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# Triofox Web Portal Guide

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Triofox Server Version 13.4.9785.53973

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# Getting Started

## Introduction

Welcome to the Triofox Web Portal User Guide. This guide describes the functionality of the web portal for Triofox users.

Triofox helps businesses mobilize their file servers by enhancing existing Windows file servers with secure remote access, mobile file sharing, data protection and cloud migration, while addressing business concerns about security, privacy, compliance, and control.

Triofox adds ransomware protection and automatic alerting mechanism to your file servers. It continuously monitors all Triofox clients for unusual activity and automatically shuts them down when it detects a potential attack.

With Triofox, companies no longer need to rely on a VPN or a corporate computer to securely access files. Triofox eliminates data sprawl by keeping data on local file servers, and balances mobile productivity with centralized management and access control.

Triofox integrates natively with Active Directory and retains all existing NTFS permissions, eliminating the need to create new user identities. With military-grade encryption and secure connections, you can leverage existing users and permissions, saving time and money during setup. Files remain on local file servers and are encrypted in the endpoint cache.

Triofox includes the backend Triofox server running on the Windows Server platform, front-end client applications for Microsoft Windows, Mac OSx, and mobile clients for Android and Apple iOS operating systems.

The Web Portal is an integral part of the solution for the following reasons:

- most of the management work is done on the web portal.
- downloading other native client agent software starts from the web portal.
- web browser file manager has a rich and responsive feature to manage files, sharing, and collaboration.

Other essential features and functions of the web portal are also covered in this document.

## Browser Requirements

The web portal runs inside compatible web browsers. We recommend using the following web browsers.

- Google Chrome (Latest)
- Firefox (Latest)
- Safari (Latest)
- Windows Edge (Latest)
- Opera (Latest)
- Internet Explorer (11)

### **Warning**

For administrative work, the Web Portal no longer supports Internet Explorer 8.

### **Note**

Google Chrome and Firefox have self-updating features, so in most cases you use the latest version. It is OK if these web browsers are not the latest as long as they were released after 2011.

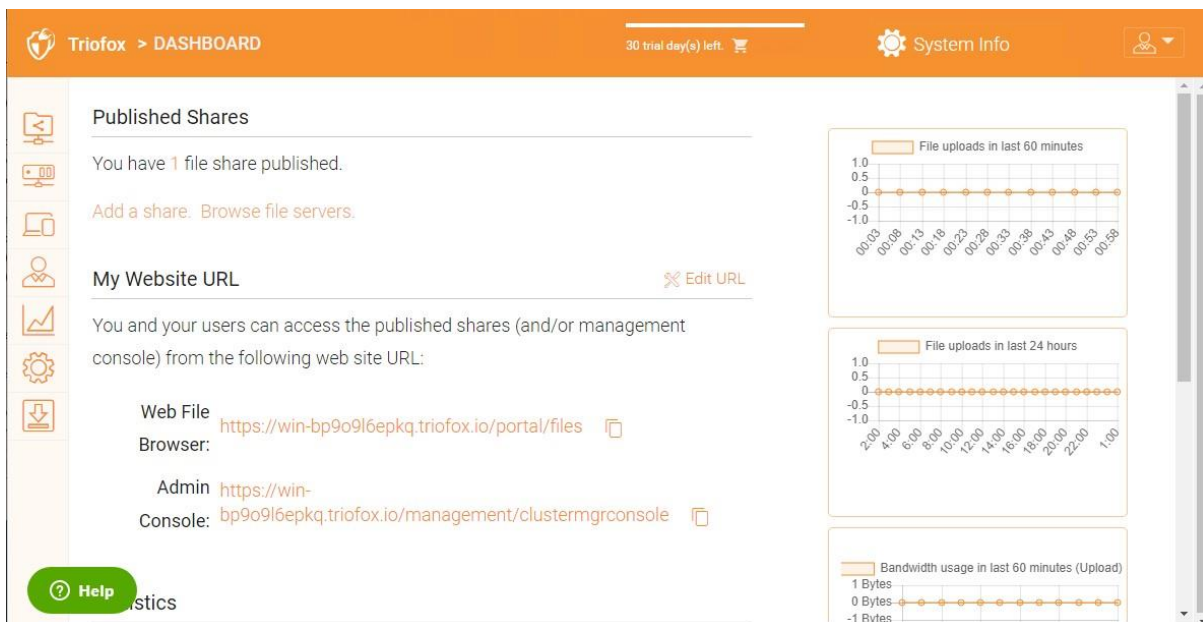
For the best user experience, we recommend the latest version of the web browser.

# Different Scope of Users

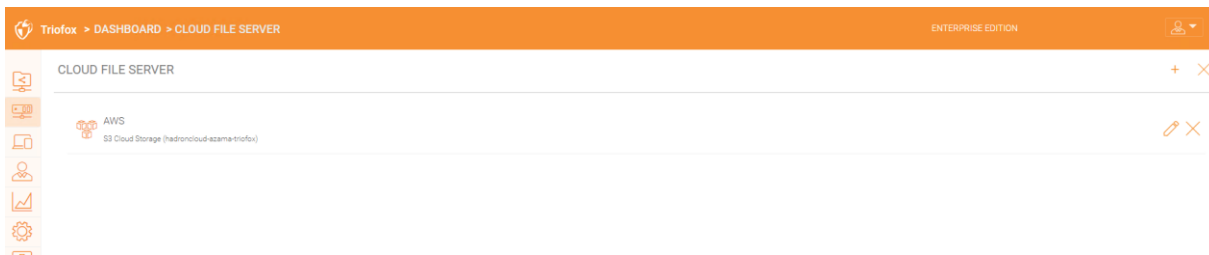
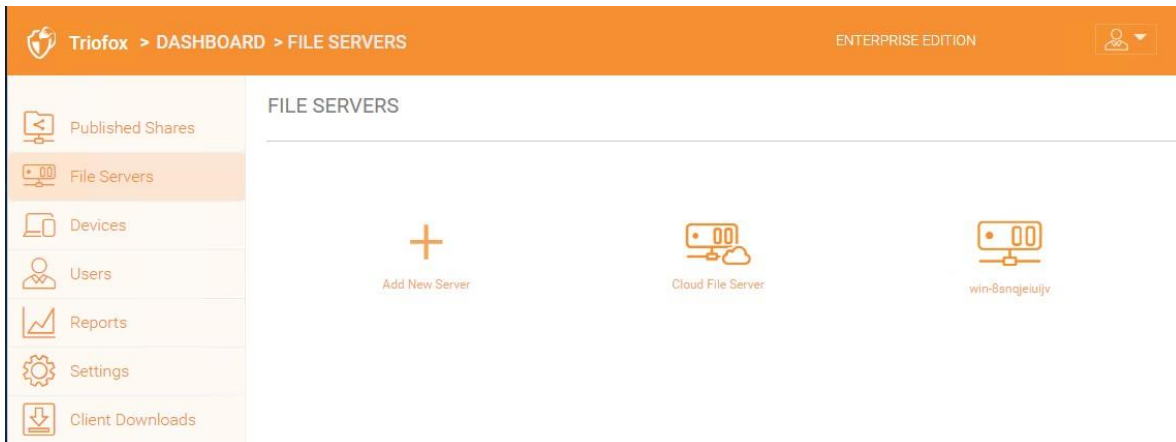
## Administrator

Administrator is a management scope that typically maps to a company or a group of users collaborating on a set of documents. In Triofox, it is referred to as the Cluster Administrator count as well.

In this scope you can see the published shares, your website URLs, system statistics, reports, and other aspects that help you manage your solution.



Access File Servers to manage all servers and their respective shares.



## Delegated Administrator

A delegated administrator is a normal user most of the time. However, delegated administrators can be elevated to cluster administrators by adding them under System Info -> Administrators. To create this type of administrator, follow these steps as Cluster Admin. Click the "System Info" icon in the upper right corner. Then select "Administrators".



Then add the user email address(es) for additional cluster administrators

The screenshot shows the Triofox Administrators page. The breadcrumb trail is "Triofox > DASHBOARD > SYSTEM INFO > ADMINISTRATORS". The page title is "DEFAULT ADMINISTRATOR". There is a 30-day trial notice. The page lists the following administrators:

Name	Email	Actions
Cluster Admin		EDIT
	ahsana@triofox.com	EDIT RESET PASSWORD

Below the list is a field for "Additional Cluster Administrators (add other users to administrators) (email1;email2):" with an "EDIT" button. A red dashed arrow points to this field.

## Native User

Native users are users that have credentials to log into Triofox and are not in Active Directory. They can be added manually under Access Control for various folders to grant them access.

## Active Directory (AD) Users

AD users are users who are added once you have integrated Active Directory into your Triofox environment. You can add users via groups in your Active Directory domain controller or you can add individual users.

## Web Portal Login

To get started, point your web browser at the Triofox server.

If you are the system administrator for the Triofox server and are in the server's console, you can point your web browser to `http://localhost`.

If you are on the Local Area Network, you can point your web browser to the IP address of the Triofox server - `http://<ip-address>`

Usually and in production, you will point your web browser to the DNS name of the Triofox server, e.g. `https://<DNS-Name-Of-Server>`

Once you are in the web portal, you will first see the login page.



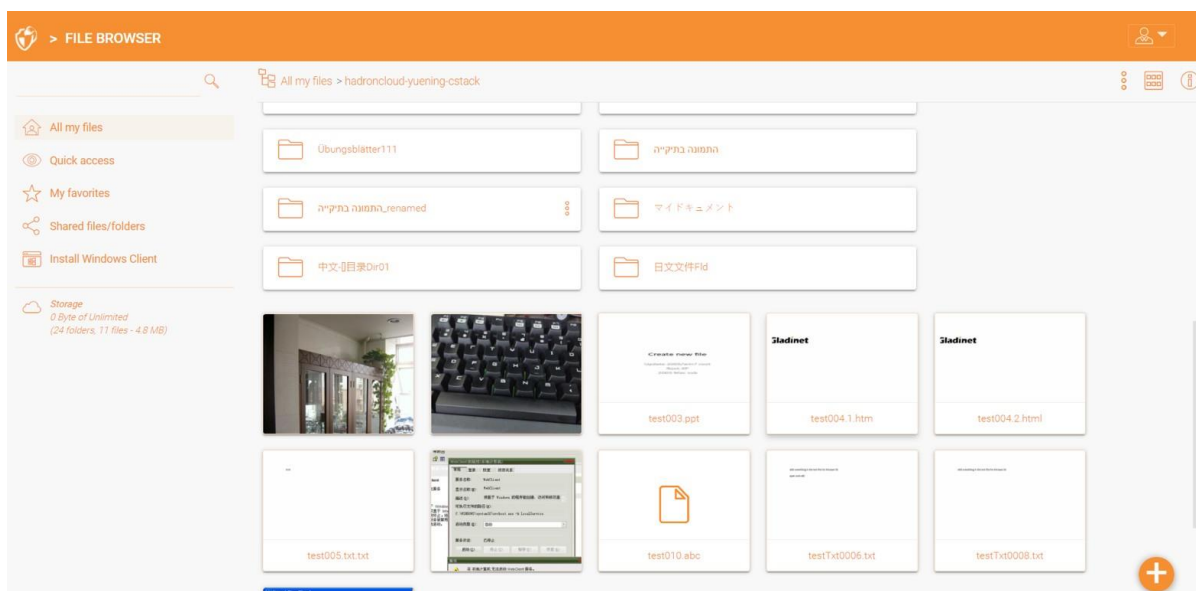


## The Web Interface

The web client interface has three panels from left to right, the left tree panel, the middle

