



Panzura Edge: Desktop App for MacOS

Version 1.1—December 4rd, 2024

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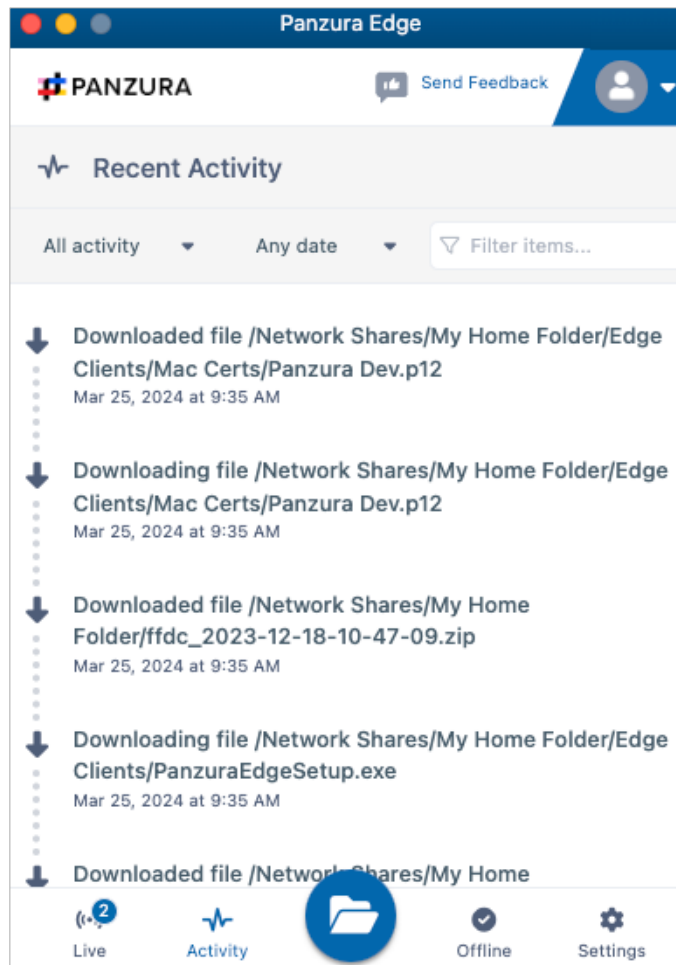
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Panzura Edge App for MacOS

This article provides information on Panzura's Edge App for MacOS.

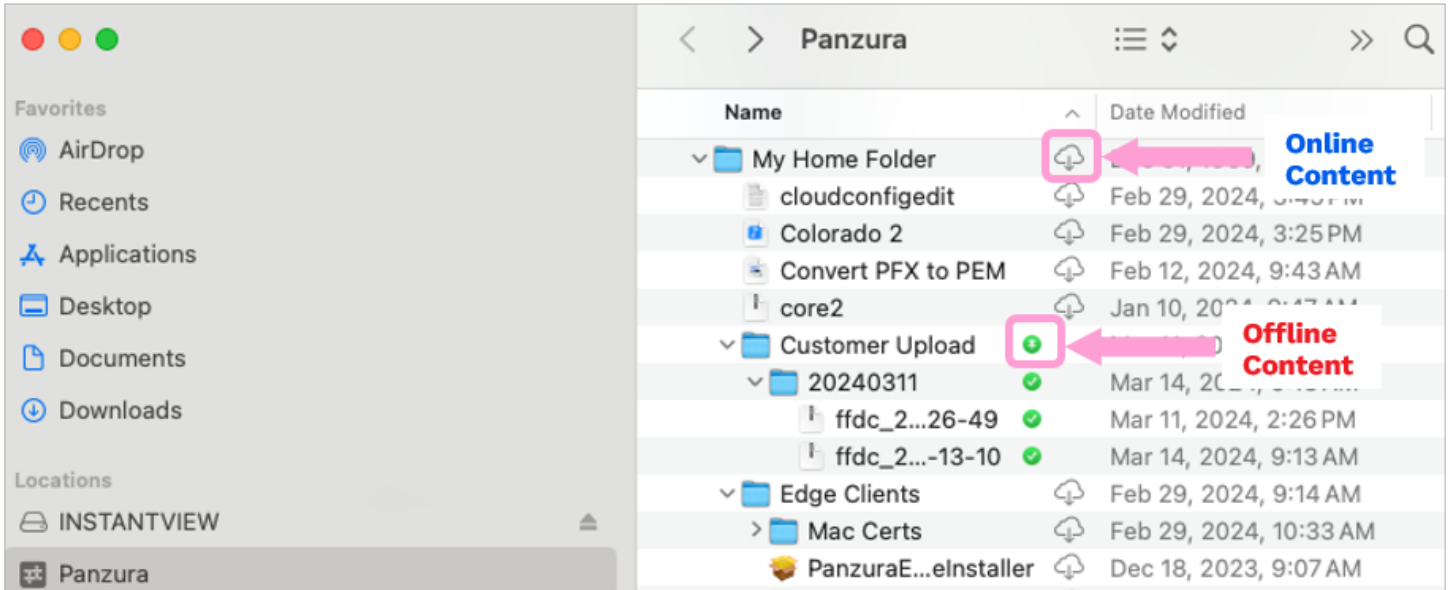
Panzura Edge for macOS enables you to access your Panzura Edge files and folders in Mac's Finder, where you can work with them online or make them available offline. Changes you make to offline files stored in Panzura Edge are immediately synced to the copies in Panzura Edge.

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



When you open Panzura Edge, its Panzura Edge folder becomes available in your Finder. 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 that the modifications there. Your downloaded folders and their files are marked with green icons with check marks. When you work with them, you are working with downloaded copies of the files, but your changes are immediately synchronized to Panzura Edge.



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

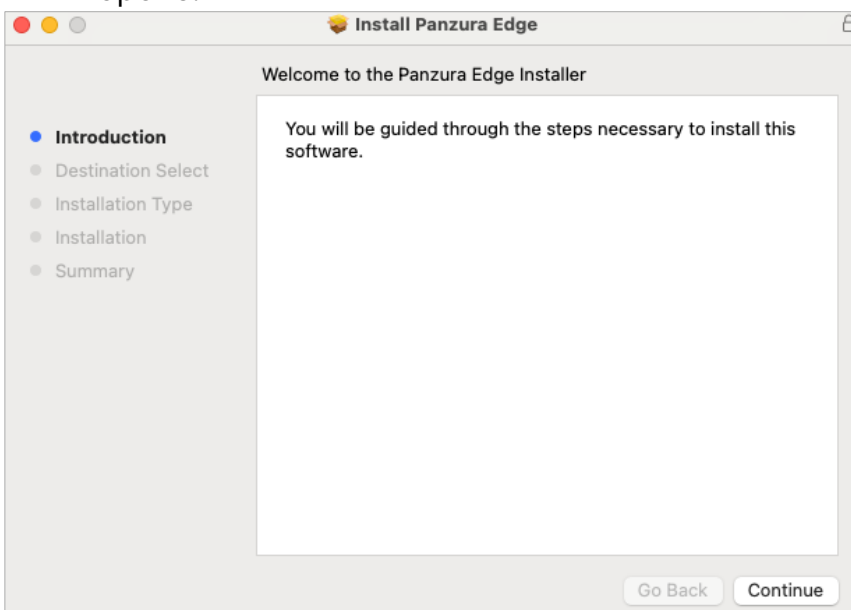
Installing Panzura Edge for MacOS

Panzura Edge is supported on macOS Monterey 12.5.1 and higher.

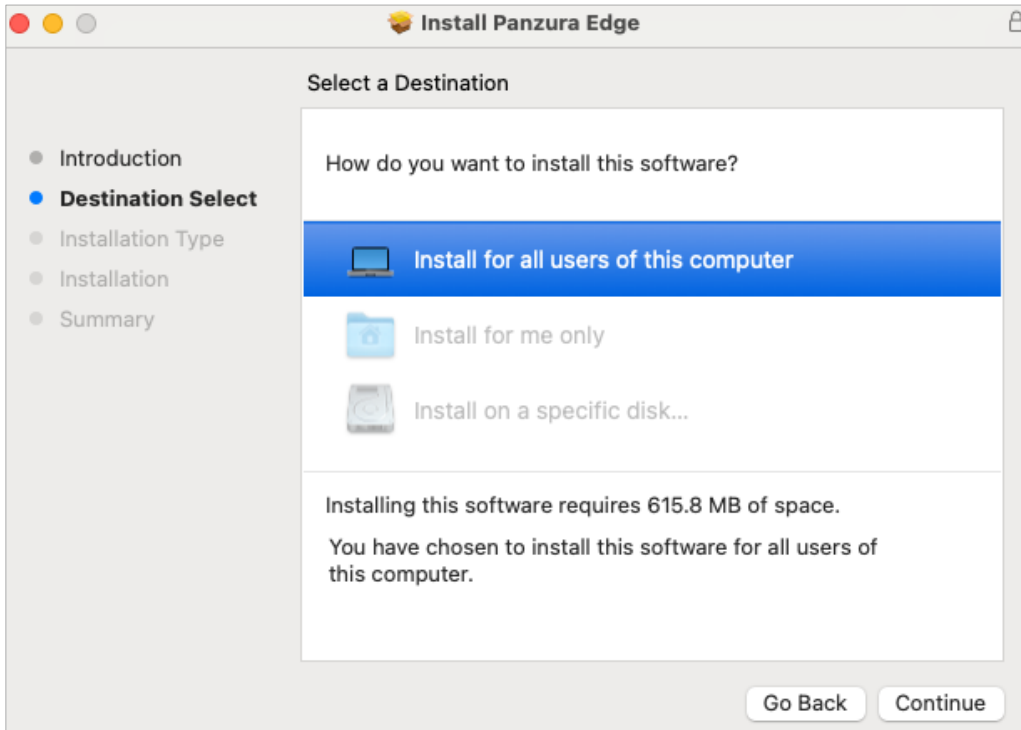
You must have Panzura Edge 23.1 or higher installed in order to use Panzura Edge for macOS.

