ShareFile

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What's new in ShareFile documentation

April 22, 2024

A goal of ShareFile is to deliver new features and product updates to ShareFile customers when available.

To you, the customer, this process is transparent. Initial updates are applied to ShareFile internal sites only, and are then applied to customer environments gradually. Delivering updates incrementally in waves helps to ensure product quality and to maximize the availability.

April 22, 2024

ShareFile AI-assisted secure share recommender

When a user creates a share link or shares a single file smaller than 20 MB, ShareFile will use AI to scan documents for **Personally Identifiable Information** (**PII**) data to automatically recommend secure share settings.

For more information, see AI-assisted secure share recommender.

April 16, 2024

ShareFile 24.4.2.0 for Outlook

This release addresses issues that improve overall performance including:

ShareFile share and request settings - Admins can set share and request link defaults across all ShareFile applications. For more information, see Secure sharing options.

For release information regarding fixed issues, see ShareFile for Outlook

April 2, 2024

ShareFile storage zones controller 5.11.25

This release includes general security and user improvements.

For more information, see About storage zones controller.

April 1, 2024

ShareFile Integrations

Using the ShareFile **Catalog** you can now add the ability to export from your ShareFile account to the following third-party applications:

- FreshBooks
- Pipedrive
- QuickBooks
- Salesforce
- Xero

For more information, see Integrations.

March 27, 2024

ShareFile 24.3.3 for Windows

This release addresses issues that improve overall performance and stability.

For more information, see ShareFile for Windows.

March 21, 2024

ShareFile HIPAA Support updates

HIPAA enabled ShareFile accounts now include several enhancements to assist your staff optimize collaboration processes and provide straightforward tools.

For more information see, HIPAA Support

March 8, 2024

ShareFile 24.2.12.0 for Outlook

This release addresses issues that improve overall performance and stability.

For more information, see ShareFile for Outlook.

March 1, 2024

ShareFile secure share and request management

ShareFile admins can manage the defaults for both sharing and requesting files. For more information, see:

- Share Settings
- Request Settings

February 28, 2024

ShareFile 24.2.2

This release addresses issues that improve overall performance including:

ShareFile share and request settings - Admins can set share and request link defaults across all ShareFile applications. For more information, see Secure sharing options.

February 21, 2024

ShareFile 24.2.2 for Windows

Added support for new ShareFile admin **Share** settings.

For more information, see Share settings.

February 20, 2024

Signatures

This release addresses issues that improve functionality by including the following enhancement:

- **Import fields** - save time by importing fields from previous signature request documets. For more information, see Import fields

ShareFile 24.2.10 for Outlook

February 16, 2024

ShareFile 24.2.10 for Outlook

This release addresses issues that improve overall performance including:

ShareFile share and request settings - Admins can set share and request link defaults across all ShareFile applications. For more information, see Secure sharing options.

For release information regarding fixed issues, see ShareFile for Outlook

February 15, 2024

ShareFile 24.2 for Mac

This release addresses issues that improve functionality by including the following enhancements:

Storage protection - ShareFile for Mac can detect storage overages and block uploads from occurring. For more information, see ShareFile Storage.

ShareFile share and request settings - Admins can set share and request link defaults across all ShareFile applications. For more information, see Secure sharing options.

Supported Language update - ShareFile has updated the supported language list. For more information see Supported languages.

ShareFile API

All public share links accessed through `api.sharefile.com` will require authentication.

For more information, see REST API Quick Start Guide.

February 9, 2024

ShareFile Managing Security Notifications

ShareFile now provides flexible email notifications for Security Alerts. ShareFile now enables Admins to efficiently route security-related email alerts to their organization's internal security team.

For more information, see Manage notifications.

February 6, 2024

Domain inclusion list

ShareFile added `*.harness.io` to the recommened inclusion list of domains.

For more information, see Firewall configuration.

February 5, 2024

Signatures

This release addresses issues that improve functionality by including the following enhancements:

- Use **Saved Signatures** in **Signature Annotations**.
- Align fields when preparing a signature request.
- Add, modify, or remove recipients from the signature requests details page.

> **Note:**
>
> These are only available in ShareFile Signature. For more information, see Signatures.

January 25, 2024

ShareFile for Windows 24.1.26

This release addresses issues that improve overall performance.

For more information, see ShareFile for Windows.

January 9, 2024

Signatures

This ShareFile release provides the bulk send enhancement that allows you to send multiple signers their own copy of a single document.

For more information, see Send in bulk.

December 20, 2023

Signatures

This ShareFile release provides three enhancements that improve the signature flow and abilities when requesting a signature. Select the links below to learn more about these new enhancements.

Revise a signature request - Users can now revise a Signature request that is In-Progress to make any necessary changes.

Using Payment fields - Signature users with **Stripe** integrated can use the new **Payment** field when setting up their signature requests.

Using checkbox groups - Checkbox groups allow you to create optional or required lists of items for the signer to acknowledge when completing a signature request. The flexibility with these checkboxes allow you to customize your signature requests and requirements for different recipients.

December 11, 2023

RightSignature

This release addresses issues that improve overall performance and include the following enhancement:

Signer document download - RightSignature admins can enable or disable the option for recipients to download a document before signing. For more information on using this new option, see Signer document download.

For more product information, see Electronic signature - Fixed issues.

ShareFile

As part of our on going Product improvements, we are in the process of updating our backend systems. This process should be seamless for our customers and new billing functionality might be introduced for your account.

Signatures This release also includes the following enhancement for our ShareFile Signatures users:

ShareFile signature users can now edit a new permission for recipients under Default settings that allow recipients to download a document before signing. For more information regarding this new setting, see Signer permissions.

Saving emails with ShareFile

ShareFile is excited to announce our new product enhancements for ShareFile for Google Workspace and ShareFile for Microsoft Outlook Online. You now have the ability to easily save emails with attachments directly to ShareFile. This enables you to organize, access, and share your email content effortlessly within the same platform you trust for secure file storage.

For more information see:

- Save Outlook Online emails with ShareFile

- Save Google Workspace emails with ShareFile

November 30, 2023

ShareFile Projects enhancements

Delete and restore Projects - Deleted projects are easily restored with the latest release.

Restore a deleted document request - Deleted document requests can be restored using the new **Restore** feature.

Delete and restore a file or files in a Project - Project files can be deleted and restored with the latest release.

November 6, 2023

ShareFile Threat detection alerts and remediation updates

This release includes enhancements to our threat detection and remediation features.

For more information, see ShareFile threat detection alerts.

ShareFile Projects enhancements

Projects dashboard - updated with the latest ShareFile branding.

Projects search and sort - Users can now search and sort Projects.

Projects user clean-up - Projects are now included in the Delete employee users process and will require reassignment when a Project owner is no longer available.

Document Requests - Project owners can change and add assignees to an active document request list.

Projects status - We now allow filtering based on the Project status of either Open or Closed.

RightSignature enhancement

This release includes an enhancement to RightSignature:

Editing signer name after request is sent - Senders can edit the signer name and email on a signature request.

November 1, 2023

ShareFile for Mac beta release

The beta release of ShareFile for Mac provides the following updates to the application:

- Co-editing a Microsoft Office file
- Add a place - allows ShareFile direct access to your Microsoft Office applications with your Mac.

Download ShareFile for Mac beta release to try these beta features.

For more information, see ShareFile for Mac.

October 31, 2023

ShareFile 23.10 for Mac

We have updated ShareFile for Mac to utilize our new brand in the application. This includes the following updated features:

- Redesigned experience for sharing and requesting files - following the latest secure sharing options implemented in our ShareFile web application, the ShareFile for Mac experience now offer a consistent experience.
- **Editable shares** - ShareFile for Mac now offers the ability to provide editable shares.

For more information, see Share files in ShareFile for Mac.

October 26, 2023

ShareFile managed cloud storage zone is available in the UAE region

A new ShareFile managed cloud storage zone is now available in the UAE region. If you are a customer located in the UAE region, reach out to ShareFile support to get the new storage zone enabled on your account.

For more information including the list of available ShareFile cloud storage zones see, ShareFile managed cloud storage zones.

October 23, 2023

New secure sharing options

We are taking steps to improve the security posture of file sharing. From now on all links default to use secure sharing options which will apply across all ShareFile locations: ShareFile desktop app for

Mac and Windows, ShareFile Web app, ShareFile Mobile app, ShareFile Plug-in for Microsoft Outlook and Gmail.

- The 'sign in required' option will be selected by default for all shares
- A new alert when you are about to share a link that can be viewed by anyone.
- Admins can require authentication for all share or request links for the account.

> **Note:**
>
> When selecting the "**Anyone (public, must enter a name and email)** option, the recipient is required to complete the **reCAPTCHA** request.
>
>

For more information, see our **Learn more** page for New secure sharing options.

October 12, 2023

ShareFile announces a new look and feel to show ShareFile's evolution into a complete solution

We've evolved our solution to go beyond secure document sharing. We're helping our customers embrace digital-first workflows that use automation, native e-signature, and best-in-class security. The

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efficiencies and cost savings created by these workflows allow our customers to focus on delivering a modern client experience.

At the core of our renewed brand identity is ease. We wanted to capture that feeling of checking off all the boxes from start to finish —without any roadblocks. Our new logo mark, for example, brings this feeling to life by using the iconic check mark, a sign of accomplishment.

From our brand colors to our 3D elements, ShareFile's new look and feel helps us tell the story of smooth processes and the resulting moments of energy and joy that make work meaningful.

To learn more about our evolution, see A modernized brand to take ShareFile into the future of work.

September 26, 2023

New ShareFile storage features

For net-new accounts created after **August 4, 2023**, ShareFile Admins will see a new dashboard for storage consumption on the account in addition to enforcement of storage limits. The following new features are available for net-new accounts.

Storage usage admin dashboard - is a new feature in ShareFile. Storage usage is an admin space that includes a dashboard where admins can view and perform the following:

- View the total storage used by the account through the indicator.
- Review how much storage is consumed out of the allocated storage.
- The date when the storage was updated.
- Get a list of top storage consumers in the account.
- Select and notify the users that are using more storage than needed.

Notifications on the ShareFile UI display the storage consumed by an account and what action must be taken to get the storage within the limit. ShareFile also sends emails to admins when an account reaches 90% and 100% of allocated storage.

Storage enforcement - If an account has consumed 100% of its storage and exceeds the total storage limit, the account actions are blocked, not allowing users of that account to upload files, create documents, add new data, request a file, or duplicate files. However, the users can log in to their account, view, and download.

For more information, see ShareFile storage.

September 25, 2023

ShareFile - Tenant Management

ShareFile allows partners to add new tenant accounts. The new automated provisioning provides more streamlined account management, easy tenant setup, and faster time to market.

For more information, see Tenant Management.

September 19, 2023

ShareFile signature enhancements

This release addresses issues that improve overall performance and include the following features:

Set to date of Signature - Enable this when sending for signature to autofill the date the document is signed. For more information, see Auto-fill date

Date Formats - ShareFile added five additional date format options. For more information on setting the date option in ShareFile, see Time and Date.

ShareFile VDR feature update

ShareFile VDR users can access the following new feature:

Threat detection alerts: Secure client data by getting notified of unusual access to ShareFile account via email.

September 14, 2023

ShareFile for Outlook Online

ShareFile is excited to announce the launch of our **ShareFile for Outlook Online** add-in.

ShareFile for Outlook Online is a feature app available for ShareFile Advanced and Premium customers when using Outlook Online.

To access the ShareFile for Outlook Online add-in, go to Microsoft AppSource. For more information, see ShareFile for Outlook Online.

September 11, 2023

New features now available in the EU control plane

ShareFile Premium subscribers under the EU control plane now have access to several new Premium features. For more information on each of these features, select the feature name:

- **Projects** - a new collaborative space in ShareFile to organize, digitize, and unify services with clients.

- **Document Requests** our new request list tool that digitizes, organizes, and streamlines document request and collection workflows, such as HR documents for hiring or collecting a list of financial documents.

- **Automated Workflows** - a new workflow builder in ShareFile that can be used to customize workflows based on specific actions and automation triggers.

- **Accelerated Agreements for Client Onboarding** - this ready-to-use workflow streamlines and automates client onboarding agreements, such NDAs, or other signature agreements commonly needed to begin services.

August 31, 2023

Citrix Files for Mobile

ShareFile is happy to announce Microsoft Office 365 co-editing abilities in Citrix Files for iOS and Citrix Files for Android. Advanced and Premium ShareFile users now have the following mobile abilities:

- Live co-editing abilities with multiple users
- View various types of Microsoft Office 365 online files
- Edit Microsoft 365 files online
- View offline files
- Create new Microsoft Office files to share with users

Citrix Files 2380 for Android   For more information on the new co-editing feature with Citrix Files for Android, see Co-editing using your Android device.

Citrix Files 2380 for iOS   For more information on the new co-editing feature with Citrix Files for iOS, see Co-editing using your iOS device.

August 14, 2023

ShareFile new and updated features

Tasks: Now you can easily track the status of tasks related to client matters, including whether they are in progress, completed, overdue, or yet to start. Utilize this new feature within our recently released Projects functionality.

Threat detection alerts: Secure client data by getting notified of unusual access to ShareFile account via email.

Integrations of prospective client data with Salesforce and QuickBooks.

Projects has added functionality with the above new Tasks feature.

Accelerated Agreements with auto-fill templates - now with built-in unlimited e-signature, and updated Project Creation to expedite tedious document preparation.

Automated workflows with new **Send an email** action - Personalized welcome emails are effortlessly sent to clients fostering better client relationships and trust, directly from an automated workflow.

ShareFile for Windows

Add a place - ShareFile for Windows users can now connect to native Microsoft applications for a full experience on their desktop tool and automatically save files back to ShareFile while editing or co-editing.

August 7, 2023

ShareFile 2023.8.7 for Mac

We are proud to announce the new ShareFile for Mac application. To download ShareFile for Mac, click here.

The new **ShareFile for Mac** release addresses issues that improve overall performance.

For more information, see ShareFile for Mac.

August 3, 2023

ShareFile Migration Tool v4.4.3.0

Download the latest version of the ShareFile Migration tool here.

See ShareFile Data Migration Tool for more information.

August 2, 2023

ShareFile for Google Workspace

This new ShareFile add-on is seamlessly integrated into your productivity tools and transforms collaboration, simplifies file sharing, and supercharges productivity.

Be notified whenever someone accesses a file or sends you a file so you are always aware of what is going and can take action. You can also set different security and access levels.

For end-user help including accessing and sign in, see User Guidance for ShareFile in Google Workspace

Access the ShareFile add-on by visiting the ShareFile add-on page.

August 1, 2023

ShareFile

ShareFile is happy to announce a major update to our ShareFile Projects feature:

Delete a project - ShareFile Premium customers now have the ability to delete the projects they create. For more information, see Delete Projects.

Clients can add other contributors to a project - ShareFile Project owners can now allow clients on their project to add other contributors from the client's organization. For more information, see Manage project users.

Project owners can add team members - ShareFile Project owners can add team members from their organization to assist with their project. For more information, see Manage project users.

July 20, 2023

ShareFile for Windows 23.7.10

This release addresses issues that improve overall performance.

For more information, see ShareFile for Windows.

July 11, 2023

ShareFile 23.7.3 for Outlook

This release addresses issues that improve overall performance.

To download the latest release, please see the ShareFile for Outlook downloads page.

For more information, see ShareFile for Outlook

Citrix Files 2370 for iOS

This release addresses issues that improve overall performance.

For more information, see Citrix Files for iOS.

July 10, 2023

ShareFile 23.7 for Windows

We are proud to announce the new ShareFile for Windows application. To download ShareFile for Windows, click here.

The new **ShareFile for Windows** release addresses issues that improve overall performance and include the following feature update:

New request files experience - this update offers more options for requesting files including enhanced link creation and definition and access for specific people while using ShareFile for Windows.

For more information, see ShareFile for Windows.

June 26, 2023

Citrix Files 2360 for Android

This release addresses issues that improve overall performance.

For more information, see Citrix Files for Android.

June 20, 2023

Citrix Files 2360 for iOS
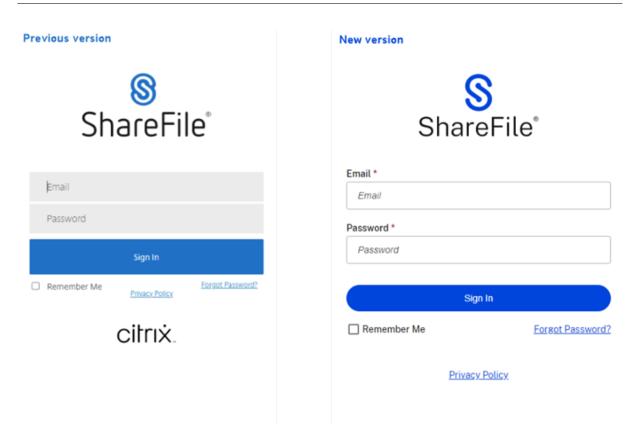
This release includes user improvements including an update to version 23.4.0 for MDX SDK.

For more information, see Citrix Files for iOS.

May 23, 2023

ShareFile

ShareFile is happy to announce our redesigned log-in and sign-on screens. We have improved accessibility and security along with a new modernized logo and fresh look and feel. No changes were made to the functionality.