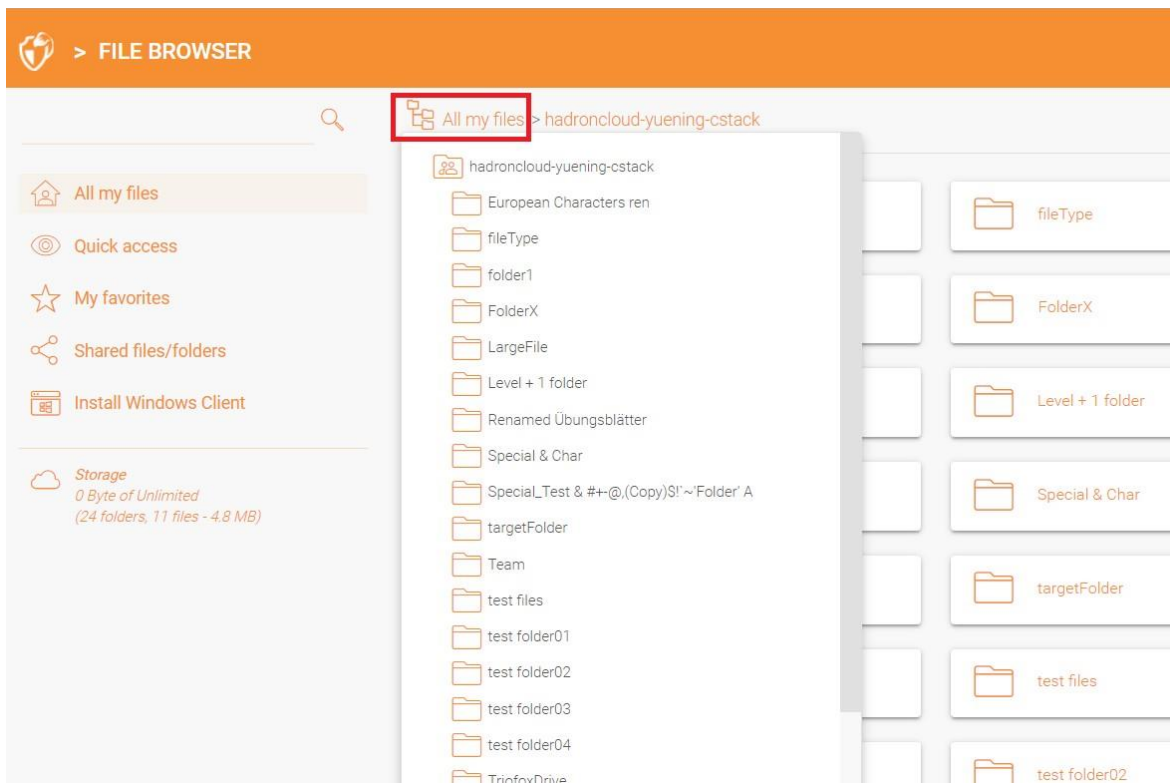
file and folder panel, and the right information panel. Many of the management functionality are done over the web portal. The web client also has the files and folder's view.

### Normal Web Portal View



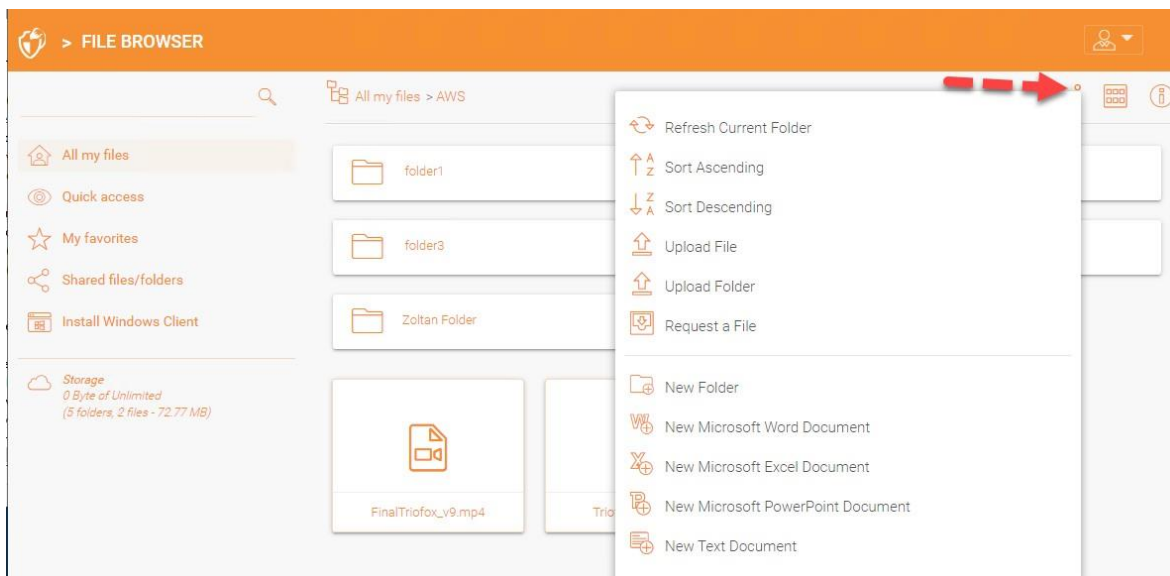
### Left Tree View

The left-tree view can be toggled by clicking the tree icon.

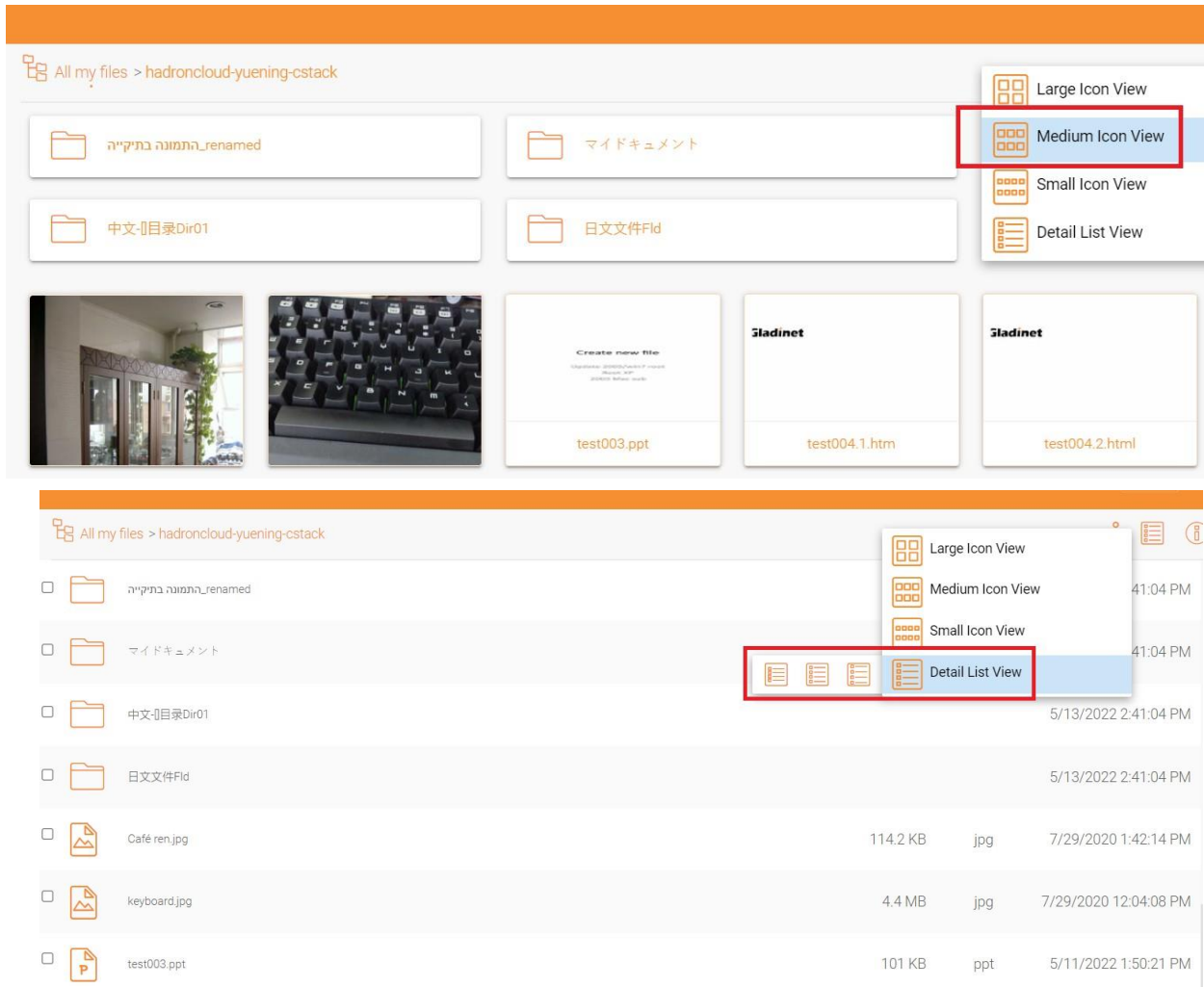


## More Actions

You can click on the three stacked dots on the top right to see more options, e.g., upload file or folder, create a new file or folder, etc.