To install Panzura Edge Desktop on macOS:

1. Install or upgrade to the latest Panzura Edge version if you do not have Panzura Edge 23.1 already installed.
2. Download Panzura Edge for macOS at <https://panzura.com/products/edge/client-downloads/> . Then, run **Panzura EdgeInstaller.pkg**. The installer's welcome screen opens:

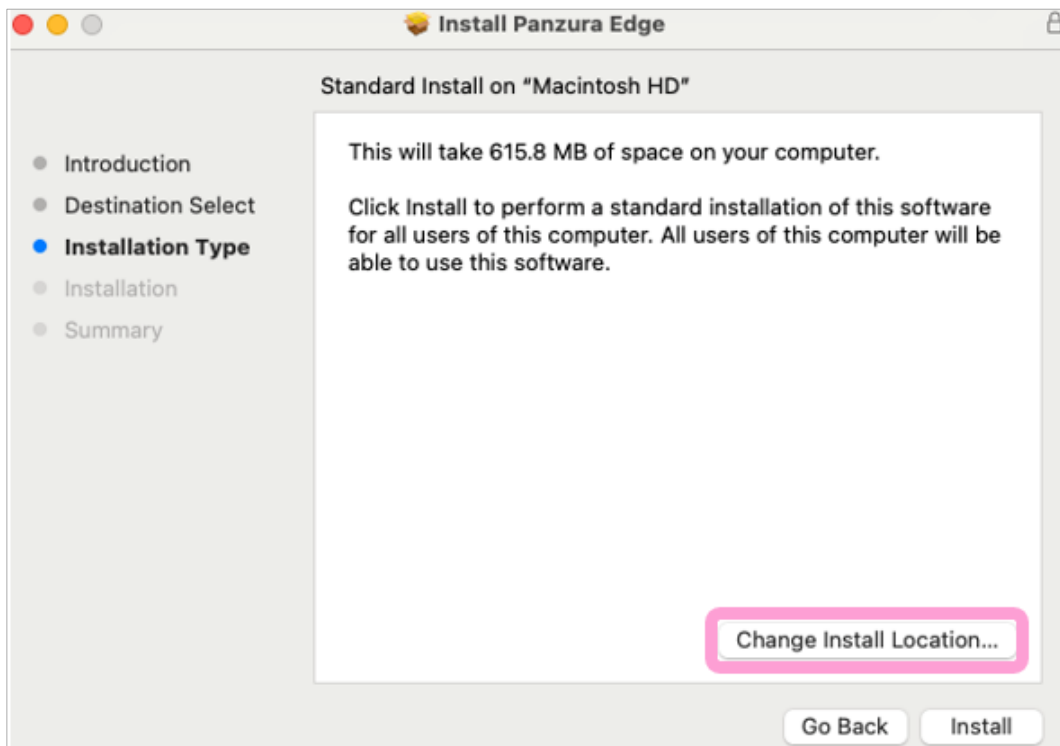


3. Click on the **Continue** button. Then, the **Select a Destination** screen opens.



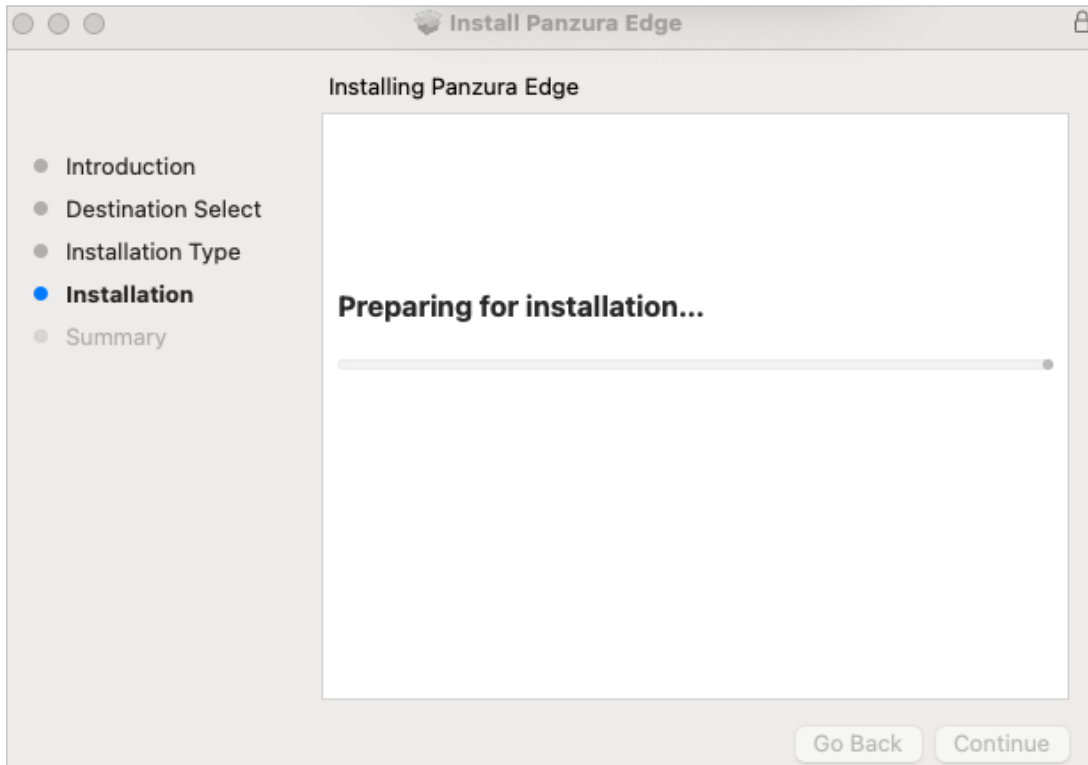
4. You can choose **Install for all users of this computer** or select a different option, then click **Continue**. The **Installation Type** screen opens.

5. By default, Panzura Edge is installed in your Apps folder. To install it in another location click **Change Install Location**.

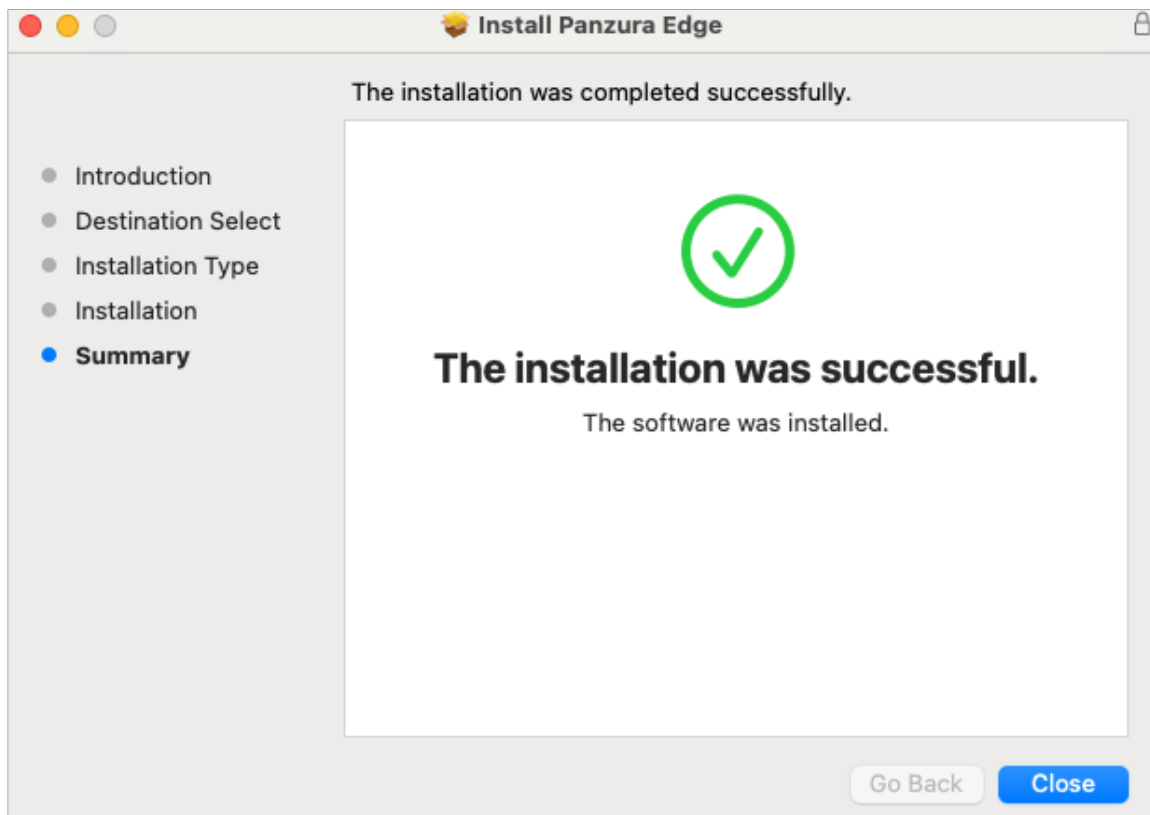


6. Click **Install**. During the installation, follow any prompts to allow processing to complete.

Panzura Edge Desktop App for MacOS



When installation is complete, the following message appears:



7. Click the **Close** button.
8. In most cases, it is a good idea to choose **Move to Trash**.
When installation is complete, the Panzura Edge login page opens.

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

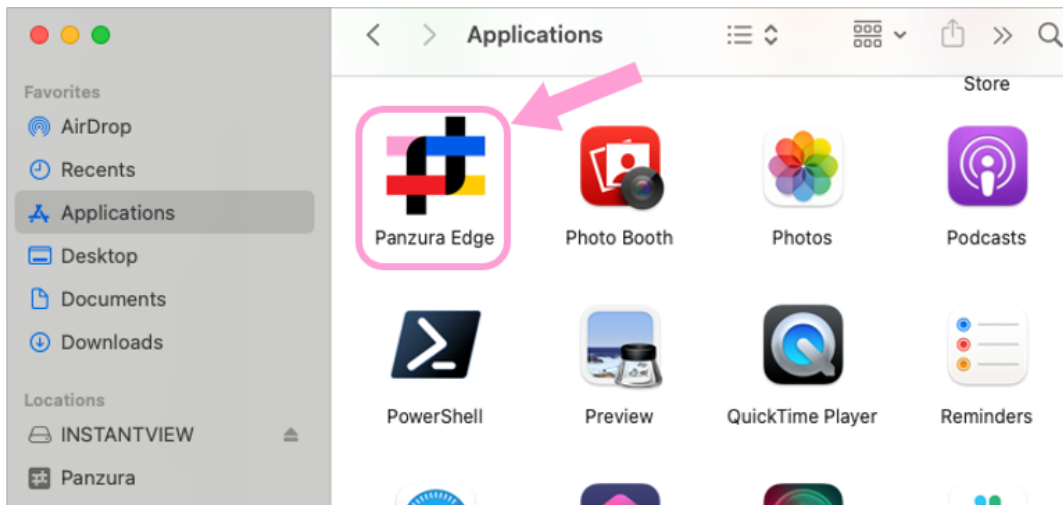
[Proxy settings](#)

9. If you do not want Panzura Edge to open automatically when you log in, you can change the setting after you log into the application. If you do not want related software running in the background, change it in your System Settings in **General > Login Items**.

Opening and Logging in to Panzura Edge in macOS

The login page for Panzura Edge opens after you install it. It opens automatically by default when you start up your computer. If you do not want it open automatically on startup, you can change the setting in Panzura Edge.

To open Panzura Edge login screen from macOS Finder, double-click the icon in the **Applications** folder.



Log in with Password

If you want to log in with a password, follow the next steps:

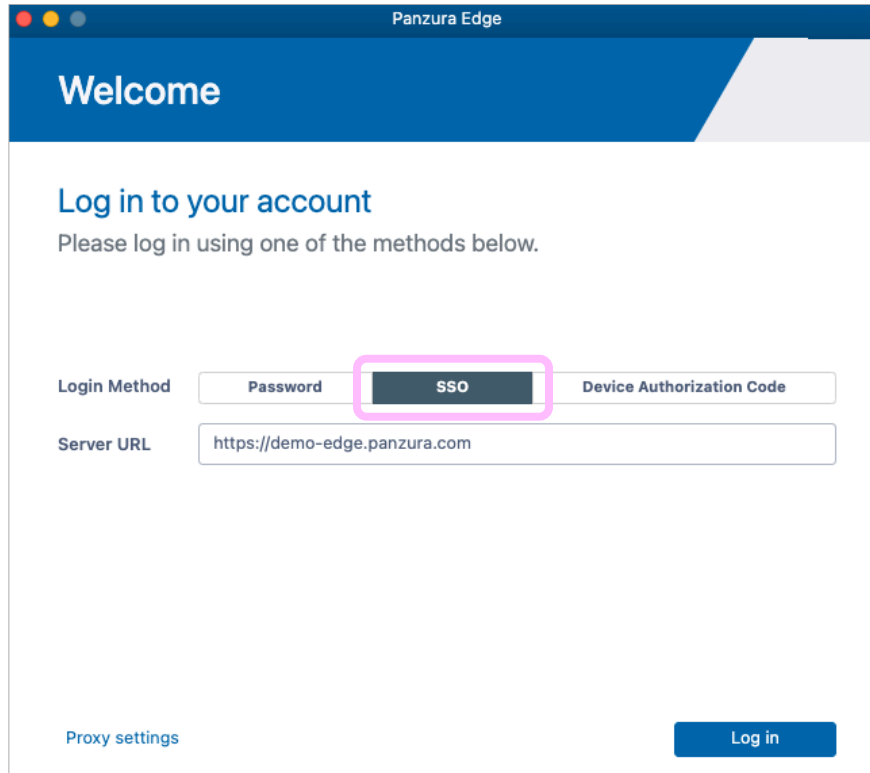
1. For **Login Method**, select the **Password** option.
2. Enter your server URL, account name (username), and password into the log in screen. This information will be provided by your IT team.
3. Click the **Log in** button.

