



Panzura Edge: Desktop App for Windows OS

Version 1.0 — April 3rd, 2025

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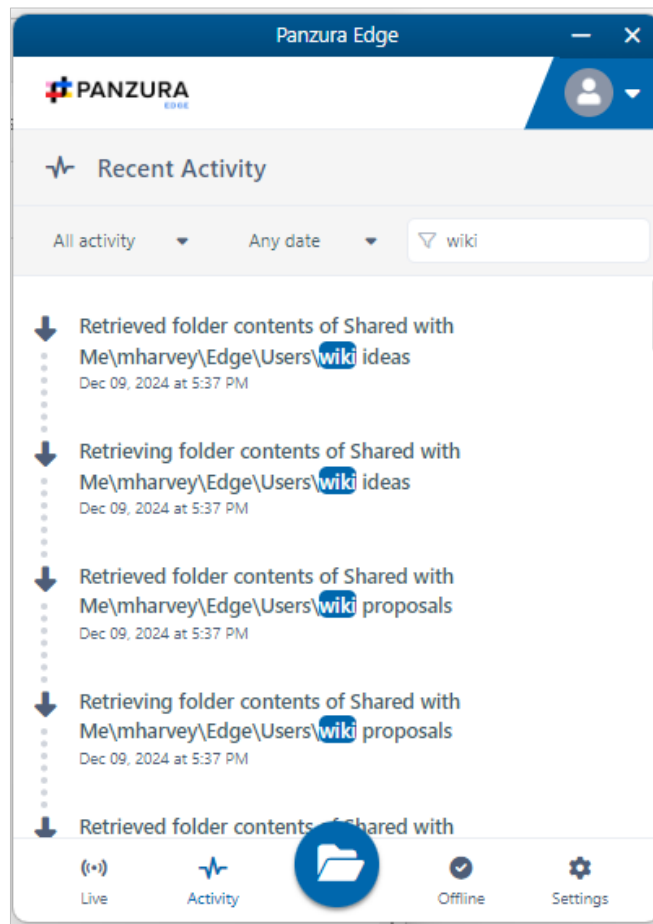
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What does Panzura for Office do?51

Overview

Panzura Edge Desktop for Windows enables you to access your Panzura Edge files and folders in Windows file explorer, where you can work with them online or make them available offline. Changes you make to offline files stored in Panzura Edge are immediately synced to the copies in Panzura Edge.

Panzura Edge Desktop for Windows opens as a dashboard that shows you live and recent actions and the folders you have downloaded offline, and also gives you access to user settings:



When you open Panzura Edge Desktop, its Panzura Edge folder becomes available in your Windows explorer. From there, you can work with your files online, or download them and work with them offline. Your online files and folders appear with cloud icons beside them. When you work with them, you are working with the copies in Panzura Edge, and if you view your user portal, you can see the modifications there. Your folders downloaded from Panzura Edge Desktop as offline folders and their files are marked with green icons with white check marks. When you work with them, you are working with downloaded copies of the files in Panzura Edge offline folders, and if you go offline, your changes are not synchronized to Panzura Edge until you go back online.

Panzura Edge Desktop App for Windows OS

If you open a file in Window Explorer's Panzura Edge folder with the Windows Open or Open with options the file is downloaded, but not into Panzura Edge Desktop's offline folders and it is not synced with Panzura Edge when you go online. These files are marked with a white icon with a green check mark.

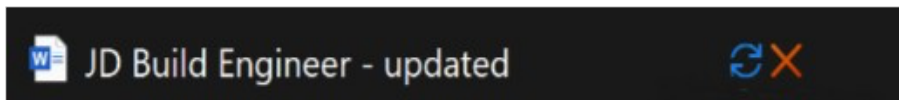
Name	Status	Date modified	Type	Size
IMG_2400.PNG	Cloud icon	9/25/2023 9:14 PM	PNG File	167 KB
IMG_2402.PNG	Cloud icon	9/25/2023 9:14 PM	PNG File	186 KB
IMG_2403.PNG	Cloud icon	9/25/2023 9:15 PM	PNG File	226 KB
IMG_2404.PNG	Cloud icon	9/25/2023 9:15 PM	PNG File	296 KB
IMG_2405.PNG	Cloud icon with green checkmark	9/25/2023 9:16 PM	PNG File	258 KB
IMG_2406.PNG	Cloud icon	9/25/2023 9:17 PM	PNG File	290 KB
IMG_2407.PNG	Cloud icon	9/25/2023 9:17 PM	PNG File	364 KB
IMG_2408.PNG	Cloud icon	9/25/2023 9:17 PM	PNG File	309 KB
IMG_2409.PNG	Cloud icon	9/25/2023 9:21 PM	PNG File	158 KB
Panzura Edge Architecture.docx	Cloud icon with green checkmark	7/13/2023 4:23 AM	Microsoft Word D...	1,464 KB
PanzuraEdge_LoggingUserPortal_1.0.docx	Cloud icon	7/28/2023 1:59 AM	Microsoft Word D...	1,092 KB

Sync Status

If a file or folder is currently being synced with Panzura Edge, a double arrow icon appears in the Status column:



If a file or folder is waiting to be synced with Panzura Edge, a double arrow icon with an x icon next to it appears in the Status column:



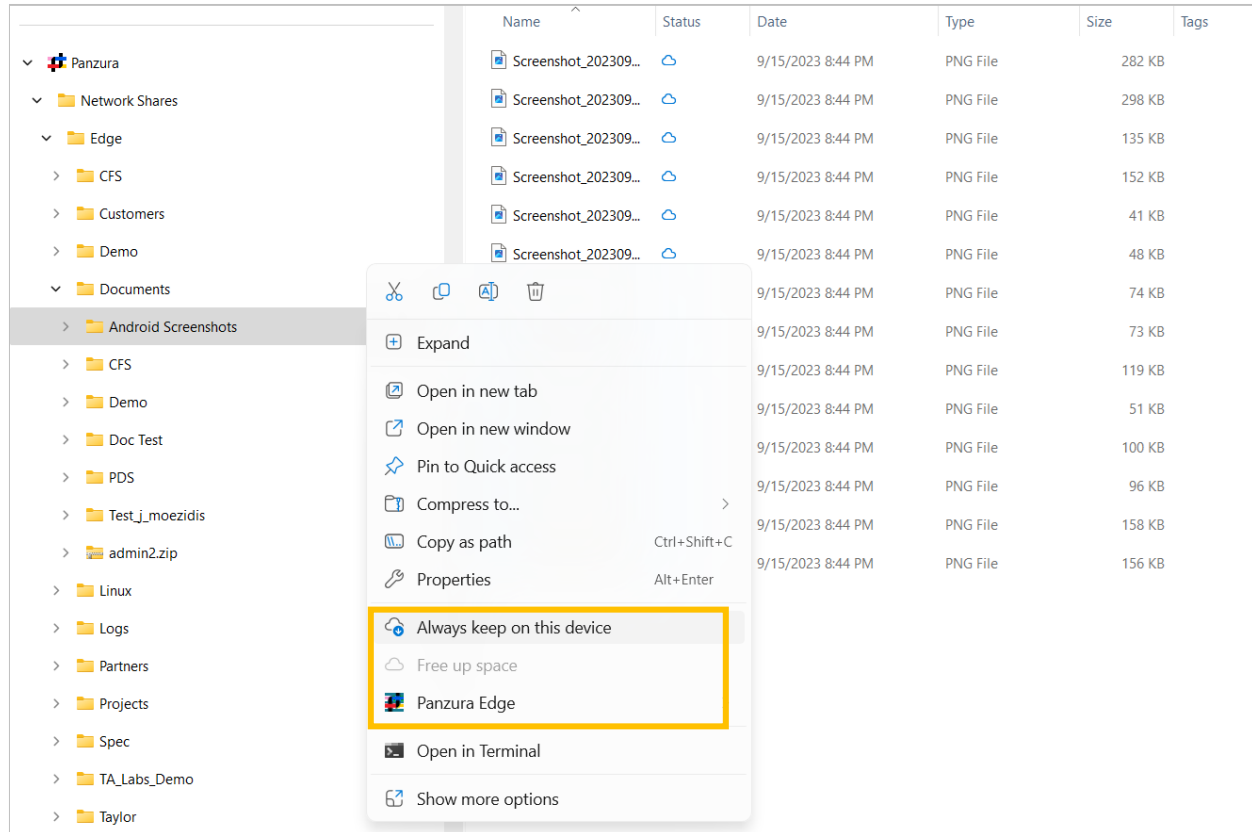
If a file or folder is only available online, and therefore cannot be synced, a cloud icon with a not available offline icon appears in the Status column:



When you right-click on a file or folder in the Panzura Edge Desktop folder, the options Always keep on this device, Free up space, and Open in Browser appear in the context menu. These options enable you to make files and folders available offline, remove downloaded copies to free up space, and to open a file or folder in the Panzura Edge user portal.

Note: You may have to right-click directly on the file or folder name to view these options.

Panzura Edge Desktop App for Windows OS



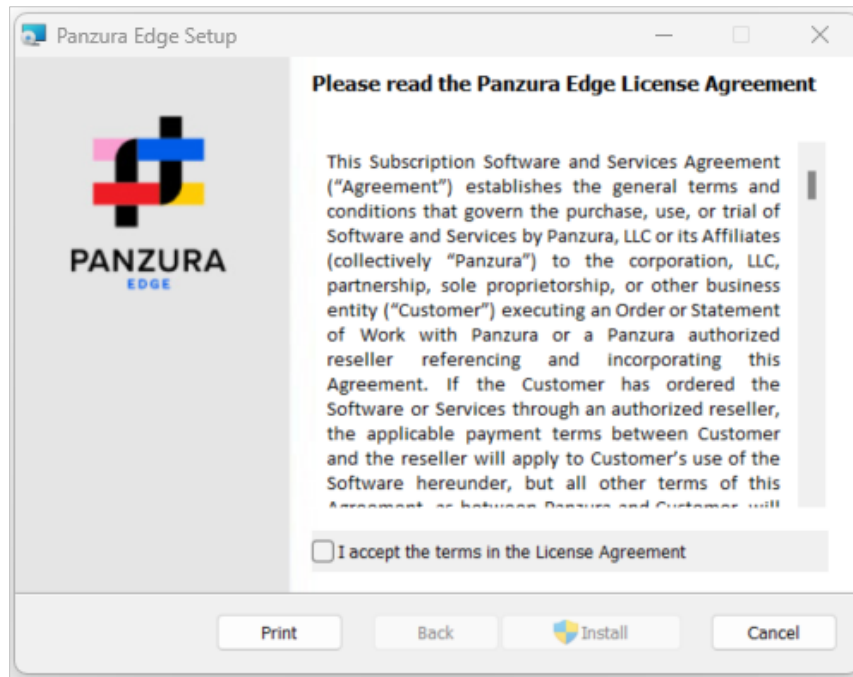
Panzura Edge Desktop automatically installs with [Panzura Edge for Office](#), which enables you to automatically lock and unlock Office files and share them when you open them from the Panzura Edge Desktop directory.

Begin by installing Panzura Edge Desktop, and then try out its various functions.

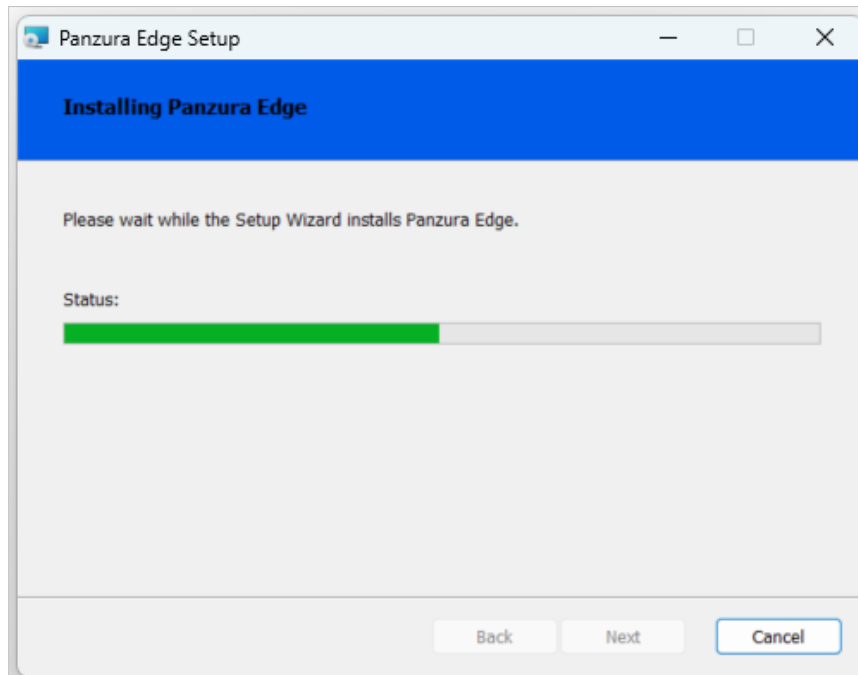
Installing Panzura Edge Desktop for Windows

To install Panzura Edge Desktop on Windows:

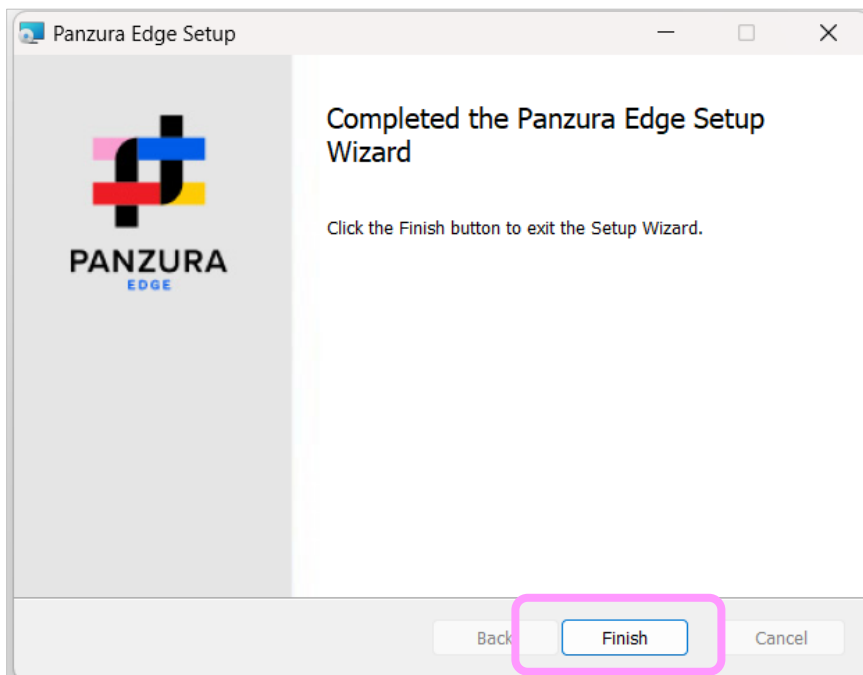
1. Install or upgrade to Panzura Edge 23.232 if you have not already done so.
2. Unzip and run Panzura EdgeDesktopInstaller.pkg. The installer's welcome screen opens:



3. Read and accept the license agreement. Click I accept the terms in the License Agreement and then click Install.
4. The Panzura Edge Setup wizard displays the installation status.



