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The Business Cloud™
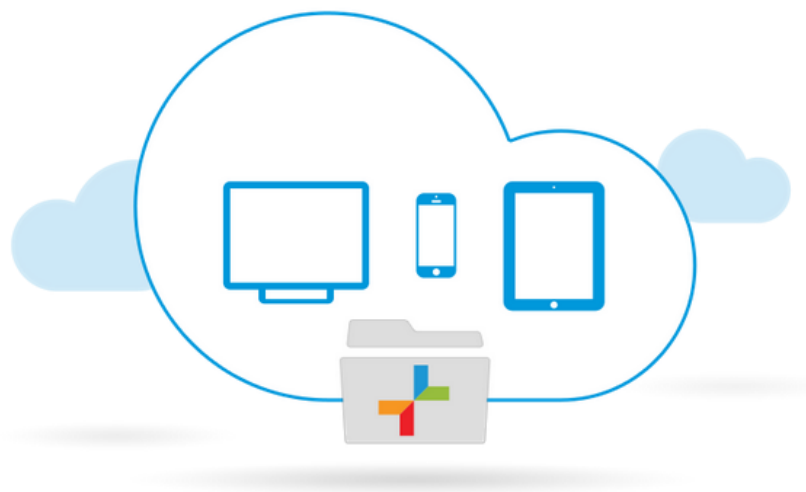
SecuriSync Get Started Guide for Win

WHAT IS SECURISYNC?

SecuriSync is a cloud file sync and share service. SecuriSync allows you to easily sync files between multiple computers, the SecuriSync Web App and mobile devices so that you can access your files whenever and wherever you need them. With SecuriSync, 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 SecuriSync. This document guides you through the steps to get started using SecuriSync on your desktop, on your mobile devices and by using SecuriSync Web.

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

Contents

USING SECURISYNC ON YOUR DESKTOP

The SecuriSync 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 SecuriSync client on each machine that will be used to sync or share files from the desktop. The SecuriSync desktop client should be installed on every SecuriSync user's machine in your company as well as any additional machines each user may use (i.e. laptop, desktop, home computer).

INSTALLING SECURISYNC

You can download the latest SecuriSync client from the Downloads tab either in My Services or SecuriSync Web App. The SecuriSync client can also be downloaded by your administrator from the SecuriSync tab in your HostPilot® 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 SecuriSync user, the preferred location of the My SecuriSync folder and it will give you the option to select the folders which you would like to sync to your computer (Windows only), 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 SecuriSync, you should install the new version on top of the old one. In this case, do not uninstall the old version of the client.
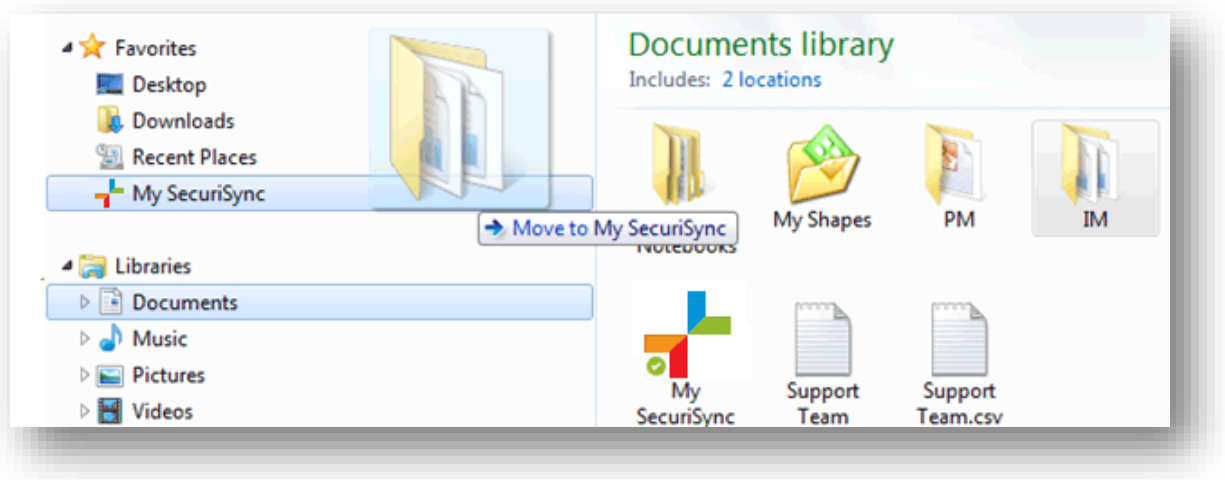
SECURISYNC FOLDER

Once SecuriSync is installed on a computer, it creates a designated "sync" folder called *My SecuriSync* and adds it to Favorites in Windows Explorer. The default location of the My SecuriSync folder is the root of your user profile: C:\Users\$username\My SecuriSync. 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 SecuriSync* folder are automatically synced to the cloud as well as all the user's devices where SecuriSync is installed.

Files and Folders can be moved to the My SecuriSync folder using standard file/folder operations: copy/cut and paste or drag-and-drop.

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

SECURISYNC IN THE SYSTEM TRAY

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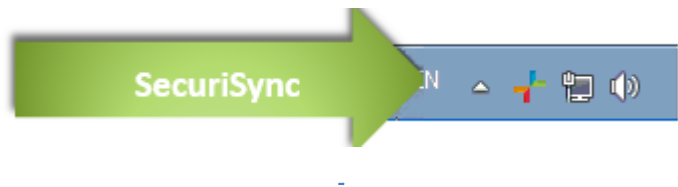
The following icons may appear depending on application status:

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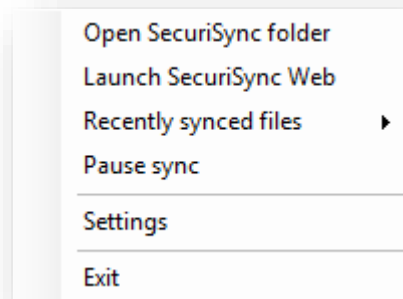
- **Recently synced** - 10 most recent files are shown
  - Green arrow shows files that you have recently modified on this computer
  - Blue arrow shows files that have recently been modified on your other devices, or by other users collaborating on shared content
  - Grey text and arrow document 4.docx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

