



Secure Client Portal - User Guide

March 2014

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Before You Begin

Please read this User Guide in its entirety before submitting a support ticket or calling GetNetSet for assistance. The portal is a great tool that isn't very difficult to learn or use. It *does*, however, require the user to understand how to accomplish certain tasks – so there *is* a modest learning curve. Every effort has been made here to anticipate and answer all of the common questions encountered by new users. When you read this User Guide, the objective isn't to memorize every facet of the portal's use, but to gain a reasonable understanding of core procedures and to know where to turn *immediately* if questions or problems arise. If you *do* encounter an issue that isn't addressed here, please send GetNetSet support an e-mail. We'll help you resolve it and, if needed, revise this guide accordingly. Thank you!

Activation

- Your GetNetSet secure client portal cannot be activated until your website has been published under its domain.
- Some GetNetSet clients *postpone* using the portal while still others choose *not* to use it at all.
- For these reasons, GetNetSet does *not* automatically activate portals.
- Please contact GetNetSet support to request portal activation.

E-mails that are sent when your portal is activated:

1. A notification and log-in invitation that is sent directly to you by the portal system. The subject line will be "*System Admin Added You to ShareFile*" and the sender will be "*mail@sf-notifications.com*." Note: If you've been advised that your portal has been activated and you do *not* receive this e-mail, please check your e-mail account's spam/junk folder. With some e-mail configurations, it may be necessary to sign into the e-mail server via web browser (a.k.a. 'webmail') to access the spam/junk folder.
2. A confirmation message that is sent to you by GetNetSet support containing instructions and links. Please, contact us if you do not receive this e-mail.

Storage & Bandwidth Limits

Your secure client portal is a 'slice' of a larger portal obtained by GetNetSet through a special volume license agreement with the vendor. That agreement caps each portal to 1 GB (1,000 MB) of combined upload and download bandwidth each calendar month, and to a maximum of 1 GB (1,000 MB) of stored content. To reiterate:

- “Bandwidth” is the combined volume of data uploaded to, and downloaded from, your portal in a calendar month. The measurement includes all uploads and downloads irrespective of source and destination. Please caution your users to be judicious, even sparing in it's use. It is important to avoid unnecessary uploads and downloads. Bandwidth consumption is cumulative and no adjustments are possible, even for unintentional and incomplete transfers. Your monthly quota can be easily consumed prematurely if care is not taken in this regard. The bandwidth measurement resets at the start of the first day of each calendar month.
- “Storage” is the amount of space consumed by content residing in your portal. The measurement includes all content that is stored there, old and new, so please take care not to allow 'clutter' to accumulate. A good 'standard operating procedure' is to regularly delete from the portal any content that does not need to be stored there. For example, once you have uploaded a file, obviously you already have a local copy. The copy in the portal can be safely deleted once you've confirmed that it has been successfully downloaded by the recipient.
- Moving content around within the portal does *not* count towards bandwidth consumption.

If You Need More Storage or Bandwidth

In accordance with it's licensing arrangement, GetNetSet, cannot offer additional bandwidth or storage with these portals. While the vast majority of our clients operate well below these limits, not all of them can, or do. In the event you discover that you need more bandwidth or storage, please let us know. We will promptly refer you to the vendor so you can obtain a portal directly from them. We can subsequently modify your website's code to connect it to the new portal.

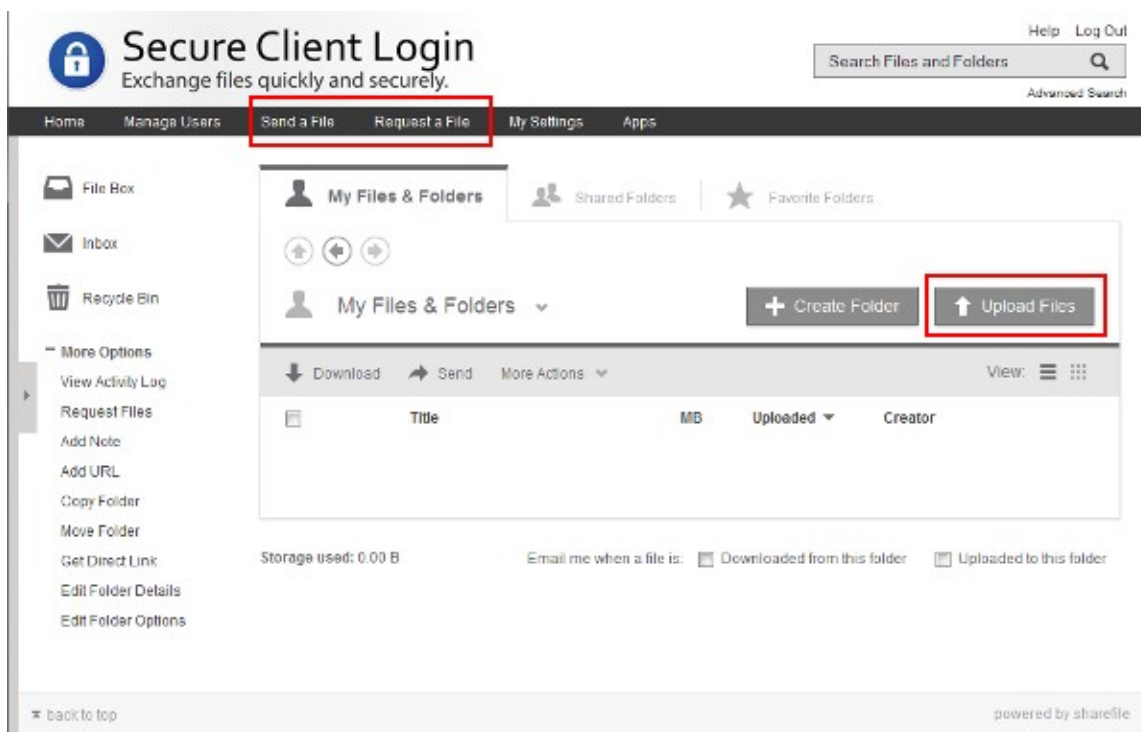
Day to Day Usage

Two methods are provided for securely exchanging files. The first method does *not* require that the other party have a regular portal user account or dedicated folder. The second method *does* have these requirements. To explain:

