

Quick Start Guide

Tips to help you make the best possible start in the Fabasoft Cloud

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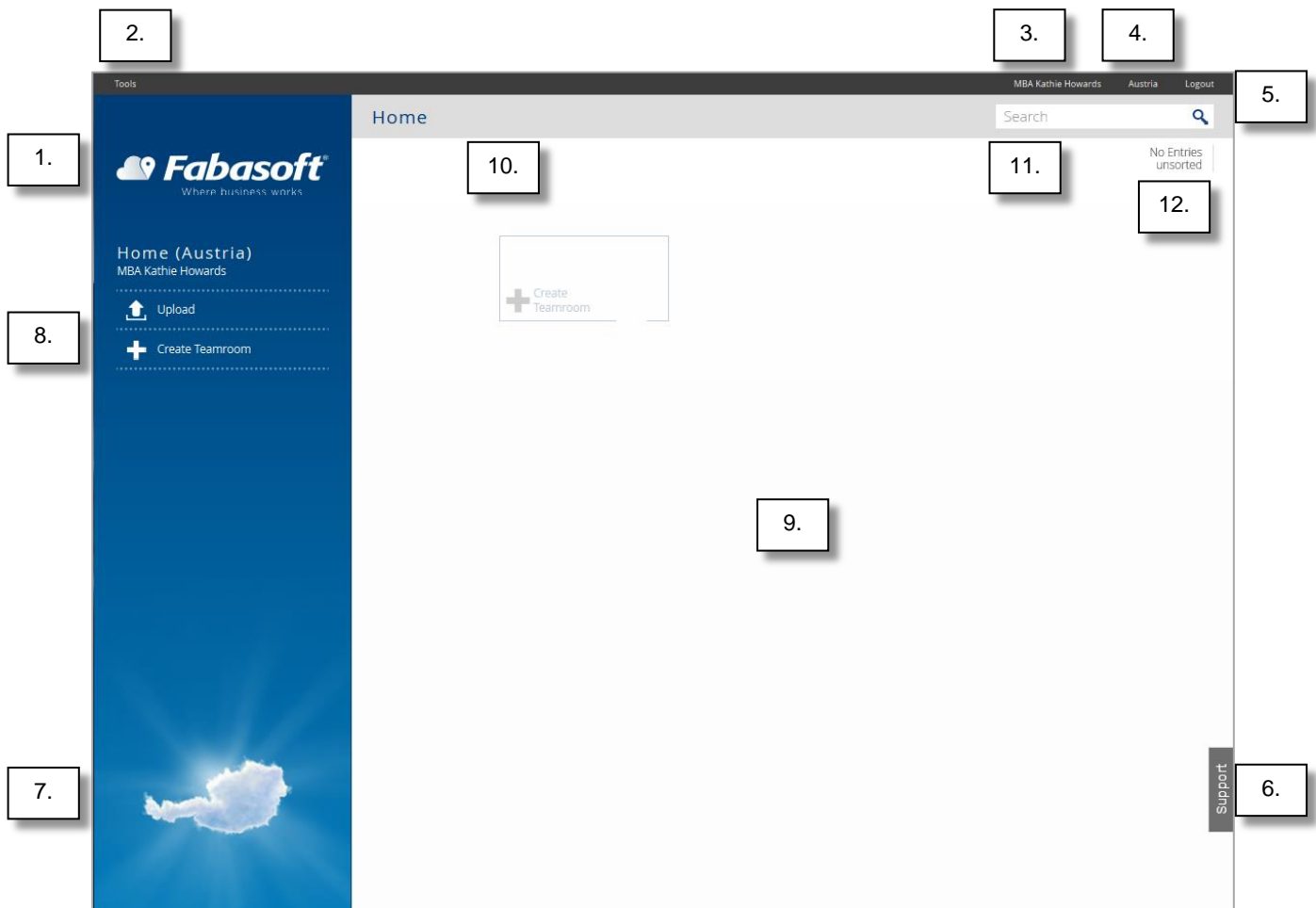
The Fabasoft Cloud – Your European Business Cloud

Modern business works across all borders and all devices, making it essential to know where your data is, know who you are sharing it with and know every change made. The Fabasoft Cloud is protected to the highest standards of European security, giving you the power to work wherever, however and with whomever you wish.

As a **Fabasoft Cloud Professional** or **Enterprise** user you can easily upload documents to the Fabasoft Cloud, make changes and send links to colleagues and business partners so that they can make changes themselves or read the content. How does this work? Let us show you...

First step: Log in [here](#) with your user name, password and mobile PIN.

This is what your Fabasoft Cloud user interface looks like once you've successfully logged in:



1. The **Fabasoft Cloud logo** top left always takes you back to your home screen.
2. Under **Tools** in the top menu bar you switch between Actions, Favourites, Navigation and Team. These tools change intuitively depending on where you are in the cloud.
3. Adjust your **personal settings** by clicking on your name in the top menu bar.
4. Change your **cloud location** – the country in which you want your data to be saved – by clicking on the country in the top menu bar.
5. **Logout** at any time via the logout button in the top menu bar.