Sign in to your ShareFile account, using your preferred method today, to see our new look.

May 22, 2023

Citrix Files 2355 for iOS

This release addresses issues that improve overall performance and includes the following new update to our sharing capabilities with iOS devices:

Improved sharing capabilities - this update includes more options for sharing, for link creation and definition, and access for specific people.

For more information, see Upload Files.

May 17, 2023

ShareFile announces the inclusion of *.sharefile.io

Add *.sharefile.io for future ShareFile feature releases and improved functionality.

For more information on who this might impact, see Firewall configuration.

May 11, 2023

Storage zones controller 5.11.24

This release includes security updates and fixed issues for ShareFile storage zone controllers.

For more information, see About storage zones controller.

May 4, 2023

ShareFile Virtual Data Room

ShareFile Virtual Data Room now allows customers to easily configure HIPAA compliance and protect sensitive documents that are stored or distributed during confidential transactions.

Also, during account sign up, customers can now select the EU control plane, which enables VDR to be utilized internationally while being EU compliant and following stringent guidelines like GDPR.

For more information, see ShareFile Virtual Data Room.

May 1, 2023

ShareFile

This release addresses issues that improve overall performance and includes the following new features:

Enhanced Accelerated Agreements for Client Onboarding - this update includes added functionalities for current clients and added capabilities for visibility and management of the workflow. For more information, see:

- Accelerated Agreements
- Create auto-fill agreement templates

Automated Workflows beta release - this new feature, for ShareFile Premium users, enables you to easily track and manage the progress of accelerated agreements. For more information, see:

- Automated Workflows

April 19, 2023

Citrix Files 23.4 for Windows

This release addresses issues that improve overall performance and includes the following updates:

Improved sharing capabilities - this update includes more options for sharing, for link creation and definition, and access for specific people.

Citrix Workspace integration is no longer available.

For more information, see Citrix Files for Windows.

April 17, 2023

ShareFile for Outlook

Citrix Files applications are changing their names to ShareFile. In this release, Citrix Files for Outlook is now **ShareFile for Outlook**.

Citrix Workspace integration is no longer available.

For more information, see ShareFile for Outlook

March 29, 2023

Citrix Files 2330 for iOS

This release addresses issues that improve overall performance and includes the following new update to our upload capabilities with iOS devices:

Upload Files - you can now upload files directly from your device to your ShareFile folders.

For more information, see Upload Files.

March 22, 2023

Citrix Files 23.3 for Mac

This release includes native support for **Apple Silicon** and addresses issues that improve overall performance and stability.

For more information, see Citrix Files for Mac.

February 22, 2023

ShareFile

This release addresses issues that improve overall performance and includes the following new update:

Improved sharing capabilities - this update includes more options for sharing, for link creation and definition, and access for specific people.

For more information, see Share files.

February 14, 2023

Citrix Files 2320 for Android

This release addresses issues that improve overall performance.

For more information, see Citrix Files for Android.

February 6, 2023

RightSignature

This release addresses issues that improve overall performance and include the following feature:

Decline to sign - signers can now decline to sign documents received from RightSignature accounts. For more information, see: RightSignature - Decline to sign.

For more product information, see Electronic signature - Fixed issues.

Citrix Files 2320 for XenMobile

This release addresses issues that improve overall performance including better file uploads from your iOS device.

For more information, see Citrix Files for iOS.

January 24, 2023

Citrix Files 2310 for iOS

This release addresses issues that improve overall performance and includes local file uploads from your iOS device.

For more information, see Citrix Files for iOS.

January 12, 2023

ShareFile 01-12-2023

This release addresses issues that improve overall performance and includes the following new feature:

Accelerated Agreements - This new feature for ShareFile Premium users improves their client onboarding process. This feature reduces onboarding cycle time.

For more information, see Accelerated Agreements - Client Onboarding.

Getting started with ShareFile

May 3, 2023

> **Notes:**
>
> - If starting with a Trial account, see Setting up a trial account.
>
> - If starting with an account representative, see Getting started with ShareFile - Account Representative

Get ShareFile

System requirements

ShareFile is accessible by any computer with a supported web browser and an internet connection. In order to utilize all features and functions of the ShareFile web application, we recommend the following browser types:

- **Microsoft Edge** - Latest version

- **Mozilla Firefox** - Latest version

- **Google Chrome** - Latest version

- **Apple Safari** - Latest version
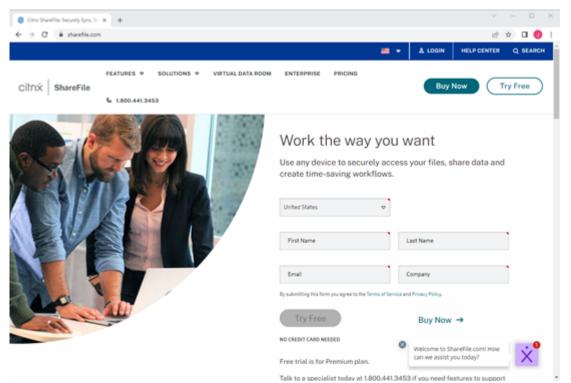
  > **Note:**
  >
  > Due to issues with displaying certain folders and menus, the ShareFile web application may not be accessible via Safari in **Private Browsing** mode.

Go to ShareFile.com
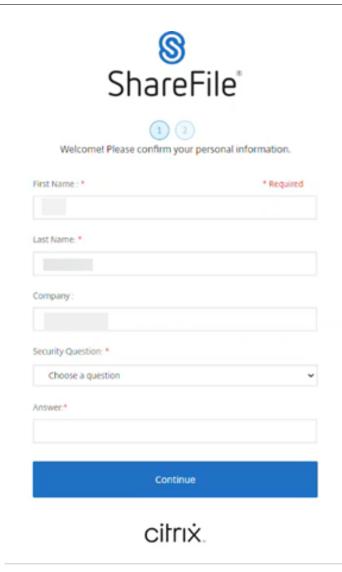
1. Type ShareFile.com in your supported browser.

2. Select **Buy Now**.

3. Select the ShareFile plan you want to purchase. For more information regarding plan features, see ShareFile pricing.

4. Select the plan you want, then **Buy Now**.

5. After you complete the checkout process, check your email for the activation message.

Signing in for the first time

1. In the email, select **Log in to ShareFile**.

2. Enter the requested information and select **Continue**.

3. Create your password then select **Save and Sign In**.

Your free ShareFile account is now available for a trial period.

Tips:

- To learn how to utilize two-step verification with your new ShareFile account, see Security
  - Two-step verification.
- For more information on ShareFile account configuration see Set up ShareFile.

Sign in on another device

1. Enter your company name.

2. Enter your sign on credentials.

ShareFile Auto-renew Policy

ShareFile accounts are set to auto-renew. To avoid being charged for an unwanted renewal, cancellation must be completed prior to the renewal date. Fore more information, see CSG TOS.

Setting up a trial account

June 18, 2022

Notes:

- If accessing ShareFile through a Citrix Cloud account, see Deploy under Citrix Content Collaboration for assistance.
- If you bought a ShareFile plan and are ready to sign in for the first time, see Getting started with ShareFile.

Starting a ShareFile trial

1. Go to ShareFile.com.

2. Select **Try Free**.
3. Create your account by entering the requested information.

4. Select **Try Free** to activate your new account.

5. Select **Save and Continue**.

An email from `mail@sf-notifications.com` is sent.

Signing in for the first time

1. In the email, select **Log in to ShareFile**.

2. Enter the requested information and select **Continue**.

3. Create your password then select **Save and Sign In**.

Your free ShareFile account is now available for a trial period.

Getting started with ShareFile - Account Representative

September 12, 2023

The following provides the steps necessary to complete the creation of your ShareFile account once you receive the confirmation email after speaking to your account representative.

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1. After receiving the email confirming your account, select **Create account** in the message.

2. On the **Welcome to ShareFile!** page, complete the following items:

   - Select a region for your account. Answer the Protective Health Information question. For more information, see ShareFile account creation - Region Learn More.

- Choose your subdomain. For more information, see Subdomain.
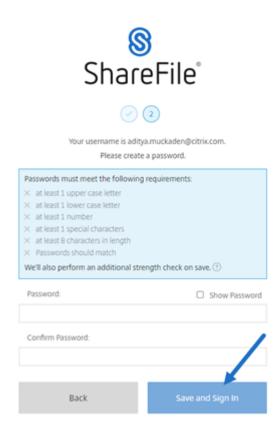
3. Select **Create Account**.

4. Complete the personal information screen, then select **Continue**.

5. Create your password using the requirements listed then select **Save and Sign In** to access your ShareFile dashboard. For more information on ShareFile account passwords, see Security.

The ShareFile dashboard displays.

ShareFile Auto-renew Policy
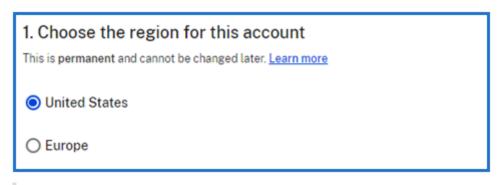
ShareFile accounts are set to auto-renew. To avoid being charged for an unwanted renewal, cancellation must be completed prior to the renewal date. For more information, see CSG TOS.

Account creation - Region learn more

April 1, 2024

Choose the region for your account

Notes:

- Once you select a region, it is permanent and cannot be changed.
- Consider performance optimizations when choosing your region.
- Storage is provisioned to the closest GEO based on the region selected.

By selecting either region, you are selecting the following:

- You choose to have your top level domain as **.com** or **.eu**.

- You choose to have your data stored in either the United States (default) or in Europe.

ShareFile

Do you plan to store or maintain Protected Health Information (PHI) in this service?

Selecting **Yes** to this will create a ShareFile HIPAA account. To have a HIPPA account you must have a Premium ShareFile account.

Account creation - Subdomain learn more

December 5, 2022

Choose your subdomain

Each ShareFile account has its own unique URL that is generally in the format of `https://yourcompanyname.sharefile.com`. The section of this URL with **mycompany** in it is called the subdomain, and it will always be followed with **.sharefile.com** or a plan-specific variant. The creator of the ShareFile account picks the subdomain during the account setup process, and a single account can have up to three different subdomains tied to it.

Select **Check Availability** to verify your selected name is available to use.

Log Locations for ShareFile Applications

August 21, 2023

Application	Log Location	Shortcut
ShareFile	`C:\Users\\%USERNAME%\AppData\Local\sharefile\sharefile\Logs`	
ShareFile for Mac	`~/Library/Logs/com.sharefile.desktop.widget`	
ShareFile for Outlook	**Tool logs:** `C:\Users\\%USERNAME%\AppData\Roaming\ShareFile\ShareFile for Outlook`	`%Appdata%\ShareFile\ShareFile for Outlook`
	adx logs: `C:\Users\\%USERNAME%\AppData\Local\Temp\ShareFile for Outlook`	`%temp%\ShareFile for Outlook`
Storage zones controller logs	`C:\inetpub\wwwroot\Citrix\StorageCenter\SC\logs`	
	`C:\inetpub\wwwroot\Citrix\StorageCenter\S3Uploader`	
	IIS Logs: `C:\inetpub\logs\LogFiles\W3SVC1`	
User Management Tool (UMT)	`C:\ProgramData\Citrix\ShareFile\User Management Tool` (Grab the umt.log file / and the .results file in the "Results" folder)	

Application	Log Location	Shortcut
	`C:\Users\\%USERNAME%\ AppData\Local\ ShareFile\UMT\Logs`	
	`C:\ProgramData\Citrix \ShareFile\User Management Tool\Jobs`	
ShareFile Migration Tool	`C:\Users\\%USERNAME%\ AppData\Roaming\ Citrix\Citrix Files\ Migration Tool\Logs`	`%appdata%\ Roaming\ Citrix\Citrix Files\ Migration Tool\LogsN`

Learn more - Secure sharing options

February 29, 2024

We're taking steps to improve the security posture of file sharing. From now on all links default to use secure sharing options that apply across all ShareFile locations: ShareFile desktop app for Mac and Windows, ShareFile Web app, ShareFile Mobile app, ShareFile for Microsoft Outlook, and ShareFile for Google Workspace.

- Default share permissions update - The 'sign in required' option is selected by default.
- Link share alert message - A new alert when you're about to share a link that is viewable by all.
- Admins required authentication for all share or request links for the account

Default share permissions update

The default share permission is changing to "employee and client users sign-in" for every new link shared. The default share makes it easier for users to understand the access permissions of the shared links they're creating.

We're updating the default settings for shares to help you stay secure. Anytime you share a file, it starts with the secure option. You can change the view and download permissions if you don't require security or privacy for that file.

Link share alert message

We've added a message alerting users when they share a link that can be viewed by anyone. This alert ensures that the user is aware that using links anyone can view isn't secured. These links are used for data that they're comfortable sharing publicly.

The following message appears when "anyone"is elected for "who can access this link":

- Allow recipients to view -> "Creates a link that allows anyone to view what you're sharing without signing in"

- Allow recipients to download - > "Creates a link that allows anyone to download what you're sharing without signing in"

Note:

When selecting the "**Anyone (public, must enter a name and email)** option, the recipient is required to complete the **reCAPTCHA** request.

After the link is created, a notation will remain next to the notating the view or download permissions:

- `Anyone can view without signing in`

- `Anyone can download without signing in`

Note:

ShareFile admins can manage the defaults for both sharing and requesting files. For more information, see:

- Share Settings

- Request Settings

ShareFile employee client permissions table

October 27, 2023

ShareFile

Permission	Employee	Client
Create Root Level Folders	Y	N
Share and Request Files*	Y	N
Be Folder Admin	Y	Y
Own Personal Folders	Y	N
Own File Box	Y	N
Access Personal Settings	Y	Y
Access Advanced and FTP Connection Settings*	Y	Y
Be granted Admin Permissions	Y	N
Be granted Super User role	Y	N
Create employee users and manage permissions	Y	N
Create client users*	Y	N
Access Inbox for Received Messages	Y	Y
Access Inbox for Sent Messages	Y	N
Create distribution groups	Y	N
Edit Shared Address Book	Y	N
Modify Account Appearance	Y	N
Run Reports	Y	N
Create or access Connectors	Y	N
Configure single-sign on settings	Y	N
Send Encrypted Email	Y	N
Edit Document*	Y	Y
ShareFile for Outlook*	Y	N
Citrix Files for Windows	Y	Y
Citrix Files for iOS	Y	Y
Citrix Files for Android	Y	Y
Mobile Editing	Y	Y

Permission	Employee	Client
Send document for e-signature*	Y	N
Manage e-signature templates*	Y	N
Manage folder templates	Y	N
View notification history	Y	N

*Some permissions can be enabled or disabled depending on the account's configuration, plan, or available settings.

Configure ShareFile

March 14, 2024

After you create or link your ShareFile account, perform the following tasks:

1. Provision administrators.
2. Provision users.
3. Import Active Directory users into ShareFile.
4. Configure authentication.

Provisioning Administrators

The first thing you need to do is provision administrators. When your account was created, it was provisioned with an account owner. In addition to this administrator, you can provision additional administrators.

Provisioning Users

To begin using your new ShareFile account, you must add users and configure authentication. To provide a seamless experience to your end users, you use SAML to authenticate against your Active Directory user accounts.

Importing Active Directory Users into ShareFile

The ShareFile User Management Tool (UMT) makes it easy for you to add your Active Directory users into ShareFile. You can use the tool to provision user accounts and create distribution groups from Active Directory (AD).

Importing users from Active Directory can take some time and be resource intensive. To help with this, you can schedule the tool to run at selected times. In addition to the initial import, you can also use the tool to keep your ShareFile users synchronized with your AD users.

For more information about the UMT, see User Management Tool for Policy-Based Administration.

Configuring Authentication

After you have imported your users in to ShareFile, you must configure authentication. When using the Citrix Cloud environment, you want to use SSO. SSO is done using the SAML protocol. In this environment you have two options for configuring SAML –either using ADFS or via Endpoint Management SAML authorization.

Configuring Authentication with ADFS

You can integrate your ShareFile account with Active Directory (AD) to enable single sign-on for users with AD credentials. ShareFile supports Security Assertion Markup Language (SAML) for single sign-on. You configure ShareFile to communicate with a SAML-based federation tool running in your network. User logon requests are then redirected to Active Directory. You can use the same SAML Identity Provider that you use for other web applications. For more information, see ShareFile Single Sign-On SSO.

Configuring Authentication to your Active Directory with Endpoint Management

You can configure Endpoint Management and Citrix Gateway to function as a SAML identity provider for ShareFile. In this configuration, a user logging on to ShareFile using a web browser or other ShareFile clients is redirected to the Endpoint Management environment for user authentication. After successful authentication by Endpoint Management, the user receives a SAML token that is valid for logon to their ShareFile account.

Accessing ShareFile

Now that you have configured your users and authentication, review how ShareFile will be accessed. There are two specific types of access you need to look at: administrator access and user access.

Administrator Access

As administrator, you may need to make changes to your ShareFile configuration or manage your account.

