

# Egnyte admin guide



**EGNYTE**

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# Introduction

This guide is intended to provide a high-level overview of Egnyte's online file sharing and collaboration features as well as explain some of the basics every Admin needs to know to manage Egnyte successfully.

For information about how to deploy Egnyte in your organisation, please refer to the deployment guide

## The basics

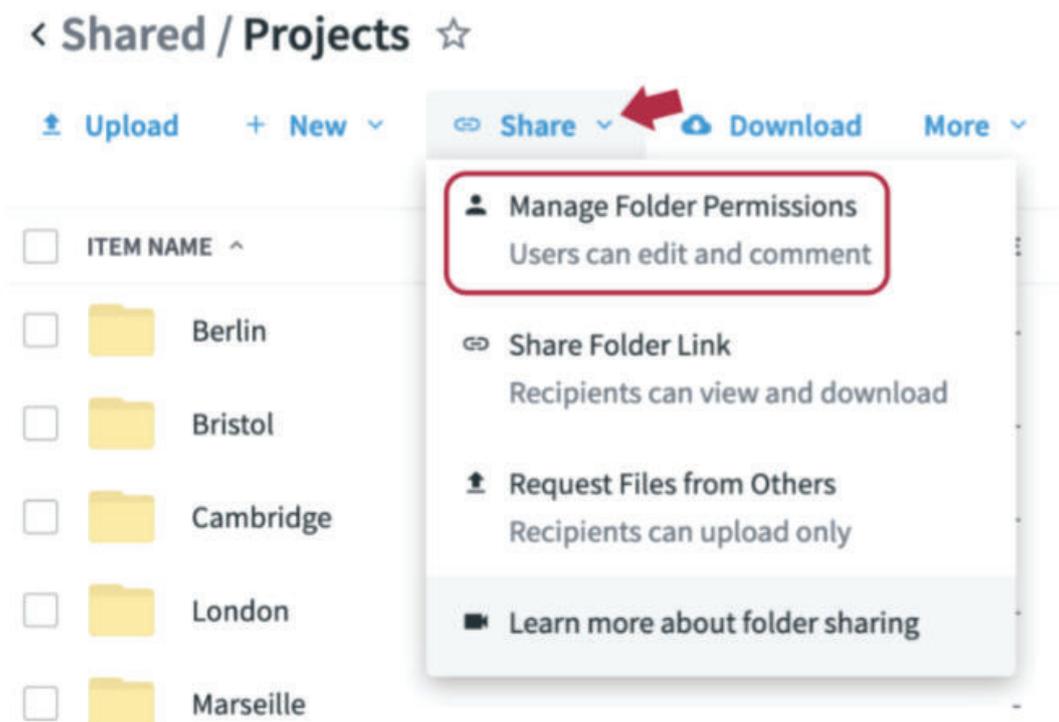
Egnyte provides one of the most comprehensive systems for business file sharing. This section highlights the different ways you can collaborate on files, including sharing file and folder links and assigning permissions to users.

Files in Egnyte are saved into one of two folders: Shared or Private. Shared folders can be accessed by any user who has been given permission to access that folder.

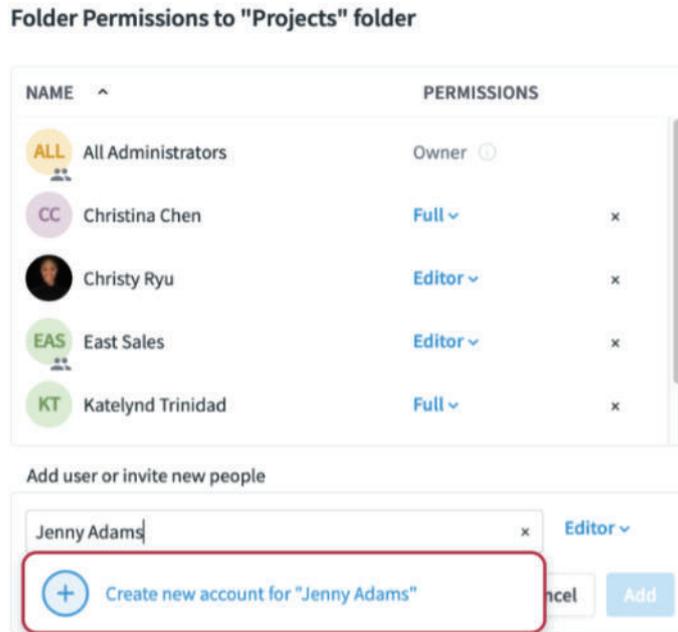
The contents of private folders are visible only to the user who owns the folder and all Administrator Users.