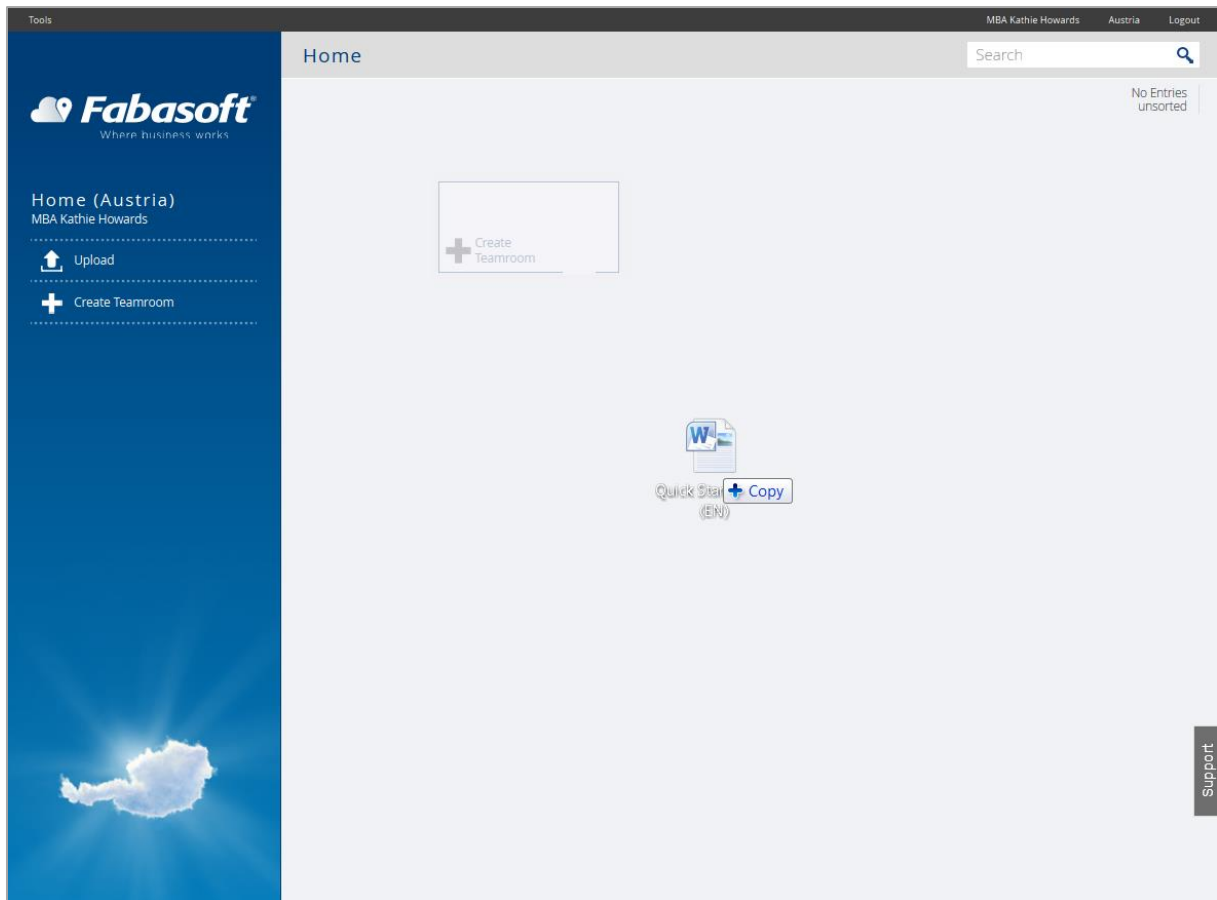
6. The quickest and most efficient path to our support team is via the **support button** on the right side of the screen. Click here if you have any technical questions, need assistance or simply want to share a feature wish with us.
7. See at a glance which country (**cloud location**) you are saving your data in.
8. **Dynamic menus** appear in this area depending on what tool you have selected (Actions, Favourites, Navigation, Team) and depending on the context of where you are in the Fabasoft Cloud.
9. In this “**content**” field you find Teamrooms, folders and documents in whatever display view you select. Open Teamrooms, folders and documents with a single click. Right click on objects to open the “context menu”, which displays the full list of actions available to you for that object. Right click on the white background to switch between the different views.
10. The grey bar below the top menu displays clickable **breadcrumbs** so that you always know where you are in the Fabasoft Cloud. Right click on the breadcrumb objects to access the respective context menus.
11. Type your search term into the **search bar** to quickly find what you need in the cloud.
12. Click here to configure the **sorting settings** for the content on your screen so that your information is organised as you want it.

Upload your first document

Upload a document by drag & drop, copy & paste or via the “Upload” button from your computer to your Home screen.

You are automatically asked to assign the document to a Teamroom. Give the new Teamroom a name and confirm with “Next”. You can, of course, upload documents to existing Teamrooms in the same way.

The Fabasoft Cloud supports all common file formats and also offers full online previews directly in your browser so that you can view content online without having to open any other application or program.

