Nextiva Drive™
Admin Portal Guide

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Section One - Nextiva Drive™ Introduction

Product Overview

Nextiva Drive is a cloud-based online storage product that enables you to securely back up, sync, and share your data. It's the most secure data backup, online storage and real-time sync, and it's with you anytime, anywhere, on any device – worry-free.

Nextiva Drive includes:

- Secure Storage Encrypted data transfer and storage in maximum-security data centers.
- **User Access Controls:** Administer multiple users in the same company or department.
- **Automatic Backup:** Schedule your own backup and sync, or let us do it automatically.
- **Secure Sharing:** All users are authenticated with unique passwords and can only access the files that have been shared with them.
- **Team Collaboration:** Bring remote work groups together in a single project folder and get everyone on the same page, literally.
- **Mobile Access:** Regardless of where the file was created, access it on any device.

Nextiva Drive Plan Features

All Nextiva Drive plans offer the same suite of features:

- **Online Data Storage:** Cloud storage of all data with the ability to access it anywhere.
- **Secure Data Transfer:** Securely transfer data from one device to another or directly to the cloud.
- **Automatic Backup:** Backups that are based on a schedule, on-demand, or automatically.
- **SSL Security:** Data transfers are encrypted with 256-bit AES for maximum security.
- **Team Collaboration:** Share files across devices, projects, and locations, whether your team is in or out of the office.
- **User Role Administration:** Give user access permissions for read-only, read and write, or full control based on their role.
- **Drag-n-Drop File Upload:** Upload new files with the easy drag-n-drop tool.
- **Real-time Sync:** Any time you add or edit a file, it syncs across all of your devices.

Sync vs Backup

Nextiva Drive offers you several ways to store and share your data, but the two primary tools for managing your data are Nextiva Sync and Nextiva Backup. These two features provide different ways to securely store data in the cloud and are used for distinct purposes. It is important to understand the differences between these two features so that you can get the most out of your Nextiva Drive account.

Nextiva Sync uses the Nextiva Sync client, which enables you to designate a folder on your computer that synchronizes automatically with the cloud. Utilizing a constant Internet connection, any time a file is added to or modified in the Nextiva Sync folder, those changes are synchronized across all of your devices. These files can be shared with other Nextiva Drive users or groups, as well as shared externally with people who do not use Nextiva Drive.

Nextiva Backup utilizes the Nextiva Drive client and provides you with a secure way to back up important files, or even your entire computer, for disaster recovery purposes. Backups can be performed on demand or automatically based on a predefined schedule. These backup files are securely stored online in the cloud until needed. In the event of an accidental deletion or computer failure, you can restore your backup files and folders with the click of a button. However, unlike Sync, modifying a file that is part of a backup folder does not start an automatic backup process. The modified file will not be uploaded to the Drive account until the next scheduled or manual backup. Additionally, the length of time to back up or restore files is contingent on the size of the backup and on the network speed.

Section Two - Nextiva Drive Web Portal

Nextiva Drive Account Creation

When you initially sign up for Nextiva Drive, the account administrator will receive a welcome email with a link to the Nextiva Drive Web Portal (Figure 1-1).

Figure 1-1: Nextiva Drive Welcome Email

Nextiva Drive Web Portal Login

When you launch the Nextiva Drive Web Portal, you will be prompted to log in using the credentials provided in your Nextiva Drive welcome email (Figure 1-2).

