



Private Cloud Administration Console Overview

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SYSTEM REQUIREMENTS:

For best results, use Google Chrome, Mozilla Firefox, or Microsoft Edge.

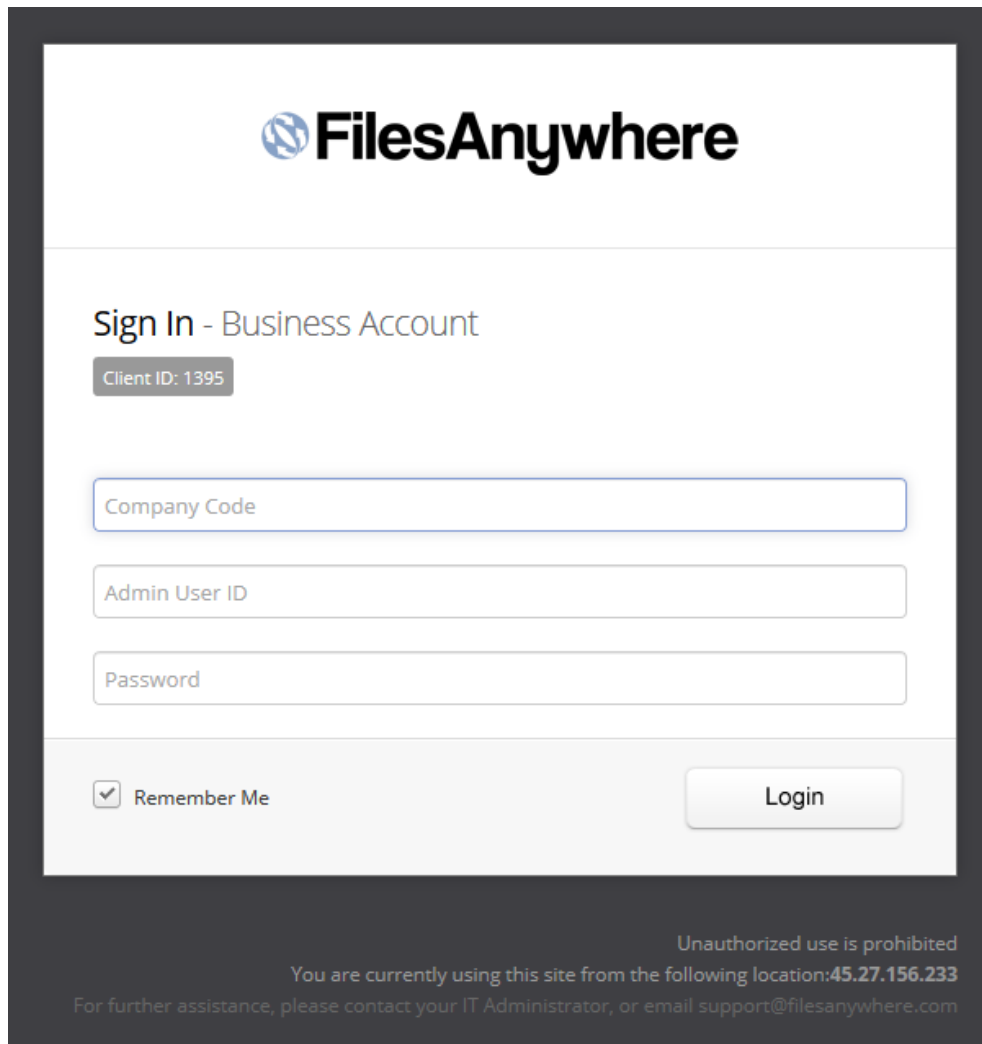
For the most productive viewing, use a 1920x1024 screen resolution or higher.

Introduction

The FilesAnywhere Private Cloud Administration Console (or “Admin Console”) is an efficient and powerful tool, which you use from any computer to manage your company’s entire private cloud portal site. This is the only tool you need to maintain users, divisions, admins, define global security settings, setup folder sharing, create role-based permissions, change system defaults, view reports and monitor site usage.