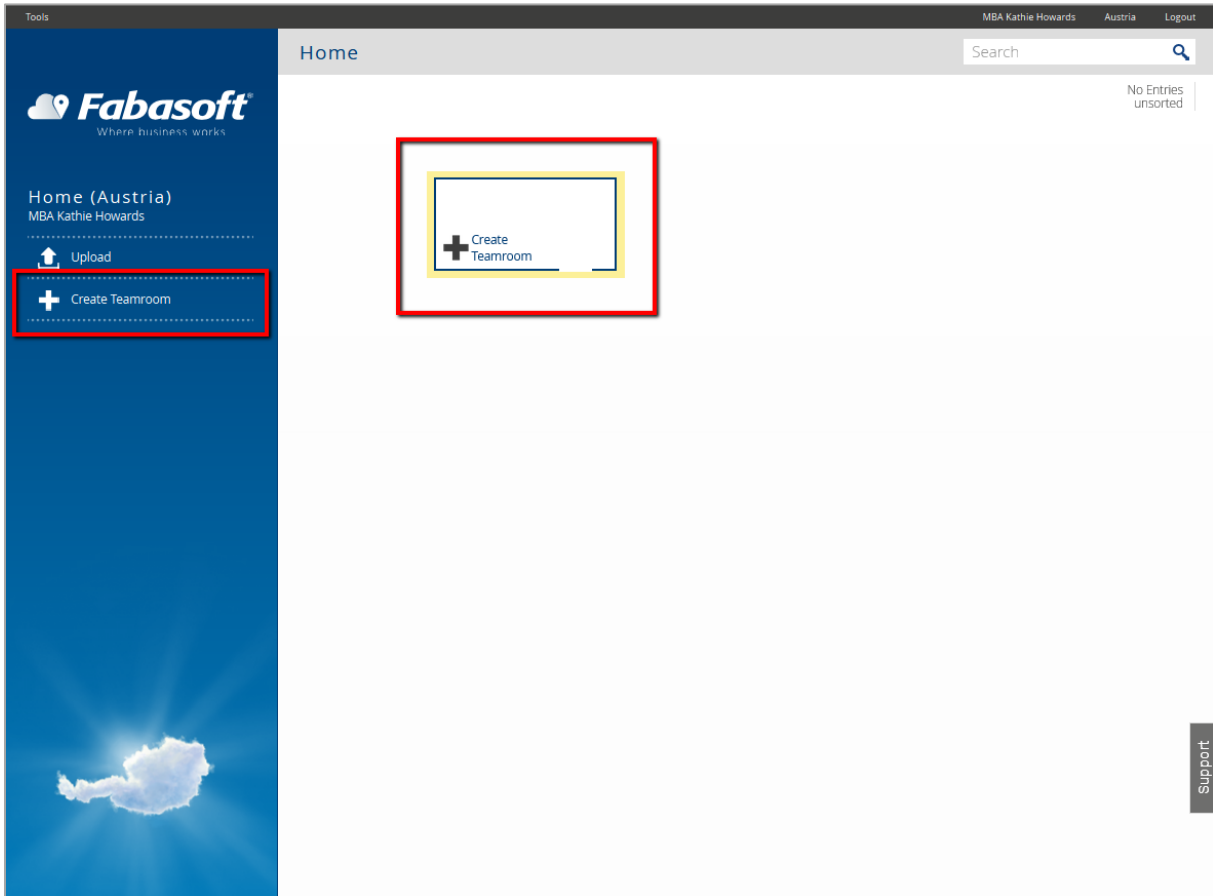


What is a Teamroom?

The most important collaboration element in the cloud is the Teamroom.