Figure 1-2: Nextiva Drive Web Portal Login

After logging into the Nextiva Drive Web Portal, you will see the My Files section (Figure 1-3).
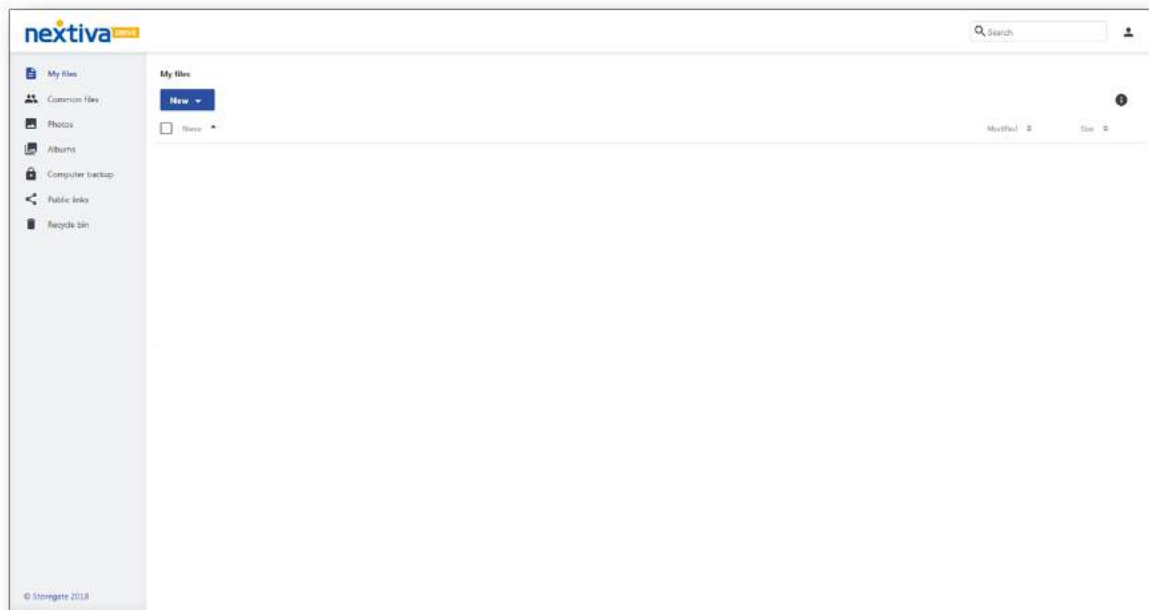

Figure 1-3: My Files

There are seven primary sections on the left hand menu:

- **My Files:** View and manage all synced files.
- **Common Files:** View and manage all synced files under Common Files.
- **Photos:** View and manage all synced photos.
- **Albums:** View and manage all synced photo albums.
- **Computer Backup:** View and manage all computer backup files.
- **Public Links:** View and manage all shared files.
- **Recycle Bin:** View and restore all deleted files.

User Management - Creating New Users

Click the **Account** button on the top right-hand corner of the page, then select **Users** from the drop-down list (Figure 1-4).
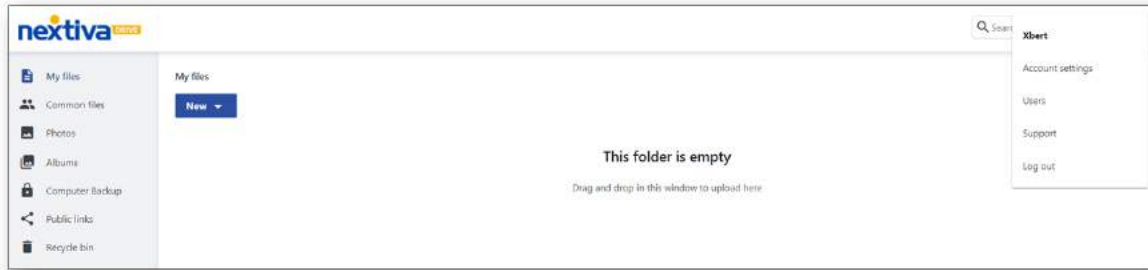
Figure 1-4: Users Option

Clicking **Create new user** at the top of the User section will open a new page that requests new user details (Figure 1-5). Enter the name and email address of the person you want to add to the account. A valid email address is required as the new user will receive an invitation email that contains an individualized link for completing their registration.

Figure 1-5: Create User

The "Reserved space" field allows you to define how much storage space will be allocated to this new user. Leaving the reserve space set to "0" will automatically set the new users storage space to the default 50 GB. The final field on the Create user page is for setting the user permissions for writing or uploading to the common root folder.

Clicking **Create** adds the new user to the account with a "Pending" status on the user management page and initiates the invitation email (Figure 1-6). The user status will not change until the user completes the registration process by clicking the link in their invitation email.
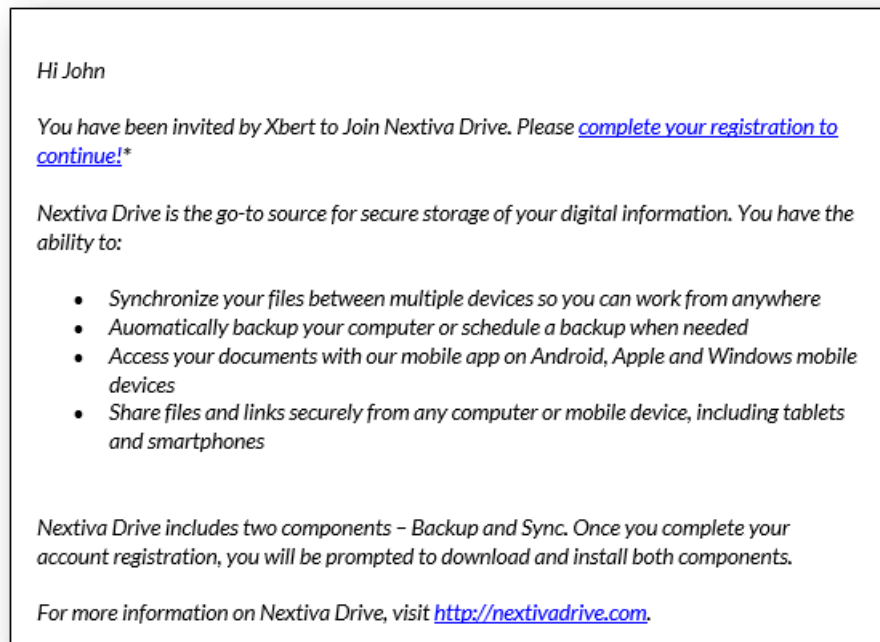