5. After the installation is complete, the following screen is displayed:



6. Click Finish. The Panzura Edge Desktop login page opens.

Panzura Edge

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Welcome

Log in to your account

Please log in using one of the methods below.

Login Method

Password

SSO

Device Authorization Code

Server URL

https://

Account Name

Account

Password

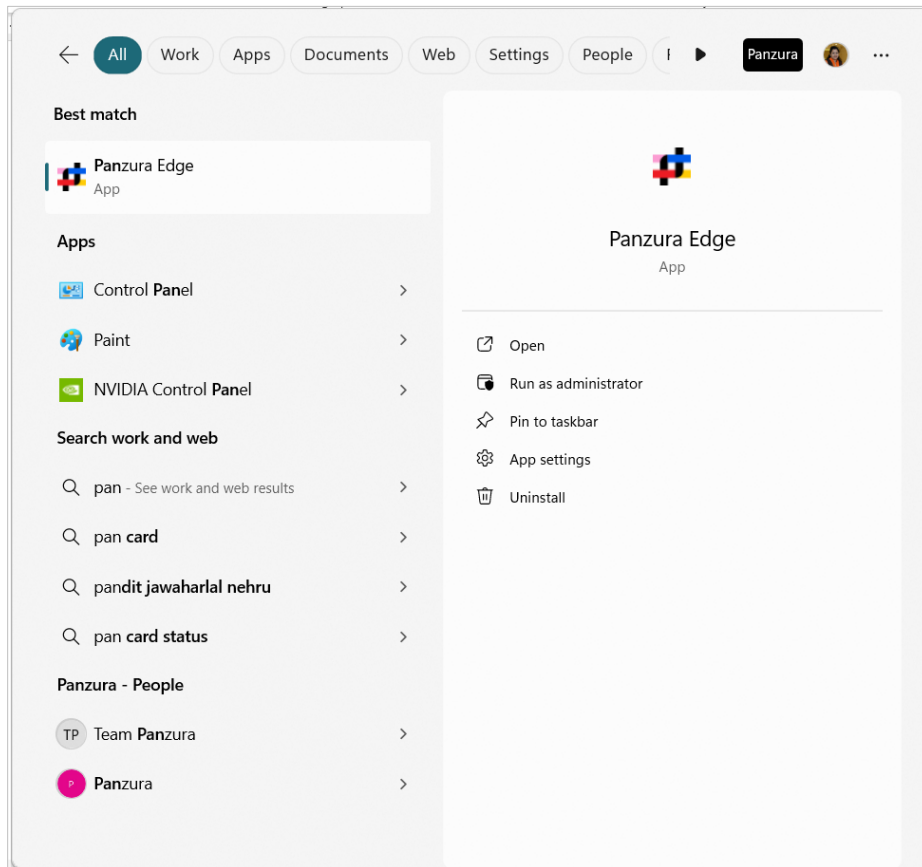
👁

Log in

Opening and Logging in to Panzura Edge Desktop in Windows

After the installation is complete, the Panzura Edge Desktop the login page opens. By default, it will then automatically open each time you start your computer. If you prefer it not to open on startup, you can change this setting in [Panzura Edge Desktop](#).

To open Panzura Edge Desktop's login screen, search for Panzura Edge Desktop in the Windows Start menu, and choose Open.



Log in to your account

Log in to your Panzura Edge account using the server address provided at the time of your Panzura Edge account using one of the three methods.

Log in with Password

1. In the Log in screen, select Password as the Login Method.
2. Enter your Server URL, Account Name (username) and associated Password.

3. Click Log in.

Panzura Edge

Welcome

Log in to your account

Please log in using one of the methods below.

Login Method: **Password** | SSO | Device Authorization Code

Server URL:

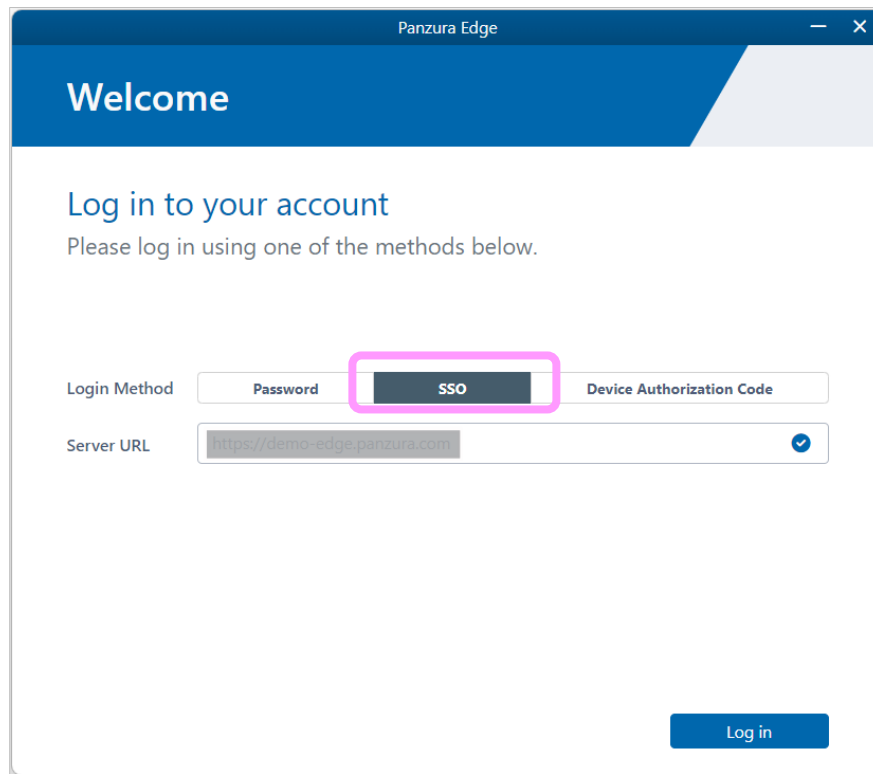
Account Name:

Password:

Log in

Log in with Single-Sign On (SSO)

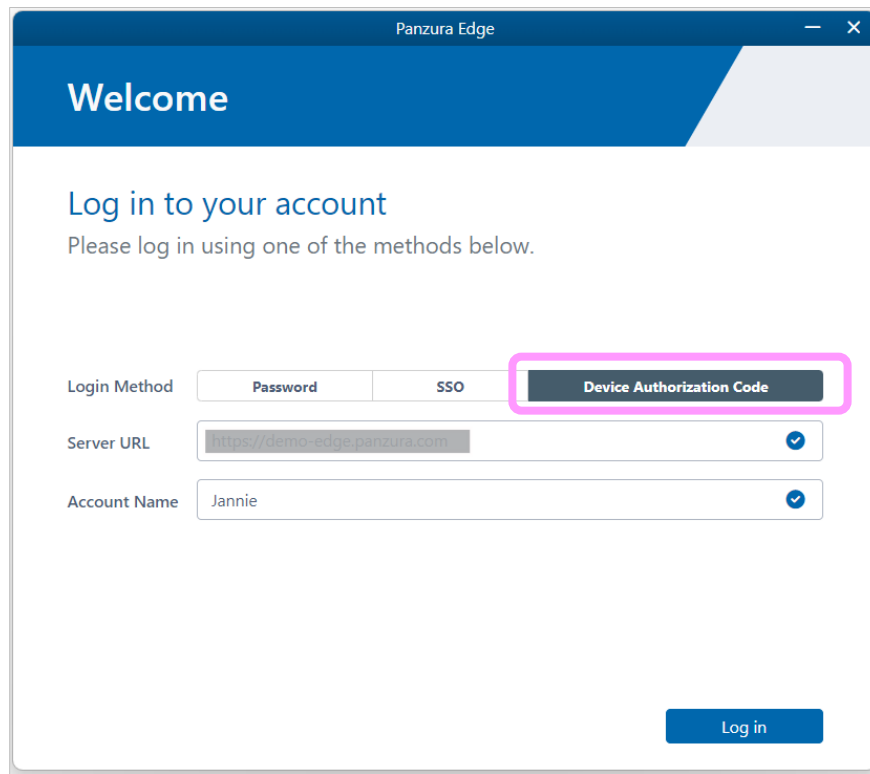
1. In the Log in screen, select SSO as the Login Method.
2. Enter the Server URL.



3. Click Log in. You will automatically be redirected to the SSO Login page.
4. In the Sign in to your account:
5. Enter Account Name (username) and associated Password.
6. Click Sign in.

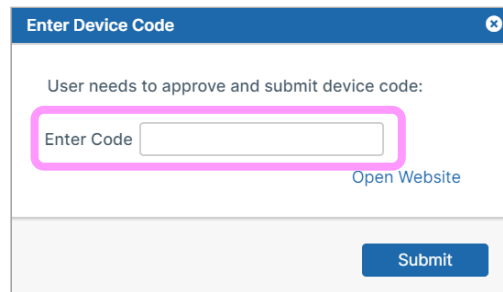
Log in with Device Authorization Code

1. In the Log in screen, select Device Authorization Code as the Login Method.
2. Enter your Server URL, and Account Name (username).
3. Click Log in.




The image shows the 'Panzura Edge' login window. It has a blue header with the title 'Welcome'. Below the header, it says 'Log in to your account' and 'Please log in using one of the methods below.' There are three login methods: 'Password', 'SSO', and 'Device Authorization Code'. The 'Device Authorization Code' method is highlighted with a pink box. Below the login methods, there are two input fields: 'Server URL' with the value 'https://demo-edge.panzura.com' and 'Account Name' with the value 'Jannie'. Both fields have a blue checkmark icon to their right. At the bottom right, there is a blue 'Log in' button.

4. In the Enter Device Code screen, click Open Website to open the Panzura Edge user portal.



The image shows the 'Enter Device Code' screen. It has a blue header with the title 'Enter Device Code'. Below the header, it says 'User needs to approve and submit device code:'. There is an input field labeled 'Enter Code' which is highlighted with a pink box. To the right of the input field, there is a blue link that says 'Open Website'. At the bottom right, there is a blue 'Submit' button.

5. Log in to the Panzura Edge user portal.
6. In the user portal, click on your username and select Settings.
7. In the Settings screen, go to the Devices tab and to approve the sign in, click the check symbol next to the listing for Panzura Edge Desktop.

General Devices Notifications				
				<button>Refresh</button>
Device Name	Device Details	Last Login	Device Status	Actions
 Desktop Edit (ITSe-5662)	OS: macOS 22.1.0 App: 22.1.0.8079	2023-06-02 11:29:58	Needs Approval	✓ ✕

8. A dialog box displays the device authentication code. Copy this code and enter it in the [Enter Device Code dialog box](#).
9. Click Submit.

Logging in moves through a few screens introducing you to Panzura Edge Desktop, and then opens the Panzura Edge Desktop dashboard.

Panzura Edge Desktop dashboard

The Panzura Edge Desktop dashboard opens to the Live screen.

The first time you log in, the Live tab appears empty. If this is the first time you have logged in to Panzura Edge Desktop, each file and folder should appear with a cloud icon next to it, which indicates that it hasn't been downloaded locally (made available offline) yet.