Accessing Your Admin Console

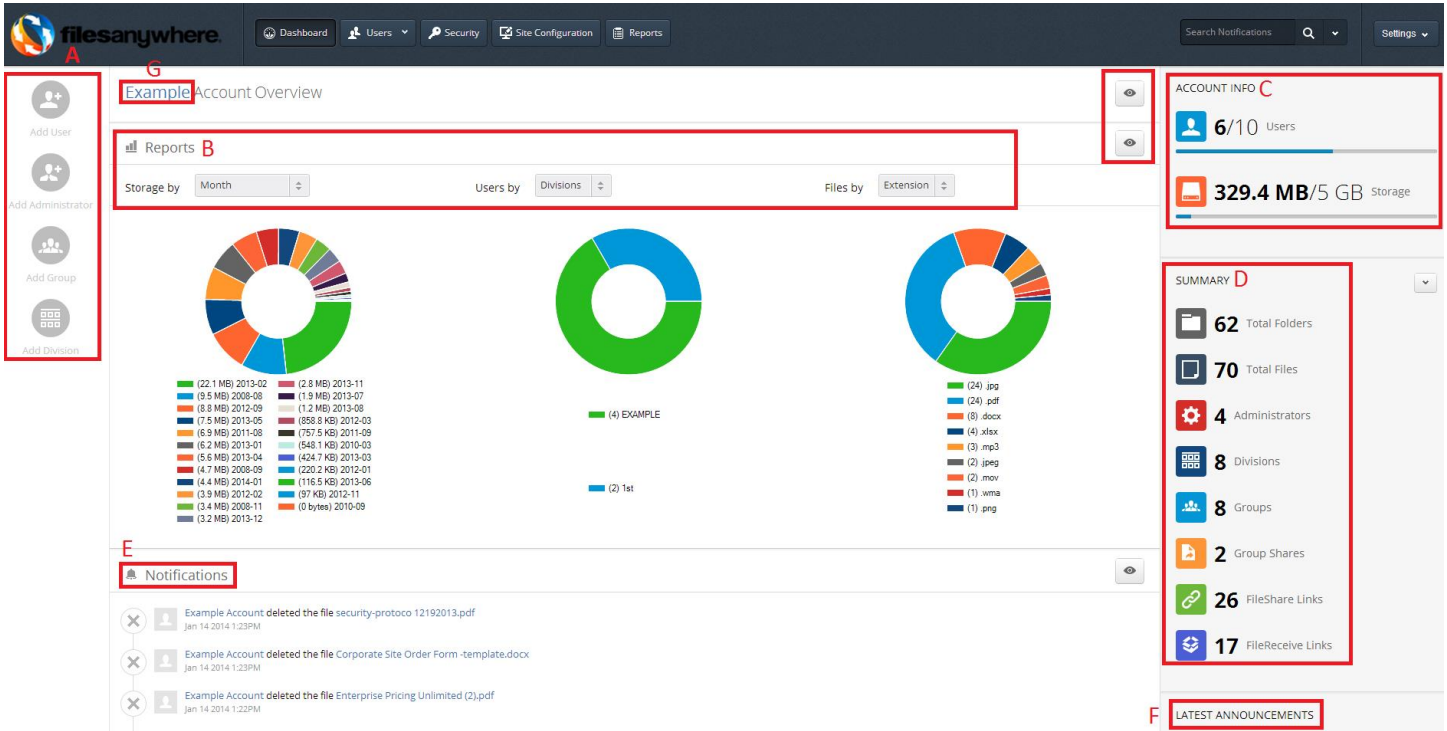
Enter your **Company Code**, **Admin User ID**, and **Password** to gain access to the Admin Console – these are all provided via email.



The screenshot shows the FilesAnywhere login interface. At the top is the FilesAnywhere logo. Below it, the text "Sign In - Business Account" is displayed. A grey box shows "Client ID: 1395". There are three input fields: "Company Code", "Admin User ID", and "Password". A "Remember Me" checkbox is checked. A "Login" button is on the right. At the bottom, there is a disclaimer: "Unauthorized use is prohibited. You are currently using this site from the following location: 45.27.156.233. For further assistance, please contact your IT Administrator, or email support@filesanywhere.com".

Dashboard Overview

The new dashboard provides administrators with information about their account at a glance. The sections of the dashboard are labeled below:



- A. **Quick Add** – From the dashboard the administrator can quickly add a user, another administrator, a group, or a division.
- B. **Reporting** – The drop down menus alter the statistics displayed in the donut graphs below the red box. The admin can view the storage being used, how the users are disseminated into their respective divisions or groups, and the files displayed by size, date, tag, file type, users, and extension.
- C. **Account Info** – Displays how many user accounts are being used out of the total available amount and below it shows the used space out of the available amount.
- D. **Summary** – This quick summary displays users, folders, files, groups, divisions, and other account information at a glance.
- E. **Notifications** – Displays all actions across all accounts in real time.
- F. **Latest Announcements** – FilesAnywhere's most recent announcements.
- G. **Hyperlink** – The account name is also a hyperlink to the user login portal.
- H. **Eyes** – These buttons hide and unhide the categories.

Creating Divisions



Add User

Once you have successfully logged into your Administrator Console you will have the ability to create and edit users, divisions, and groups. Click on “Divisions” to start the process of adding a new division to your account.