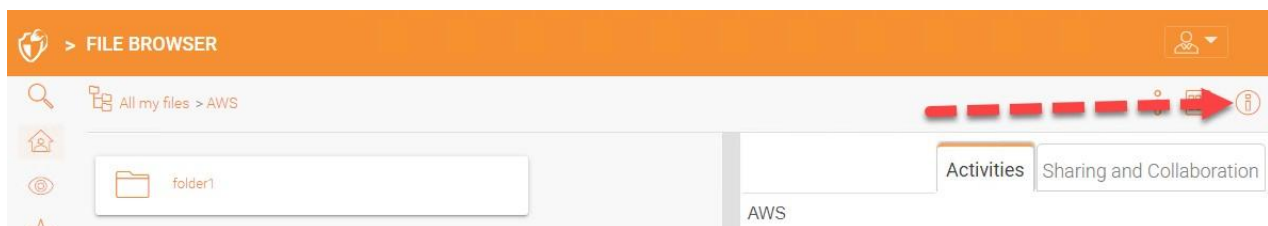
## Switch between Icon and List view



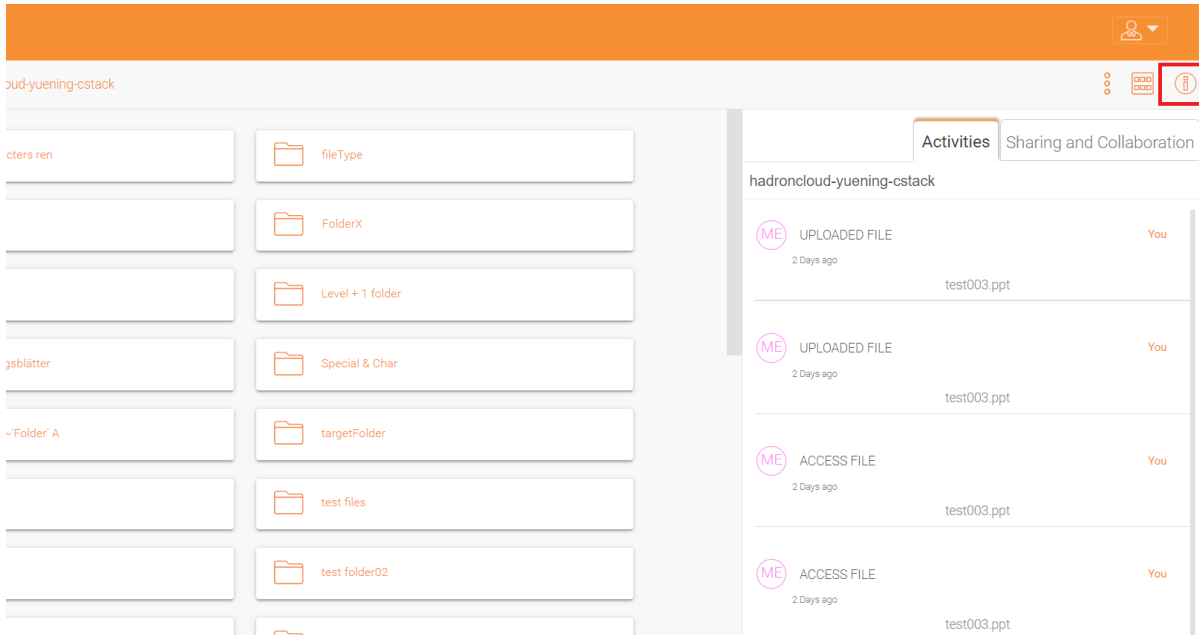
If you switch to the list view, you get detailed information about the file.

## Right Info Panel

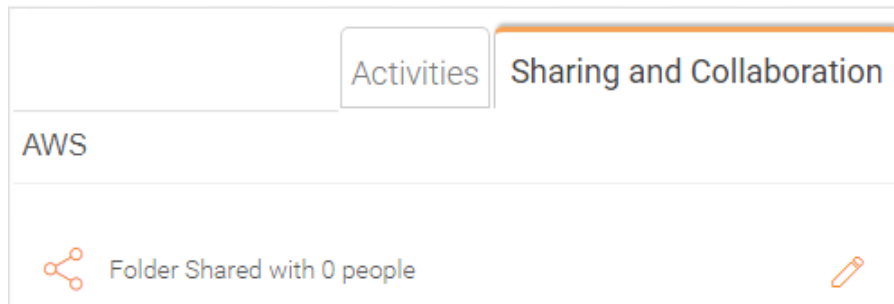
You can access the Info Panel by clicking on the (i) icon in the upper right



All current activities regarding the content are displayed here.



The “Sharing and Collaboration” tab displays the list of existing shares for the file or folder, and if it is a folder the devices is linked to.



## Icons in Web Interface

After you log in, you will see all the folders and files you have access to in your web portal file browser. The folders can be on the local file server on your company's network or folders for files in the cloud, for example, Amazon AWS S3 or Microsoft Azure Blob.

There are many different icons in the web interface. Here is a list of them.

### Folders

#### Mounted Storage



This folder represents mounted/attached storage. For example, a mounted file server network share or a connected Amazon S3 bucket looks like this.

#### Sync From Remote



This folder represents synchronization folders from remote PCs or Server Agents.

#### Received Shares



This folder represents the root folder of all the shared files and folders from other users.

#### Regular Folder



This folder represents a regular folder.

## Other Icons

Upload File/Folder



New Folder



New Word Document



New Excel Document



New PowerPoints Document

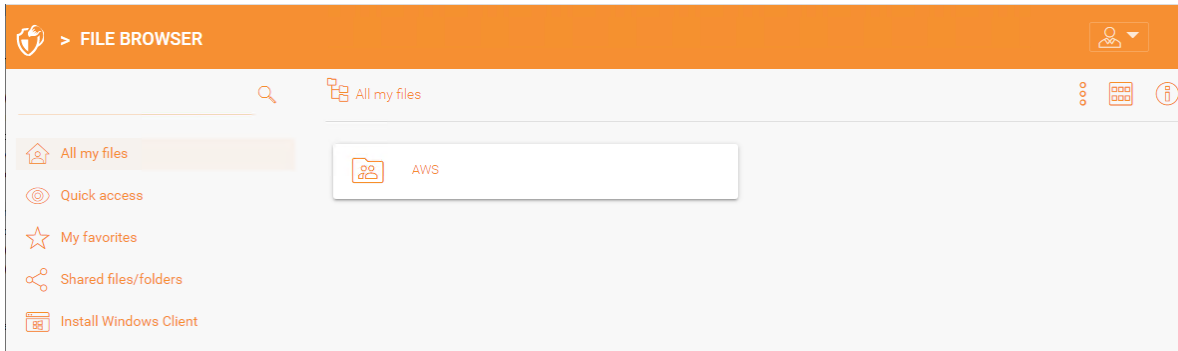


New Text Document



# File Browser

You can double-click any folder to see all subfolders and files inside.

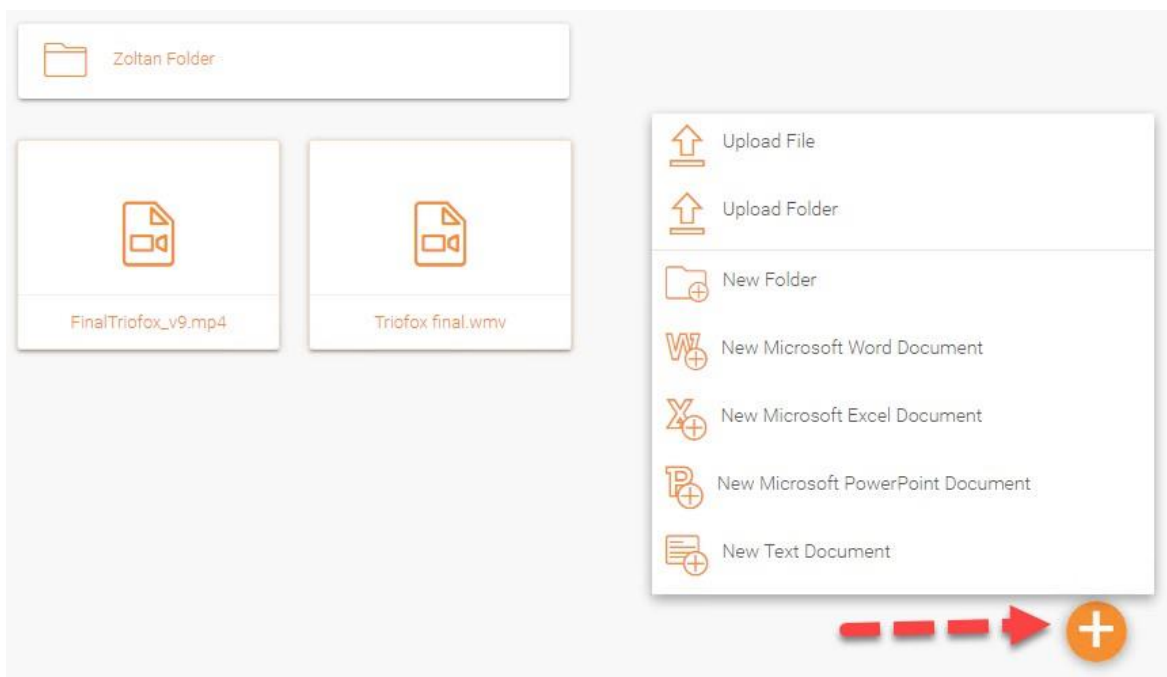


The file browser view has some additional options on the left panel, which are listed below:

- All my files, displays all files and folders.
- Quick access, displays all files that have been accessed recently.
- My favorites, displays all files that have been marked as favorites.
- Shared files/folders, shows all shared files and folders.
- Device backups, displays all devices that have been backed up.
- Install Windows/Mac client, once clicked, it will open a window to download the client.

## Plus Icon

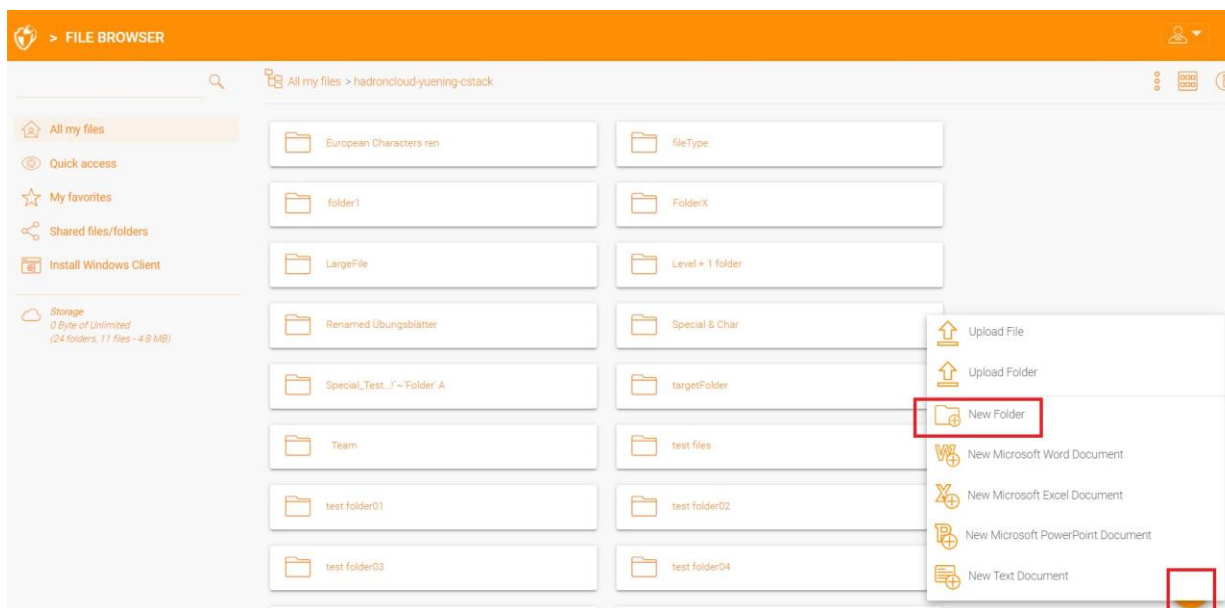
You can also use the plus icon at the bottom right to see more options, such as upload a file or folder, create a folder, and new documents.