- You can e-mail invitations to anyone to upload or download files. These invitations can be sent from the folder where you want the remotely uploaded content to 'land.' Similarly, invitations to download are sent from the folder containing the files to be downloaded.
- You can create user accounts and grant folder access to anyone that you anticipate will be using your portal on an ongoing basis. When exchanging files with these users, sending invitations to upload or download files is unnecessary. Instead, folders can be configured to automatically notify specific parties whenever files have been uploaded to, or downloaded from them.

Quick Start

This section is designed to get you securely exchanging files in just a few minutes. The only prerequisite is that you can successfully sign into your portal.



'Send a File', 'Request a File' and 'Upload Files'

To send a file securely, it must first be uploaded to the portal. “Sending” means e-mailing a 'download' invitation to another party. What they receive is a link to a secure page where the file is presented for them to download. This method does *not* require that the other party have a portal user account or dedicated folder. *User Tip:* You can upload files in advance *or* as part of creating an invitation. Similarly, when requesting a file, you are e-mailing an 'upload' request to another party. What they receive is a link to a secure page which enables them to upload the requested file. This method *also* doesn't require that the other party have a portal user account or dedicated folder.

Notes: For added security, you may require other parties to log in before downloading or uploading files. If they do not already have a ShareFile account, one will automatically be created for them and they will be e-mailed their username and password. Also, when requesting files, keep in mind that the default upload location is 'File Box', which is temporary storage where files are kept for 30 days. You can either specify an alternate upload location when issuing a request, or you can later move the uploaded files to a permanent folder.

You might find it easier to initially operate your portal in this manner and to gradually transition into creating folders and managing user accounts, and so on, as time progresses. In any event, we recommend reading the entire guide, beforehand, as well as referring to it often as you become acquainted with additional features.

Secure Client Login
Exchange files quickly and securely.

Help Log Out
Search Files and Folders
Advanced Search

Home Manage Users Send a File Request a File My Settings Apps

Send a File (Step 1 of 2)

With Send a File, you can share files by including a hyperlink in an email message. The recipients don't need to be ShareFile users.

Email Sending Options

Send email using ShareFile
 Give me a link I can copy and send using my own email software

* Required

To: * [Personal address book](#)
[Shared address book](#)
[Distribution groups](#)

Subject: *

Message: Remember subject and custom message for next time

Send me a copy of the email
 Require recipients to log in
 Email me when the file has been downloaded

Downloads per user:

back to top powered by sharefile

Step 1: E-Mail Sending Options

1. Select to send the e-mail using the ShareFile form, or, obtain a link that you can copy and send using your own e-mail software.
2. Enter the recipient's e-mail address (or select from address books, distribution groups, if previously entered and available there.)
3. Subject line cannot be empty
4. Message (optional) accompanies the automatically generated download link.
5. Optional: Select 'Remember subject and message for next time'
6. Set remaining options
 - a. send copy to you
 - b. require recipient to log in
 - c. notify you when downloaded
 - d. set maximum number of downloads
7. Click 'Next Step' button

The screenshot shows the 'Secure Client Login' interface. At the top left is the logo and tagline 'Exchange files quickly and securely.' To the right are links for 'Help' and 'Log Out', and a search bar labeled 'Search Files and Folders' with a magnifying glass icon and 'Advanced Search' below it. A navigation bar contains links: 'Home', 'Manage Users', 'Send a File', 'Request a File', 'My Settings', and 'Apps'. The main content area is titled 'Send a File (Step 2 of 2)' with a link to 'View Recipients'. Below this is instructional text: 'To upload a file, click Choose Files. Select files from the pop-up menu, or drag files from your computer on to the box. To upload multiple files at once, hold down the Shift or Control key as you select files.' A note states: 'Note: Folders cannot be uploaded with this tool. To upload a folder, switch to [Java Uploader](#).' Another note says: 'If you have trouble uploading files, you can try using [Flash uploader](#) or [Standard Uploader](#).' The interface features a 'Choose Files' button, the text 'or drag and drop files', and a 'Clear All' button. A large central box contains the text 'DRAG FILES HERE'. At the bottom of this area are an 'Upload Files' button and a 'Back to Previous Page' link. The footer includes a 'back to top' link and the text 'powered by sharefile'.

Step 2: Files to Send

1. Click the '*Choose Files*' button to open your system's file manager and select the files that you want to upload, or
2. Drag and Drop the files that you want to upload into the '*DRAG FILES HERE*' box, then
3. Click the '*Upload Files*' button.
4. When uploading has completed, you'll see the message "File Sent - The file has been uploaded to your File Box where it will expire after 30 days. The recipients will receive an email with a link to download the file." You'll also be presented with a link "*Go to File Box*"