SECURISYNC SETTINGS

In SecuriSync settings window users can to the following:
- Enable/disable SecuriSync Office plugin
- Enable/disable SecuriSync Outlook plugin
- Change location of My SecuriSync folder
- Choose folders you want to sync to this PC using Selective Sync
- Unlink SecuriSync folder from your account
- Create & send diagnostic report

SELECTIVE SYNC

- Selective Sync allows you to select the folders that you want to sync 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.
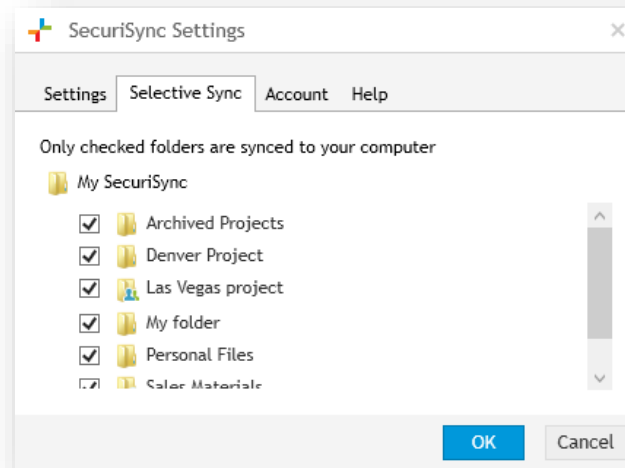
MANAGING SHARING PERMISSIONS IN THE SECURISYNC DESKTOP FOLDER

When exploring SecuriSync files from the My SecuriSync 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 SecuriSync 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 SecuriSync Web App to complete the action. In the example below, the folder "Webinar" is owned by the user. By right-clicking on the folder in their SecuriSync folder, they can choose whether to browse in My Services (or SecuriSync Web), Manage sharing, or Send a link.
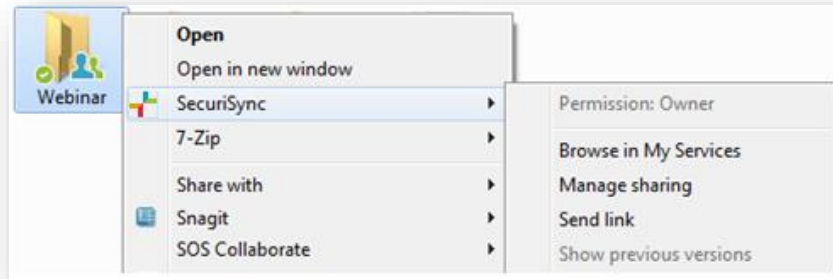
CONTEXTUAL ICONS: DETERMINING FILE SYNC STATUS & LOCATING SHARED FOLDERS

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

**SYNC** status icons show the user whether a file or a folder in their My SecuriSync 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 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, and delete files)
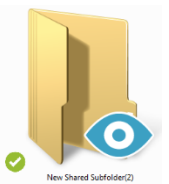
Folder is shared by another collaborator and user has 'view'-only permissions (e.g. user can view, but CANNOT edit, move, delete files)

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

SECURISYNC WEB

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

Directly from the SecuriSync web, you can:

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

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

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

2. Login to My Services
3. From the SecuriSync login page

The following functionality is available through SecuriSync Web:
1. Files & Folders: Search across all files and folders
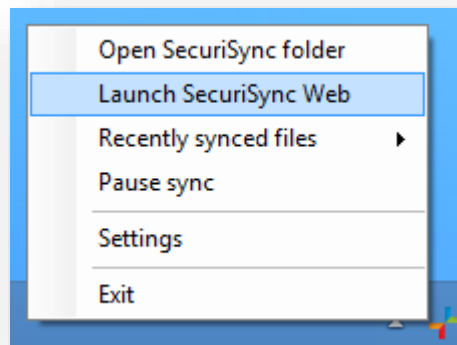2. Files & Folders: Share your files and folders
3. Files & Folders: Upload files to SecuriSync
   a. Uploaded files will be synced to all your computers and mobile devices that have SecuriSync installed
4. Files & Folders: Download files
5. Files & Folders: Create/Delete folders
6. Files & Folders: 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 SecuriSync Outlook Plugin
12. Downloads: Download SecuriSync desktop client and other SecuriSync Apps
13. Get Started: Quick access to SecuriSync documentation and FAQ.
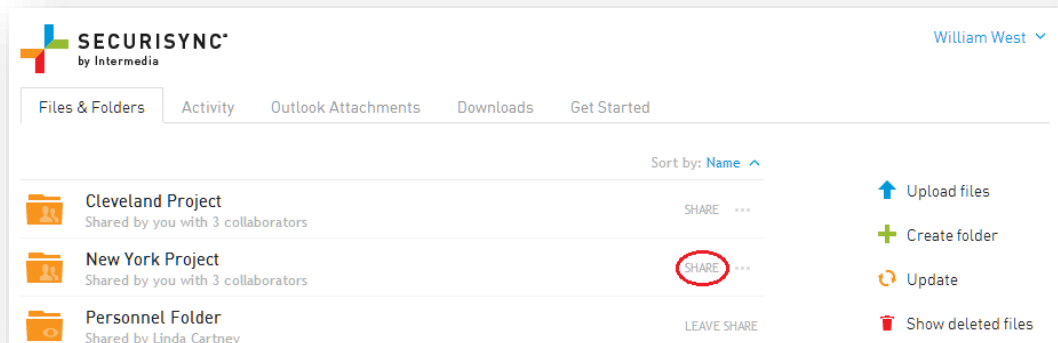14. Get Started: Submit product feedback to Intermedia

SHARING FILES AND FOLDERS WITH SECURISYNC

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

## SHARE WITH CO-WORKERS & EXTERNAL COLLABORATORS

From SecuriSync 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.

