

SyncedTool Training Guide

Provides **file sync and backup between Servers, PCs and mobile devices.**

Enables employees to sync files between servers, laptops, desktops, smart phones, tablets, and the web.

Makes it possible for users to access all of their files on **any device and to collaborate with colleagues, clients, and business partners.**

How to get Support

Visit our website for training guides and videos on the SyncedTool software. Go to **www.itinthebubble.com** click on **Business Services** then **File Sync and Backup**

Call us at **470-481-0400 Option 2**

email **support@itinthebubble.com**

We are available **9:00am - 5:30pm** for normal business hours support and **24 hours for emergency** assistance



Login Details

Web Portal...

<https://www.syncedtool.com>

Your default login and password

Login: Full E-Mail Address

Password: WelcomeFL!

(F = First Name Initial, L = Last Name Initial)

Once logged in, click on your name to change your name or password. You can also enable Two Factor Authentication if you wish for added security.



How to access your files

Web Portal – How to use the web portal.

Desktop App

Mobile App

Outlook Plugin

Web Portal

Once logged in, you will see your **Public (Team Shares) and private files.**

Shares for Team Share Settings

Guests to add/edit guest accounts (non-company users with access to specific files)

Backups to setup computer folder backups.

File Report to see file details

Activity Log for advanced audit logs

The screenshot shows the web portal interface for 'IT in the BUBBLE'. At the top, there is a dark navigation bar with 'My Files' on the left, 'Logged in as [redacted]' in the center, and 'Download SyncedTool' and 'Log out' on the right. Below this is a white header area with the 'IT in the BUBBLE' logo on the left and a row of six icons: Files, Shares, Guests, Backups, File Report, and Activity Log. A blue breadcrumb bar reads 'Browse Files > Files >'. Below the breadcrumb are two buttons: '+ Create ...' and 'Upload Files'. To the right is a search bar labeled 'search files' and four utility icons: a clock, a trash can, a refresh arrow, and a scissors icon. A table header is visible with columns for 'Name', 'Modified', and 'Size'. The first row shows a folder icon and the text 'Public Documents'. Below the table is a large white area with the text 'Drag files or folders here to upload them.' At the bottom right corner, the version number 'Build 2.6.0.1156' is displayed.

Web Portal – Files

From this screen you can add Files or Folders, search, recover deleted files or restore previous versions.



Click on **Create** to add a new folder, document, spreadsheet or presentation.

Click on **upload** to add a file you have already created.

Click in the search box and enter any part of a filename you are looking for to search the entire system.

Icon Descriptions in order...

Rollback – Allows you to restore all files to a previous version.

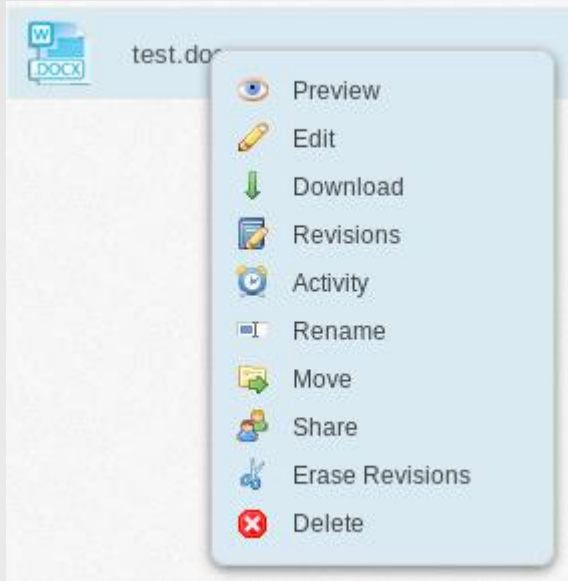
Show Deleted – Will show all files including deleted files (Deleted files are kept for 90 days.)

Restore Files – Restores all files in the selected folder.

Erase all revisions – Use with extreme caution, removes all previous versions of all files.

Web Portal – Files Continued

Right Click Menu



Right clicking a file will open all your available options.

Preview – Opens the file in web browser read only.

Edit – Opens the file in web browser for read and write ability. You may also collaborate with others through live editing of the file.

Download – Download a copy of the file to your computer

Revisions – Access an older version of the file, great for recovery from mistakes or corrupt files.