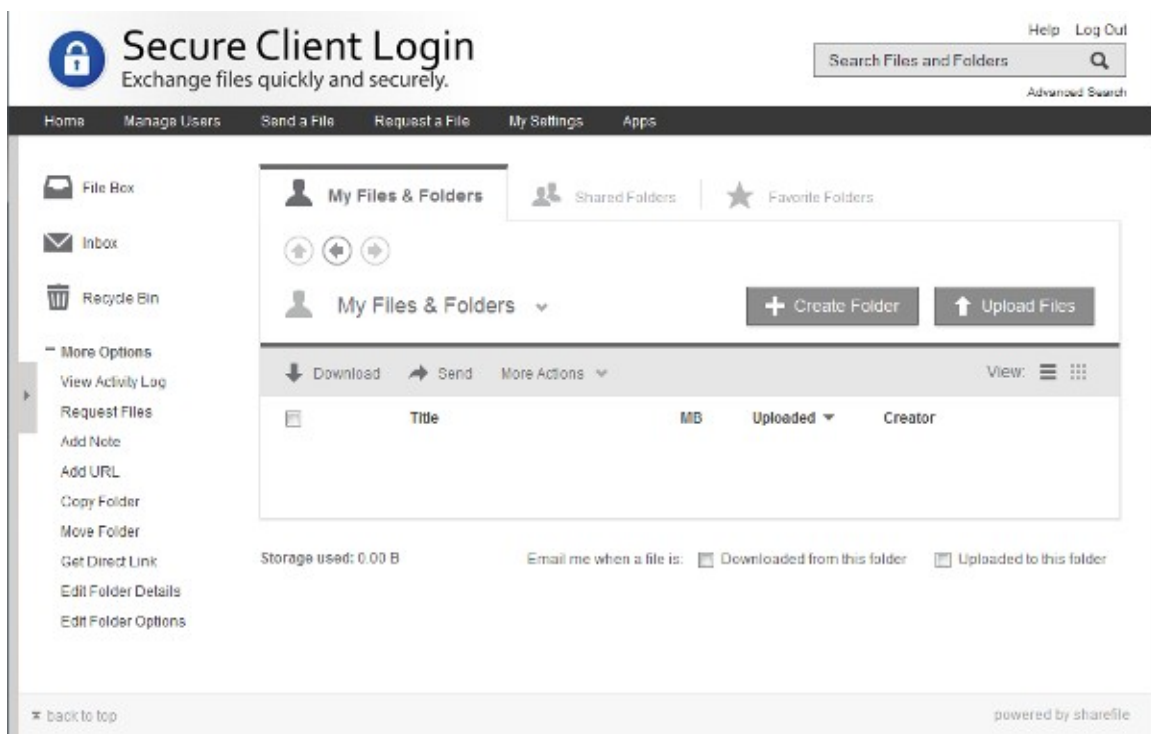
Requesting Files

The '*Request a File*' procedure is virtually identical to '*Step 1: E-Mail Sending Options*,' above. The only differences are:

- i) since you're sending a request to upload, there is no '*Step 2*' where you upload files,
- ii) '*upload access expiration*' can be set instead of numbers of downloads to allow, and
- iii) when you're regularly creating and managing folders, you'll likely be changing the upload location from the default '*File Box*' to the appropriate folder.

Portal Instructions

When you first sign in, you arrive at '*My Files & Folders*,' which is the root folder of your portal.



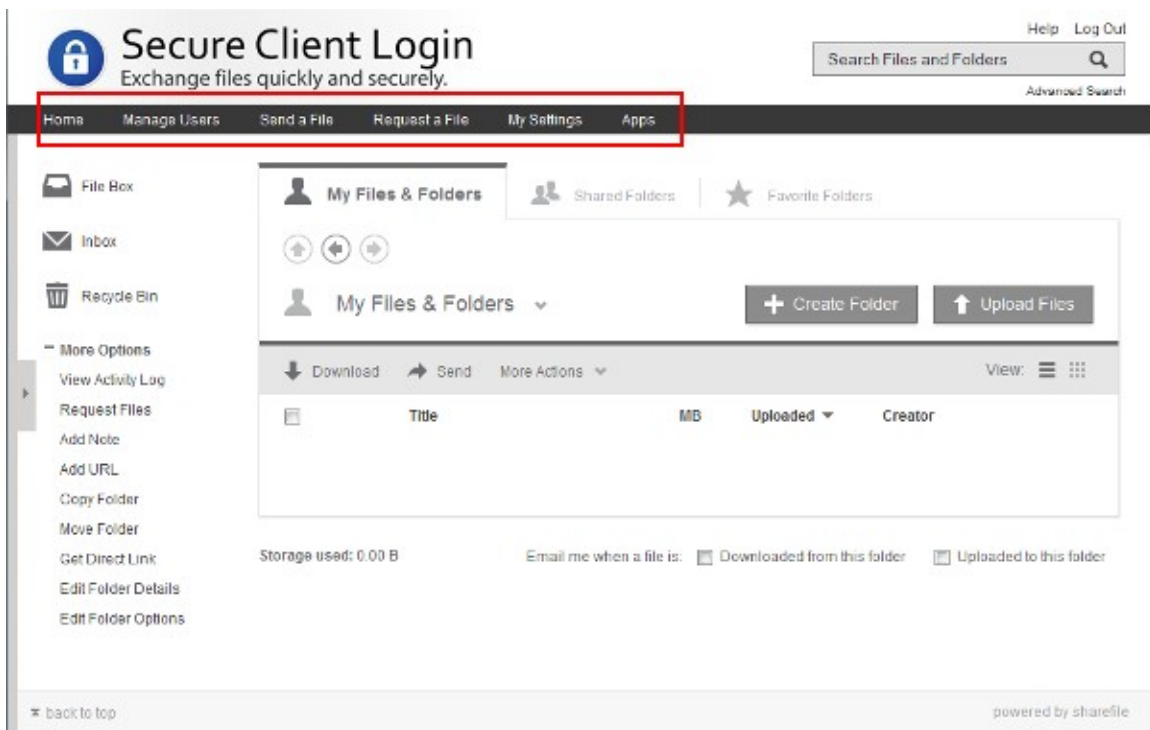
Navigation Tips:

- There is a convenient 'tree view' navigation panel that can be quickly opened and closed by clicking on the light gray tab with dark gray arrow on the left edge of the page. Navigating your portal using this tree view is faster than using the 'Up', 'Previous' and 'Next' buttons if you've created many folders with multiple levels of sub-folders beneath them.
- The '*My Files & Folders*' tab allows you to navigate the entire portal.
- The '*Shared Folders*' tab displays only those folders that you are sharing with other users.
- The '*Favorite Folders*' tab displays only those folders that you have tagged as 'favorite.'
- Clicking '*Home*' at top left will always return you to '*My Files & Folders*'

Where Do I Find ...?