Figure 1-6: Nextiva Drive User Invitation Email

When the user clicks the link in their invitation email, it will take them to the new user registration page (Figure 1-7). The user can select a username and password for their account, as well as edit their first and last name or change their email address. When the user clicks **Confirm**, these settings will be saved, and the user will see a confirmation page that includes download links for the Nextiva Drive software clients. At the same time, the administration page will be updated with the new information, and the user status will change from "Pending" to "Active".

Figure 1-7: Nextiva Drive Registration Page

When a new user signs into their Nextiva Drive account for the first time, they will be prompted to download the Nextiva Drive software clients via a pop-up window (Figure 1-8). Selecting the "Do not show again" checkbox on that window will stop that message from appearing each time the user signs in.
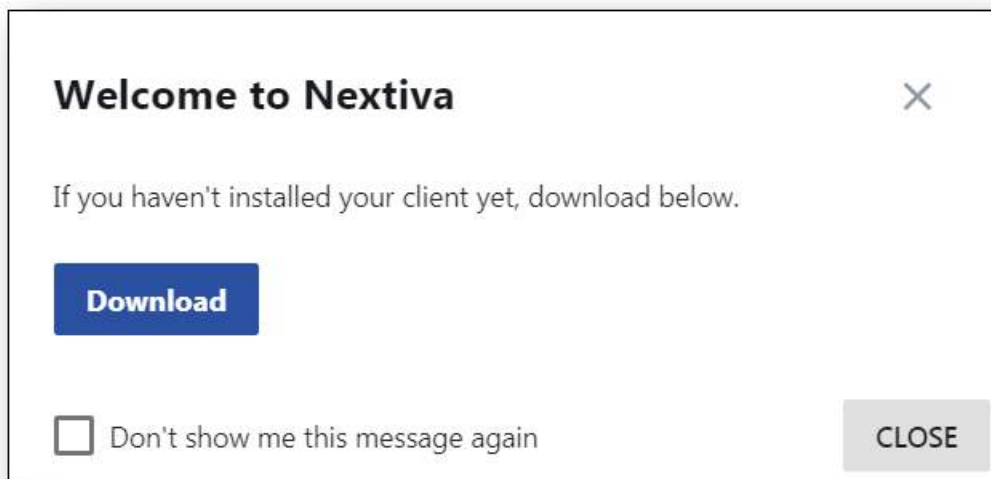

Figure 1-8: Nextiva Drive Welcome Pop-up Window

User Management – Editing and Deleting Users

To edit a specific user, click the user under the User section. This will open the user's settings, where you can update their first and last name and adjust their reserved space and global permissions. You'll also see additional options towards the bottom of the page to disable, delete, and add to group for this specific user (Figure 1-9).

