

# 365OMNIDRIVE END USER GUIDE



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# GETTING STARTED

365OmniDrive allows you to share files and folders across your devices and collaborate with others.

365OmniDrive is available as a web portal, mobile App, and desktop client.

Using 365OmniDrive, you can:

- Collaborate with internal and external people in your organization.
- Manage file revisions and versions.
- Audit and track your files.
- Share files and folders through email with the Outlook add-in (for further information on the Outlook add-in read the 365OmniDrive Outlook Add-In user guide).

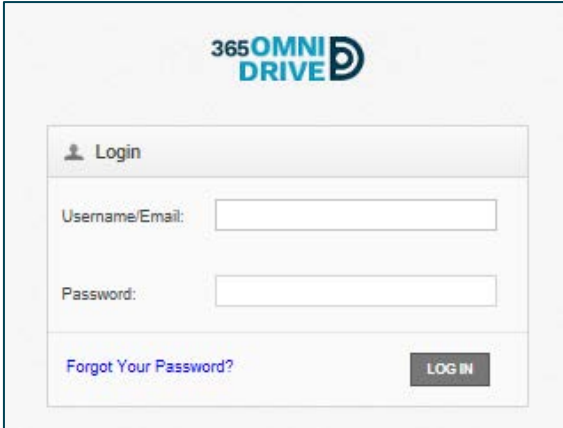
This user guide helps you set-up and use 365OmniDrive and provides you with the information you need to incorporate it into your daily work activities.

For additional resources, including training videos and user guides, visit [www.365tech.ca/365omnidrive](http://www.365tech.ca/365omnidrive)

## How to Log in to the Web Portal

When your administrator creates your user account, you'll receive a "welcome email," providing you with important information to help you start using 365OmniDrive. For example: your email may include a link to the web portal, a username (or an email address), and a password.

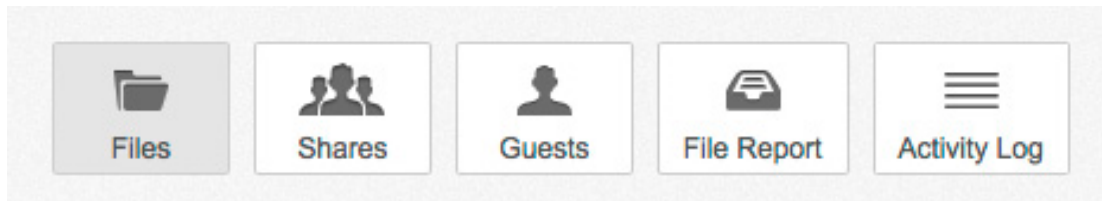
1. Navigate to [www.365omnidrive.ca](http://www.365omnidrive.ca)
2. Enter your username (or email) and password. For most 365 clients, this password is the same as your login password for your computer.
3. Click the "**LOG IN**" button. You now have access to 365OmniDrive.

The image shows a screenshot of the 365OmniDrive web portal login interface. At the top, the logo "365OMNI DRIVE" is displayed in blue and black. Below the logo is a "Login" section with a header "Login" and a user icon. There are two input fields: "Username/Email:" and "Password:". Below the "Password:" field is a link that says "Forgot Your Password?". To the right of the "Forgot Your Password?" link is a dark grey button with the text "LOG IN" in white capital letters.

# THE WEB PORTAL

Now that you have an account, you can create and upload content into the web portal. The web portal provides user-friendly features, including drag and drop, multi-select options, and the ability to view dozens of file types.

In the web portal, you can access your personal dashboard, search for files and folders, and manage your personal and shared content.



You can click the following menu tabs to:

- **Files:** Access your files and folders or create new files and folders.
- **Shares:** Access team shares, items shared by you, and items shared with you.
- **Guests:** Collaborate and share with people outside of your organization.
- **File Report:** View or export a list of your files.
- **Activity Log:** Review your activity within the system.

## How to Upload Files in the Web Portal

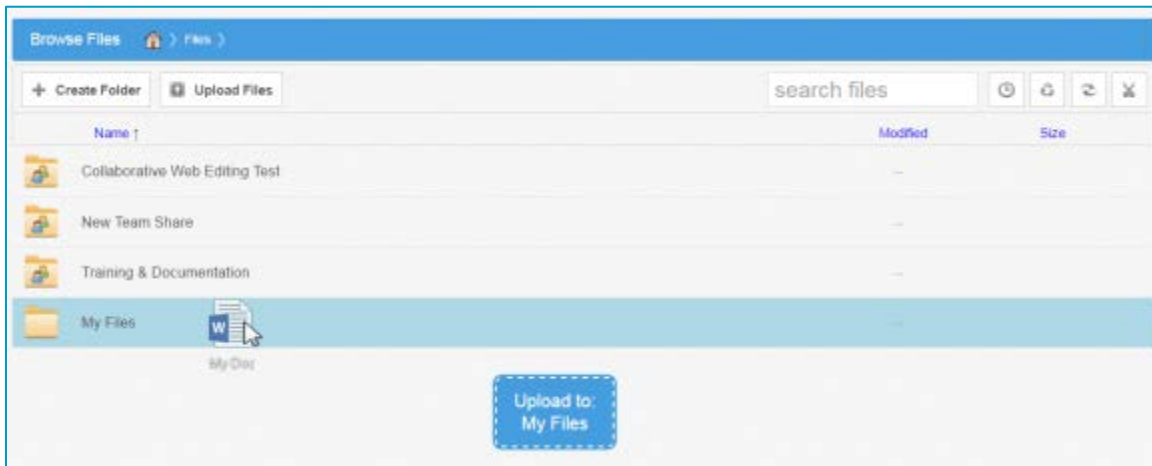
When you upload files and folders to the web portal, they will propagate (copy) to your connected devices (mobile devices or computer). You can access your uploaded content from any computer that has a supported web browser and an internet connection.

**IMPORTANT NOTE:** Your organization may exclude certain file extensions, which you cannot upload to 365OmniDrive (See “A Note About Excluded Extensions” in this user guide).

It's also important to ensure that any of your connected devices have sufficient hard drive capacity for your uploads (uploads automatically sync with your connected devices).

Follow these steps to upload files to the web portal:

1. In the web portal, click the **“Files”** tab. The “Browse Files” page will open.

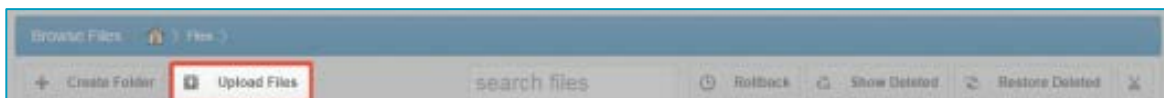


2. To upload files:

- a. Navigate to the appropriate location, and then drag and drop files and folders onto the page, or into a personal folder or Team Share. **NOTE:** Uploaded folders will retain their original structure.



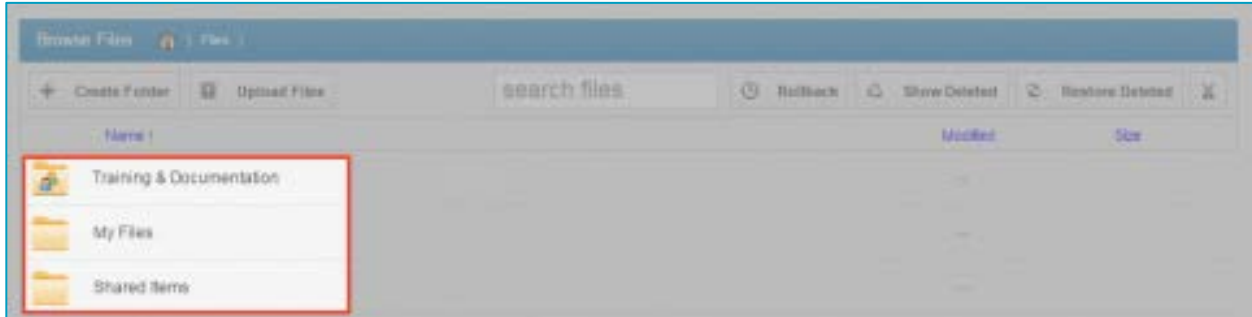
- b. Select the folder you want to upload files into and click the **“Upload Files”** button. The “Upload Files” page appears. You can either:
  - Drag and drop files onto the page and click the **“Start Upload”** button.
  - Click the **“Add Files”** button and choose files from your computer that you want to upload and click the **“Start Upload”** button.



3. An **“Upload Files”** pop-up window appears, showing you the status up the uploading process.

## How to Create and Manage Files and Folders in the Web Portal

You can create and manage your files and folders in the web portal's "Browse Files" page, including advanced drag and drop functionality, creating folders, uploading files, and managing revisions. You can also preview dozens of file types directly in your web browser and edit files simultaneously with co-authors using the [Collaborative Web Editor](#).

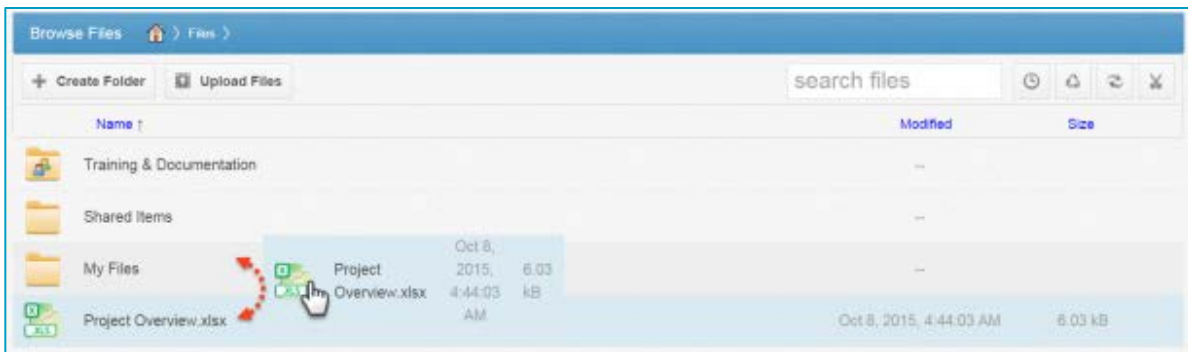


### Finding Content (Browse Files)

1. In the web portal, click the **"Files"** tab to open the "Browse Files" page.
2. You'll see a list of your files, folders, and Team Shares. To quickly organize your content, drag and drop files and folders within the "Browse Files" page.