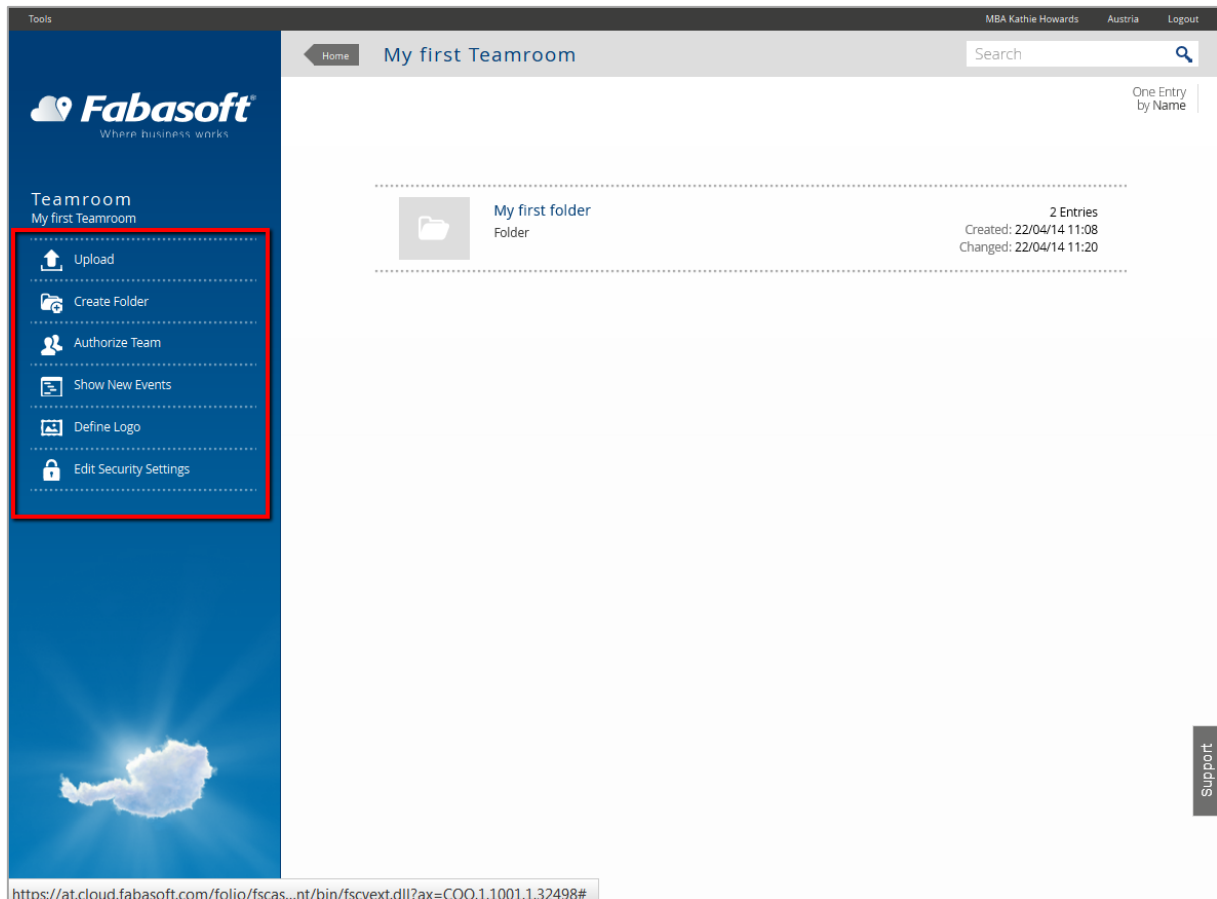
Only people who you explicitly invite and authorise have access to the content in the Teamroom. You decide whether contacts should have read, change or admin (full control) access.

You can create as many Teamrooms as you need via the menu point “Create Teamroom” or via the “Create Teamroom” hint on your Home screen.



Enter the name of your Teamroom. If you belong to a cloud organisation then the Teamroom is assigned to that cloud organisation. Confirm with "Next". Your Teamroom appears on your Home screen.

Open the Teamroom with a single click. In the left menu bar you can edit the Teamroom's security settings, add a Teamroom logo, define access rights for your team and view a timeline of everything that has happened within the Teamroom.



