

New Organization Planning Worksheet

Use this worksheet to help plan your x360Sync organization settings and configuration options.

Organization Structure	
<p>Will this organization be its own, independent entity? Or do you need to create a parent organization with a set of suborganizations?</p> <p>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.</p>	

Data	
<p>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.</p>	
<p>How long do you want to store deleted files?</p>	<input type="checkbox"/> Indefinitely <input type="checkbox"/> Automatically purge after _____ days <input type="checkbox"/> Manually purge when necessary
<p>How long do you want to store deleted revisions (file versions)?</p>	<input type="checkbox"/> Indefinitely <input type="checkbox"/> Automatically purge after _____ days <input type="checkbox"/> Manually purge when necessary
<p>Within backups, how long do you want to store deleted files?</p>	<input type="checkbox"/> Indefinitely <input type="checkbox"/> Automatically purge after _____ days <input type="checkbox"/> Manually purge when necessary
<p>Within backups, how long do you want to store revisions (file versions)?</p>	<input type="checkbox"/> Indefinitely <input type="checkbox"/> Automatically purge after _____ days <input type="checkbox"/> Manually purge when necessary
<p>Do you need to import data from an existing File Server? If so, do you want to completely</p>	<input type="checkbox"/> No file server <input type="checkbox"/> Migrate data from a File Server

migrate this data, or do you want to maintain a connection between the server and the X360Sync cloud?	<input type="checkbox"/> Maintain a connection between a File Server and the Cloud
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Policies	
Which features do you want to enable?	<input type="checkbox"/> Service Plans (learn more in Course 4) <input type="checkbox"/> Branding <input type="checkbox"/> WebDAV support <input type="checkbox"/> Backup creation <input type="checkbox"/> File Server Enablement <input type="checkbox"/> PSA integration <input type="checkbox"/> Authentication (LDAP) integration, like Active Directory <input type="checkbox"/> Web Preview <input type="checkbox"/> Web Editing
Which permissions do you want to enable for administrators assigned to this organization?	<input type="checkbox"/> Let organization admins browse user files (required for administrators to view and restore end user files) <input type="checkbox"/> Let organization admins browse remote files (required when setting up File Server Enablement) <input type="checkbox"/> Let organization admins create users
Which permissions do you want to enable for standard users assigned to this organization?	<input type="checkbox"/> Allow users to create their own backups <input type="checkbox"/> Allow users to share files
Do you want to force all share links to require a login (only allow secure share links)?	

Settings	
Which tools do you want to integrate with?	<input type="checkbox"/> An email server for sending outbound emails <input type="checkbox"/> ConnectWise or Autotask PSA tools <input type="checkbox"/> 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?	<input type="checkbox"/> Use my own company colors, logo, etc. <input type="checkbox"/> Brand each organization according to their own unique preferences <input type="checkbox"/> No branding

Onboarding	
Will you be importing users from an LDAP source or will you manually create user accounts?	<input type="checkbox"/> Import users from an LDAP source <input type="checkbox"/> Manually create users, one-by-one <input type="checkbox"/> 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?	<input type="checkbox"/> Invite users immediately <input type="checkbox"/> 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.	

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: <ul style="list-style-type: none"> • 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.	

<p>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?</p>	
<p>Do you want to consider specific permission roles for each subscriber in the Team Share?</p>	<ul style="list-style-type: none"><input type="checkbox"/> Co-Owners<input type="checkbox"/> Collaborators<input type="checkbox"/> Editors<input type="checkbox"/> Web Editors<input type="checkbox"/> Viewers<input type="checkbox"/> Previewers<input type="checkbox"/> Uploaders

Privacy Settings	
<p>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.</p> <p>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.</p>	<ul style="list-style-type: none"><input type="checkbox"/> Turn on Privacy Mode<input type="checkbox"/> Do not turn on Privacy Mode