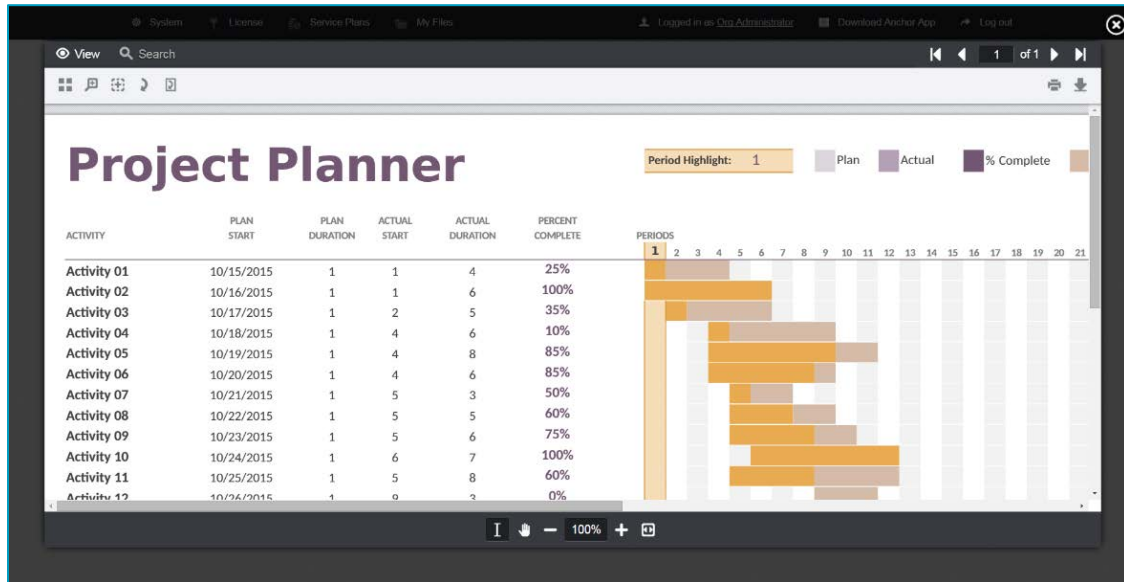
#### NOTE:

- You cannot drag and drop a personal file or folder from outside of a Team Share. However, you can drag and drop personal files and folders from inside Team Shares.
- You can select multiple files at once by holding down the **"shift key"** on your keyboard to perform mass actions, including download, lock, move, and delete.



## Previewing Content in Your Web Browser

1. To preview a file in your web browser, right-click the file and select **“View”** or click the file to open and view its contents. The selected file will open, allowing you to search, select and copy text, print, download, and more.
2. Click the **“Close”** button when done previewing.

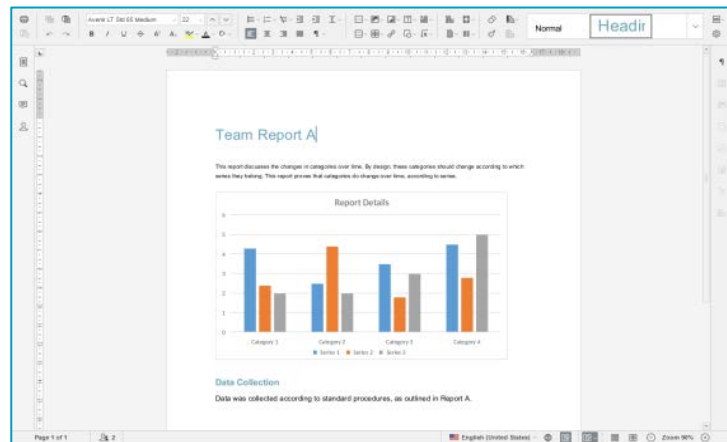
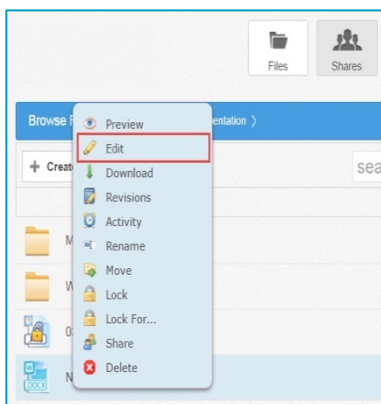


## Editing Content in Your Web Browser

1. Right-click on a file and select **“Edit”** to open the real-time **Collaborative Web Editor**.

There are a wide-range of formatting tools to edit your documents, including fonts, paragraph formatting, charts, tables, and images. Additionally, you can edit simultaneously with co-authors, send and receive chats, and view and manage comments.

**IMPORTANT NOTE:** There is no **“save button”** in the web editor. The web editor auto saves your changes to the document. Simply click **“Return to My Files”** (top right) when you complete your editing.





## A Note About Excluded Extensions

While most of your files and folders easily sync across all your connected devices, certain system files and folders, and temporary application files, will not sync. Your administrator may have excluded other file extension types (such as application or video files) from the syncing process.

If you upload a file with an excluded extension through the web portal, you'll receive a notification that the file is on the exclusion list. This file will not appear in the web portal or your connected devices.



## Live Databases (Not Supported)

The system does not support live database file syncing, including Microsoft Access databases, QuickBooks files, and .pst files. Attempting to sync a live database file may result in errors and collisions (a syncing issue).

# MOBILE APPS

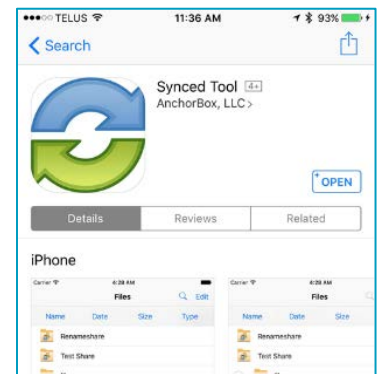
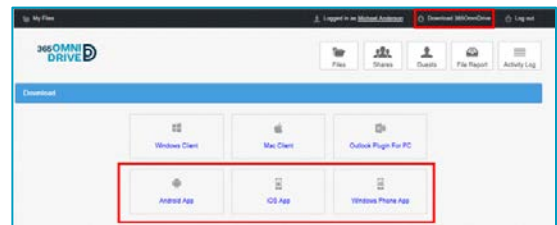
In addition to using the web portal or desktop client on your computer (local machine), you can manage files and folders from your mobile device using the app. Mobile app versions include Android, iOS, and Windows Phone.

## How to Download 365OmniDrive's Mobile App – Synced Tool

Locate the “Synced Tool” app on your mobile device in the appropriate App Store (iTunes, Google Play, Windows). Alternatively, you can access a direct link to your device's app in the web portal.

To find your device's app:

1. Login to 365OmniDrive using your mobile device's web browser.
2. In the web portal, click the “**Download 365OmniDrive.**”
3. Select the appropriate app for your device (Android App, iOS App, or Windows Phone App).
4. The “Download” page will open for you to install the app on your device.



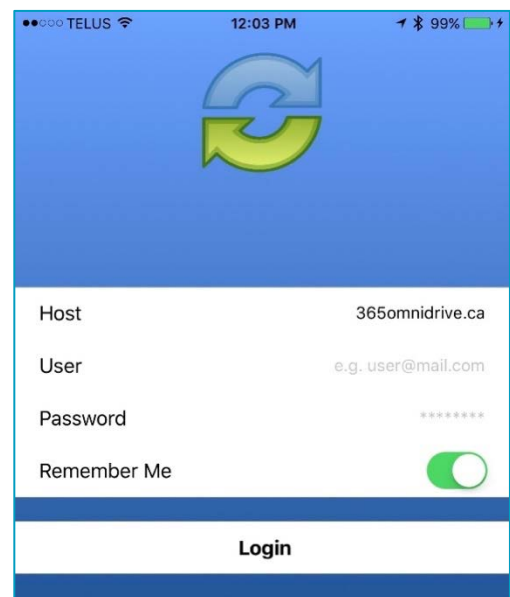
## Logging in to Your Mobile App

Press the “**Synced Tool**” app on your device to launch 365OmniDrive. The login screen opens and prompts you to enter your credentials. In the:

1. **Host field** enter 365omnidrive.ca
2. **User field** enter your username (for example, user@mail.com).
3. **Password field** enter your password

**NOTE:** This is the same username and password to log in to 365OmniDrive.ca web portal.

To download user guides for 365OmniDrive's mobile apps (iOS, Android, and Windows Phones), visit [www.365tech.ca/365omnidrive.ca](http://www.365tech.ca/365omnidrive.ca).



# 365OMNIDRIVE DESKTOP CLIENT

In addition to using the web portal and mobile apps, you can also manage files and folders from your computer (local machine) using the desktop client.

The desktop client includes 365OmniDrive, which stores your files and folders on your computer. Files and folders added to the 365OmniDrive desktop client automatically sync to the web portal and connected devices.

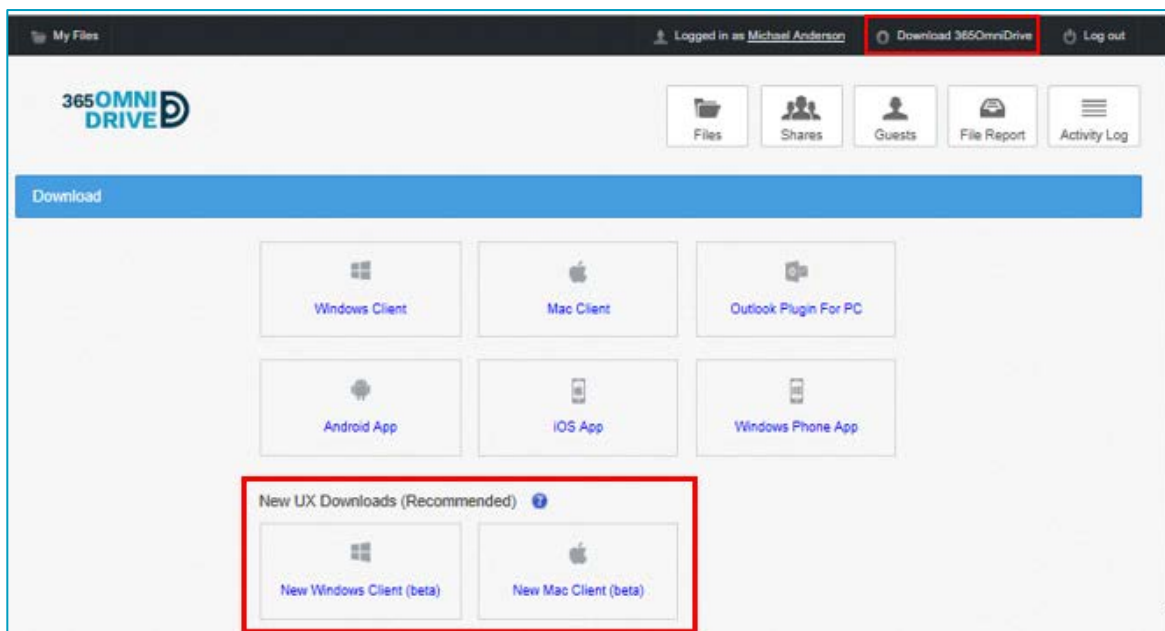
The 365OmniDrive desktop client is available for Window and Mac machines.