Add Administrator

What are Divisions and why would I use them?

Divisions are a way of segregating users for easy search, classification, and prevention of shared data. They also allow Admins to specifically monitor predetermined Divisions rather than having one person overview all accounts.

- EXAMPLE -



Add Group

Sam in the Payroll Division can't share his info with Bob in the Support division. Creating separate divisions allows the users to collaborate with coworkers in their department but keeps the data segregated.



Add Division

Division Details | Contact User | Administrators

A Division Code | **B** Division Name

Description

C Maximum Users | **D** Allotted Storage Space (MB)

E SHARE PERMISSIONS

Sharing with All | Sharing with Division | No Sharing

Cancel | Previous | Next | Save

Creating Divisions (cont.)

Follow the instructions below using the guide letters for more information.

- A) **Division Code** – typically an abbreviation of the Division Name.
- B) **Division Name** – name of the division (i.e. Marketing or Sales).
- C) **Maximum Users** – total number of users allowed in division.
- D) **Allotted Storage Space** – maximum allotted storage space for the division.
- E) **Share Permissions** – if users are able to create Groupshares and with whom.
 - **Sharing with All** – allows users to create Groupshares with all users in the system.
 - **Sharing with Division** – allows users to create Groupshares only with others inside the division.
 - **No Sharing** – disallows any Groupshares from being created by users in the division

Add Division ×

Division Details Contact User Administrators

CONTACT INFORMATION

Name	Last Name	Email
Mobile Number	Office Number	

CONTACT LOCATION

City	Select a State
Zip Code	Country

Cancel ◀ Previous Next ▶ Save

Creating Divisions (cont.)

Add Division ×

☰ Division Details 👤 Contact User 👤 **Administrators**

Select Administrators for this division:

Search for an Administrator 👤 👤 Add Administrator **A**

<input type="checkbox"/>	Administrator Name	Permission Role	Created On
No administrators found. B			

C

The **Contact User** is the main contact and head of the division. Fill out the **Contact Information** and then click **Administrators** to the right of the **Contact User** tab to continue.

- A.) Click here to **Add Administrator to Division**
- B.) Division **Administrators** will appear here
- C.) Click **Save** to complete Division creation

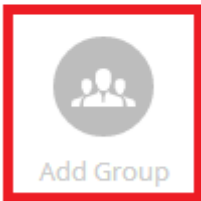
Creating Groups



Add User



Add Administrator



Add Group



Add Division

What are Groups and why would I use them?

A Group is a collection of permissions (folder access rights), and a list of users that are associated with that set of permissions.

If you add a new user to the group, they will inherit the Group's rights and permissions. If you remove a user, the rights and permissions will be removed for that user.

- EXAMPLE -

Steve is added to the Marketing Group and his account automatically has all the shares and permissions setup. James moves from Support to Sales Group and his old setup is removed and the new setup is automatically created.

Adding a New Group

Now we'll move on to Group creation. Click **Add Group** to continue.

Starting with the **Group Details** enter a **Group Name** and assign the group to a division (**Select Division** to choose a division).

Add Group ✕

Group Details Security Sharing Users

GROUP INFORMATION

Group Name

DIVISION

Select Division

Cancel Next Save

Click Next to continue.

Creating Groups (cont.)

The **Security** section allows you to enable Multi-Factor Authentication for group members.

The screenshot shows the 'Add Group' dialog box with the 'Security' tab selected. The 'Security' tab is highlighted with a red box. Below the tab, there are three sections: 'MULTI-FACTOR AUTHENTICATION', 'Verification Code delivery method', and 'Allow users to bypass Multi-Factor Authentication'. The 'Enable Multi-Factor Authentication' checkbox is checked and labeled 'A'. The 'Verification Code delivery method' is set to 'SMS Text Message' and labeled 'B'. The 'Allow users to bypass Multi-Factor Authentication' checkbox is unchecked and labeled 'C'. Below this, there is a field for 'Remember successful logins on device for' set to '0' days. At the bottom, there are buttons for 'Cancel', 'Previous', 'Next', and 'Save'.

- A) **Enable Multi-Factor Authentication** – If you have MFA enabled for the site and it is set to ‘Configured Groups and Users’, you’ll be able to enable MFA here.
- B) **Verification Code Delivery Method** – This is where you will choose what delivery method suits your group best.
 - a. **SMS Text Message** – Upon login, the user will be prompted to enter their phone number in order to receive a SMS message.
 - b. **Email** – Upon login, the user will be prompted to enter their email address in order to receive a verification code.
 - c. **Phone Call** – Upon login, the user will be prompted to enter their phone number in order to receive a phone call with the verification code.
 - d. **User Defined** – Upon login, the user will be given the choice as to which method to use in order to receive the verification code.
- C) **MFA Bypass** – This allows your users to bypass the verification for a certain number of days.

