

Giving Shape to Ideas





Administrative Console Overview





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We recommend using either Google Chrome, Mozilla Firefox, or Internet Explorer 8, 9, 10, and 11; we also recommend using 1920 x 1024 screen resolution for the best display.







Accessing the Console

Enter your **Company Code, Admin User ID,** and **Password** to gain access to the **Administrator Console**—these are all provided via email.

	FileAssist
Sign In - Business Accoun	t
Company Code	
Admin User ID	
Password	
Remember Me	Login
	Unauthorized use is prohibited ing this site from the following location: 70.116.138.17 IT Administrator, or email support@filesanywhere.com

- A. Quick Add: From the dashboard the administrator can quickly add a user, another administrator, a group, or a division.
- B. Reporting: The drop down menus alter the statistics displayed in the donut graphs below the red box. The admin can view the storage being used, how the users are disseminated into their respective divisions or groups, and the files displayed by size, date, tag, file type, users, and extension.
- C. Account Info: Displays how many user accounts are being used out of the total available amount and below it shows the used space out of the available amount.
- **D. Summary:** This quick summary displays users, folders, files, groups, divisions, and other account information at a glance.
- **E. Notifications:** Displays all actions across all accounts updating every 30 seconds.
- **F. Hyperlink:** The account name is also a hyperlink to the user login portal.
- **G. Eyes:** These buttons hide and unhide the categories.

Dashboard Overview

The **Administrator Console** is an efficient and powerful administrative tool. The new dashboard provides administrators with information about their account at a glance. The different sections of the dashboard have been boxed and labeled to break the information down to bite size chunks. Take a moment to look over the image below and then read the descriptions using the image as a reference.





×



Creating Divisions

🗱 Division Details 💄 Contact User 🙏 Administrator

What are Divisions and why would I use them? Once you have successfully logged into your Administrator Console you can create and edit users, divisions and groups. Divisions are a way of segregating users for easy search, classification, and prevention of shared data. They also allow Admins to specifically monitor predetermined **Divisions** rather than having one person overview all accounts. **Example:** Sam in the Payroll Division can't share his info with Bob in the Support Division. Creating separate divisions allows the users to collaborate with coworkers in their department but keeps the data segregated.

Add Division

Step 1

Click on Add Divisions to start the process of adding a new division to your account.

Follow the instructions below using the guide letters for more information.

- **A. Division Code:** Typically an abbreviation of the Division Name.
- **B. Division Name:** Name of the division (i.e. Marketing or Sales).
- **C. Maximum Users:** Total number of users allowed in division.
- **D. Allotted Storage Space:** Maximum allotted storage space for the division.
- **E. Share Permissions:** If users are able to create GroupShares and with whom.
- F. Sharing with All: Allows users to create GroupShares with individuals.
- **G. Sharing with Division:** Allows users to create GroupShare[™] with others in the division.
- **H. No Sharing:** Disallows any GroupShares from being created by users in the division.

Step 2

The **Contact User** is the main contact and head of the division. Fill out the **Contact Information** and then click **Administrators** to the right of the **Contact User** tab to continue.

	Add Div	rision			×
🕮 Division Details 🚺 Contact User 🤱 Administrator	S				
CONTACT INFORMATION					
Name	Last Name		Email		
Mobile Number	Office Number				
CONTACT LOCATION					
City		Select a State (U.S. Only)		÷	
Zip Code		Country			
Cancel				Previous Next	Save

GENERAL INFORMATION

Division Code

Description

ACCOUNT SETTINGS

Nammum Users

Vision Code

Vision Code

Nammum Users

Vision Code

Standary with All Sharing with Division No Sharing

Sharing with All Sharing with Division No Sharing

Carcel

Previous

Net

Starting with All Sharing with Division No Sharing





Step 3

A. Click to Add Administrator to Division.

B. Division Administrators will appear here.

C.	Click	Save	to	complete	Division	creation.
----	-------	------	----	----------	----------	-----------

				Add D	livision	×
III D	Division Details 🛛 💄 Co	ontact User	Administrators			
Select a	dministrators for this divis	ilon:				
Search	h an Administrator			22	Add Administrator to Division	
	Administrators Name	Permission Role	Created On			
No ad	Iministrator found.	В				
Remo	ove Selected					
Remo	vve Selected					
Remo	vve Selected					
Remo	vve Selecced					Previous Save



Creating Groups

What are Groups and why would I use them? A Group can designate certain sharing rights and privileges to any user within the group. If you add a new user, they will inherit the Group's rights and permissions, yet if you remove a user they will have the same rights and permissions removed.