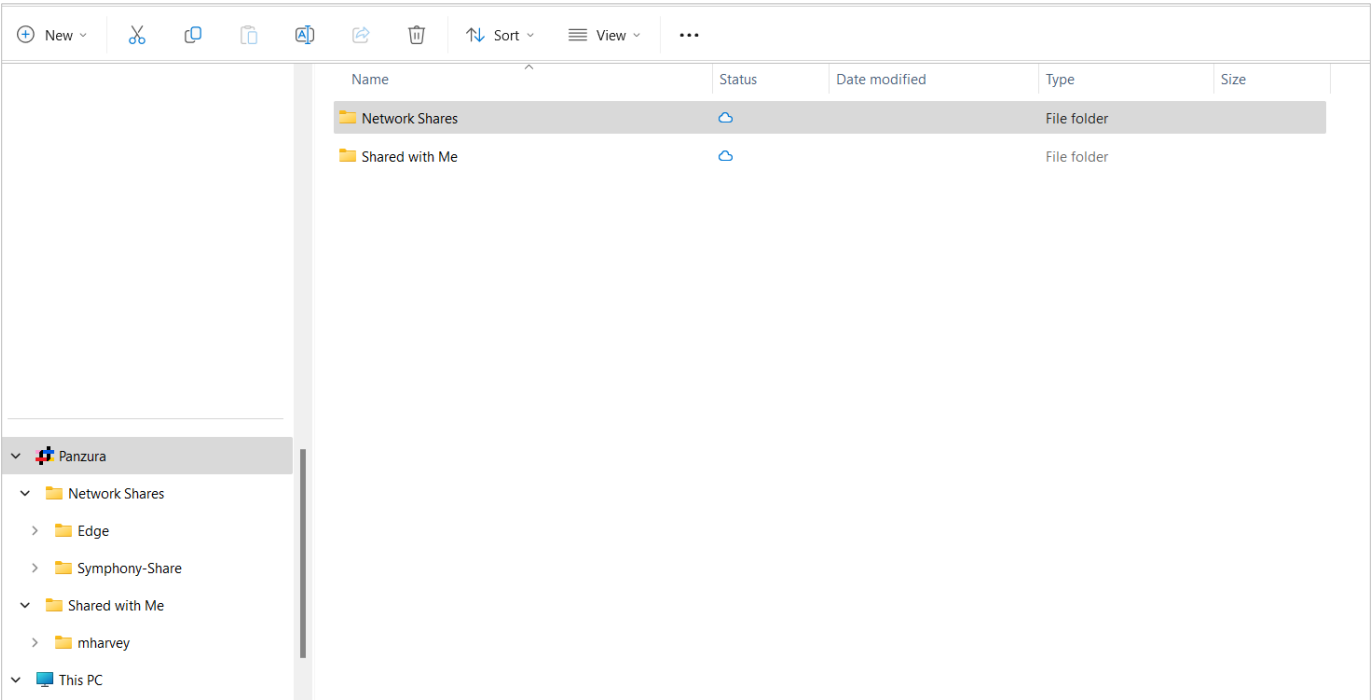
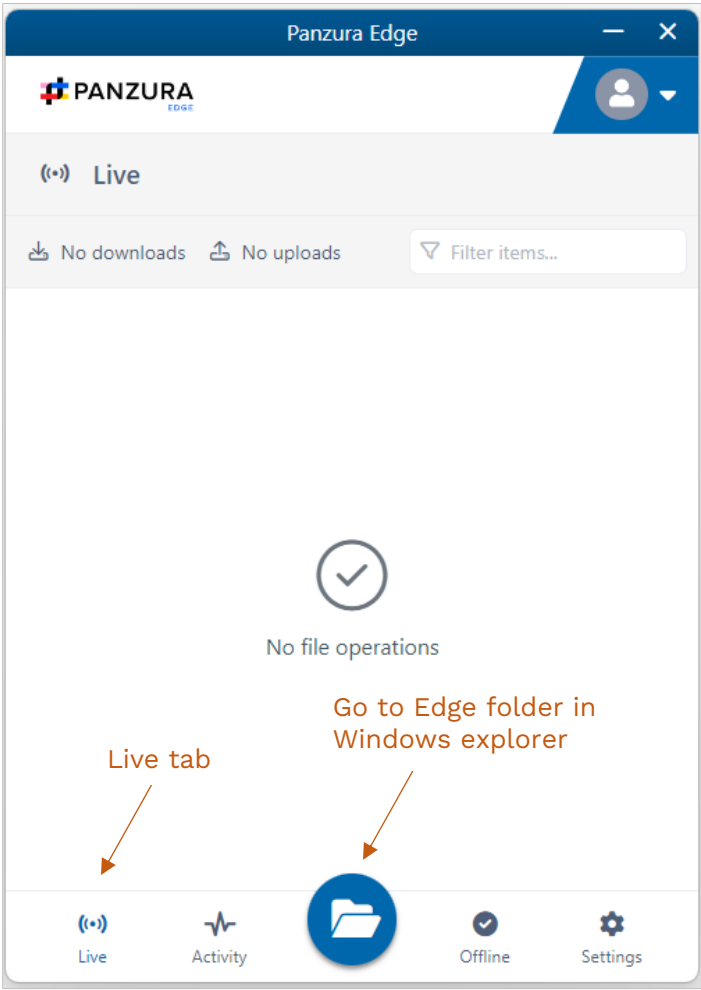
Panzura Edge Desktop cannot begin tracking and synchronizing online and offline Panzura Edge file activity until you download Panzura Edge folders and files to your local drive.

Click the folder icon at the bottom of the Panzura Edge Desktop dashboard to view the Panzura Edge folder, which now appears in File Explorer.

Begin setting up Panzura Edge Desktop by [making Panzura Edge files and folders available offline](#).

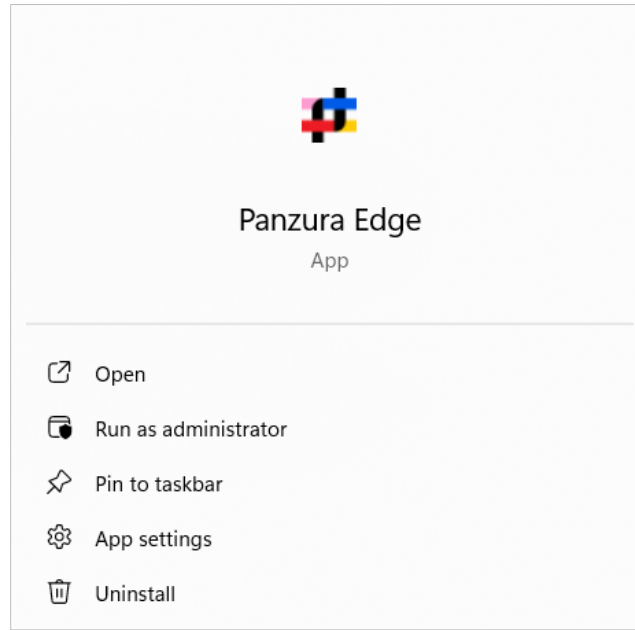
For more information about the dashboard, see [Using the Dashboard in Panzura Edge Desktop for Windows](#).

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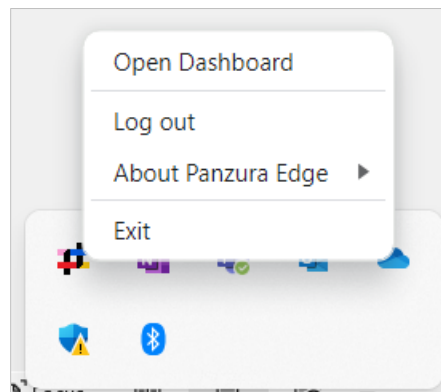


Working from the Panzura Edge Desktop for Windows Taskbar Icon

After you log in to Panzura Edge Desktop for Windows, a Panzura Edge icon appears in the taskbar. You can right-click on the icon to perform Panzura Edge Desktop tasks.



- Open Dashboard - Opens the Panzura Edge Desktop for Windows dashboard.
- Log out - Logs the currently logged in user out of Panzura Edge Desktop for Windows without shutting down the application.
- About Panzura Edge Desktop - Shows details about the Panzura Edge Desktop build.
- Exit - Closes the Panzura Edge Desktop for Windows application.

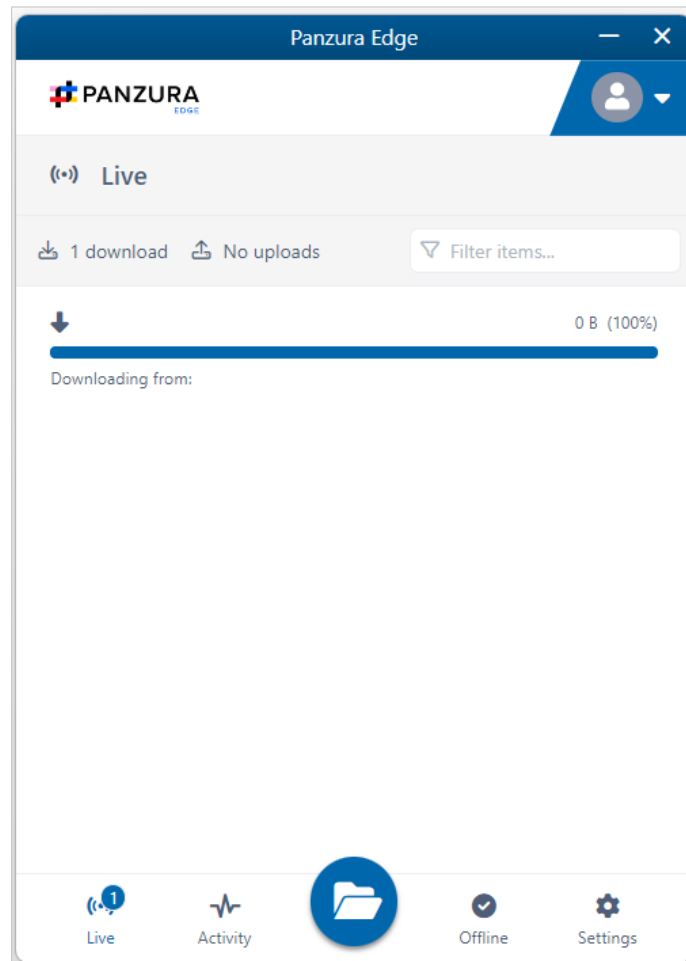


Using the Dashboard in Panzura Edge Desktop for Windows

Panzura Edge Desktop for Windows opens to its dashboard, which has the tabs Live, Activity, Offline, and Settings, and a button for opening your Panzura Edge website (in Windows explorer).

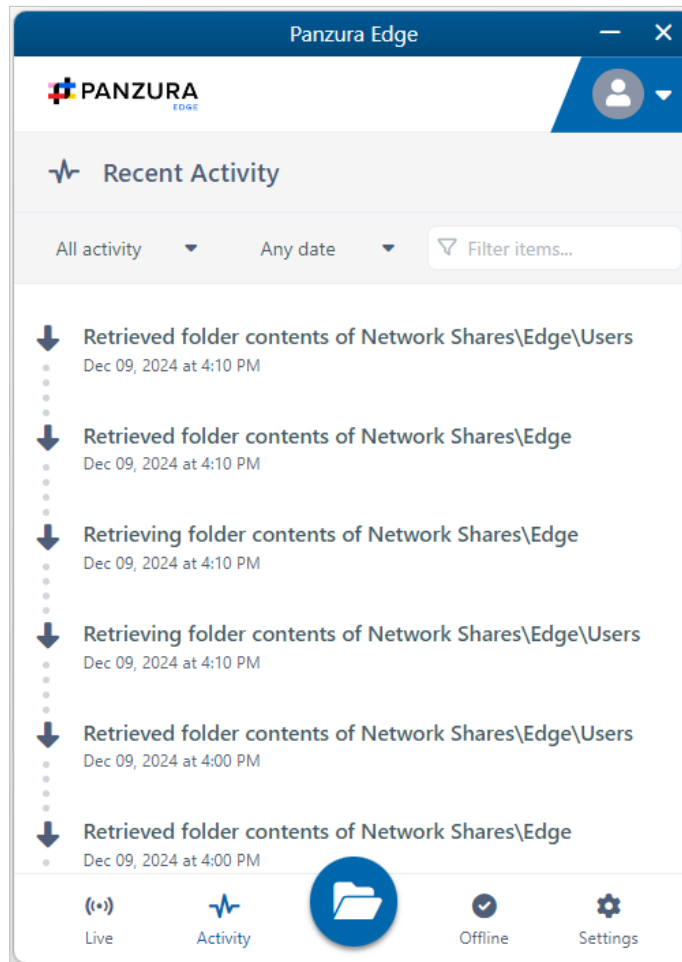
Live tab

The dashboard opens to the Live tab, which shows current uploads and downloads of files and folders. You will only see uploads and downloads that take a substantial amount of time in progress. To search for a file or folder in the list, enter a string from its name into the Filter items box.



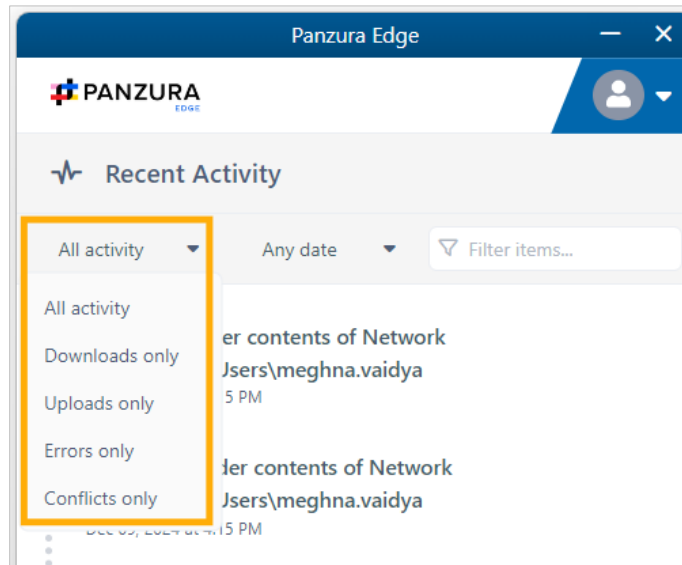
Activity tab

To view a list of recent Panzura Edge Desktop activities, click the Activity tab:

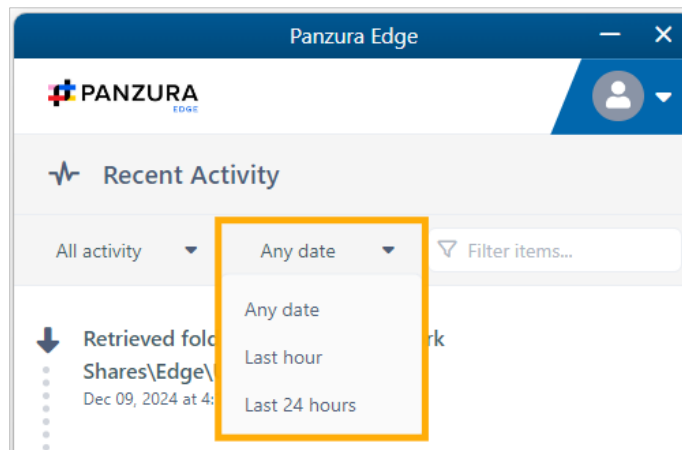


Filter activities on the Activity tab

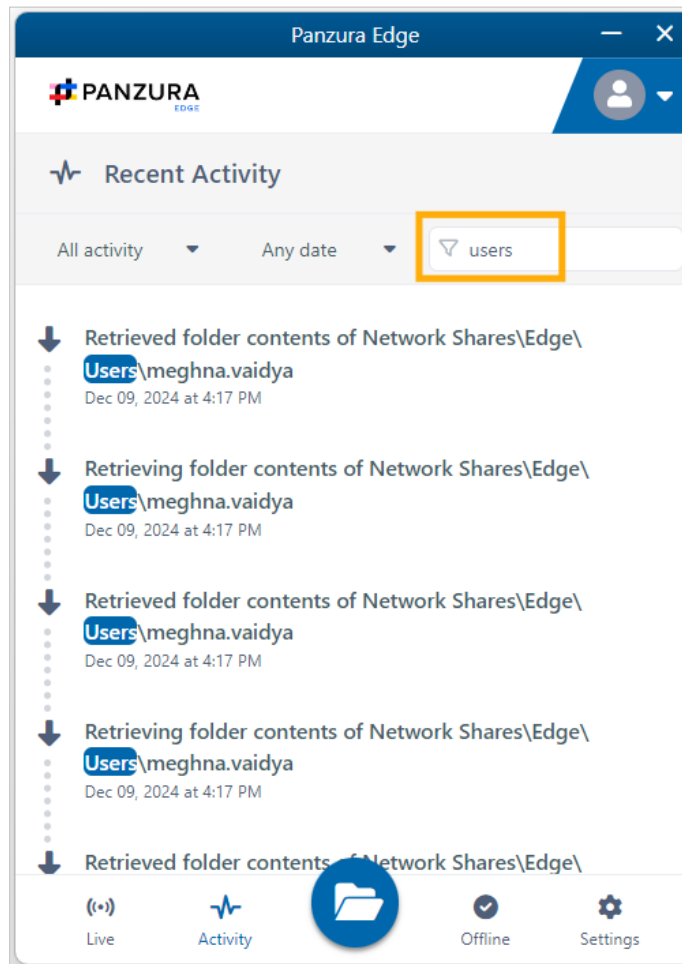
1. To filter activities by activity type, choose an option in the Activity drop-down list.