## How to Download the Desktop Client

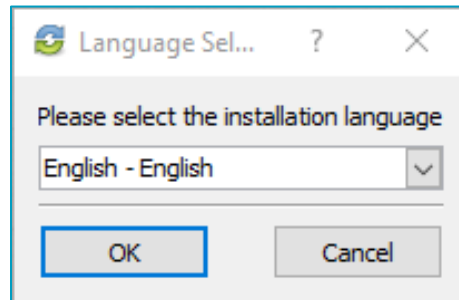
When you download and install the desktop client, you can access your files and folders directly on your computer.

To download the desktop client on a Windows or Mac machine from the 365OmniDrive web portal:

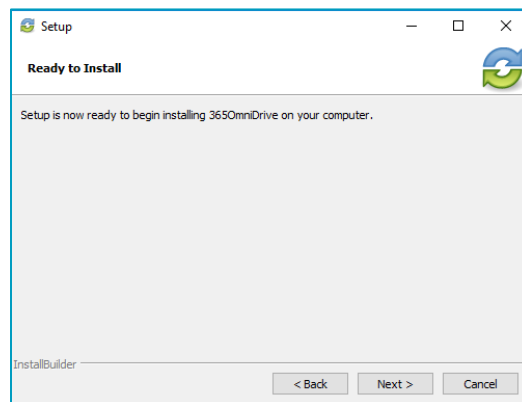
1. Click **“Download 365OmniDrive”** in the top navigation menu.
2. Under **“New UX Downloads (Recommended),”** click the appropriate icon for your computer (Windows or Mac) and download the installation file when prompted.



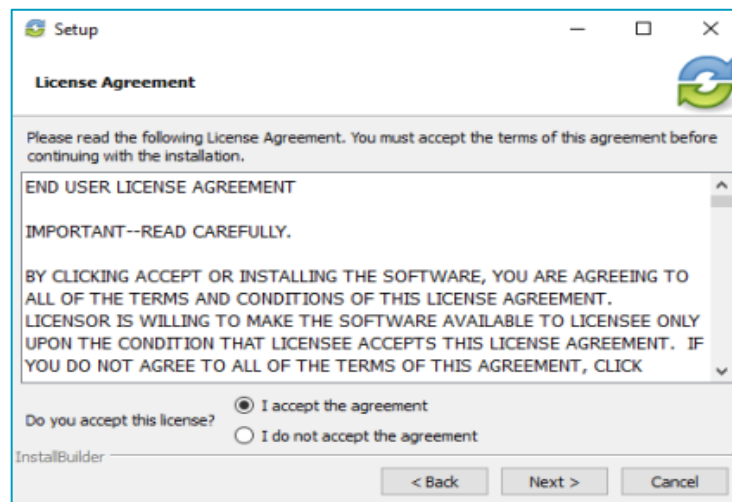
3. Select your language and click the **“OK”** button to continue.



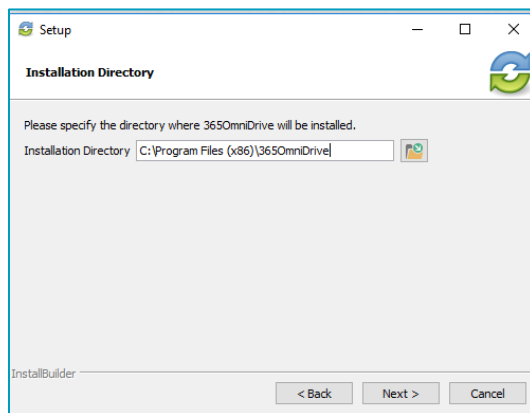
4. Click the **“Next”** button to start the **Setup Wizard**.



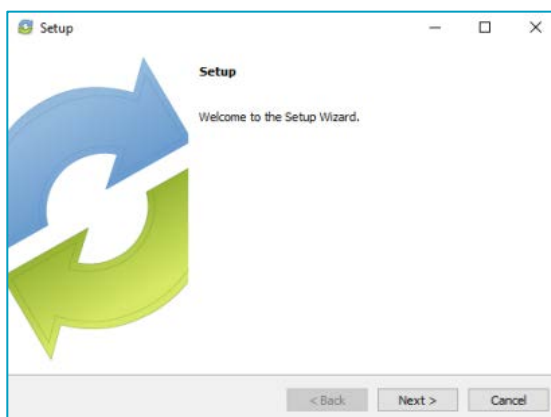
5. In the License Agreement screen, select **“I accept the agreement”** button to accept the license, and select the **“Next”** button to continue.



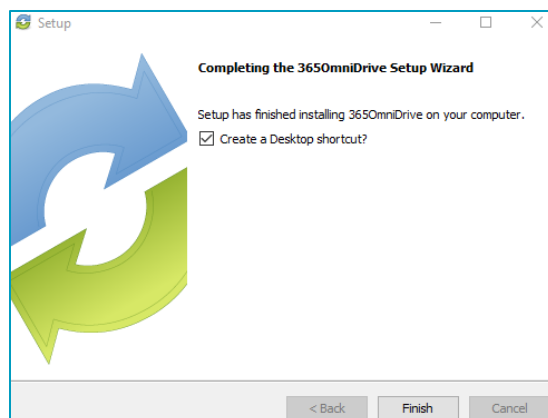
6. When the file finishes downloading, select the directory where you want to install 365OmniDrive (in most instances select the default location). Alternatively, you can manually input a new directory or click the **“Folder”** icon to select a new directory on your computer. Click the **“Next”** button to continue.



7. In the Setup screen click the **“Next”** button to install 365OmniDrive.



8. When completed, you can optionally click the **“Create a Desktop Shortcut,”** and click the **“Finish”** button.



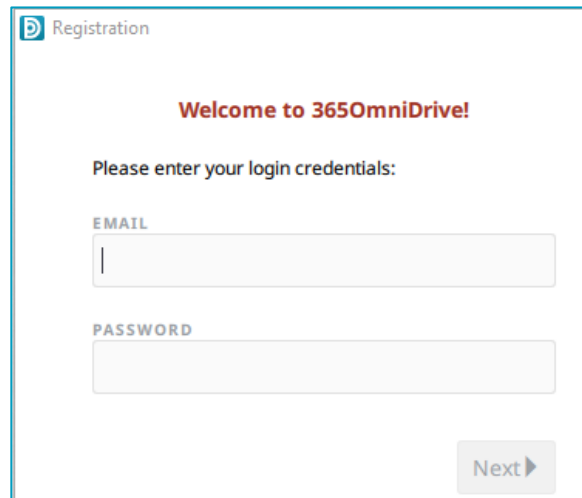
## How to Register the Desktop Client

After installing the desktop client, you **MUST** register your user account, so that the system recognizes files and folders that belong to you. To register the desktop client on a Windows or Mac machine:

1. After the **Setup Wizard** completes, the **Registration Wizard** launches automatically. Alternatively, you can click the icon on your computer's system tray or menu bar and select **"Register."**

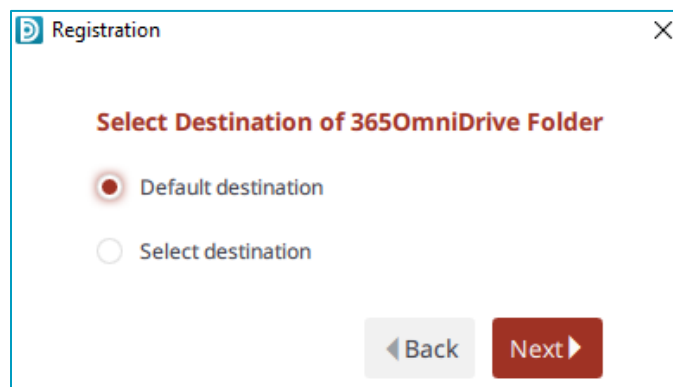
**NOTE:** On a Windows machine, you can find the icon in the lower right-hand corner and on a Mac in the upper right-hand corner of the screen.

2. In the Registration screen, enter your login credentials provided by your administrator, and click the **"Next"** button to continue.

A screenshot of the 'Registration' window. The title bar says 'Registration'. The main text reads 'Welcome to 365OmniDrive!' in red. Below that, it says 'Please enter your login credentials:'. There are two input fields: 'EMAIL' and 'PASSWORD'. A 'Next' button with a right arrow is at the bottom right.

3. Select the location of your 365OmniDrive folder. You have two options: default or select destination.

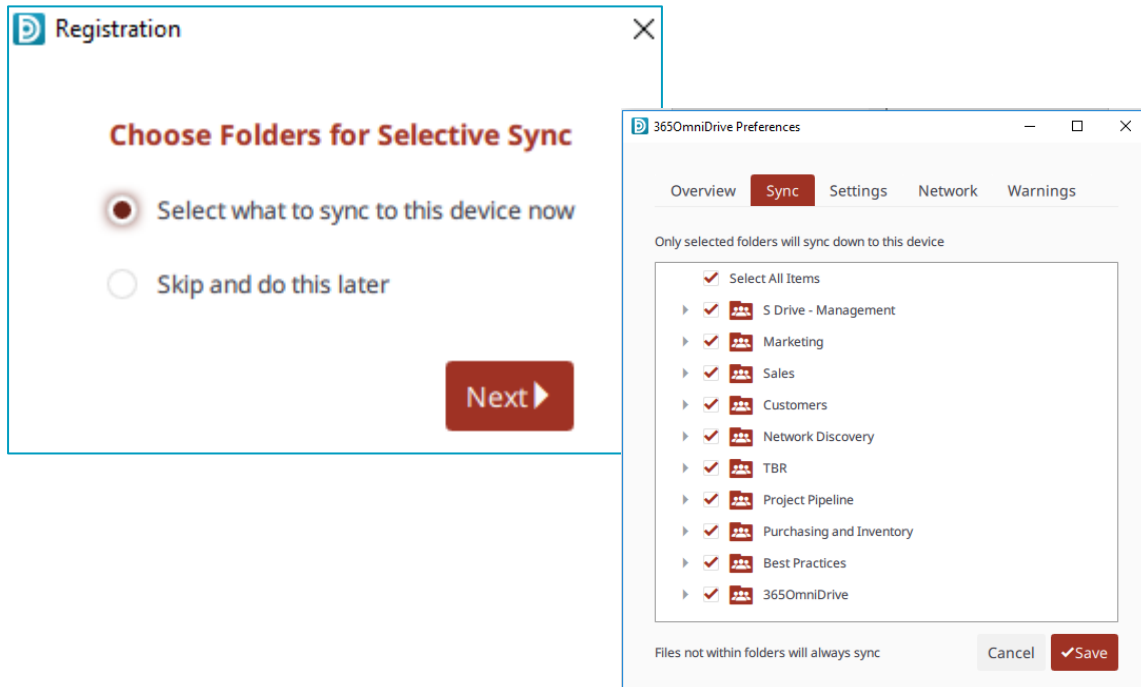
If you choose **"Select Destination,"** the system will prompt you to choose your folder location. Click the **"Browse"** button to select the location on your computer and then click the **"Next"** button.