The next section contains descriptions of the various tabs, icons and links that are visible from '*My Files & Folders*.' The descriptions are organized in the following order:

- Top horizontal menu bar, left to right.
- Left side navigation panel: top to bottom.
- Interior elements: starting at the top left, continuing left to right all the way to the bottom.



Horizontal Menu Bar

Manage Users

Create users, update their information, adjust their folder permissions, and so on.

Send a File

“With Send a File, you can share files by including a hyperlink in an email message. The recipients don't need to be ShareFile users.”

Request a File

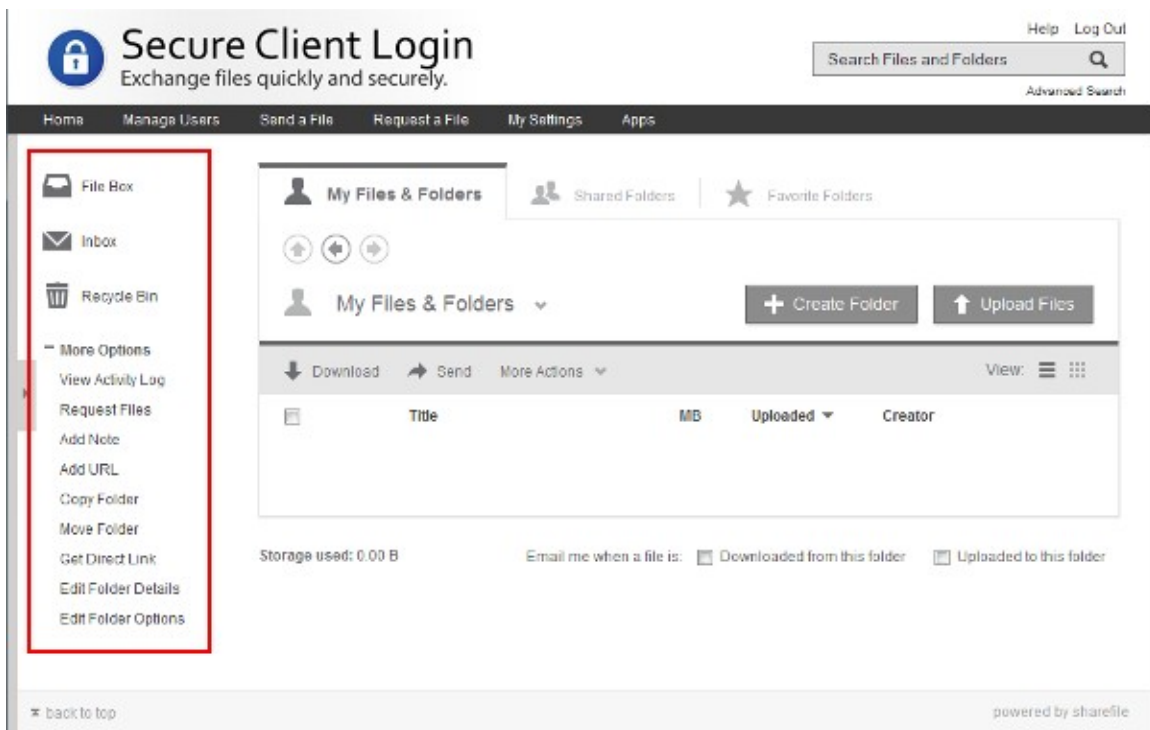
“You can send an email request for a file. Your recipients will get a link that directs them to a secure page where they can upload files. The recipients don't need to be ShareFile users.”

My Settings

Set your time zone and date/time display preferences, add/edit your e-mail addresses, change your password, set upload preferences, find your ftp & WebDAV settings, set your e-mail notification preferences, connect trusted computers and supported applications to your portal, manage your personal address book, set up and manage distribution groups, set up two step verification (an enhanced log-in security feature.) → Note: You will be prompted to re-enter your username and password when you click on “Edit Basic Info”, “Add/Edit Email Addresses” and “Change Password”

Apps

Various applications that you can download and install on your computer or device for integrating portal access and functions to them.



Left Side Navigation Panel

File Box

File Box provides temporary storage where items 'expire' (are sent to *Recycle Bin*) after 30 days.

Inbox

Files sent to you by other users, and requests for files *from* other users, appear here.

Recycle Bin

The recycle bin allows you to restore items that you have deleted in the last 7 days. It also allows you to restore files to your *File Box* that have expired in the last 7 days.