Figure 1-9: Editing a Nextiva Drive User

Creating New Groups

A group organizes selected users into a team structure, which allows you to easily share documents and permissions with an entire organization simultaneously. To create a new group, click **Create group** on the Groups page (Figure 1-10). Enter the new group name and click **Save**. The new group will now appear on the Groups page.
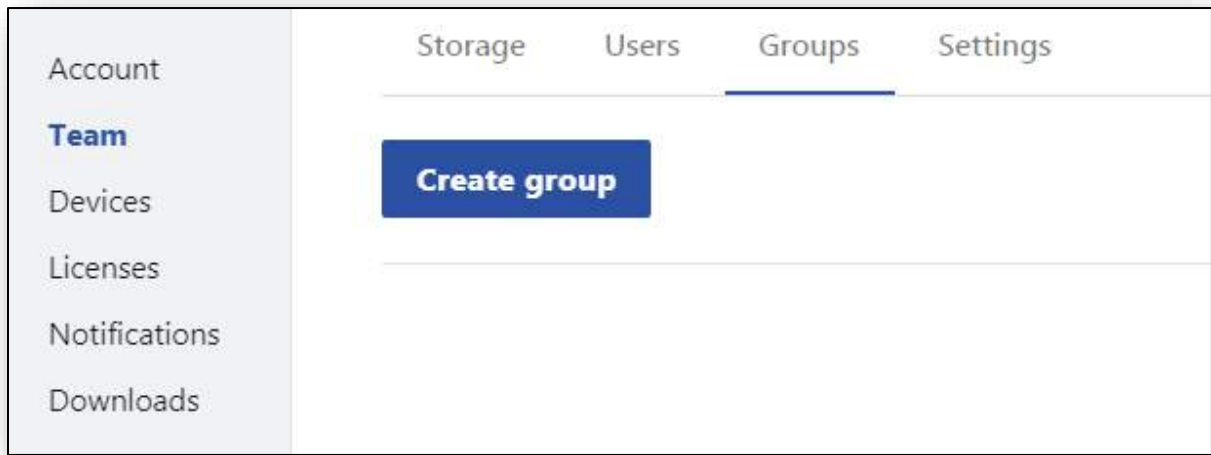
Figure 1-10: Create Group

Group Management - Adding and Deleting Users

There are multiple options for managing the users for a specific group. The first option for adding users is under the Users section. Select the user you want to add, and then click **Add to group** (Figure 1-11). Select the checkbox corresponding to the group(s) you would like to add the user to and then click **Add.** You can remove users from their assigned groups by clicking the "X" next to the group name.
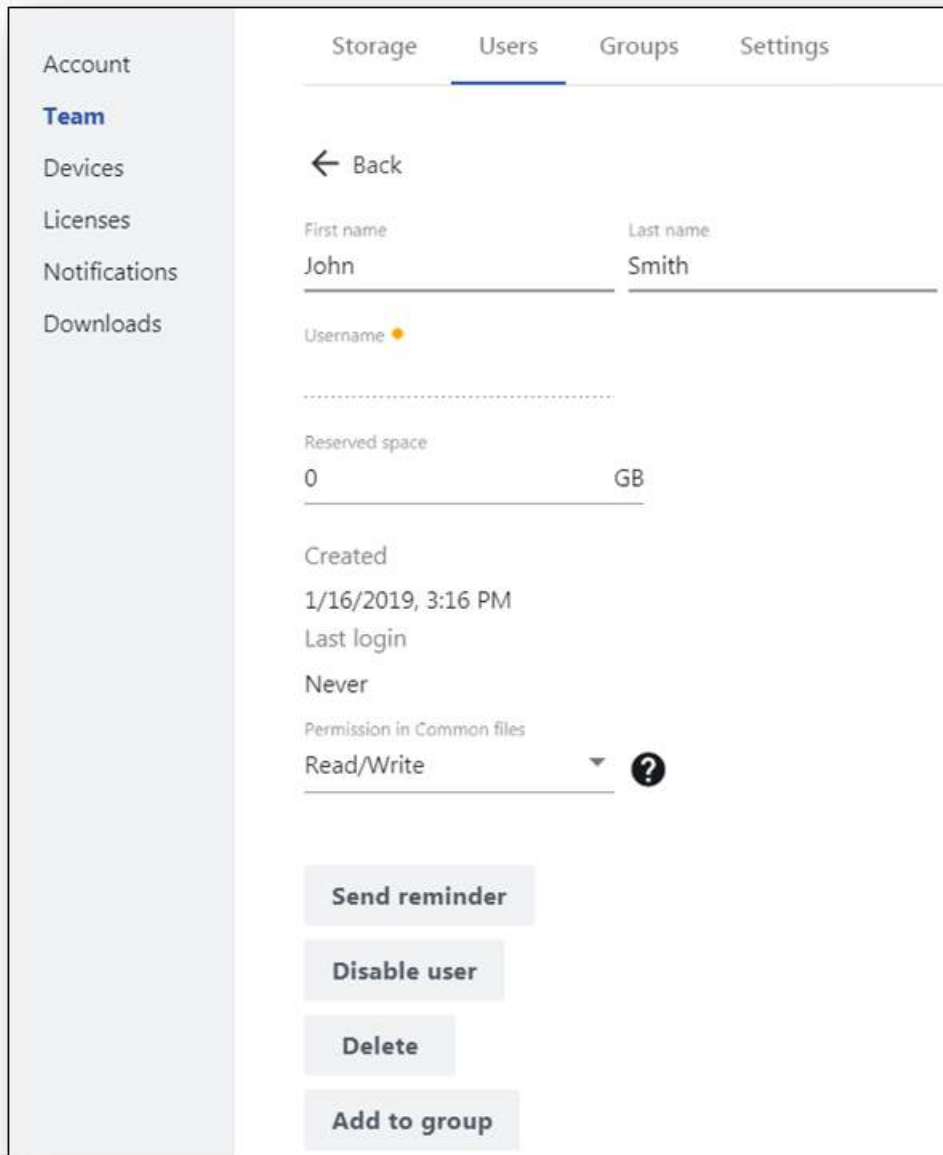
Figure 1-11: Add to Group