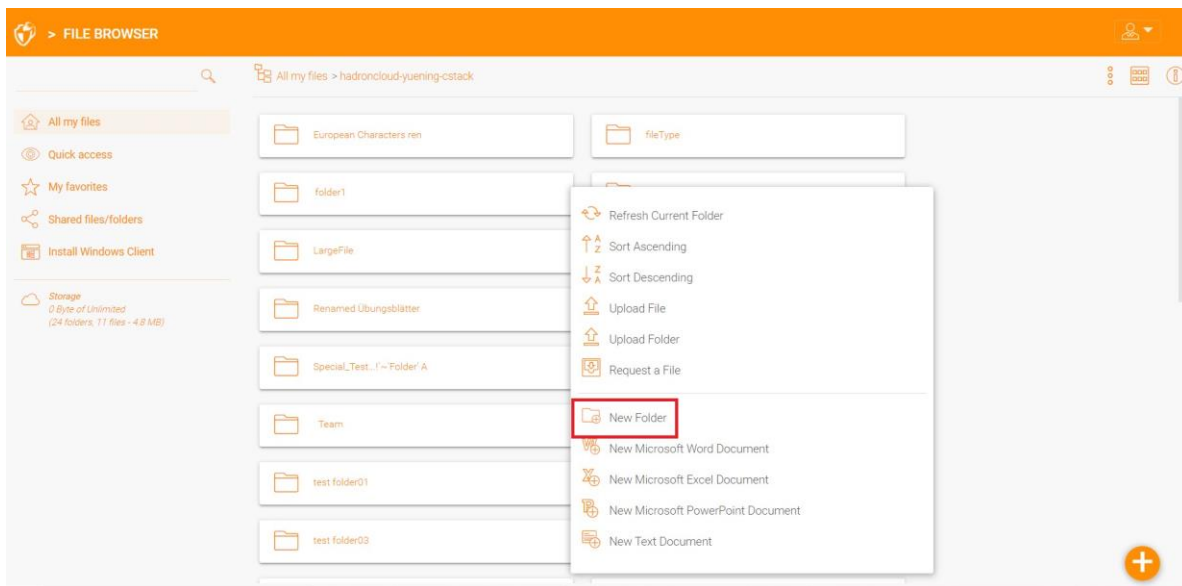
## Create Folders

You can create folders in Triofox web portal.

To create a folder, go to the parent folder and click **New Folder** in the drop-down menu or right-click in the folder background and select **New Folder** in the context menu.



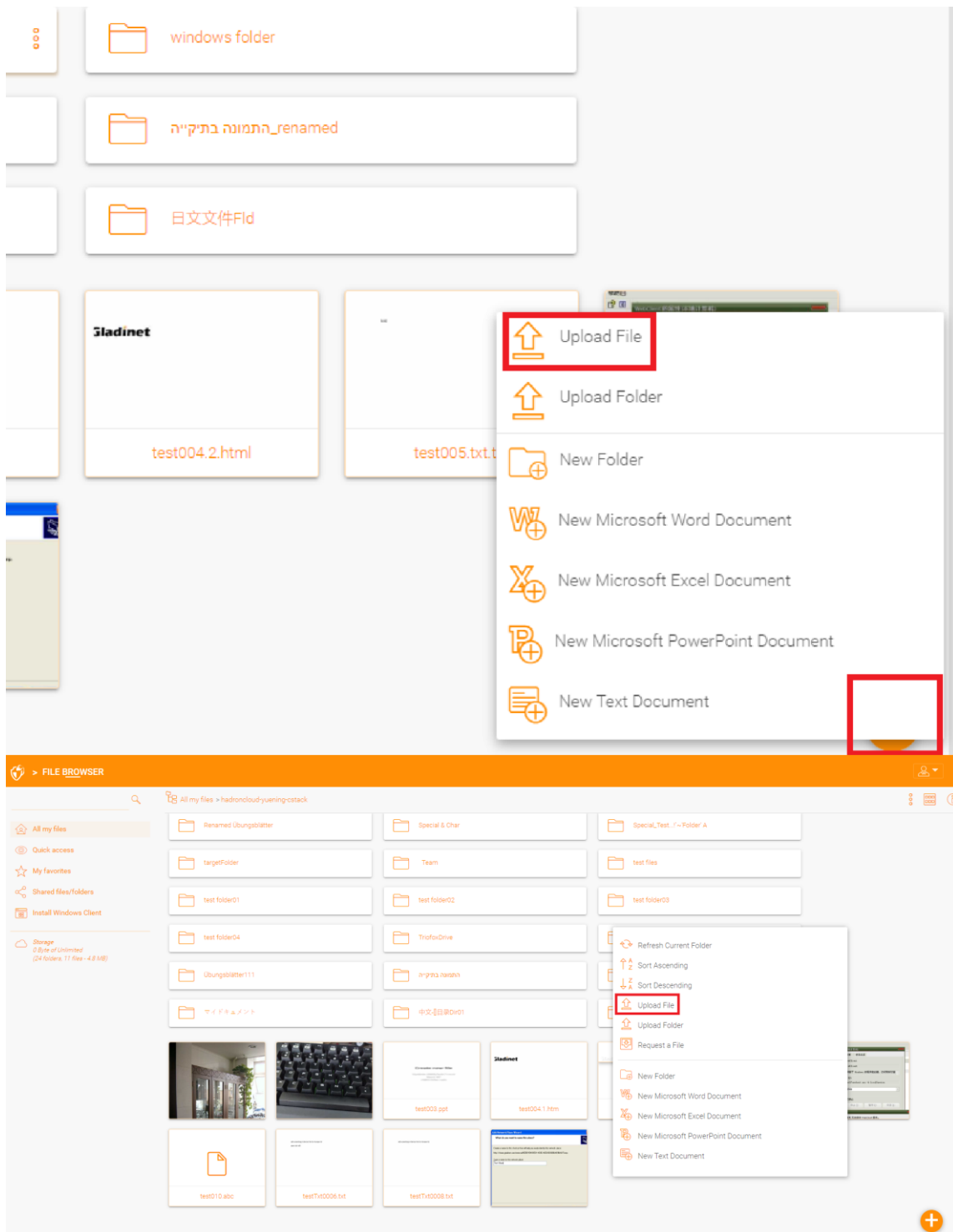




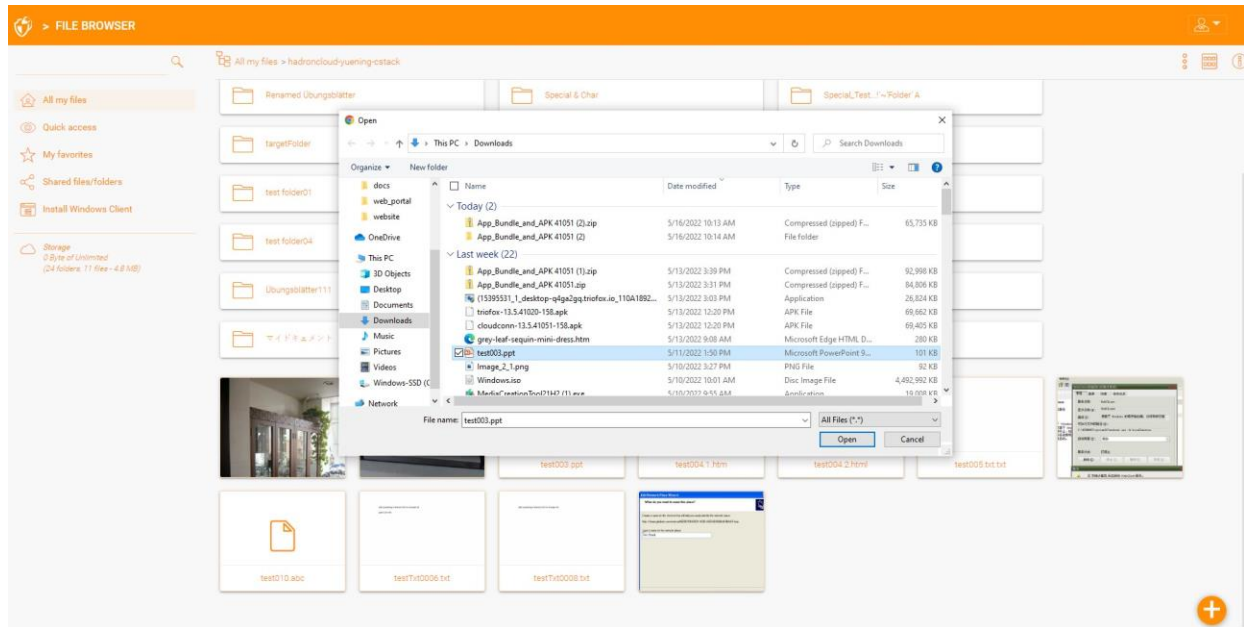
## Upload Files/Folders

In Triofox, you have various options for uploading files and folders. Using the "Upload file" option under **Upload**, you can upload one file at a time. Using the option "Upload folder" under **Upload**, you can also upload folders. Last but not least, you can also use the "Upload Folders and Files" option to upload multiple files at once, or you can drag and drop files from a local desktop to the Triofox Cloud web portal to start the upload.

It is possible to upload multiple files at once. This is supported by all browsers. The same applies to the **Upload Folder**. To access these options, click on the "+" icon (1) or right-click on the portal background (2) and select your upload option there.

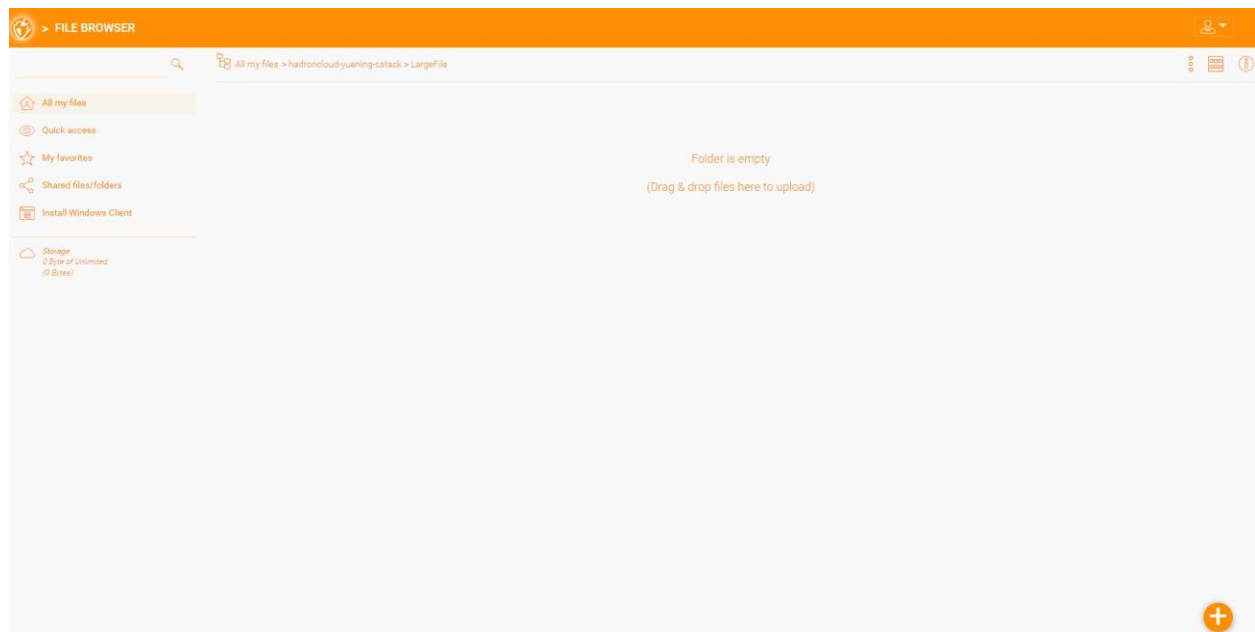


After clicking on the upload option, you can browse to the file or folder you want to upload. Use the Ctrl key to select multiple items.