A screenshot of the 'Registration' window. The title bar says 'Registration'. The main text reads 'Select Destination of 365OmniDrive Folder' in red. There are two radio button options: 'Default destination' (which is selected) and 'Select destination'. At the bottom, there are 'Back' and 'Next' buttons. The 'Next' button is red and has a right arrow.

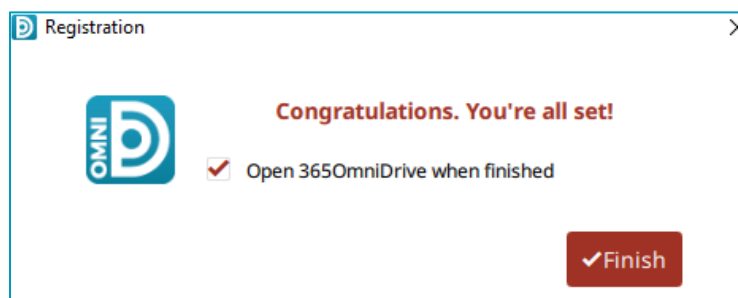
**NOTE:** The system creates a 365OmniDrive folder in the location you select. You do not need to manually create a folder titled 365OmniDrive.

4. In the “Selective Sync” screen, you can either click:

- **“Select what to sync to this device now”**: The default selects all folders. You’ll need to deselect content you do not want shared on your computer and click the **“Save”** button.  
**NOTE:** You can change these settings at any time.
- **“Skip and do this later”**: This allows you to sync Team Shares and personal content located in the cloud at another time.



5. Click the **“Finish”** button to complete registration.

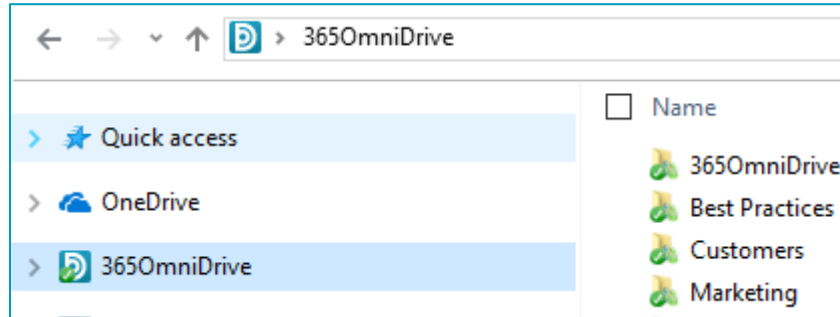


## How to Upload Files in the Desktop Client

When you add files and folders to the web portal, they automatically sync to your computer. In the same way, files and folders added to your 365OmniDrive desktop client will automatically sync to the web portal and any other devices connected to your account. You can use the desktop client on Windows and Mac machines.

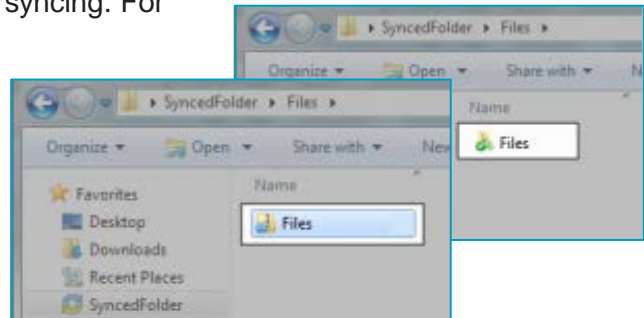
To upload files in the desktop client on a Windows or Mac machine:

1. On your computer, select “**365OmniDrive.**”



2. Drag files or folders into 365OmniDrive or save files to 365OmniDrive directly from the application in which you are working (Microsoft Word, Excel, Adobe).
3. Use the icons to understand when your files are syncing. For example:

- **Blue rotating icon** indicates a file or folder is syncing.
- **Green checkmark icon** indicates the file or folder has successfully synced, and you can access it in the web portal and any other connected devices.

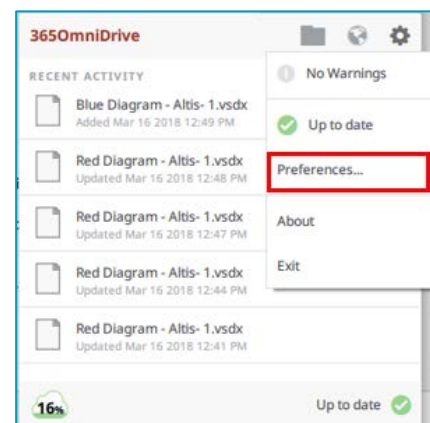


## How to Manage Preferences for the Desktop Client

Using the icon on your computer's system tray, you can manage preferences, pause syncing, and view warning messages.

### Managing Preferences

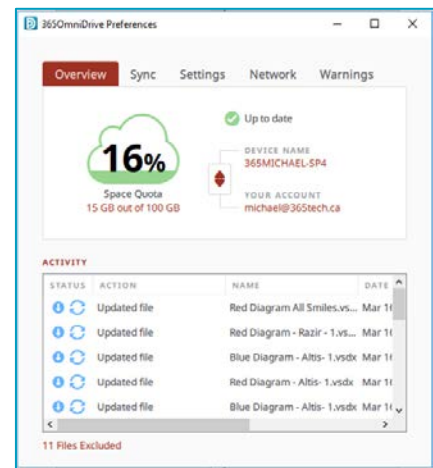
To manage preferences or change your settings click the **365OmniDrive system tray icon**, select “**Manage,**” and then select “**Preferences.**” The Preferences dialog box opens, showing the “Overview” tab.





1. Use the “Overview” tab to view important information and status updates, including the:

- Current syncing process state (whether the files are up to date, pending, or syncing)
- The total amount of space available and used.
- The device name and the device account information.
- The “Unregister” button unregisters (no longer syncing) the desktop client.
- The “Activity” area lists the status of uploaded and downloaded files and a notification of excluded files.

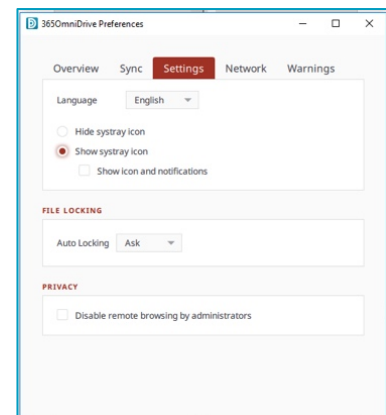
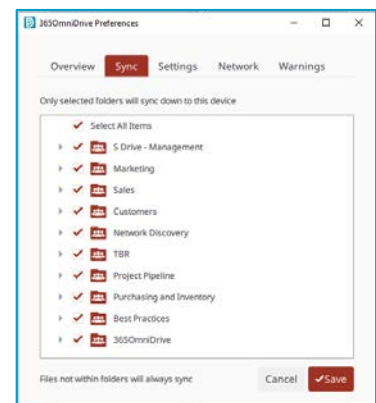


2. Click the “Sync” tab to select and deselect the Team Shares, personal folders, and subfolders that you want to exclude from your computer.

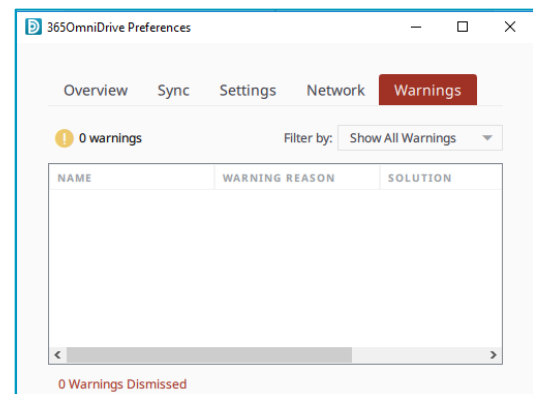
Deselected folders are still available through the web portal. This feature allows you to conserve local storage space and bandwidth.

3. Click the “Settings” tab to specify language, locking, and remote browsing settings. For example, the:

- **Language Dropdown Menu** allows you to select your preferred language. You can also choose to show or hide desktop notifications.
- **File Locking Dropdown Menu** allows you to set your auto-locking preference. If your administrator has turned on auto locking for Team Share Word and Excel documents, you can decide to automatically lock, never lock, or receive a prompt each time you open a Word or Excel file in a Team Share.
- **Privacy Section** allows you to click the “Disable Remote Browsing” checkbox to prevent administrators from remotely browsing the contents of your 365OmniDrive (for example, to create a backup of your local folders).



4. Click the **Warnings** tab to view a file sync warning list.



## Pausing a Sync Process

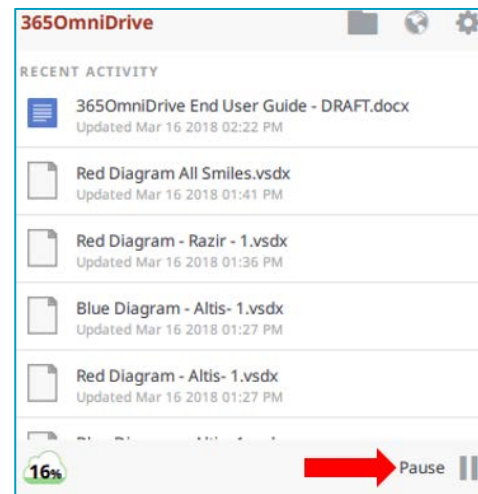
There are times when you would like to pause the sync process, such as when you are getting on a plane, conserving bandwidth, or working in isolation.

To pause a sync process:

1. Click the system tray icon and hover over the “Status” message (for example, Up to date).

**NOTE:** The system tray icon on a Windows machine is in the lower right-hand corner, and on a Mac machine in the upper right-hand corner of the screen.

2. When the text changes, click the “**Pause**” button.
3. To resume the sync process, hover over **Pause** and select “**Resume**.”

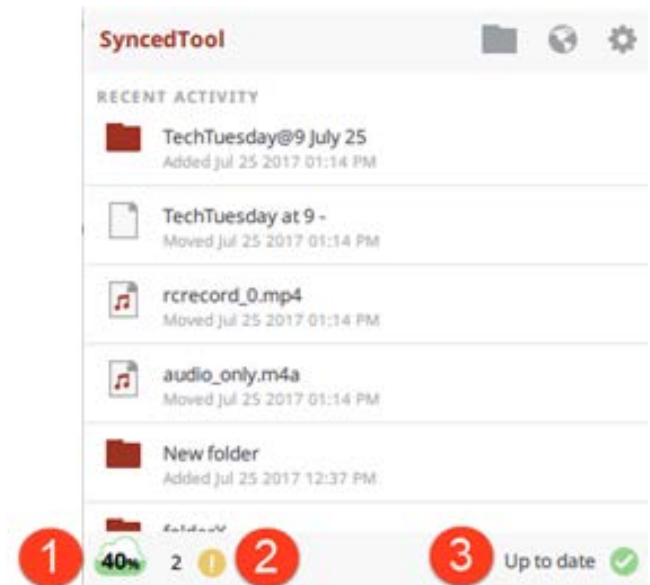


## Viewing Warning Messages

In addition to managing preferences and pausing synching, you can view the desktop client warning messages and resolve issues directly from the system tray icon.