2. To filter activities by date, choose Any date, Last hour, or Last 24 hours in the Date drop-down list.

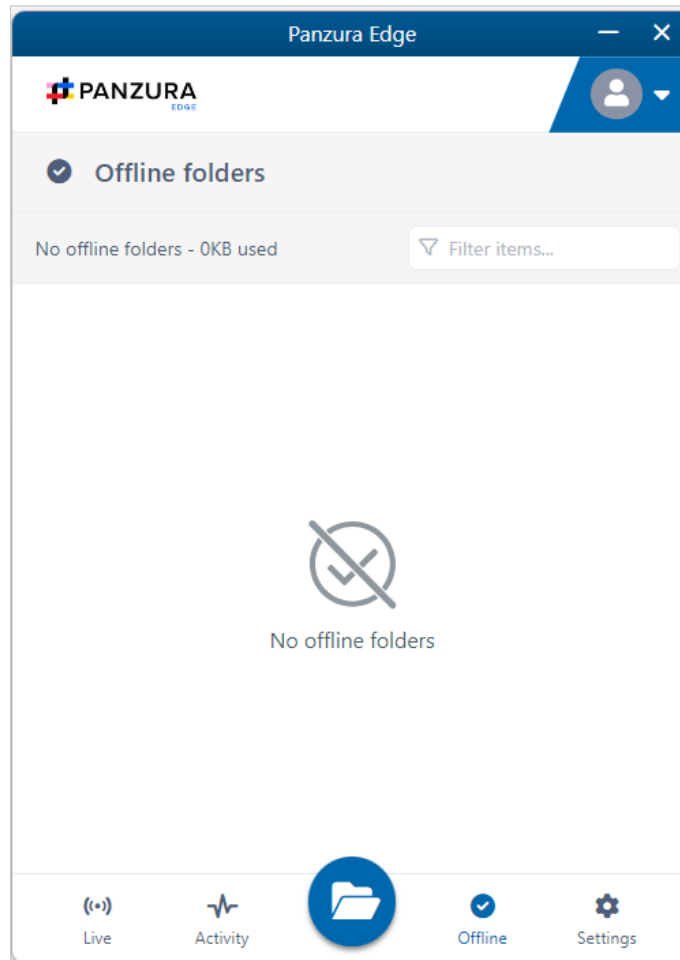


3. To filter by any string in the listing (including the action, file path, date, or time) enter the string into Filter items.



Offline tab

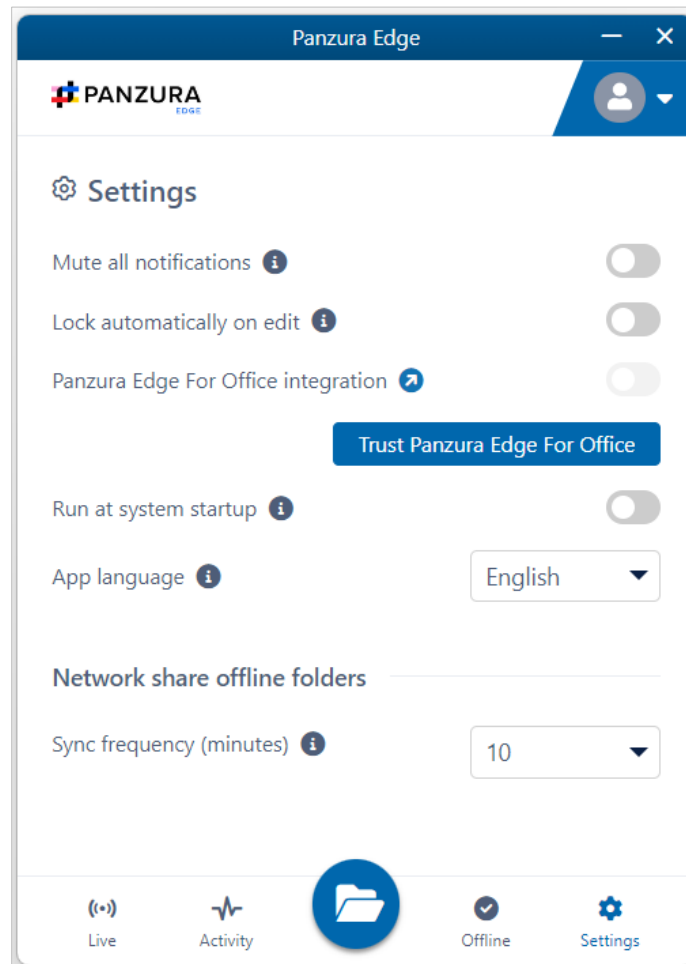
To view folders that you have [moved offline](#) using Panzura Edge Desktop, click the Offline tab.



1. To remove folders from the offline location from the Offline tab, select the folder and click Remove.
2. To open an offline folder in its location in Windows explorer, click the folder icon next to it.

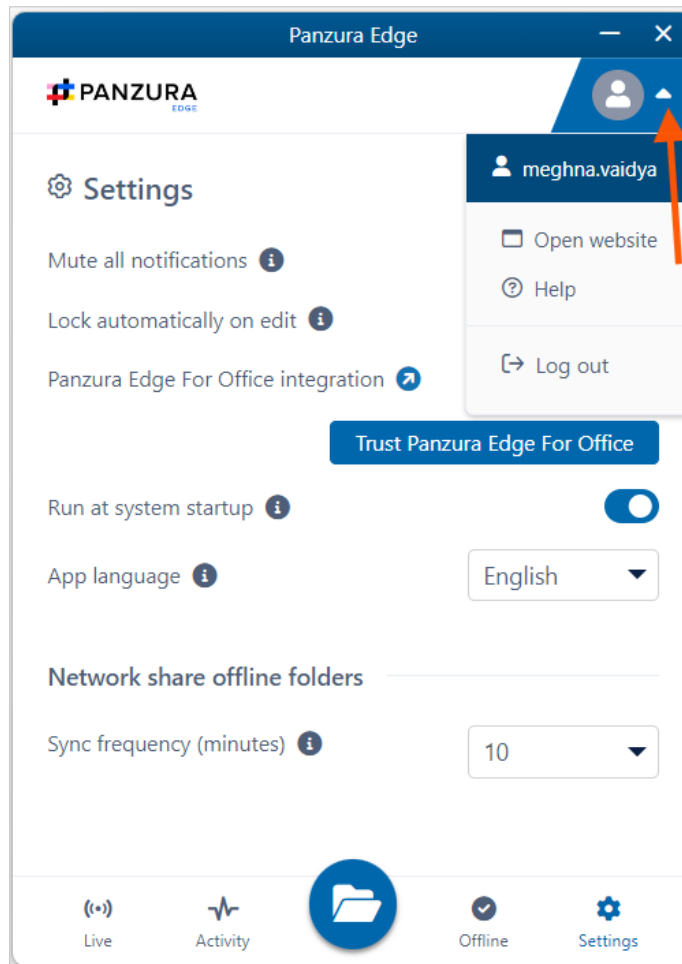
Settings tab

To view Panzura Edge Desktop for Windows settings, click the Settings tab.

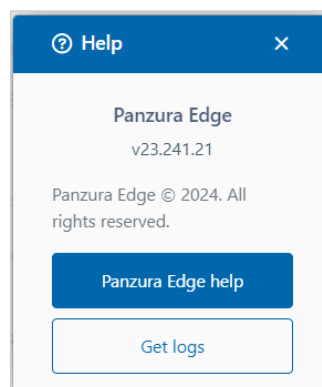


More Options

To access more options from the Panzura Edge Desktop for Windows dashboard, click the arrow next to the user image:

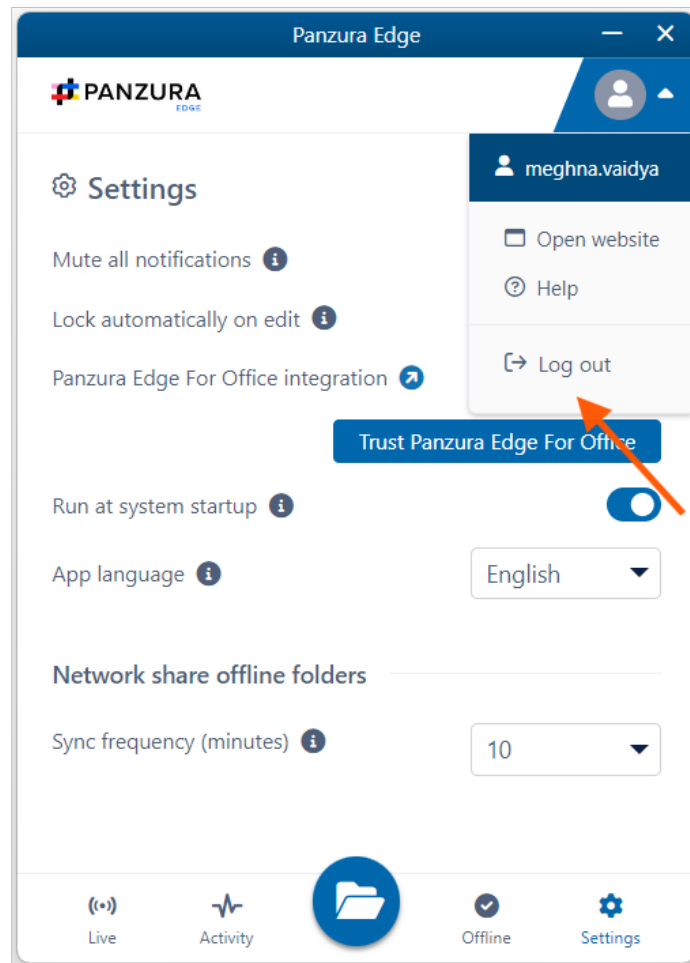


1. To open your Panzura Edge user portal, click Open website. For this end user help, log files, and the version of Panzura Edge Desktop for Windows that you are running click Help. The following dialog box opens:

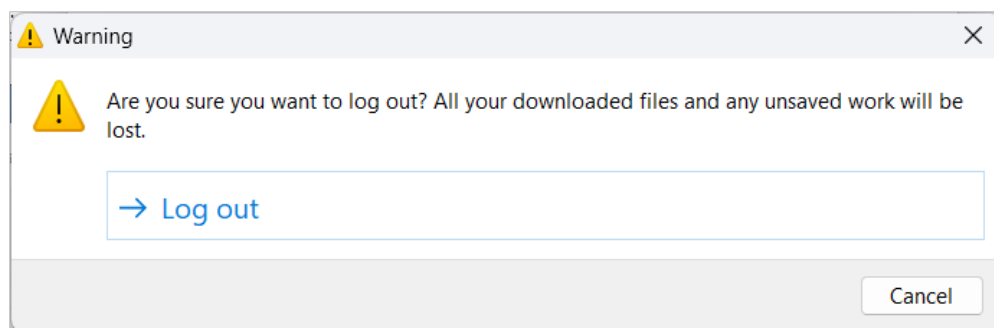


2. Click Panzura Edge Desktop help to access this end user help.

3. Click Get logs to access the contents of the Logs folder for Panzura Edge Desktop.
4. To log out of Panzura Edge Desktop for Windows, click Log out.



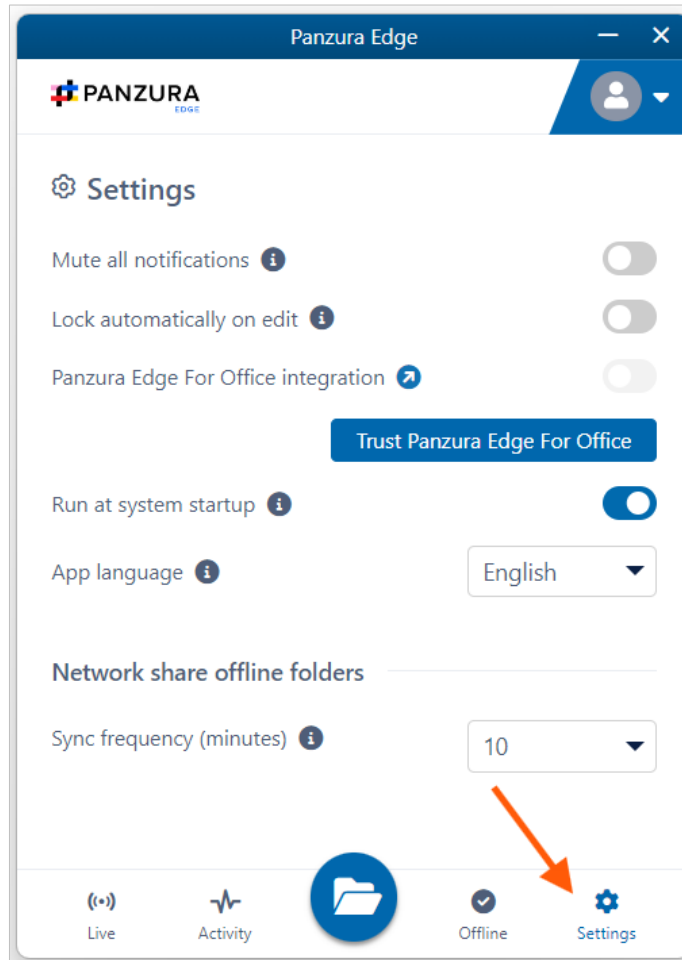
5. You are warned that logging out will clear and remove the Panzura Edge folder that appears in the Windows Explorer, and asked to confirm.