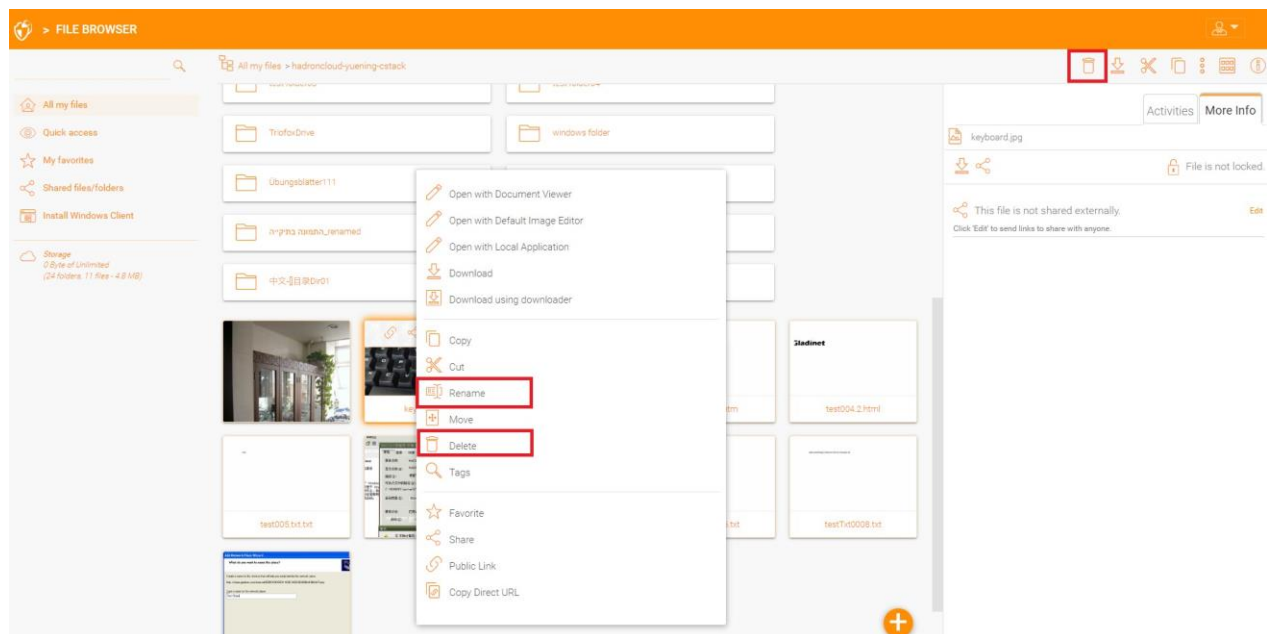
## Drag and Drop Upload

Latest web browsers that support HTML5 drag and drop upload will see "Drop Files Here" in an empty folder. These web browsers allow you to drag & drop multiple files directly into the Triofox Cloud. In the latest Google Chrome, Drag and drop folder is also supported, while the other HTML5-based web browsers support drag and drop of multiple files.



## Renaming/Deleting Folders

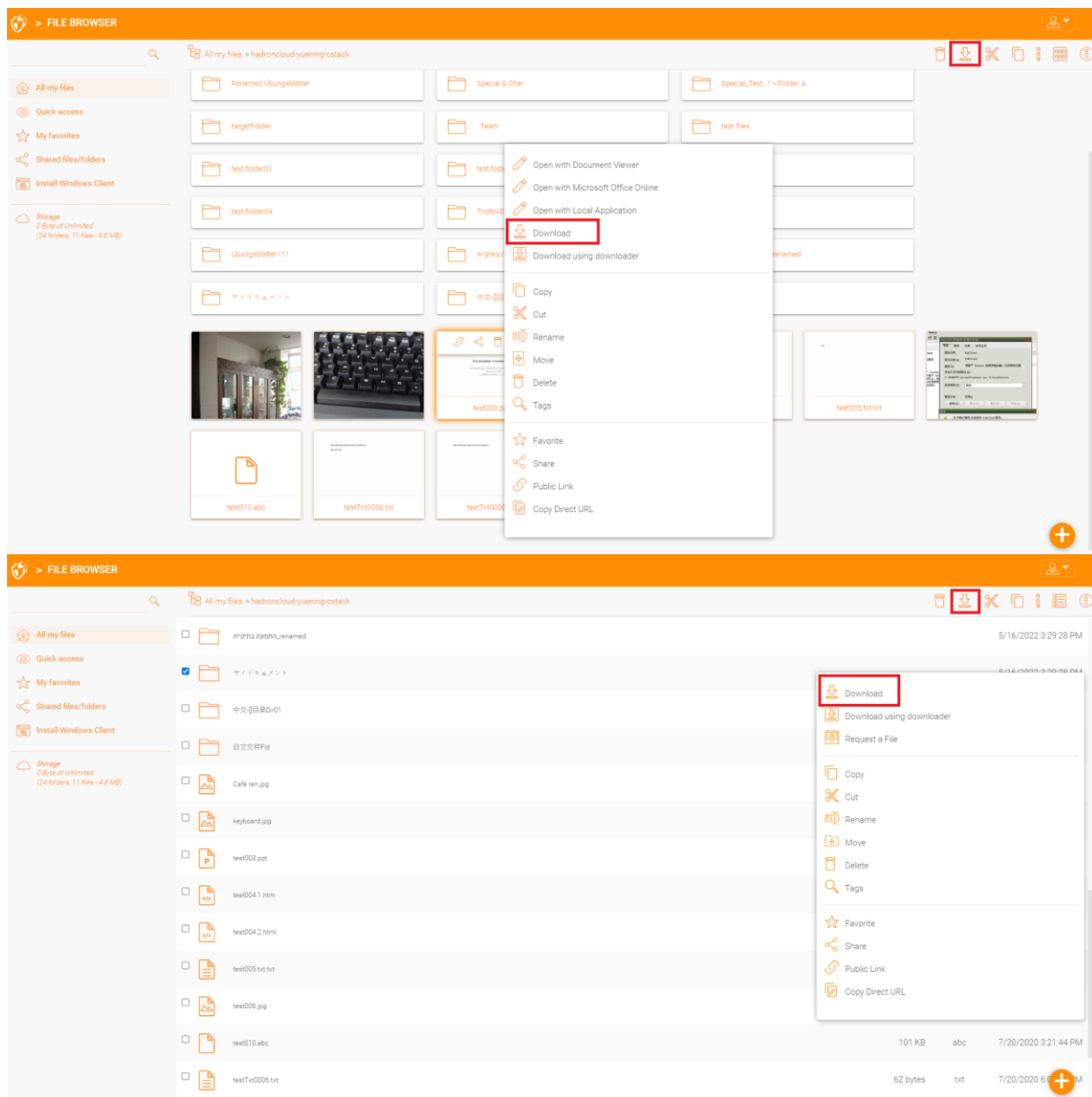
To rename and delete files and folders, right-click on the file in the "File Browser" and select the appropriate context menu item or use the small icons in the Detailed View bar of the selected item.



## Downloading Files

There are several ways to download files in Triofox:

When you select a file in the "File Browser", you can use the download icon **(1)** in the top bar. You can also right-click on a file and select "Download" **(2)** in the context menu. When you are in the "Detailed View" **(3)**, you can select a file and download it in the same way as in the icon view.



# Sharing

## Sharing vs Access to File Server Shares

There are two ways to share files and folders in Triofox:

- File Server Shares Access:

Available only to the administrator, who can enable remote access to any existing file server shares or folders created in Triofox. An administrator can enable access to shares for native Triofox users or existing Active Directory users.

- Sharing:

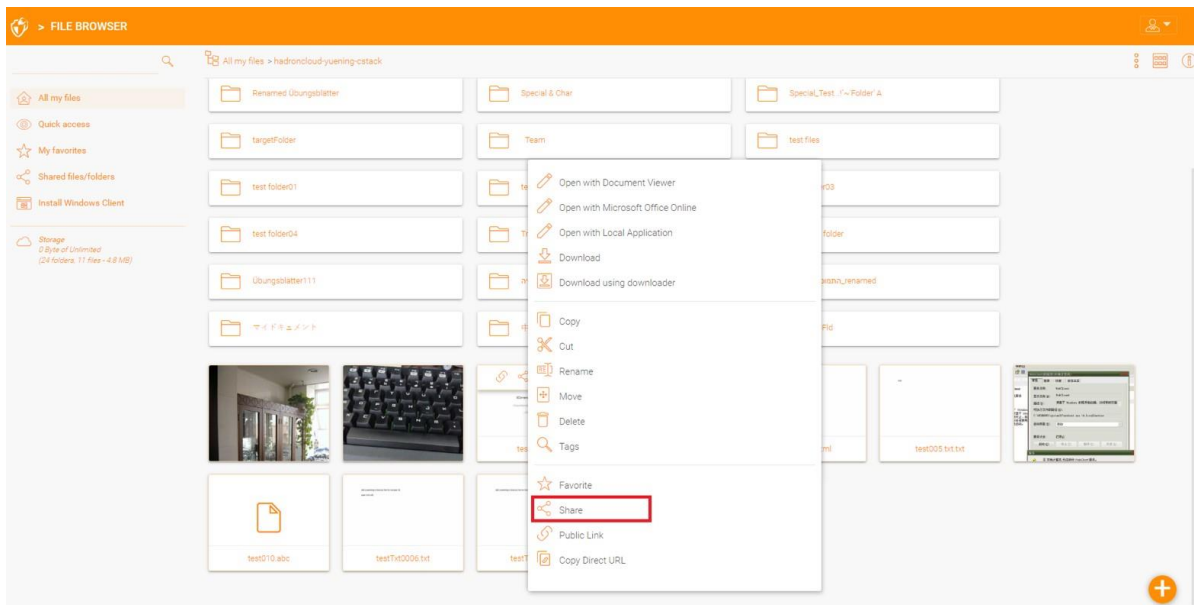
Both the administrator and users can share files and folders with anyone who has an email address. The recipient of the share will receive an email with a link to open the folder or download the file. If the recipient of the email is also a Triofox user, he/she can access the shared file or folder directly from his/her account.

Administrators can prevent users from sharing if needed.