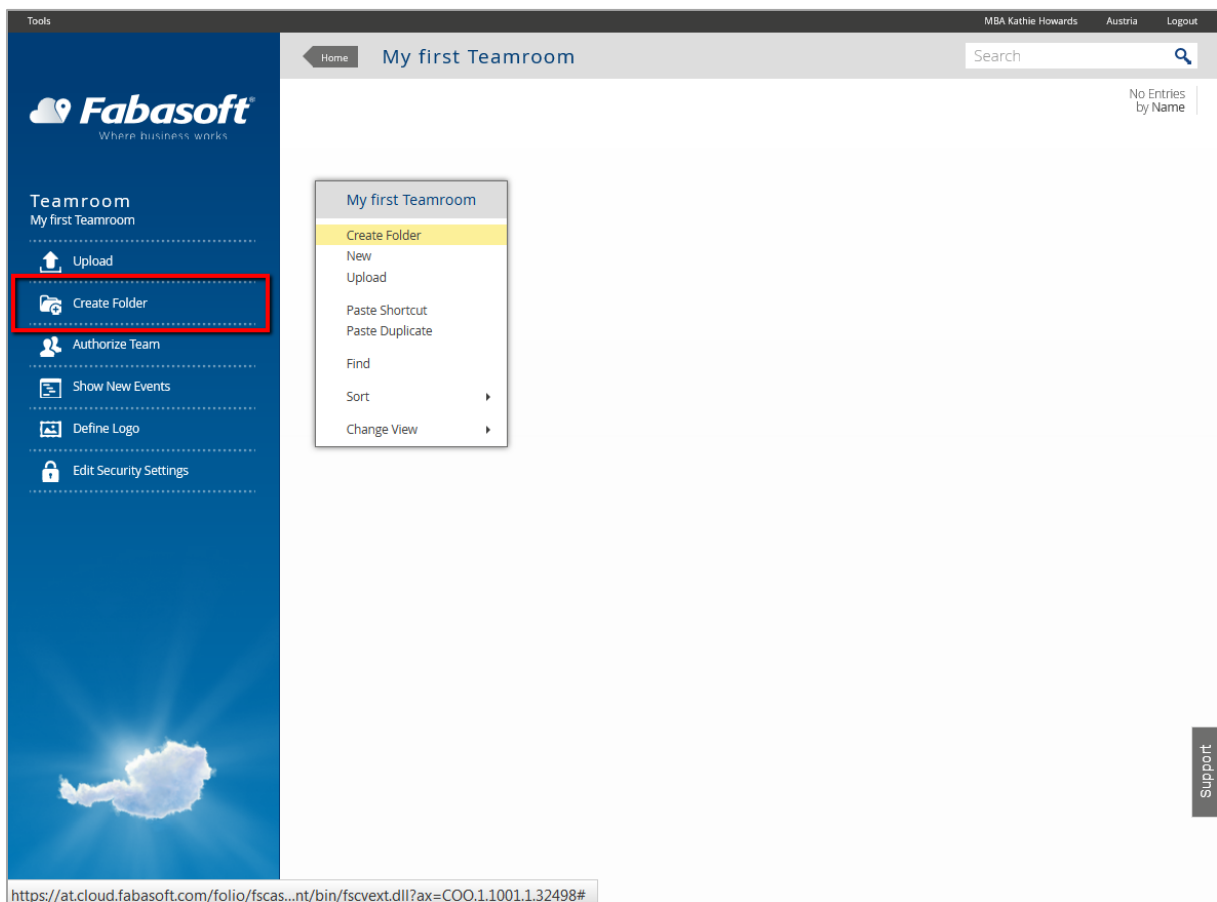
My first folder

Create folders to organise your content. Create folders via the left menu or via the context menu (right click anywhere on the background).