Example: Steve is added to the Marketing Group and his account automatically has his shares and permissions setup. James moves from Support to Sales Group and his old setup is removed and the new setup is automatically created.

Adding a New Group

Now we'll move on to Group creation. Click **Add Group** to continue. Starting with the **Group Details** enter a **Group Name** and assign the group to a division (Select Division).

Add Group	×
🛃 Group Details	
GROUP INFORMATION	
Group Name	Y
DIVISION	
Select Division 🗘	
Cancel	Next > Save





Step 2	The sharing section denotes what shared folders the group members can access.	A Change Heart Type in the year
	Add Group X	or select them using the button to the right of the field.
	Select user name of shared folder: Select folders that new user can access: Assign a Permissions: Chonce Lister Chonce Lister Full Access Full Full Access Full Full Access Full Full Full Full Full Full Full Full	B. Choose Folder: Select that user's folder you want the group to access.
	Shared By Shared Folder Permission Shared On No shared folder found. E	C. Assign a Permission: Select the permission type you want.
		Read Only: Users may only download a read only version of document.
		Full Access: Users are able to fully utilize all features of the account.
Step 3	Now you can add users to the group. Type in their Username or click the button to the right of the Choose User Owner field and then click Add Member. All of the group's users will appear below.	Create and Update: Users are only able to create new documents and update preexisting files.
	Add Group X	Master Access: User has no restrictions.
	Group Details Sharing Members	D. Add Shared Folder: Click this button to Add the Shared Folder.
	Choose user owner	E. No Shared Folder Found: This section
	Username First Name Last Name Status No members found. Very Status Very Status Very Status	will display all folders that are being shared.



Step 1

Creating Users

What is a User and why would I use it? Users are created for everyone that will use the service to store, share, and collaborate with others. Each of the users can be assigned specific folders and their permissions are unique to the user which allows a flexible and form fitting profile for each person.

Example: Sam has 2 GB of personal space and has **read only** access to Jamie's shared folder. Sam is able to view and download **read only** versions of the files, but is unable to upload or modify the files.

Adding a New User

To begin the user creation process click the **Add User** button. The new user creation page will appear as below; follow the steps and use the pictures as a guide to complete the user creation. Under the **User Details** section fill out the user's Personal Information.

💄 User I	Details	PERSONAL	First Name	Last Name
User V	View Settings	INFORMATION		
Advar	nced		Email	Phone
₩ Plugir	ns			



Step 2	Now enter a Username and Pass password for this new user.	sword for the account. Clicking the crossing arrows will generate a random
	USERNAME	Username
	a rasholo	Password Confirm Password
		Do not send password ⑦ Do not email details to user V User must change password on next login
1		
Step 3	Select the Division and then assi	gn Personal Storage Space if desired.
	DIVISION	KMPROJECTS \$
	STORAGE SPACE	Assign Personal Space
Step 4	This section is used to assign sha to share with the new user, select	red folders to the new user. Choose the user, select the folder of theirs you would like a permission, and click Add Shared Folder.
	FOLDER SHARING	Select user name of shared folder: Select folders that new user can access: Assign a Permissions: 3
		Choose User 🖭 Choose Folder 📷 Full Access 💠 🗮 Add Shared Folder
		Shared By Shared Folder Permission Shared On
Step 5	Use this section to add the new us	Remove Selected Seer to a Group . Search Group Group Mame Members Shared Folders No Groups found.
1		Remove Selected
Step 6	Add any notes regarding this user	in the Notes section.
	NOTES	Notes Å



Step 7

Under the **User View Settings** the admin is able to set the visual settings of the user account like the default **Interface Setting, Interface Option,** and **Time & Language.**

The recommended selections for the **Interface Setting** are labeled **(A) New** and **(B) Tree View.** The **Interface Option** and **Time & Language** can be changed per preference, though the user will be most impacted by the top two recommended selections.