## Share folders using permissions

The easiest way to collaborate on files is to give a user permission to folders. To share a folder, navigate into the folder, click **Share** in the folder actions bar, and click **Manage Folder Permissions**.



Search for the username or group name in the search bar to grant existing users' permissions to the folder, or click **Create new account** for \_\_\_\_\_ to create a new user account for them. An invitation will be sent to their email address with instructions for logging in. You can share folders with anyone; they don't have to be registered with Egnyte.



When inviting new users to Egnyte, you have the option of choosing whether new users should be made Admin Users, Power Users (labeled "employees"), or Standard Users (labeled "non-employees.")

The Standard User role should be used for outside business partners; Standard Users don't have access to advanced Egnyte features like FTP file transfer or the Desktop App.

The Power User role should be assigned to employees at your company; Power Users have access to a wider range of Egnyte features, like their own private folder and Desktop App.

When you invite a new user to share a folder, they will have access to all files in the folder and sub-folders within the folder by default. However, you can tailor folder permissions so that a user is denied access to specific sub-folders.

When fellow employees and outside business partners collaborate on a project, you may want collaborators to have different levels of control over the files contained in the folder to protect against file deletions and other unauthorised modifications.

Egnyte provides the ability to assign four different access levels to project folders: Viewer, Editor, Full, and Owner. The following chart lays out each level's permissions.

	Viewer	Editor	Full	Owner
Download/Read Files, Folders	Yes	Yes	Yes	Yes
Copy Files, Folders	Yes	Yes	Yes	Yes
Upload/Edit Files, Folders	No	Yes	Yes	Yes
Create Sub-folder	No	Yes	Yes	Yes
Rename Files, Folders	No	Yes	Yes	Yes
Move Files, Folders	No	No	Yes	Yes
Delete Files, Folders	No	No	Yes	Yes
Edit Folder Sharing	No	No	No	Yes
Create Upload Links	No	No	No	Yes
Set Permissions	No	No	No	Yes

# Share links

Sharing information uploaded to Egnyte is easy and secure. When you're ready to share with a colleague, business partner, or customer, create a customizable link to give them the right amount of access without putting your company at risk. The default settings for Share links can be changed by navigating to the **Configuration** tab of **Settings**, opening the **General** page, and scrolling down to the **Sharing** section.

## Sharing

Users can share files

Enabled

Allow the following link types:

- Public (no password)
- Public (password protected)
- Private (all account users)
- Private (recipient-only)

Default type:

Public (no password)

Once you've located the file or folder you need to send, hover over it and click the **Share** icon that appears to the right. You can also click the box next to the file or folder and select **Share** from the menu.

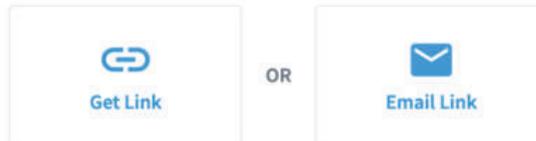
The image contains two screenshots of the Egnyte file management interface. The top screenshot shows a file list with columns for ITEM NAME, SIZE, DATE MODIFIED, and UPDATED BY. The file 'Shipping order.docx' is highlighted. A red arrow points to the 'Share' button next to it. A dropdown menu is open, showing 'Share Link' and 'Get more Apps & Integrations'. The bottom screenshot shows the same file list, but the 'Shipping order.docx' file is selected with a checkmark in the checkbox. A red arrow points to this checkmark. A context menu is open for this file, showing options like 'Open In...', 'Download', 'Preview', 'Share...', 'Comments (0)', 'Tasks', 'Versions & History', 'Details', 'Move/Copy', 'Rename', 'Lock', and 'Delete'. The 'Share Link' option in the context menu is also highlighted with a red arrow.

From here, you can share the file with the default settings by selecting Get Link or Email Link. The Get Link option will allow you to copy the link into your native email provider, chat program or a document, while Email Link will send an email through Egnyte.