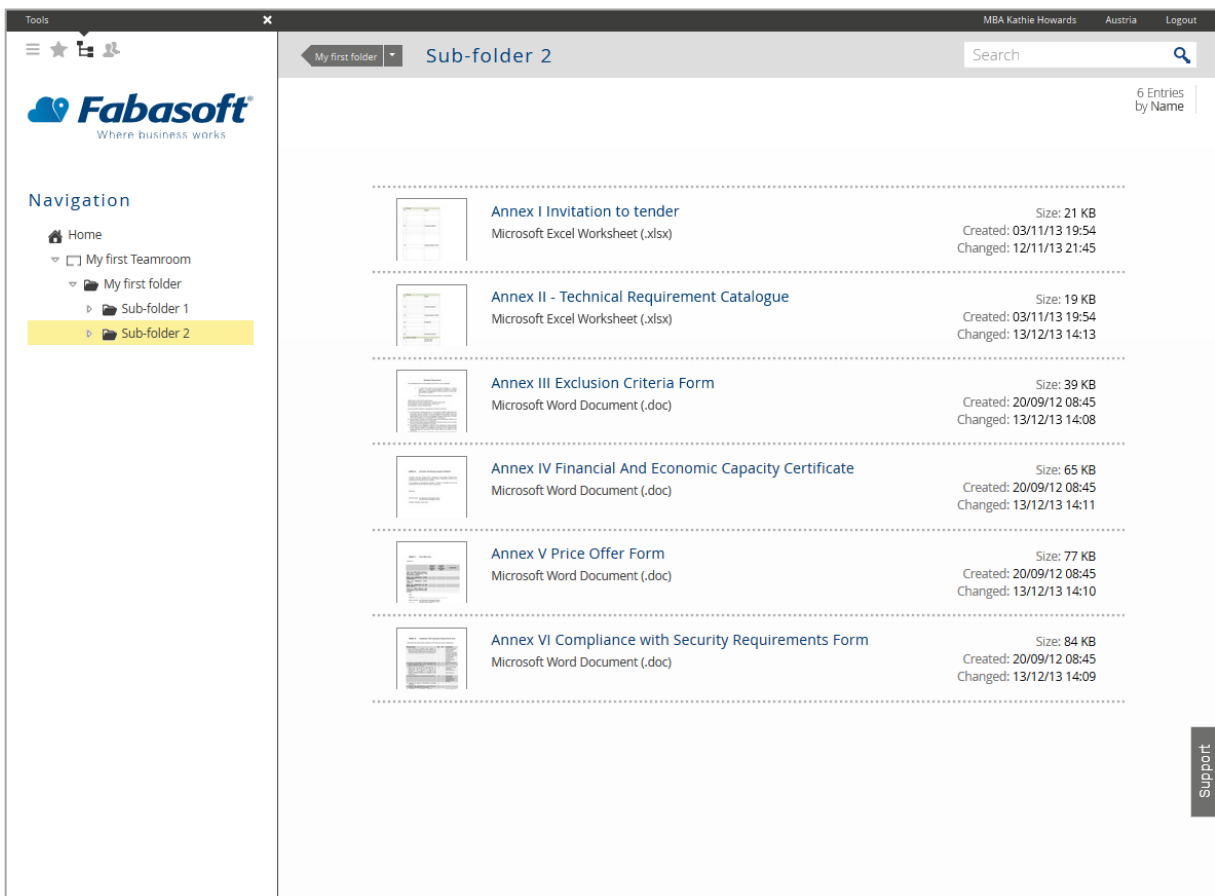
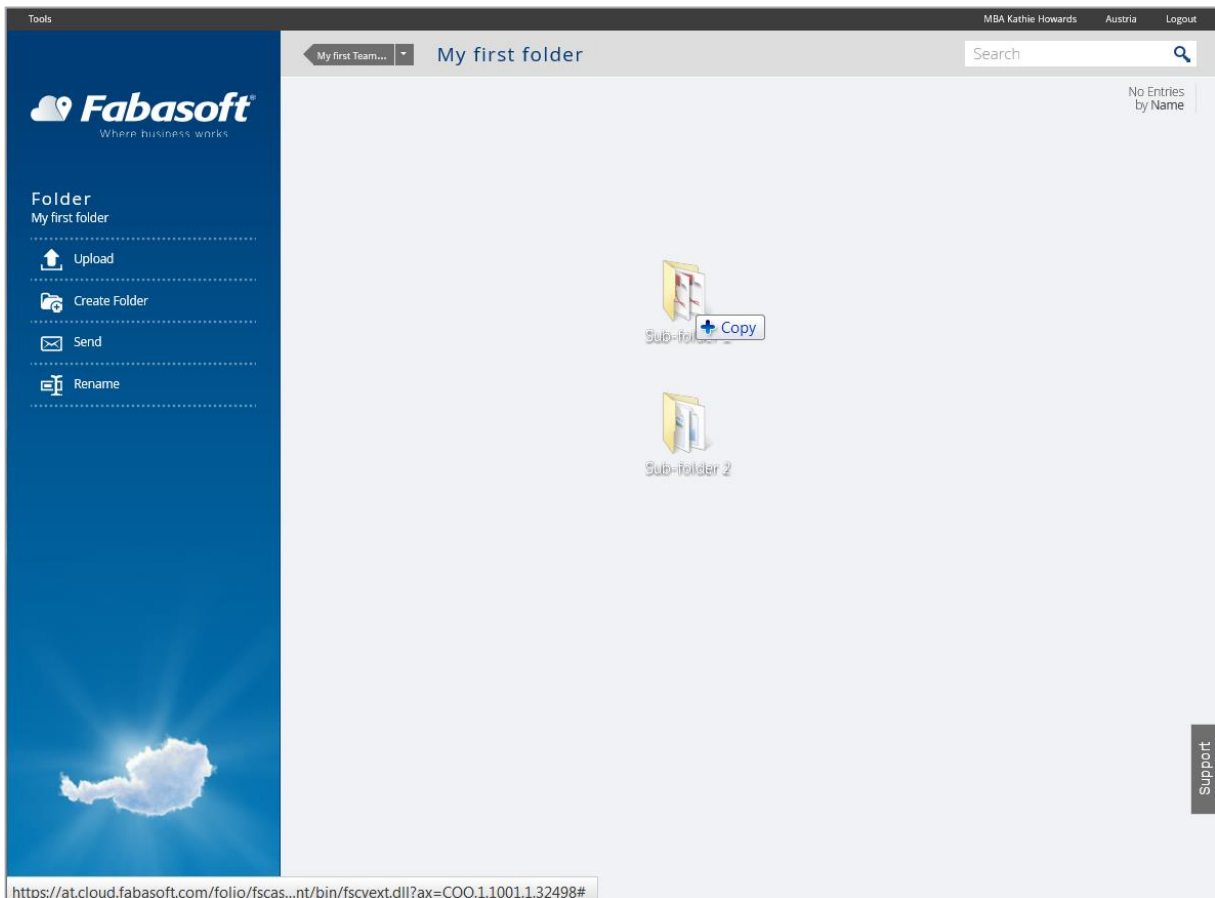
Folders inherit the access rights defined by the Teamroom in which they are created.