User Access

There are three options on how users access their data in ShareFile. Data can be accessed directly using the Web UI. The other two options depend on what other applications you have enabled. If you have Citrix Virtual Apps and Desktops or Endpoint Management enabled, users can access their data through one of those applications.

Accessing ShareFile through the Web UI   End users can access ShareFile directly by going to `http://YourSubdomain.sharefile.com`.

Admin overview

March 4, 2024

The Admin Overview page gives summarized information on your account using both **Account Summary** and **Storage Usage**. A View release notes link to What's new in ShareFile documentation is provided at the bottom of the page.

Account Information

The account information section provides the following details: Account Name, Account ID, Plan Type, Account Owner, and Allocated User Licenses. The page also displays any entitlements on your account.

Account owner

This is an administrator whose skills and experience allow for greater permissions and who maintains all user permissions available on the account. It cannot be deleted by any other user. If an account feature is added to the account, the account owner automatically has access to the feature. Any other users must be granted access as desired by the account owner.

All subsequent access to the customer's account is managed by the account owner or administrators designated by the account owner.

Identifying the account owner To identify the current account owner, go to **People** > **Browse Employees**. The account owner has a special icon to the right of their name.
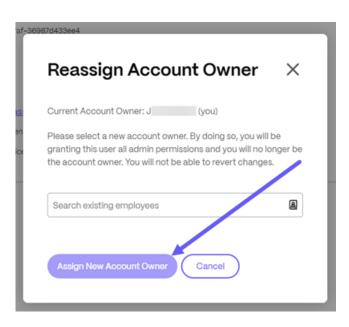
The account owner is also indicated on the **Manage > Account Information** page.

Changing the account owner The current account owner can use the **Reassign account owner** option to designate a new account owner. Use the following steps to complete this task.

1. To change the account owner for an account, the current account owner must sign in and navigate to **Settings** > **Admin Settings** > **Account Information**.

2. Select **Reassign Account Owner**.

3. Use "Search existing employees" to locate the new account owner then select **Assign New Account Owner**.

Notes:

- The new account owner must be an employee user on the account, and that employee user must have signed in at least once.

- The **Reassign account owner** option is only available to the current account owner.

If the current account owner is not available to place this request, contact ShareFile Support.

Storage　The **Storage** indicator shows the storage utilized (xxGB out of XXTB) and the date when storage was updated.

Company Information

The company information section provides the following details: Company name, Phone number, Industry, Address, Website, Fax Number and Number of Employees. On top of that, this section includes the contact information for the company key contacts.

- **Billing Contacts** - These contacts may receive billing related communications from ShareFile.

- **Security Contacts** - These contacts may receive security related communications from Share-File

IMPORTANT

Please ensure that **Billing Contacts** and **Security Contacts** are updated properly to avoid missing important communications from ShareFile.

Company Account Info

August 15, 2023

Reporting

Use ShareFile Reports to see how the account is being used by creating recurring and non-recurring reports that track usage, access, messaging, storage, and other details. For more information on using reports, see ShareFile Reports.
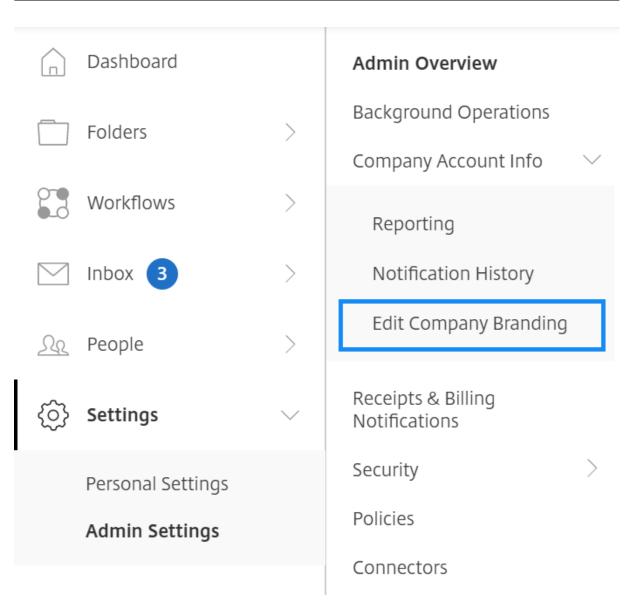
Company Branding

Your account's account or company name allows ShareFile support staff to identify your account. It is also the name that appears on any billing-related correspondences. Typically, your account name is the same as the name of your business.

Set up company branding

Use the following instructions to set up your company branding.

1. Navigate to **Settings** > **Admin Settings** > **Company Account Info** > **Edit Company Branding**.

The Edit Company Branding page displays.

1. Under **Acount Name**, type the name of the account.

2. With **Edit Account Appearance** in **Basic Options** you can perform the following actions:

- Change the **Page Title** that appears at the top of the window.

- Upload your company logo.

- Change the **Head Background Color**.

- Change the **Accent Color**.

> **NOTE:**
>
> By default, the **Basic** options page uses the page title, logo, header background color and accent colors that you selected. To customize the appearance use the **advanced appearance options** link on the page to expand the available options. For more information, see Edit Account Appearance.

3. Select **Save** at the bottom of the page to save your branding page changes.

Edit Account Appearance

The following options are set by the users who have the **Edit Account Appearance** permission set. These are optional.

- **Browser Options** - allows you to edit the page title, and favicon in the account appearance.

- **Header Options** - allows you to edit the logo, background image, and background color in the account appearance.

  > **Notes:**
  >
  > – The logo image must be no taller than 80px and no wider than 400px
  > – The background image can be any size, but only display the first 80 vertical pixels and will tile/repeat horizontally and vertically.

> – The default background color is white but any HTML color code can be used. If both a
> color and an image are entered, the image displays, and not the color.

- **Page Options** - allows you to set the accent bar color at the top of the tabs and in the content boxes.
- **Login Page Options** - Allows you to upload a logo, select a logo background color, a background color, upload a background image, and provide a description of your page.
- **Email Options** - Allows you to upload a logo, provide a header description and provide a footer description.

When all of your advanced options are completed, select **Save** at the bottom of the page.

Edit Subdomains

With your ShareFile account, you are allowed up to three subdomains. All of these subdomains share the same custom branding for your company account.

The following requirements are necessary to create subdomains:

- Contain only letters, numbers, and hyphens.
- Does not start with a hyphen.
- Is at least 2 characters long.

Once you have added the subdomains, select **Save** at the bottom of the page.

ShareFile Reporting

February 26, 2024

To see how your ShareFile account is being used, you can create recurring and non-recurring reports that track usage, access, messaging, storage, and other details.

Limitations

- All recurring reports are run based on Eastern Standard Time.
- ShareFile does not provide or support customized reports.

Prerequisites

- An Administrative user on the ShareFile account.
- An Employee user with the **Allow this user to access account-wide reporting** permission.
- If running a report for a specific user, that user must be a member of the Shared Address Book.

Report types

Select the **Report** name for more information.

- Usage

- Access

- Access Change

- Storage Detail

- Storage Summary

- Share

- Request

- Users

- Bandwidth Detail

- Bandwidth Summary

- Messaging
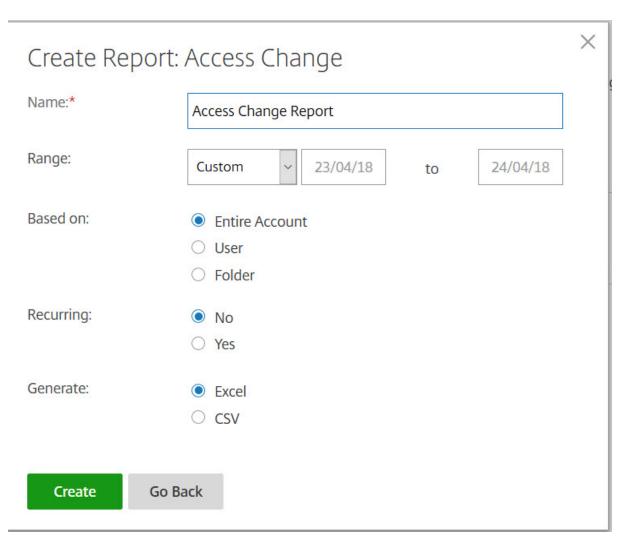
Create report

Complete the following steps to create a ShareFile report:

1. Sign into ShareFile.

2. Navigate to **Settings > Admin Settings > Company Account Info > Reporting**.

3. Select the **Create Report** button and choose the type of report you want to run, then click **Next**.
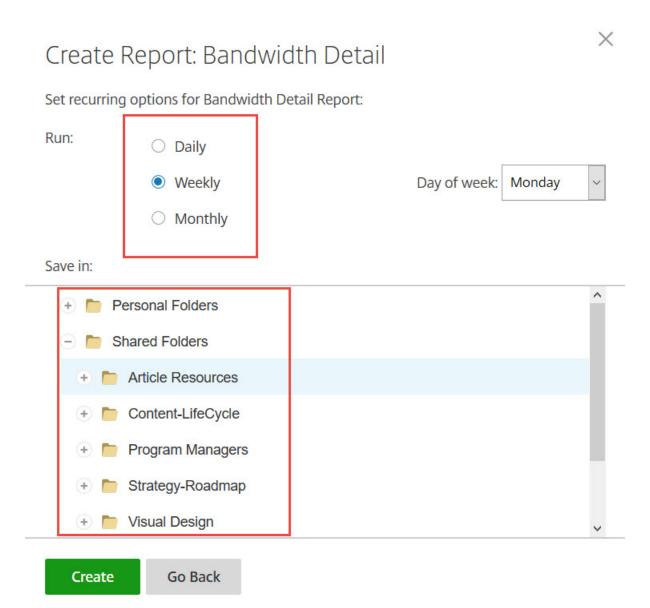
Create Report

See examples ✕

Usage
Review activity based on account, folder, or user.

Access
Review access and permissions for account, user or folder.

Access Change
Review who added/edited/removed a user from a folder.

Storage Detail
Review files stored in your account.

Storage Summary
Review StorageZone data for the account or user.

Share
Get a detailed breakdown of who are sharing what files.

Request
Get a detailed breakdown of who are requesting what files.

Users
Get a detailed report showing all users on my account.

Bandwidth Detail
Get a detailed breakdown of your bandwidth use.

Bandwidth Summary
Get an overview of your bandwidth usage.

Messaging
Review your outgoing account messages.

Next   Cancel

1. Fill in the details as required and click **Create**. Reports can be generated as Excel or CSV files.

Recurring report:

To create a recurring report, follow the earlier steps through Step 3. Then, choose Recurring as **Yes**,
fill in the other details as required and click **Next**.
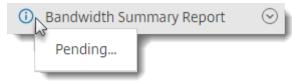
Choose **Daily**, **Weekly**, or **Monthly** based on your needs. Choose the folder where you want the recurring reports to be saved on your account and click **Create**.

Do not remove the destination folder from the system. If you do, future recurring reports might fail.

Report Pending:

Allow time for your report to be processed and completed. Depending on the amount of time and the final size of your report, the time it takes for the report to finish might vary.

View Completed Report:

You can view, download, move, or delete reports at any time by returning to the **Reporting** menu and accessing the list to the right of the Report Title.

> **Note:**
>
> Reports cover the account lifetime but can only be run in 90 day increments.

Notification History

The **Notification History** page contains a history of all email messages that have been sent from your account. You can select a date or a specific email with the options shown.

Billing

April 4, 2024

The **Billing** page allows you to view receipts, edit billing information, and other related activities.

In your ShareFile account, navigate to **Settings** > **Admin Settings** > **Billing** to access:

- Receipts & Billing Notifications
- Edit Billing Info

Receipts & Billing Notifications

Use the **Receipts & Billing Notifications** page to view and download to print your invoices for your ShareFile account.

You can select **Pay Now** to pay your invoice. See Pay Now for more information.

To download an invoice, select the download icon next to the month you want to review or print. A PDF is downloaded to your device.

Pay Now

Pay Now allows you to make a one time payment using a credit card to pay your invoice.

Use the following steps to pay your account from the **Receipts & Billing Notifications** page.

1. Select **Pay Now** from the **Receipts & Billing Notifications** page.

The **Enter Card Details** pop-up displays.

2. Enter the requested information.

3. Select **Continue** to make the one-time credit card payment.

To pay all future invoices with a credit card, see Edit Billing Information for more information.

Edit Billing Information

The **Edit Billing Information** screen allows you to update your billing type from invoice billing to credit card. You can also make changes to your billing address.

Update Billing Type

Use the **Update Billing Type** to make a change to how your ShareFile bill is paid.

1. Navigate to From ShareFile, navigate to **Settings** > **Admin Settings** > **Billing** > **Edit Billing Info**.

2. In the **Update Billing Type** section, select **Switch to Credit Card**.

   The **Update Billing Type** screen displays.

3. Select **Enter Card Details**.

   The **Enter Card Details** pop-up displays.

4. Select **Continue** to go back to the **Edit billing information** screen to receive confirmation of the change.

Update Billing Address

Use the **Update Billing Address** to make changes to your billing address.

1. Navigate to From ShareFile, navigate to **Settings** > **Admin Settings** > **Billing** > **Edit Billing Info**.

2. In the **Update Billing Address** section, select enter the new billing address information.

3. Select **Save**.

Cancel account

How to cancel your account

Use the following directions to cancel your ShareFile account.

1. In ShareFile, navigate **Settings** > **Admin Settings** > **Billing**.

2. Under **Billing** select **Cancel Account**.

   The Cancel Account verification screen displays.

3. Verify you want to cancel by selecting **Continue Cancellation**.

Notes:

* Cancelling the account requires an Employee user with the request plan changes permission.

* ShareFile accounts are set to auto renew. To avoid being charged for an unwanted renewal, cancellation must be completed prior to the renewal date.

* Once cancelled, Admins and Clients can login for 30 days; afterwards, only the account owner can login to reactivate the account.

Security

April 4, 2024

Password requirements

You can control password requirements for users here. By default, all passwords must contain at least 8 characters, containing at least 1 number, 1 upper case letter, and 1 lower case letter.

To create other password requirements for your users, fill out the form on this page. Any changes you make go into effect the next time a user changes their password.

For all users, passwords:

- Must contain a minimum of 8 characters with a maximum number of 50 characters.
- Must contain 1 upper case and 1 lower case letter.
- Must contain at least 1 number.
- Must contain at least 1 of these special characters: ! # $ % ^ & * ( )‐ _ + = / . ? \ [ ] | '~ @ '
- Can't be the same as their last 25 passwords.

Forced Password Reset

In response to an increase in internet-account credential (user name and password) theft, ShareFile might require a password reset and will continue to incorporate a regularly scheduled forced password reset into our normal operating procedures.

Login and security policy

Trusted domains

You can enter one or more domains to allow iframe embedding and Cross-Origin Resource Sharing (CORS).

Two-step verification

Two-step verification uses your phone to provide an extra layer of security for your user name. After you sign in, you're asked to enter a verification code that is sent to your phone using a text message (SMS) or voice call. Supported Authenticator apps like Google and Microsoft can be used as an option instead of your usual password.

> **Notes:**
>
> - Two-step verification is enforced for all employee users in all ShareFile accounts.
> - Admins who prefer to disable the two-step verification enforcement for employee users can opt out of this enforcement by selecting **Complete Opt-Out Waiver** on the **Two-step verification** pop-up. This disables the enforcement, however, employee users are able to enable it for themselves to improve the security of their account.
> - Client users can use two-step verification even if the admin did not enforce the use of the

> feature.

This feature is available to both Client and Employee users. Two-step verification is supported on iOS and Android mobile devices.

Some apps require an app-specific password that must be generated each time you want to sign in to the app.

Account lock-out configuration

This allows you to select the number of times a user can enter an invalid password before being locked out of the account for a specific time period of your choosing.

Terms and conditions

Terms and conditions can be added to the sign-in page for customers. We recommend that single sign-on customers also implement the terms and conditions on their sign-in page for full coverage. You have the option of including customizable terms and conditions that must be accepted to indicate compliance with the terms before entering the account. Contact ShareFile Support for assistance with adding terms to your sign-in page.

Users with the **Admin Account Policies** permission can request Terms and Conditions to be added.

IP restrictions

Use IP restrictions to restrict where your users can sign in to your account. contact ShareFile Support to set IP restrictions.

Authentication

Inactive users can be signed out of the account after a chosen duration of inactivity. By default, this duration is set to 1 hour.

OAuth tokens are used by apps and the API to authenticate. After the period selected here, users will be required to reauthenticate with all apps. If set to **Never**, OAuth tokens can still be manually expired through **My Connections** under **Personal Settings**, or by an administrator on the user's profile page using the **Users** menu.

Limitations

- This feature isn't available for trial accounts.
- This feature can't be used with company credentials or a custom sign-in page.

Two-step verification

Two-step verification is enabled.

Two-step verification allows users to setup a phone number to receive a code via SMS or Voice. It also allows users to setup an authenticator app. Users can enroll a verification method in their Personal Settings.

Two-step verification is required by default for all employee users, if you would like to opt-out of this setting you can fill out a waiver, then change the setting and click save.

Complete Opt-Out Waiver

Require two-step verification

☑ Employee users
☐ Client users

Require two-step verification requires that the user group enrolls and opts in for two-step verification. When enabled, the setting is enabled for all Employee Users or Client Users or both. By default, it is required for all employee users on all ShareFile accounts.

