the following capabilities:

- View the location of the file. You can share the file location with collaborators via email
- View file size and access permissions
- Share the file as a web link
- Lock the file for exclusive editing rights to prevent overwrites and conflicts
- View version history and open previous versions of a file
- Co-editing support to manage multiple users editing a file at the same time
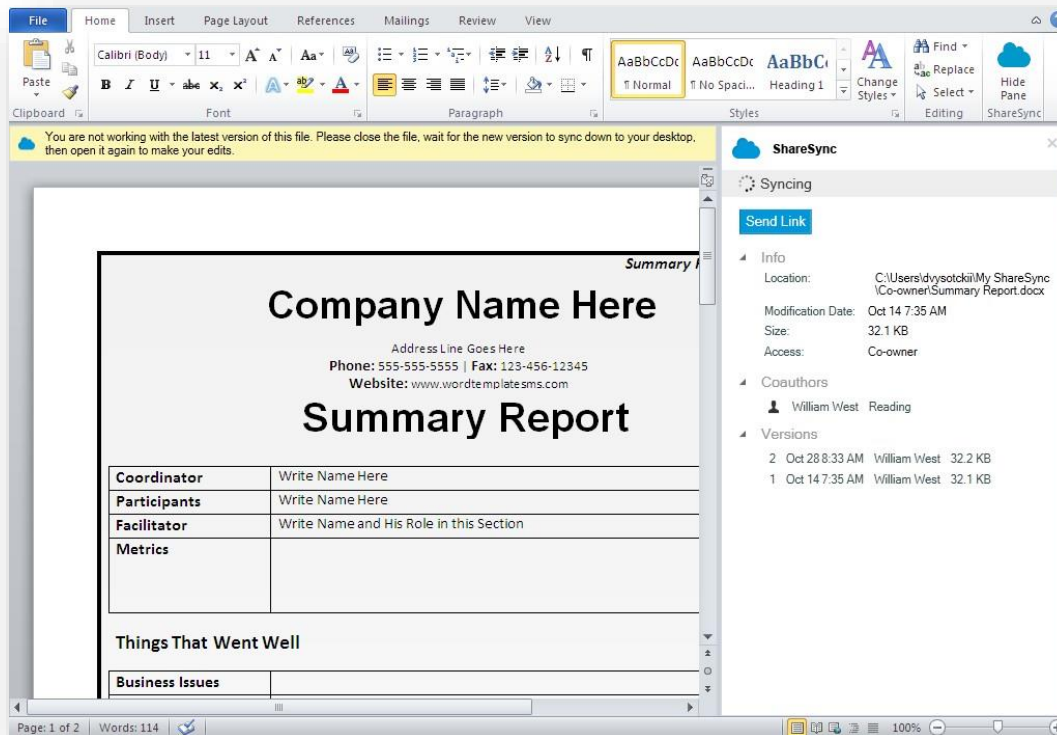
CO-EDITING

Co-editing support is available for Word, Excel, and PowerPoint files in shared folders.