Click the icon on your computer’s system tray or menu bar, and the SyncedTool screen opens, allowing you to view and manage warning messages.

- 1 The **Space Quota** indicator message shows the amount of space you are using.
- 2 The **Resolve Sync Warnings** indicator activates when a file sync warning (such as a collision or locked change warning) occurs on your computer. When this indicator is active, click to resolve the file sync warning. For more information, please reference the “How to Resolve File Sync Warnings” section of this user guide.
- 3 The **Status** indicator displays the progress of the sync process. This indicator alerts you when the sync process is up to date, syncing, paused, or disconnected. You can also hover over this indicator to enable pause and resume functionality.



# SHARING AND COLLABORATING

You can collaborate and share files in many ways:

- **Team Share** is a shared folder that groups of users can access. You can configure Team Shares for users within your organization. When you work within Team Shares, it is important to be careful and courteous when editing, deleting and moving files and folders. All subscribers share files and folders stored within Team Shares, so what you do affects your team members.
- **Share Link** allows you to share a direct link to a file or folder rather than allowing access to an entire area. You can configure share links for internal and external users. You can send a:
  - **Public share** to recipients inside or outside of your organization.
  - **Secure share** to recipients inside or outside of your organization. However, this requires login credentials. If you send a secure share to an external recipient, the system will create a guest account for that user.

With Team Shares and Share Links, you can share files and folders in the web portal, desktop client, or mobile devices. Additionally, with the real-time **Collaborative Web Editor**, you can edit documents, spreadsheets, and presentations while working in the web portal without needing to download a separate document or navigate away from the system.

## How to Create a New Team Share

Your administrator may have configured Team Shares for you when integrating 365OmniDrive into your organization. However, you can also create your own Team Shares to collaborate with another person or group on a specific set of content. You can add files to Team Share the same way you add files to standard folders. When you or a collaborating user adds or edits a file or folder in Team Shares the system synchronizes across all subscribed accounts.

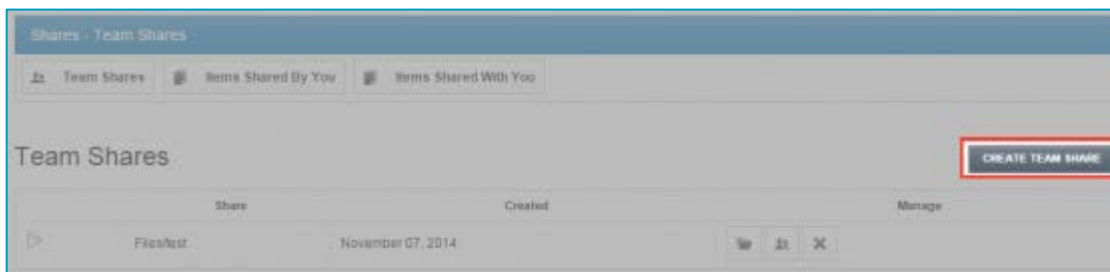
You might find it useful to follow certain best practices to ensure you protect and effectively manage your shared content, including:

- **Locking files and folders before you make changes:** When you lock a file and folder, you are setting it as read only for other users, giving you exclusive editing rights while you make changes. For more information, please reference the “Locking Files and Folders” section of this user guide.
- **Monitoring activity using the File Report, Activity Log, and Daily Email Digest:** To see a summary of changes made to files and folders within a specific Team Share, you can optionally track and monitor activity in the web portal using the **File Report** and the **Activity Log**. For more information, please reference the “File Report and Activity Log” section of this user guide.

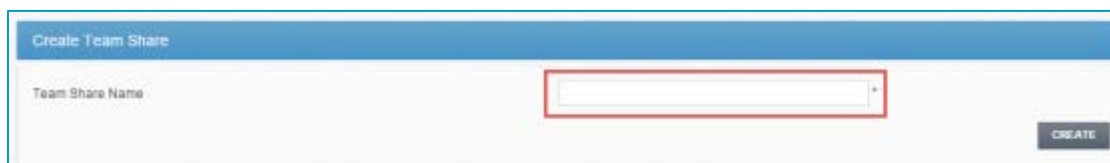
**NOTE:** To create a **Daily Email Digest** that summarizes activity for a Team Share, please reference the “Locking Files and Folders” section of this user guide.

To create a new Team Share in the web portal:

1. Click the “Shares” tab, and the “Team Shares” page will open.
2. Click the **“Create Team Share”** button, and the “Create Team Share” page opens.



3. Type a descriptive name for the Team Share in the **“Team Share Name”** field.



4. Click the **“Create”** button, and the “Team Share Subscribers” page will open.
5. Select a user name from the dropdown list and click the **“Add to Share”** button. You’ve now added the user to your Team Share.

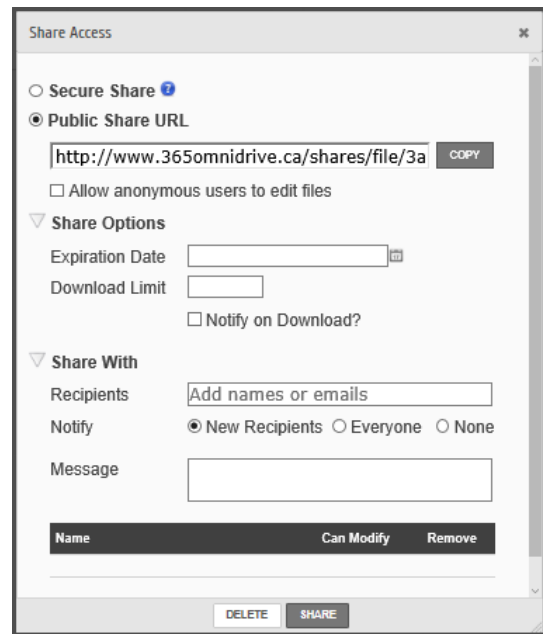
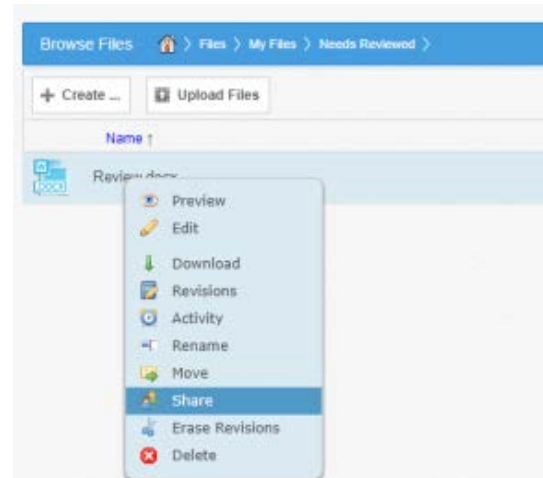


## How to Send Share Links to Files

You can create **Share Links to Files** from the web portal, desktop client, or a mobile device. To send a share link to a file:

1. In the web portal, right-click the file and select “**Share**,” or within the desktop client, right-click on the file, point to the 365OmniDrive menu, and select “**Share link**.”
2. The “Share Access” dialog box opens, allowing you to configure settings for sharing the link, including:
  - The **Secure Share** option, which requires each recipient to log in with his or her unique credentials.
  - The **Public Share** option, which allows you to send a file link to a recipient. You can also select the “**Allow Anonymous Users to Edit Files**” checkbox to allow users to edit the file online using the **Collaborative Web Editor**.
  - The **Share Options** settings allow you to:
    - Select whether a share link will expire after a certain date.
    - Set a limit for the total number of times a recipient can download the link.
    - Turn on email notifications when a recipient downloads a file share.
  - The **Share With** settings allow you to specify share recipients and set permissions for each user. You only require this section if you are sending a secure share link. Alternatively, for public share links, you can copy the share link and send it to desired collaborators through third-party communication tools.
  - The **Permissions** settings lets you set **Can Modify** permissions, which allows the specified user to edit the file using the **Collaborative Web Editor**.
3. Click the “**Share**” button to save your changes.
4. Click the “**Delete**” button to cancel your configurations and delete the share link.

**NOTE:** If you reopen and edit the share link, you will see a “**Cancel**” button, which closes the dialog box, but does not delete the share link.



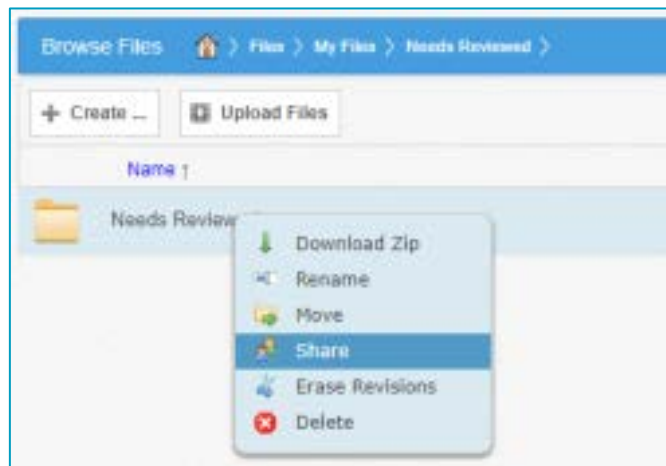
## How to Send Share Links to Folders

You can create **Share links to Folders** from the web portal, desktop client, or from a mobile device.

To send a share link to a folder in the web portal:

1. Right-click a folder and select “**Share,**” or in the desktop client, right-click the folder, point to the 365OmniDrive menu, and select “**Share link.**”
2. In the **Share Access** dialog box, configure the settings for sharing the link:
  - The **Secure Share** option requires a recipient to login with his or her unique credentials.
  - The **Public Share** option sends the recipient an available public share link. If you create a public share link, you can also select the “**Allow anonymous users to edit files**” checkbox to allow users to edit files within the folder using the **Collaborative Web Editor**.
  - The **Share Options** settings allows you to:
    - Select whether the share link will expire after a certain date.
    - Set a limit for the total number of time a recipient can download the link.
    - Turn on email notifications when a recipient downloads a file share.
  - The **Share With** settings allows you to specify share recipients and set permissions for each user. You require this section only if you are sending a secure share link. Alternatively, for public share links, you can optionally copy the share link and send it to desired collaborators through third-party communication tools.
  - The **Permissions** settings lets you set the following permissions:
    - **Modify:** allows the user to edit files within the folder using the **Collaborative Web Editor**. This also lets users upload files into the folder.
    - **Delete:** allows the user to delete files within the shared folder.
3. Click the “**Share**” button to save your changes.
4. A “Confirmation” page will open, you can click the “**Delete**” button to cancel your configurations and delete the share link.