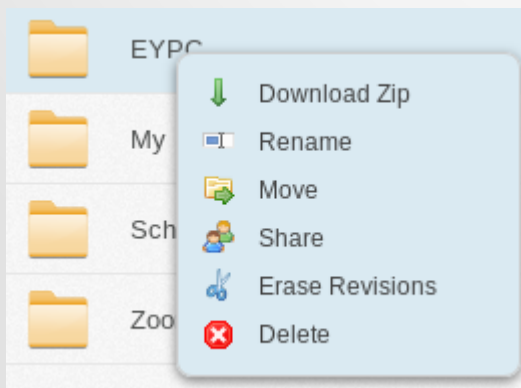
Rename – Change the file name.

Move – Move the file to another location.

Share – Opens the file share box, allows for open or secure file sharing with others on or off the system.

Erase Revisions – Use with Caution, removes all old versions of the file.

Delete – Remove the file, still recoverable.



Right click of a folder has similar options. NOTE: Will not work on Team Share Folders by design.

Download Zip – Downloads all files in the folder as a ZIP.

Share – Share the folder with others

Erase and Delete – Use with care, removes folder and everything under it.

Web Portal – File Sharing

Share Access ✕

Secure Share ?

Public Share URL

COPY

Allow anonymous users to edit files

▶ Share Options

▽ Share With

Recipients

Notify New Recipients Everyone None

Message

Name	Can Modify	Remove
Tim Brogdon tim@itinthebubble.com	<input type="checkbox"/>	✕

DELETE SHARE

Right click a file or folder and select Share.

Secure Share - Requires the recipient to login with a username and password provided via email. This is great for private data and meets HIPAA regulations.

Public Share URL – Provides a link you can copy or send via email to anyone. This link is open to anyone, great for website or generic information.

Share Options – Set a date for the share to expire, limit the total downloads or enable download notification alerts via email.

Share with – Required for Secure Share, optional for Public Share. Enter one or more email addresses to send a link and message. Optionally allow recipients to edit files.

Web Portal – Shares Button

The screenshot shows the 'Shares - Team Shares' section of a web portal. At the top, there are three tabs: 'Team Shares', 'Items Shared By You', and 'Items Shared With You'. Below the tabs, the heading 'Team Shares' is displayed. Underneath, there is a table with a 'Share' column header. The table lists three items under the 'Files/Public Documents' category, each with 'ON' and 'OFF' toggle buttons.

Share	
Files/Public Documents	
Daily Email Digest	<input type="checkbox"/> ON <input checked="" type="checkbox"/> OFF
LAPTOP-GOH1I2UH	<input checked="" type="checkbox"/> ON <input type="checkbox"/> OFF
WDRICH000100	<input checked="" type="checkbox"/> ON <input type="checkbox"/> OFF

Here you can see Team Shares.

Daily Email Digest – This will email you an audit trail of changed/added files.

LAPTOP... - Each computer connected to the team share can be turned on or off. This will add/remove the team share to that specific computer.

Selecting Create Team Share allows you to create a new share, you can then select which users have access to this share.

NOTE: Folders created outside of a team share are private. Team shares are designed to share all files within it with all or select employees.

The screenshot shows a 'CREATE TEAM SHARE' button at the top right. Below it is a table with two columns: 'Created' and 'Manage'. The 'Manage' column contains a folder icon.

Created	Manage

Web Portal – Shares Button Continued

Items Shared By You

Here you can see a list of items you have shared, who they are shared with, if they have viewed or downloaded as well as the share link if you need to share it again. You can also edit the share and add additional people as needed or delete the share. This will NOT delete the file, only the share link.

Items Shared With You

This will show any files shared directly with you, outside of Team Shares.

Shares - Shared By You

 Team Shares

 Items Shared By You

 Items Shared With You

Items You Have Shared

	File or Folder	# Views	# Downloads	Expires	Manage
▽	Files/test.docx	0	0 / Unlimited	None	 
	Tim Brogdon Account tim@itinthebubble.com	0	0	Share Link	

Web Portal – Guests Button

Guests



Here you can create temporary guest login accounts, these guest accounts are used for file collaboration or sharing.

You can create these accounts directly in the collaboration or sharing screens.

If you have a guest that needs access to multiple locations, it's good to create them here first, otherwise this is not required.