#### Public link for "Shipping order.docx"

Anyone will have access. This link will expire on Mar 3, 2020

[Change link options](#)



You can also adjust the link sharing options before they're sent by clicking Change link options. Determine exactly who can access the link, what they can do with the file, and if they'll see the most recent version.

#### Public link for "Shipping order.docx"

Who will have access?

Anyone

Allow downloads?

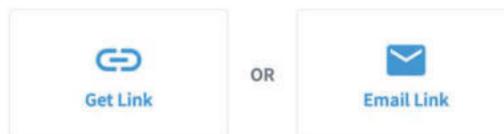
Yes

Link expires on date Mar 3, 2020

Notify me when link is clicked

Include file name in link

Always show the most recent version of the file



#### Who will have access:

- **Anyone:** Anyone you send the link to will be able to access the folder or file. If the person you send the link to shares it with others, they'll also be able to access the link unless additional options have been applied (see the Additional options section below for more information).
- **Anyone with a password:** Anyone you send the link to and has been provided with the password will be able to access the link. If the person you send the link to shares it and the password with others, they'll also be able to access the link unless additional options have been applied (see the Additional options section below for more information).
- **Your Domain File Server users:** Any user that has been set up with login credentials on your domain will be able to access the link. The user must login to access the link. This works for Admins, Power Users, or Standard Users as long as they've been set up in Egnyte.
- **Your Domain File Server users I email this link to:** Any user you send this link to that has also been set up with login credentials on your domain will be able to access the link. The user must login to access the link. This works for Admins, Power Users, or Standard Users as long as they've been set up in Egnyte and you send them the link.

## Allow Downloads:

- **Yes:** The recipient will be able to download a copy of the file.
- **No:** The recipient will only be able to view the file but cannot download a copy.

## Additional options:

- **Link Expires:** You can choose on date to have the link expire after a certain date. After this date, the link will no longer work. You can also select after to choose a number of clicks that are allowed before the link expires.
- **Notify me when link is clicked:** You'll receive a notification each time the link is accessed.
- **Include file name in link:** The full file name will be included with the link. This option is helpful if you are sending multiple file links in one email.
- **Always show the most recent version of the file:** If this option is checked, the recipient will be able to see the newest version of the file.

## Link Summary Report

The Link Summary Report allows Admins to view all of the file links active in your Egnyte account. As an Admin, you can delete any link at any time. Our Reports and Auditing Overview article will walk you through how to run a report and explains what each report captures.

## File Versions

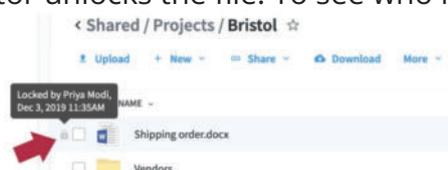
When files are updated in Egnyte, new versions are created instead of overwriting the original file. That means you never have to save files with different names just to keep track of the versions. The most recent version of the file becomes the current version and the previous versions are stored in Egnyte. The number of versions available is indicated by a counter to the right of the document. To access older versions, click the counter.



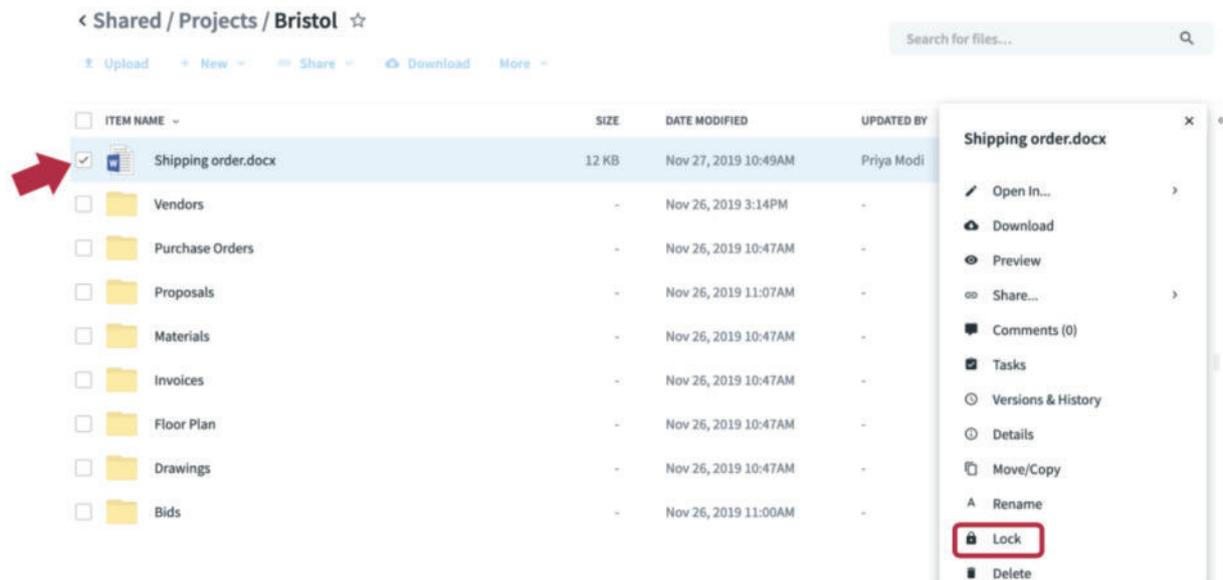
You can download an older version or promote it to become the current version. This is especially helpful when you want to track changes or need to find information that was accidentally deleted.