Click Next to continue.

Creating Groups (cont.)

The **Sharing** section defines what shared folders the group’s members can access.

A) **Choose User** – Type in the user or select them using the button to the right.

B) **Choose Folder** – Select that user’s folder you want the group to access.

C) **Assign a Permission** – Select the permission type you want to assign:

Assign a Permissions: ?

- Read Only** – Users may only download a read-only version of files.
- Full Access** – Users can fully utilize all features.
- Create and Update** – Users can only create, add or update files.
- Master Access** – Users have full access, plus they can manage folder sharing permissions and Groupshare members.

D) **Add Shared Folder** – Click this button to Add the Shared Folder.

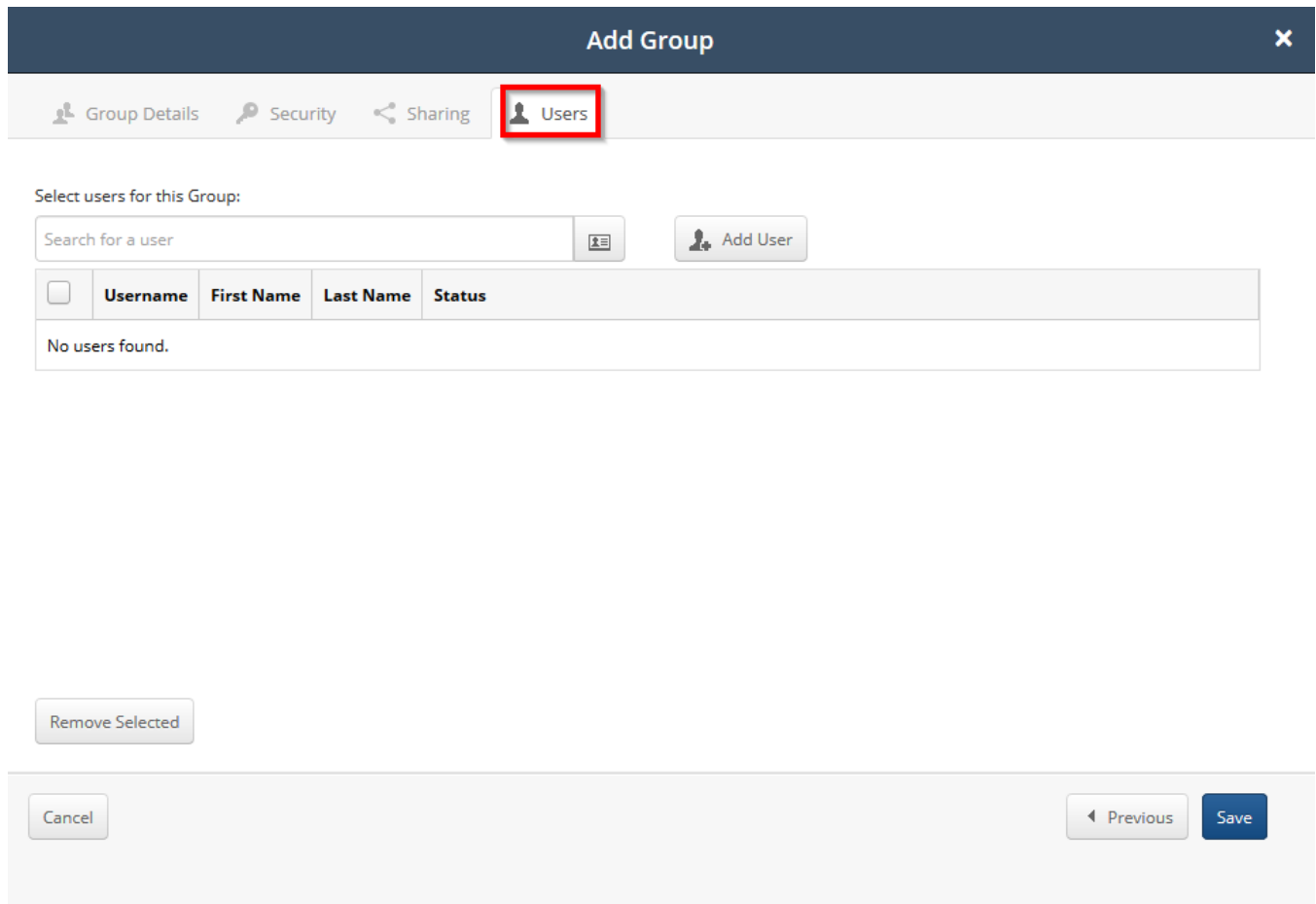
E) **No Shared Folder Found** – This section displays folders being shared.