- Group sharing will be available if your Administrator has configured Exchange Distribution Lists within the company's Intermedia HostPilot 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.
- 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
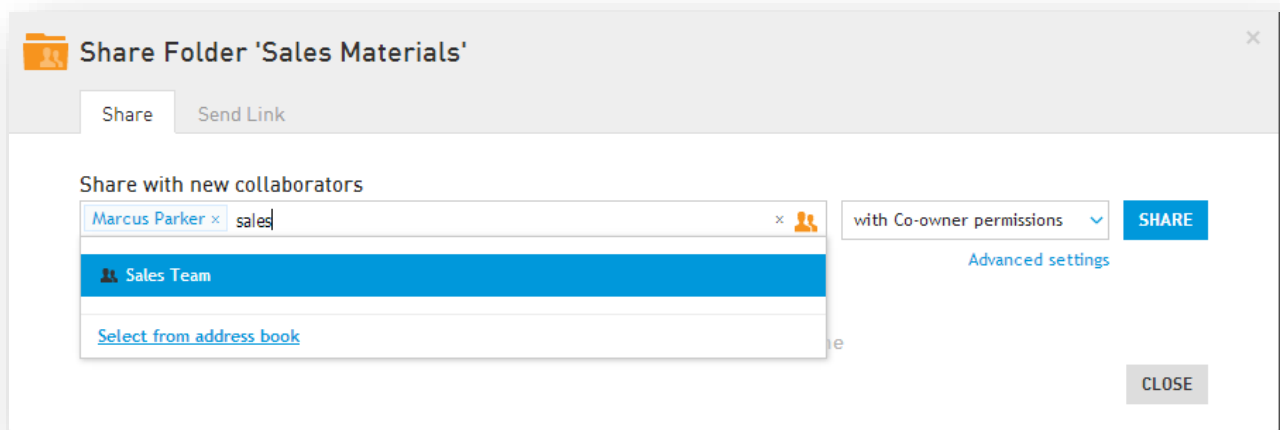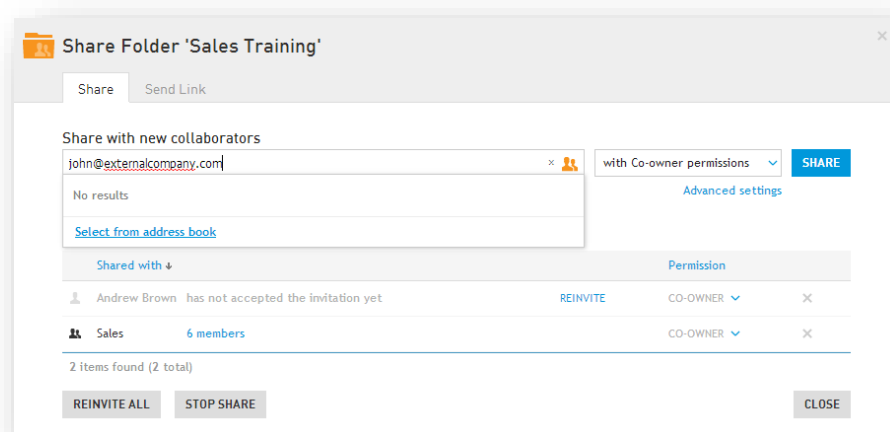
Sharing with Internal Collaborators and Groups
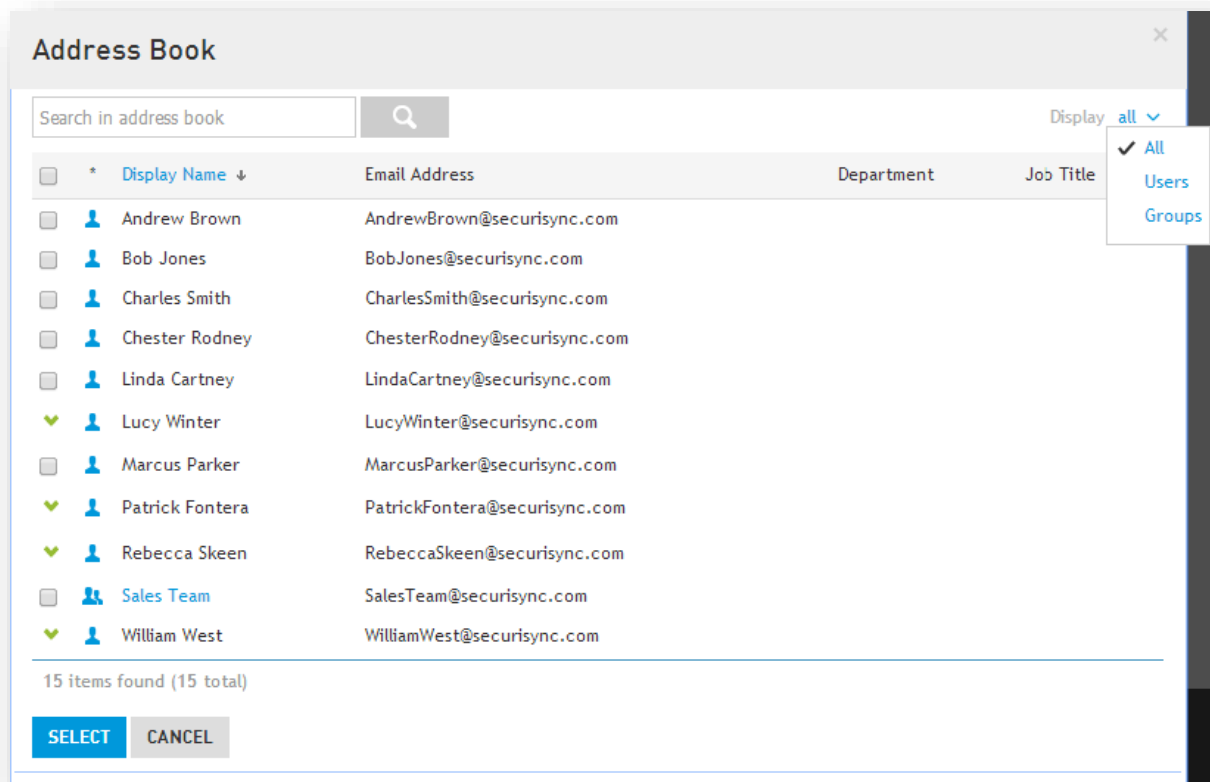
Click on the Address Book icon to view all Internal Collaborators and Groups
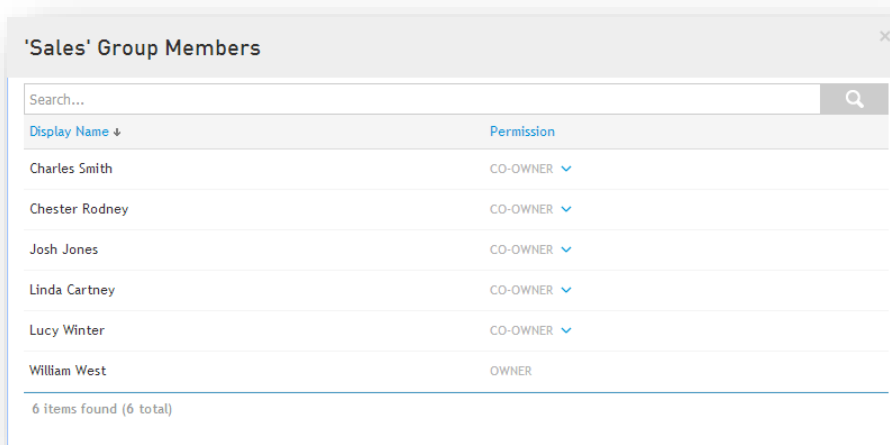
Click on Group name to view members