**NOTE:** If you reopen and edit the share link, you will see a “**Cancel**” button, which closes the dialog box, but does not delete the share link.



## How to Manage Guest Accounts

Guests are special accounts created for **individuals outside of your organization**. You can manually create a guest account to give access to files and folders or give access to an entire folder, so that the guest can upload and manage content within the system.

Alternatively, if you send a secure share invitation to a person outside of your organization, you are automatically creating a guest account within the system. You can manage your guest accounts using the “Guests” tab inside the web portal. For example, you might want to remove guests who no longer need access to content that you shared.

Guest users can also manage their own user settings, including their name, email address, and password, and delete their own account. Guest accounts can:

- Access a shared file or folder through the web portal.
- Manage their account information and change their password.

Guest accounts **CANNOT**:

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

**BEST PRACTICE:** If you are collaborating with a guest account on a regular basis, you can share an entire folder with the guest account. When you create a secure share to a folder, you can invite a guest account and decide whether to give that guest account permission to upload or delete content from that shared folder. You can also choose to receive notifications when the guest user uploads or downloads content. In this way, the shared folder becomes a collaborative space where you can exchange and review content.

To manage guest accounts in the web portal:

1. Click the “Guests” tab. The “Guests” page opens listing your existing guests.
2. Use the following buttons in the “Guests” tab to manage guests:
  - **“Create Guest” button** allows you to manually add a new guest. You can configure the guest's name, email address, password, and decide when the password should expire.
  - **“Remove” button** allows you to delete an existing guest.



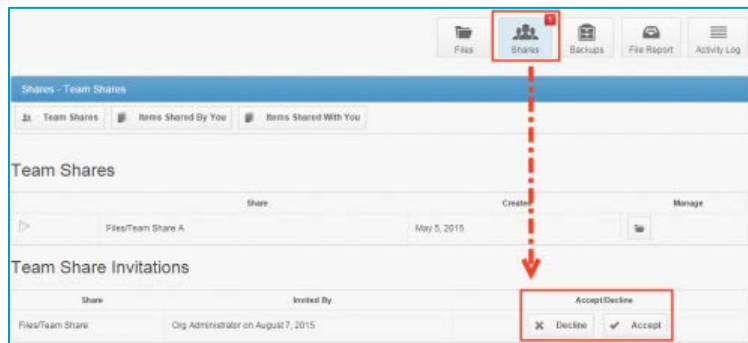


## How to Manage Shared Items

You might find it useful to keep track of items in Team Shares, and items you share with third parties. Using the “Shares” tab in the web portal, you can generate and view reports that allow you to manage these shared items. You can also remove a share link if required.

To track shared items in the web portal:

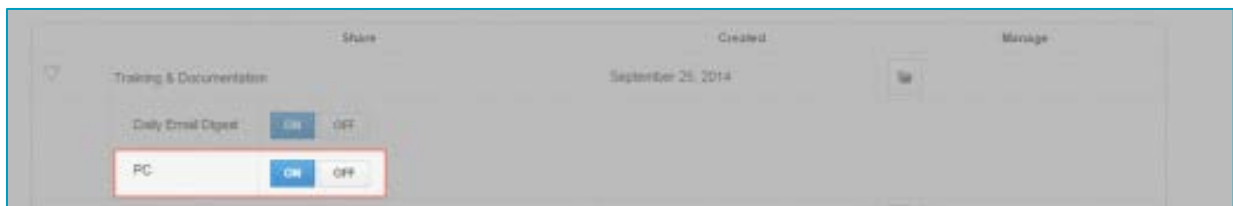
1. Click the “Shares” tab to manage your shares.



2. Click the **“Team Shares”** button to access controls allowing you to create, view and edit Team Shares, or click the **“arrow”** to expand a Team Share.



- Click the **“On”** button to receive a “Daily Digest” email for the selected Team Share. A “Daily Digest” email provides detailed information about events that occur within the Team Share. You will receive a daily email until you turn off the “Daily Digest” option.



- You can also turn “on or off” the Team Share content from syncing to a computer. This functionality is useful if a Team Share contains large files (such as video files) and you’d rather only access the content when necessary from the web. Click the **“Off”** button to turn off content syncing, or the **“On”** button to ensure content synchronizes to your computer.



3. Click the **“Items Shared By You”** button to track how many times an item you shared has been viewed, downloaded, and whether it is set to expire on a certain date.
  - You can also click the arrow to expand an item, which allows you to view detailed information about the user that received your shared item.
  - Click the **“Delete”** button to remove a share link.



4. Click the **“Items Shared With You”** button to view files that others within your organization shared with you, and information about who shared the file and what access rights you were given (read, write, and delete).



5. Finally, sometimes you may receive an invite to join a Team Share outside of your work organization. When this happens, you'll receive an alert through email and by a notification in the web portal's "Shares" tab. Use the "Shares" tab to accept or decline the invitation.

# LOCKING FILES AND FOLDERS

File locking allows users to place locks on files and folders in Team Shares. This feature is useful when you want to prevent other user accounts from editing your items when you are making changes. You can place locks on the Team Share, a Team Share subfolder, or a Team Share file.

When you lock an item, you'll see a lock icon placed over the file or folder making it read only for other users associated with the Team Share.

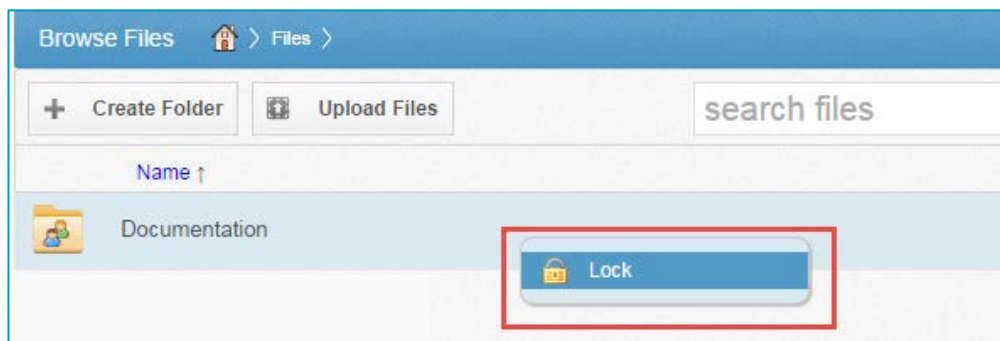
## IMPORTANT NOTE:

If you forget to lock a file or folder before making changes, you could encounter **file sync warnings**. A file sync warning might take the form of a **collision**, where two Team Share subscribers try to edit a file at the same time,

If you forget to unlock a file or folder, a **locked change warning** means a user is attempting to edit a locked file.

When a file sync warning occurs, the system notifies you of the conflict and helps you resolve the issue.

Your administrator can configure a Team Share to ensure Microsoft Word and Excel files automatically prompt you to "lock the files" when opened. When you lock the files, they will automatically unlock when you close the file.



## How to Lock Files and Folders in the Web Portal

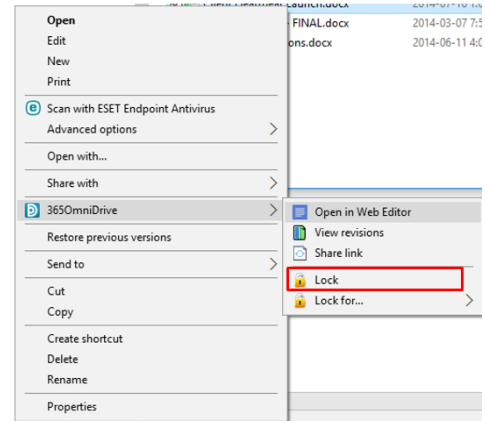
In the web portal, you can place locks on the Team Share, a Team Share subfolder, or a Team Share file. When you lock an item, you'll see a lock icon placed over the file or folder making it read only for other users associated with the Team Share.

To place a lock on a file or folder in the web portal:

1. Right-click the item and select **“lock.”** You've now locked the item, and it's read only for other Team Share users.

You can also lock the file or folder for a specific amount of time by selecting **“Lock For.”** You can choose a time-period (30 minutes, 1 hour, 3 hours, 6 hours, 1 day) from the popup window.

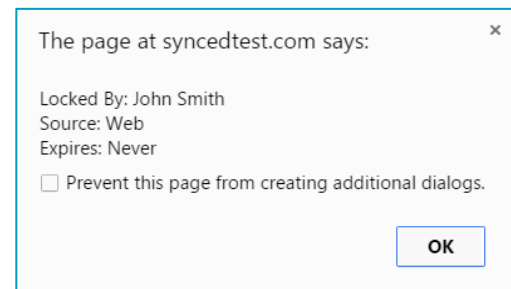
2. When you finish editing, you must unlock the item. To unlock the item, right-click the file or folder and select **“unlock.”**



## Viewing Lock Information

When you are working in the web portal, you can view information about who locked the file or folder. In the web portal:

1. Right-click the Team Share item.
2. Select **“Lock Info.”**
3. A dialog box opens with the information about who locked the item, the source, and when the lock expires.

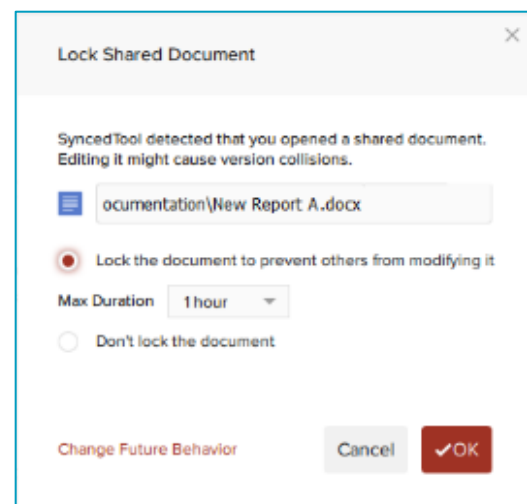


## How to Lock Files and Folders in the Desktop Client

In the desktop client, you can place locks on the Team Share, a Team Share subfolder, or a Team Share file. When you lock an item, you'll see a lock icon placed over the file or folder making it read only for other users associated with the Team Share. To manually place a lock on a file or folder in the desktop client:

1. Right-click on the Team Share item, point to the 365OmniDrive menu.
2. Select **“Lock.”** The Team Share item remains locked until you unlock it.

You can also lock the file or folder for a specific amount of time by selecting **“Lock For.”** You can choose a time-period (30 minutes, 1 hour, 3 hours, 6 hours, 1 day) from the popup window.