Guest Accounts

+ Create Guest

	Name	Company Name	Remove
	Example Guest example@guest.com	EY4PC	

Web Portal – Backups Button

Backups

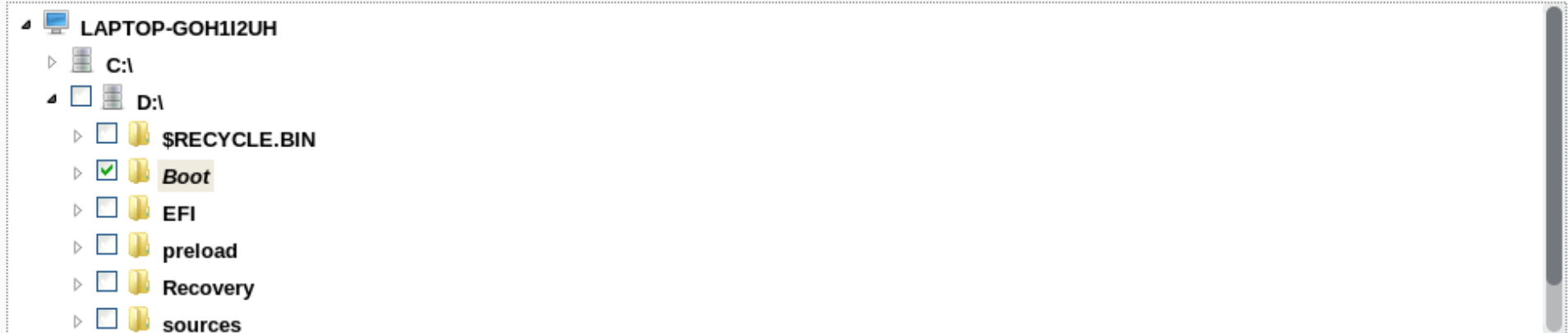
Create computer backups. This is for files outside of the SyncedTool folder. These backups are available to your login only. These backups also maintain both deleted files and revisions.

NOTE: Backups do NOT support live database files.
Examples: SQL, Access or Quickbooks.

Backups

Backups

Backup Folders



REFRESH SELECTED FOLDERS

SAVE

Web Portal – File Report and Activity Log

File Report and Activity Log

Use these buttons to review audit/change logs on files and team shares.

File Report – Lists available files, file size and last modified date. You can export to CSV (Excel) format for more control or sharing with others.

Activity Log – This is used to view specific activity for files, folders or team shares. You can export to CSV (Excel) format if needed or narrow your search by date, type of edits, user or specific file name or type. This report is great for managers or locating who changed or deleted a file.

Activity Log

Show Activity In: with activity type of: BETWEEN AND

Show Activity By: filename contains

Towanda Darden (Web) renamed file from Screenshot_20180128-173046.jpg to example file.jpg	Jan 28, 2018, 5:33:19 PM
Towanda Darden (Web) created file Screenshot_20180128-173046.jpg	Jan 28, 2018, 5:33:07 PM

Download as: [CSV](#)

Web Portal – Other Functions

Reporting

We can setup, daily, weekly or monthly reporting. If you need these, contact support.

Download SyncedTool

On the top bar, you can access the download button to install the SyncedTool Apps

Windows and Mac applications, standard and New UX. New UX is installed on all company computers, standard is for older operating systems.

Outlook Plugin, this allows for easy access to file sharing. If you often send private data, this can also be used to send secure file attachments that meet HIPAA or PCI compliance requirements.

Finally there are links to the application on the Apple Store, Android Store and Windows Phone Store for use on your mobile devices.

Log out

If your using a public computer, make sure you log out when done, otherwise the next person may be able to access or change your files!

Upload

When on the upload page, you can either drag and drop files into the upload OR Click Add Files.

When you click Add Files you can use CTRL or SHIFT to select many files.

When done selecting, make sure you click Start upload and wait for it to finish.



How to access your files

Web Portal

Desktop App – How to use the Desktop App.