The second option for managing group users is under the Groups section. Select the group you would like to add user(s) to and then click **Add users** (Figure 1-12). Select the user(s) you want to add by clicking the check-box to the right of the user and then click **Add**. You can also remove users from the group by clicking on the "X" next to the user(s) you would like remove under "Users in this group".
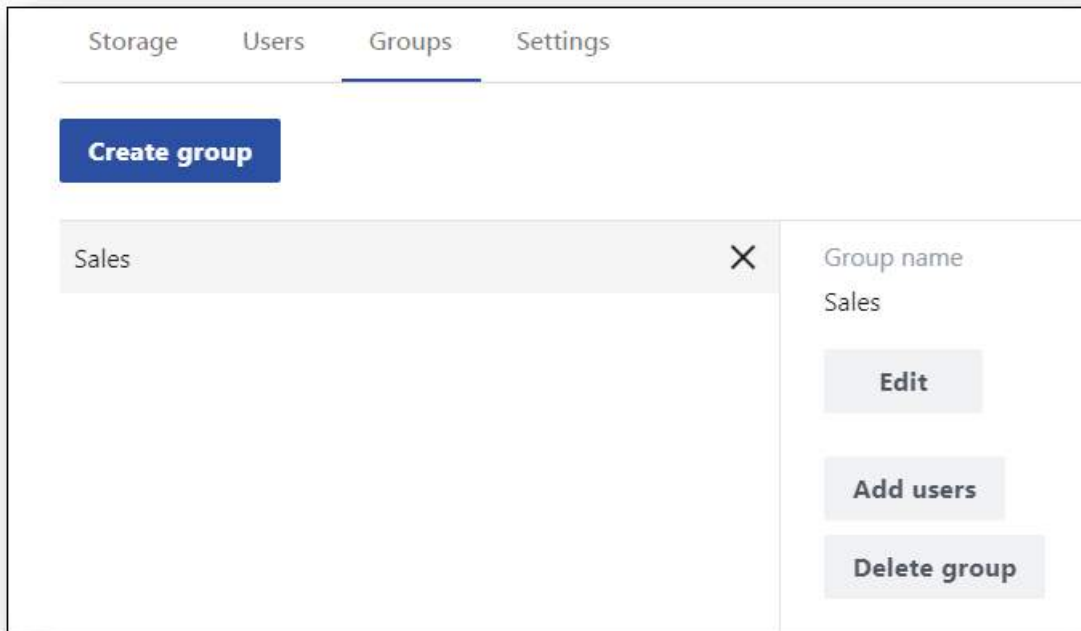
Figure 1-12: Add Users

Group Management - Editing and Deleting Groups

Change a group's name or delete a group from the individual group page shown above (Figure 1-12). You can also delete a group by clicking the "X" to the right of the group name.