For new users, the activation process requires that the user enter a phone number that is enabled for text message (SMS) or voice. For existing users, the user is prompted to enter the phone number that is enabled for text message (SMS) or voice on the next sign-in from the web, desktop, or mobile app.

Device security

You can use these options to control the security level for devices used to access the ShareFile account by other users. These settings override any individual user preferences.

Modifiable device security settings include:

File self destruct - Determines the number of days without the user logging in or accessing the account before the account is automatically removed from the mobile device. Self-Destruct occurs even if the user is offline. Options are: Never, 1, 3, 7, 14, 30, 45, or 60 days. When `self-destruct` is triggered on a device, users with mobile push notifications enabled might receive a notification referencing a *Poison Pill* activation.

Require user passcode - Controls whether users are required to enter a 4-digit PIN or a password to access their content. When set, all content is encrypted. Options are: PIN, Password, or User-Selected Passcode.

Enable external applications - Determines whether users can open downloaded files outside of the ShareFile application.

Enable offline access to files - Controls whether users can see ShareFile content when the device is offline.

Restrict modified devices - Enabling this restricts users from being able to use ShareFile on a jail-broken device. ShareFile can't fully troubleshoot issues encountered by users that have chosen to jailbreak their device.

Enable automatic login - Determines whether users can opt to save their password on their device.

Device security presets

You can configure each setting individually at the **Configure Device Security** menu. In addition to a Custom setting option, ShareFile offers several presets with various differences.

- Standard
- Secure
- Online Only
- Custom

Super user group

Administrators, also known as super users, are automatically added to all new and existing folders on a given ShareFile account. Super users permissions include upload, download, delete, and administrator ability on all folders. Super-user group access to a folder can't be modified or removed in the folder access menu. This feature is enabled on your account by default.

Manage a super user group

Management of super users requires the **Manage Super User Group** membership permission.

1. Go to **Manage > Security > Edit Super User Group**.
2. To add a user, click **Add New User**.
3. Select a user from the menu from the list of employees on your account.
4. Use the checkboxes to select the users you want to add. Click *Add**.
5. Click **Save**.

You can also remove all users from the super user group. The group can be edited by any employee user with the **Allow this user to manage Super User Group** admin permission. Super users appear

in the **Folder Access** section on each folder. Admin users can choose not to display the group in the access list.

To hide super users from the **Folder Access** section, go to **Manage > Security > Edit Super User Group**, then select the **Hide Super Group from Folder Access List** checkbox.

Download or upload alerts can be enabled for the super user group in the folder access menu on a folder-by-folder basis.

Single sign-on (SSO)

Single sign-on (SSO) can be configured using various IdPs and certain SAML 2.0 or 3.0-based federation tools using basic, integrated, or forms authentication. This feature is available for Business and Enterprise plans.

Supported configurations

The following configurations have been tested and are supported for most environments.

- Citrix Endpoint Management
- ADFS 3.0
- ADFS 4.0 (Windows Server 2016)
- Dual IdP - ADFS and Citrix Endpoint Management
- Citrix Gateway
- Microsoft Entra ID (Azure AD)

More configurations

These configurations have been successfully configured and tested by our engineering teams. The following configuration documentation is subject to change due to continued product enhancements and improvements. The following configuration guides are presented as is:

- Centrify/Idaptive
- G Suite for Business
- Okta
- Ping-Federate
- PingOne / PingID
- OneLogin

> **Note:**
>
> ShareFile no longer supports custom logout URLs for the SAML configuration. All users will be
> directed to the ShareFile authentication service's logout page when they sign out. Some of the
> above configuration guides may still provide a logout URL, but are no longer necessary.

Data loss prevention

ShareFile integrates with third-party Data Loss Prevention (DLP) systems to identify files that contain
sensitive information. To limit access and sharing of items based their content, enable DLP scanning
on your storage zone controller and then configure the settings on this page.

Enable the **Limit access to files based on their content** setting if you have one or more private stor-
age zones configured to use a third-party DLP system to scan and classify documents. With this setting
enabled, sharing and access filters are applied to documents based on the results of the DLP scan. Use
the settings on this page to define the sharing and access filters for each classification.

- **Unscanned documents** - Allow these actions for documents that your DLP system hasn't
  scanned. This includes all documents stored in ShareFile-managed storage zones or other
  storage zones where DLP isn't enabled.
- **Scanned: OK** - Allow these actions for documents that your DLP system allowed.
- **Scanned: Rejected** - Allow these actions for documents that your DLP system rejected because
  they contain sensitive data.

For more information on Data Loss Prevention, see Data Loss Prevention.

Connectors

January 30, 2024
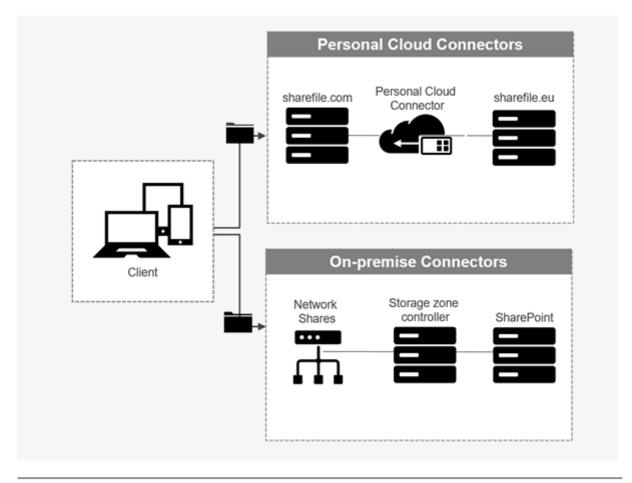
Connectors overview

Connectors allow employees to access files and folders stored on a connected on-premises or cloud-
based resource. Users can use the web application and ShareFile apps to view and interact with data
stored in connected locations.

> **NOTE:**
>
> ShareFile is decoupling accounts from Citrix Cloud and Workspace. **Files** integration is disabled
> from Citrix Workspace. Users can download, upload, move, copy, and delete data from within

the ShareFile web application. For more information see, Decouple your ShareFile account from your Citrix Workspace.

Connector type	Description	Supported services
ShareFile Cloud Connectors	Allows ShareFile account users access to personal cloud-based data storage services within ShareFile apps. Users can download, upload, move, copy, and delete data within these connected resources. These connectors require each user to authenticate with their service credentials. Users must and allow the ShareFile service to communicate with the permitted cloud-based service.	Office 365, OneDrive for Business, SharePoint Online, Dropbox, Box, OneDrive, Google Drive

Connector type	Description	Supported services
On-premises Connectors	On-premises connectors allow users to access data locations within Network file shares or as SharePoint sites. These connectors require an additional configuration of storage zone controller in a local environment.	SharePoint sites, collections, libraries, Network file shares, Documentum Connector

Supported apps

App type	Supported
Web app	Latest version
Mobile apps	iOS, Android, Universal Windows Platform
Desktop apps	ShareFile

Connector types

The following connector types can be enabled once:

- Box
- Dropbox
- Google Drive
- OneDrive

Alternatively, the remaining connectors require additional configuration. The following connector types can configure multiple connections for user access:

- On-premise connections

- OneDrive for Business

- SharePoint Online

Please note an Office 365 administrator must add the Citrix ShareFile Connector for Office 365 to secure ShareFile service access to Office 365 data.

Recommendations for using OneDrive for Business connector via ShareFile for Windows application

Problem

While using the OneDrive for Business connector via the ShareFile for Windows application, a default **Folder and Files** setting within the Windows operating system may lead to a large amount of API calls to the **Microsoft Graph API** when hovering over files or folders in the UI to display file size and file count information.

Recommendations

To avoid a large number of inadvertent calls to the **Graph API**, ShareFile recommends that you or your administrator disable the **Display file size information in folder tips** using the following steps:

1. In **Windows Settings** navigate to **File Explorer Options** > **View tab** > **Advanced Settings** > **Files and Folders** menu.

2. Deselect the **Display file size information in folder tips** option.

NOTES:

- This setting drastically reduces your API calls to **Microsoft Graph API** resulting in optimized performance of the ShareFile connector. For more information about throttling limits posed by Microsoft, see Microsoft's API throttling limits.

- As a best practice to lessen the complexities, ShareFile recommends avoiding large and complex folder structures when creating a Connector.

Configuration requirements

- Personal Cloud Connector access is enabled for a ShareFile account.
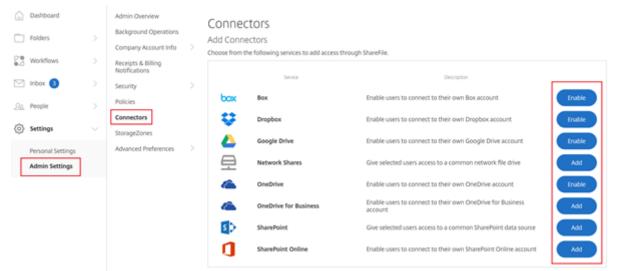
- Existing on-premises storage zone has connector features enabled on the primary storage zone controller.
- Employee users with the permission to Create and Manage Connectors have access to Connector settings in Admin Settings.
- To share files from connectors, Connector Sharing access must be enabled for the ShareFile account.
- Users with access to Connectors require **Use Personal File Box** permissions to share files from Connectors. Files shared from Connectors are copied to the File Box first. Recipients of the share link or email might not have immediate access to download those files until the copy is complete.
- This feature requires ShareFile managed storage zones (cloud storage).

Enable and add connectors for ShareFile users

> **Note:**
>
> Account owners can request to activate this feature on their ShareFile account.

For accounts that have Personal Cloud Connectors features enabled, employee users with the required permissions to manage and add connectors can open **Admin settings** > **Connectors**.

Select **Enable** or **Add** from the available connectors.

Manage access to connectors

When enabling and adding a Connector, you grant other users access to the Connector within their ShareFile account. The user has access to data locations within their own accounts. Local storage resource determines access-control permissions to those cloud-based data locations.

You can choose which employee users or distribution groups have access to their cloud-based or on-premises connector in the **Manage Access** dialog box. Click **Save** or **Skip** when done adding users. If you select skip, only the user that creates the connector, and the Super User Group, have access to the connector.

Add an on-premises SharePoint, Network File share, or Documentum Connector

> **Note:**
>
> An existing storage zone with Network Share or SharePoint connector features enabled is required to add on-premises connectors. For more information, see Create and manage storage zone connectors.

Employee users must have the permissions to **Create and Manage Connectors** and **Create root-level folders** to add on-premises connectors.

1. Navigate to **Admin Settings** > **Connectors** and then select **Add** next to Network Share or SharePoint connector. Please note that if you are using Citrix Cloud these settings are found in **Content Collaboration** > **Manage** > **Connectors**.

2. Within the **Add Connector** dialog box, enter the display name for the Connector. Connectors must have a unique name and not one currently used on the account.

3. You can choose the on-premises zone that is local to the Network Share or SharePoint site.

   > **Note:**
   >
   > The zone must either be in the same domain or have a trust relationship with the storage resource.

4. Enter the path to the Network File Share connector using the UNC Path or enter the Site using the HTTP or HTTPS URL of the SharePoint site or document library.

Other considerations include:

- Network File shares and SharePoint document libraries will require additional (basic) authentication upon opening the connector. The credentials used to log in to the ShareFile account might be different than the credentials required to authenticate to the Connector.
- If both Network File share and SharePoint connectors are configured, note the same credentials are used to authenticate with SharePoint libraries and Network File shares. If a user needs to use different credentials to access a connected library or share, the user must log out of their ShareFile account and close the browser session. When you open the connector, you need to authenticate using the alternate credentials.
- Basic Authentication does not support non-ASCII characters. If using localized user names, try using NTLM or Negotiate authentication.

- Due to a known Microsoft Issue, Network File share connectors cannot be accessed from the Microsoft Edge browser when utilizing a Citrix ADC for connector authentication.

Enable SharePoint Online Connector

SharePoint Online requires a few additional steps to work properly with ShareFile. Before taking any action in the ShareFile web application, you need to add the ShareFile app to your SharePoint Online site.

First, add the ShareFile App to your SharePoint Online site.

Navigate to this site where you replace the `<Tenant>` with your company/tenant name: `https://<tenant>.sharepoint.com/_layouts/15/appStore.aspx/appDetail/WA104379108`

Select the **Add** button, then follow the prompts.

NOTE:

In order for the app to function properly, please take the required steps to **Trust the ShareFile app** when prompted.

Once you have installed the app, navigate to **Admin Settings** > **Connectors** to view all Connectors available for your account.

Select **Enable** for the SharePoint Online connector. You are prompted to name the Connector and provide a Site URL.

Enter the URL path to your OneDrive for Business or SharePoint Online account. Enter the URL as follows, replacing "mysite"with your own domain/site name and adding the %loginname% wildcard where indicated. If you do not know your subdomain, you can find it in your web browser when you sign into OneDrive or SharePoint.
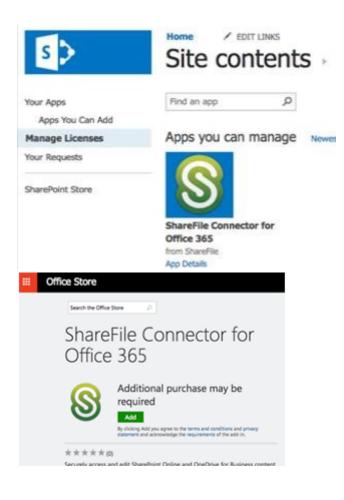
`https://mysite-my.sharepoint.com/personal/%loginname%/Documents` or
`https://.sharepoint.com/SitePages/Home.aspx`

ShareFile

By adding a user to the access list for a specific Connector, that user is able to use the Connector to link their account to another data storage service. Select **Save** to continue.

Alternatively add the Connector app to the respective SharePoint Online account if the above option does not work.

ShareFile

Notes and limitations

Item	Description
On-Prem Customer Restrictions	Personal Cloud Connectors are supported for accounts utilizing Customer-Managed storage zones that are associated with ShareFile-Managed storage zones. This feature is not available to accounts with no association to a ShareFile-Managed storage zone including on-prem or tenant setups.
Limitation	File uploads to Personal Cloud or SharePoint Online currently have a **maximum upload size of 200 MB per file**.
Limitation	File uploads to the OneDrive for Business Connector currently has a maximum upload size of 16GB.

Item	Description
Limitation	**Connectors must have a unique display name**. Users are blocked from using a connector name that is currently in use elsewhere on the account.
Limitation	Actions such as browsing folders or downloading files may fail when using Safari web browser. To resolve any issues, please ensure cookies are allowed in your Safari system preferences.

Storage zones

July 18, 2023

Storage zone provides administrators the flexibility to choose between ShareFile-managed, secure cloud storage, or IT-managed storage zones (on-prem) storage within your own data center. In addition to allowing users the ability to create and manage on-premises storage zones, users also have the option of utilizing ShareFile-managed storage zones.

For more information about storage zones controller including components, data storage, and more, see Storage zones controller 5.x.

Managing public storage zones on your account

Administrators can choose to enable a customized subset of ShareFile-managed storage zones on their account. Storage zones can be viewed at **Settings** > **Admin Settings** > **StorageZone**. From the storage zones menu, select **Citrix Managed**.

> **NOTE:**
>
> Contact ShareFile support if you require alternative ShareFile managed zones

From this menu, you can enable or disable specific zones on your account by clicking the check box to the left of the zone name. You can also edit the alias of a particular public zone by mousing over the **Alias** column to the right of the zone title. Edit the alias of a public zone to better suit the users on your account. In addition to editing your storage zones, you can see your current usage in the **Usage** column.

Selecting the default storage zone for a user

Account administrators can do the following:

- designate the default storage zone for a specific user on their account

- allow the user to create and manage storage zones

- allow the user to select a zone when creating a root-level folder.

Use the following steps to set up a user.

1. To modify the settings for a user on your account, navigate to **People** > **Browse Employees**.
2. Locate the user you would like to modify using the Browse or Search function, then use the **Manage** icon to open the user's profile page.
3. In the **Employee User Settings** section of the user page, use the Storage Location menu to choose the user's default storage zone.
4. In the **User Access** section, you can choose to allow the user the ability to create and manage zones by clicking the check box to the left of **Creates and manage StorageZone**.
5. In the **User Access** section, if you want your user to have the ability to select a zone when creating a root-level folder, click the check box for **Create and manage StorageZone**.
6. Once you have finished managing your user's storage zone and permissions, select **Save Changes**.

Enabling Limit access to files based on their content

Enable the **Limit access to files based on their content** setting if you have one or more private storage zones configured to use a third party DLP system to scan and classify documents. With this setting enabled, sharing and access filters are applied to documents based on the results of the DLP scan. Use the settings on this page to define the sharing and access filters for each classification.

- **Unscanned documents** - Allow these actions for documents that your DLP system has not scanned. This includes all documents stored in ShareFile-managed storage zones or other storage zones where DLP is not enabled.
- **Scanned: OK** - Allow these actions for documents that your DLP system accepted.
- **Scanned: Rejected** - Allow these actions for documents that your DLP system rejected because they contain sensitive data.