6. Click Log out.

Panzura Edge Desktop for Windows Settings

To change your settings in Panzura Edge Desktop, click the Settings tab at the bottom of the dashboard.



Setting	Description
Mute all notifications	When enabled, all notifications sent from Panzura Edge Desktop are turned off. Default is disabled.
Lock automatically on edit	<p>This feature is not available in the current Panzura Edge Desktop for Windows betaversion. The option may be set to enabled, but the feature remains disabled.</p> <p>When enabled, files opened for edit through Panzura Edge Desktop are locked, and other users cannot edit them. When the files are closed they are unlocked again. Default is disabled.</p>

Setting	Description
Trust Panzura Edge for Office/ Panzura Edge for Office integration	<p>Panzura Edge for Office is an add-in that allows users to:</p> <ol style="list-style-type: none"> 1. Automatically lock Office files when they open them 2. Share Office files while working with them in Panzura Edge clients <p>When you initially install Panzura Edge Desktop, the Trust Panzura Edge for Office button appears. Click it to use Panzura Edge for Office.</p> <p>After you click the button, it disappears, and the Panzura Edge for Office integration setting is enabled, which means Panzura Edge for Office is active.</p> <p>When Panzura Edge for Office is disabled, Panzura Edge Desktop does not integrate with Panzura Edge for Office.</p> <p>Default is disabled (Panzura Edge for Office is available and appears in Panzura Edge Desktop).</p>
Run at system startup	When enabled, begin running Panzura Edge Desktop when the system starts. Default is disabled.
App language	User interface language. Change to any of the language options. Default is English.
Sync frequency (minutes)	Interval between automatic sync events for Network Folders. Choose any interval in the drop-down list. Default is 10 minutes.

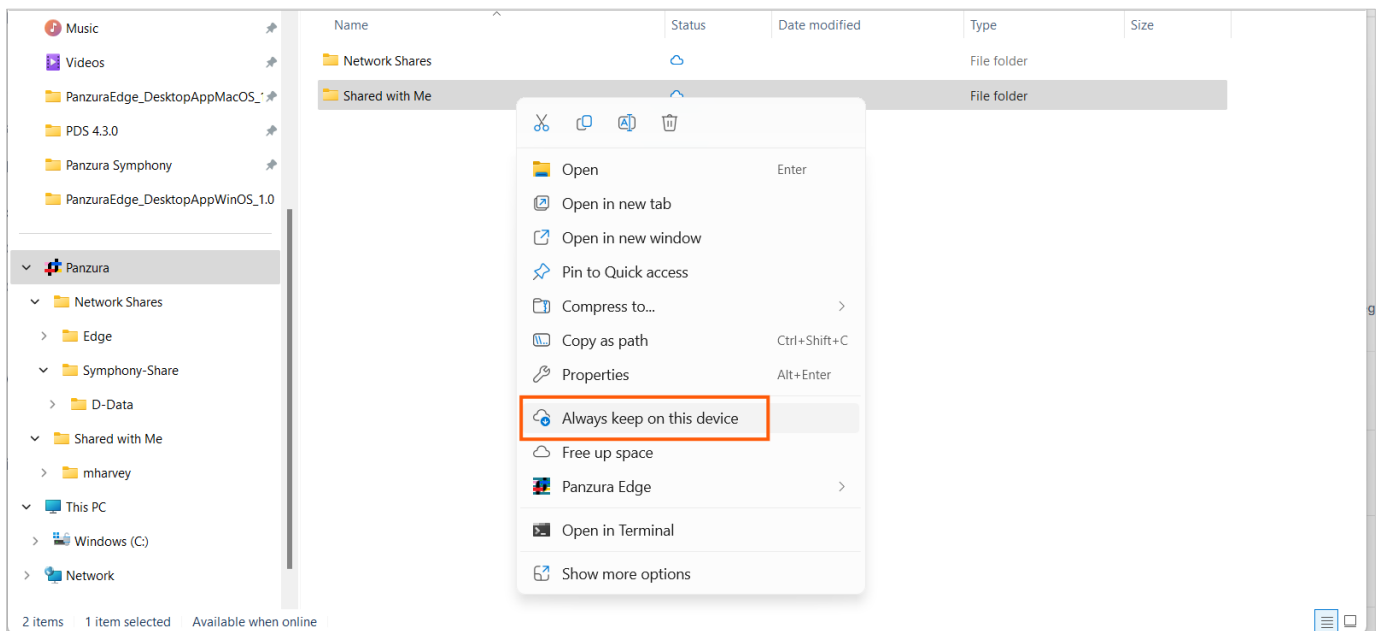
Make Files and Folders Available Offline in Panzura Edge Desktop for Windows

To use Panzura Edge Desktop for Windows to synchronize offline and online changes you make to Panzura Edge files and folders, first download the folders with contents that you want to synchronize.

When you log in to Panzura Edge Desktop, your Panzura Edge files and folders become available in File Explorer in a Panzura Edge folder:

Make files and folders available offline

1. In File Explorer, locate the Panzura Edge folder.



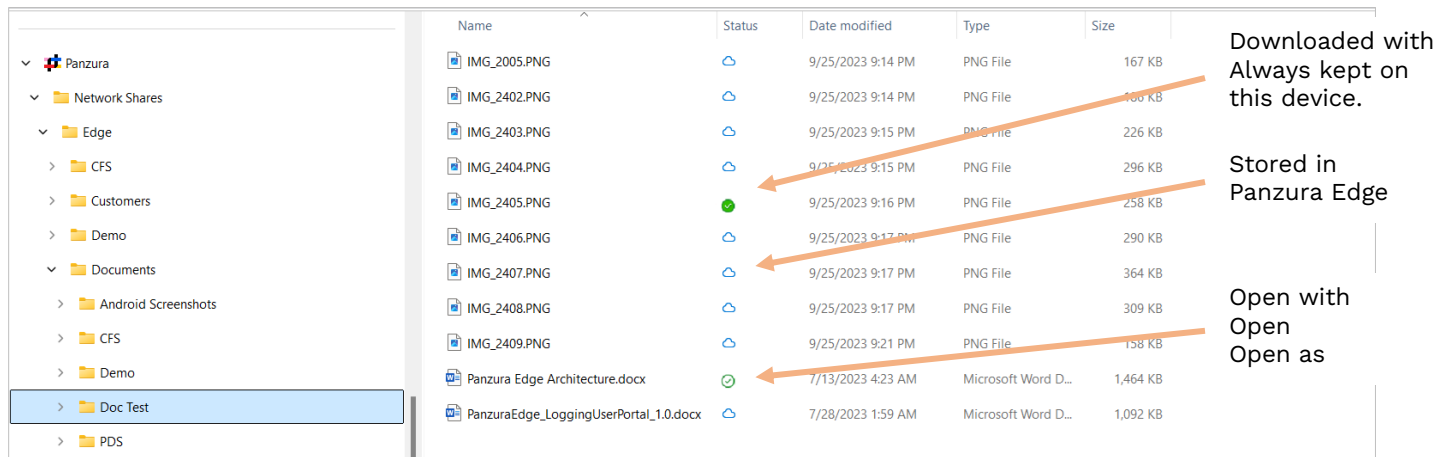
2. Right-click on each file or folder that you want to be able to synchronize, and choose Always keep on this device.

Note: You may have to right-click directly on the file or folder name to bring up the correct options.

Panzura Edge downloads the file or the folder and its contents to your local drive (and moves it into its offline folder) and replaces the cloud icon with a green circle icon to indicate that it is available offline. Changes to the offline files are now synced with the copies in Panzura Edge.

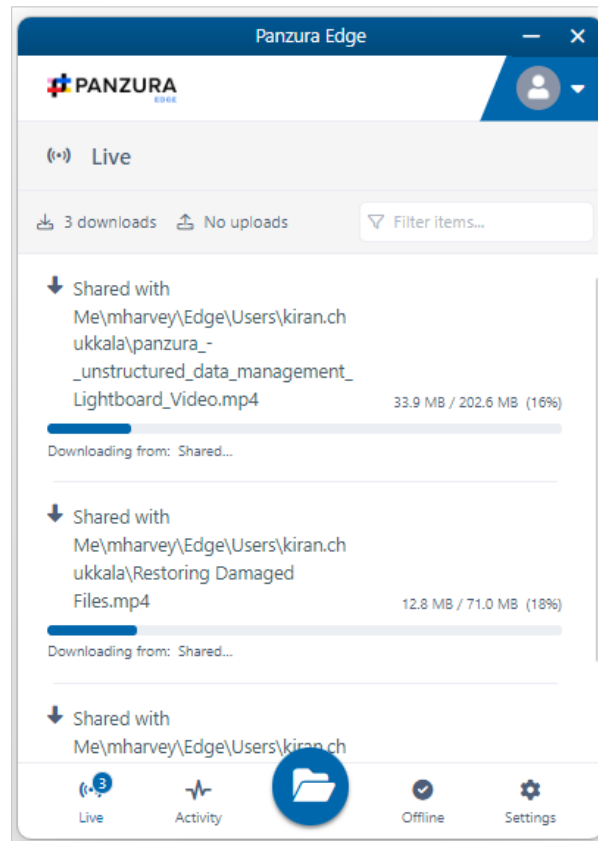
Note: If you click Open or Open with next to a file you can edit it offline, but its changes aren't synced with Panzura Edge. A file downloaded with Open has a white circle icon with a green check. You are still able to choose Make available offline and put it into a Panzura Edge offline folder that will sync with Panzura Edge.

Panzura Edge Desktop App for Windows OS



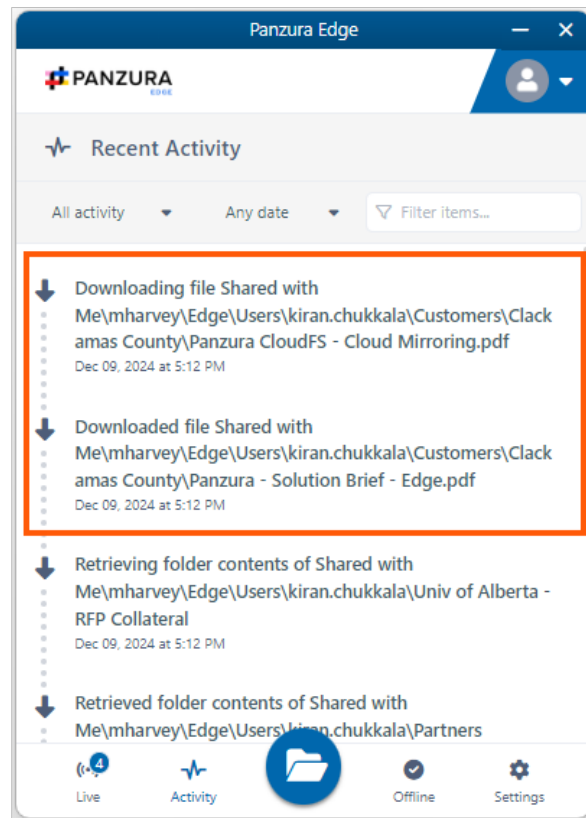
Name	Status	Date modified	Type	Size
IMG_2005.PNG	Downloaded with Always kept on this device.	9/25/2023 9:14 PM	PNG File	167 KB
IMG_2402.PNG		9/25/2023 9:14 PM	PNG File	168 KB
IMG_2403.PNG		9/25/2023 9:15 PM	PNG File	226 KB
IMG_2404.PNG		9/25/2023 9:15 PM	PNG File	296 KB
IMG_2405.PNG		9/25/2023 9:16 PM	PNG File	258 KB
IMG_2406.PNG		9/25/2023 9:17 PM	PNG File	290 KB
IMG_2407.PNG		9/25/2023 9:17 PM	PNG File	364 KB
IMG_2408.PNG		9/25/2023 9:17 PM	PNG File	309 KB
IMG_2409.PNG		9/25/2023 9:21 PM	PNG File	158 KB
Panzura Edge Architecture.docx	Open with Open as	7/13/2023 4:23 AM	Microsoft Word D...	1,464 KB
PanzuraEdge_LoggingUserPortal_1.0.docx		7/28/2023 1:59 AM	Microsoft Word D...	1,092 KB

Panzura Edge Desktop's dashboard shows you the progress of the files being downloaded on the Live tab. These disappear as soon as download is complete.

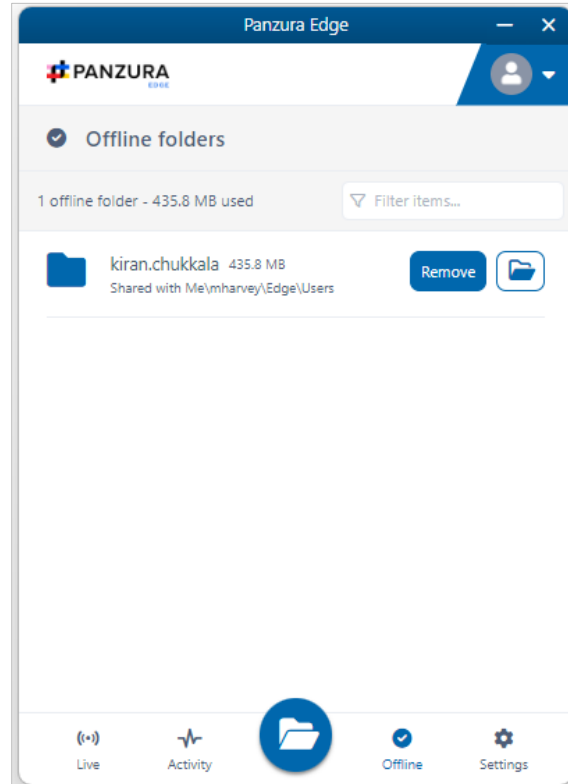


On the Activity tab, Panzura Edge Desktop shows you the download actions for the same files.