- The plugin pane will show you who else is editing or reading the same file
- The plugin automatically locks files when editing to eliminate co-editing conflicts
- The 1st user who edits a shared file becomes the master. The master can continue saving changes into the original file.
- 'Save' attempts by other collaborators are intercepted and they are encouraged to save their changes into another file name.
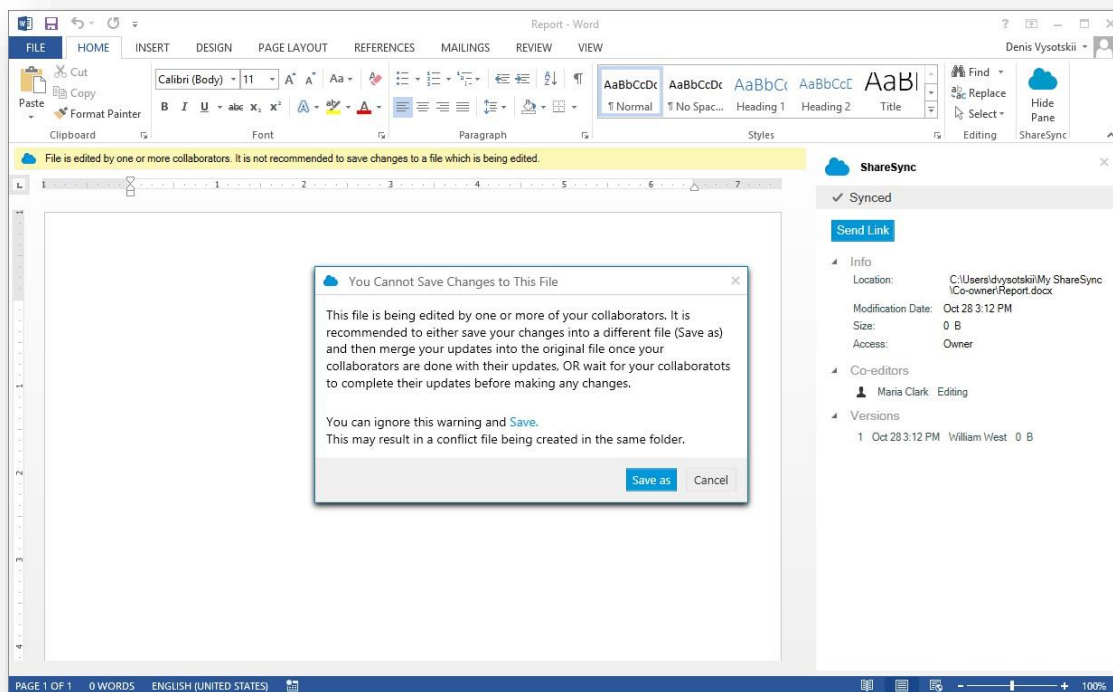

MICROSOFT OUTLOOK PLUGIN

The Microsoft Outlook plugin will allow you to easily replace email attachments with web links that open files using ShareSync. This is useful when sharing large files over email and when sharing large files with people outside your company, and especially so if attachments are larger than the maximum limit imposed by an email system.

Access the Outlook Plugin Settings Menu from the ribbon within Outlook.
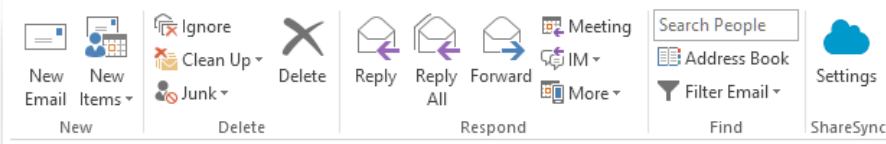
From settings you can set the following options:

- Configure the attachment replacement policy based
- Set the size of files over which attachments should automatically be replaced
- Automatically password-protect links
- Choose to be prompted for approval every time the plugin replaces files with links
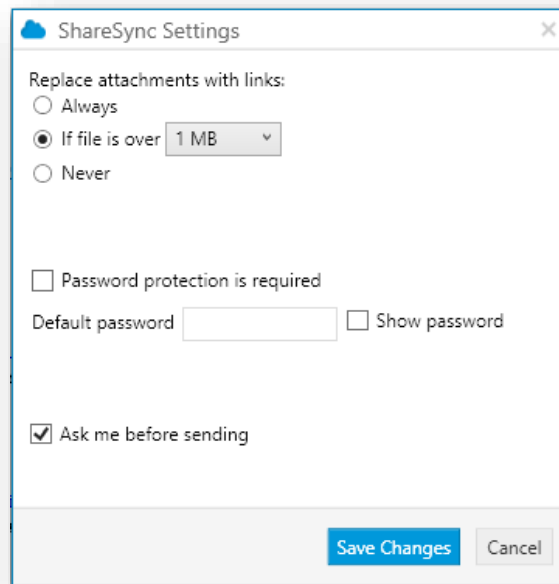
You can continue to use the standard Outlook Attach File button to attach files. ShareSync will only replace files with links if attachment policy requirements are met.

When recipients receive the email and click on the ShareSync web link, the files will be downloaded from ShareSync Web.