Advanced preferences

March 22, 2024

Email Settings

Send e-mails from

Some email services reject messages sent using the ShareFile mail server or flag the messages as spam. If you are getting any reports of email delivery problems, setting the preference to **user sending message** might resolve the issue. Once the preference is set, the name of the user sending the message appears in the **From** field and that user's email address is used when the message recipient replies to the message. This option might trigger message rejection as well, so do not use this option unless you are experience deliverability issues.

SMTP Server

By default, system notifications are sent from ShareFile mail servers to clients. At times this might not be ideal, especially when dealing with recipient mail servers that employ aggressive spam filters or whitelists. In these cases, setting a custom SMTP server allows you to send system notifications from your own mail server instead. Once these settings are configured, all emails sent through your account are sent through your mail server, instead of ShareFile's servers. By setting a custom SMTP on your account, your users recognize your email address as the sender and any failed emails come back to you. To use a custom SMTP, an employee user must have the **Allow this user to modify account-wide policies** permission.

If you use Microsoft Office 365 and would like to utilize custom SMTP, view this set up guide from Microsoft.

Setting up custom SMTP

1. Navigate to **Settings > Admin Settings > Advanced Preferences > Email Settings > SMTP Server**.

2. Click **Configure SMTP Settings**. The Custom SMTP Configuration page appears.

3. Enter the appropriate information to enable this feature.

Required fields:

- **Enable Custom SMTP** —This option must be selected if you want to use these settings.
- **Email Address** —This is the *from* email address of sent emails.
- **Server** —This is the host name of the email server that is used to send emails.
- **Port** —This is the port number to be used. Port 25 is the default. The following ports are also allowed: 26, 443, 465, 587, 2525.
- **Username** —This is the user name needed to access the server.
- **Password** —This is the password needed to access the server.

- **Notify Email on Failure** —This email address is sent notices if ShareFile Mail is unable to send an email with the given settings.

Optional fields:

- **Use SSL** —Choose between Implicit, Explicit, or Off.
- **Failback to ShareFile** —If selected, messages that fail to send using the custom settings prompt ShareFile to send future emails through standard email settings.
- **Authentication Method** —Select an authentication method here if a particular one is required by your server.

4. Click **Save and Sent Test Email** to complete the setup.

Troubleshooting your SMTP setup   Email Notifications / Messages are Delayed - This issue might occur when you are utilizing certain filter services or programs processing messages on your local mail servers. Before contacting ShareFile about delays in our system, verify that your messages are not being delayed by local filter services. One means of verifying that information is to review the full header details of a message and reviewing the time messages send between services or filters.

Email Notifications / Messages Do Not Arrive - This issue might occur if you have IP restrictions or policies on your local mail servers. See Firewall configuration to ensure you have whitelisted the custom SMTP IPs. Likewise, review your mail server authentication methods to ensure that ShareFile can communicate with your servers.

Too many connections from your host - This issue might occur when you have exceeded the maximum allowed connections on your SMTP server. To resolve this, you must update or increase your maximum allowed connections in your SMTP configuration, or use consolidated notifications to limit the number of connections you receive on a typical basis.

Notify users of their own activity

By default, even if a user has upload or download notifications for a folder, they do not receive notifications about their own activity in those folders. Enabling this option causes users with folder notifications set to receive updates about their own activity.

Upload Receipts

After enabling this setting, **Request a File** links that require recipients to enter their name and email before uploading emails a receipt email to the person uploading a file. Only request links that require name and email send upload receipts.

Email Notifications

When you set upload or download notifications for certain users on folders, users receive notifications about the uploads or downloads in real time by default. Users can change this default behavior by clicking the **Personal Settings** link in their account. However, if you want to set a default value for this setting for all users on your account, you can do so using this setting.

Changing this setting does not affect existing users in the system. It is only applied to newly created users. You can update this setting for individual users at their individual profile page.

Users can receive email notifications in the following languages: English, German, Spanish, French, Dutch, Japanese, or Portuguese.

Q&A Email Text

This feature determines whether the Folder Q&A feature sends the text of the questions and answers in the body of the notification emails. When set to no, the emails do not contain the question or answer text, but do include a link to sign in and view that information instead.

Encrypted Email

This option is used to enable the encrypted email feature. Setting the option to **No** prevents users from sending or responding to encrypted email messages.

Secondary Email Addresses

By default, all users on the account can configure a secondary email address for their profile. Setting the value to **No** removes the ability to configure a second email address for all users, including both employees and clients.

Permissions

Client Shares

By default, all clients who have download access to a particular folder have a **Send** button that allows them to send any of the files in the folder to a third-party recipient. However, in some use cases, companies do not want clients to be able to send files to third-parties, even though the client can download the files and send them to third-parties outside of the system. If **Yes** is selected, the **Share** button appears for clients inside all folders. If **No** is selected, the **Share** button only appears for employee users.

Folder Access List

To enable **Folder Access List**, navigate to **Settings** > **Admin Settings** > **Advanced Preferences** > **Permissions** then select **Yes** to **Show "People on this Folder"tab to non-administrators."**

When enabled, all users will be able to see the Folder Access List for folders they have access to. Otherwise, only users with Administrative rights on the folder will be able to see the list of other users for the folder.

File settings

Use **File Settings** to configure the following items:

- **Share settings**
- **Request settings**
- Set the **Default Retention policy**
- Enable **Sorting**
- Enable **Versioning**

Share Settings

The following provides ShareFile admins with the information necessary to manage the **Anyone (public)** and **Anyone (public, must enter name and email)** default share link options.

Access and manage your share settings by navigating from your ShareFile dashboard to **Admin settings** > **Advanced Preferences** > **File Settings** > **Share settings**.

Share settings

Available permissions

Choose who users are able to share files with.

☑ Anyone (public)

☐ Anyone (public, must enter a name and email)

☑ Client and employee users (after signing in)

☐ Employee users (after signing in)

☑ Email recipients (only for Outlook)

Default settings

Choose what will be selected by default when users share files.

Default permissions	Anyone (public) ⌄
Default permissions for Outlook	Anyone (public) ⌄

☑ Prevent users from changing default setting on Outlook

Maximum access expiration period	After 30 days ⌄

Save

Request settings

The following provides ShareFile admins with the information necessary to manage the **Anyone (public)** and **Anyone (public, must enter name and email)** default request link options.

Access and manage your request settings by navigating from your ShareFile dashboard to **Admin settings** > **Advanced Preferences** > **File Settings** > **Request settings**.

Retention policy

For accounts on the Professional plan and higher, the File Retention policy causes files to automatically be deleted some days after they are uploaded. This option can be configured separately for each root-level folder in the system. This setting determines the default file retention policy used when a new root-level folder is created. **Never** is the default value.

Sorting

By default, files and folders are displayed so that the most recent items are listed first. Users can choose a different order for files and folders by clicking the Title, MB, Uploader, or Creator headings. ShareFile remembers the order that they choose and uses this option to display files in the same order within that folder in the future. You can choose a different order in which files and folders display. To do so, choose a category to use to display files and whether they are to be displayed in **Ascending** or **Descending** order.

Versioning

If **Yes** is marked, when a user uploads a file to a folder that already contains a file with the same name, both versions of the file are saved so you can follow the progress of the file and prevent any data loss from overwriting. If **No** is chosen, uploading a file with the same name as an existing file causes the system to overwrite the older version of the file on your account.

You can set a maximum number of versions of files that the system saves. For example, if you choose to save up to 10 versions of a file, and you have 10 versions of a file stored on your account, any new uploads cause the oldest version of the file to be deleted.

Editing

When using Microsoft Office Online for viewing and editing, Office Online keeps a temporary copy of the file being viewed and edited for the purposes of rendering and making changes to the file. It is recommended that all administrators communicate this information to users along with reviewing the Microsoft Terms of Use and Privacy Policy. An Office 365 subscription is required for editing.

For more information on Microsoft Office previewing and editing, see Co-editing in ShareFile.

Cloud rendering

If Cloud Rendering is enabled, ShareFile keeps a temporary copy of the files (images, audio, PDFs) involved in your workflow.

When the workflow completes, ShareFile moves the files to the selected on-prem folder. If a user views any file related to a completed workflow, ShareFile makes a temporary copy of the file from on-prem to the ShareFile cloud cache. A file is available for up to one week in the cloud cache after the last time the file is viewed.

If Cloud Rendering is disabled, users are not able to use Feedback and Approval or Custom Workflow features with files stored on a customer managed storage zone. It is recommended that all administrators communicate this information to their users along with reviewing the ShareFile End User Services Agreement and Privacy Policy.

Enable ShareFile tools

You can enable or disable access to individual apps and tools on your account. Any changes in this menu impact all users on the account.

Show Apps Page in Navigation Bar allows the Apps link to be present in the upper right corner of your account. You can customize which tools are shown in this list. You can enable or disable the tools listed in this menu.

Folder templates

This tool allows you to create a default set of subfolders that can be added to new or existing folders on your account to allow for easy folder structure setup when the same subfolders are frequently used. An example of this is if you have separate folders for specific projects or clients on your account and information in each folder is always organized into the same subfolder categories. Applying a folder template to the folder automatically creates the default subfolders within the selected folder to streamline folder setup.

> **Important:**
>
> - Folders associated with a template cannot be deleted until the template association has been removed.
> - Folder template features rely on permissions that users must be granted.
> - When deleting a subfolder from the folder template, all instances of that folder within your account and all files contained within said folders are deleted. Folders deleted from a change to the template can be restored from the Recycle Bin.

Limitations

Users with a large amount of folders or deeply nested folder structures might not be able to apply folder templates to subfolders in bulk or rename existing folders in bulk.

There might be a delay while ShareFile processes template changes across your account. If you are editing templates that have been associated with many folders on your account, allow the web app time to process these changes before navigating away from the folder template menu.

Instructions

Create folder template   To create a template, navigate to **Settings > Admin Settings > Advanced Preferences > Folder Templates**.

You can enter a name for this template which allows you to identify the template if you set up more than one on the system. This title is not displayed in the folder screen. You can also enter a description which is displayed on the Dynamic Folder Templates page to help you further identify a specific template, if you create more than one on your account. When you are done, click **Create Template**.

On the next screen, click the title of your template to highlight it, and then click **Add Folder**. You can set up as many subfolders as you would like. To create a subfolder of a folder in the template, you can click the name of the folder that the new subfolder will be in, then click **Add Folder**. Once you are done, click **Finish**.

Add a template during folder creation   You can add a template when creating a folder. To do so, create a folder and use the **Apply Template** drop-down menu to apply a folder template. When you create the folder, the subfolders in the template are automatically set up inside the new folder.

You can also use a template to add subfolders to a folder that you have already created. To do so, navigate to the folder you want to modify and hover your mouse over the drop-down menu carat directly to the right of the folder's name, then click **Edit Folder Options**. In the folder template section, apply a template from the drop-down menu. To remove a template from a given subfolder, check the **Do not use a folder template** option in the menu.

Apply folder templates to subfolders in bulk   You can apply folder templates to subfolders in bulk. You must be an Employee user with the **Allow this user to edit folder templates** permission. You must also be a member of the super user group to use the **Apply Templates to Folder** button.

To apply templates, click **Settings > Admin Settings > Advanced Preferences > Folder Templates**. Locate the template you want to apply in bulk and click the **Apply To Folders** icon. At the menu, you can designate which folder you want to apply the template to. The template is then applied to all subfolders within the folder you choose. Once you have selected the folder, click **Apply**. Depending on your template, you might see a status screen as your templates are applied. Click **Apply** to finish.

Folder template permission requirements   To create folder templates, you must be an employee user with the **Allow this user to edit folder templates** permission enabled. You must also have access to set up root level folders on the account or have upload permissions in one or more folders where you can add subfolders.

To apply folder templates to subfolders in bulk, you must be an employee user with the **Allow this user to edit folder templates** permission enabled. You must also be a member of the Super User Group to use the **Apply Templates to Folder** button.

To apply a template to a folder, you must have Admin permissions on a folder to access the **Advanced Folder Settings** menu where you can view template association.

To edit or delete a folder associated with a template, you must first remove the template association. To do so, navigate to the folder in question and click the **Advanced Folder Options** using the drop-down menu beside the folder name. In the menu, scroll down to the folder template section and click **Remove Association**. You can now able to edit and delete the folder.

When deleting a subfolder from the folder template, all instances of that folder within your account and all files contained within the folders are deleted. Folders deleted from a change to the template can be restored from the Recycle Bin.

Remote Upload Forms

Remote Upload Forms let you place HTML code on your website that allows visitors to upload files from your website directly into your account. You can specify the folder that uploaded files get saved to, and what additional information to collect from the person uploading files.

> **Warning:**
>
> ShareFile does not provide extra code or advice beyond the provided sample. ShareFile cannot provide customer support for remote upload form code that has been modified beyond the template generated in the web application at the time of creation.

Users must be an employee user with the "Manage Remote Upload Forms" permission to create a remote upload form.

You can create a form in the ShareFile console by going to **Settings > Admin Settings > Advanced Preferences > Remote Upload Forms**, then clicking **Add New Form**.

Adding a new form

Form Description: This is the name of the form in the remote upload wizard page of your account. This name is not be shown on the form itself.

Choose Destination: Choose whether to store uploaded files in a specific Folder or a File Drop. If the File Drops feature is enabled on your account, you can designate a created File Drop as the upload destination. When choosing the File Drop option, use the list to choose from a list of File Drops that you have already created.

Choose Upload Folder: Choose the folder where you want uploaded files to be stored. This folder must be a folder in the **Shared Folders** section of your account. If this folder has not been created yet, you must create it before using the remote upload wizard.

Return users to: When a website is correctly entered into this field, a user that has uploaded a file to the Remote Upload Form is taken to the website chosen. Note that any address in this field requires `https://` to function properly.

Request Uploader Info: When checked, users must enter their email, first and last name, and company before adding files to the form. If this box is not checked, uploaders appear as Anonymous.

Custom Fields: You can add more fields using the + Add Custom Field option. You have the option of marking these fields as required.

Once you have completed the form, click **Save and Get Code**. You can then copy the raw HTML iframe for your Remote Upload Form.

This code remains available in the **Remote Upload Forms** section of your account. You can retrieve it by clicking the **View Code** icon, or delete it from the list by choosing the **Remove** icon.

FAQ for Remote Uploads for FINRA enabled accounts

There are a few differences when creating a **Remote Upload Form** for an account that has FINRA Archiving enabled account.

When creating a Remote Upload Form on an Archiving enabled account, why is the Add Custom Field(s) option not available?

This is intentional.

After generating the code for the Remote Upload Form with uploader information required, the page only has the upload space but no fields to enter uploader Information?

This is intentional. FINRA policy requires all content on an archiving account to be static. Those fields are added to the notes of a file, so they would not be static.

Those fields are not valid for archiving enabled accounts because they are not in compliance.

File drops

If the **File Drops** feature is enabled on your account, you can designate a created File Drop as the upload destination. When choosing the File Drop option, use the list to choose from a list of File Drops that you have already created. See File Drops for more information.

Folders
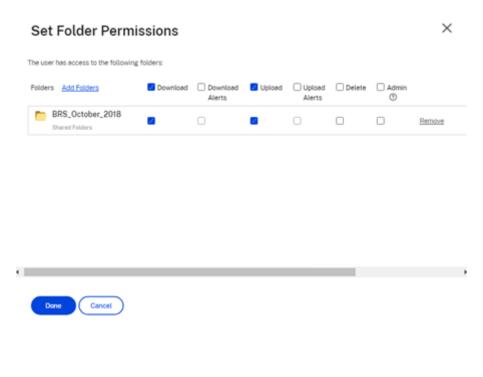
March 22, 2023

Assigning folders and setting permissions

You can customize your new employee's **User Access** and **File** settings. Depending on your account or plan and your own permissions, certain permissions might not be visible or applicable. **User Access** settings are typical access and feature-based permissions you can use to manage your employee's access and abilities on the account.

You can assign folders to your user, and add the user to Distribution Groups. You can also customize the user's permissions to various folders on your account. To grant a user access to a folder, choose the check box beside the folder name.

Folder limitations

Users with a large amount of folders or deeply nested folder structures might not be able to apply folder templates to subfolders in bulk or rename existing folders in bulk.

There might be a delay while ShareFile processes template changes across your account. If you are editing templates that have been associated with many folders on your account, allow the web app time to process these changes before navigating away from the folder template menu.

Personal Folders

As an employee user, you have **Personal Folders** in your assigned ShareFile account. By default, you can upload and download files from this folder. You can also create subfolders inside this folder and add other users to those subfolders with the permissions you desire.

> **Notes:**
>
> - Personal Folders are named with email address of the user at time of first login.
> - This is not synchronized with the users email address if changed and changing the name of the folder is not supported.

Shared Folders

Shared Folders contains all folders (created by you or other users) that you have access to. This is considered the root of the entire account.

Accessing another user's personal folders

Requirements

- Employee user with the following administrative permissions enabled:

    – **People: Manage employees**

    – **Company Account Info: Access reporting**

Instructions to access another's personal folders

1. Go to **People** > **Manage Users** > **Browse Employees**.

2. Select the **Manage** icon to the right of the user's name.

3. Select **View folders and activity logs**.

> **Note:**
>
> - As a super user, you can upload and download files as well as manage user access on any subfolders.
> - You can make any subfolder a favorite folder for easy access through the **Favorites** tab in the future.