Panzura Edge Desktop App for Windows OS



The Offline tab shows you folders that you have stored offline:

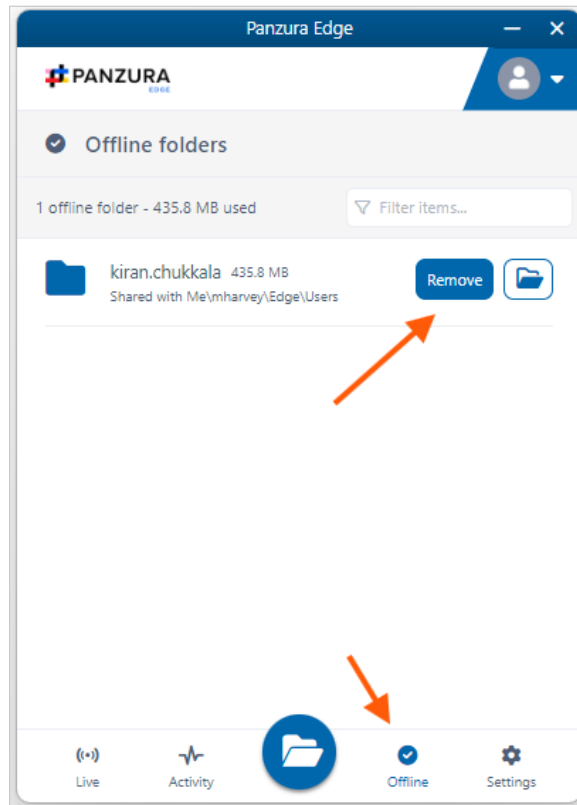


Remove Files and Folders from Offline Folders for Panzura Edge Desktop for Windows

You can remove an offline folder, either through the Panzura Edge Desktop dashboard or through File Explorer.

Remove an offline folder through the Panzura Edge Desktop dashboard:

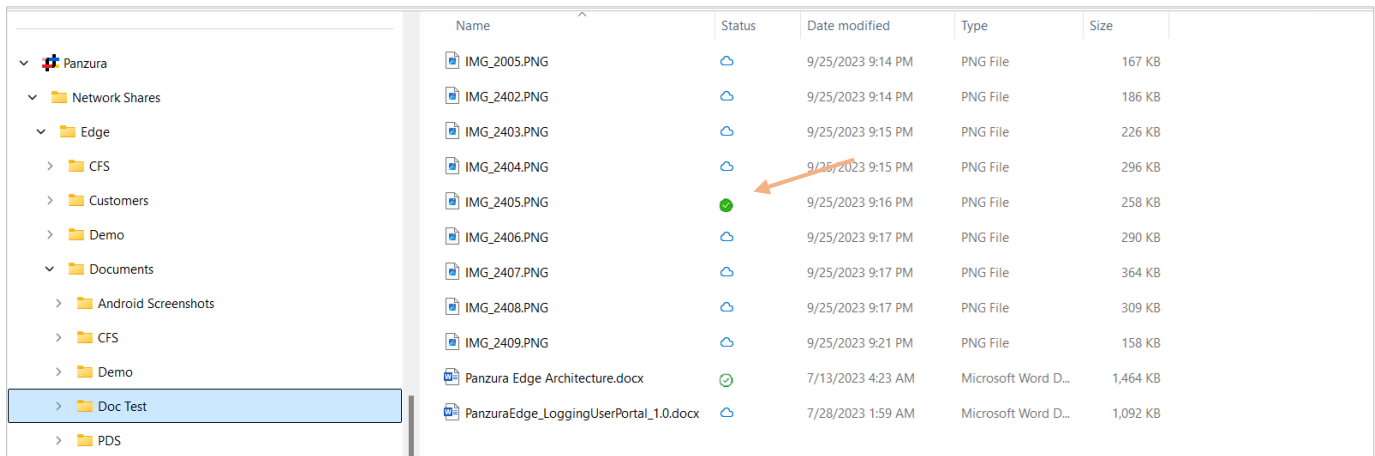
1. In the Panzura Edge Desktop dashboard, click the Offline tab.
2. Click the Remove button next to the folder that you want to remove as an offline folder.



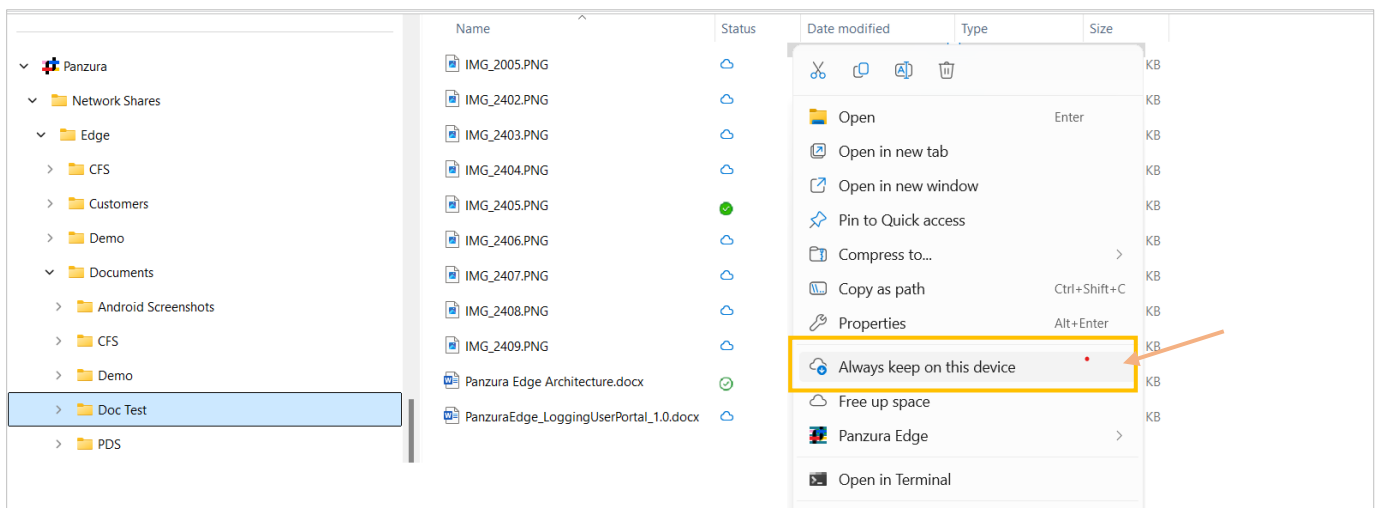
The folder is no longer an offline folder. It no longer appears on the Offline tab of the Panzura Edge Desktop dashboard and the Panzura Edge Desktop offline icon no longer appears next to it in the File Explorer.

Remove an offline file or folder through Windows explorer

3. In Windows explorer, right-click on the file (it should have a green icon next to it).

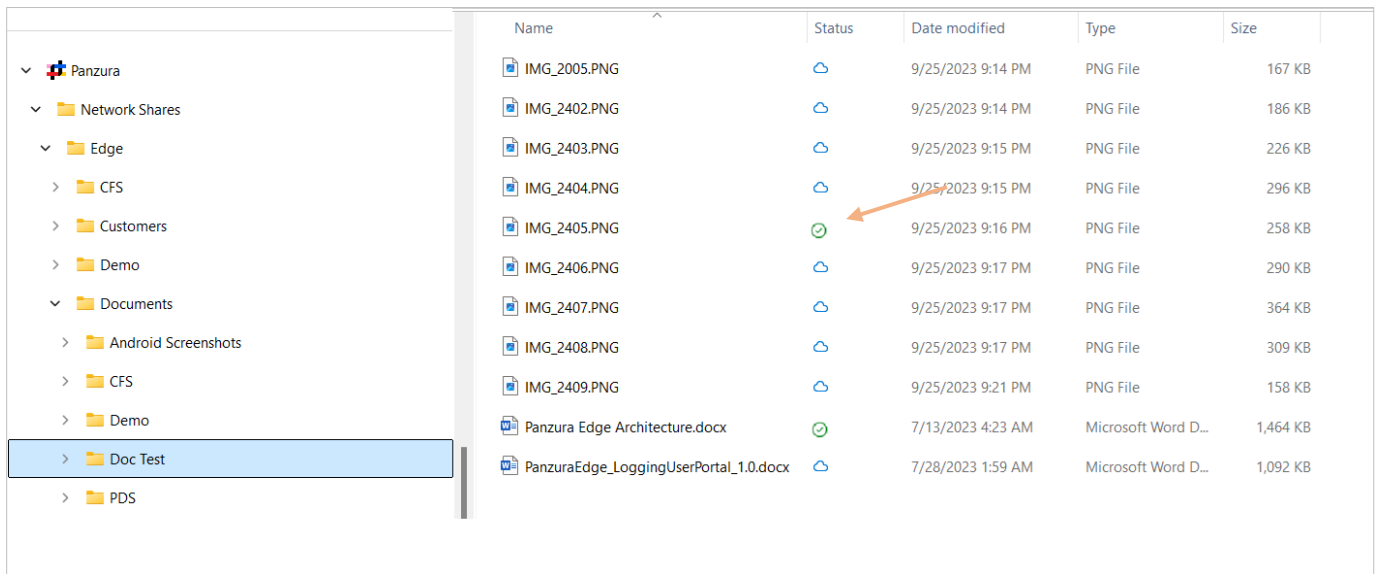


4. In the drop-down list, Always keep on this device is checked. Click it to remove the check and remove it as an offline folder.



The green circular icon is replaced with a white circular icon, which indicates that the file is still downloaded but not marked for syncing with Panzura Edge as an offline folder.

Panzura Edge Desktop App for Windows OS



Name	Status	Date modified	Type	Size
IMG_2005.PNG	Cloud icon	9/25/2023 9:14 PM	PNG File	167 KB
IMG_2402.PNG	Cloud icon	9/25/2023 9:14 PM	PNG File	186 KB
IMG_2403.PNG	Cloud icon	9/25/2023 9:15 PM	PNG File	226 KB
IMG_2404.PNG	Cloud icon	9/25/2023 9:15 PM	PNG File	296 KB
IMG_2405.PNG	White circular icon	9/25/2023 9:16 PM	PNG File	258 KB
IMG_2406.PNG	Cloud icon	9/25/2023 9:17 PM	PNG File	290 KB
IMG_2407.PNG	Cloud icon	9/25/2023 9:17 PM	PNG File	364 KB
IMG_2408.PNG	Cloud icon	9/25/2023 9:17 PM	PNG File	309 KB
IMG_2409.PNG	Cloud icon	9/25/2023 9:21 PM	PNG File	158 KB
Panzura Edge Architecture.docx	White circular icon	7/13/2023 4:23 AM	Microsoft Word D...	1,464 KB
PanzuraEdge_LoggingUserPortal_1.0.docx	Cloud icon	7/28/2023 1:59 AM	Microsoft Word D...	1,092 KB

The file is also no longer listed on the Offline tab of the Panzura Edge Desktop dashboard.

Free up local space

When a file or folder is downloaded locally, but not stored as a Panzura Edge offline file or folder for syncing with Panzura Edge, you can delete the local version to free up space.

1. In Windows, right-click on a file that is marked with a white circular icon.
2. In the drop-down list, choose Free up space.

The white circular icon is replaced with a cloud icon, which indicates that now the file is only available remotely in Panzura Edge.

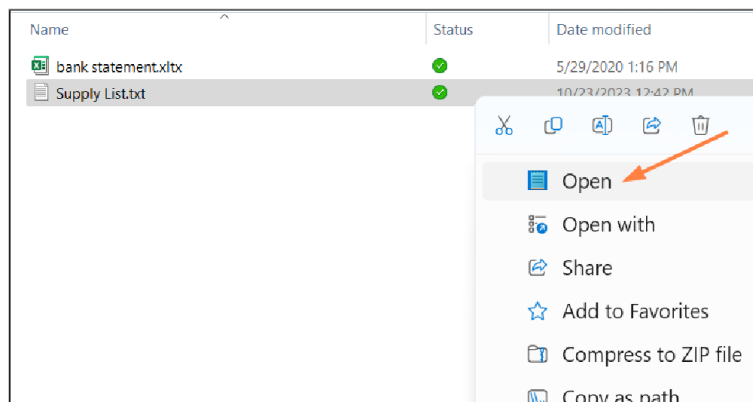
Working with Offline Files from Panzura Edge Desktop for Windows

After you [make files and folders available offline](#), you can perform any of the regular File Explorer actions on them when you are offline, and the changes are synchronized with the copies in Panzura Edge when you go back online.

For example, in the following procedure, a downloaded file is edited from file explorer while the user is offline.

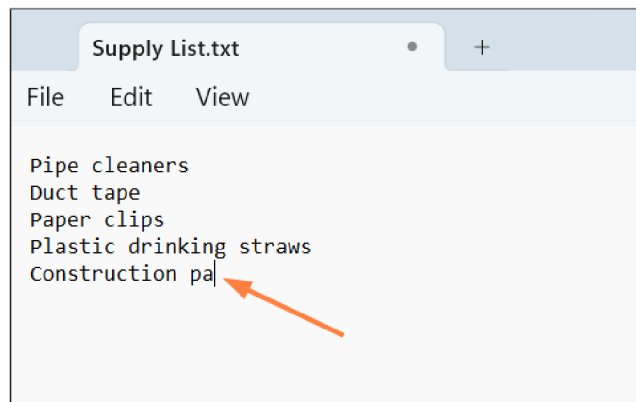
When the user goes back online, the Activities tab of Panzura Edge Desktop lists the action as a modification of the file, and the Live tab of Panzura Edge Desktop shows an upload.

1. In Windows explorer, while you are offline, right-click on an offline file (a file with a green circular icon) and choose Open or Open with.