Mobile App

Outlook Plugin

Desktop App

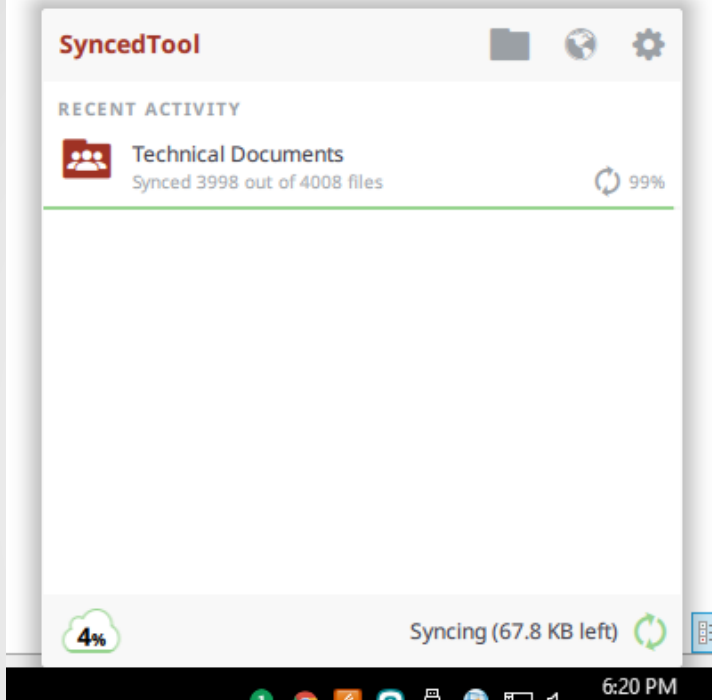
- Supported on Windows and Mac computers.
- Accessible via desktop icon, Computer or Explorer or through your home folder. Look for SyncedTool.
- Synced Files will show a Green Check, Syncing Files a Blue icon and errors a red icon.



SyncedTool also runs in the tray (lower right corner, next to clock) and will show the status with the same set of icons.

- Right-click to see the status or access settings.
- Double-click to access the SyncedTool Folder.

Desktop App – Tray Status



Right click the tray icon to see the status.

This will show the folders syncing, how much space your using and how much data is left to sync.

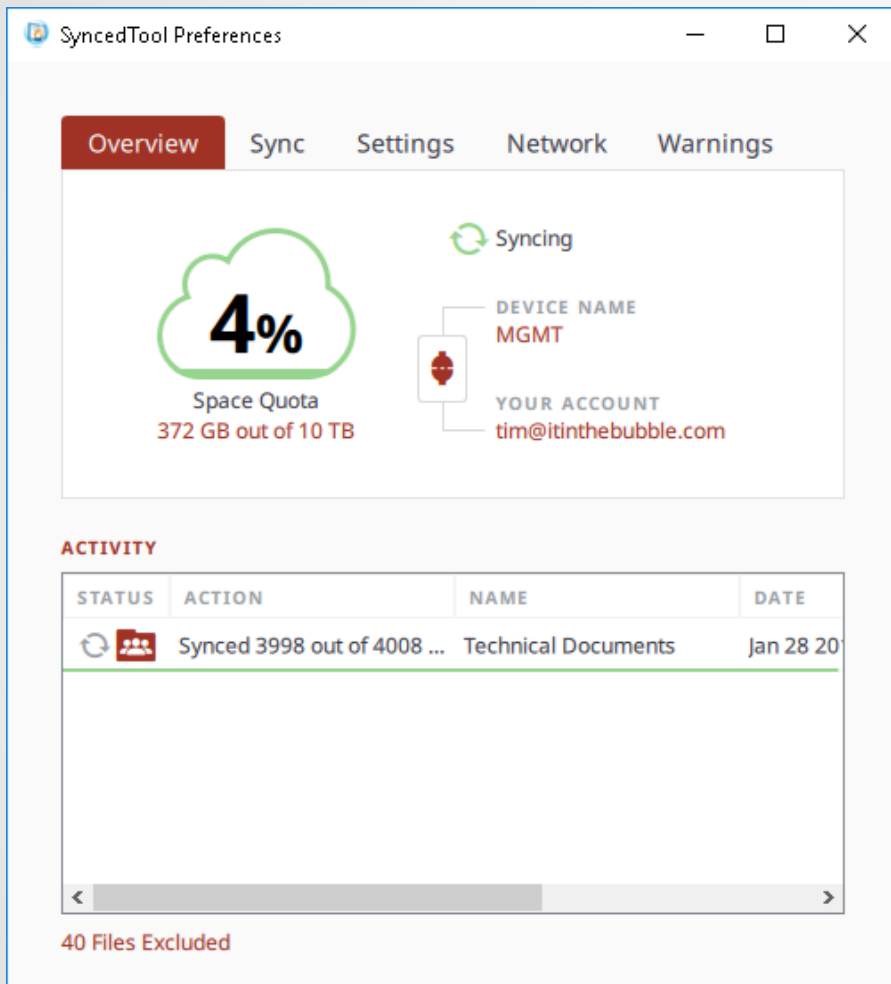
The icons located at the top right allow easy access to...