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 SecuriSync" 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.
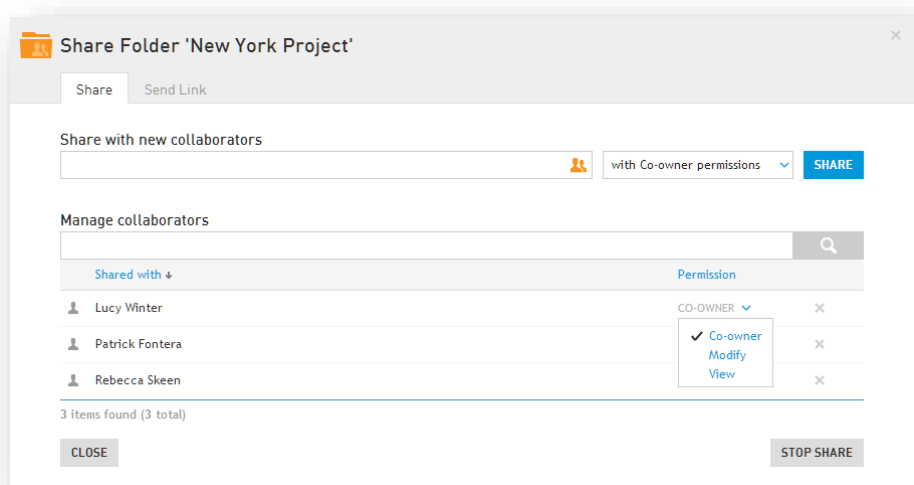

Once they have been given sharing permissions for a particular folder, invitees will receive an email notification. The notification contains a link that launches SecuriSync Web where they can accept the invitation. Invitees must accept the invitation before they can access content in the shared folder.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

SECURISYNC SUB-FOLDER SHARING

SecuriSync 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 SecuriSync" folder; this action will redirect you to SecuriSync Web App and allow you to configure sharing options.
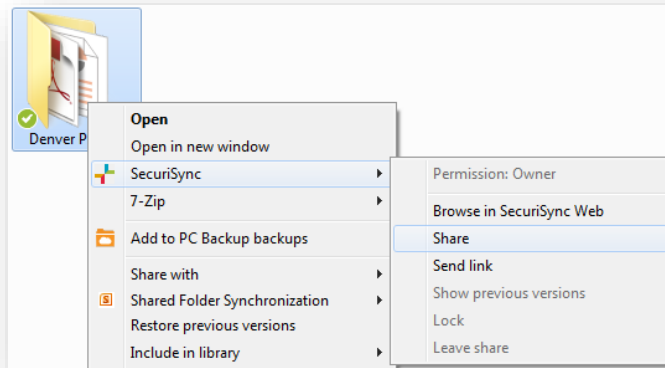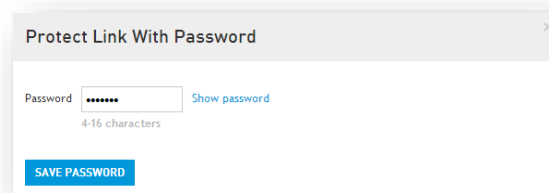

SEND LINK

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 SecuriSync 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 SecuriSync Web, select a file or folder, click "Share" and then choose the "Send Link" tab:
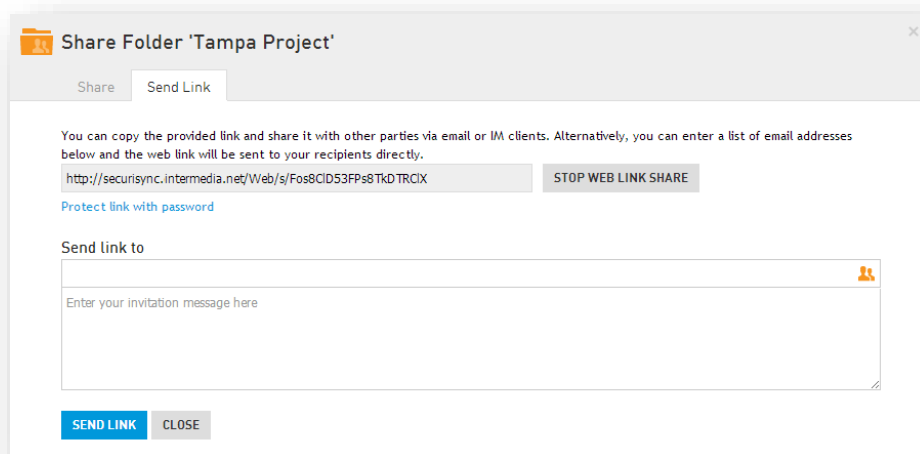
You can copy and paste the link and send it separately or email it directly from SecuriSync using this dialog box. If you wish to send from SecuriSync, enter the email address(es) to which to send the link. You can also include an optional message. You can choose to password-protect the link before sending 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 SecuriSync menu. You will be redirected to SecuriSync Web where you can generate and send the link.
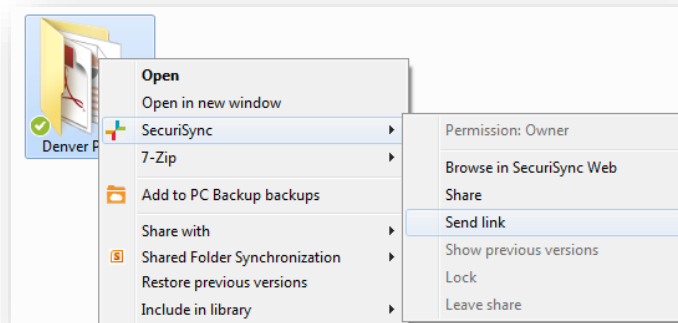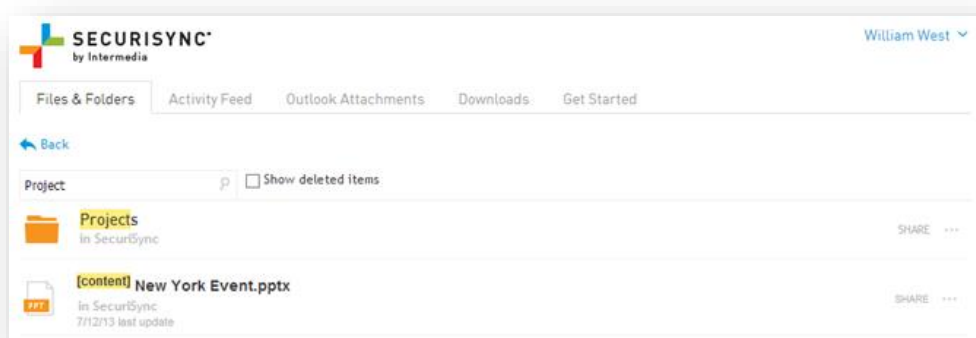
FULL TEXT SEARCH