The file opens in the default or selected application.

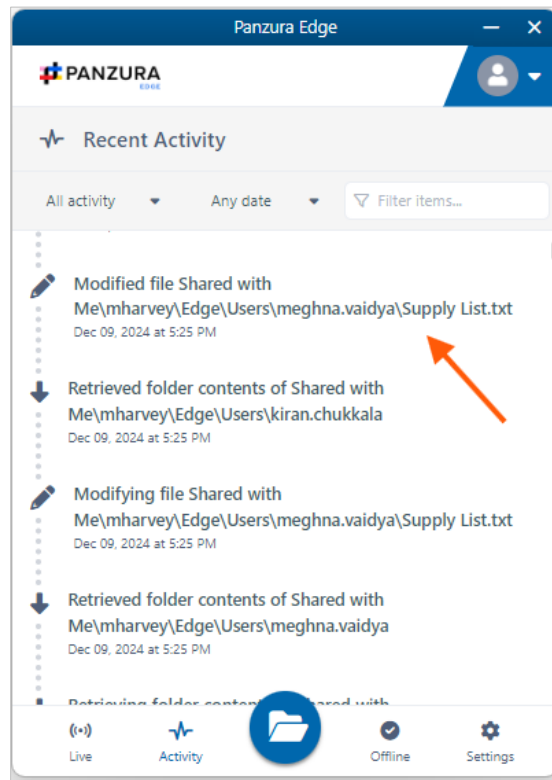
2. Make edits to the file.



3. Save your edits and close the file.
4. Go back online.

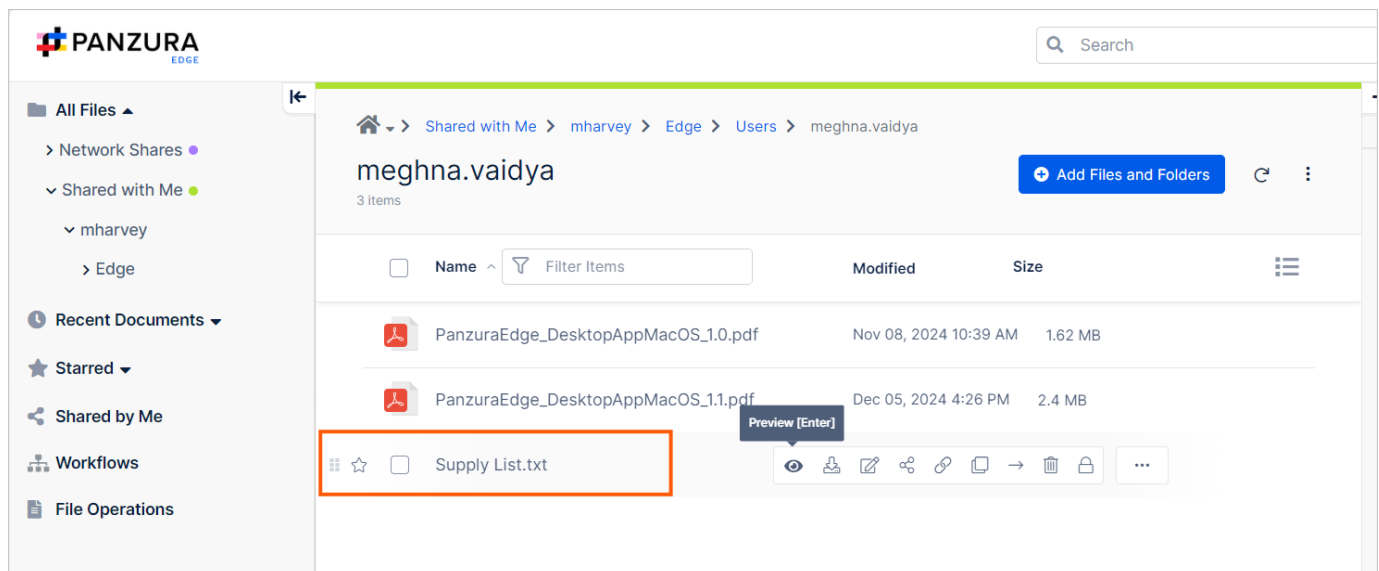
- Click the Activities tab in Panzura Edge Desktop.

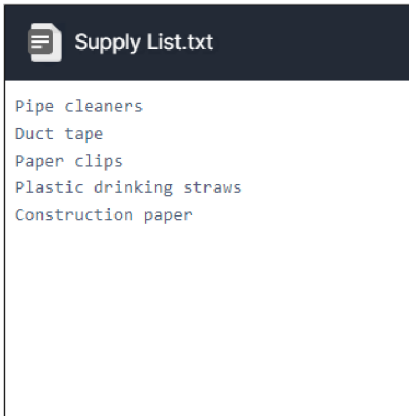
The latest activity listing indicates that the file has been modified.



In addition, the modified file is synced with Panzura Edge (uploaded to Panzura Edge) and replaces the original file in Panzura Edge, so that the edited file is now the same offline and online.

- If you want to confirm that the file has been synchronized, open or preview the file in Panzura Edge and check its contents.

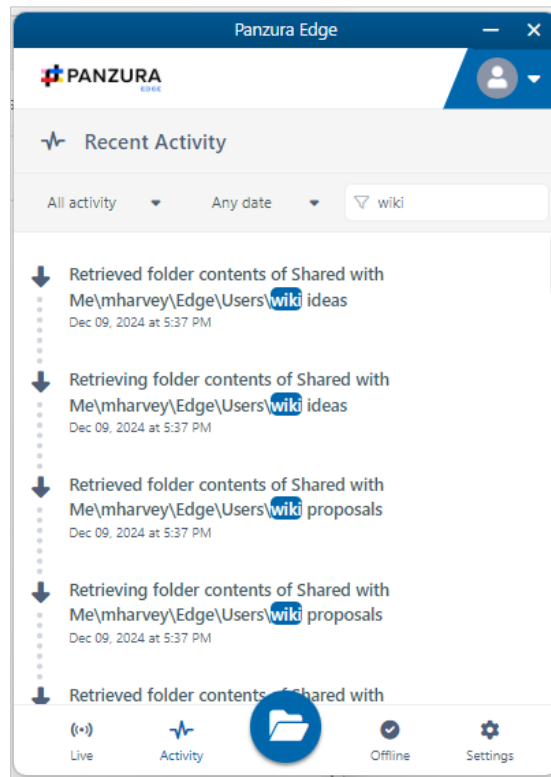




Working with Online Files in Panzura Edge Desktop for Windows

In the Panzura Edge Desktop folder in Windows explorer, any file or folder with a cloud next to it is online in Panzura Edge; when you edit or otherwise modify the file or folder from Windows explorer, you are modifying it in Panzura Edge, and the changes appear immediately in the files in the Panzura Edge user portal and other clients.

In the Activity tab of the Panzura Edge Desktop dashboard, you can see action for renaming the folder Wiki proposals to Wiki ideas:



The same is true if you edit, delete, create, or copy a file in either interface. It appears almost immediately on the other. (You can check the Activity tab to monitor when syncing has occurred.)

How Panzura Edge Desktop for Windows handles change conflicts

File conflict occurs when Panzura Edge Desktop for Windows cannot determine which copy of a file is the most recent. It can arise under the following conditions:

- When two users save the same file at approximately the same time.
- When one user is editing a file offline, and the file is modified by another user in Panzura Edge. When an offline person comes back online and Panzura Edge Desktop tries to upload the edited version to the server, it detects that there is a new version available.

In these cases, Panzura Edge Desktop for Windows automatically resolves the conflict by saving the copy of the file on the server and overwriting the local copy with it.

Using Panzura Edge for Office with Panzura Edge Desktop for Windows

- Panzura Edge for Office is an MS Office add-in for Word, Excel, and PowerPoint which can be used in both Windows and macOS with Panzura Edge Sync, Panzura Edge Drive, and Panzura Edge Desktop. It is available in Panzura Edge beginning with version 23.1.

For instructions on how to install Panzura Edge for Office, see [Using Panzura Edge for Office](#).

Before using Panzura Edge for Office with Panzura Edge Desktop for Windows

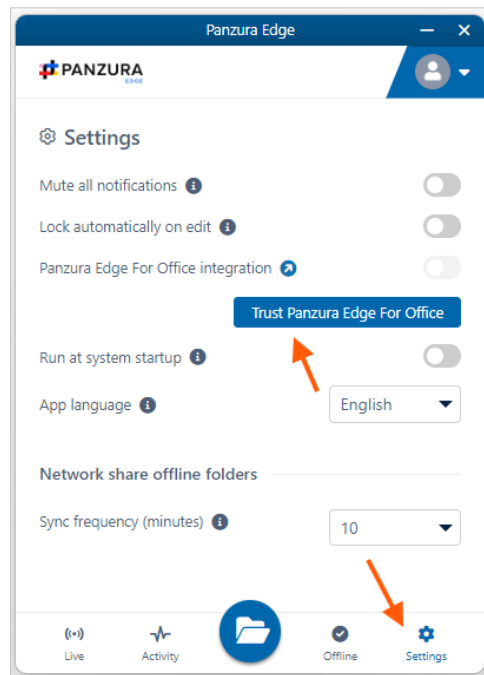
The first time you install Panzura Edge Desktop for Windows, you must:

1. In your cloudconfig.php file, set your cookie same-site value to None.
2. Confirm that you trust Panzura Edge for Office and enable it as shown in the following procedure.

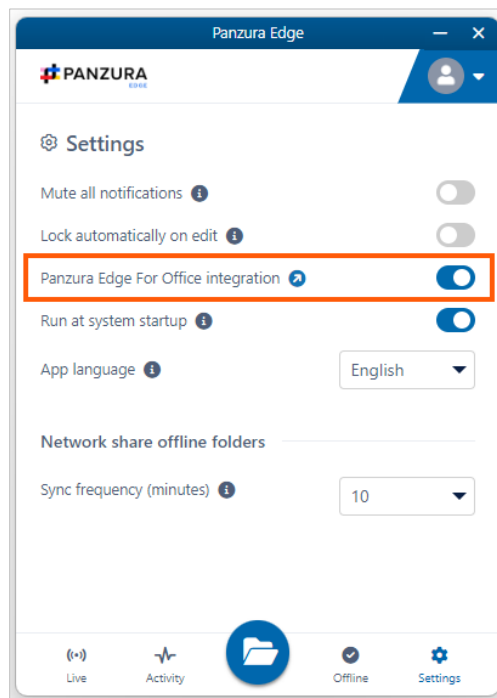
To confirm that you trust Panzura Edge for Office and enable it:

1. After you log in to Panzura Edge Desktop for Windows, click the Settings tab.

2. Then, click the Trust Panzura Edge for Office button.



The Trust Panzura Edge for Office button disappears, and the slider for Panzura Edge For Office integration becomes accessible, and is enabled by default. Leave enabled to be able to use Panzura Edge for Office.



Panzura Edge for Office is now enabled, but to use it in Office files, you must [attach the add-in](#) to each type of Office file from your Panzura Edge Desktop directory.

Working with Panzura Edge for Office in Panzura Edge Desktop for Windows

- Locking in Panzura Edge for Office, described below, does not work properly in the current beta version of Panzura Edge Desktop for Windows.

The Panzura Edge for Office task panel displays information about a file and enables you to:

- Lock or unlock a file.
- Prevent or allow download of a file while locked.
- Share a file.
- Manage file versions, and view file details and metadata.

Lock or unlock a file

You can use the file locking function in Panzura Edge for Office to:

- See if you have a file locked for editing
- Turn a file lock on or off
- Prevent or enable downloads of a locked file

If a shared file is not locked when you open it for edit, another user can also open the file and make changes. To avoid this, by default, Panzura Edge for Office automatically locks files for editing when they are opened.

When you open an Office file in your client directory, the Panzura Edge for Office panel shows File is locked, and by default, users are allowed to download or read the file (Prevent download is disabled).

Panzura Edge Desktop App for Windows OS

The screenshot displays the Panzura Edge Desktop App interface for Windows OS. The main window shows a spreadsheet titled "Arbitrage Financial" with columns for Item #, Description, Qty, Unit Price, Discount, and Price. The spreadsheet contains data for 12 items, including "Invoice 3-456-2 Data 1" through "Data 12". The sidebar on the right, titled "Panzura For Office", shows the file "Sales invoice tracker.xlsx" located at "/Network Shares/My Home Folder". The sidebar includes controls for file locking, preventing download, and sharing, as well as sections for Versions and Comments.

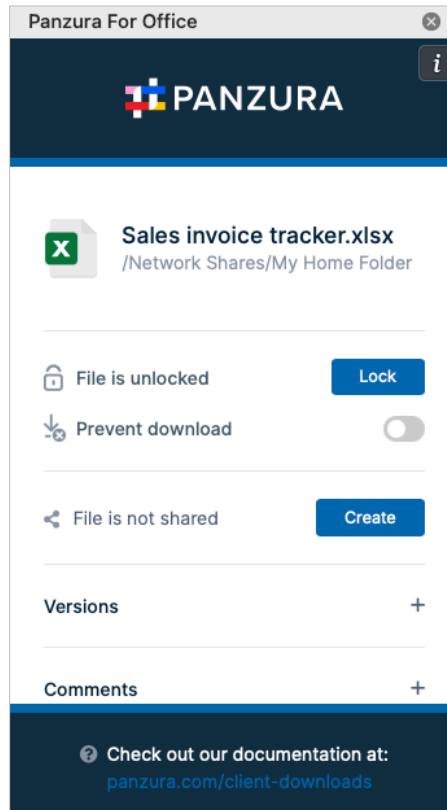
Item #	Description	Qty	Unit Price	Discount	Price
Z4567	Invoice 3-456-2 Data 1	39	\$ 5.00	\$ -	195.00
Z4570	Invoice 3-456-2 Data 4	40	7.00	-	280.00
Z4571	Invoice 3-456-2 Data 5	10	4.00	-	40.00
Z4572	Invoice 3-456-2 Data 6	5	8.00	-	40.00
Z4573	Invoice 3-456-2 Data 7	70	6.00	-	420.00
Z4574	Invoice 3-456-2 Data 8	25	4.00	-	100.00
Z4575	Invoice 3-456-2 Data 9	5	7.00	3.00	32.00
Z4576	Invoice 3-456-2 Data 10	80	1.00	-	80.00
Z4577	Invoice 3-456-2 Data 11	65	7.00	-	455.00
Z4578	Invoice 3-456-2 Data 12	44	1.00	-	44.00

- To prevent other users from downloading or reading the file while it is locked, click the Prevent download slider.