A screenshot of the Panzura Edge login interface. The window title is "Panzura Edge". The header is blue with the word "Welcome" in white. Below the header, it says "Log in to your account" and "Please log in using one of the methods below." There are three buttons for "Login Method": "Password" (which is selected and highlighted with a pink box), "SSO", and "Device Authorization Code". Below these are input fields for "Server URL" (https://demo-edge.panzura.com), "Account Name" (test.user), and "Password" (masked with dots). At the bottom left is a link for "Proxy settings" and at the bottom right is a blue "Log in" button.

Log in with Single-Sign On (SSO)

If you want to log in with Single-Sign On (SSO), follow the next steps:

1. For **Login Method**, select **SSO** option.
2. Type the address to the Panzura Edge server that was provided to you when your account was created.



Panzura Edge

Welcome

Log in to your account

Please log in using one of the methods below.

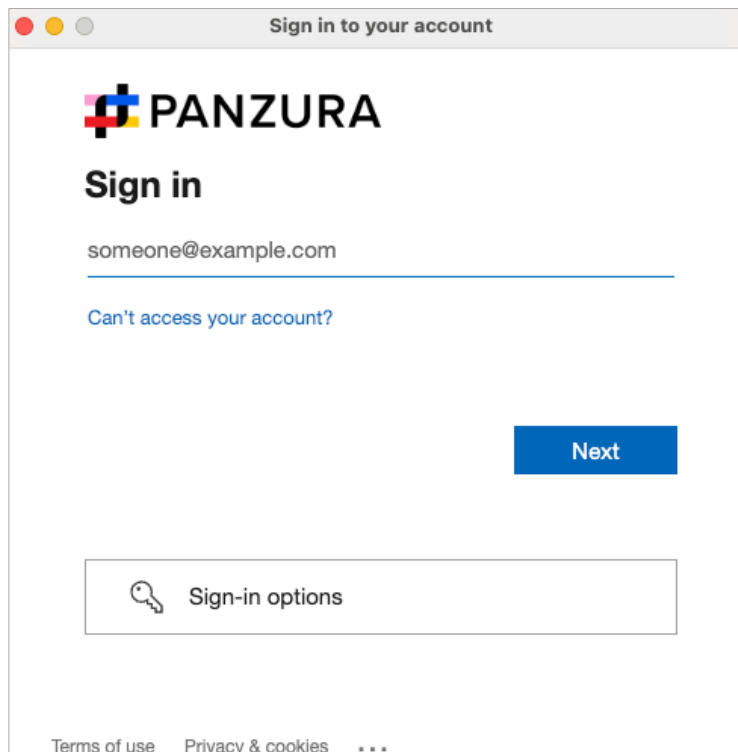
Login Method: Password, **SSO**, Device Authorization Code

Server URL: https://demo-edge.panzura.com

Proxy settings

Log in

3. You are redirected to the **SSO Login page**. Enter your username and SSO password to log in.



Sign in to your account

PANZURA

Sign in

someone@example.com

[Can't access your account?](#)

Next

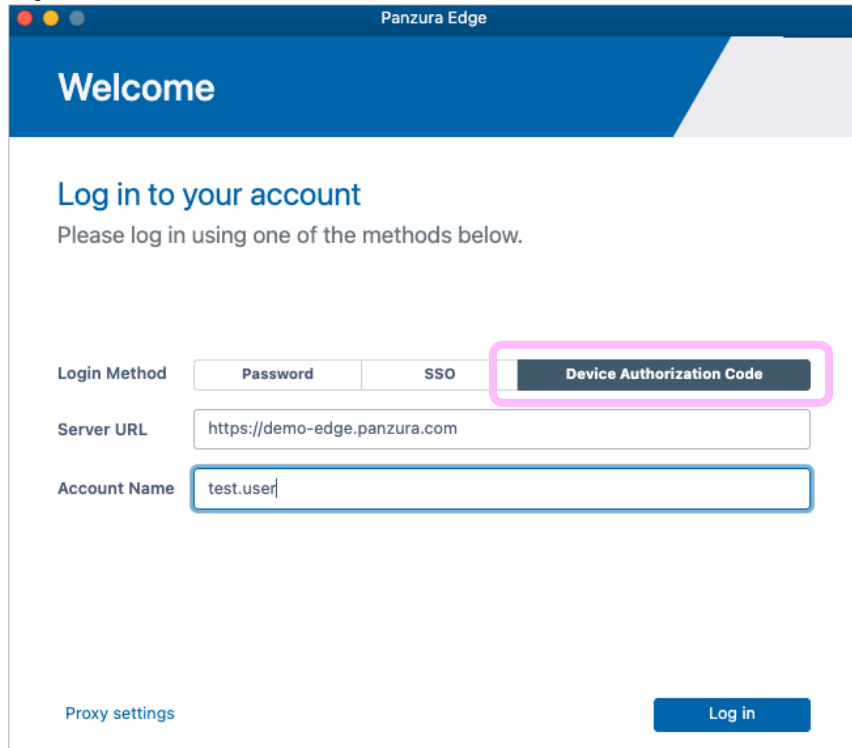
Sign-in options

Terms of use Privacy & cookies ...

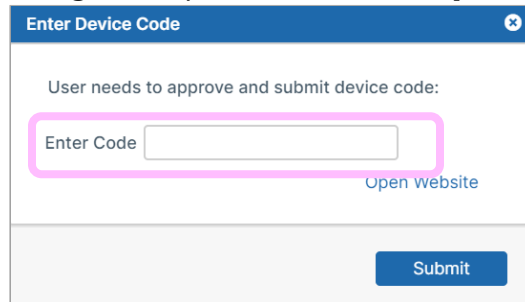
Log in with Device Authorization Code

If you want to log in with Device Authorization Code, follow the next steps:

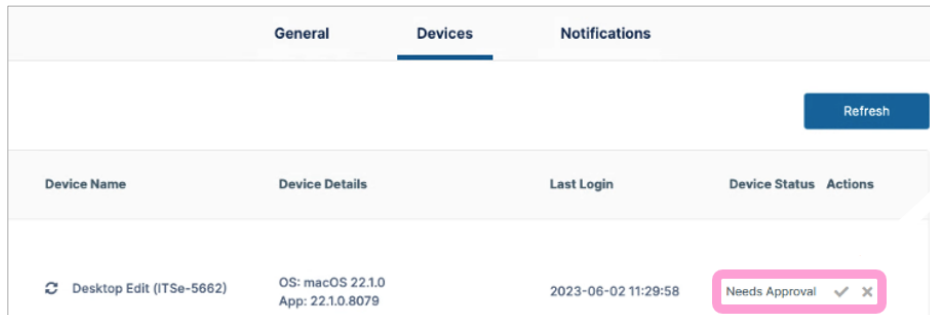
1. Select the **Device Authorization Code** for Login Method. The following screen will appear. Enter your server URL and account name (username).



2. An *Enter Device Code* dialog box opens. Click the **Open Website** link.



3. The login screen of the user portal opens. Log in to the user portal.
4. In the upper-right corner of the screen click on your username and choose **Settings**.
5. In the *Settings* screen, click the **Devices** option.
6. Next to the listing for Panzura Edge, click the **check symbol** to approve the sign in. A dialog box with the device authentication code opens.



7. Enter the authentication code into the Enter Device Code dialog box.

8. Click the **Submit** button.

Log in with Proxy Setting

If you want to log in with Proxy Setting, follow the next steps:

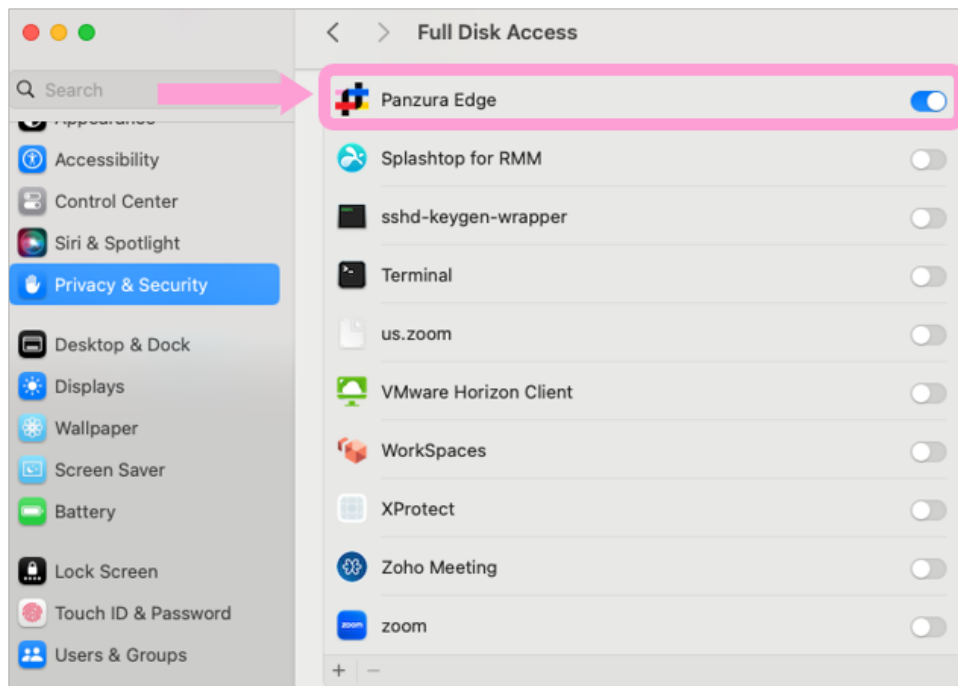
1. Click the **Proxy Settings** link.

2. A dialog box with proxy settings opens. Slide the **Enable Proxy** slider to enable use of proxy settings.

3. Fill in the proxy settings.
4. Click on the **Save** button.

Log in for the first time

The first time you log in, you may be prompted to give **Panzura Edge** full disk access. Follow the prompts to go to **Settings > Privacy and Security > Full Disk Access** and enable **Full Disk Access** for **Panzura Edge** .

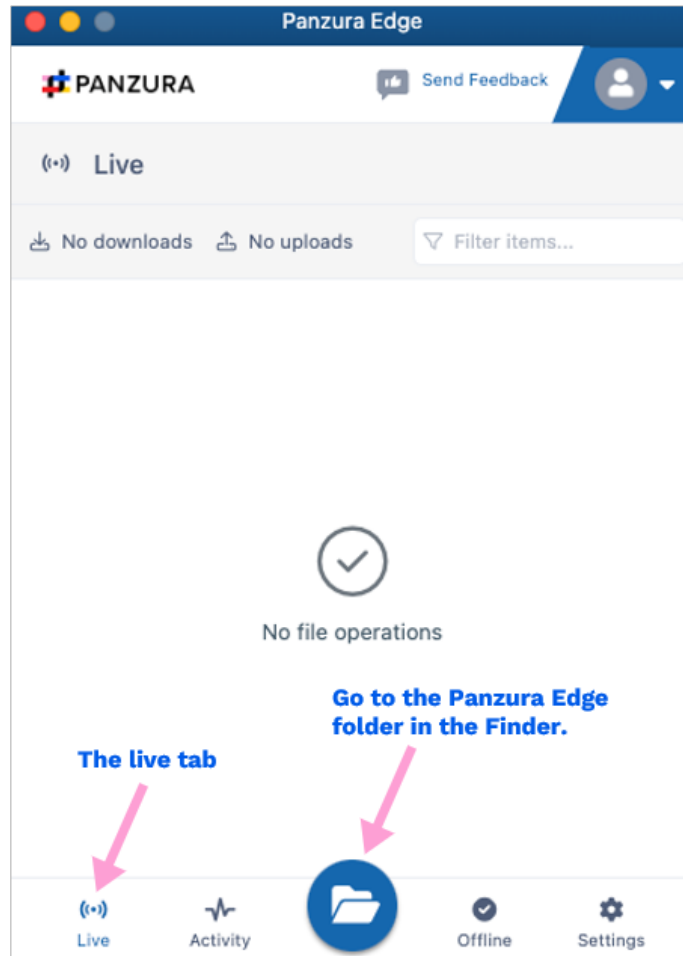


1. Once that is configured, login moves through a few screens introducing you to Panzura Edge, and then opens the Panzura Edge dashboard. The dashboard opens to the *Live* screen.