Common Files

Common Files are designed to be shared between specified users or groups. Many administrators will create folders and assign user permissions at the admin level. While the majority of administrator functions are in the "Account" section, common files can be accessed by clicking **Common Files** on the navigation menu (Figure 1-13).
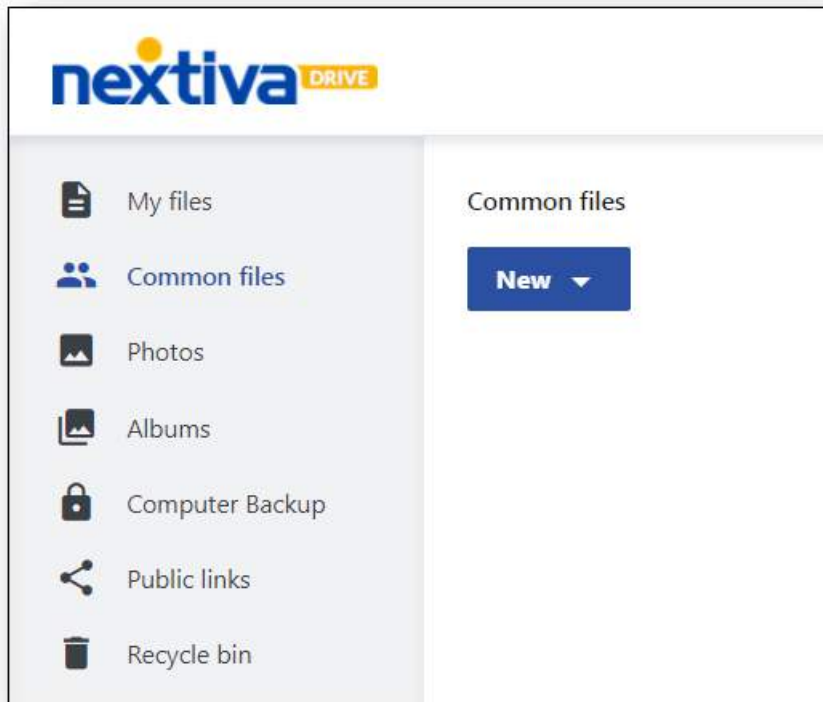
Figure 1-13: Common Files

You can upload files and folders as well as create new folders by clicking **New** under Common Files (Figure 1-13). To create a new folder, you will need to enter a folder name and then set access permissions for your users and/or groups (Figure 1-14).
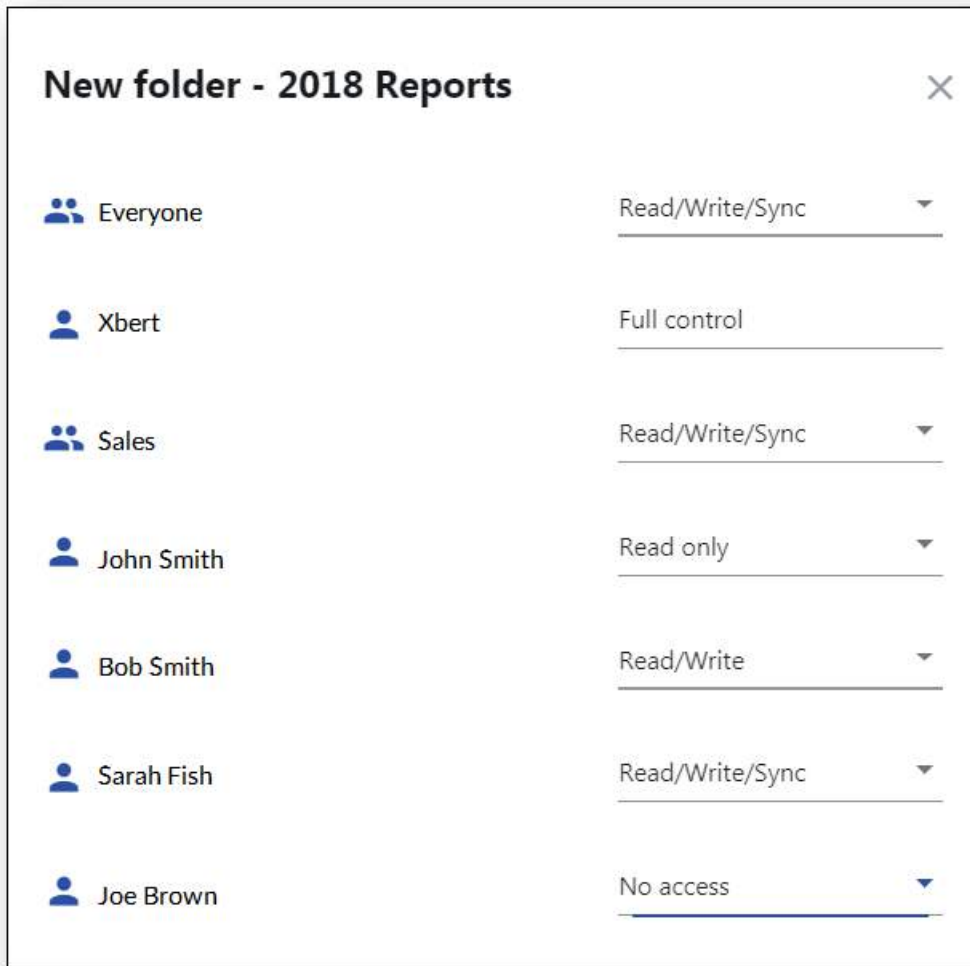
Figure 1-14: Access Permissions

To edit common files or folders, select the checkbox next to the file or folder and then click **More actions** ⋮ to rename, copy, or move the file or folder (Figure 1-15). Selecting **Permissions** allows you to edit the access permission set for that file or folder.