## Auto-Locking Word and Excel Files

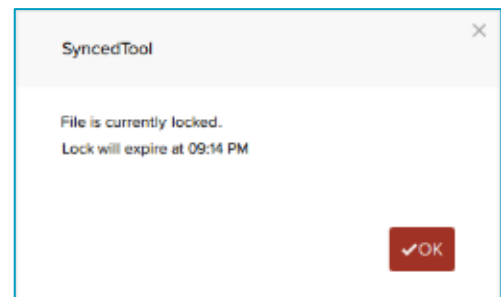
If your administrator has turned on **Auto Locking**, please note the following behaviours:

- It applies to .doc, .docx, and .xlsx, and .xls files, and .odt and .ods files if opened with LibreOffice or OpenOffice.
- It's not supported for Mac Word and .xls Excel files.
- It's only accessible from the desktop client installed on your computer (local machine).

To auto lock a Word or Excel file:

1. Click to open a file in the Team Share. A dialog box will open prompting you to lock the file.
2. Select the **“Lock the document”** radio button to confirm the lock. You can also select a maximum **“lock time-period”** in the “Max Duration” dropdown menu to determine the time-period (1 (default), 2, 4, or 8 hours). Once the time-period expires, the auto lock will unlock.
3. Depending on the administrator's configuration settings, if another user opens a file that you locked, he or she will see a popup notification. If the user ignores this notification, he or she receives a prompt to save the file with a different name.

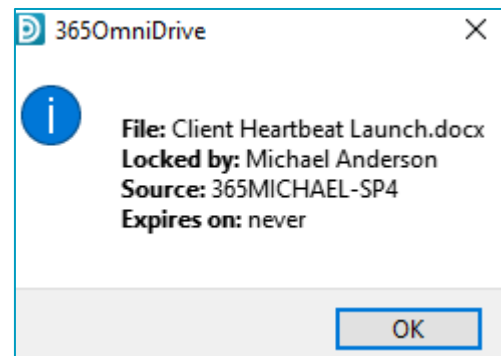
**NOTE:** When attempting to edit a Microsoft Word or Excel 2013 locked file, offending users need to actively clear the read-only notification before they can edit a file. However, older Microsoft Word versions only display a read-only notification in the toolbar area. It is important to be mindful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



## Viewing Lock Information

When you are working in the desktop client, you will see a lock icon displayed over a file or folder when locked by you or another Team Share user. You can view information about who locked the file or folder by right-clicking the Team Share item and selecting **“Lock Info.”**

A dialog box opens, providing information about who locked the item, the source of the lock, and when the lock expires.

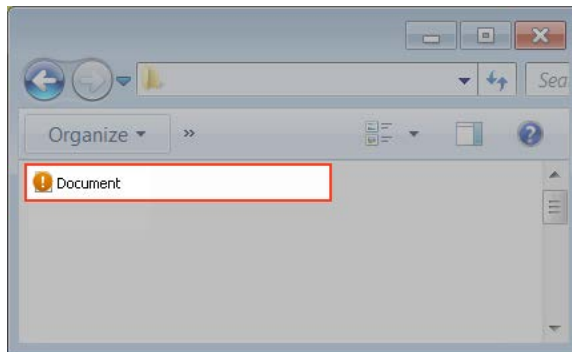


## How to Resolve File Sync Warnings

The desktop client generates file sync warnings to alert end users of potential problems with the file sync process. Each warning provides an automated resolution option.

### Common Types of File Sync Warnings

There are two types of file sync warnings when working in Team Shares:



1. **Collision:** This occurs when one file is modified in two different places at the same time. When this happens, only one of the revisions successfully syncs to the server, and the other revision is marked as a collision.

For example: User A and User B open the same file from two separate locations without locking the file. User A edits and saves her file and this new revision synchronizes to the server. User A edits and saves her file again and this updated revision synchronizes again to the server. User B is now editing an older revision of the file. When User B saves the file, it will **NOT SYNCHRONIZE** to the server and is marked as a collision.

2. **Locked Change Warning:** A locked change warning occurs when a user attempts to modify a file previously locked by another user, either at the file or folder level.

For example: User A locks a file and its marked with a lock icon. Later, User B opens the file, ignoring the lock icon, and begins modifying the file. When User B attempts to save his revision, it does not immediately synchronize with the server, and is marked with a locked change warning. When User A unlocks the file, User B's revision will automatically synchronize to the server without any additional action on his part.

Your administrator can configure file locking, so that locks are stronger (hard locks). In this instance, you will not encounter a locked change warning. For more information, please contact your administrator.

**NOTE:** If Team Share users forget to lock files and folders before making changes, file sync warnings occur more often. Therefore, it's considered a best practice to lock files or folders before making changes.

## Resolving a Collision

When a collision occurs, you'll see a "Resolve Sync Conflict" icon. To resolve a collision:

1. Click the 365OmniDrive icon on your computer's system tray or menu bar and select the **"Sync Conflicts"** notification icon.

**NOTE:** On a Windows machine the 365OmniDrive icon is located in the lower right-hand corner and on a Mac machine in the upper right-hand corner of the screen.

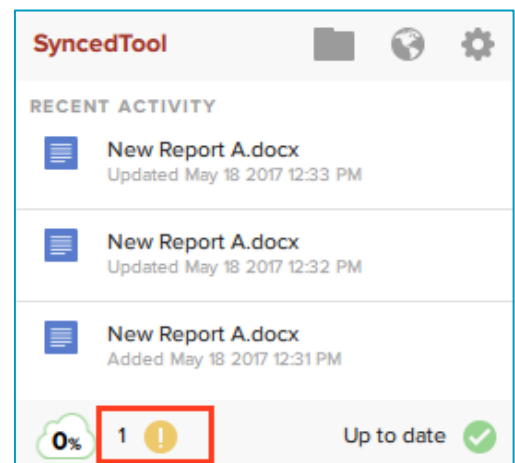
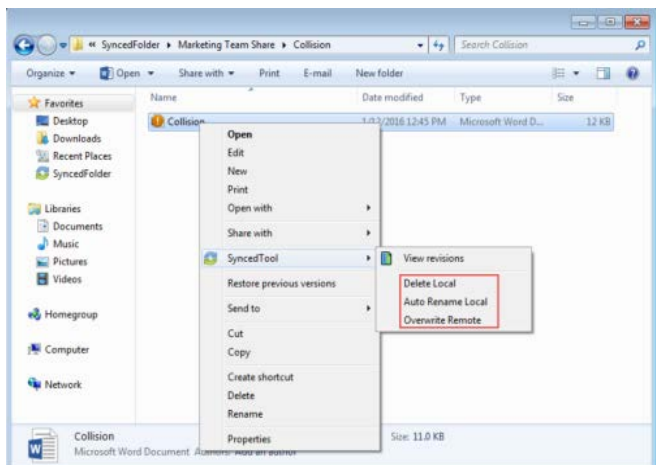
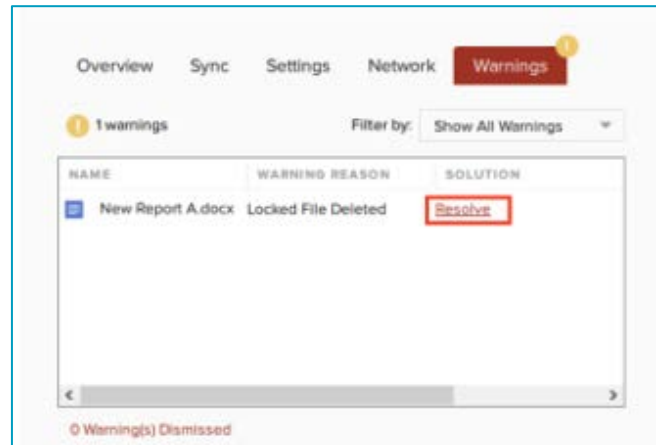
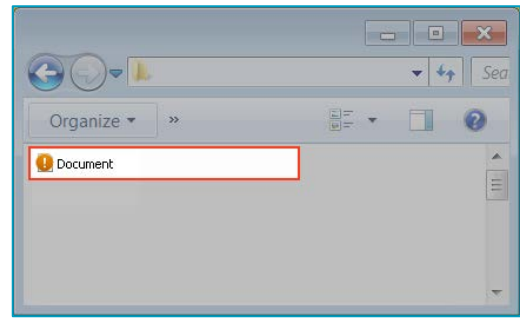
2. The "Preferences" dialog box opens. Click the "Warnings" tab and select the **"Resolve"** link to learn more about the collision. You can click the:

- **"Rename"** button to rename your copy to include the term **(collision)** to the end of the file name. If performing this option, you'll see two files: the **original\_file\_name** file and the **original\_file\_name\_(collision)** file.
- **"Discard"** button to delete your copy without saving changes.
- **"Overwrite Current"** button to sync your local copy as the current server revision.

**NOTE:** this option is only available if set by the administrator.

3. Alternatively, you can resolve the file sync warning directly within Windows Explorer or Mac Finder.

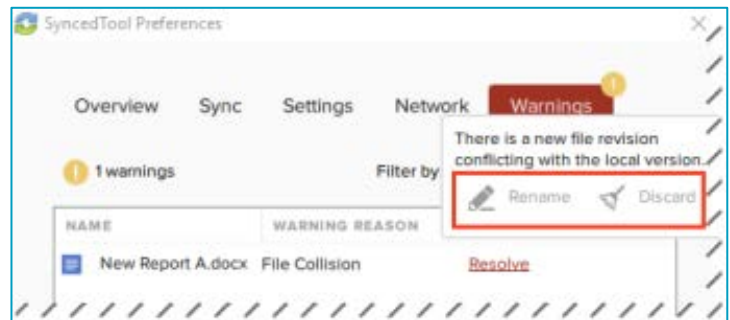
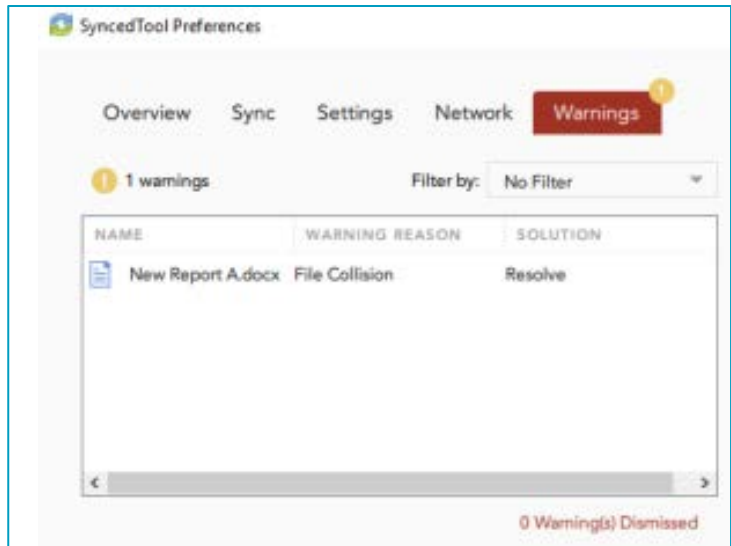
For example: on a Windows machine, right-click the affected file and select your preferred option.