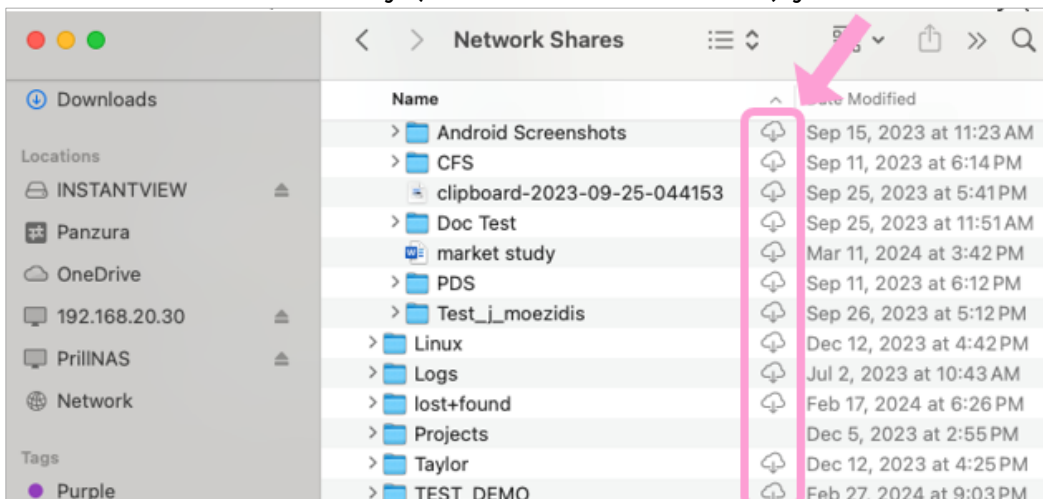
Important Note: Panzura Edge cannot begin tracking and synchronizing online and offline Panzura Edge file activity until you download Panzura Edge folders and files to your local drive. So initially, the *Live* tab appears empty.

2. Click the folder icon at the bottom of the Panzura Edge dashboard to view the Panzura Edge folder, which now appears under *Locations* in your finder.

Panzura Edge Desktop App for MacOS



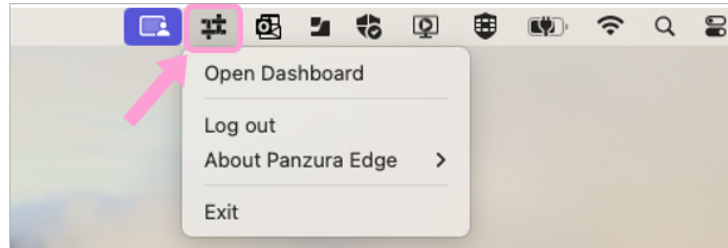
3. If this is the first time you have logged in to Panzura Edge, each file and folder should appear with a cloud icon next to it, which indicates that it hasn't been downloaded locally (made available offline) yet.



Begin setting up Panzura Edge by [making Panzura Edge files and folders available offline](#). For more information about the dashboard, see [Using the Dashboard in Panzura Edge for macOS](#).

Working from the Panzura Edge for macOS Menu Bar Icon

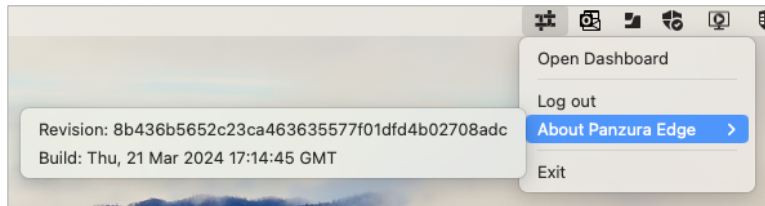
After you login in to Panzura Edge for macOS, a Panzura Edge icon appears in the taskbar. Click the icon to perform Panzura Edge tasks.



Open Dashboard - Opens the Panzura Edge for macOS dashboard.

Log out - Logs the currently logged in user out of Panzura Edge for macOS without shutting down the application.

About Panzura Edge - Shows details about the Panzura Edge build:



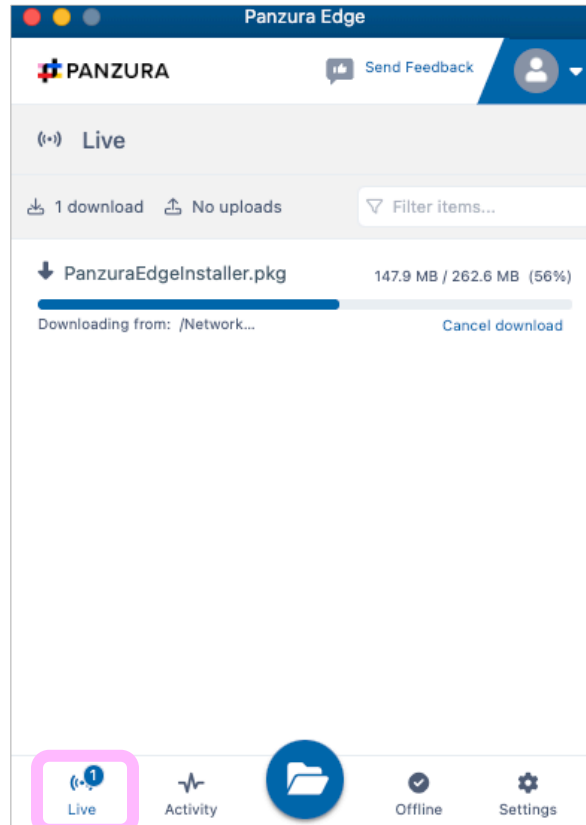
Exit - Closes the Panzura Edge for macOS application.

Using the Dashboard in Panzura Edge for macOS

Panzura Edge for macOS opens to its dashboard, which has the tabs **Live**, **Activity**, **Offline**, and **Settings**, and a button for opening your Panzura Edge website (in the user portal).

Live Tab

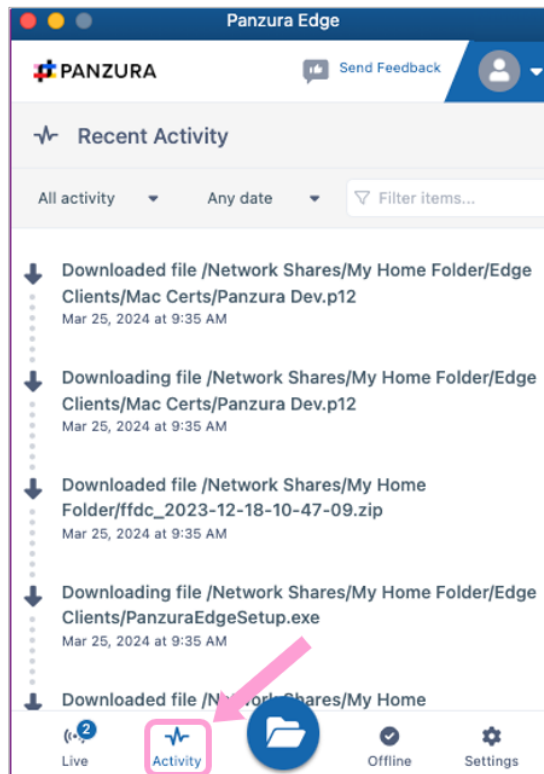
The dashboard opens to the **Live** tab, which displays a list of recently accessed files and folders:



To search for a file or folder in the list, enter a string from its name into the **Filter items** box.

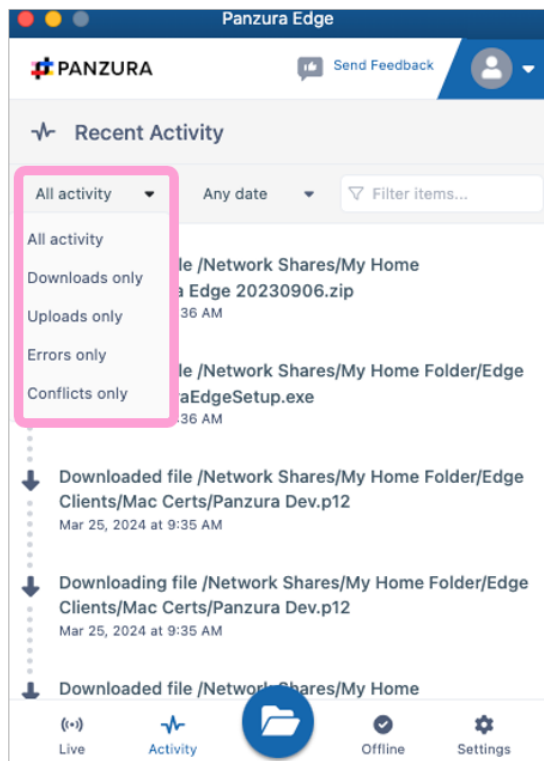
Activity Tab

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

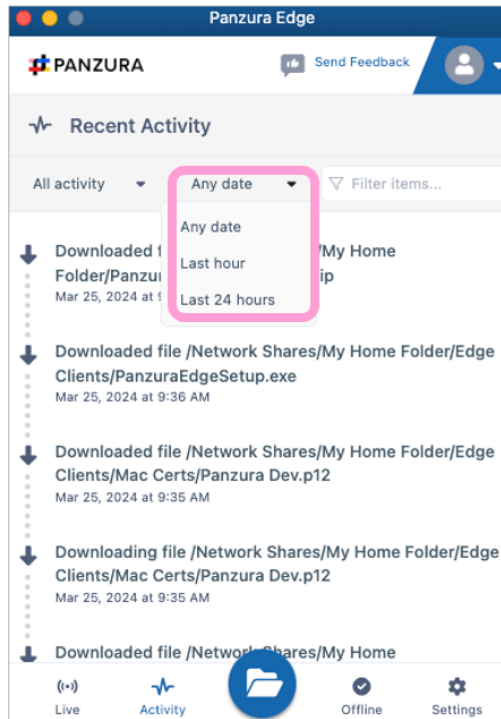


To filter activities on the Activity tab

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



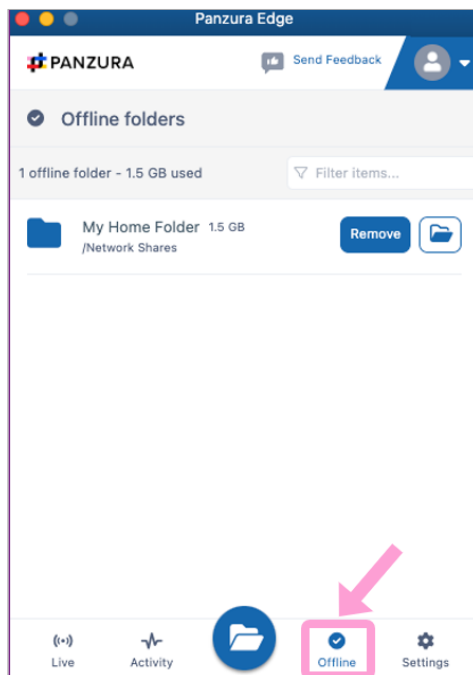
- To filter activities by date, choose **Any date**, **Last hour**, or **Yesterday** in the Date drop-down list.