Click Next to continue.

Creating Groups (cont.)


The **Users** section defines which users belong to the group.

Now you can add users to the new group. Type in their username or click the button to the right of the Choose User field and then click Add User. All of the group's users will appear below.



The screenshot shows the 'Add Group' dialog box with the 'Users' tab selected. The 'Users' tab is highlighted with a red box. Below the tab, there is a search bar with the text 'Search for a user' and a magnifying glass icon. To the right of the search bar is an 'Add User' button. Below the search bar is a table with the following columns: Username, First Name, Last Name, and Status. The table is currently empty, and the text 'No users found.' is displayed below it. At the bottom of the dialog, there are buttons for 'Remove Selected', 'Cancel', 'Previous', and 'Save'.

Select users for this Group:

Search for a user 

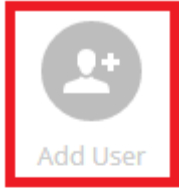
<input type="checkbox"/>	Username	First Name	Last Name	Status
No users found.				

You can return to this screen to maintain which users belong to the group, without defining the detailed folder permissions each time.

This is the beauty of groups – you are defining **Role Based Access Control (RBAC)** by first configuring a *collection of permissions*, then maintaining who is assigned to this collection of permissions.

Other systems require you to setup folder permissions one user at a time, which is tedious and leads to a loss in control in how security permissions are maintained.

Creating Users



Add User



Add Administrator



Add Group



Add Division

What is a User and why would I use it?




Users are created for everyone that logs in and uses the service for access to shared folders, storing files, sharing, and tracking. Each user can be assigned their own personal space or not at all. Each user may also be assigned access to any combination of shared folders from other users, or not at all. Permissions can be unique to the user, which allows flexible sharing, or permissions can be based on Group membership for role-based security.

- EXAMPLE -

Sam has 2GB of personal space and has **read-only** access to Jamie's shared folder. Sam is able to upload his own files into his own space, plus he can view and download **read-only** versions of Jamie's files, but is unable to upload or modify Jamie's files.

Adding a New User


To begin the user creation process click the **Add User** button. The new user creation page will appear as below; follow the steps and use the pictures as a guide to complete the user creation. Under the **User Details** section fill out the user's Personal Information.

<p> User Details</p> <p> User View Settings</p> <p> Advanced</p>	<p>PERSONAL INFORMATION</p> <table border="1"><tr><td><input type="text" value="First Name"/></td><td><input type="text" value="Last Name"/></td></tr><tr><td><input type="text" value="Email"/></td><td><input type="text" value="Phone"/></td></tr></table>	<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="Email"/>	<input type="text" value="Phone"/>
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>				
<input type="text" value="Email"/>	<input type="text" value="Phone"/>				

Creating Users (cont.)

USERNAME
& PASSWORD

Username

Password Confirm Password 

Do not email details to user

Enter a **Username** and **Password** for the account.

By leaving the password fields blank, the user will be instructed to create their own password in their welcome email.

Decide if you wish to enable **Multi-Factor Authentication** and if you wish for it to be from the **Site level, Group level, or User level**.

MULTI-FACTOR
AUTHENTICATION

Apply Multi-Factor Authentication from

Site level Group level User level

Enable Multi-Factor Authentication

Verification Code delivery method:

SMS Text Message Email Phone Call User Defined

Allow user to bypass Multi-Factor Authentication on their device after a successful login

Remember successful logins on device for days before device must be re-authenticated

If using MFA, select the **Delivery Method** and **Bypass** settings as needed.

Creating Users (cont.)

Select a **Division**, assign a **Manager**, and assign **Personal Storage Space** if desired...

DIVISION

MANAGER




STORAGE SPACE

 Assign Personal Space

Note: The Manager field only pertains to the Workflow module.

You can share existing folders from *other users* to this new user. Choose an *existing user*, select a folder to be shared, assign a permission, and **Add Shared Folder**....

FOLDER SHARING


Select user name of shared folder:  Select folders that new user can access:  Assign a Permissions: 

<input type="checkbox"/>	Shared By	Shared Folder	Permission	Shared On
No shared folder found.				

Creating Users (cont.)

Add the new user to a **Group**...

SELECT GROUP

Search Group 

<input type="checkbox"/>	Group Name	Members	Shared Folders
No Groups found.			

Add any notes regarding this user in the **Notes** section.

NOTES

Notes

Under the **User View Settings** the admin is able to set the visual settings of the user account like the default **Interface Setting**, **Interface Option**, and **Time & Language**.¹

User Details

- User View Settings**
- Advanced
- Plugins
- CloudSync Defaults

INTERFACE SETTING

Default View:

View Type:

INTERFACE OPTION

Starting Page After Login:

File/Folder Default Sorting:

Tree View Options:

- Show GroupShares on top
- Show empty folder icon

UPLOAD SETTINGS

Default Upload Method:

TIME & LANGUAGE

Creating Users (cont.)