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

Search 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.
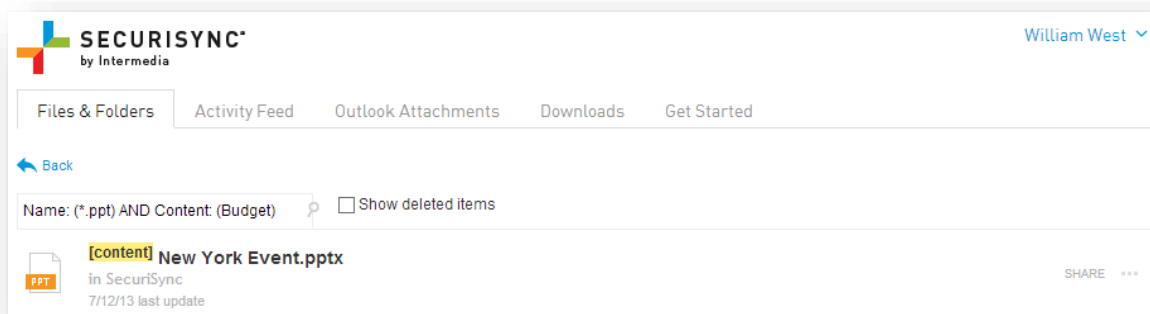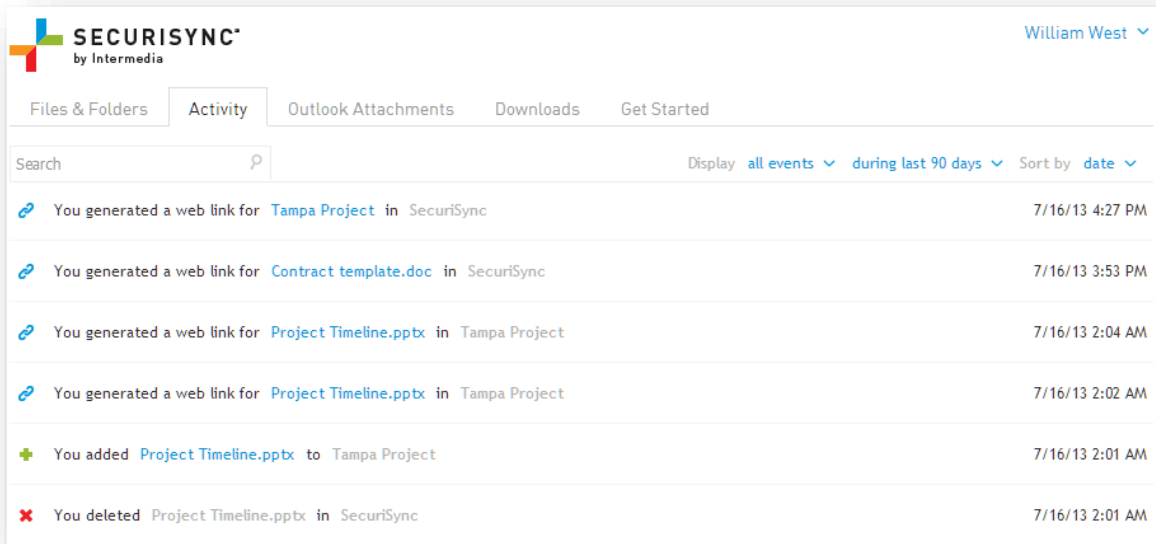
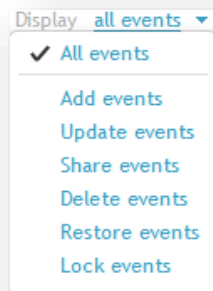- Learn more about search functionality in KB article

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
SecuriSync offers several features to manage files.