## Sharing Files and Folders

### File Sharing

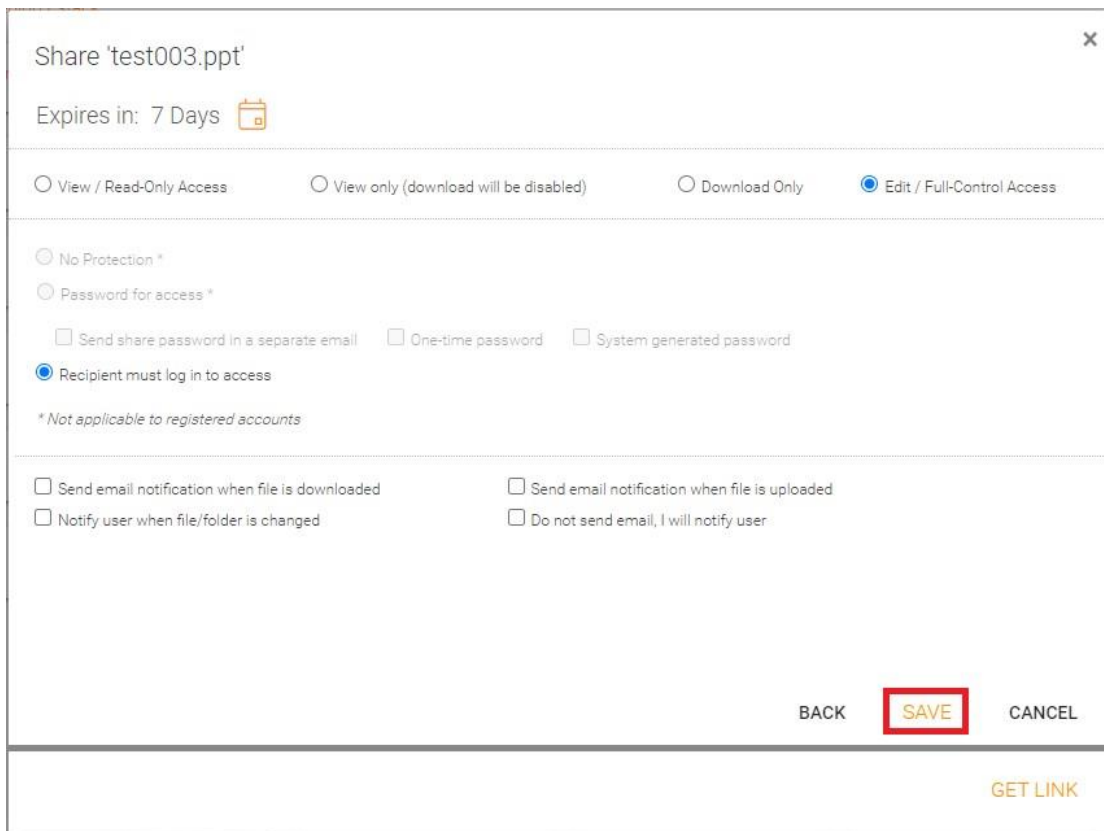
To share a file, highlight the file and click the 3 dots to bring up the context menu from which you can select the **Share** option, revealed in the file header. You can also right-click the file and select the **Share** option from the context menu. When the file is selected and the right panel is open, you will also find a **Share** link there.



After clicking "Share" above, in "Invite People" window, click the email field and enter the email address(es) separated by semicolons (;) for all people who need access to the file. You can also add notes if required. Click CONTINUE.

A screenshot of the 'Share' dialog box for a file named 'test003.ppt'. The dialog has a title bar 'Share 'test003.ppt'' and a close button (X). Below the title, it says 'Invite People : (Email Address, separated by ';')'. There is a text input field containing 'shareUser@share.com', which is highlighted with a red box. Below this, there is a section for 'Notes (text will be included in the sharing email):' with a large empty text area. At the bottom right, there are two buttons: 'CONTINUE' (highlighted with a red box) and 'CANCEL'. There are also icons for a link and people at the bottom left.

The second share window gives you access to the sharing options panel where you can make important decisions, such as how long the share should be active and how much control you want to give the user (e.g., read-only, full-control access). You can also make this share available to the public by getting a public link. If desired, you can also subscribe to notifications for the share.



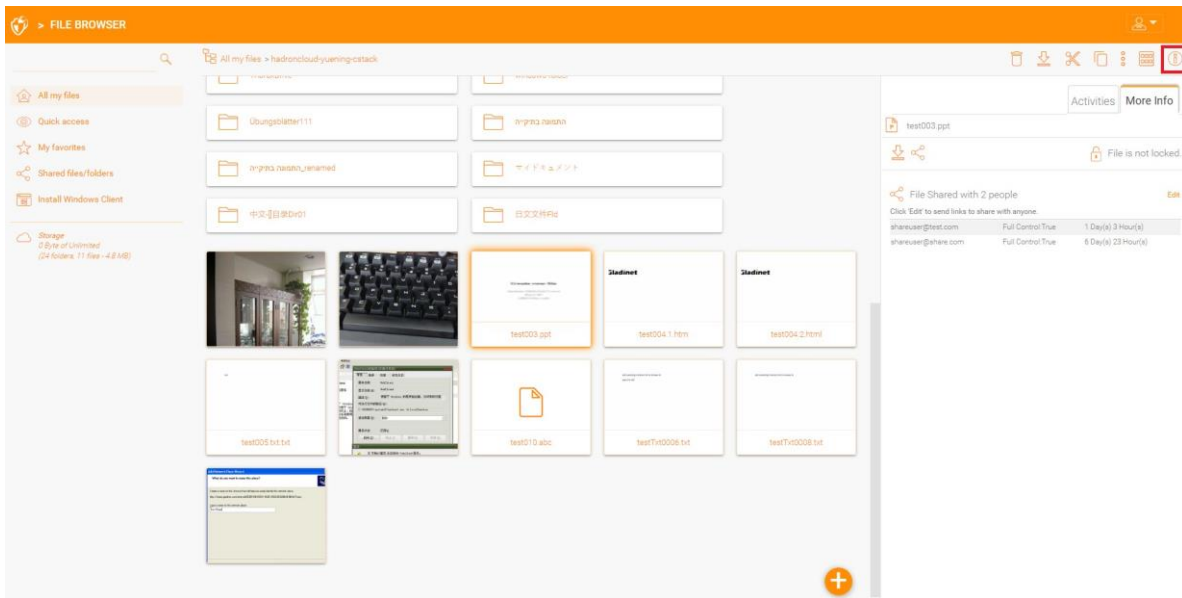
The screenshot shows a 'Share' dialog box for a file named 'test003.ppt'. The dialog has a title bar with a close button (X) in the top right corner. Below the title bar, it says 'Expires in: 7 Days' with a calendar icon. The main area contains several sections of options:

- Access level: Four radio buttons are present: 'View / Read-Only Access', 'View only (download will be disabled)', 'Download Only', and 'Edit / Full-Control Access'. The 'Edit / Full-Control Access' option is selected.
- Protection: Two radio buttons are present: 'No Protection \*' and 'Password for access \*'. The 'No Protection \*' option is selected. Below these are three checkboxes: 'Send share password in a separate email', 'One-time password', and 'System generated password'. The 'Recipient must log in to access' option is also selected.
- Notifications: Four checkboxes are present: 'Send email notification when file is downloaded', 'Send email notification when file is uploaded', 'Notify user when file/folder is changed', and 'Do not send email, I will notify user'. None of these are selected.

At the bottom right of the dialog, there are three buttons: 'BACK', 'SAVE' (highlighted with a red box), and 'CANCEL'. At the bottom center, there is a 'GET LINK' button.

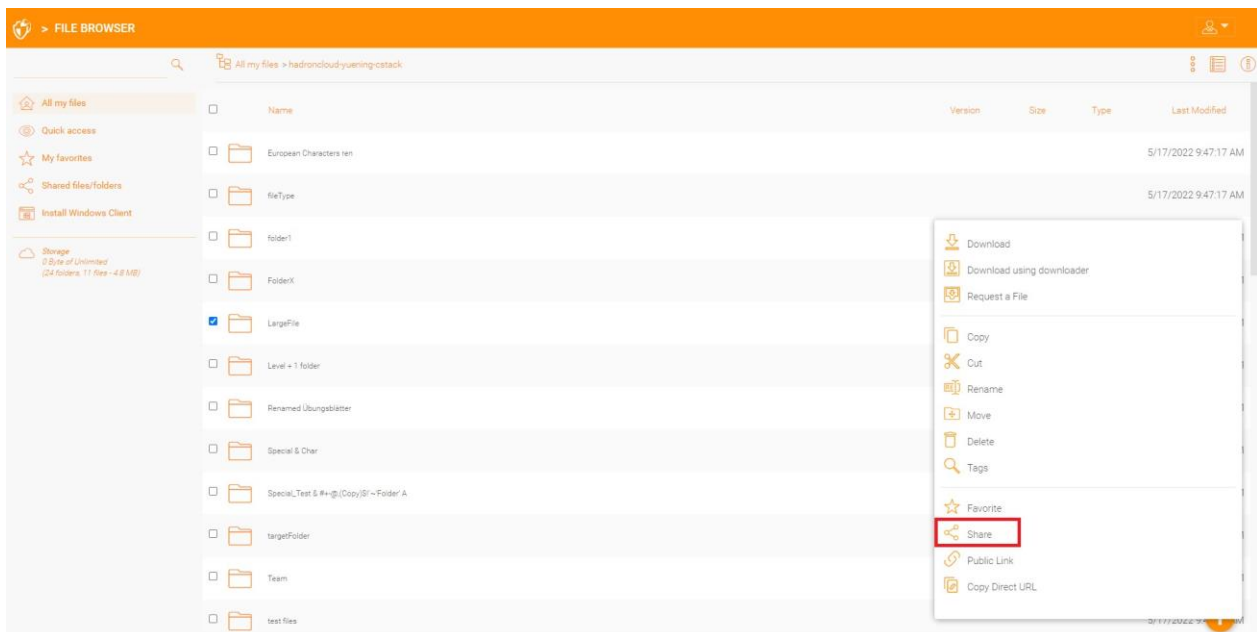
You can access previously shared items by clicking on the share icon on a folder or file. You can access other shares by opening the right panel and clicking the "Edit" button next to the "File Shared with people" option.





### Folder Sharing

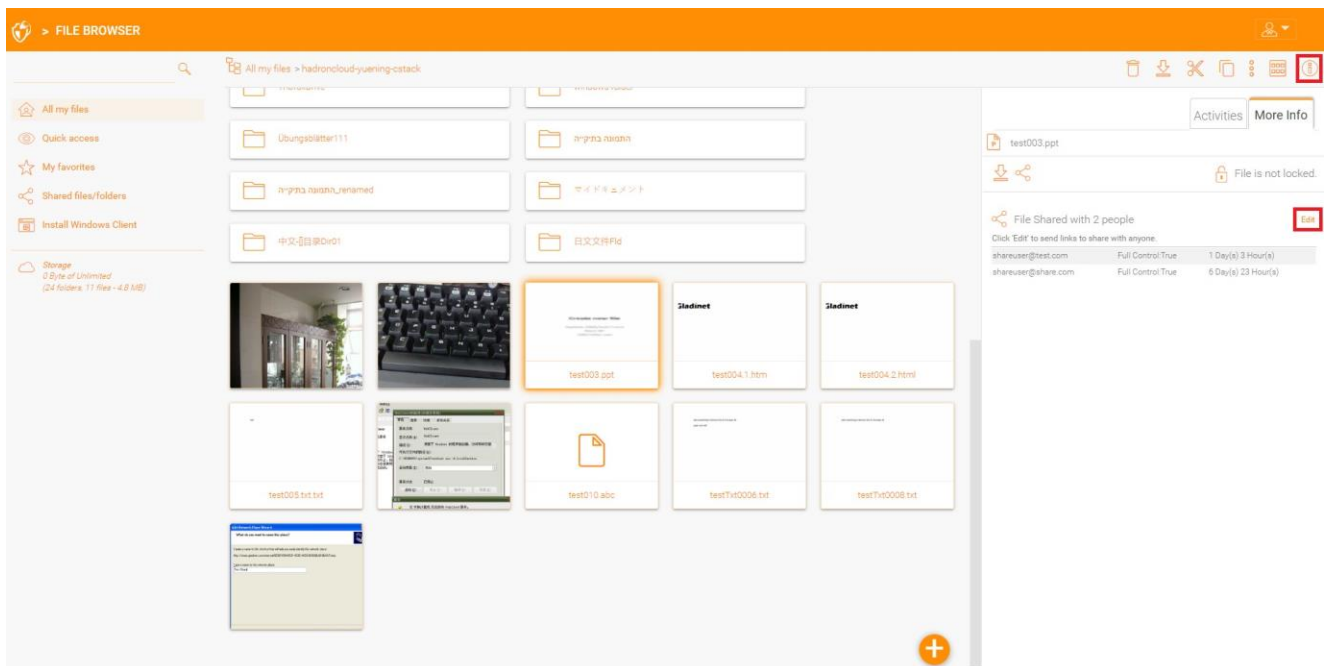
In this example, the icon view has been changed to a detailed view of the files in this folder. To share a folder, mouse-over it and select the Share icon in the corresponding row. You can also right-click on the file and select "Share" from the context menu.



