



## PRIVATE CLOUD QUICKCARD

### HOW TO START

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#### Login

Go to [cloud.staplesconstruction.com](https://cloud.staplesconstruction.com). Enter your email address and your network password. Click "Log In". You'll see the Web user interface (UI) where you can upload, download, share, and collaborate on files.

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#### Download the Desktop Sync Folder

In the Web UI, you'll see a "Download Sync App" link at top right. Click it, and you'll see buttons for the different major platforms - Windows, iOS, Android, Mac. Click the button for the device you're on. Follow the instructions to install the local app & log in with your email/password. When prompted, choose the "Typical" install option. The Desktop App will allow you to copy or drag documents to a file folder on your desktop, which automatically syncs with your PlanetMagpie cloud.

For a visual introduction, view this Anchor Video Tutorial: <http://bit.ly/AnchorVideoTutorial>

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### DAY-TO-DAY USE

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#### Setup Folders

In the Web UI, click the "Create Folder" button. Type in a name, and hit Enter.

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#### Upload Files

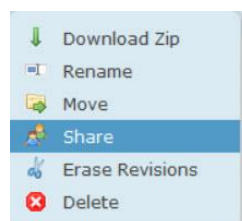
You can upload files via your Synced Folder, or from the Web UI.

-  Drag files or copy files into a folder in your Synced Folder, OR
  -  Upload via the Web UI: While logged in, click the "Upload Files" button. A new window will appear. Drag and drop the files into this window, or click "Add Files" and select them from your local machine. Click "Upload." When complete, click the "Back" button to return to the Files window.
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#### Share Files and Folders

You can share files with others in two ways: from your Synced Folder, or from the Web UI.

-  **Share from your Synced Folder**—Within the Synced Folder, right-click the file or folder you want to share. Go to "Sync" and click "Share Link". You may need to login at the Web UI.
-  **Share from the Web UI**—Within the Web UI, right-click the file or folder you want to share, and click "Share". See image at right.



The Share window will appear (see next page). You first have the option of selecting "Secure Share" or "Public Share URL".

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**Public Share** URL provides a URL you can copy & send to anyone. **Public Share links still require you to fill out the "Share With" section below. Do not use this option if files contain confidential data.**

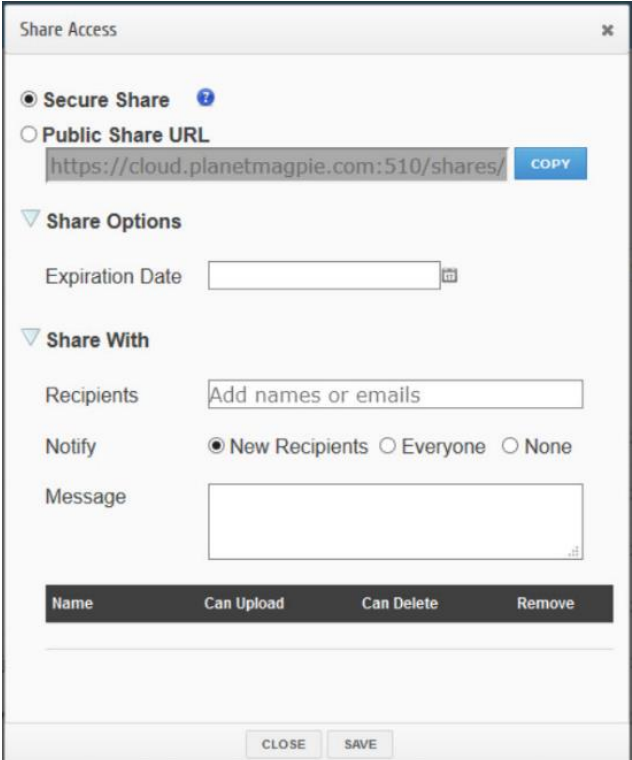
**Secure Share** encrypts the share. **When you use Secure Share, only the recipients you enter get access to the shared file/folder. We recommend Secure Share for all file sharing.**

SHARE OPTIONS: Optional. You'll find two fields under this heading.