This screenshot shows the "Panzura For Office" sidebar for the file "Panzura Edge.docx" located at "/Network Shares/My Home Folder". The sidebar includes controls for file locking, preventing download, and sharing. It also displays the date and time of the last modification (Mar 05, 2024, 2:13 PM) and a message indicating that the file has been shared privately. The sidebar includes sections for Versions and Comments.

4. To unlock the file while you have it opened for edit, click Unlock. Now other users can modify as well as view and download the file.

Note: Prevent download cannot be enabled when the file is unlocked.

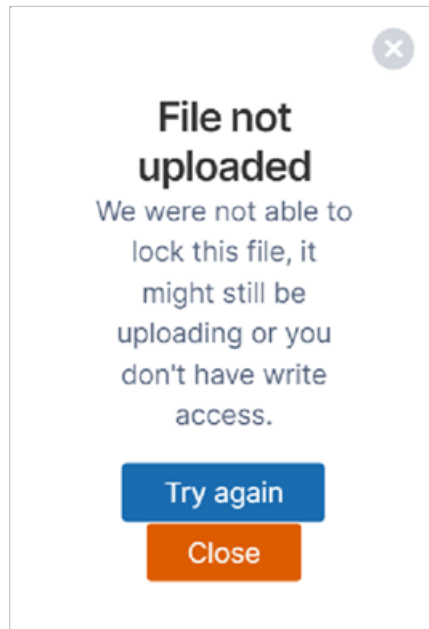


The following table describes what each lock status means and how it impacts what you and others you have shared the file with can do with the file.

Lock Status	Access by lock owner	Access by others
File is locked (download allowed)	Read and modification allowed	Only read is allowed, no modification is allowed
File is locked (download prevented)	Read and modification allowed	Neither read nor modification is allowed
File is not locked	Read and modification allowed	Read and modification allowed

For a locked file with download (read) prevented:

1. If USER1 has locked (and read blocked) the file:
2. The Panzura Edge client will not download the file for USER2
3. However, if USER2 has already downloaded the file in Sync or Drive, then:
4. Panzura Edge Sync will allow Panzura Edge for Office to open the file.
5. Panzura Edge Drive will not allow the file to be opened by USER2, unless Drive has already cached the file.
6. If an admin prevents file locking after a user has locked a file in a client:
7. The lock is automatically removed from the file
8. Additional files cannot be locked using Panzura Edge for Office, and when you attempt to lock a file, an error message similar to the following appears:



If you are an admin and want to disable locking, see [Managing User Locks](#).

You can use the following table to understand the status of lock:

Action	Doc IQ Lock Enabled	Prevent Download	Lock Status Before Open	Lock Status After Open	Lock Status After close
An unlocked file is opened by USER1			File is not locked	File is locked (readAllowed) by USER1	File is not locked
An unlocked file is opened by USER1			File is not locked	File is not locked	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (ReadAllowed) by USER1	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Allowed) by User 1	File is Locked (ReadAllowed) by USER1	File is not locked
A file locked by USER1 is opened by USER1			File is Locked (Read Blocked) by USER1	File is Locked (ReadBlocked) by USER1	File is not locked
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (ReadAllowed) by USER1	File is Locked (ReadAllowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Allowed) by USER1	File is Locked (ReadAllowed) by USER1	File is Locked (ReadAllowed) by USER1
A file locked by USER1 is opened by USER2			File is Locked (Read Blocked) by USER1	File is Locked (ReadBlocked) by USER1	File is Locked (ReadBlocked) by USER1

Share a file

To share a file or folder that is opened with Panzura Edge for Office:

1. In the Panzura Edge for Office panel, click Create.

The screenshot shows the Panzura Edge Desktop App interface. The main window displays an Excel spreadsheet titled "Arbitrage Financial". The spreadsheet contains an invoice for Project 2, including contact information for Arbitrage Financial and Contoso, Ltd., and a table of invoice items.

The Panzura For Office sidebar is visible on the right, showing the file "Sales invoice tracker.xlsx" located at /Network Shares/My Home Folder. The sidebar includes controls for file locking, preventing download, and sharing. The "File is not shared" status is displayed, and the "Create" button is highlighted.

Invoice for Project 2

Arbitrage Financial

Address: 456 East 78th Ave
Denver, CO 12345

Phone: 321-654-0987
Fax: 321-654-7890

Email: arbitrage@interestingsite.com
Website: interestingsite.com

Bill To: Contoso, Ltd.
567 Walnut Ln.
Moline, MO 098765

Phone: 432-555-0189
Fax: 432-555-0123
Email: contoso@interestingsite.com

Invoice #: 3-456-2
Invoice Date: 12/12/24

Item #	Description	Qty	Unit Price	Discount	Price
Z4567	Invoice 3-456-2 Data 1	39	\$ 5.00	\$ -	195.00
Z4570	Invoice 3-456-2 Data 4	40	7.00	-	280.00
Z4571	Invoice 3-456-2 Data 5	10	4.00	-	40.00
Z4572	Invoice 3-456-2 Data 6	5	8.00	-	40.00
Z4573	Invoice 3-456-2 Data 7	70	6.00	-	420.00
Z4574	Invoice 3-456-2 Data 8	25	4.00	-	100.00
Z4575	Invoice 3-456-2 Data 9	5	7.00	3.00	32.00
Z4576	Invoice 3-456-2 Data 10	80	1.00	-	80.00
Z4577	Invoice 3-456-2 Data 11	65	7.00	-	455.00
Z4578	Invoice 3-456-2 Data 12	44	1.00	-	44.00

Panzura For Office

Sales invoice tracker.xlsx
/Network Shares/My Home Folder

File is locked **Unlock**

Prevent download ☐

File is not shared **Create**





Versions +

Comments +

Check out our documentation at:
panzura.com/client-downloads

A Share Link screen that is nearly identical to the one in the user portal opens:

Share link for file Sales invoice tracker.xlsx

Share Link
<https://demo-edge.panzura.com/url/dugivx7txnqppqnz> [Modify Link](#)    

Shared File
 /EXTERNAL/My Home Folder/Sales invoice tracker.xlsx

Share Options | **Share History**

Share Name: cvYxvL62loaKRmBD [Change](#)

Expires: Dec 09, 2024 8:04 AM

Max number of downloads: No Restrictions

Send Email Notifications: Yes

Sharing Permissions:


☐ Allow anyone with link

☒ Allow anyone with link and a password

☐ Allow selected users or groups

☐ Allow anyone with Secure Web Viewer link and a password

This share is **password protected public share**. Only users with the share link and password can view.

Allow View + Download ***** 

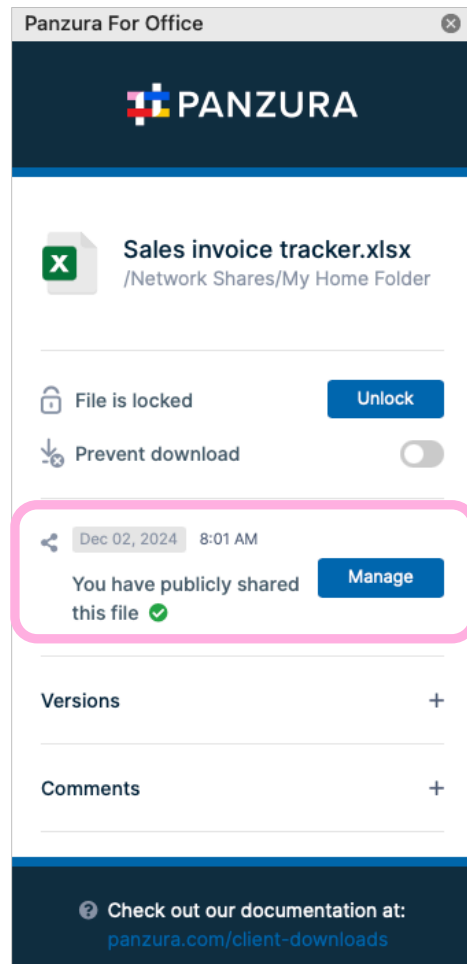
[Share](#) [Save](#)

[Remove Share](#) [OK](#)

2. Share the file using the same settings and options that you would for a share in the user portal. See [Sharing Files and Folders](#) for help.

Note: The option for downloading the share QR code, which is available for shares created from the user portal, is not available for shares created in Panzura Edge for Office.

After you have shared the file, the Panzura Edge for Office panel displays details of the share:



3. Click Manage to change the options or permissions in the share.

Panzura Edge for Office log locations

The locations of log files for Panzura Edge for Office in Windows and macOS are the following:

- Windows: %appdata%/FFOServer
- macOS: /Users/[USERNAME]/Library/Preferences/FFOServer

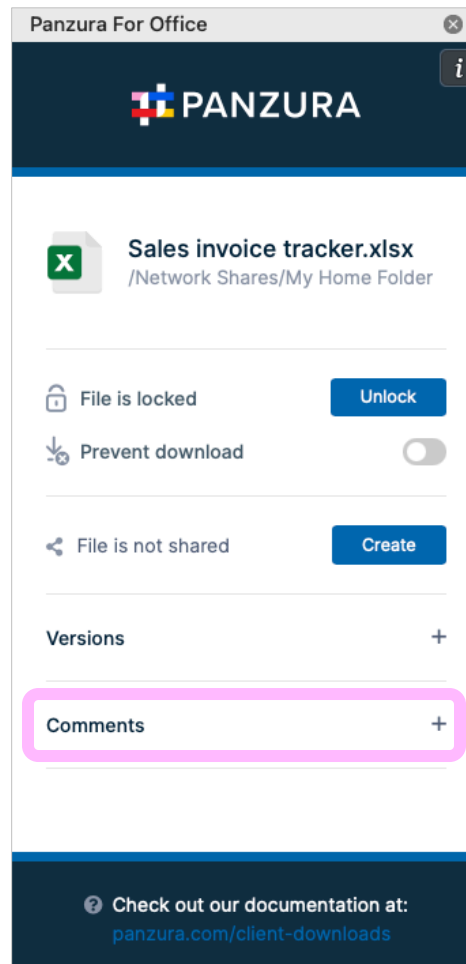
View and add comments

Comments added to files and folders in Panzura Edge for Office also appear in the user portal and any of the other client apps.

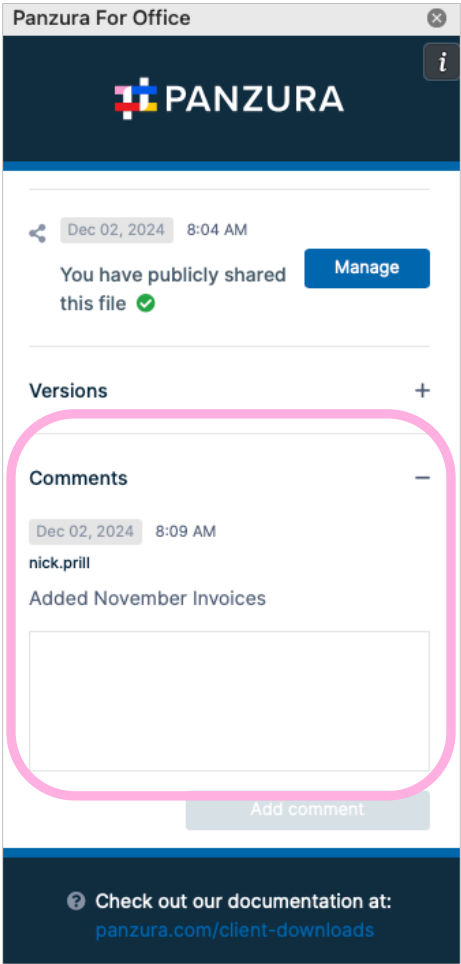
To view and add comments in Panzura Edge for Office:

1. If Comments is not visible in the Panzura Edge for Office panel, scroll down to the bottom of the panel.

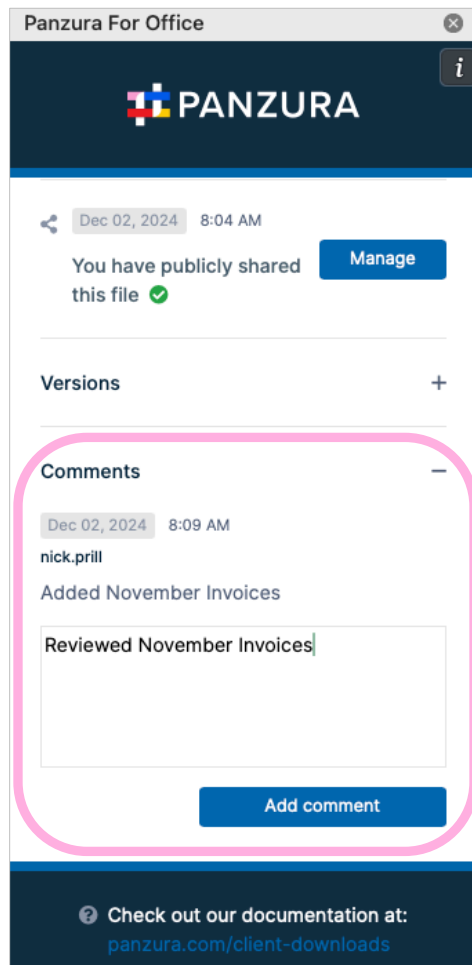
2. Click the + across from Comments.



Any existing comments added to the file or folder here or anywhere else in Panzura Edge appear above the Comments box.



3. To add a new comment, click inside the Comments box and enter the comment.



4. Click Add comment. The comment is added.

Panzura for Office FAQs

What applications does Panzura for Office work with?

- Word
- Excel
- PowerPoint

What does Panzura for Office do?

Panzura for Office works with Office documents to enable you to:

- Automatically lock and unlock files when they are opened and closed
- Share files
- Access different versions of files