Use personal File Box

The File Box is a personal storage space where employees can store files for a limited period. This space is not generally a collaborative or shared space, although some users might be given access to see other employee's File Boxes.

> **Note:**
>
> If you do choose to take away a user's access to the File Box, they are not able to use any email plug-in tool or add files from their computer when creating a Share message or Link.

See File Box for more information.

File Box

October 4, 2023

File Box allows you to temporarily store your files when sending or requesting files.

File Box allows the employee user to receive files directly from visitors when a designated link from **File Drops** is created. For more information, see File Drops.

> **Notes:**
>
> - The File Box adheres to the account-wide **Retention Policy**. If no account-wide retention policy has been set, the File Box will adhere to a default retention policy of 6 months (180 days).
> - To store files for a longer period, use **Move** to store your files in a permanent folder.
> - The current retention policy of your File Box is displayed toward the top of the File Box menu in ShareFile.
> - If you choose to take away a user's access to the File Box, they are not able to use any email plug-in tool or add files from their computer when creating a share message or link.

Prerequisites

In order to use a File Box, you must have the **Use personal File Box** permission. If you do not have access to the File Box, please contact your ShareFile administrator.

> **TIPS:**
>
> - The retention policy for File Box is account wide and cannot be changed per user.
> - File Box does not support versioning of files which means files cannot have multiple versions.
> - Files with the same name can be uploaded to File Box and will not overwrite the existing files. Both files will exist as separate entities.

Accessing your File Box

To access your **File Box**, navigate to **Folders** > **File Box**.

File Drops

January 6, 2023

When enabled, a file drop link allows you to designate a created **File Drop** as the upload destination. Once created, this link allows visitors to select an employee user on your account and drop files into the employee users **File Box**.

When choosing the **File Drops** option, use the list to choose from a list that you previously created.
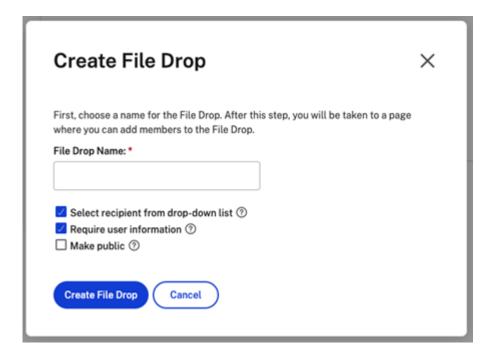
> **Note:**
>
> While this feature generates a URL you can use on your website, ShareFile does not provide additional code or advice beyond the provided URL.

Create File Drop

The following information provides the steps necessary to create a File Drop in ShareFile.

1. Navigate to **Settings** > **Admin Settings** > **Advanced Preferences** > **File Drops**.
2. Select **Create New File Drop**.

3. Enter a name for the File Drop then select **Create File Drop**.

4. Select recipients. Use search to find employee users.

> **Note:**
>
> Select **Make public** to make this filedrop accessible from your ShareFile subdomain (`https://yourcompany.sharefile.com/filedrop`).

5. Select **Save Changes** to complete the creation of the file drop.

For more information, see File Box.

Managing File Drops

Existing File Drops can be viewed and changed by navigating to **Settings** > **Admin Settings** > **Advanced Preferences** > **File Drops**.

To remove a previously created File Drop, select the check box next to the File Drop and click the **Delete Selected File Drops** button.

To view the URL that the individual File Drop is accessible from, click the corresponding icon under the **Direct Link** column.

Integrate with Remote Upload Forms

Remote Upload Forms let you place HTML code on your web site that allows visitors to upload files from your web site directly into your account. You can specify the folder that uploaded files are saved to and what additional information to collect from the person uploading files.

Navigate to **Settings** > **Admin Settings** > **Advanced Preferences** > **Remote Upload Forms** to create a new form. For more information, see Remote Upload Form.

People settings

March 21, 2024

Manage Users Home

Utilize manage users to do the following:

- Search for users including employee and client users.
- Create employee users and set access to folders, storage locations, and add to distribution groups.
- Create client users and set access to folders and distribution groups.

Search Users

Use the search function to find existing employee or client users.

Create New Users

New users for the ShareFile account can be created as either an employee user or a client user.

Create Employee   An employee user is an internal user within your company. Employee users are granted a wide range of permissions and access to your account. Creating an employee user consumes an employee license.

Requirements to create an employee user

- The **manage employee users** permission.
- Employee users can only grant or revoke permissions that they themselves have been granted.
- Only **account administrators** can delete users from the system.
- An email address can only be associated with ONE user at a time. You cannot use the same email address for multiple users.

To create an employee, go to **People > Manage Users Home** in ShareFile. Use the **Create Employee** button to begin creating an employee user.

Type your user's name, email address, and company info. Depending on your account type, you can customize the user's individual bandwidth limit.

You can customize your new employee's **User Access** and **File** settings. Depending on your account or plan and your own permissions, certain permissions might not be visible or applicable. **User Access** settings are typical access and feature-based permissions you can use to manage your employee's access and abilities on the account.

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You can assign folders to your user, and add the user to Distribution Groups. You can also customize the user's permissions to various folders on your account. To grant a user access to a folder, choose the check box beside the folder name.

You can send a Welcome Email to your new user or opt to do so later. This email includes a link to

activate their new account.

Resend a welcome email or employee activation link　When a user is added, they are provided an activation link (by email or by a link generated and delivered by the creator). If the newly created user does not access that activation link within 30 days, a new activation link must be sent. When resending an activation link, the previous activation link is deactivated.

To resend the welcome email containing the activation link

1. In ShareFile, go to **Users > Resend Welcome Emails**.
2. Enter your user's email address or name to add them to the To field, or select them from the Address Book.
3. Customize your email message as needed.
4. Click **Send**.

Accounts utilizing SAML　If you have configured a SAML SSO provider on your account and have created an employee user without any admin permissions, the user does not see or is not prompted to change their password within the activation email. Instead, that user is expected to sign in with their SAML credentials.

Strict employee licensing and company email address　By default, you cannot create a client user with the same email suffix as your company (ex: `johndoe@company.com`). This option is designed to prevent accounts from circumventing employee licensing requirements.

Admins receive an email notification that allows them to review and approve the user creation request.

Manage employee permissions

ShareFile permissions are designed to give you granular control of your account and the permissions of your users.
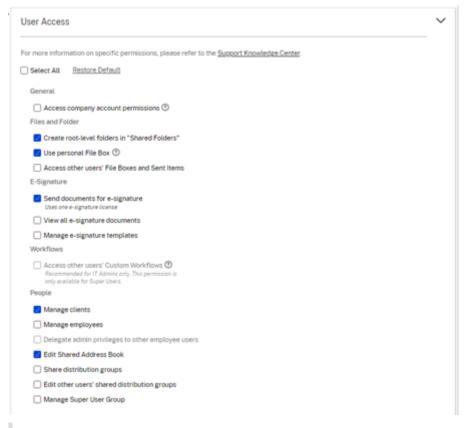
Requirements to modify permissions

- The **delegate administrator privileges to other employee users** permission or **Manage Employee Users** permission.
- Employee users might only give or edit the permissions that they themselves have been given.

How to manage permissions

1. In ShareFile, go to **Users > Manage Users Home**.
2. Browse or search for your user. Choose the user or the **Manage** icon on the right to open the user profile.
3. Change permissions as needed, then **Save**.

Default employee permissions   When creating an employee, the following permissions are granted by default. You can change these settings during the user creation process.

Note:

A gray setting indicates a permission that the creating user does not have access to or is not permitted to give to others, so they cannot grant that permission to another user.

Basic information

- Created - Date account is created.
- Email Address - The user's email address.
- First Name
- Last Name
- Company name

- Notifications - Change the user's default **Notification Frequency** settings.
- Default email language - Change the user's default **Email Notification Language**.
- Password - When a user wants to change their password, they can use the **Forgot Password** link on the sign-in screen. If the link is not marked, they need to contact an employee who can manage employee permissions for help with signing in.
- Bandwidth limit - You can choose a maximum monthly bandwidth allowance for the employee. This limit prevents the employee from personally uploading and downloading more data than you allow. It also applies to all of their folders, so that they cannot share files with others more than you would like. Employee bandwidth limits can also affect clients that the employee supports by limiting how much they can download from the employee's folders. Bandwidth limits are used by accounts where employee use might need to be limited to prevent bandwidth overages.
- Authentication - This setting is offered if the customer is using ShareFile credentials or two-step verification.

Access personal settings   In personal settings, a user can manage their name, company name, and avatar. They are able to update or change their password on this page if they have the permission to change their password.

Access Company Account Permissions   Advanced Preferences are account-wide settings that can be turned on or off by an employee user granted the **Access Company Account Permissions** permission. These settings can be found at **Manage > Advanced Preferences**.

Create Client   Create an external client with limited access to shared folders.

Requirements to create an external (client) user

- Any employee user can go to **People** > **Browse Client** > **Add Client** to send an email request to a prospective client.
- The **Manage client users** permission.
- Changing an external (client) email address or deleting an external (client) user from the system both require the **Manage employee users** permission.

To create an external (client) user, navigate to **Users > Manage Users Home**. Select the **Create Client**. The **Create New Client** screen displays.

You can assign folders to your user, and add the user to distribution groups. You can also copy folder permissions from an existing user to your new one. Using the **Copy Folder Access** option copies only folder permissions, not account permissions.

You can then send a welcome email to your new user, or opt to do so later. This email includes a link to activate their new account.

Give User Access to Folders   You can also create a client user from the **Add People to Folder** menu. A client user is created if you add an individual to a folder that is not currently a member of your account.

1. Click the name of the folder where you would like to grant the new user access.
2. Access the **People** tab or the folder access menu.
3. Click the **Add People to Folder** button.
4. Click **Create New User** to add a client user to your account with access to this specific folder.
5. The user's email address, first name, and last name are required. The user is created as a client user and added to the list of users in the pane on the left.
6. Check the **Notify Added Users** option in the bottom right.
7. Save the changes. Your user then receives an email notification that they have been added to the folder and must activate their account.

Send to specific people   **Send to specific people** allows you to send your files using ShareFile email system. With this method, the recipient receives an email message containing a secure link to download the files. You can send a file stored on your account, or send a file stored on your computer.

See Send to specific people for more information.

Browse Employees

From ShareFile, click **People > Browse Employees** and locate the employee user. Click their name to access their profile page.

Browse Clients

From ShareFile, click **People > Browse Clients** and locate the client user. Click their name to access their profile page.

Shared Address Book

The Shared Address Book is shared across all employee users. This address book can be accessed when you are adding users to folders or quickly sending a file.

Distribution Groups

When setting up a new Distribution Group, users can share the group with all employees. If this permission is enabled, the employee user is able to add more users to a group that has been created on the system and shared with others.

Resend Welcome Emails

> **Note:**
>
> If you need to resend an existing user an activation email, you will need the **Manage employees** or **Manage clients** permission.

To resend the welcome email containing the activation link:

1. In ShareFile, go to **People > Resend Welcome Emails**.

2. Enter your user's email address or name to add them to the To field, or select them from the address book.

3. Customize your email message as needed.

4. Select **Send**.

Client users

February 28, 2024

ShareFile provides several ways to add a client user. Client users have limited access to your ShareFile account based on how they are added and how you set permissions for new clients.

Create Client in Manage Users

ShareFile users can add clients using the following steps from their ShareFile account dashboard.

1. Sign into ShareFile.

2. Select **People** > **Manage Users Home** > **Create Client**.

The **Create New Client** screen displays.

3. In **Step 1: Basic Information** enter the information for the client including **First Name**, **Last Name**, **Email Address**, and **Company**.

4. In **Step 2: Give User Access to Folders** select **Assign Folders**. See Give User Access to Folders for more information. Other options include:

   - **Adding people to a distribution group**

   - **Copy Folder Access from Existing User** - which saves time setting folder access permissions when creating a client. Using the **Copy Folder Access** option copies only folder permissions, not account permissions.

5. Select **Create & Continue**.

The **Notify Users** displays and provides the ability to send a customized **Welcome** message to let the client know they are added to your account.

> **Important:**
>
> New clients must verify their email address to have access.

6. Select **Notify**.
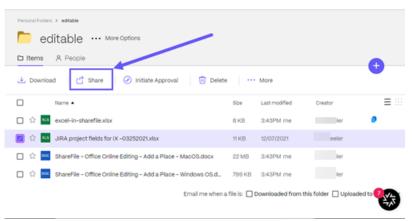
The "Invitation(s) sent successfully"message displays briefly and the **Browse Clients** dashboard screen displays allowing you to review the added client.

Create a client using a shared file link

ShareFile makes it easy to add a client when you share a file. Use the following steps to complete the process in adding a client when using **Share** to create a link.

1. Navigate to the file that you want to share in your ShareFile account.

2. Select the file or files that you want to share.

3. Select **Share** from the menu.

4. Select **…** to **Edit** the options for the link.

5. To create a client, under **Who can access this link:** select **Anyone** (public, must enter name and email).

> **Important:**
>
> If you select **Anyone (public)**, the link you send will NOT require the recipient to enter their name and email and will not create them as a **Client** once they access the file. Only **Anyone** (**Public must enter name and email**) will create a new client once the recipient signs in to access the shared file.

6. Select **Copy** under the options offered.

The **Link copied to your clipboard** message displays briefly.

7. Use the copied link to share with your email or another communication app.

8. Once the recipient accesses the shared file, navigate to **People** > **Browse Clients** and select the recipients name.

9. Under the **Basic Information** tab you can enter additional information about the client.

10. Select **Save Changes**.

11. Select the client again then select **Email Login Information** from the **Actions** > **User-level** right-hand side menu to open the **Resend Welcome Emails** screen to let the user know they've been added to the account.

12. Select **Notify**.

The "Invitation(s) sent successfully" message displays briefly and the **Browse Clients** dashboard screen displays allowing you to review the added client.

The recipient receives a message asking them to activate their account.

Create a client by adding them to a folder

You can create a new client by adding a new user to an existing folder in your ShareFile account. Use the following steps to complete the process by adding a new user to a folder.

1. In your ShareFile account, open the folder you want to add a new user to.

2. Select **People**.

3. Select **Add People to Folder**.

   The **Add People to Folder** pop-up displays.

4. Select **Create New User**.

5. Enter the information requested for the new user including the required fields for **Email Address**, **First Name**, and **Last Name**. **Company** is optional.

6. Set the **Folder Permission** for the new user.

7. Select **Notify added users** to ensure the new client is notified and can receive an activation link.

8. Use the option to **Apply settings to subfolders** if necessary.

9. Select **Add**.

   The "People added successfully" message displays briefly.

10. Navigate to **People** > **Browse Clients** and select the person you added to the folder.

11. Under the **Basic Information** tab you can enter additional information about the client.

12. Select **Save Changes**.

13. Select the client again then select **Email Login Information** from the **Actions** > **User-level** right-hand side menu to open the **Resend Welcome Emails** screen to let the user know they've been added to the account.

14. Select **Notify**.

   The "Invitation(s) sent successfully" message displays briefly and the **Browse Clients** dashboard screen displays allowing you to review the added client.

   The recipient receives a message asking them to activate their account.

SHAREFILE

Resend a client user activation email

If you need to resend an existing client user an activation email, you will need the permission to **Manage clients**.

To resend the welcome email containing the activation link:

1. In ShareFile, navigate to **People** > **Browse Clients**.

2. Search or select the clients name.

3. Select the clients name or the manage icon to open the clients page.

4. Under **Actions** select **Email Login Information**.

   The **Resend Welcome Emails** screen displays witht he client name pre-populated.

5. Customize your email message as needed.

6. Select **Notify**.

Send a client user a password reset email

1. In ShareFile, navigate to **People** > **Browse Clients**.

2. Search or select the clients name.

3. Select the clients name or the manage icon to open the clients page.

4. Under **Actions** select **Reset Password**.

The **Send Password Reset Email** popup displays.

5. Select **Send**.

Delete a client

Use the following intructions to delete a client.

1. Sign into ShareFile.

2. Navigate to **People** > **Browse clients**.

3. Select the manage icon next to the listed client you want to delete.

The client screen displays.

4. Under **Actions** select **Delete from system**.

   The Remove Client confirmation screen displays.

5. Select **Continue**.

   The confirmation banner displays briefly.

The client is no longer in the system.

Employee users

February 8, 2024

An employee user is an internal user within your company. Employee users may be granted a wide range of permissions and access to your account.

Requirements & capabilities of an employee user

- The manage employee users permission
- Employee users may only grant or revoke permissions that they themselves have been granted
- Only account administrators may delete users from the system
- An email address can only be associated with ONE user at a time. You cannot use the same email address for multiple users.

Create an employee user in Manage Users

ShareFile users can add clients using the following steps from their ShareFile account dashboard.

1. Sign into ShareFile.

2. Select **People** > **Manage Users Home** > **Create Employee**.

The **Create New Employee** screen displays.

3. In **Step 1: Basic Information** enter the information for the client including **First Name**, **Last Name**, **Email Address**, and **Company**.