## Removing Shares

When setting up a share, a user can specify an expiration date. Once the share expires, other users can no longer access the share.

Users can also delete the share manually. To delete a user's access to a share, open the right panel and click the "Edit" icon for shared items. In the next panel, select the item you want to change, and then click the Delete icon in the pop-up window to remove that user's permission to the share.



FILE BROWSER > EDIT SHARE

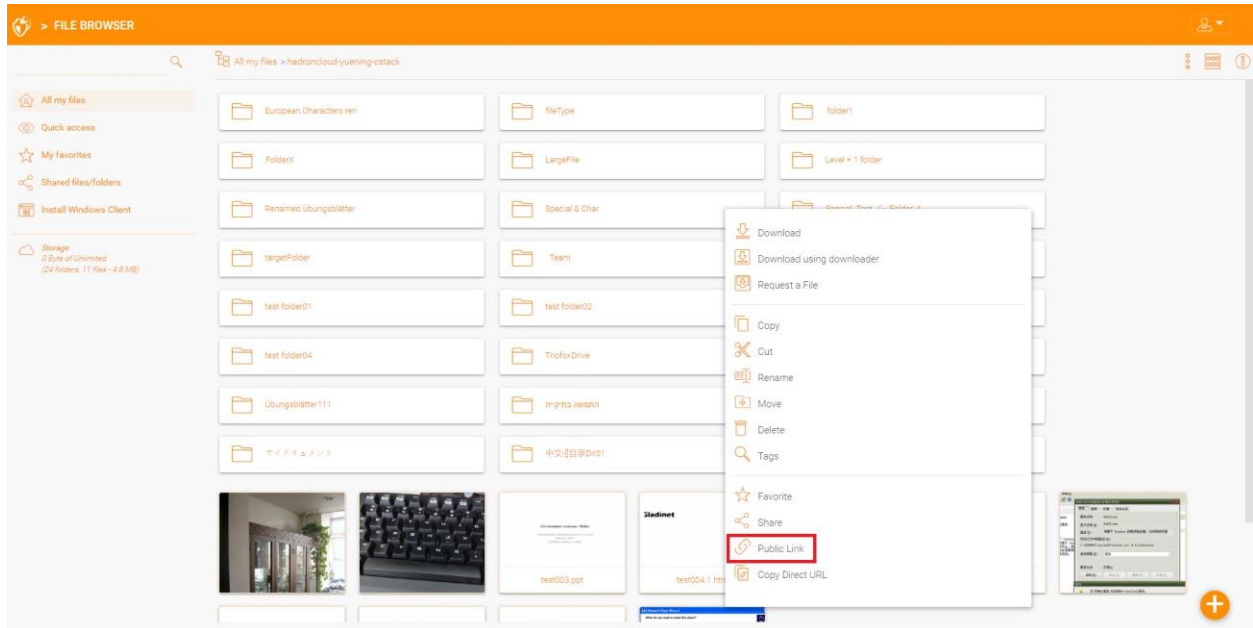
Shared with the users listed below:

User Email	Full Control	Expiration	Download Notification	Change Notification	Notify User
shareuser@share.com	True	6 Day(s) 23 Hour(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A red box highlights the 'Edit' icon in the bottom right corner of the table.

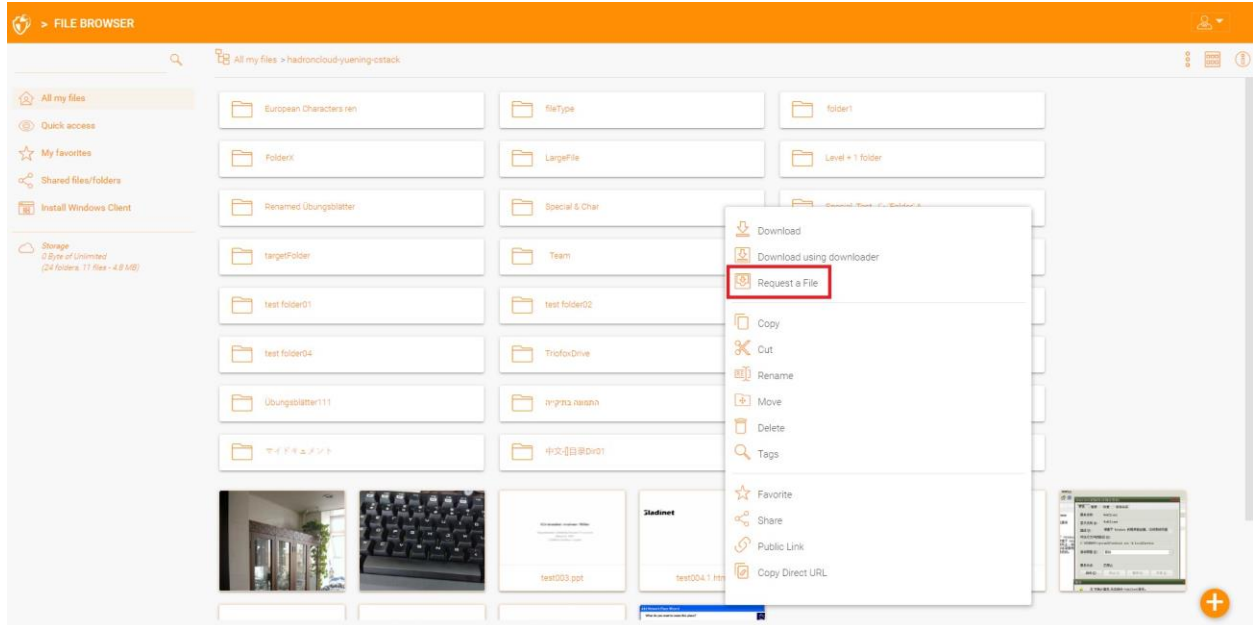
## Get Public Link

In the Web Portal, you can retrieve the public link for a file with "Read-only" access by right-clicking on a file or folder.



## Request a File

You can request a file for folders via the Web Portal.



### Request File

Send a file upload request email to the following address:

[SEND EMAIL](#)

OR

Copy the link below so you can send it to your users manually:

[GENERATE LINK](#)

[CLOSE](#)

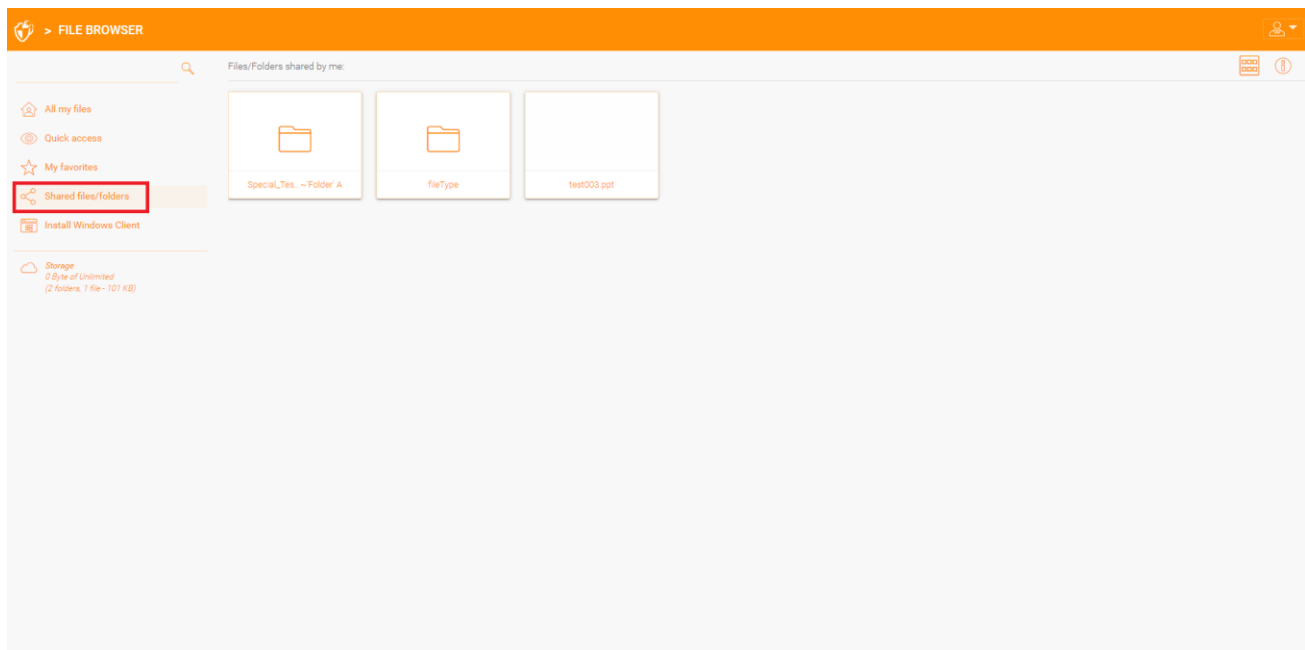
## Accessing 'Files/Folders Shared with Me'

When a file or folder is shared with the user, he/she will receive an email. The link in the email can be used to open the file or folder.

If the user has a Triofox account with the specified email address, the shared files and folders will appear under the "Files shared with me" folder in both the Triofox Web Portal and the Triofox Desktop App.