View Activity Log

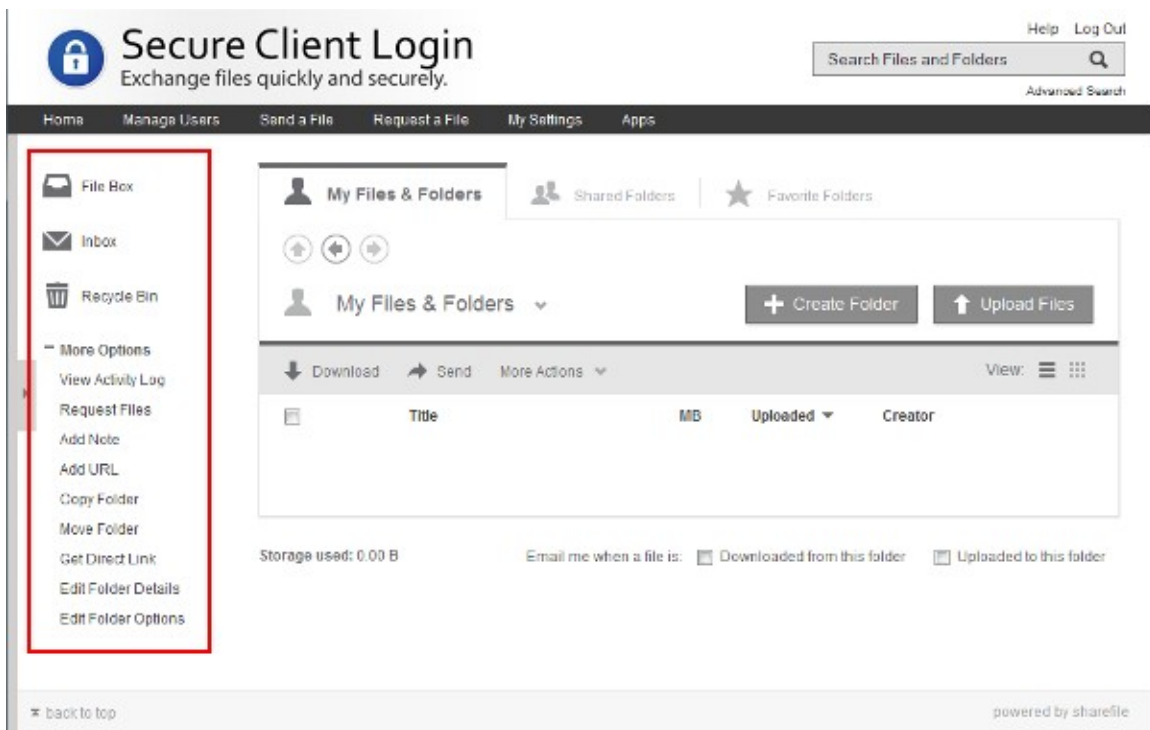
Every transaction that is connected with your portal is logged, including folders created, files/folders edited (attributes,) files/folders moved, files/folders deleted, files/folders restored, downloads/views, uploads, URLs (links) created and 'Notes' created.

Request Files

You can send email requests for files. Your recipients will receive a link directing them to a secure page where they can upload files. *User Tip*: Before issuing email requests for files, browse to the folder where you want the files to 'land' when they are uploaded.

Add Note

Insert a note into the current folder. When the 'title' of a note is clicked, it opens in a pop-up frame for viewing.



Left Side Navigation Panel – Cont'd

Add URL

Insert a link into the current folder. When clicked, the URL opens in a new browser tab or window.

Copy Folder

Create a duplicate of the current folder, including contents, elsewhere in your portal.

Move Folder

Move the current folder, including contents, elsewhere in your portal.

Get Direct Link

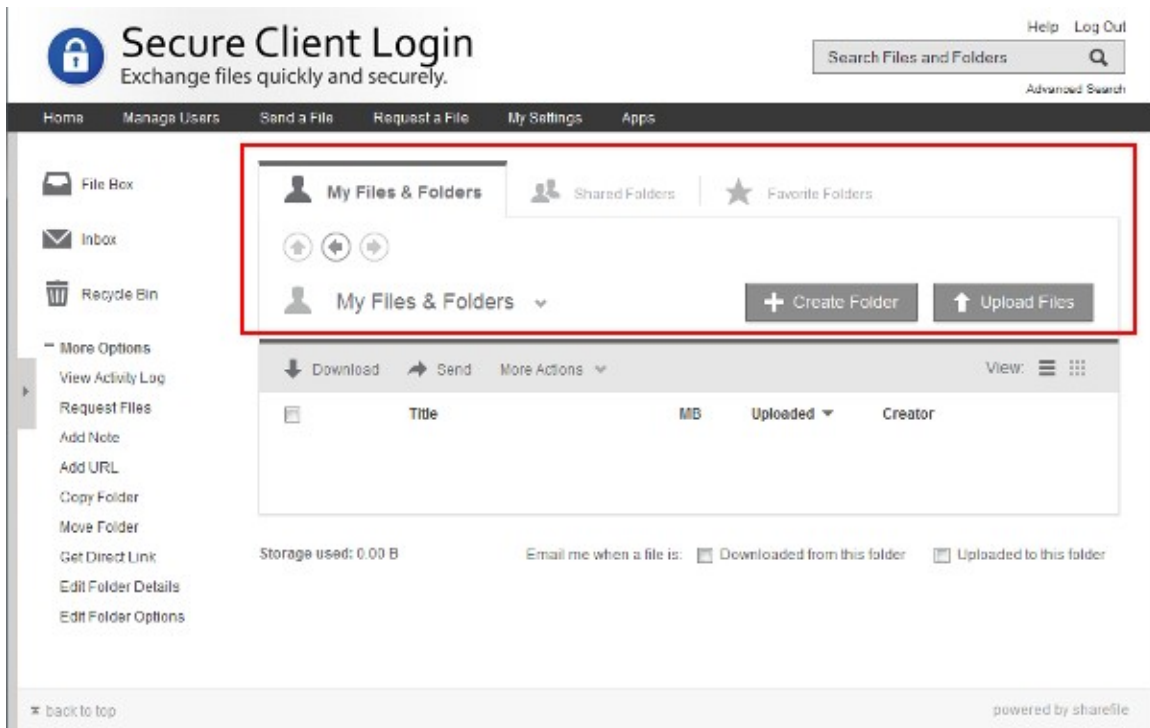
Obtain a direct link to the current folder. Only users who are authorized to access the folder will be able to log in and view it.

Edit Folder Details

Change the current folder's name (“title”) and description (“details.”)

Edit Folder Options

Assign the current folder an expiration date, view the file retention policy, enable/disable file version controls, customize the sort order of items appearing in the folder.