Open SyncedTool Folder – Primary used location.

Open Web Portal – Rarely used.

Open Settings – Any warnings, Preferences and Exit

Desktop App – Preferences



The screenshot shows the 'SyncedTool Preferences' window with the 'Overview' tab selected. The interface includes a navigation bar with tabs for Overview, Sync, Settings, Network, and Warnings. The main content area displays a '4%' space quota usage (372 GB out of 10 TB) and a 'Syncing' status. Below this, it shows the device name 'MGMT' and the account 'tim@itinthebubble.com'. An 'ACTIVITY' section contains a table with one entry: 'Synced 3998 out of 4008 ... Technical Documents' on 'Jan 28 20'. A scroll bar at the bottom indicates '40 Files Excluded'.

STATUS	ACTION	NAME	DATE
	Synced 3998 out of 4008 ...	Technical Documents	Jan 28 20

Overview Tab

Overview of your usage and syncing status.

Sync Tab

Select or de-select files/folders to be synced.

Settings Tab

Advanced Settings

Network Tab

LAN Sync, should always be enabled, this limits internet usage by syncing with other computers on the network. Bandwidth Throttling, used to limit the speed of syncing.

Warnings Tab

Should be checked regularly for any sync issues. Usually caused by two users updating the same file at the same time. If this happens you can select to replace existing file, save both files or delete local changes. Saving both files is the safest option.

Desktop App – Right Click Function

Within windows, you can right click on any file to access the SyncedTool Context Menu.

Any file or folder outside of SyncedTool can be added to Backups through this context Menu.

Within SyncedTool you have a few more options...

View on Web – Opens the web portal to the folders location for searches, restore of deleted files or revisions, etc.

Share Link – Opens the web portal to the Share settings page, so you can share the file or folder via secure or public share.

View Revisions – Opens the web portal to the files previous versions list.

Lock or Lock For... - This is used to lock changes to files in a folder or a specific file. This will prevent other users from being able to edit files while your making changes. This is not required, but helpfull if you know another user is working on the same files as you, to help prevent double work.



How to access your files

Web Portal

Desktop App

Mobile App – How to use the Mobile App.

Outlook Plugin

Mobile App - Install

Download the app either from the Download link on the web portal OR through the app store. If using the app store, search for **SyncedTool**.

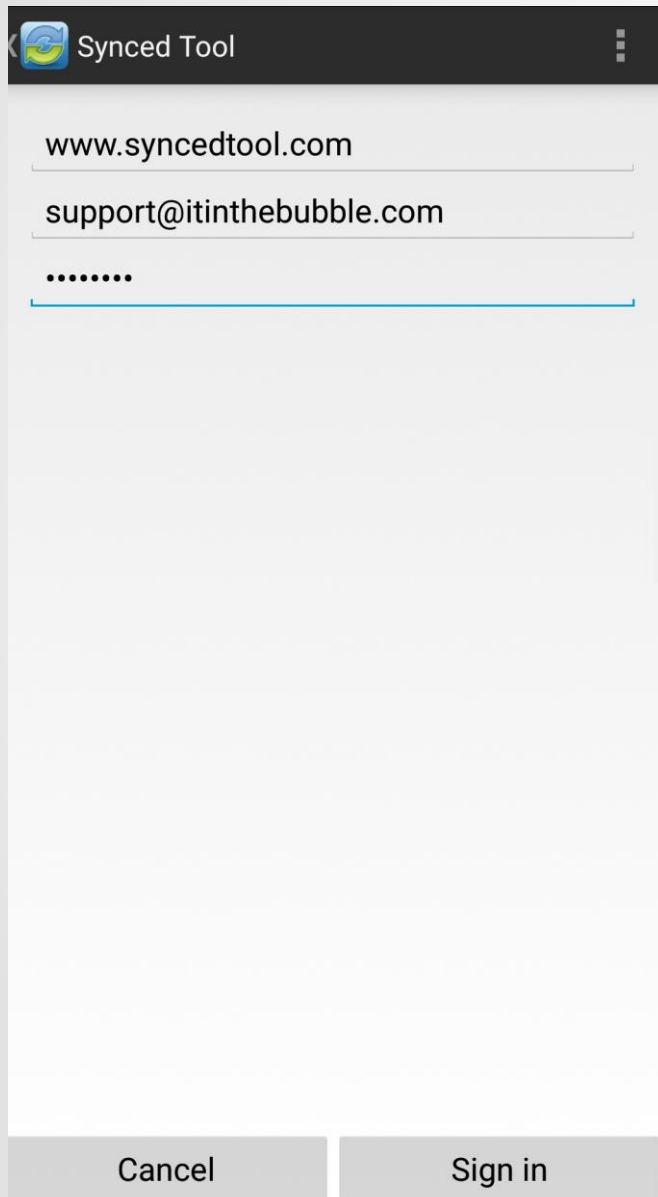
Mobile App supported on any Apple, Android or windows mobile device. Including Cell phones and tablets.