SECURISYNC RECYCLE BIN – 'SHOW DELETED FILES"

Deleted files and folders can be restored in SecuriSync 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 SecuriSync 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:
  - o 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.
  - o If you administrator has enabled the Recycle bin retention policy, some deleted files in your SecuriSync Recycle Bin may be automatically purged.
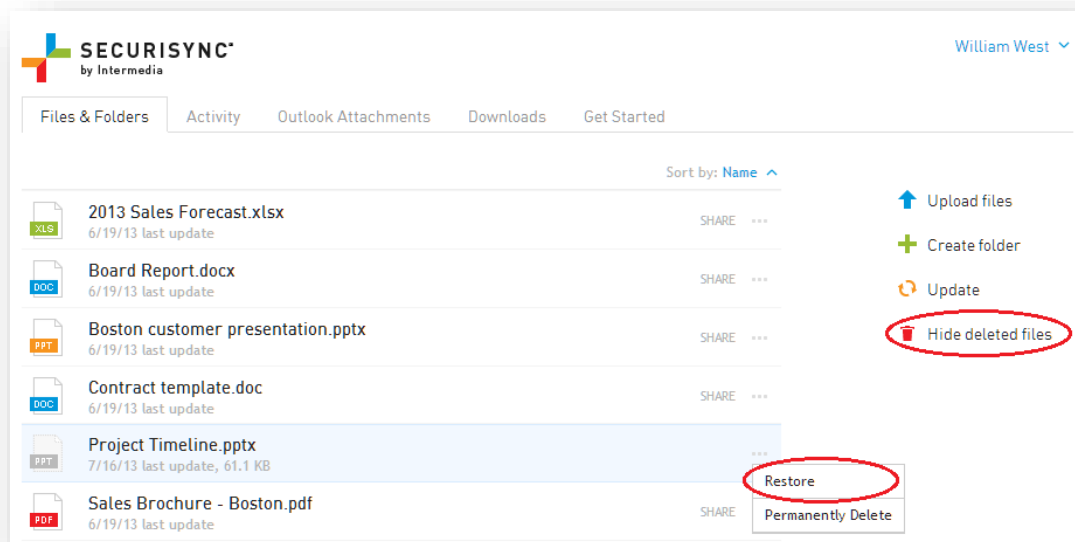

VERSIONING

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 SecuriSync Web App.
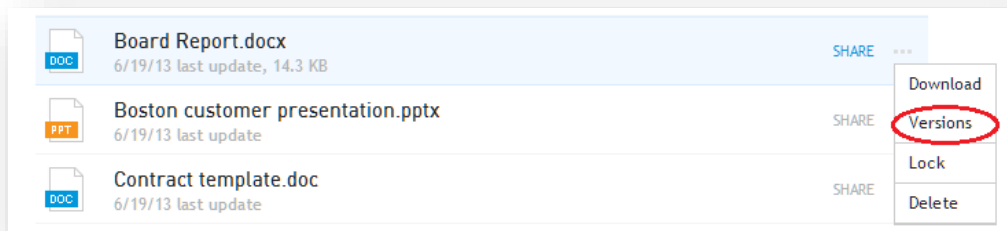
You will see a list of all versions that have been saved of the file, the collaborator, and the date and time stamp. You can restore or download any of the previous versions on this list.

- 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

SecuriSync 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 SecuriSync Web.
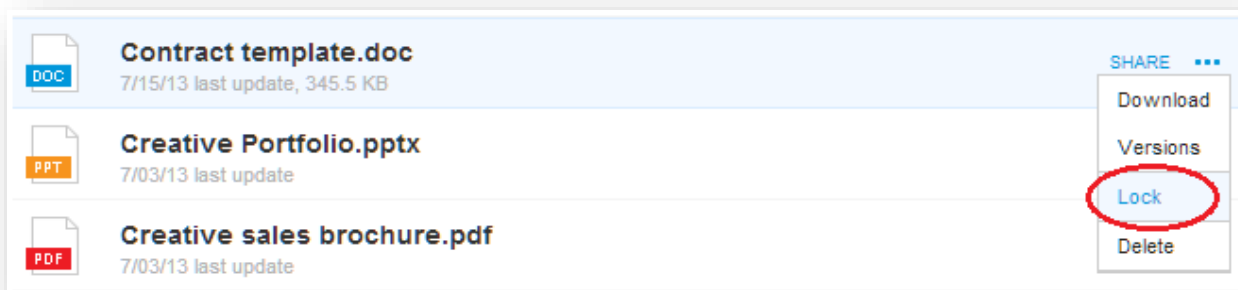
You can also lock a file from Windows Explorer in your SecuriSync folder. Right-click on the file you wish to lock and choose Lock from the SecuriSync options list. Once a file is locked, a padlock icon will appear next to it in the Files & Folders list.
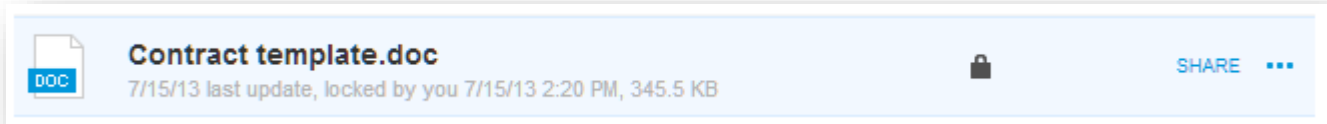
Files can be unlocked from either SecuriSync Web or the desktop in the same way they were locked. Collaborators can also request to unlock a file so they can make changes to rile by submitting a request through the web app.
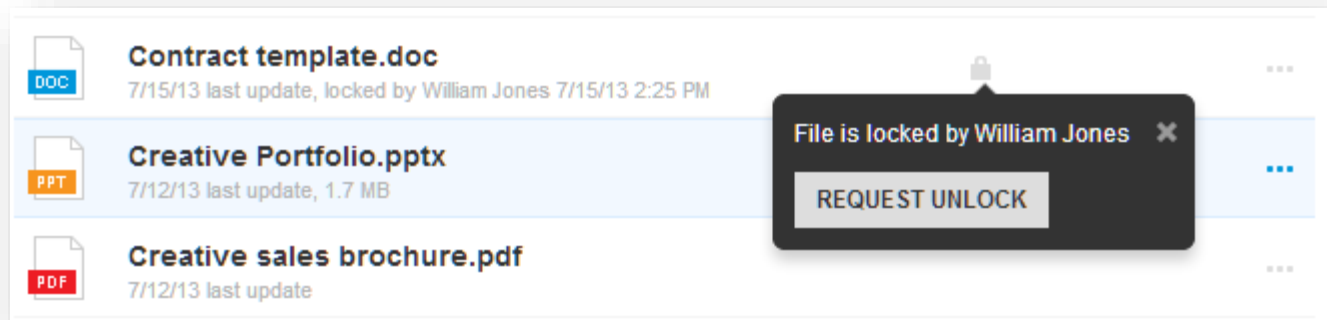
MOBILE SECURISYNC

You can use SecuriSync on your mobile phone to be able to view, manage, and share files from your iPhone, iPad, Android, Windows 8 Mobile or BlackBerry.