¹ Note: these system-wide defaults for users can be set under **Site Settings**.

The recommended selection for the **Interface Setting** is A (**Tree View**). These options can be changed by users also based on their preferences, once they login and go to their Profile settings.

The **Advanced** settings are (A) recommended left unchecked and (B) checked. Note: **WebDAV Access** and **FTP/SFTP** will not register in the history tracker, so if you want to see every action across all accounts do not enable either **WebDAV** or **FTP/SFTP**. (C) Leave it checked.

A USER SETTINGS

- Lock user profile
- Enable comments on files and folders
- Allow users to GroupShare
- Log all download activity
- Automatically purge user files ?

B

REMOTE ACCESS PERMISSIONS

- Allow WebDAV access
Select Home Folder: Select Home Folder
- Allow FTP access
Select Home Folder: Select Home Folder
- Allow SFTP access
Select Home Folder: Select Home Folder

C

WORKFLOW

- Allow user to create workflows

The **Plugins** section is where the Administrator can (A) enable and disable Service Plugins and (B) make modifications to the plugin itself.

USER DETAILS

- User Details
- User View Settings
- Advanced
- Plugins**
- CloudSync Defaults

SERVICE PLUGINS

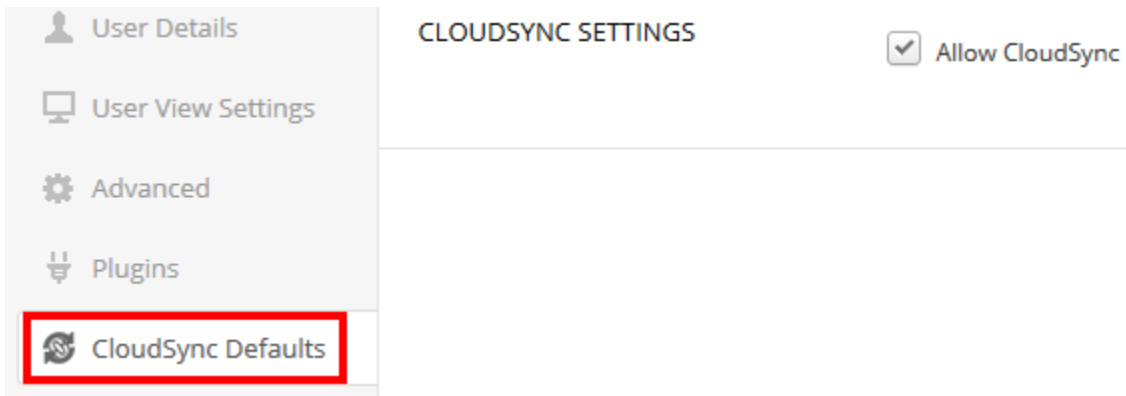
Fax Service **A** ON

Paperless faxing! Send and receive faxes entirely by web, using your account. Fax any standard document or graphic file. Receive faxes using a dedicated fax number and view all faxes online.