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

Offline Tab

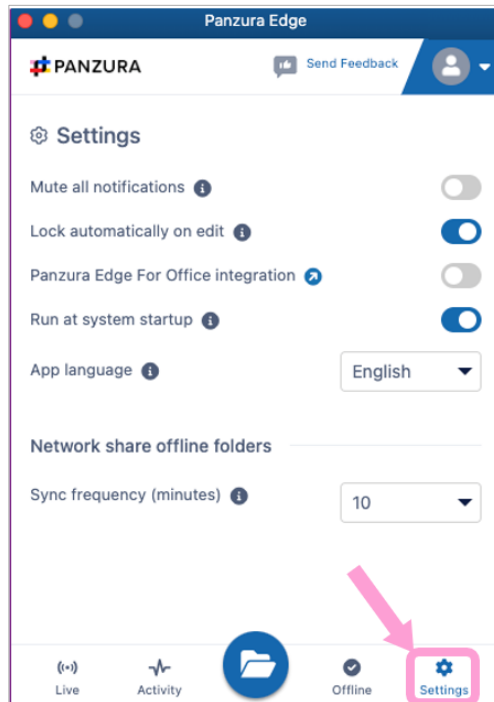
To view folders that you have moved offline using Panzura Edge , click the **Offline** tab.



- To remove folders from the offline location from the **Offline** tab, see [Remove Files from Offline Folders](#).
- To open an offline folder in its location in Mac finder, click the folder icon next to it.

Settings Tab

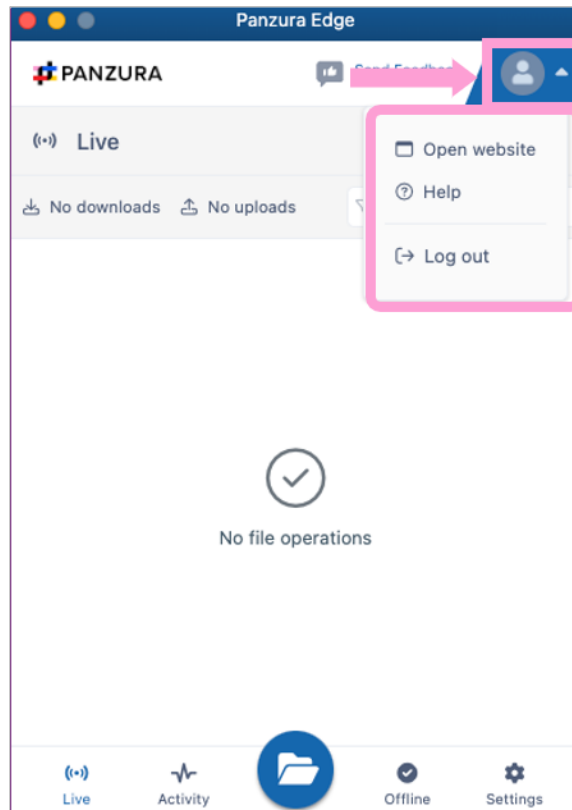
To view Panzura Edge for macOS settings, click the **Settings** tab.



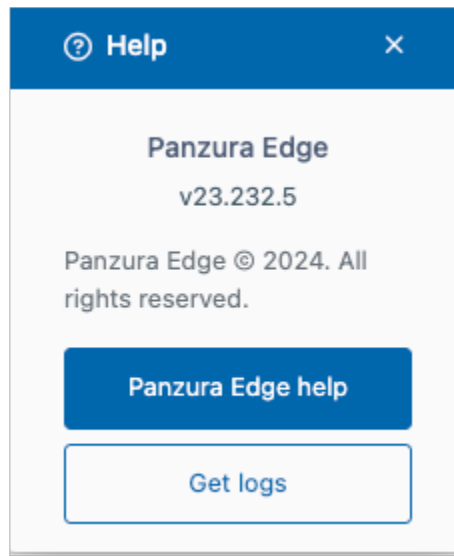
For information about Panzura Edge settings, see [Panzura Edge Desktop Settings](#).

More Options

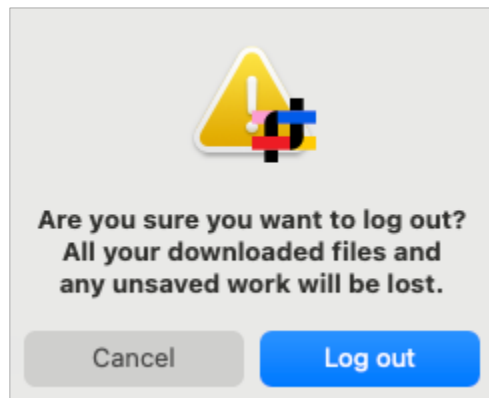
To access more options from the Panzura Edge for macOS dashboard, click the down arrow next to your username:



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



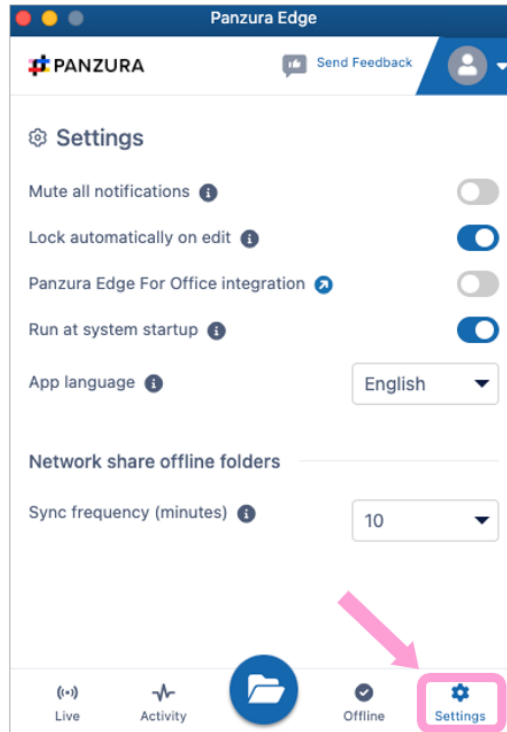
3. Click **Panzura Edge help** to access this end user help.
4. Click **Get logs** to open Mac finder to the Logs folder, where you can access your Panzura Edge for macOS log files.
5. To log out of Panzura Edge for macOS, click **Log out**. A warning appears:



This means that in addition to logging you out Panzura Edge clears and removes the Panzura Edge folder that appears in the Finder.

Panzura Edge Settings

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



Setting	Description
Mute all notifications	When enabled, all notifications sent from Panzura Edge are turned off. Default is disabled .
Lock automatically on edit	When enabled, files opened for edit through Panzura Edge are locked, and other users cannot edit them. When the files are closed, they are unlocked again. Default is enabled .
Run at system startup	When enabled, begin running Panzura Edge when the system starts. Default is enabled .
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.

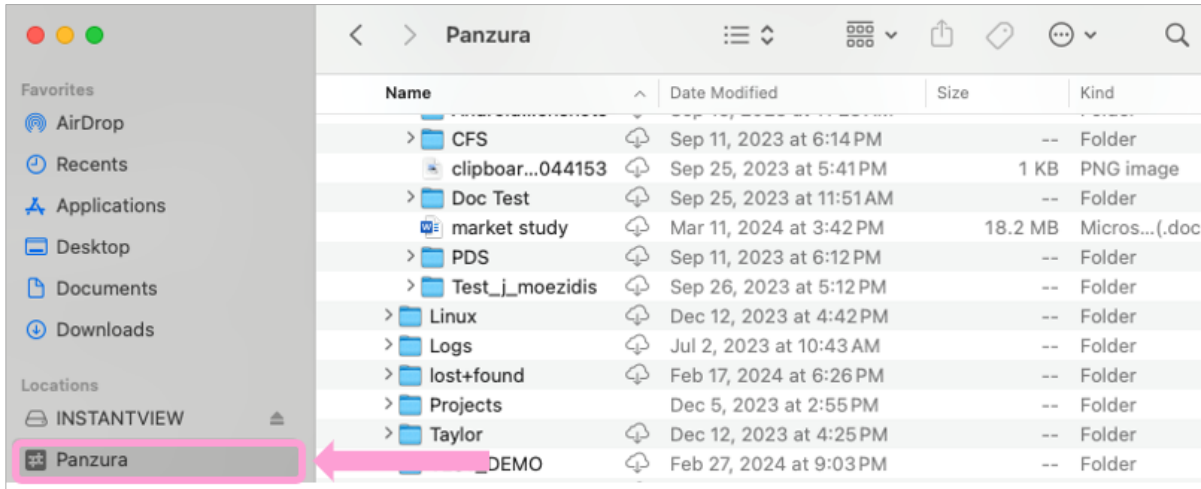
Make Files and Folders Available Offline

To use Panzura Edge for macOS 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.

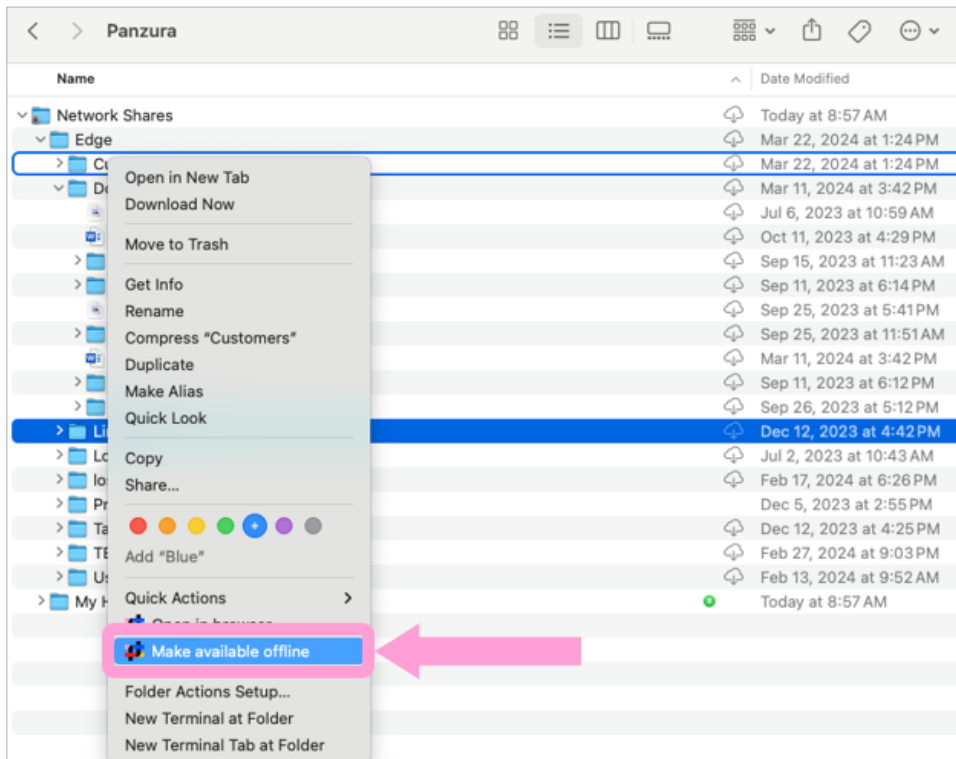
When you log in to Panzura Edge, your Panzura Edge folders become available in your finder in a **Panzura Edge** folder:

To mark files and folders Available Offline:

1. In your finder, locate the Panzura Edge folder.

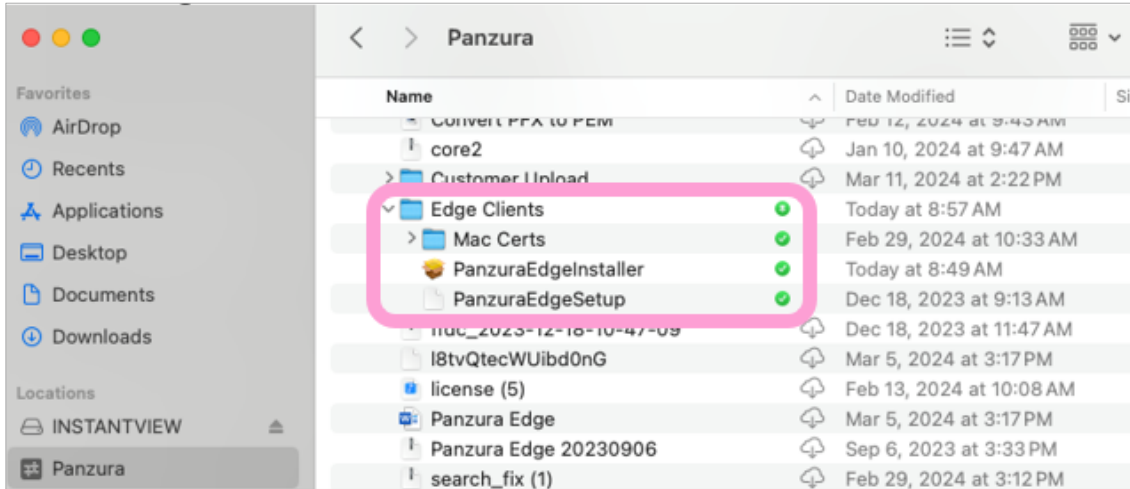


2. Right-click on each folder with contents that you want to be able to synchronize and choose **Quick Actions > Make available offline**.



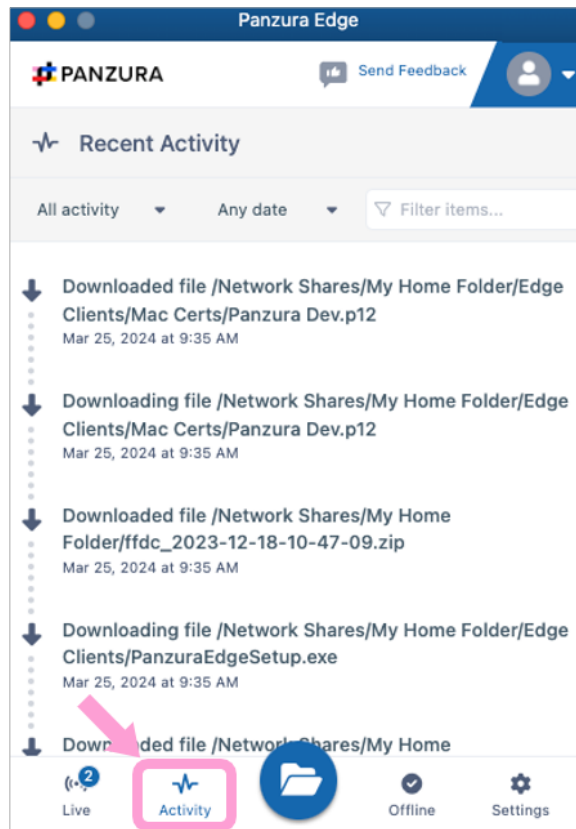
- Panzura Edge downloads the folders and their contents to your local drive (and moves them into its offline folder) and replaces the cloud icon with a green icon to indicate that they are available for synchronization with Panzura Edge.

Note: If you click **Download Now** next to a file or folder you can edit it offline, but it is not in a Panzura Edge offline folder, and its changes aren't synced with Panzura Edge. Files downloaded with **Download Now** do not display an icon (neither the cloud icon nor the green icon) next to them. You are still able to choose **Make available offline** for the folder to put it into an Panzura Edge offline folder that will sync with Panzura Edge.

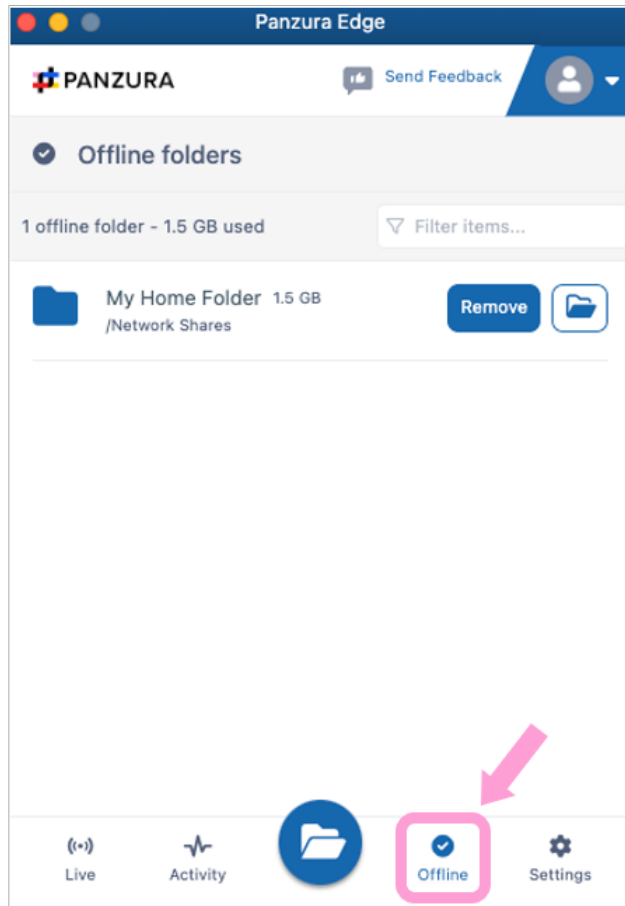


Panzura Edge's dashboard shows you the progress of the files being downloaded on the **Live** tab. These disappear as soon as download is complete.

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



The Offline tab shows you the folders that you have just made offline:

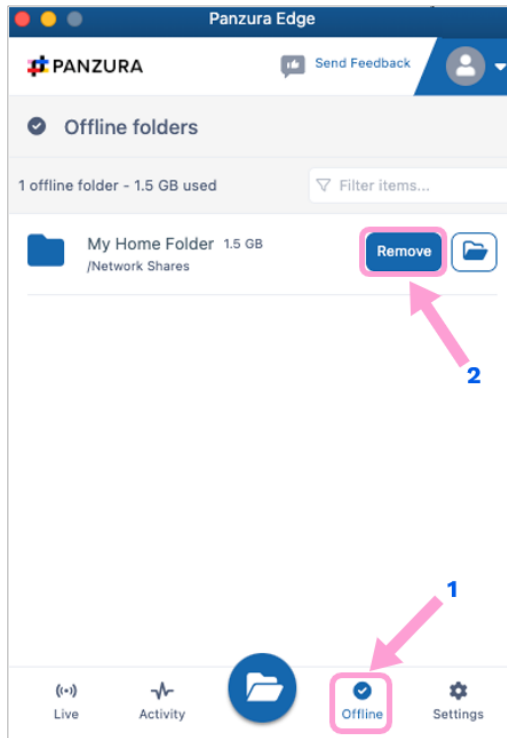


Remove Files from Offline Folders

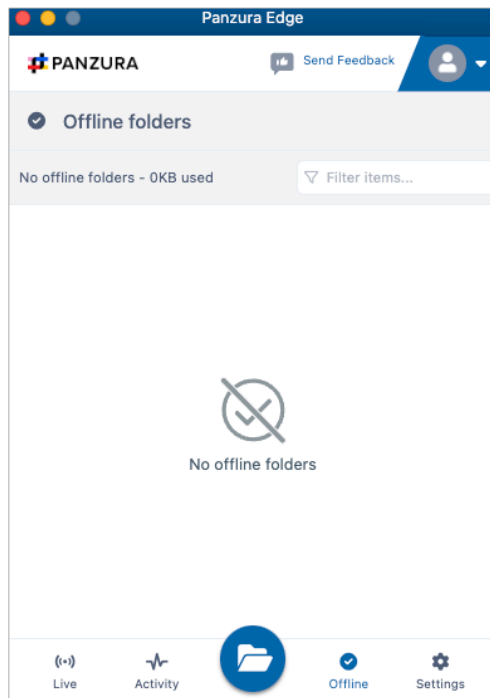
You can remove a file's ability to be edited offline by removing it from the offline folder, either through the Panzura Edge dashboard or through your Mac's Finder.

To remove a file from the offline folder through the Panzura Edge dashboard:

1. In the Panzura Edge dashboard, click the **Offline** tab.
2. Click the **Remove** button next to the file that you want to remove from the Offline folder.



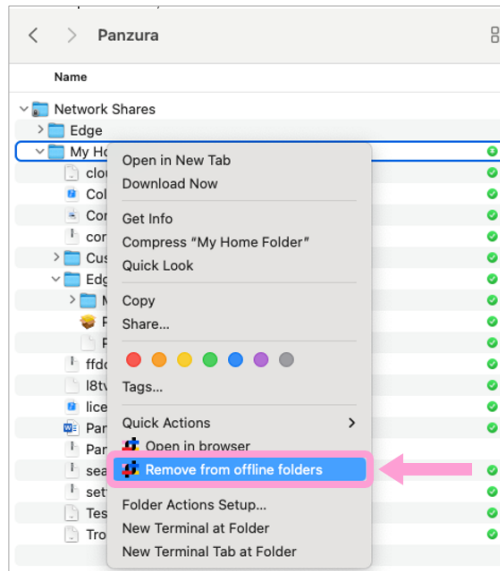
The file is no longer available offline. It no longer appears on the Offline tab of the Panzura Edge dashboard and the offline icon no longer appears next to it in the Finder.



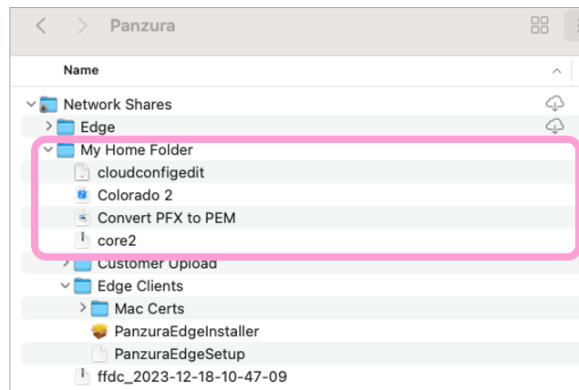
To remove a file from the offline folder through the Finder:

1. In the Finder, right-click on the file (it should have a green icon next to it). In the drop-down list, click **Remove from offline folders**.