## Locked Files

When a file is being edited by another user or has been manually locked, a padlock icon will appear next to the file name. If you see this, you'll only be able to view a read only copy of the file and no additional edits can be made until the original user closes the document or an Administrator unlocks the file. To see who locked the file, simply hover over the lock icon.



You can manually lock a file to prevent other users from changing the file. To do this, select Lock from the quick menu. This can be used to prevent version conflicts while waiting for a file to be approved.



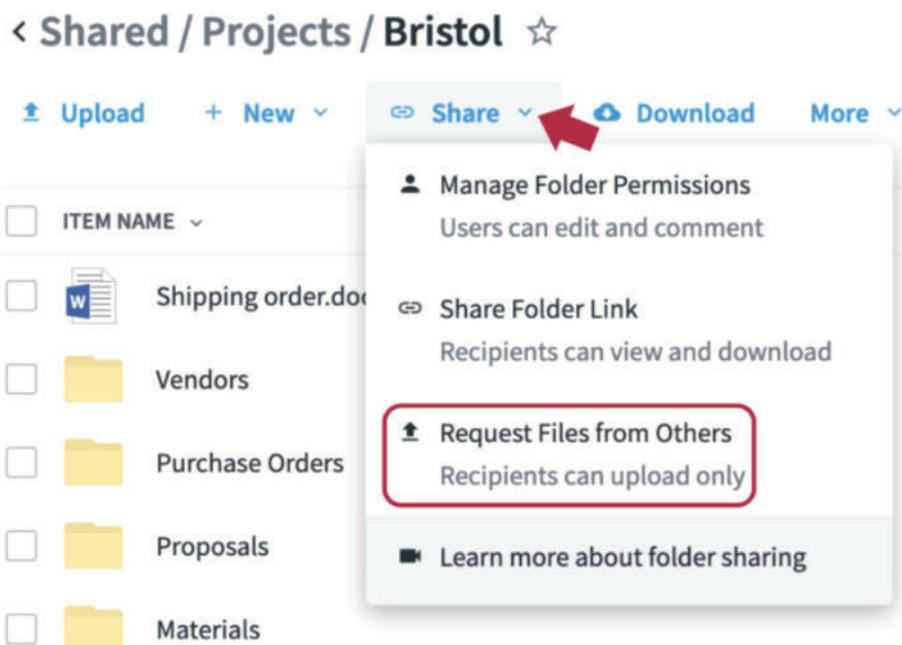
As an Admin, you can run a Lock Summary Report on all files that are currently locked and unlock any of those files.

## Upload Links

As an Admin, you'll be able to create upload links to invite anyone, with or without an Egnyte login, to add content to Egnyte.

These links are the safest way to request files as they are given access to a portal to add content, but cannot browse folders on Egnyte. As an added benefit, each file that is uploaded via a link is scanned for malicious content so you can be sure your data is not at risk.

To create an upload link, navigate to the folder you want the information uploaded to, click **Share**, then **Request Files from Others**.