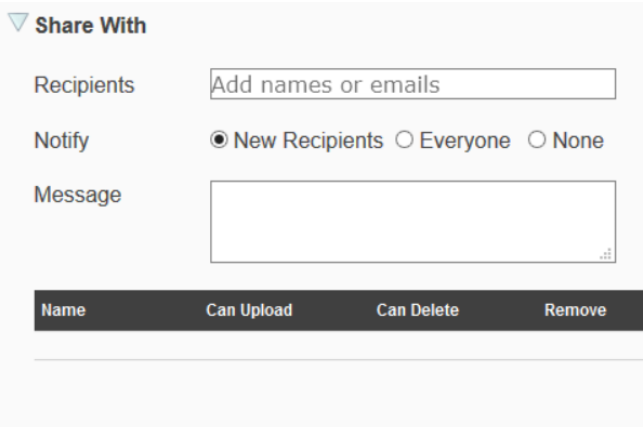
 **Expiration Date** – If you want the sharing link to expire after a certain period of time - let's say 1 week - enter an expiration date in this field. After this date, the user with whom you shared a file/folder can't access it anymore.

 **Download Limit** – If you want to limit the number of times users can download a file, enter a number in the Download Limit box. You can also check the "Notify on Download?" box if you want to receive notices every time the file is downloaded. (This option is not available when sharing folders.)

SHARE WITH: Required. You'll find four options under this heading.







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-  **Recipients** – Enter the names or email addresses of the people with whom you want to share the files/folders. They will appear in the Recipients window, below the Message field. (See “Recipients Window” below.)
-  **Notify** – Select from one of 3 options: ‘New Recipients,’ ‘Everyone’ and ‘None.’ ‘New Recipients’ will notify the new recipients you enter in the Recipients field that a file/folder is shared (the default). ‘Everyone’ will notify the new recipients, and any other users with whom this file/folder is shared. ‘None’ notifies no one of the share.
-  **Message** – (Optional) Enter a message for the share recipients. The message will appear in the notification email.
-  **Recipients Window** – The Recipients Window has four subheads: “Name,” “Can Upload,” “Can Delete” and “Remove.” When you enter a user in the Recipients box and hit Enter, they appear in the Recipients Window.

Can Upload & Can Delete: These options depend on what you’re sharing. If you share a **folder**, you’ll see checkboxes (see below). If you’re only sharing a **file**, the options display “Read Only”.

Name	Can Upload	Can Delete	Remove
Christine	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
(Chri			

Check the boxes if you want to allow the sharing recipient to make file changes (Can Upload) or delete files (Can Delete) from this folder.

**When you have the options & recipients you want set, click the Share button to share the file/folder.** If you click the Cancel button, Anchor will NOT share the file/folder with the recipient(s).


NOTE: If you share a folder with someone else, they can see all subfolders within that folder as well. If you select the “Can Upload” and/or “Can Delete” checkboxes, they can edit/delete any files within subfolders as well.

Recipients of shared links should consult the following section to locate the files.

### Locate Files/Folders Others Have Shared with You


When you click a shared link, it will take you to the Anchor Web UI login screen. Enter your username & password.

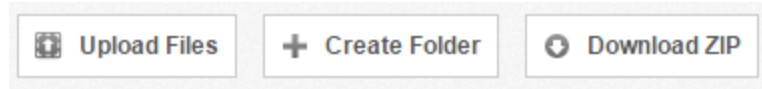
Once you login, you’ll see your Shares page. Click the file or folder name you want.

-  If the sender used Public Share: You’ll see options to Preview, Download or Copy URL. Click Preview to view the file. Click Download to download a local copy.



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 If the sender shared files via Secure Share: You'll see a file list, with three buttons above the folder's contents (see below).