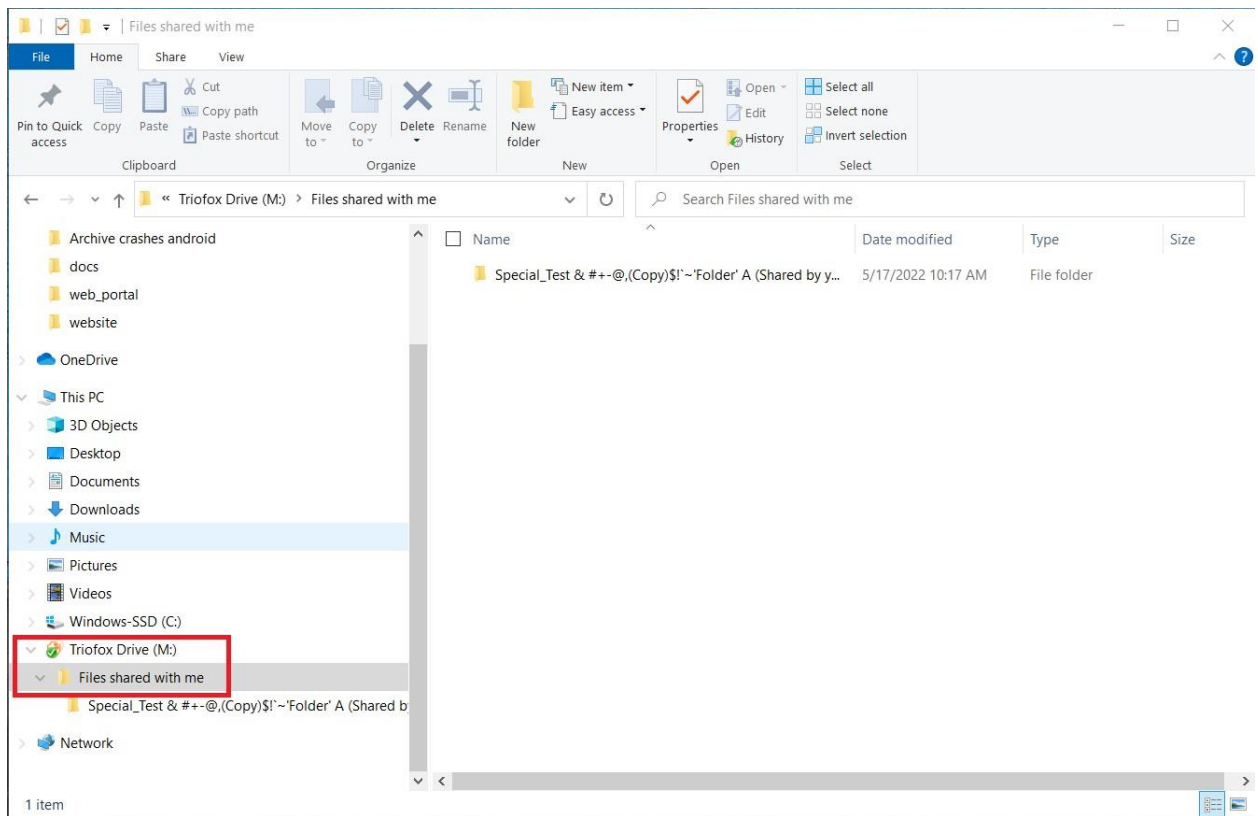
### Web Portal

You can access the shared files by clicking the "Shared files/folders" button in the File Browser view of the Web Portal.



### Desktop Clients

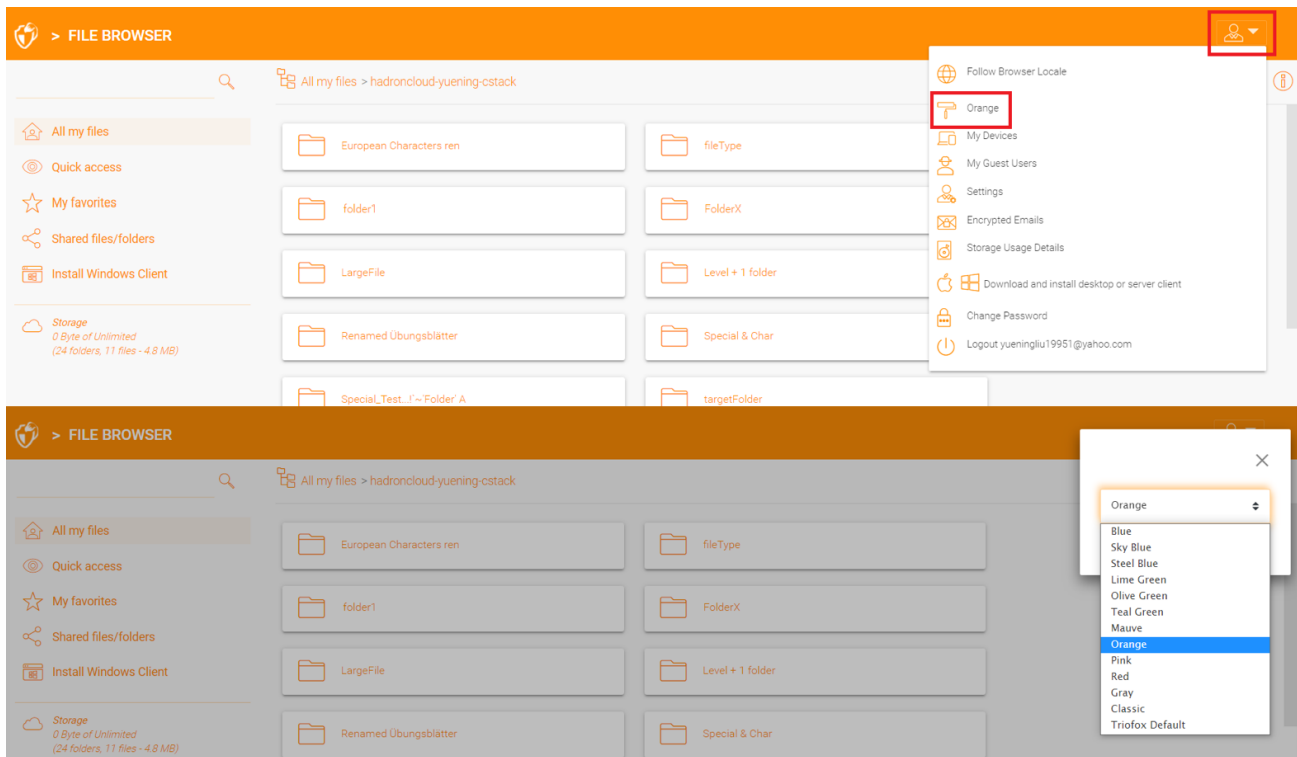
In the Desktop Clients you can access shared files by navigating to the Triofox drive using the Explorer. There you will find all shared files listed with information about who shared the file with you.



# User Menu

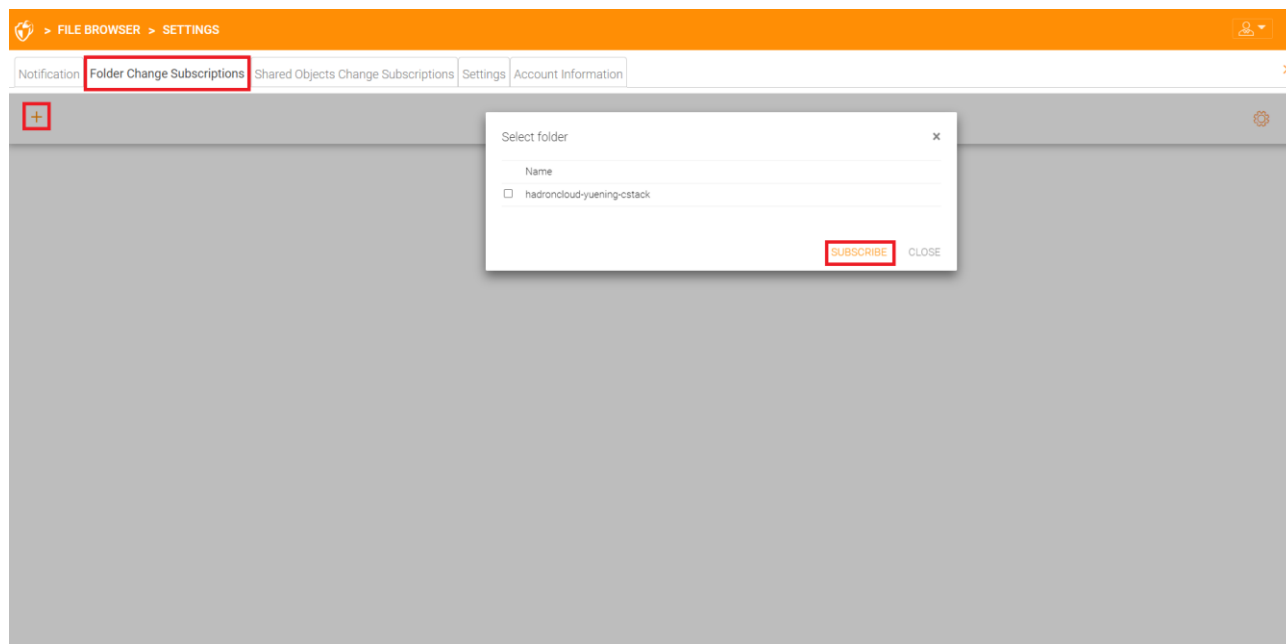
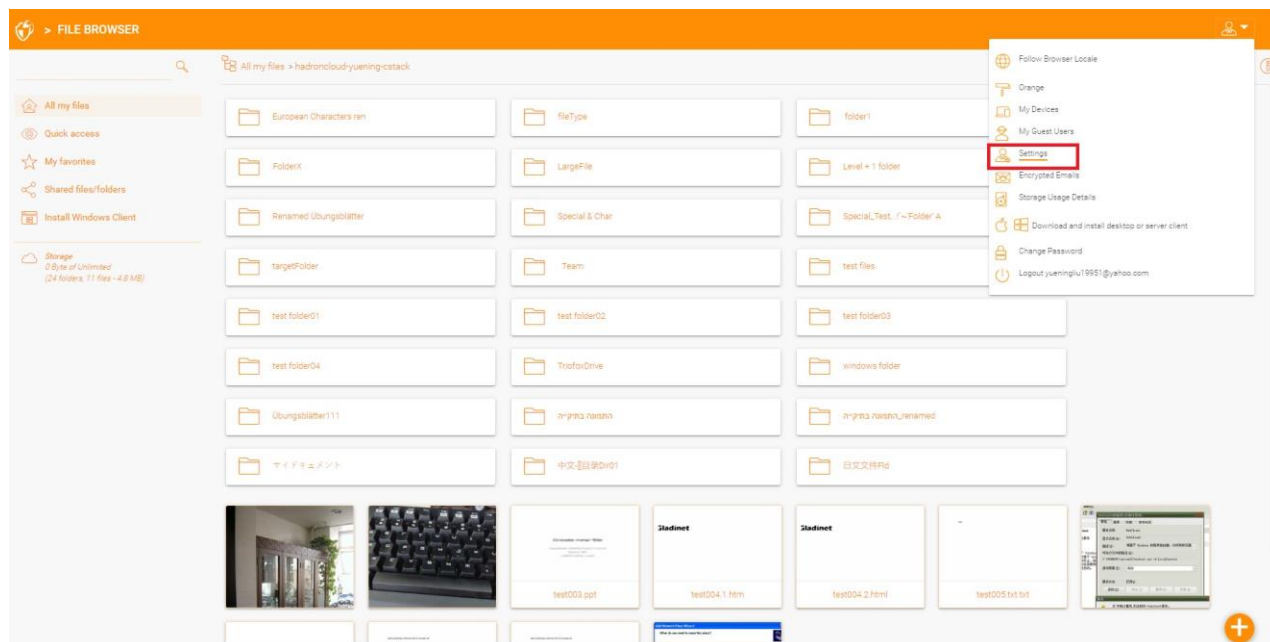
## Color Themes

Users can customize the theme of their web portal by clicking the user settings icon and then the down arrow icon. There are 12 predefined color themes and an option for a custom theme.



## Subscribing To Change Notifications for Folders

Users can subscribe to change notifications for folders. Once subscribed, whenever a file or folder in that folder is changed, the user will receive an email with a list of the changes. This notification only applies if the change was made by other users. No notification email is sent if the changes were made by the user himself/herself.



Visit the settings of the files page. Then go to the "Folder Change Subscriptions" tab and click the "+" icon. This will take you to a menu that shows which folders the user is subscribed to and gives the option to change whether or not they want to be notified of changes.