Figure 1-15: Actions Drop-Down Menu

Computer Backup

Clicking **Computer Backup** on the navigation menu will take you to the Backup section. After you install the Nextiva Backup client and perform an initial backup, you will see all your saved files (Figure 1-16).

Figure 1-16: Computer Backup

You can view and download specific files or folders from your backup, or restore everything to your computer using the Nextiva Backup client. Care must be taken when moving or deleting files in this section, especially if you have saved system files. Changing these files in the web portal can cause full system restores to fail. If system files in a backup must be changed, it is recommended that you make the changes on your computer and then use the Nextiva Backup client to update your backup.

My Files

Clicking **My Files** on the navigation menu will take you to the My Files section. After you install the Nextiva Sync client and perform an initial sync, you will see all your saved files listed here. You can upload files and folders as well as create new folders by clicking **New** (Figure 1-17).
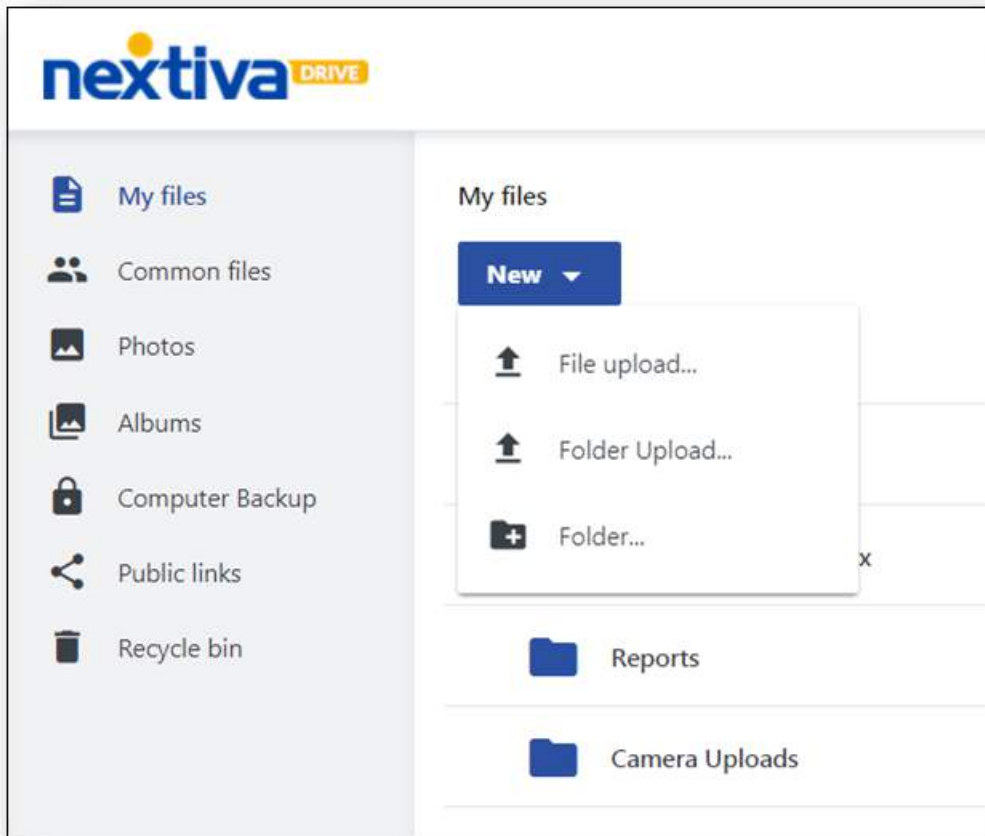
Figure 1-17: My Files

Select the checkbox next to any file or folder and click **More actions** ⋮ to rename, copy, or move any files contained in this section. To download a file, select the checkbox next to any file or folder and click **Download** ⬇ . Other features in this section also allow you to upload files instantly, share files with others, retrieve deleted files, and view/manage common folders.

Web Portal File Upload

While in the My files or Common files section, you can drag and drop files or folders for instant upload to your Nextiva Drive account, or you can click **New** and select the folder(s) or file(s) you wish to upload (Figure 1-17).