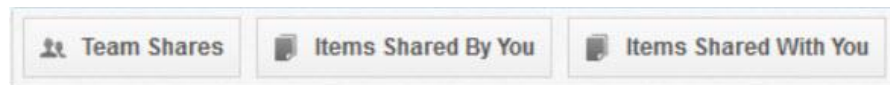


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Click any of the files in the folder to open it. Right-click to download. To add files in the shared folder, click the Upload Files button.

### To view shared files later (without the notification email):

Once a file/folder is shared with you, you can come back to it at any time. From the Anchor Web UI, click the Shares tab in the top right nav. You'll see a toolbar with three buttons.



"Team Shares" are shown by default (see the next section for more).

"Items Shared By You" lists the files/folders you've shared with others in the past.

"Items Shared With You" lists the files/folders others have shared with you. **This is where you'll always find shared files.**

### Team Shares

Team Shares are shared folders to which multiple people in your company have access (set by the administrator).


If you want to share files in a Team Share folder with someone outside the organization, follow the same steps as above to share regular files. (You will also need a Guest Account, as described below.)


Please be aware that they can see all subfolders within a Team Share if you share the folder.

### Sharing With Non-Anchor "Outside"

#### Users: Guest Accounts

If you want to share files & folders with someone outside your organization (an "external user"), you must grant them a Guest Account first. There are two ways to do this:

 **Create a Guest Account within the Anchor Web UI.** Under the Guests tab in the Web UI, click the "Create Guest" button. Enter the outside user's name, email address, and a password (or check the "Auto-Generate" box to create one for you). Click "Save." The user will receive an email prompting them to log in.

 **Share a file or folder to the external user's email.** Follow the steps for Sharing Files/Folders above. Enter the external user's email address in the "Recipients" field. Make sure you select 'New Recipients' in the "Notify" row. Anchor will automatically



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create a Guest Account for this email, and send the external user a message with login details.

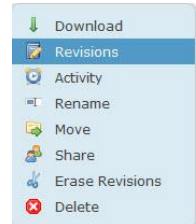
You will only have to do this once. Once the Guest Account is created, you can share files & folders with their email address, like you would a normal user.

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### Revisions

Older versions of files are kept in storage for 30 days. You can see a list of these previous versions by right-clicking a file name in the Web UI and clicking "Revisions." (See option highlighted at right.) If you've accidentally saved over a file or aren't able to access it, restore a previous version of the file by clicking "Restore Revision" link to the right of the version you want.



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### File Locking

NOTE: File Locking is not enabled for customers by default. If you want this option, please request it from PlanetMagpie Support at [support@planetmagpie.com](mailto:support@planetmagpie.com).

To lock a file for editing (prevent others making changes while you work), right-click the file in either the Synced Folder or on the Web UI. Click the "Lock" option. A padlock will appear on the file icon. When you're done editing, save the file. Then right-click it and click "Unlock".

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### Backups




Workstation backups are an available option to Anchor users as well. Anchor can make real-time backups of files outside the SyncedFolder. These backups are set & administered by Anchor Administrators.

If you're interested in adding backups, please request them from your PlanetMagpie Support contact. Include the folders you'd like backed up (default is your User Account folder, which contains "Desktop," "Documents," and "Pictures").

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### Things to Watch Out For

The following can cause sync errors within Anchor. Sync errors block files syncing back to the Anchor server, and can prevent file sharing.

-  Adding a space after a filename or its extension (e.g., ".docx\_")
-  Adding a space after a folder name (e.g., "Test Folder\_")
-  Opening a file on more than 2 computers (see "File Locking" above to prevent this)

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### Support

If you have issues with your Anchor Private Cloud and require support, please follow your internal help desk protocol. If you are directed to PlanetMagpie support, we can be reached at 510-344-1203 or [cloud@planetmagpie.com](mailto:cloud@planetmagpie.com).

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