You can also create folders directly on your Home screen to organise your Teamrooms (only you have access to folders created on your Home screen as there is no governing Teamroom).

Open folders with a single click and drag & drop or copy & paste content into the folder.

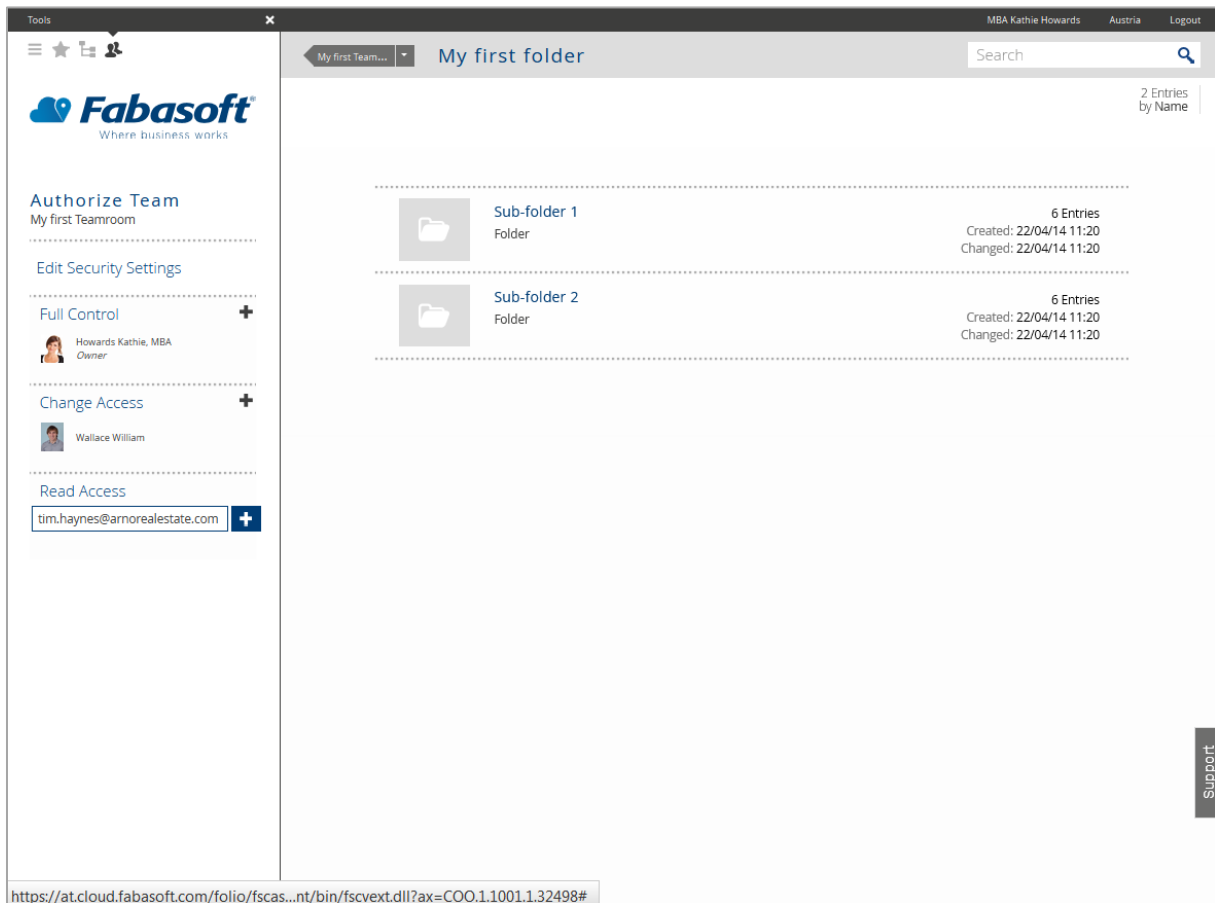


Tip: Copy and paste entire folder structures into the Fabasoft Cloud – all sub-folders with their contents are also imported.

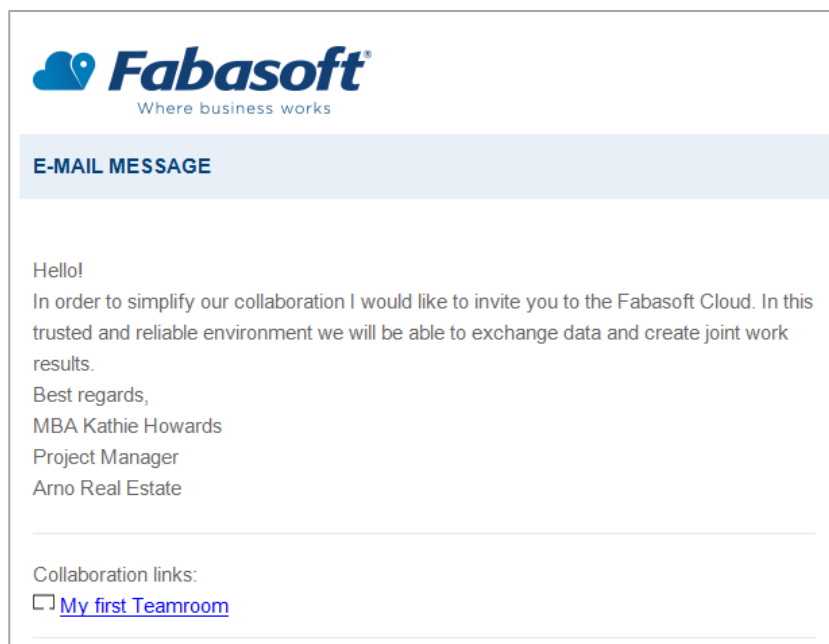


My first Teamroom invitation

In order to make documents available to colleagues and business partners in the Fabasoft Cloud, simply send an invitation. If you find yourself in a Teamroom, click on “Team” under “Tools” and then on “Authorize Team”. Add the email address of the relevant person so that they are assigned the relevant access rights.