---

4. In **Step 2: User Settings** select the User Access by setting the Users roles and User permissions. For more information, see User roles and permissions

5. In **Step 3: Give User Access to Folders** select **Assign Folders**. See Give User Access to Folders for more information. Other options include:

   - **Adding people to a distribution group**

   - **Copy Folder Access from Existing User** - which saves time setting folder access permissions when creating an employee user. Using the **Copy Folder Access** option copies only folder permissions, not account permissions.

6. Select **Create & Continue**.

   The **Notify Users** displays and provides the ability to send a customized **Welcome** message to let the employee user know they are added to the account.

7. Select **Notify**.

ShareFile

The "Invitation(s) sent successfully" message displays briefly and the **Browse Employees** dashboard screen displays allowing you to review the added employee.

Resend an employee user activation email

If you need to resend an existing user an activation email, you will need the permission to **Manage employees**.

To resend the welcome email containing the activation link:

1. In ShareFile, navigate to **People** > **Browse Employees**.

2. Search or select the employees name.

3. Select the employees name or the manage icon to open the employees page.

4. Under **Actions** select **Email Login Information**.

   The **Resend Welcome Emails** screen displays witht he client name pre-populated.

5. Customize your email message as needed.

6. Select **Notify**.

Send an employee user a password reset email

1. In ShareFile, navigate to **People** > **Browse Employees**.

2. Search or select the employees name.

3. Select the employees name or the manage icon to open the employees page.

4. Under **Actions** select **Reset Password**.

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The **Send Password Reset Email** popup displays.

5. Select **Send**.

Delete employee users

November 2, 2023

This article explains the process to remove employee users from your ShareFile account.

Requirements

- Manage employee users permission must be enabled.

Instructions

1. Navigate to **People** > **Browse Employees**.

2. Select the employee user that you want to remove by clicking the **Manage** icon in the same row as the employee users name.

3. Under **Actions**, select **Delete from system**.

4. When asked to **Assign files owned by this employee to**:, select yourself or click the **X** to search another employee user to own the reassigned items.

5. Select **Delete and Reassign**.

> **Tip:**
>
> When a user is deleted, the content of their **Personal Folders**, **Shared Folders**, and **Projects** they owned must be reassigned.

The employee user is now deleted and their files contents are reassigned.

> **Notes:**
>
> - Deleting a user requires the reassignment of files, folders, and projects to another user. Share ownership will change to the new assigned user.
>
> - ShareFile recommends running all necessary user reports before deleting the user from system.
>
> - Deleting a user from the system is permanent. Their employee license becomes available immediately. An employee user that owned several items might take several moments for the reassignment operation to complete.
>
> - Once the folders are reassigned, the new owner can delete the folders from Shared Folders. Personal Folders are titled with the previous employee's email address.
>
> - Inbox and Sent message items cannot be deleted.
>
> - **File Box**, **Inbox**, and **Sent** message items of the deleted user reassigned to the user selected.

Distribution Groups

August 21, 2023

ShareFile allows you to create **Distribution Groups** to consolidate users into functional groups for more efficient account management.

This feature is useful for managing large groups of users with similar folder access needs.

Prerequisites

Managing Distribution Groups requires the following permissions:
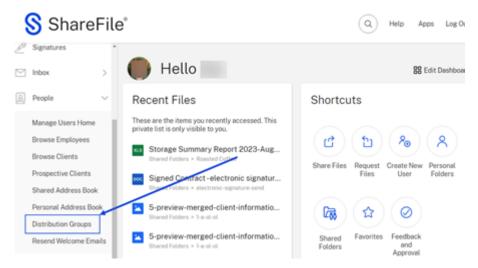
- Create shared distribution groups
- Edit shared distribution groups

Create a distribution group

The following provides the steps necessary to create a distribution group in ShareFile.

> **Notes:**
>
> - Members added to the Distribution Group will inherit the folder access permissions of the group.
> - Members removed from the Distribution Group will lose the folder access permissions given to that group.
> - Permissions given on a folder to a distribution group will apply to every member. This includes notifications about downloads and uploads.

1. Once you are signed into your ShareFile account, navigate to **People** > **Distribution Groups**.
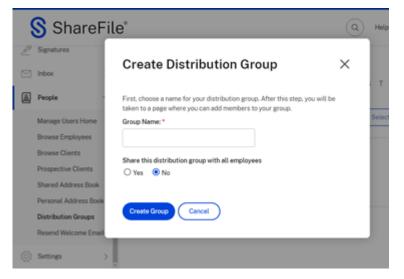
2. From the **Distribution Group** dashboard, select **New Group**.

The **Create Distribution Group** popup displays.
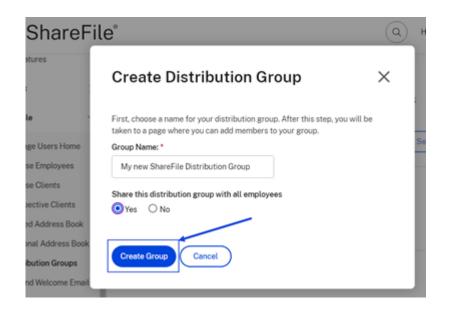
3. Type in a name for the new distribution group.

   > **Note:**
   >
   > You have the option to **Share this distribution group with all employees**. The default selection is **No**. Select **Yes** if desired.
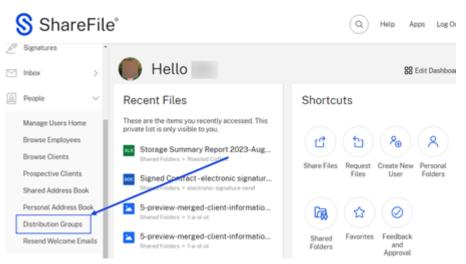
4. Select **Create Group**.

ShareFile

Adding people to a distribution group

The following provides the steps necessary to add people to a distribution group.

1. Once you are signed into your ShareFile account, navigate to **People** > **Distribution Groups**.

2. Select from the exisiting distribution groups to open it.

3. Select **Add New User**.

4. Select the find people icon.

   The **Address book** screen displays.

5. Select the users you want to add then select **Add**.

6. Select **Save** to add new users to the distribution group.
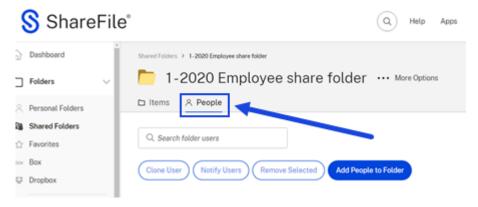
The **Member(s) added successfully** confirmation message displays.

Adding a distribution group to a folder

The following provides the steps necessary to add a distribution group to a ShareFile folder.

1. From your ShareFile navigate to the folder you want to add a distribution group to then open it.

2. Select the **People** tab.

3. Select **Add People to Folder**.
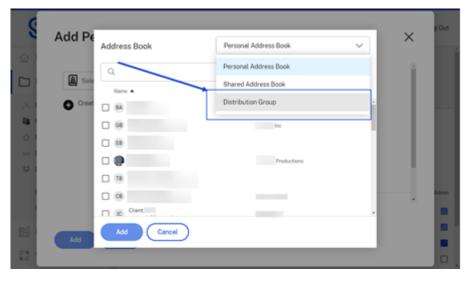
The **Add People to Folder** popup screen displays.

4. Select the find people icon.

The **Address book** screen displays.

5. Select **Distribution Groups** from the drop-down menu.
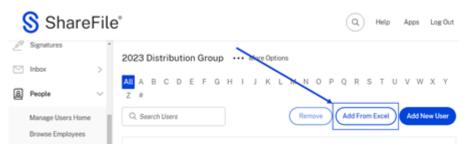
6. Select the distribution group you want to add. Then select **Add**.

   The members of the distribution group you selected now have access to the folder.
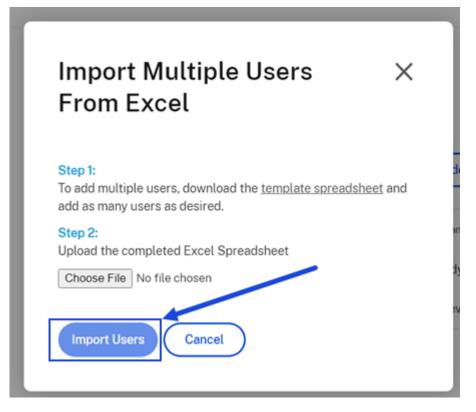
Importing multiple users from Excel to a distribution group

The following provides the steps necessary to import multiple users from Excel into a distribution group

1. Once you are signed into your ShareFile account, navigate to **People** > **Distribution Groups**.

2. Select from the exisiting distribution groups to open it.

3. Select **Add From Excel**.

4. Follow the steps listed on the **Import Multiple Users From Excel** pop-up.

Distribution Group FAQs

How many users can I add to a Distribution Group?

A distribution group can have a maximum of 2000 users.

I added a user to a folder when they already had access through a Distribution Group. What permissions apply?

The individual user's access will override that of his/her group. Example: John Doe has Download permissions on a folder due to his membership in the Doe Distribution Group. You add John Doe to the folder manually, and grant him Upload permissions. He will have both Download and Upload permissions, even though his Distribution Group membership does not include Upload.

How do I generate a Group Membership list?

To generate a membership list for your review, access **People** > **Manage Users** or **Distribution Groups**. Select the group name to access it. Access the Generate Report drop-down menu and choose Export Group List. Once the list is generated, a spreadsheet is downloaded to your local computer.

How do I generate a Folder Access report?

A Folder Access report shows which folders and permissions the Distribution Group has access to. To generate a folder access report for your review, access **People** > **Manage Users** or **Distribution Groups**. Select the group name to access it. Access the **Generate Report** drop-down menu and choose **Folder Access**. You can print this list for your records.

User roles and permissions

January 30, 2024

The following information provides descriptions for both user roles and user permissions in ShareFile.

User roles

User role	Description
Account owner	As the account owner, you have an employee user type with the highest level of permissions. This allows you to authorize account-wide settings and delegate privileges to other employee administrators. There is only one account owner role per account.
Administrator	As a ShareFile administrator, you have an employee user type with granular administration privileges on the account. Depending on your administrator permission, you can authorize account changes on behalf of the account owner.
Super user	As a designated user for the **Super User Group**, you have automatic access with full control (download, upload, delete, and share) to all new existing folders within a ShareFile account, and can manage all the account data.

User permissions

Permission Type	Permission name and description
General	**Access company account permissions** - Allows the user to access and change account-wide permissions.
Files and folders	Allows the user to manage files and folders including assigning folders and setting permissions. For more information, see Folders.
RightSignature	This allows electronic signature capabilities such as send for signature and view electronic signature documents. For more information, see Electronic signature.
Workflows	**Access other users'Custom Workflows** - Allows the user to manage Custom Workflows created by other users.
People	Allows the user to manage employee users and clients. For more information, see People settings.
Company account info	Allows the user to configure account settings such as branding, access reports, and other account tasks. For more information, see Company account info.
Billing	This allows users to review receipts and billing information. For more information, see Billing.
Connectors	Connectors allow employees to access files and folders stored on a connected on-premises or cloud-based resource. For more information, see Connectors.
Storage zones	Storage zones controller extends the ShareFile Software as a Service (SaaS) cloud storage by providing your ShareFile account with private data storage. For more information, see Storage zones.
Advanced preferences	This allows users to make changes to settings like email, SMTP servers, and more. For more information, see Advanced preferences.

Firewall configuration

March 22, 2024

All ShareFile tools use port 443.

> **Important!**
>
> - The inclusion of `*.sharefile.io` is required for future ShareFile feature releases and improved functionality. Please update your domain inclusion list by **June 30, 2023**.
>
> - If you are not in a managed work environment and do not have access to an IT department, this inclusion listing is likely not going to impact your experience and no action is needed.
>
> - For users in a managed network environment, please partner with your IT department to configure or update your domain inclusion list if needed.
>
> - Sharefile support can allow / deny traffic to Sharefile from specified IP addresses. For more information, see Restricting users access from specific IP Ranges or Addresses.
>
> - It is the responsibility of your IT department to ensure traffic is originating from the IP(s) specified.

Domain inclusion list

ShareFile recommends inclusion listing the domains listed when possible.

- *.sharefile.com
- *.sf-api.com
- *.sharefile.eu
- *.sf-api.eu
- *.citrixdata.com
- *.securevdr.com
- *.sharefileftp.com
- *.sharefile.io
- *.pendo.io
- *.harness.io
- *.sharefile-webdav.com
- *.sharefileconnect.com
- *.sf-event.com
- *.launchdarkly.com
- sf-cv.sharefile.com
- sf-rendering.sharefile.com

- *.sf-cdn.net
- sf-cv.sharefile.eu
- sf-assets.sharefile.com
- *.novu.co

ShareFile FTP information

DNS	Server	IP
ftp-ap.sharefileftp.com	ftp-apse1-1	54.254.202.61
	ftp-apse1-2	13.251.228.140
ftp-br.sharefileftp.com	ftp-saeast1-1	52.67.147.208
	ftp-saeast1-2	18.228.76.227
ftp-ec2.sharefileftp.com	ftp-useast1-1	54.208.212.106
	ftp-useast1-2	54.174.90.77
	ftp-useast1-3	54.209.86.181
	ftp-useast1-4	52.6.0.127
ftp-eu.sharefileftp.com	ftp-euwest1-1	54.194.108.219
	ftp-euwest1-2	34.251.100.86
ftp-eu2.sharefileftp.com	ftp-euc1-1	52.28.1.204
	ftp-euc1-2	18.156.24.20
ftp-syd.sharefileftp.com	ftp-apse2-1	54.206.19.242
	ftp-apse2-2	3.105.40.156
	ftp-apse2-3	13.238.209.232
ftp-usw.sharefileftp.com	ftp-uswest2-1	52.37.175.31
	ftp-uswest2-2	54.69.185.204

> **NOTE:**
>
> - **ShareFile Storagecenter Addresses** - A list of IP addresses for our cloud-based storage centers is available from AWS.

ShareFile Email notification IPs

ShareFile email notifications name	IP address
`*.sf-notifications.com`	198.37.153.46 or 198.21.0175 (for trial accounts)
`mail@sf-notifications.com`	167.89.16.23 167.89.16.232
`noreply@sf-notifications.com`	167.89.16.230 167.89.16.232
`sharefile@sf-notifications.com`	167.89.16.23 198.37.153.46 167.89.16.230 167.89.16.232

ShareFile Control Plane IP Ranges

Allow traffic to the listed connections in the US and EU Control Plane from your on-premises environment to communicate with the **ShareFile Control Plane**.

Example Scenarios:

- Requests sent to ShareFile from an on-premises storage zone controllers for a health check and data transfers.
- Users initiating data transfers using ShareFile web, desktop, and mobile tools.

US Control Plane

NOTE:

The latest IP addresses added to this list are identified using **bold**.

CIDR Notation	IP Address	Netmask
52.1.177.90/32	52.1.177.90	255.255.255.255
52.3.211.188/32	52.3.211.188	255.255.255.255
52.22.72.157/32	52.22.72.157	255.255.255.255
52.87.3.154/32	52.87.3.154	255.255.255.255
52.200.24.193/32	52.200.24.193	255.255.255.255
52.87.91.51/32	52.87.91.51	255.255.255.255
52.37.219.8/32	52.37.219.8	255.255.255.255
52.37.89.58/32	52.37.89.58	255.255.255.255
52.37.52.41/32	52.37.52.41	255.255.255.255

CIDR Notation	IP Address	Netmask
52.11.136.239/32	52.11.136.239	255.255.255.255
52.37.208.125/32	52.37.208.125	255.255.255.255
52.37.210.167/32	52.37.210.167	255.255.255.255
52.200.24.11/32	52.200.24.11	255.255.255.255
52.37.129.37/32	52.37.129.37	255.255.255.255
52.6.55.146/32	52.6.55.146	255.255.255.255
52.37.243.95/32	52.37.243.95	255.255.255.255
3.94.248.86/32	3.94.248.86	255.255.255.255
3.213.151.108/32	3.213.151.108	255.255.255.255
100.24.163.216/32	100.24.163.216	255.255.255.255
100.25.95.239/32	100.25.95.239	255.255.255.255
3.218.174.246/32	3.218.174.246	255.255.255.255
35.170.240.139/32	35.170.240.139	255.255.255.255
3.217.81.52/32	3.217.81.52	255.255.255.255
3.208.185.30/32	3.208.185.30	255.255.255.255
54.161.218.199/32	54.161.218.199	255.255.255.255
34.202.201.239/32	34.202.201.239	255.255.255.255
54.196.214.245/32	54.196.214.245	255.255.255.255
34.227.203.234/32	34.227.203.234	255.255.255.255
54.166.105.254/32	54.166.105.254	255.255.255.255
54.163.57.146/32	54.163.57.146	255.255.255.255
54.163.57.200/32	54.163.57.200	255.255.255.255
3.225.182.160/32	3.225.182.160	255.255.255.255
3.86.137.66/32	3.86.137.66	255.255.255.255
34.236.102.120/32	34.236.102.120	255.255.255.255
34.237.178.245/32	34.237.178.245	255.255.255.255
34.237.80.135/32	34.237.80.135	255.255.255.255
52.1.74.147/32	52.1.74.147	255.255.255.255
52.21.196.12/32	52.21.196.12	255.255.255.255

CIDR Notation	IP Address	Netmask
52.4.155.245/32	52.4.155.245	255.255.255.255
52.45.187.193/32	52.45.187.193	255.255.255.255
52.54.145.13/32	52.54.145.13	255.255.255.255
52.54.57.222/32	52.54.57.222	255.255.255.255
54.156.235.204/32	54.156.235.204	255.255.255.255
54.165.232.145/32	54.165.232.145	255.255.255.255
54.83.66.127/324	54.83.66.127	255.255.255.255
34.203.96.105/32	34.203.96.105	255.255.255.255
54.145.88.246/327	54.145.88.246	255.255.255.255
54.197.162.63/32	54.197.162.63	255.255.255.255
173.199.0.0/18	173.199.0.0 - 173.199.63.255	255.255.192.0
13.248.193.251/32	**13.248.193.251**	**255.255.255.255**
76.223.1.166/32	**76.223.1.166**	**255.255.255.255**
75.2.123.246/32	**75.2.123.246**	**255.255.255.255**
99.83.158.181/32	**99.83.158.181**	**255.255.255.255**

EU Control Plane

> **NOTE:**
>
> The latest IP addresses added to this list are identified using **bold**.