SecuriSync is currently available for the following mobile platforms:

- Android phones and tablets (Android 2.1 & higher)
- iPhone, iPod, iPad (iOS 5.0 & higher)
- Blackberry (Blackberry OS 5.0-7.1, Blackberry 10)
- Windows 8 Mobile

You can download the mobile applications from their respective app stores: Google Play, Amazon Appstore for Android, Windows 8 Appstore, Blackberry AppWorld and iTunes. Links are provided in SecuriSync Web.

Mobile applications provide the following features:

- View/Delete files and folders inside "My SecuriSync" 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
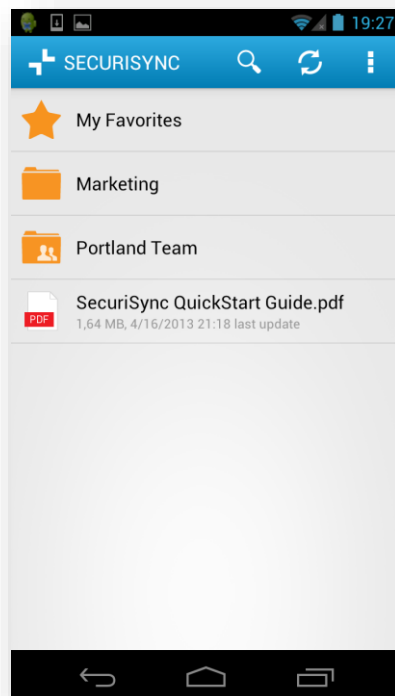- iOS app also provide the ability to print files
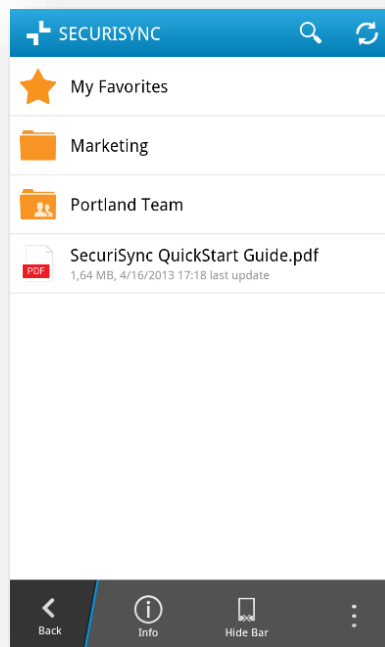
SecuriSync for the iPhone
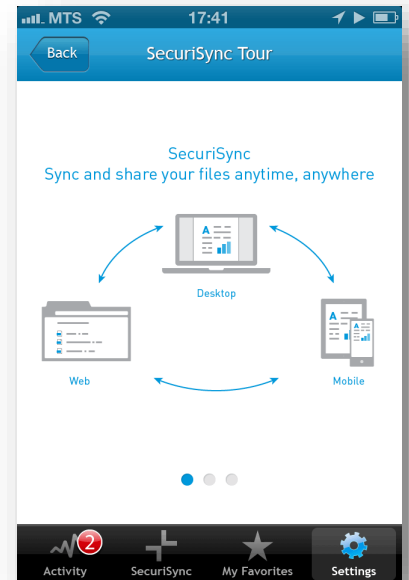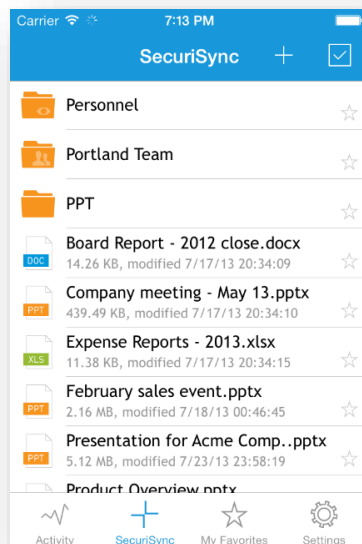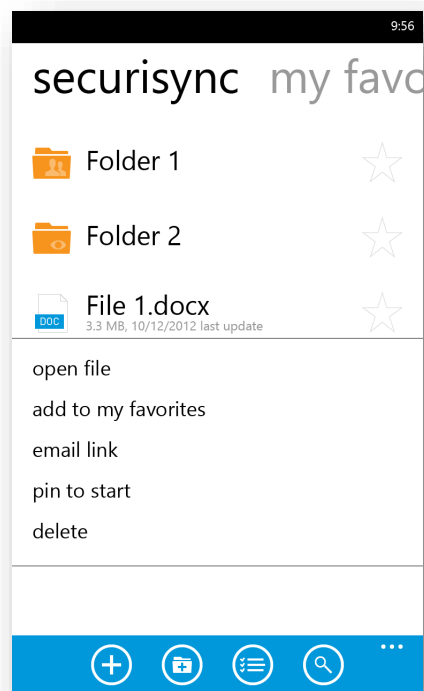
SecuriSync for the iPad
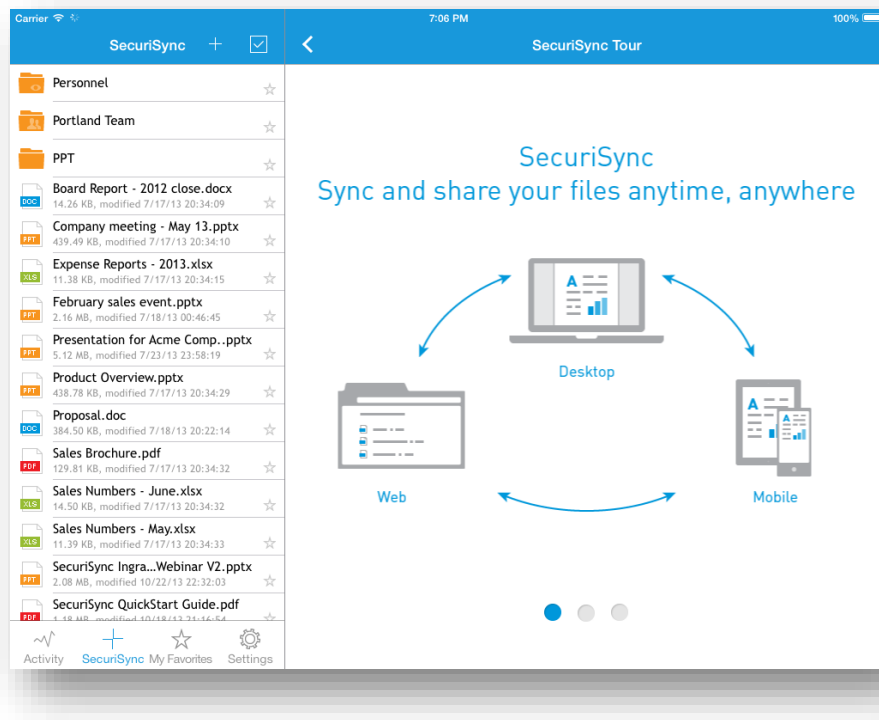
SecuriSync for Android