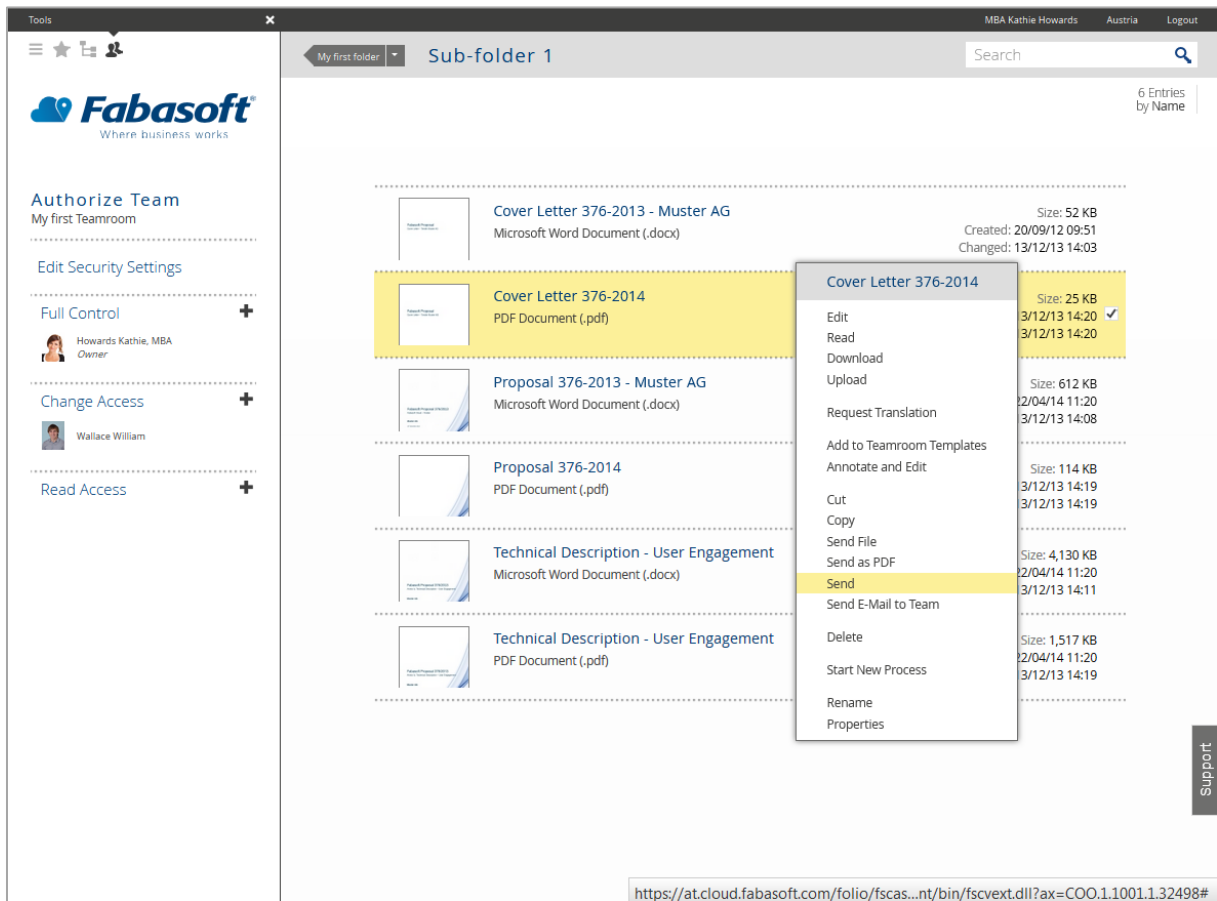


This person then receives an email with a link to access the Teamroom. If the person is not a Fabasoft Cloud user, they are automatically prompted to create a free guest account. Guest account users automatically have read access in the Teamroom.



Share links

To send secure links to documents, folders or Teamrooms to colleagues and business partners, right click on the relevant element(s) and select “Send”. The link is sent by email and can only be opened by Fabasoft Cloud users who have access rights in the Teamroom. Data transfer is always encrypted.



The screenshot shows the Fabasoft Cloud interface. On the left, there is a sidebar with the Fabasoft logo and navigation options: 'Authorize Team', 'Edit Security Settings', 'Full Control', 'Change Access', and 'Read Access'. The main area displays a folder named 'Sub-folder 1' containing six files. A context menu is open over the file 'Cover Letter 376-2014', with the 'Send' option highlighted. The file list includes details such as file type, size, and creation/modification dates.

File Name	File Type	Size	Created	Changed
Cover Letter 376-2013 - Muster AG	Microsoft Word Document (.docx)	52 KB	20/09/12 09:51	13/12/13 14:03
Cover Letter 376-2014	PDF Document (.pdf)	25 KB	3/12/13 14:20	3/12/13 14:20
Proposal 376-2013 - Muster AG	Microsoft Word Document (.docx)	612 KB	22/04/14 11:20	3/12/13 14:08
Proposal 376-2014	PDF Document (.pdf)	114 KB	3/12/13 14:19	3/12/13 14:19
Technical Description - User Engagement	Microsoft Word Document (.docx)	4,130 KB	22/04/14 11:20	3/12/13 14:11
Technical Description - User Engagement	PDF Document (.pdf)	1,517 KB	22/04/14 11:20	3/12/13 14:19

The context menu for 'Cover Letter 376-2014' includes the following options: Edit, Read, Download, Upload, Request Translation, Add to Teamroom Templates, Annotate and Edit, Cut, Copy, Send File, Send as PDF, Send, Send E-Mail to Team, Delete, Start New Process, Rename, and Properties.

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