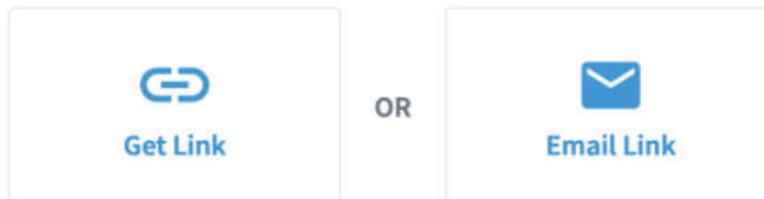


Choose if the link should expire and if you'd like to create a separate folder for each person that uploads content. You can email a copy of that link right through Egnyte or send the link through any other communication method.

## Upload link for "Bristol"

Invited people will receive a link. After opening the link they will be able to upload files, but they will not see content of this folder.

- Link expires in 1 month ▼
- Create separate folder for files received from each person



Once the recipients of the link have uploaded files, you'll receive an alert and will immediately have access to them in Egnyte.

<input type="checkbox"/> ITEM NAME ▼	SIZE	DATE MODIFIED
<input type="checkbox"/>  Sandra Taylor (khunt@egnyte.com) via link	-	Nov 26, 2019 11:02AM
<input type="checkbox"/>  Jacen Hunt (khunt+1@egnyte.com) via link	-	Dec 3, 2019 12:22PM
<input type="checkbox"/>  Austin Mack (khunt+1@egnyte.com) via link	-	Nov 26, 2019 11:02AM

## Applications

Egnyte offers a host of different applications that can be implemented across your organisation to promote collaboration and increase ease of access for important assets.

### WebEdit

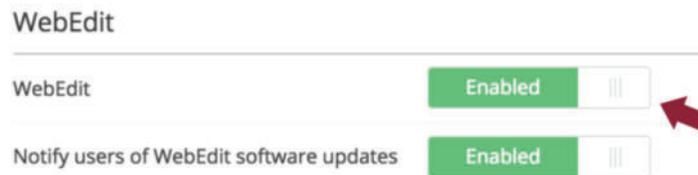
WebEdit enables you to select a file from our Web UI and automatically open the file in its native application. Changes you save will automatically appear in the cloud as new versions. This lightweight product is ideal for users who need to edit files on their desktops, but don't want to install Desktop App or Desktop Sync. It's also more convenient than downloading, editing, saving and uploading the saved version back to the cloud.

WebEdit is available by default to all users. If you'd like to have this application automatically enabled for all of your users, you can head to Apps & Integrations and select Egnyte Apps at the top of the page. From here, locate Egnyte WebEdit, click the Download drop-down, and choose the right version to download (Windows or Mac).

If you'd like to silently mass deploy WebEdit to Windows computers, start by deploying the .msi file as you normally would. There are no optional parameters to set and you can run "/?" to see all requirements. Make sure you choose a location to house the .msi file. There is currently no mass deployment option for Mac.

Command: MSIEEXEC /i {path to downloaded msi file}

If you're the account Administrator and don't want your users to have this feature, you can disable it by going to the Configuration tab from Settings and selecting Applications from the list. Scroll down until you see the WebEdit section. Once you have disabled the setting, users will no longer see the Edit on your desktop option from the menu.



## Mobile App

Egnyte provides one of the most comprehensive mobile applications for accessing and uploading files on the go. Download the mobile app and sign in with the same user credentials as you do from the Web UI.

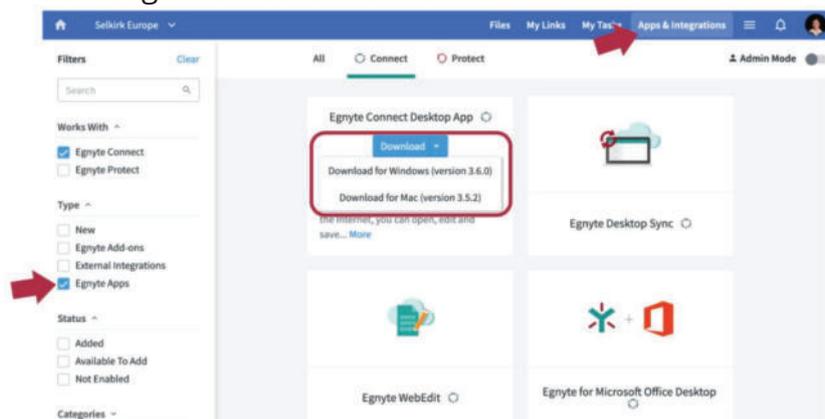
Once you're signed in, you can view, download, and upload files (if you have permission).

