How to use Egnyte



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Introduction

Egnyte helps you collaborate on content with anyone inside or outside your organisation in a simple and secure way.

This guide covers all the basics (and more) for storing files in Egnyte and accessing them on any device, anywhere, with ease.

Sign In

There are a few different ways Egnyte can be configured for login. If your Admin chose Egnyte as the login provider, you'll receive an email with your login credentials. If your Admin chose Single-sign-on, you'll receive separate instructions from your Admin.

Let's take a look at the Egnyte login flow.

Once you've received an invitation to start collaborating, click **Accept Invitation**. Your username and the web address where you'll access Egnyte are provided in the email. Once you've created your password and signed in, you'll be able to see the folders and files you have permission to access.

If you did not receive an email from Egnyte or your administrator with login credentials, please reach out to them directly.

Exercise: Sign out of Egnyte, add your Egnyte Collaborate login page to your favorites/bookmarks, and sign back in with your new password. If you have trouble logging in, please contact Egnyte Support.

Manage Your Profile

To access your profile, click your initials (or profile picture), in the top right corner of the screen and then click on your name.

 Q Search for files a ME Michael Elden Power User My Web Sessions (1) 	
My Web Sessions (1)	
Logout	

From here, you can access and update the following settings:



Profile & Insights

View your recent activity, links you've shared, and other information specific to your profile.

My Preferences

Add or change your profile picture, change your password, and update notification preferences.

Exercise: Add a profile picture.

My Devices

Easily see every device that's been used to access the Egnyte domain with your login credentials. If a mobile device is

misplaced, you can force log out of the Egnyte app or remote wipe content downloaded to the device for offline access.

My Web Sessions

Get visibility into all the web sessions you have logged into.

Apps & Integrations

We integrate with many 3rd-party apps businesses use to increase productivity and collaboration. From here, you'll be able to enable integrations available on your domain.

Home

In Egnyte, for every user, there is a default home dashboard on which the user lands when s/he logs in for the first time. This home dashboard consists of two widgets – Recent Files and Bookmarks.

The recent files widget lists the top 50 files accessed by the user sorted by last accessed by default. The bookmarks widget lists all the bookmarked folders for easy access. Apart from these two widgets, the home dashboard also provides an easy way to access the shared files folder and the user's private folder.



Navigation

Navigating through files and folders in Egnyte is easy thanks to the familiar set-up most of us have experienced while using Windows file explorer or the Mac Finder.

There is a main navigation panel on the extreme left followed by a folder tree navigation panel and finally the file and folder listing panel.

Simply select the **Files** option from the main navigation panel and then click on the **folder** you want to open in the folder tree navigation panel. The files and folder listing for the selected parent folder will be populated on the file and folder listing panel.

You can move back to the previous folders by clicking on the **folder name** or the **back arrow** in the folder path. You can also click the back arrow in your browser to return to previous folders in Egnyte. If you would like to return to the home screen, click the **home** icon from the main navigation panel.

Note: Both the main navigation and folder tree navigation panels can be collapsed and expanded by the user as per their preference. The user's preference will be persisted for that user until the s/he explicitly decides to change it.

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If you'll typically be working in the same folder, you can make that folder your new home screen, so you see it upon login.

First, navigate to the folder you'd like to set as your home screen, click More in the top menu and choose Set as the default view. Next time you click the home button or log in, you will see that folder.

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When you're ready to start working on a folder or file check the box or right-click the item. Then, choose the action you need to take.

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Bookmarks

If there are folders you access regularly, use bookmarks to save time. To bookmark a folder, select it and click the **Add Bookmark** option from the action menu. You can also click the bookmark icon next to the folder path.

Exercise: Add a bookmark.

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Policies			Jun 30, 2023 1:16 PM		<a>c Share
Training Guides			Nov 20, 2019 11:09		 Add Bookmark Details & Options

To find all your bookmarks, click the arrow before the Bookmarks folder from the folder tree navigation panel.

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Preview

Simply click on the file link to see a preview in your browser window. You can also preview by checking the box next to the file and choosing Preview from the menu.



Once you've opened the preview, you can use the arrows on the page to preview other files within the same folder.

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Download

Select the checkbox for the item or right-click on the item and select Download from the menu. You can select multiple items to download at the same time as a zip folder.