SecuriSync for BlackBerry

SecuriSync for Windows 8 Mobile
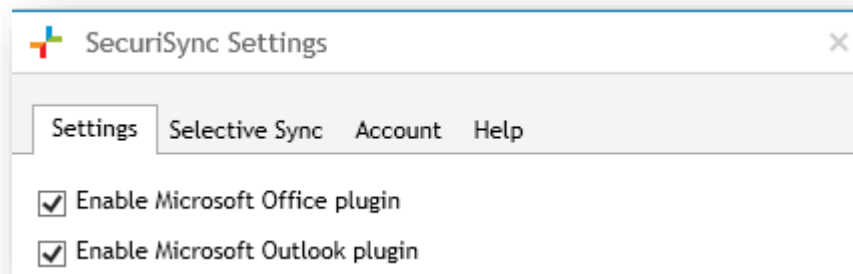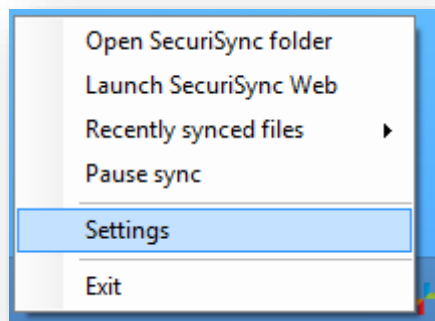
OFFICE AND OUTLOOK PLUGINS

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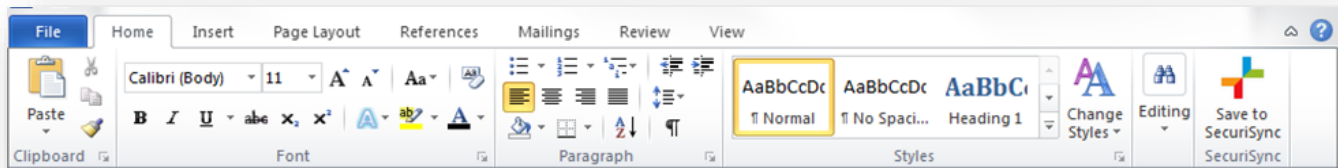
When working with files already located in SecuriSync, the plugin allows for easy access to SecuriSync functions from directly in the file. You can "Show Pane" from the ribbon to access the following capabilities:

- View the SecuriSync location. You can copy this file location to share via email with collaborators
- 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
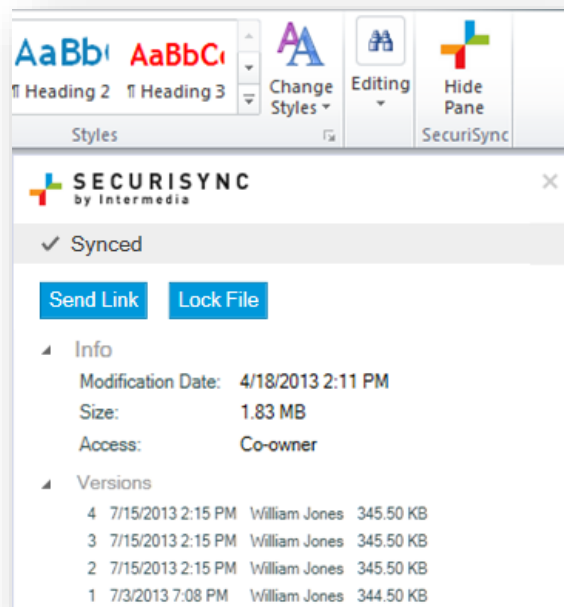
MICROSOFT OUTLOOK PLUGIN

The Microsoft Outlook plugin will allow you to easily replace email attachments with web links that open files using SecuriSync. 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.
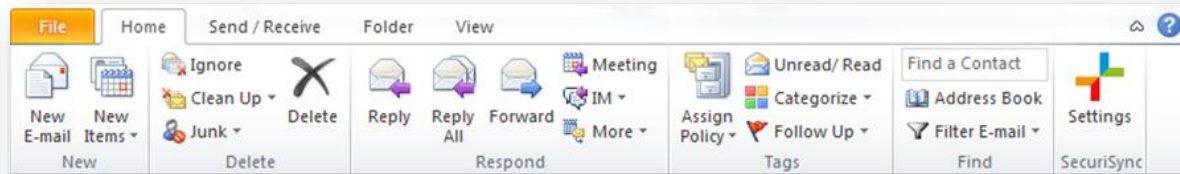
From settings you can set the following options:

- 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
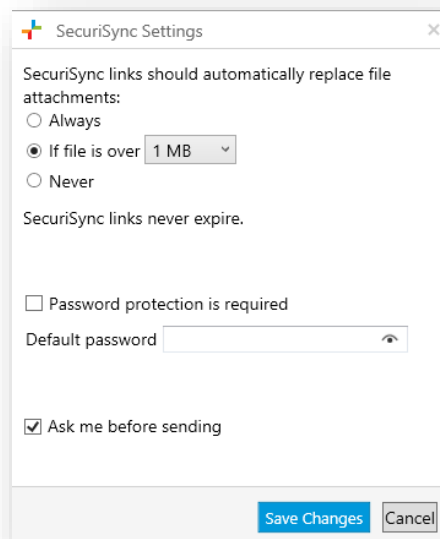
You can continue to use the standard Outlook Attach File button to attach files. SecuriSync will only replace files with links if attachment policy requirements are met.

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