- Sending Faxes **B**
- Receiving Faxes

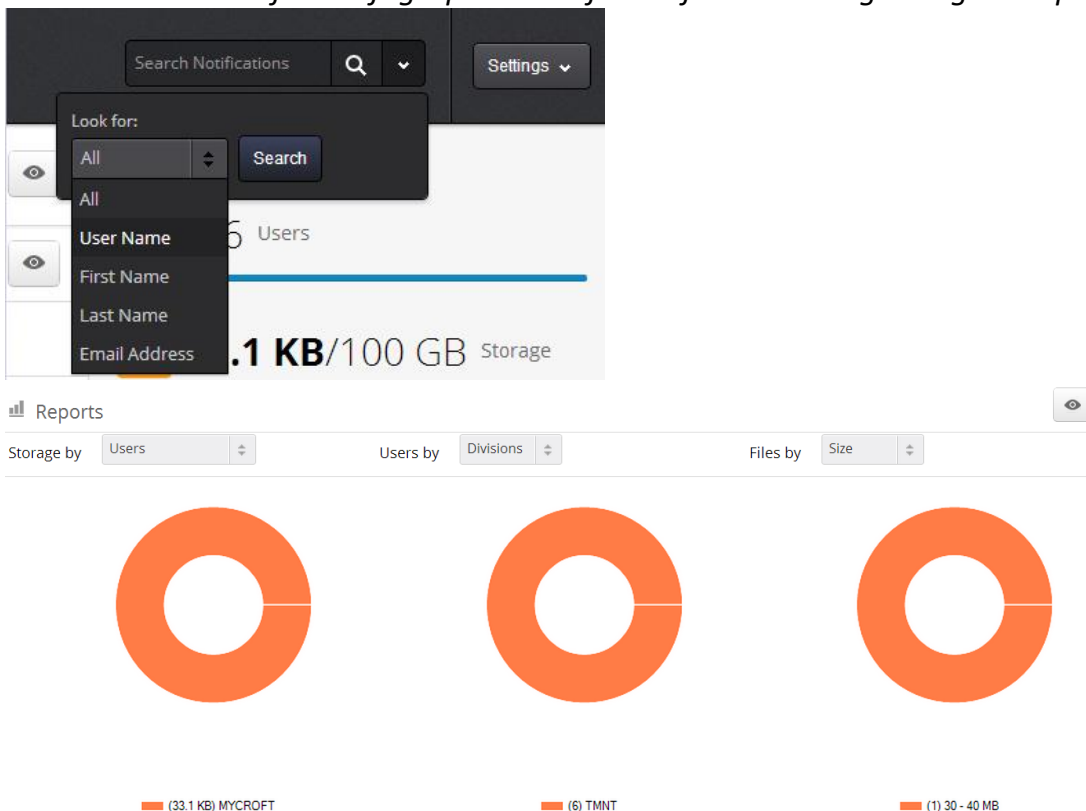
Creating Users (cont.)

The **CloudSync Defaults** section is where you can choose to enable or disable access to the CloudSync application for the user.



Now you're done creating the user. Repeat this process until all the users are created (and customized if necessary).

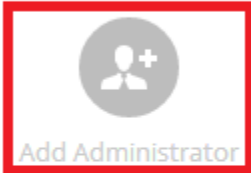
Quick Tip: Using the search bar will alter the infographs – administrators can type in a username and all of the infographs will reflect information regarding that specific user.



Creating Administrators



Add User



Add Administrator



Add Group



Add Division

What is an Administrator and why would I need one?

You can create additional **Administrators** to manage the entire account or to manage individual **Divisions**, if you wish to delegate administrative functions to individual Division Administrators.

- EXAMPLE -

Richard is the account's **Super Administrator** and is able to set permission levels for all users and new **administrators**. Each additional **Administrator** is created with customized permission levels; Peter is an **Administrator** for the **Marketing Division** and is restricted to creating and maintaining all marketing users.

How to Add an Administrator

Click **Add Administrator** to create the **administrator**. The first page will ask for the contact information, username and password.

Admin Details | Permissions | Divisions

CONTACT INFORMATION

First Name * | Last Name * | Email *

Phone Number | Fax Number

USERNAME & PASSWORD

Username *

Password | Confirm Password ?

Do not email details to admin

STATUS

Active | Locked | Disabled

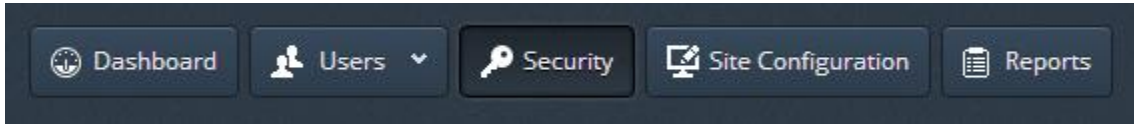
The Permissions and Divisions tabs offer even more customizability. Additional help with these advanced features is available in KB articles or via our Support line.



sales@filesanywhere.com
Phone (888) 661-6565
www.filesanywhere.com

Global Security Settings

The **Security** page allows the administrator to manage password requirements, username requirements, Multi-Factor requirements, login attempts, and IP Address settings.



Security

USERNAME MANAGEMENT

Minimum character length: Characters

Require at least one number

PASSWORD COMPLEXITY

Require at least one uppercase letter

Require at least one lowercase letter

Require at least one number

Require at least one special character (@,\$,etc.)

Password may not contain Username

Password may not contain user's full name.

Cannot start or end with numbers

Password must follow at least rules from the above categories

PASSWORD
MANAGEMENT

Minimum character length: Characters

Maximum Password Age: Days (0 means never)

Cannot reuse same password for: Password Changes

Minimum Password Age: Days (0 means never)

Lockout account after: Failed Attempts (0 means no limit)

Allow Forgot Password recovery option

MULTI-FACTOR
AUTHENTICATION

Enable Multi-Factor Authentication

Required for:

Verification Code delivery method:

Allow users to bypass Multi-Factor Authentication on their device after a successful login

Remember successful logins on device for days before device must be re-authenticated

LOGIN
FAILED ATTEMPTS

Maximum logins per day: Logins (0 means no limit)

IP ADDRESS
RESTRICTIONS

<input type="checkbox"/>	IP Address
There are no IP Address restrictions.	