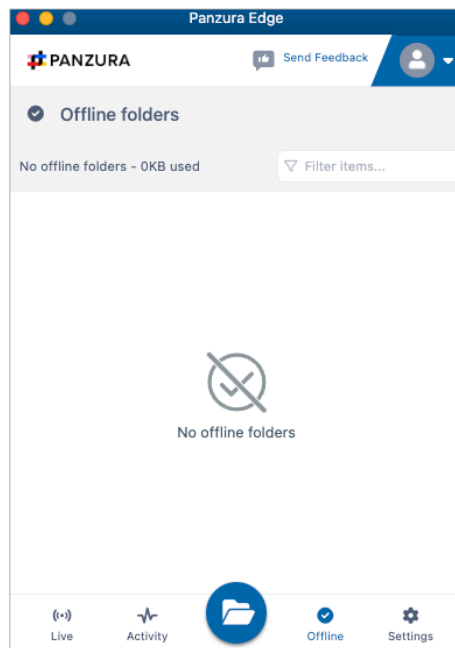
Panzura Edge Desktop App for MacOS



2. The green icons no longer appear next to the folder or its contents.



3. The file is no longer listed on the **Offline** tab of the Panzura Edge dashboard.



How Panzura Edge for macOS handles change conflicts

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

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

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

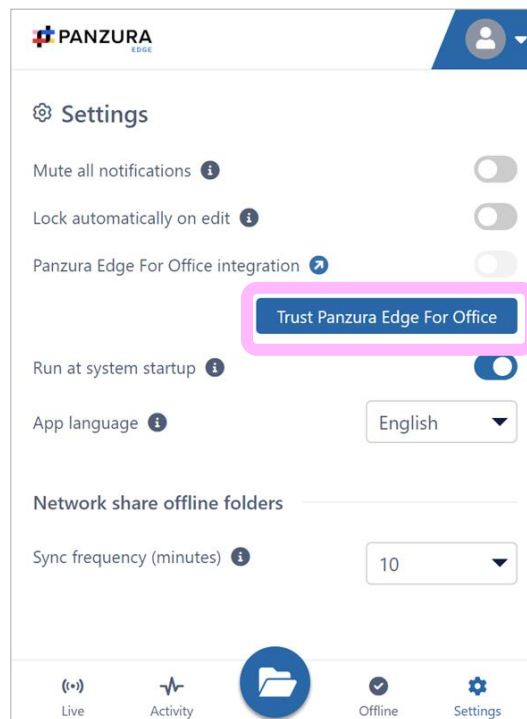
Using Panzura for Office with Panzura Edge Desktop for macOS

Note: Panzura for Office is an MS Office add-in for Word, Excel, and PowerPoint files which can be used with Panzura Edge Desktop. It is available in Panzura Edge beginning with version 23.241.

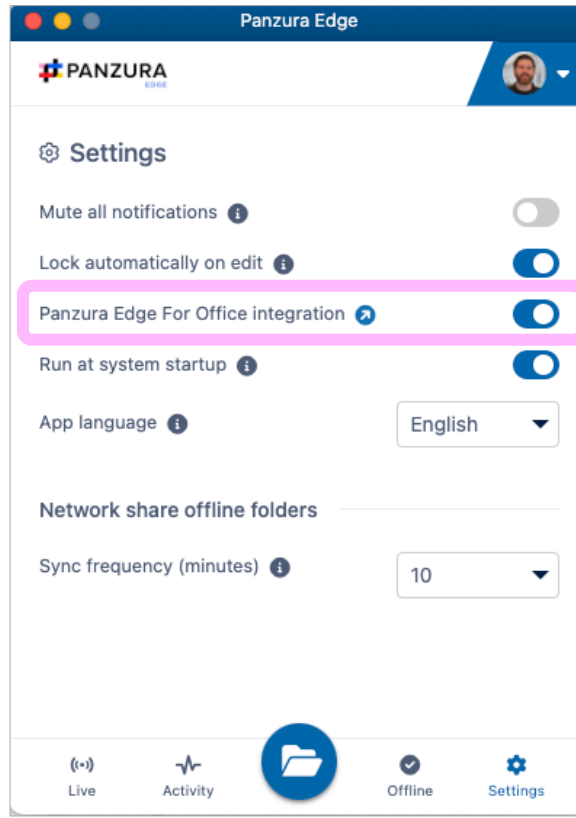
Confirm that you trust Panzura for Office

Before using Panzura for Office with Panzura Edge Desktop for macOS, confirm that you trust Panzura for Office and enable it as shown in the following procedure.

1. Log in to Panzura Edge Desktop for MacOS and then click **Settings** tab.
2. In the Settings tab, click Trust Panzura for Office button.



- The **Trust Panzura Edge for Office** button disappears, and the slider for **Panzura for Office integration** becomes accessible. As this slider is turned off by default, turn it on so you can use Panzura for Office.

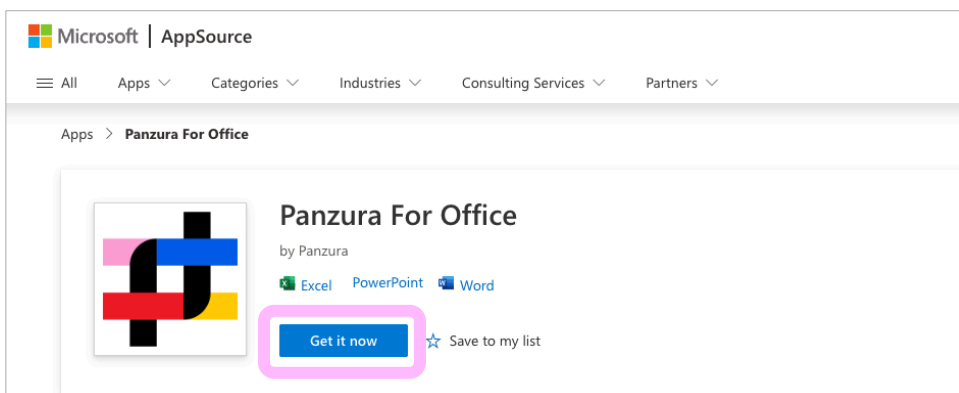


- Panzura for Office is now enabled, but to use it in Office files, you must attach the add-in to each type of Office file from your Panzura Edge Desktop directory.

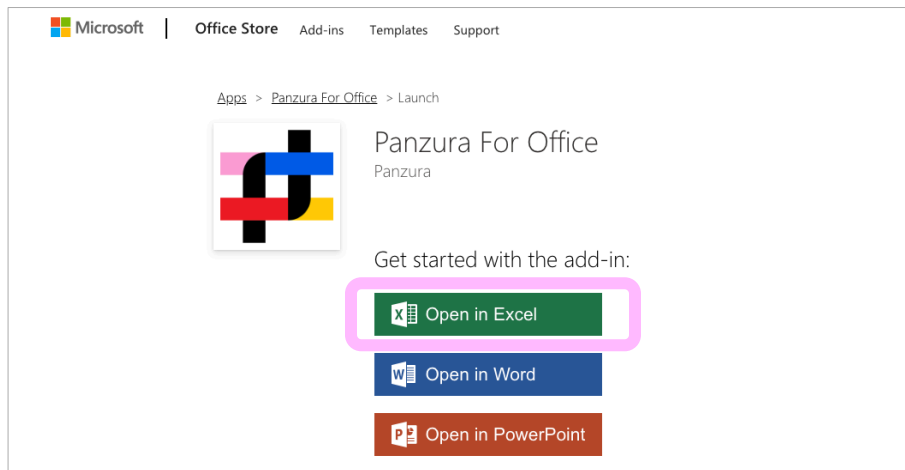
Add Panzura for Office to the Office files

To add Panzura for Office to the Office files that you access through the client app, perform the following procedure once each for a Word, an Excel, and a PowerPoint file in the client.

- Browse to: <https://appsource.microsoft.com/en-us/product/office/WA200007448?flightCodes=Panzura>
- Click **Get it now**.



3. Click **Open in Excel** to add Panzura for Office to Microsoft Excel.



4. Repeat this procedure for the other two types of Office files.

Panzura for Office is now attached to all Office files in your client folder. Just click **Panzura** in the toolbar to view it.

Working with Panzura for Office in Panzura Edge Desktop for macOS

The Panzura 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

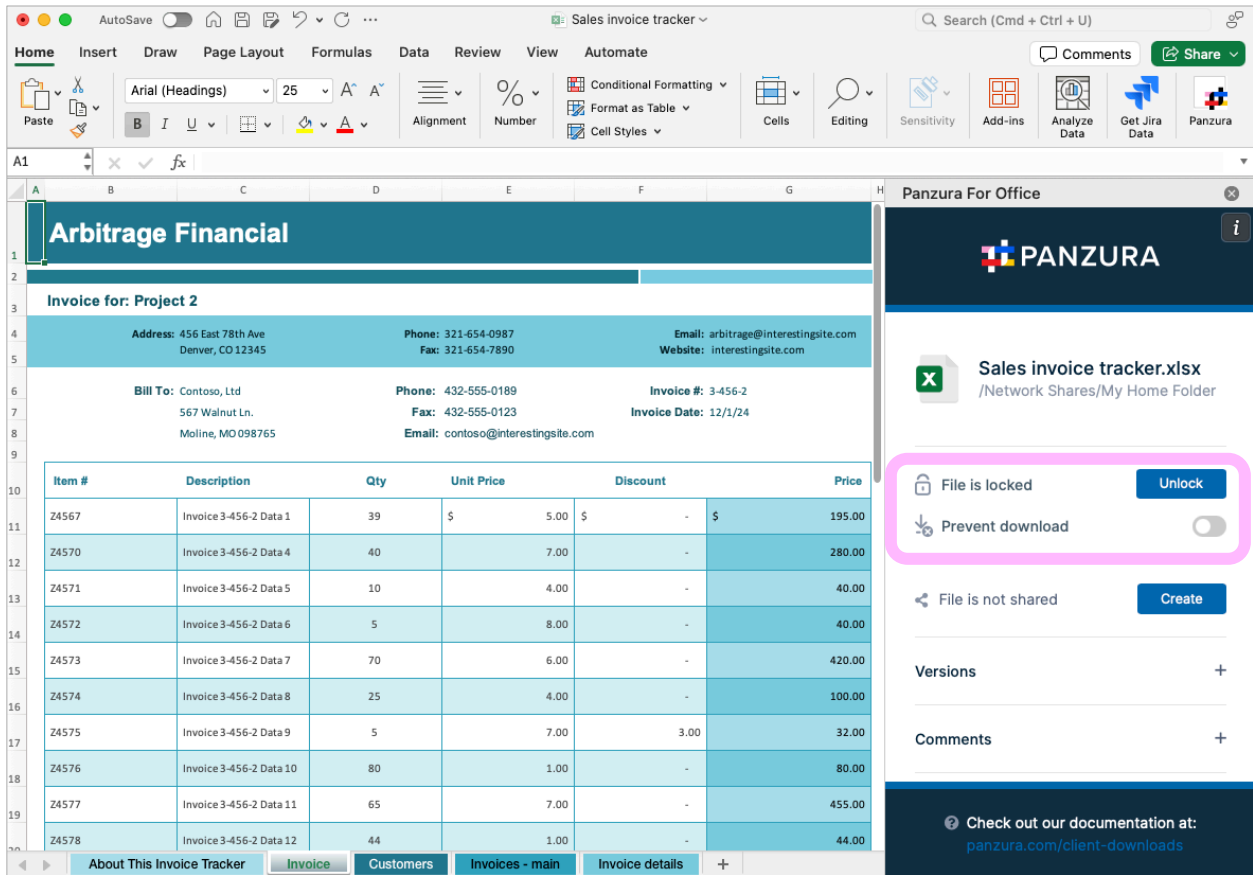
You can use the file locking function in Panzura for Office to:

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

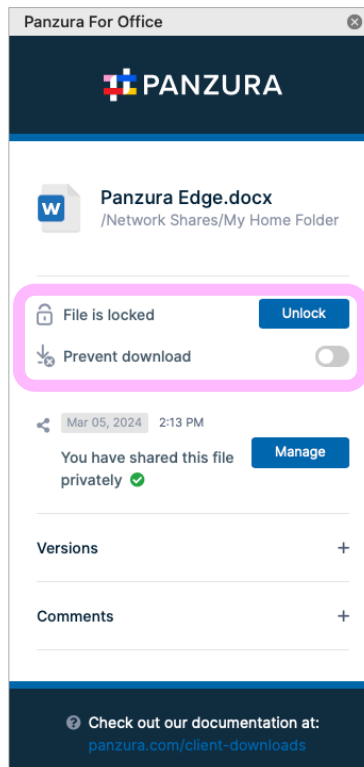
If a shared file is not locked when you open it for edit, another user can also open the file and make changes. To avoid this, by default, Panzura for Office automatically locks files for editing when they are opened.