Current Folder - Top

Main Tabs

Directly below the main horizontal menu bar are three tabs, '*My Files & Folders*', '*Shared Folders*' and '*Favorite Folders*.' These tabs have been previously described. See '*Navigation Tips*' on page 3.

Navigation Buttons (circles with arrows)

Below the main tabs are three navigation buttons, “Up,” “Previous” and “Next”. These buttons operate just like a file manager's or web browser's 'up', 'back' and 'forward' buttons.

Current Folder Drop-Down List

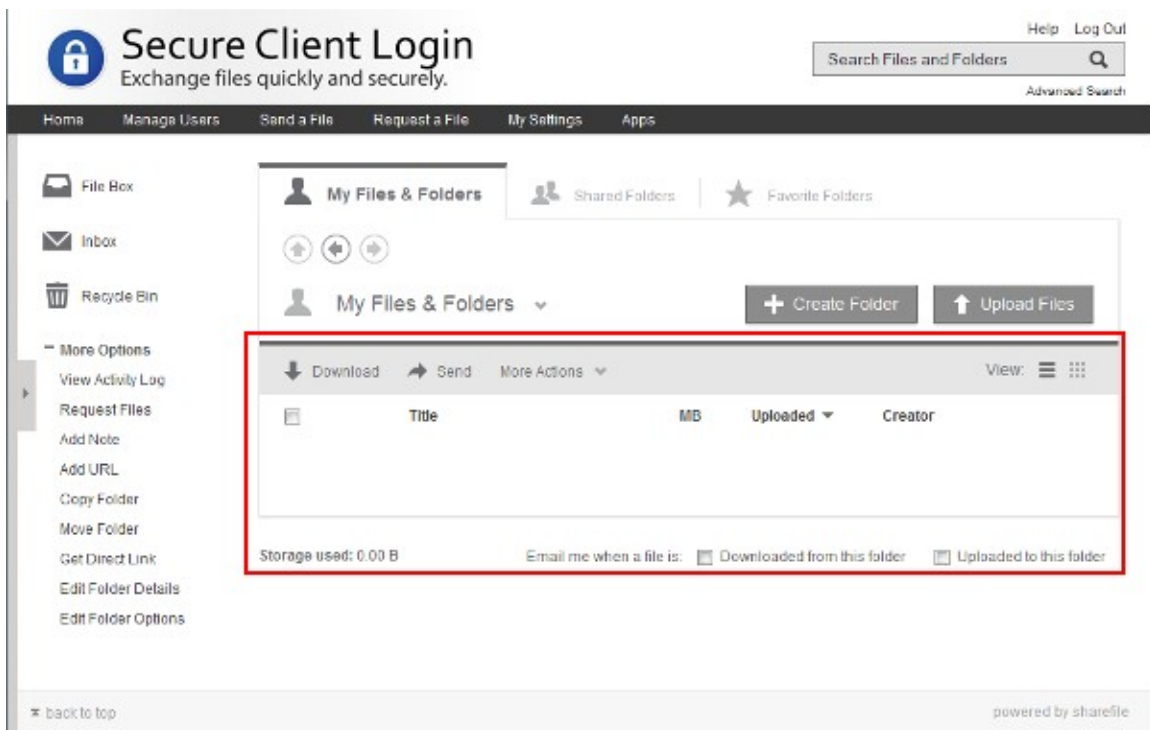
Displayed directly below the navigation buttons is the current folder name (“Title.”) Just to the right of the current folder name is a small 'down arrow.' Clicking the down arrow reveals a drop-down list of options you may select and apply to the current folder. **IMPORTANT!**: For descriptions of these options, refer to “Current Folder Drop-Down List” on page **XXXXX**.

'Create Folder' Button

Select this button to create a new folder under the current one.

'Upload Files' Button

Select this button to upload files to the current folder.