As an Admin, you may want to force users to enter a passcode or require that assets stored on the device are encrypted. You can access all Mobile settings from the Configuration tab of Settings on the Applications page.

## Egnyte Desktop Application (Desktop App)

The Desktop App gives you access to all your files stored on the cloud through a network drive (Windows) or volume (Mac). You'll be able to find your folders quickly in a familiar environment without having to take up space on your computer. You'll even be able to sync selected folders for offline access so you're never without important information.

To begin installation, navigate to Apps & Integrations and select Egnyte Apps from the Type filter. Once you've found the Egnyte Connect Desktop App, click the Download button and choose the appropriate option for Windows or Mac. Open the installer file and follow the steps as directed. Once you log in using your Egnyte credentials, it will be available to access through the network drive.



If you know most of your users will be utilising the Desktop App, save time by mass deploying the application. The instructions will differ depending on if your mass deploying it for Windows or Mac devices. As with the mobile app, you can take advantage of device entitlement for the Desktop App.

## Storage Sync

Storage Sync allows you to synchronize the contents of your NETGEAR NAS device, or VMware, Hyper-V, or AWS VM to Egnyte. This means you'll have fast local access when you're in the office, but can still access files when you're away. This is especially helpful if you often work on large files that use a lot of bandwidth.

## Administrator Functions

Once you've completed your initial deployment, have a good understanding of how to navigate Egnyte, and have customised the settings to meet your company's needs, it's time to learn how to keep Egnyte running smoothly.

Often times, companies will create a few Admin Users that are responsible for administering their departments users (creating and maintaining users and groups) and permission levels since they know who needs access to their folders. If you have role based administration on your account, you can also give some Admin roles (reporting, managing Power or Standard Users, manage billing...) to specific Power Users.

## Manage Users

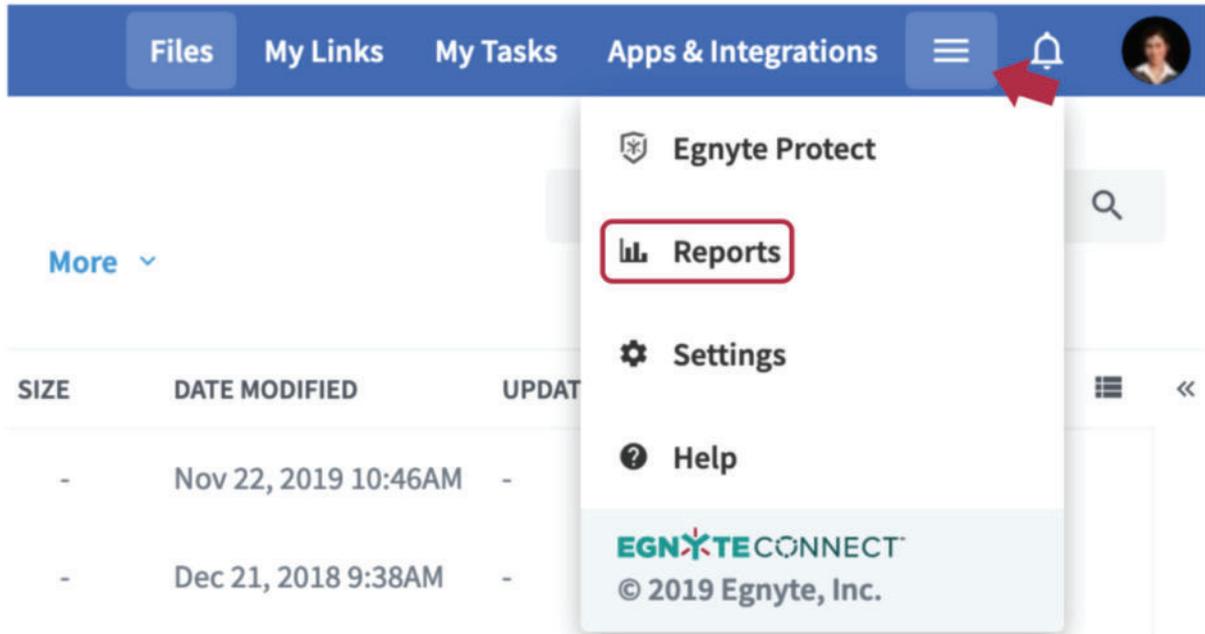
If you use Egnyte for your authentication method, you will create and maintain users and groups from the Egnyte Web UI. You'll complete the following maintenance requests from the **Users & Groups** tab under **Settings**.