Sharing

You can share any file or folder in My files, or within Common files, via social media or through private email invitation. These shared files can be viewed by anyone you designate, and they don't have to have a Nextiva Drive account. To share a file or folder, select the checkbox next to the file or folder, and click the **Share** button ⯇ . A window will pop up, listing all of you sharing options (Figure 1-18). To share with specific individuals, click the **Send link** ✉ button and enter their email addresses in the email field. You have the option to include a message for the recipients and password protect the shared files. Please note that the password is not included in the email

message and must be provided to the recipients directly. Alternatively, you can share these items via various social media options such as Facebook, LinkedIn, and Twitter.

Figure 1-18: Sharing Options

Files and folders that have been shared will display a Shared icon ⤴ between their name and the modified date. All shares can be viewed, modified, and deleted by clicking **Public Links** on the navigation menu (Figure 1-19). Deleting a share does not delete the files themselves, but just removes the shared access. If you create a share for multiple people, and later want to remove access for some people and not others, you will need to delete the entire share and create a new one.
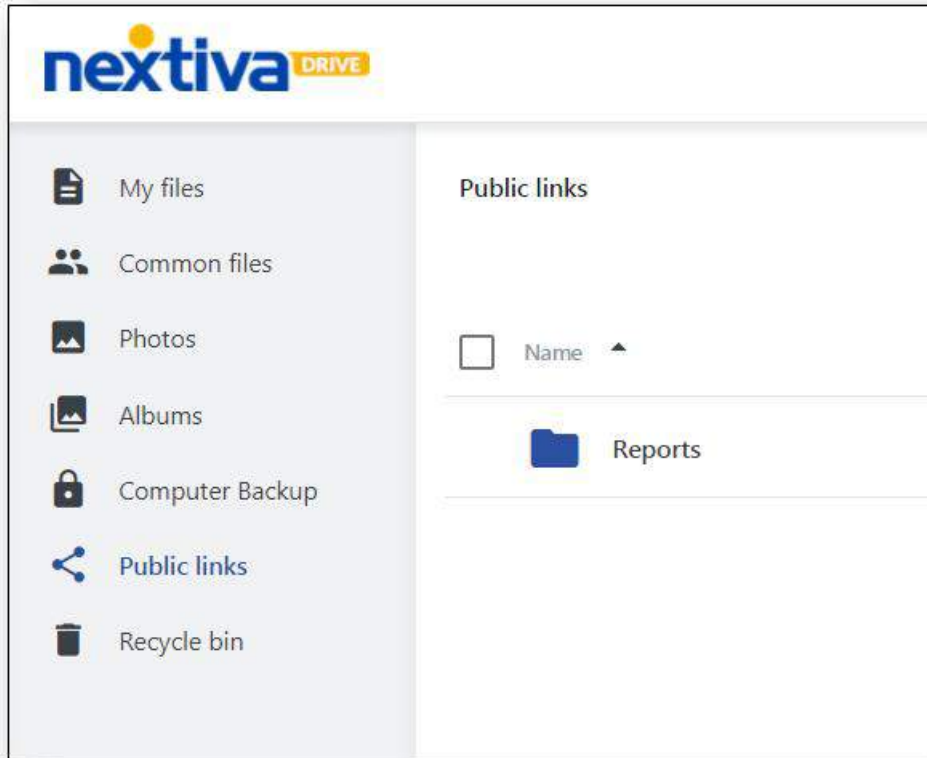
Figure 1-19: Public Links

Recycle Bin

By default, Nextiva Drive saves all manually deleted files for 30 days in the account recycle bin. You can view, restore, and permanently delete these files by clicking the checkbox next to any file or folder and then selecting an option from the actions toolbar (Figure 1-20).
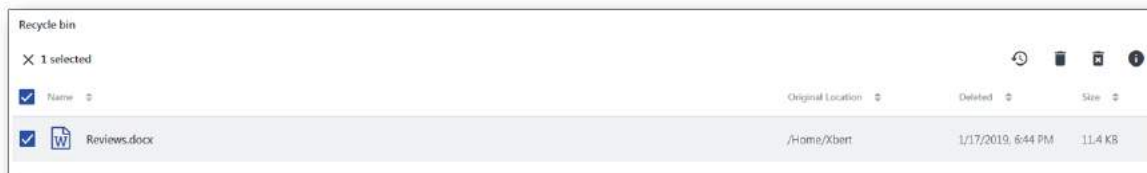

Figure 1-20: Recycle Bin

The account administrator can turn off the recycle bin feature in the Account Settings by going to the Team section and changing the option under "Settings".