Current Folder - Bottom

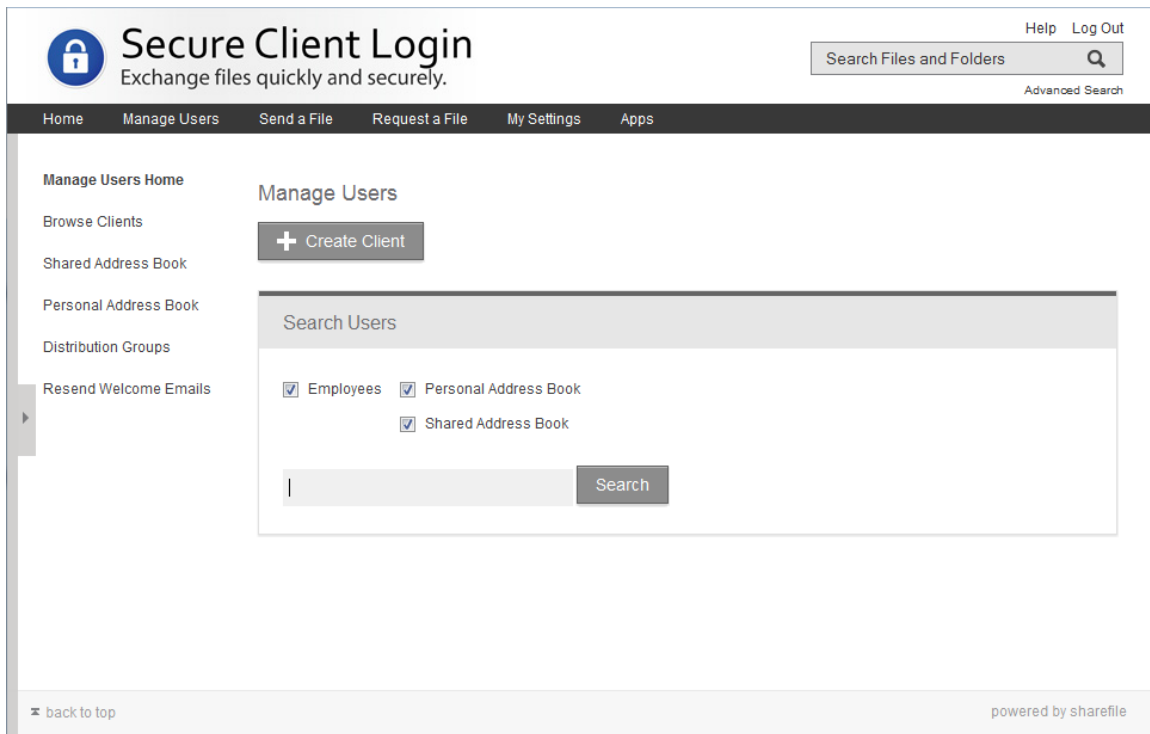
Actions & Views

Directly below the current folder name and '*Create Folder*' and '*Upload Files*' buttons is a gray horizontal region containing various actions and views. These are:

- 'Download' Download selected items to your desktop or device.
- 'Send' Send invitations to download selected items. “You can share files by including a hyperlink in an email message. The recipients don't need to be ShareFile users.”
- 'More Actions' This is a drop-down list: 'Edit', 'Move', 'Copy' or 'Delete' selected items. Notes: “Edit” in this context means you can change the name (“Title”) and description (“Details”) of the selected item. 'Items' are Files, Folders, Notes or URLs (links.)
- 'View:' Two views of the current folder contents are available, “as a list” or “as icons.” Click an icon to the right of “View:” to switch to that view.

Contents

Below 'Actions & Views' is where the contents of the current folder are displayed. Whether in “icon view” or “list view” mode, each item in the folder is accompanied by a 'select box.' Click the select box for each item that you wish to apply an action to. Click the 'Select All' box to select every item in the folder. Notes: In icon view, the 'Select All' box is clearly labeled. In list view, while not labeled, the 'Select All' box is uppermost in the column heading, alongside “Title”, “MB”, “Uploaded” (date) and “Creator.” Finally, below this area, is displayed “Storage Used” and convenience settings for e-mail notifications which apply to the current folder.



Manage Users

Manage Users Home

Clicking '*Manage Users Home*' returns you to the main '*Manage Users*' screen (depicted above.)

Browse Clients

Presents a list of clients, from both the shared and personal address books, for browsing.

Shared Address Book

Manage your portal's shared address book.

Personal Address Book

Manage your personal address book.

Distribution Groups

Create and manage distribution groups. Distribution groups allow you to issue bulk requests for files and to send bulk invitations to securely download files.

Resend Welcome Emails

Allows you to select one or more clients and re-send their Welcome E-mails.

'Create Client' Button

Click this button to begin the process of creating a new portal user account.

'Search' Button

As the name implies, enter search criteria (such as a first or last name) and click the '*Search*' button to search both your personal and the shared portal address books.



Send a File (Step 1 of 2)

With Send a File, you can share files by including a hyperlink in an email message. The recipients don't need to be ShareFile users.

Email Sending Options

- Send email using ShareFile
- Give me a link I can copy and send using my own email software

* Required

To: *

[Personal address book](#)
[Shared address book](#)
[Distribution groups](#)

Subject: *

Message:

Remember subject and custom message for next time

- Send me a copy of the email
- Require recipients to log in
- Email me when the file has been downloaded

Downloads per user:

[Cancel](#)

Send a File (Step 1 of 2)

*** According to Shannon at Abacus & Co. of NY, as a normal user, she is able to create folders and then grant access to them to users who don't exist yet by *creating* them! ***

User By default, 'All Users' is pre-selected in the "User" filter drop-down box at top-left (below "Activity Log" and "Filter Results.") You can select an individual user from the drop-down list to view only that user's activities.

Dates By default, logged activities are displayed from inception of the account to the current date. Change 'Start Date' and 'End Date' to view activities from a specific day or date range.

Activities By default, all logged activities are displayed. Select and deselect the checkboxes to display or hide individual types of activities. The following activities can be individually selected for viewing:

- | | |
|---|--|
| <input type="checkbox"/> Download/View | <input type="checkbox"/> Restore Files/Folders |
| <input type="checkbox"/> Upload | <input type="checkbox"/> Create Folders |
| <input type="checkbox"/> Delete Files/Folders | <input type="checkbox"/> Create Notes |
| <input type="checkbox"/> Edit Files/Folders | <input type="checkbox"/> Create URLs |
| <input type="checkbox"/> Move Files/Folders | |

File Box provides temporary storage. Content residing in *File Box* expires after 30 days. To store files for longer periods of time, select them and click 'Move' to move them to a permanent folder.

In practice, clicking on *File Box* causes the '- More Options > Request Files' link to disappear. There is no mechanism available to request files from users while you are in *File Box*.

In addition, it does not appear to be possible to ***move*** selected files or folders from other folders into *File Box*. '*File Box*,' as a destination, is absent from the folder tree view that appears when one clicks 'Copy Folder' or 'Move Folder' (details below.)

Therefore, the only mechanism available for placing files into *File Box* is to, first, click the '*File Box*' link (to enter the folder) and to then click the 'Upload Files' button.

File Box *does*, however, provide a 'Send' link, so invitations to download can be sent from there. Presumably, this method is for ad hoc 'sends', where the recipient has 30 days to retrieve the content before it automatically expires to the Recycle Bin.

Inbox

Files Sent To Me: Files sent to you by other users appear here.

Requested From Me: Requests for files, sent to you by other users, appear here.

The recycle bin allows you to restore items that you have deleted in the last 7 days. It also allows you to restore files to your *File Box* that have expired in the last 7 days.