Data can be **remotely wiped** in the event your device is lost.

Data can be downloaded for **offline access**.

Pictures and videos can be **automatically backed** up through cellular or wifi only so you never loose another image!

Mobile App - Login



Synced Tool

www.syncedtool.com

support@itinthebubble.com

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Cancel Sign in

To login through your mobile app.

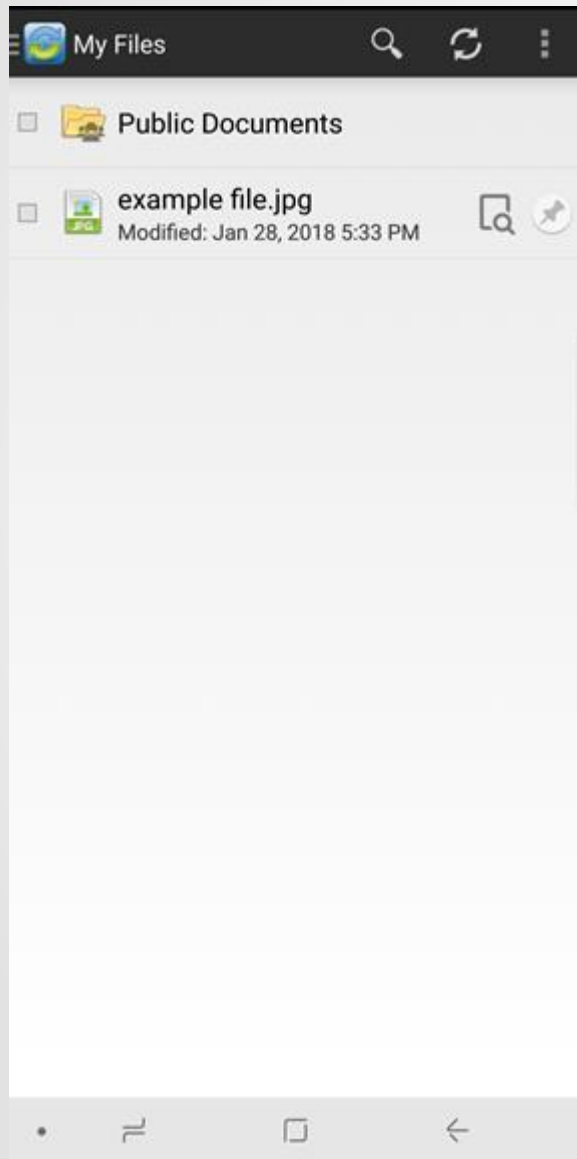
Enter the server name:
www.syncedtool.com

Enter your email address

Enter your Password: **WelcomeFL!** Until changed.

Click **Sign in**

Mobile App – My Files



After login, you will see the files available on SyncedTool, this includes your private files and Team Shares.

Team Shares are indicated by a folder icon with a grey person.

Files support pinning, view only and edit access. View Only does not require any additional apps.

Pinning – When you pin a file or folder, you are storing it as an offline copy on your device. These will be updated when changed by others IF you have internet access.