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

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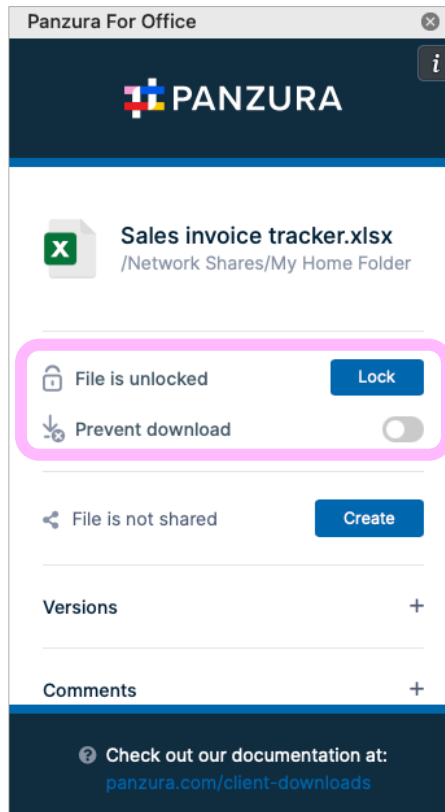


To prevent other users from downloading or reading the file while it is locked, click the **Prevent download** slider.



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.

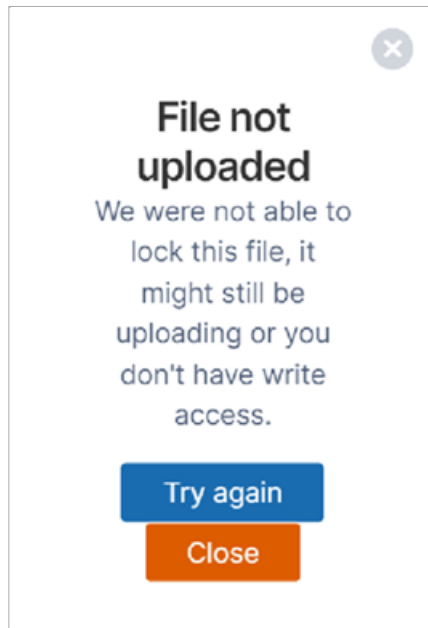
Lock Status	Access by lock owner	Access by others
File is locked (download allowed)	Read and modification allowed	Only read is allowed, no modification is allowed
File is locked (download prevented)	Read and modification allowed	Neither read nor modification is allowed
File is not locked	Read and modification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

For a locked file with download (read) prevented:

- If USER1 has locked (and read blocked) the file:
 - The Panzura client will not download the file for USER2
- However, if USER2 has already downloaded the file in Sync or Drive, then:
 - Panzura Sync will allow Panzura for Office to open the file.
 - Panzura Drive will not allow the file to be opened by USER2, unless Drive has already cached the file.

If an admin prevents file locking after a user has locked a file in a client:

- The lock is automatically removed from the file
- Additional files cannot be locked using Panzura for Office, and when you attempt to lock a file, an error message will appear.



Share a file

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

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

The screenshot shows the Panzura For Office interface. On the left, a spreadsheet titled 'Arbitrage Financial' is open, displaying an invoice for Project 2. The spreadsheet includes a table with columns for Item #, Description, Qty, Unit Price, Discount, and Price. The right-hand panel shows the file 'Sales invoice tracker.xlsx' with options to 'Unlock', 'Prevent download', and 'File is not shared' (highlighted with a pink box and a 'Create' button). Below these are sections for 'Versions' and 'Comments'. At the bottom of the panel, there is a link to 'Check out our documentation at: panzura.com/client-downloads'.

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

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

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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.

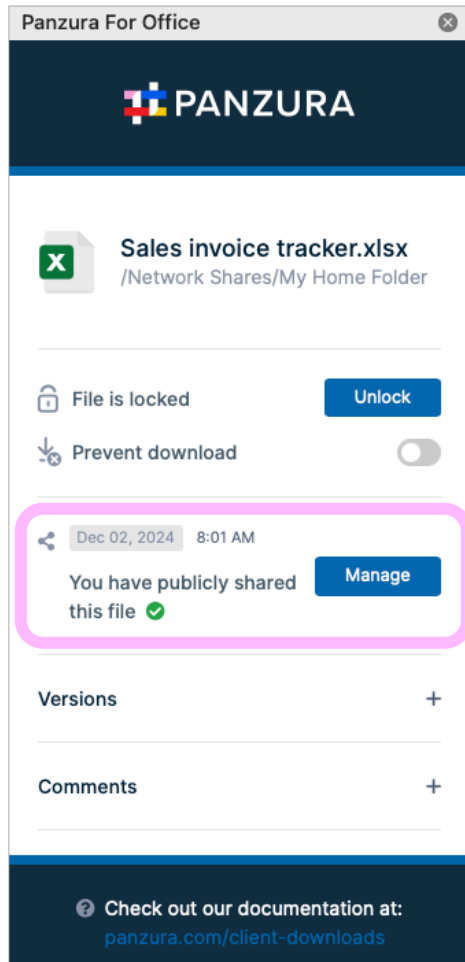
Allow View + Download [password field] [Share] [Save]

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

2. Share the file using the same settings and options that you would for a share in the user portal.

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 for Office.

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



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

Panzura for Office log locations

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

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

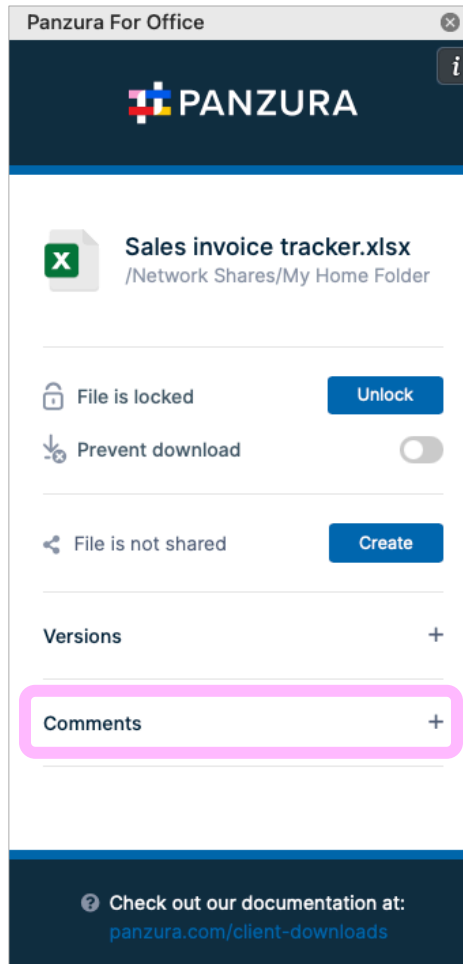
View and add comments

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

To view and add comments in Panzura for Office:

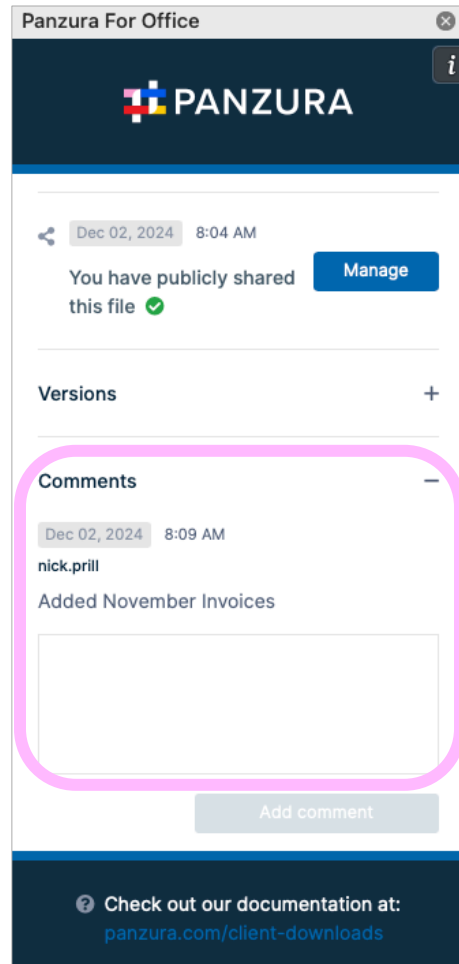
1. If Comments is not visible in the Panzura for Office panel, scroll down to the bottom of the panel.
2. Click the + across from Comments.

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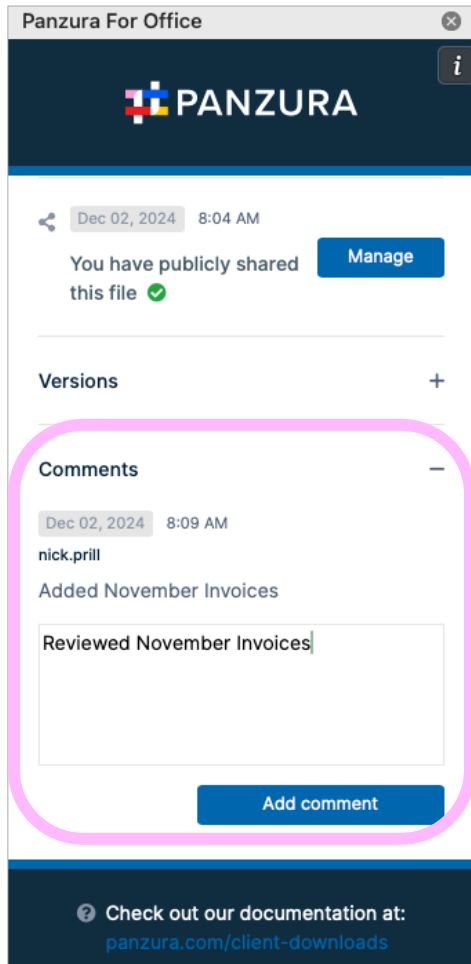
Any existing comments added to the file or folder here or anywhere else in Panzura appear above the Comments box.

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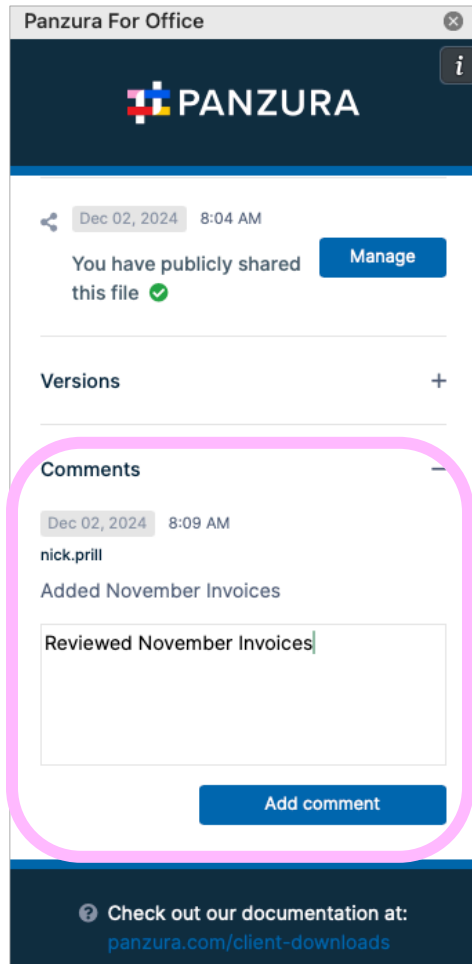


3. To add a new comment, click inside the Comments box and enter the comment.

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4. Click **Add comment**. The comment is added.



Panzura for Office FAQs

What applications does Panzura for Office works 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