	Name	Email Address	Type	Status
<input type="checkbox"/>	Tom Sampson	tom.sampson@egnyte.com	Power User	Pending
<input type="checkbox"/>	Terry Mullahan	terry.mullahan@egnyte.com	Power User	Pending
<input type="checkbox"/>	Maxter Tammy	maxter.tammy@egnyte.com	Administrator	Active
<input type="checkbox"/>	sunyuen	sunyuen@egnyte.com	Power User	Pending
<input checked="" type="checkbox"/>	spencercalloway	spencercalloway@egnyte.com	Administrator	Active

- **Delete:** Completely removes the user profile and deletes all of the Private folder content.
- **Deactivate:** Deactivates the user profile so it cannot be used to log in with, but retains the Private folder contents and more. This is typically the preferred option. Learn more about the differences between deactivating or deleting a user.
- **Change user type:** Change the user type from Standard User to Power User and more. The options that display will depend on the types of users selected.
- **Add to group:** Add the selected user(s) to a group you've created. Groups are a great way to help keep your users and permission levels organised. Learn how to create new groups.

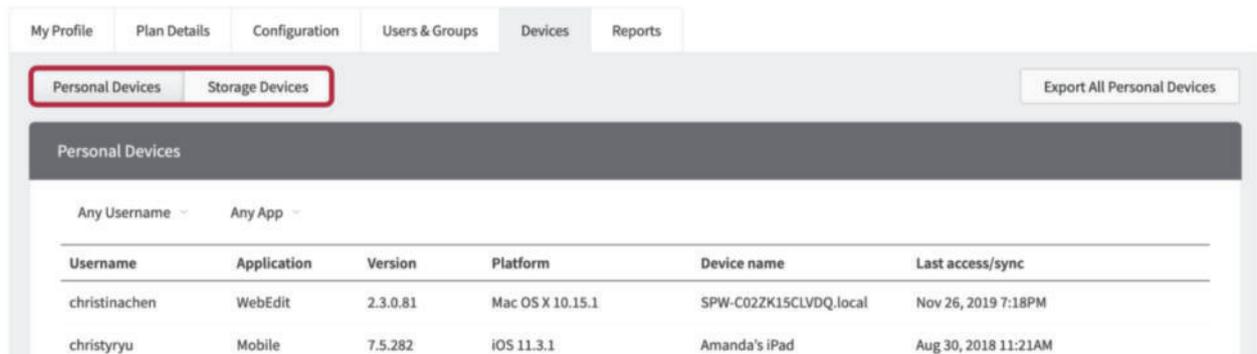
## Run Reports

Reports and audits help you track changes, gather important information, and manage risk. You can access reports by clicking on the menu icon and selecting Reports from the drop-down. In the Reports Center, you will have many report types to select from.



## Monitor Device Activity

To monitor a list of devices which have accessed your account, check out the Devices Dashboard. You can review information like the last time the device logged in, its name, type, and more. Users who have purchased our Device Control Suite will be able to remotely wipe Egnyte content from devices which have been lost or stolen.



## Create Folder Templates

If you use a similar folder for each new project or sales opportunity, create folder templates using the Advanced Folder Copy feature. You can copy an entire folder hierarchy, including template files, to another destination within Egnyte.

# Apps and Integrations

Egnyte integrates with many 3rd-party apps that businesses like yours use to increase productivity and collaboration. Some of the most popular applications and integrations are listed below.

1. **Egnyte for Microsoft Office Desktop:** Adds links to an email without ever leaving Outlook
2. **Egnyte for G Suite:** Bring Google Docs and Drive information into Egnyte for seamless collaboration.
3. **Egnyte for Salesforce:** Access and share files in Salesforce and Egnyte.
4. **Egnyte for DocuSign:** Adds DocuSign digitally signed documents to Egnyte.

You can see a full list of apps and integrations Egnyte currently offers by clicking **Apps & Integrations**.