Icons at top...

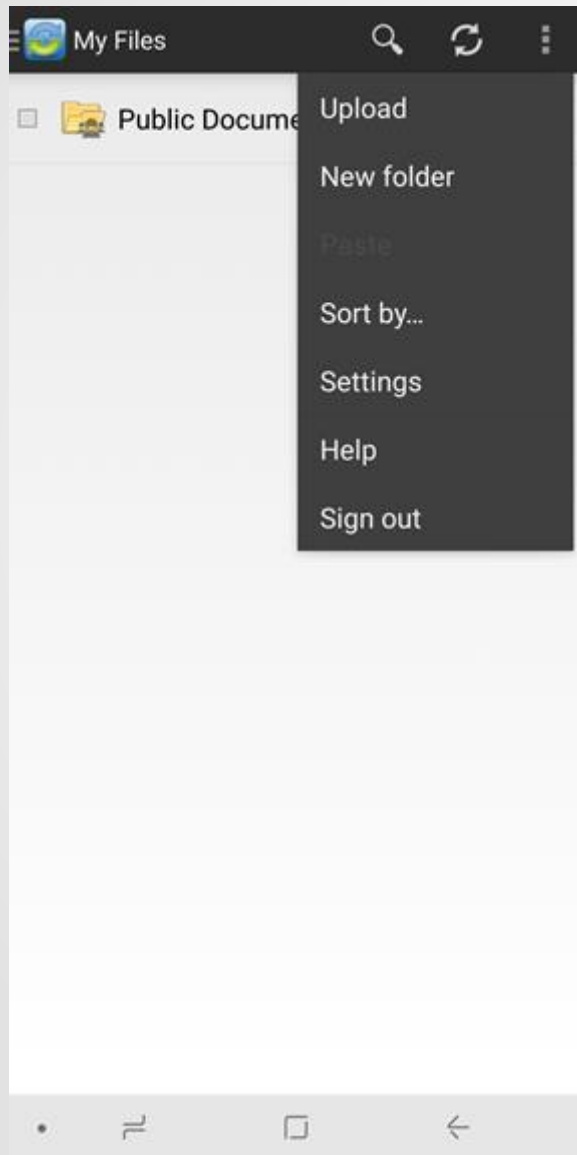
Top Left (Icon and section name) – Go to My Files, Recent Files, Offline Files, Backups and Uploads.

Search – Search the server, enter a partial or full filename.

Refresh – Check for updates right away.

Top Right (three dots) – Upload, create folder, settings, etc.

Mobile App – More Options



Clicking the three dots in the upper right corner, gives you additional options.

Upload – Upload a file in the current folder. Make sure to browse to the location you want to upload first.

New folder – Create a new Folder, NOT a team share.

Paste – If you have a file in the clipboard. Otherwise greyed out.

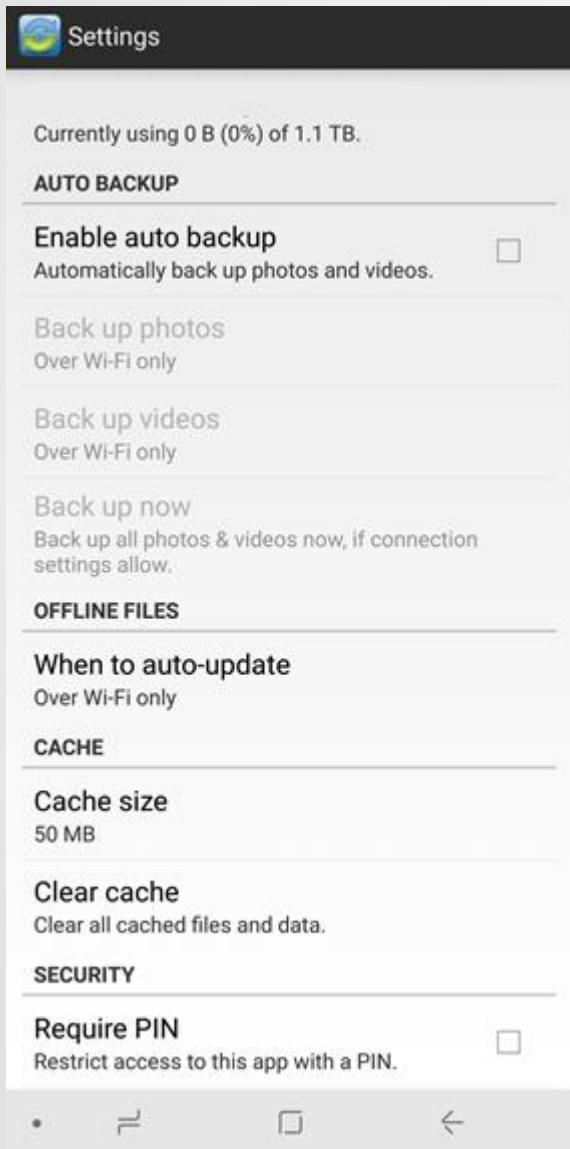
Sort by... - Change the file sorting by name, size, etc.