Copy Folder

- Opens a tree view of your folders:
- The 'My Files & Folders' branch displays your complete folder structure.
- The 'Shared Folders' branch displays only those folders that you have shared with other users.
- The 'Favorite Folders' branch displays only those folders that you have tagged as 'favorites'
- Click the "+" sign to expand a branch
- Click the "-" sign to contract a branch
- Click a folder in the tree to duplicate the current folder under it. Note: "current folder" is the one you were viewing when you clicked the "Copy Folder" link.
- If a folder is listed in the tree view in red, the current one cannot be copied under it.

Move Folder

- Opens a tree view of your folders:
- The 'My Files & Folders' branch displays your complete folder structure.
- The 'Shared Folders' branch displays only those folders that you have shared with other users.
- The 'Favorite Folders' branch displays only those folders that you have tagged as 'favorites'
- Click the "+" sign to expand a branch
- Click the "-" sign to contract a branch
- Click a folder in the tree view to move the current folder under it. Note: "current folder" is the one you were viewing when you clicked the "Move Folder" link.
- If a folder is listed in the tree view in red, the current one cannot be moved there.

Edit Folder Details

Change the current folder's name ("title") and description ("details.")

Edit 'Title'; 'Title' = Folder Name; Use this function to rename a folder.

Edit 'Details' (i.e. each folder can have a 'description'; "Details" = "Description")

Edit Folder Options

- * Folder Expiration Date
- * File Retention Policy
- * File Versioning
- Sort Order
-

Desktop Apps

ShareFile desktop apps allow you to easily interact with your ShareFile account without having to log into the web application.

http://support.citrixonline.com/en_US/sharefile/all_files/SF020034

Mobile Apps

ShareFile mobile apps allow you to access your ShareFile files and features without having to be at a computer.

http://support.citrixonline.com/en_US/sharefile/all_files/SF160001

Folder Administration

Files within ShareFile can be organized within a folder structure in order to organize your files and manage permissions.

http://support.citrixonline.com/en_US/sharefile/all_files/SF040044

User Administration

ShareFile allows administrators to manage what their users have access to and what they are able to do on the ShareFile account.

http://support.citrixonline.com/en_US/sharefile/all_files/SF050029

Integrations

ShareFile integrates with several other programs for ease of use.

How to Put a Request a File Link in Your Email Signature

A Request a File link can be included in your email signature to save you from having to insert a link every time you send an email. This process makes it easy for clients to upload files quickly and simply.

ShareFile WebDAV Integration Into GoodReader

You can connect your GoodReader accounts to ShareFile through a WebDAV connection, allowing you to interact with the files and folders from your account in GoodReader via your iPad.

ShareFile WebDAV Integration into Mac Finder

You can connect your ShareFile account through WebDAV to Mac Finder (OS X 10.8). This will allow you to interact with the files and folders in your ShareFile account directly through Finder.

ShareFile WebDAV Integration into Windows Explorer

You can connect with your ShareFile account through WebDAV to Windows Explorer (Windows 7 and 8) and Microsoft Office (2012 and 2013).

ShareFile WebDAV Integration

You can connect with your ShareFile account through WebDAV to various various clients including GoodReader, Mac Finder, Windows Explorer, Microsoft Office, Pages, and WebDrive.

FTP Compatibility

ShareFile is compatible with most well-known FTP clients, enabling you and your clients to connect to your ShareFile account directly from an FTP program.

FTP Windows

ShareFile is compatible with most well-known FTP clients, enabling you and your clients to connect to your ShareFile account directly from FTP programs for Windows such as FileZilla, Ipswitch, Cute FTP, and others.

FTP Mac

ShareFile is compatible with most well-known FTP clients, enabling you and your clients to connect to your ShareFile account directly from FTP programs for Mac such as FileZilla and Cyberduck.

ShareFile and RightSignature Integration Best Practices

RightSignature integration allows you to send files for signature directly from your ShareFile account. ShareFile recommends a number of practices for users integrating RightSignature to their ShareFile account.

How to Connect Your RightSignature Account to ShareFile

ShareFile integrates with RightSignature, allowing you to send ShareFile files directly to RightSignature to collect signatures. You may integrate your RightSignature account with ShareFile under the Apps link in the ShareFile top navigation bar.

How to Use the ShareFile and RightSignature Integration

ShareFile integrates with RightSignature, allowing you to send ShareFile files directly to RightSignature to collect signatures. PDF, Microsoft Word, and plain text files are supported.

How to Unlink RightSignature from ShareFile

If you wish to disassociate your RightSignature account, you may do so under the Apps link of the top navigation bar, via the Other Apps tab.

ShareFile for SalesForce

Citrix ShareFile for Salesforce allows you to quickly and securely access and share your ShareFile documents and folders from within Salesforce. Streamline and simplify file sharing for your entire team, from any device, at any time.

Distribution Groups

ShareFile distribution groups allow you to manage and send files to multiple users at one time.

Sending or Receiving Files from a Distribution Group

Distribution groups allow a user to send files or folders to a specific predetermined set of users in their address book simultaneously.

How do I Add a Distribution Group to a Folder

A distribution group may be added to a folder in much the same way an individual user would be. Folder permissions can be customized across the distribution group.

What are Distribution Groups?

Distribution Groups allow employees to organize groups of users in order to efficiently add them to folders or send/receive files instead of having to add several users to a folder or as recipients on an outgoing Send or Request email individually.

How do I Create a Distribution Group?

Users can create and manage distribution groups under the Manager Users section of the top navigation bar via the Distribution Groups link in the sidebar.

How do I Edit a Distribution Group?

Users can add or remove members from a distribution group under the Manager Users section of the top navigation bar via the Distribution Groups link in the sidebar.

How do I Delete a Distribution Group?

Users can delete existing distribution groups under the Manager Users section of the top navigation bar via the Distribution Groups link in the sidebar.

Why Can't I Edit Another User's Distribution Group?

Distribution groups, when created by Employee users, can only be edited by the employee whom has created it or by an employee user that has the permission to Edit Shared Distribution Groups.