L User Details	INTERFACE SETTING	Default interface: Default view: B List View Options:
🖵 User View Settings	4	New Classic List view Icon view Tree view Hover Image visibility
錼 Advanced		View Type: ③
다. Plugins		Standard Custom View
		Starting Dage After Login
	INTERPACE OF HON	My Documents \$
		File/Folder Default Sorting:
		Name \$ Ascending \$
		Folder Tree:
		Show GroupShares on Top
		Tree View Settings:
		Show Empty Folder Icon
	TIME & LANGUAGE	(UTC-05:00) Eastern Time (US & Canada)
		Language
		English \$

Step 8 The Advanced settings are (A) recommended left unchecked and (B) checked. Note: WebDAV Access and FTP/SFTP will not register in the history tracker, so if you want to see every action across all accounts do not enable either WebDAV or FTP/SFTP.

User Details User View Settings Advanced	USER SETTINGS	Do not allow User Profile updates Automatically purge user files ③
ψ Plugins	REMOTE ACCESS PERMISSIONS B	Allow WebDAV Access Mow access to FTP/SFTP and Remote Backup Pote: When both FTP/SFTP and WebDAV are disabled, there will be no additional way for the user to gain access to data other than the Web application.

Step 9

The **Plugins** section is where the Administrator can **(A)** enable and disable Service Plugins and **(B)** make modifications to the plugin itself.

1 User Details	SERVICE PLUGINS	iR .	Fax Service	A	ON
🖵 User View Settings	P.		Paperless faxing! Send and receive faxes entirely by web, using your account. Fax any standard document or graphic file. Receive faxes using a dedicated fax number	_	
🗱 Advanced			ariu view an laxes unime.		
🖞 Plugins			Sending Faxes Receiving Faxes		

Now you're done creating the user. Repeat this process until all the users are created (and customized if necessary).

Quick Tip: Using the search bar will alter the infographs—Administrators can type in a **Username** and all of the infographs will reflect information regarding that specific user.







Creating Administrators

What is an Administrator and why would I need one? You can create additional

Administrators that can manage the entire account or pre-selected Divisions, allowing you

more time to complete other tasks.

Example: Richard is the account's **Administrator** and is able to set permission levels for all users and new **Administrators.** Each additional **Sub-Administrator** is created with customized permission levels; Peter is an **Administrator** for the Marketing Division and is only able to add, edit, and delete user accounts.

How to Add an Administrator

addressed in our Knowledge Base articles.

Click Add Administrator to create the Administrator. The first page will ask for the contact information, their Username, and a Password.

	Add Administrator	>	\$
Admin Details Permissions III Divisions			
CONTACT INFORMATION			
First Name	Last Name	Email	
Phone Number	Fax Number		
USERNAME & PASSWORD			
Username	3		
Password	Confirm Password	×	
Do not send password ③	Do not email details to admin	Admin must change password on next login	
STATUS			
✓ Active ^û Locked Ø Disabled			
Cancel		Next ► Save	
The Permissions and Divisions tab offer	more customizability, however these adva	anced features are	





Security

The Security page allows the Administrator to manage password requirements, Username requirements, login attempts, and **FileShare™** settings.









Site Configuration

Similar to the Security page, Site Configuration contains settings that affect all users.



These global settings allow the **Administrator** to optimize the default settings (i.e. sharing, display, plugins) for the users to better suit their and the company's requirements. Be aware that the **Site Configuration** affects all new users; new users will inherit all permissions denoted in this section.

Site Configuration					Save Site Configuration
X General Image: New York Sections Image: New York Image: New York Sections Image: New York Sections Image: New York Sections Image: New York Sections	STORAGE SPACE	Storage Space section only applies to new assers Storage Size: Only Ga Days Storage Size: Only Ga Days Storage Storage Size: Only Ga Only Ga Storage Storage Size: Only Ga Storage St	vefaults verp Netflexian: 1 2		x
	EMAIL ROBOT	Dudde Snaf Actor: Baam Morg			
	OPTIONAL FEATURES	Lock User Profiles Allers General Link Elizable comments for file and folders Disable Inactive users:	Allow cares to GroupShare Make cares to GroupShare Make cares to GroupShare Make cares to Enable Rugine Inside if Address Tracking on Fieldnare/Fieldcove L	Inable Forget Password Onable Picture Link Log All Download Activity	
					Save Site Configuration

This quick introduction does not cover every aspect or feature of the new and improved Administration Console, but it should get you started. If you have any questions or need something explained you can always contact our U.S. based support line at 1(800)-456-5664 (prompt 1, 3). For complete information on Konica Minolta's FileAssist solution please visit: <u>www.file-assist.com</u>



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