Note: Changes made to downloaded files will not reflect in Egnyte. Consider making edits in the cloud to free up space on your hard drive.

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Edit in the cloud

Seamlessly make changes to files through Egnyte. Select a file, hover over **Open with**, and click **Edit on your desktop**. The file will open in its native application where you can edit just as you've always done. While you have the file open, it will be locked so others cannot edit it until you're done. We'll talk more about file locking later in the guide. Once you've finished working, simply click save and a new version of the file will automatically upload to Egnyte. No more manually downloading, editing, saving a local copy, and uploading the file to the correct folder just to make a change!

Exercise: Select a file and edit it on your desktop. Make a change and save. Close the file and preview the new version in Egnyte.

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		Get more Apps & Integrations	😪 Share

Share files and folders with links

Sharing files and folders in Egnyte is easy and secure. When you're ready to share a file with a colleague, business partner, or customer, create a customisable link to give them the right amount of access without putting your company at risk. Once you've located the file or folder you need to share, 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.

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From here, you can share the file with the default settings your administrator has set 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.



Who will have access:

- **Anyone**: Anyone you send the link 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 users: Any user that has been set up with login credentials on your domain will be able to access the link. The user must log in to access the link. This works for Admins, Power Users, or Standard Users as long as they've been set up in Egnyte.
- **Specific Recipients**: Only the specific email recipients to whom the link will be sent will be able to access the file or the folder. If the recipients forward the email, the new recipients will not be able to access the link unless they have a one-time code emailed to the original recipient. With this option, only an email link-sharing mechanism will be applicable.

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 choosing the 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.

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Exercise: Share a file with a fellow collaborator. Be sure to change the link options as necessary.

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.

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Lambeau instructions.d	© 0 © 2	14 KB	Oct 30, 2019 2:30 A
Welcome.png	© 0 © 0	23 KB	Sep 28, 2019 3:23

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

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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.

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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.

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Upload

You can upload files directly to the Egnyte server to make sharing and collaboration easier. You can add files by:

Navigating to the folder you need to upload the document to.

Clicking the Upload link in the top menu.

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OR

Dragging and dropping files from your desktop.

Exercise: Upload files to a folder, once by dragging and dropping and once by using the Upload link.



Comments

Comments is one of the many tools Egnyte offers to make collaboration between users a seamless experience. Any user with access to a file can comment on it to communicate a proposed change, updates that need to be reviewed, or bring attention to an important document.

To collaborate with comments on a file, you can either click on the file link and then click **Comments** along the top of the page or select the file and choose **Comments** from the menu.



When you need to get the attention of a specific user, tag them in the comment by typing the @ symbol and their name. Once their name appears, select them from the list and type your message. They'll receive an alert so they know they've been mentioned and will be provided with a link for quick access to the file.



Upload Links

If you have been provisioned with at least Editor permissions to a folder, you'll be able to create upload links. Upload links allow anyone, with or without a login, to add content to Egnyte Collaborate.

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 Collaborate. 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, you can navigate to the folder you want the information uploaded to click Share, and then Request Files from Others.





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thr	ough any other inication metho	od.	Cet Link	OR	Email Link
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Exercise: Create an upload link, send it to yourself, and upload a file.

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

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Egnyte desktop application

The Egnyte 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. Your administrator may have already installed this on your computer, so be sure to check with them before you proceed.

To begin the installation, navigate to **Apps & Integrations** and select **Egnyte Apps**. Once you've found the Egnyte 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.



Exercise: Upload a file through the Egnyte Desktop App.

Apps and Integrations

Egnyte integrates with many 3rd-party apps that businesses like yours use to increase productivity and collaboration. There are certain apps you can utilise as allowed by your Administrator. Some of the most popular applications and integrations are listed below.

1. Mobile App: Access your Cloud data from your mobile device.

2. Egnyte for Outlook Add In: Add links to an email without ever leaving Outlook.

3. **Egnyte for Microsoft Office Desktop**: Enables real-time co-editing on Office Online and Office Desktop applications.

4. **Egnyte for Google Workspace**: Leverage Google Docs, Sheets, and Slides to collaborate on files stored in Egnyte.

- 5. Egnyte for Salesforce: Access and share files in Salesforce and Egnyte.
- 6. 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**.



Exercise: Download an app you commonly access and test the new functionality.



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