Settings – More detail on next slide.

Help – Basic help tool, with more details about each section

Sign out – Only if you need additional security, app supports PIN code and remote wipe, so you don't have to constantly login/out.

Mobile App – Settings



Top shows your username and amount of data your account is using and the total amount available through the service.

Auto Backup – Enable picture and video backups. This will backup a picture or video as soon as it is taken or as soon as your on a wireless network, depending on your connection settings. Never loose a picture again!

Offline files – Set this to wireless only, if you have limited data. This selects when offline files are updated.

Cache – Caching will increase the performance of SyncedTool but may require too much storage, if you phone has limited storage, set this to a lower value.

Security – Enable PIN code, set idle timeout and wipe data after X failures. This feature prevents the need to constantly login/out of SyncedTool while still securing your data.



How to access your files

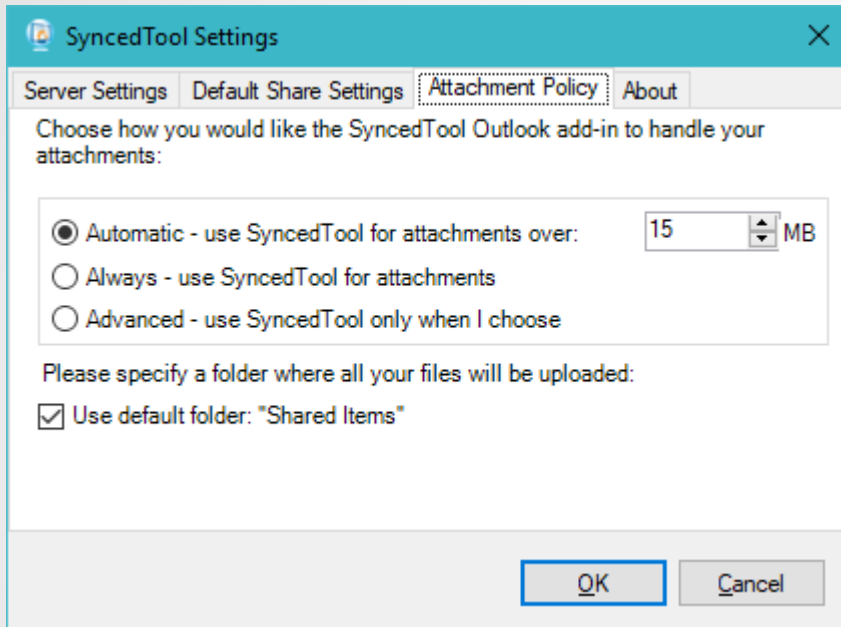
Web Portal

Desktop App

Mobile App

Outlook Plugin – How to use the Outlook
Plugin.

Outlook Plugin



There are four tabs on the Outlook Synced Tool application.

Server Settings – Setup login and password.

Default Share Settings – Here you can set what happens when a file is shared. Including Notify on upload or download, expiration time and public or private sharing.

Attachment Policy is used to select when a file is attached to an email directly or use SyncedTool.

Automatic is best to enable for files over 25MB, this will assure your file gets to end user.

Always will use SyncedTool no matter the type or size.

Advanced will prompt you each time.

With this enabled, you can attach files normally and let SyncedTool take care of sharing for you.

Questions or Help



Further help is available!

Call or E-Mail us as needed.

Visit our website for more training videos and information.

Schedule an onsite training session for your staff.

470-481-0400 option 2

support@itinthebubble.com