## Resolving a Locked Change Warning

To resolve a locked change warning in the “Warnings” tab, click the:

1. “**Resolve**” link to view more information about the locked change warning.
2. “**Dismiss**” link to clear the warning. The system will resolve this issue once the lock removes.



## File Sync Warnings

In total, the desktop client can generate six different types of file sync warnings:

Sync Warning	Description	Resolution Options
File Collision	<ul style="list-style-type: none"> <li>• A file modified in two different places at the same time.</li> <li>• The system will not attempt to merge these changes and will save the first file that finishes uploading as the latest revision.</li> <li>• The other version is saved on the local machine but marked as a collision.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Discard local changes:</b> discard your local copy without saving changes.</li> <li>• <b>Rename local file:</b> rename your local copy to include the term “(collision)” on the end. When performing this option, you’ll see two files: original_file_name and original_file_name_(collision).</li> <li>• <b>Overwrite remote revision:</b> sync your local copy as the current server version (this is only available if your administrator tuned on “Allow Users to Overwrite Collisions” policy).</li> <li>• <b>Dismiss:</b> temporarily ignore the warning (not recommended as a long-term solution).</li> </ul>
Folder Collision	<ul style="list-style-type: none"> <li>• A duplicate folder exists.</li> <li>• For example: Share and Share (collision 1).</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Dismiss:</b> temporarily ignore the warning (not recommended as a long-term solution).</li> <li>• <b>Rename:</b> rename the conflicted folder.</li> <li>• <b>Delete:</b> delete the conflicted folder.</li> </ul>
Locked Changes	<ul style="list-style-type: none"> <li>• A user has attempted to modify a locked file or changed the structure of a locked folder.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Dismiss:</b> temporarily ignore the warning (this warning resolves itself when the file or folder unlocks).</li> </ul>
Invalid Credentials for a Synced Network Path	<ul style="list-style-type: none"> <li>• Saved credentials for a network path have changed.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Dismiss:</b> temporarily ignore the warning (not recommended as a long-term solution).</li> <li>• <b>Enter new credentials:</b> enter updated credentials for the network path.</li> </ul>
Folder Permission Error	<ul style="list-style-type: none"> <li>• A folder is not accessible due to a permission conflict.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Dismiss:</b> ignore the warning.</li> </ul>
Synced Root Folder Missing	<ul style="list-style-type: none"> <li>• A synced root folder deleted or missing during service start.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Dismiss:</b> temporarily ignore the warning (not recommended as a long-term solution).</li> <li>• <b>Unsubscribe:</b> unsubscribe from the root folder.</li> <li>• <b>Re-fetch:</b> attempt to resync the root folder.</li> </ul>



# RESTORING FILES AND FOLDERS

The system provides many options for protecting and restoring data. When you use 365OmniDrive your data is safe and protected.

For example: You can restore older file and folder revisions, deleted files and folders, or use the “Revision Rollback” feature to restore all files within an entire folder to an earlier revision before a selected date.

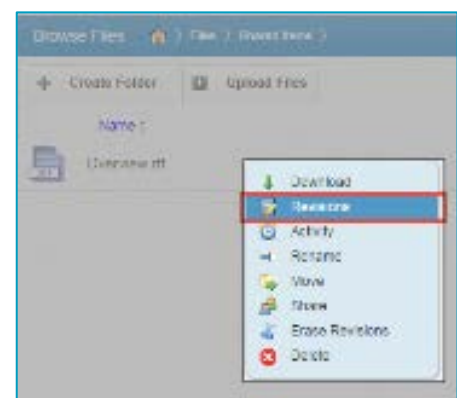
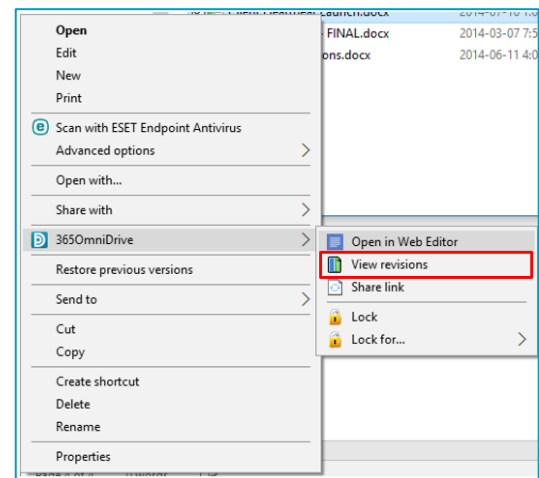
This section provides you with information on how to protect and restore your data.

## How to View and Restore a Revision

When you edit a file, the system keeps track of each revision. Using the revisions feature in the web portal, you can view and restore older file revisions. This feature is useful when you make a mistake editing and saving a file, or if you want to see revisions made by other Team Share members.

To view and restore revisions:

1. From your desktop client right-click a file and select “**View Revisions,**” from the 365OmniDrive menu, or if you are working in the web portal, right-click a file and select “**Revisions.**”
2. The “Browse File Revisions” page opens, listing all file revisions.
3. Click the title of the file to view in the web preview tool.
4. Click the “**Download Revision**” link to download a previous revision to your computer.
5. Click the “**Restore Revision**” link to overwrite the current file with the previous revision.



Browse File Revisions - Overview.rtf						
Revisions for Overview.rtf						
Filename	Received	File Size	Full Size	Delta Size	Download	Restore
Overview.rtf	October 06, 2014 at 08:02AM	43.49k	8.50k		Download Current	Current Revision
Overview.rtf	October 03, 2014 at 09:28AM	2.81k	864b		Download Revision	Restore Revision

## How to View and Restore Deleted Files and Folders

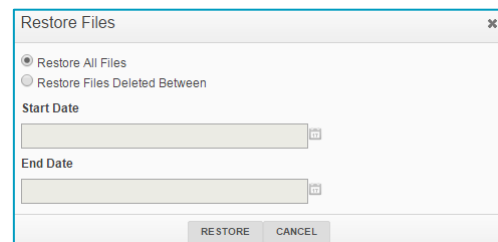
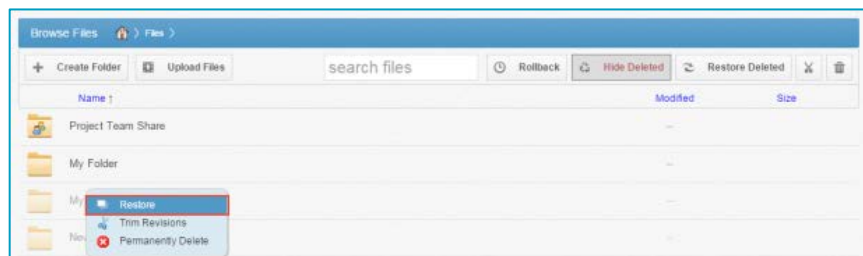
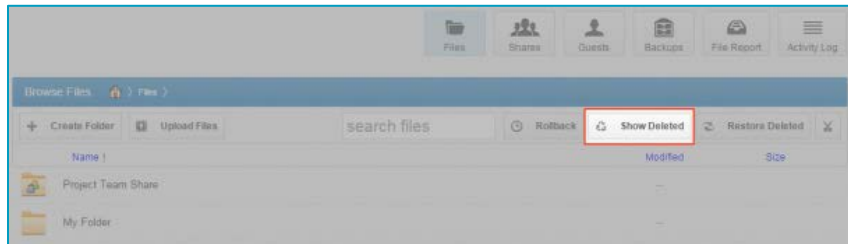
Depending on your administrator's settings, you can view and restore deleted files and folders from within the web portal. The ability to view and restore deleted content is one of many data protection features available to you.

To restore files and folders from the web portal:

1. Click the “Files” tab.
2. The “Browse Files” page opens, click the “**Show Deleted**” button. The deleted files and folders display as semi-transparent.
3. Right-click an individual file or folder and select the Restore link, or to restore all deleted files in the current folder, click the “**Restore Deleted**” button in the toolbar.

The **Restore Files** dialog box opens allowing you to restore deleted files, or select certain files deleted between a specified time frame.

**NOTE:** You cannot navigate away from the page until the restore process is complete.



# FILE REPORT AND ACTIVITY LOG

In addition to managing and sharing files and folders, you can keep track of files and activity using the web portal's:

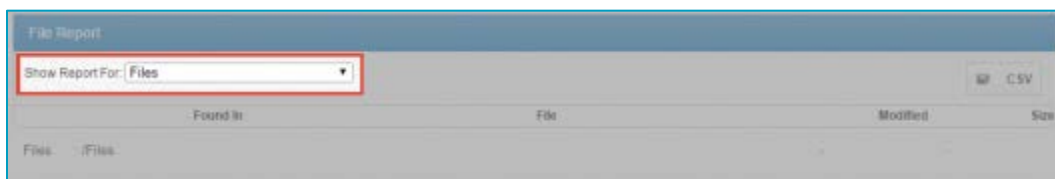
- **File Report:** Allows you to generate reports for your files and export to your computer.
- **Activity Log:** Allows you to track usage across the system, view audit trails, and track Team Share users and guest account activity.

## How to View File Reports

The “File Report” page allows you to track your content. You can filter content by a folder or Team Share. You can view files within a folder and sort by date modified and file size. You can also download a .CSV report to your computer.

To view file reports in the web portal:

1. Click the **“File Report”** icon at the top of the screen.
2. From the “Show Reports For” dropdown menu, select the folder you want to view. The information displayed for each file includes:
  - **Found In:** the folder in which the file is located.
  - **File:** the path and file name.
  - **Modified:** the date the file was modified.
  - **Size:** the file size.



3. Optionally, click the **“CSV”** button to export a report to your computer.

## How to Track Activity

The “Activity Log” page allows you to track activity across the system from one central location. You can track usage, view audit trails, and follow Team Share users and guest account activity.

To track activity in the web portal:

1. Click the “Activity Log” tab.
2. In the “Activity Log” page, use the fields to filter activity based on specific criteria you want to track:
  - **Show activity in:** select the folder or Team Share.
  - **With activity type of:** select the activity type.
  - **Between:** enter the date on which the activity occurred.
  - **Show activity by:** select the user who performed the activity, including guest accounts you created.
  - **Filename contains:** enter a set of characters to filter your search.
3. When finished entering your criteria, click the “**Submit**” button.

The image shows a screenshot of a web portal's "Activity Log" filter section. It features several input fields and buttons. At the top, there are two buttons labeled "CLEAR" and "SUBMIT". Below these are two rows of filter fields. The first row includes a dropdown menu labeled "SHOW ACTIVITY IN:", a text input field labeled "ENTER DATE RANGE HERE", and a date input field. The second row includes a dropdown menu labeled "SHOW ACTIVITY BY:", a dropdown menu labeled "WITH ACTIVITY TYPE OF:", a date input field, and a text input field labeled "FILENAME CONTAINS:". At the bottom of the filter section is a blue button labeled "GO TO ACTIVITY LOG".

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