Site Configuration

Similar to the Security page, **Site Configuration** contains settings that affect all users.



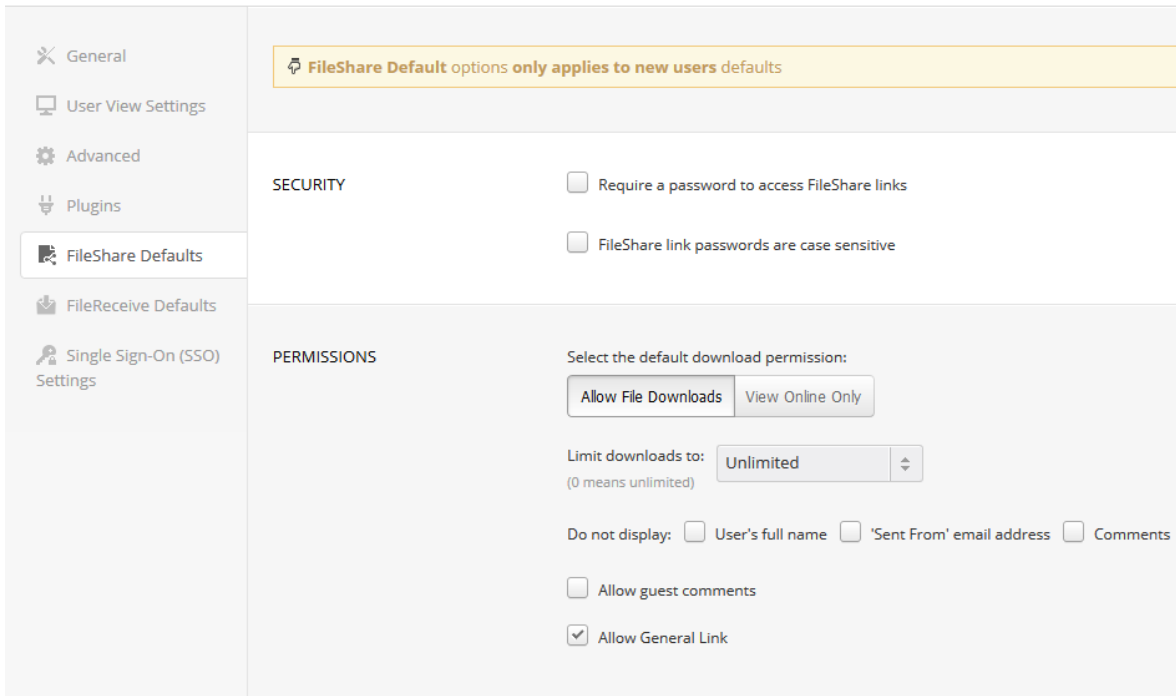
These global settings allow the **administrator** to optimize the default settings (i.e. sharing, display, plugins) for the users to better suit the company's requirements.

The **User View** settings allow you to change your **company branding** instantly.



Be aware that certain information maintained in the **Site Configuration** sections only affect **new users**. New users will inherit all new settings in these sections, whereas newly changed defaults in these sections will not impact settings previously saved for existing users. These New User Defaults are marked with a golden label (ex: FileShare Defaults).

Site Configuration



The screenshot shows the Site Configuration interface. On the left is a sidebar with navigation options: General, User View Settings, Advanced, Plugins, FileShare Defaults (highlighted), FileReceive Defaults, and Single Sign-On (SSO) Settings. The main content area has a yellow banner at the top stating "FileShare Default options only applies to new users defaults". Below this, the "SECURITY" section contains two checkboxes: "Require a password to access FileShare links" and "FileShare link passwords are case sensitive", both of which are unchecked. The "PERMISSIONS" section includes a "Select the default download permission:" dropdown menu with "Allow File Downloads" and "View Online Only" options. Below this is a "Limit downloads to:" dropdown menu set to "Unlimited" (with a note "(0 means unlimited)"). There are also checkboxes for "Do not display:" (User's full name, 'Sent From' email address, Comments) and "Allow guest comments" (unchecked), and a checked checkbox for "Allow General Link".

Further Help

This introduction does not cover every aspect or feature of the administration console, but it should get you started.

For questions or if you would like something explained in detail, you can always contact our USA-based support line or by email through our VIP support channel.

We are here to help you and your users get the most from your private cloud!

Corporate Technical Support:

[1-\(888\)-661-6565](tel:1-888-661-6565) USA Toll-Free

[1-\(972\)-893-3301](tel:1-972-893-3301) International

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