New Organization Planning Worksheet

Use this worksheet to help plan your Anchor organization settings and configuration options.

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| Organization Structure | |
| Will this organization be its own, independent entity? Or do you need to create a parent organization with a set of suborganizations?  For example, you might create a parent organization that acts as a container for a group of suborganizations. These suborganizations might be departments, branches, or satellite offices of a larger client site. |  |

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| Data | |
| How much data does this organization need? Consider that Team Shares, backups, file revisions, and deleted data (not purged) all count towards your data quota. |  |
| How long do you want to store deleted files? | * Indefinitely * Automatically purge after\_\_\_\_\_ days * Manually purge when necessary |
| How long do you want to store deleted revisions (file versions)? | * Indefinitely * Automatically purge after\_\_\_\_\_ days * Manually purge when necessary |
| Within backups, how long do you want to store deleted files? | * Indefinitely * Automatically purge after\_\_\_\_\_ days * Manually purge when necessary |
| Within backups, how long do you want to store revisions (file versions)? | * Indefinitely * Automatically purge after\_\_\_\_\_ days * Manually purge when necessary |
| Do you need to import data from an existing File Server? If so, do you want to completely migrate this data, or do you want to maintain a connection between the server and the Anchor cloud? | * No file server * Migrate data from a File Server * Maintain a connection between a File Server and the Cloud |

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| Policies | |
| Which features do you want to enable? | * Service Plans (learn more in Course 4) * Branding * WebDAV support * Backup creation * File Server Enablement * PSA integration * Authentication (LDAP) integration, like Active Directory * Web Preview * Web Editing |
| Which permissions do you want to enable for administrators assigned to this organization? | * Let organization admins browse user files (required for administrators to view and restore end user files) * Let organization admins browse remote files (required when setting up File Server Enablement) * Let organization admins create users |
| Which permissions do you want to enable for standard users assigned to this organization? | * Allow users to create their own backups * Allow users to share files |
| Do you want to force all share links to require a login (only allow secure share links)? |  |

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| Settings | |
| Which tools do you want to integrate with? | * An email server for sending outbound emails * ConnectWise or Autotask PSA tools * An LDAP source (like Active Directory) |
| Do you want to brand the organization according to the client’s branding standards, or do you prefer to use your own logo and other branding resources? | * Use my own company colors, logo, etc. * Brand each organization according to their own unique preferences * No branding |

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| Onboarding | |
| Will you be importing users from an LDAP source or will you manually create user accounts? | * Import users from an LDAP source * Manually create users, one-by-one * Bulk-import users using a CSV file |
| Do you want to send new users a Welcome Email immediately when a new account is created? Or do you want to set a specific rollout date and invite users at the same time? | * Invite users immediately * Invites users in bulk on a specific date |
| Would you like to define groups for easy user management? For example, you can create a group for the Sales department and give this group quick access to the same set of Team Shares. |  |

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| Team Shares | |
| Will users need access to collaborative work folders—called Team Shares—where they can work on the same files and folders?  For example, you might create a Team Share for each department or project teams. |  |
| Where do you want each Team Share to sync? For each Team Share, you can select from:   * Web and Mobile * WebDAV * Local Machine (desktop client)   For example, if a Team Share contains only archived files, you might decide to make this data available in the web only, so that these resources don’t take up unnecessary resources on local machines.  **Note**: Users can also use the Selective Sync feature to turn off syncing to the desktop client. |  |
| Which subscribers do you want to add to these Team Shares? Will all subscribers belong to the same organization, or do you need to create a cross-organization Team Share? |  |

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| Privacy Settings | |
| Does the client of this organization require additional privacy settings? You can optionally turn on the Privacy Mode feature, which disables your ability to view data in personal folders, Team Shares, and backups.  Or, if only a few users require this kind of privacy, you can create a suborganization for these users and turn on Privacy Mode at this suborganization level. | * Turn on Privacy Mode * Do not turn on Privacy Mode |