CIDR Notation	IP Address	Netmask
52.28.80.248/32	52.28.80.248	255.255.255.255
52.28.86.15/32	52.28.86.15	255.255.255.255
52.28.93.20/32	52.28.93.20	255.255.255.255
52.28.106.33/32	52.28.106.33	255.255.255.255
52.28.123.31/32	52.28.123.31	255.255.255.255
52.28.123.168/32	52.28.123.168	255.255.255.255
52.48.148.82/32	52.48.148.82	255.255.255.255

CIDR Notation	IP Address	Netmask
52.50.40.140/32	52.50.40.140	255.255.255.255
52.50.103.48/32	52.50.103.48	255.255.255.255
52.50.103.153/32	52.50.103.153	255.255.255.255
52.49.128.78/32	52.49.128.78	255.255.255.255
52.50.108.81/32	52.50.108.81	255.255.255.255
52.50.111.193/32	52.50.111.193	255.255.255.255
52.28.124.54/32	52.28.124.54	255.255.255.255
52.48.197.157/32	52.48.197.157	255.255.255.255
52.28.126.247/32	52.28.126.247	255.255.255.255
18.196.153.205/32	18.196.153.205	255.255.255.255
35.158.181.96/32	35.158.181.96	255.255.255.255
54.93.144.35/32	54.93.144.35	255.255.255.255
3.121.15.139/32	3.121.15.139	255.255.255.255
3.121.255.90/32	3.121.255.90	255.255.255.255
35.157.224.37/32	35.157.224.37	255.255.255.255
18.184.195.75/32	18.184.195.75	255.255.255.255
35.156.143.205/32	35.156.143.205	255.255.255.255
35.156.161.131/32	35.156.161.131	255.255.255.255
35.157.201.218/32	35.157.201.218	255.255.255.255
35.157.208.120/32	35.157.208.120	255.255.255.255
52.28.176.168/32	52.28.176.168	255.255.255.255
52.29.102.192/32	52.29.102.192	255.255.255.255
52.57.51.106/32	52.57.51.106	255.255.255.255
52.28.189.54/32	52.28.189.54	255.255.255.255
18.157.252.190/32	18.157.252.190	255.255.255.255
18.157.205.75/32	18.157.205.75	255.255.255.255
18.156.24.20/32	18.156.24.20	255.255.255.255
78.108.112.0/20	78.108.112.0 - 78.108.127.255	255.255.240.0
13.248.181.201/32	**13.248.181.201**	**255.255.255.255**

ShareFile

CIDR Notation	IP Address	Netmask
76.223.50.161/32	76.223.50.161	255.255.255.255
75.2.122.192/32	75.2.122.192	255.255.255.255
99.83.226.161/32	99.83.226.161	255.255.255.255

Outgoing requests - ShareFile to client

Allow traffic to the listed connections in **Outgoing requests** to your on-premises environment to communicate with the **ShareFile Control Plane**.

Example Scenarios:

- Requests sent from ShareFile to an on-premises storage zone controllers for data transfers.

Region	Primary IP1	Primary IP2	Primary IP3	Primary IP4	Primary IP5
us-east-1 (Virgina)	34.192.163.240	34.192.163.223	54.211.41.206	52.21.5.67	34.196.106.20
us-west-2 (Oregon)	35.165.254.91	35.162.215.209	44.237.120.142	35.82.168.81	44.224.210.116
ap-southeast-1 (Singapore)	13.228.68.164	13.228.227.43	18.139.119.138	18.138.220.132	13.213.152.214
ap-southeast-2 (Sydney)	54.79.79.53	52.65.48.104	54.66.111.206	54.79.31.206	3.105.71.152
ap-northeast-1 (Tokyo)	52.198.62.54	13.113.146.65	35.74.188.226	54.65.210.219	35.74.101.7
ca-central-1 (Canada)	35.182.98.19	52.60.156.23	3.97.93.96	3.98.50.62	15.222.204.49
eu-central-1 (Frankfurt)	35.156.155.92	35.156.109.86	35.158.91.72	3.67.150.192	18.158.179.99
eu-west-1 (Ireland)	52.211.90.91	52.214.90.84	52.212.166.176	54.247.7.102	52.211.87.230
sa-east-1 (Sao Paulo)	18.231.13.112	54.207.6.242	177.71.235.129	18.230.38.62	18.229.128.2

Custom SMTP IPs

Allow traffic to the listed connections to your on-premises SMTP servers.

ShareFile to Client SMTP Servers (US)

CIDR Notation	IP Address	Netmask
23.22.155.226	23.22.155.226	255.255.255.255
52.54.27.154	52.54.27.154	255.255.255.255
52.54.27.2	52.54.27.2	255.255.255.255
34.192.163.240/32	**34.192.163.240**	**255.255.255.255**
18.233.29.44/32	**18.233.29.44**	**255.255.255.255**

ShareFile to Client SMTP Servers (EU)

CIDR Notation	IP Address	Netmask
52.59.39.187	52.59.39.187	255.255.255.255
52.59.36.111	52.59.36.111	255.255.255.255
52.59.4.117	52.59.4.117	255.255.255.255
35.156.155.92/32	**35.156.155.92**	**255.255.255.255**
35.156.109.86/32	**35.156.109.86**	**255.255.255.255**

HIPAA Support

March 21, 2024

Overview

The Health Insurance Portability and Accountability Act of 1996, or "HIPAA,"is a U.S. federal law that required the creation of national standards to protect patient health information. This includes, for example, obligations around the confidentiality and security of such data.

Cloud Software Group, Inc. ("ShareFile") supports these obligations when storing and sharing data, and provides various tools to supplement a customer's compliance efforts under HIPAA. However, it is the customer's responsibilty to configure and operate its ShareFile environment appropriately. Additionally, ShareFile is not a substitute for a customer's broader compliance obligations. Customers must have their own an adequate HIPAA program, along with appropriate processes and controls to ensure compliance throughout their organization.

Adding ShareFile with HIPAA Support

ShareFile with HIPAA support is available only with a ShareFile Premium Account. Additionally, customers must accept the ShareFile Business Associate Agreement (BAA). In such case, ShareFile operates as a "Business Associate" of customer, generally a "Covered Entity." For more information on these roles, visit The U.S. Dept. of Health and Human Services.

Accepting the Business Associate Agreement

New accounts

A ShareFile customer's administrator can accept the BAA upon activation of their Premium Account . Once the account is set up and the required account details are completed, the BAA acceptance prompt will be displayed. Administrators can view and accept the BAA before accessing the customer's ShareFile environment.

Existing accounts

Once a ShareFile account is converted to a Premium Account with HIPAA support, administrators can click on Admin Setting -> Admin Overview page, within their ShareFile account. A statement regarding BAA acceptance will be highlighted where the BAA can be reviewed and accepted directly within the account.

Administrators can access and review their executed ShareFile BAA at any time via the same Admin Overview page.

HIPAA Features

Upon in-product acceptance of the ShareFile BAA, customers can immediately feel confident using ShareFile to process protected health information (PHI) in the HIPAA-supported version of their ShareFile account. Not only do world-class security measures come standard in our products, ShareFIle also automatically adjusts various features to help support customer's enhanced obligations under HIPAA.

- **Public share links** - To prevent customers from inadvertently sharing PHI publicly, this feature is disabled. Administrators may enable this feature.

- **Co-edit with Microsoft** - This feature requires customer data to be transferred to your Microsoft environment. ShareFile does not have an agreement with Microsoft and cannot control what happens to your data once it leaves ShareFile's system. Administrators may enable this feature.

- **3rd Party integrations and connectors** - This feature requires customer data to be transferred to your environment which is hosted by a third party provider of the integration or connector. ShareFile does not have an agreement any third party providers of integrations or connectors, and cannot control what happens to your data once it leaves ShareFile's system. Administrators may enable this feature.

- **Notifications** - Activity notifications (view/download/upload) will not include the file name went sent via email. This is to prevent sharing of PHI that may be inadvertently contained in a file name. Such notifications will include the file type extension (ex: .doc, .pdf)

Additionally, the following products are not supported for HIPAA product plans:

- **On Prem or "Self-hosted"** - ShareFile does not have access to PHI when customers deploy an on-premises version of the product. For this reason, ShareFile cannot act a business associate of the customer.

- **Customer Managed Encryption Key for Cloud Storage** - ShareFile does not have direct access to PHI where product encryption keys are maintained by the customer. For this reason, ShareFile cannot act a business associate of the customer.

- **Request Lists** - This feature is not currently supported for HIPAA accounts.

- **Custom Workflows** - This feature is not currently supported for HIPAA accounts.

Integrations

April 1, 2024

ShareFile allows you to eliminate manual data entry by automatically syncing prospective client data with various third-party software packages.

The integration allows users to connect ShareFile to these applications and automate the flow of information between the two platforms without the need for coding.

Browse integrations in the ShareFile Catalog

Use the following instructions to download third party integrations from the ShareFile Catalog.

1. Open ShareFile in your web browser.

2. Select **Catalog** from the menu.

The ShareFile **Catalog** page opens in a new tab.

3. Select **Install** by the integration that you require.

4. Select **New Connection**.

   The **Create connection** screen displays.

5. Type in a name for the connection.

The third party application opens in a new tab.

6. Sign into the application.

7. Follow the prompts to connect the application to ShareFile.

Tasks

Select from the list of tasks below to use the application you use to sync with ShareFile.

Import customer/client information

- QuickBooks - allows you to add Quickbook customers to your ShareFile account.

- Salesforce - allows you to add Salesforce Leads to your ShareFile account

Export to an application from ShareFile

You can export files from folders to third-party solutions saving time, reducing errors, and streamline your workflow.

- FreshBooks

- QuickBooks

- Pipedrive

- Salesforce

- Xero

Export ShareFile files to integrated applications

April 8, 2024

ShareFile export integrations allow users to export files to a connected third party application saving time, reducing errors, and streamline your workflow. File export works from both your projects and folder files.

We currently offer export ability with the following products:

- FreshBooks

- QuickBooks

- Pipedrive

- Salesforce

- Xero

> **Note:**
>
> If this is your first time using integrations, select **Browse Integrations** to access the **Catalog**. See
> Browse integrations in the ShareFile Catalog for more information.

FreshBooks
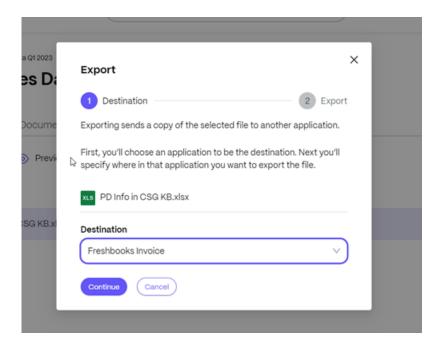
Use the following instructions to export files to Freshbooks from ShareFile.

1. In ShareFile, navigate to the **Project** > **Files** tab or to a specific ShareFile Folder.

2. Select one or more files.

3. Select **Export**.

4. Choose **Destination** to specify the third-party system where the files are exported.

5. Select **Continue** to start the export to Freshbooks.

   Files might take a few minutes to show up in the third party tool depending on the size and the number of files exported.

Pipedrive

Use the following instructions to export files to Sage from ShareFile.

1. In ShareFile, navigate to the **Project** > **Files** tab or to a specific ShareFile Folder.

2. Select one or more files.

3. Select **Export**.

4. Choose **Destination** to specify the third-party system where the files are exported.

5. Select **Continue** to start the export to Pipedrive.

   Files might take a few minutes to show up in the third party tool depending on the size and the number of files exported.

QuickBooks

Use the following instructions to export files to QuickBooks from ShareFile.

1. In ShareFile, navigate to the **Project** > **Files** tab or to a specific ShareFile Folder.

2. Select one or more files.

3. Select **Export**.

4. Choose **Destination** to specify the third-party system where the files are exported.

Files might take a few minutes to show up in the third party tool depending on the size and the number of files exported.

Salesforce

Use the following instructions to export files to Salesforce from ShareFile.

1. In ShareFile, navigate to **Project** > **Files** tab or to a specific ShareFile Folder.

2. Select one or more files.

3. Select **Export**.

4. Choose **Destination** to specify the third-party system where the files are exported.

Files might take a few minutes to show up in the third party tool depending on the size and the amount of files exported.

Xero

Use the following instructions to export files to Xero from ShareFile.

1. In ShareFile, navigate to the **Project** > **Files** tab or to a specific ShareFile Folder.

2. Select one or more files.

3. Select **Export**.

4. Choose **Destination** to specify the third-party system where the files are exported.

Files might take a few minutes to show up in the third party tool depending on the size and the number of files exported.

ShareFile apps and integrations

February 15, 2024

ShareFile integrates seamlessly with the software you love so you can automate document workflows, securely send files, and sync work across all your devices. For informations on downloads and more integration information, see Integrate ShareFile with your favorite apps.

With your ShareFile account and apps, you can:

Access:

- Access files and folders located in your ShareFile account.
- Edit files located in your ShareFile account (not available on all plans).
- Download and upload files between your ShareFile account and your local device.
- Sync files in your ShareFile account from all of your devices.

Share:

- Share or sync multiple files with multiple users at once.
- Request files and provide secure links for recipients to upload files to your ShareFile account.

Manage:

- Set custom access permissions to files and folders for individual users.
- Specify a passcode for additional protection for your ShareFile account.
- Add users to existing folders in your ShareFile account.

Integrate:

- Use ShareFile by integrating with your favorite operating system both on your desktop and mobile.

- Use third party integrations using Microsoft 365, Google Workspace, Zapier, and Scrypt Sfax.

- Utlize our app catalog for:

    - Integrating Quickbooks

    - Integrating SalesForce

Supported languages

ShareFile supports the following languages:

- Dutch

- English

- French

- German

- Japanese

- Portuguese

- Spanish

ShareFile Web

May 5, 2023

ShareFile is a file sharing service that enables users to easily and securely exchange documents.

ShareFile helps you exchange files easily, securely and professionally with secure data sharing and storage, customizable usage and settings, and tools that allow you to collaborate more easily and get your work done.

For information about new features, see What's new.

System requirements

ShareFile is accessible by any computer with a supported web browser and an internet connection. In order to utilize all features and functions of the ShareFile web application, we recommend the following browser types:

- **Microsoft Edge** - Latest version

- **Mozilla Firefox** - Latest version

- **Google Chrome** - Latest version

- **Apple Safari** - Latest version

   > **Note:**
   >
   > Due to issues with displaying certain folders and menus, the ShareFile web application may not be accessible via Safari in **Private Browsing** mode.

Fixed issues

Fixed issues in 22.0615

- Expiration dates for uploaded files might not update correctly when using **Get A Link**. [SFWEB-13309]

Fixed issues in 21.1210

- File details might not display for some uploaded files. [SFPLATFORM-14977]
- Moving files using Citrix Files for Windows might cause an error. [SFPLATFORM-15008]
- Attempts to save account preferences might fail. [SFWEB-13173]

Fixed issues in Files 21.1007

- File requests might fail when invalid recipients are included. [SFPLATFORM-14852]

Fixed issues in 21.0813

> **Note:**
>
> Releases for Files in Citrix Workspace now incorporate the date into the release version number. Multiple releases are provided at the end of the week.

- Clients created in some Content Collaboration acounts might not receive an activation email. [SFPLATFORM-14323]

Fixed issues in 21.26

- Attempts to link Cloud licenses might cause Premium Plan customers to lose electronic signature capability. [SFPLATFORM-14198]
- Bounce notifications might not be received after Welcome Emails are sent to bad addresses. [SFPLATFORM-14208]
- Attempts to change the account wide retention policy might fail. [SFWEB-13094]
- When uploading an updated file with the same name but different case, the correct versioning of the file might fail. [SFWEB-13095]

Fixed issues in 21.22

- Attempts to copy files in the same storage zone might fail. [SFPLATFORM-14183]
- Attempts to delete files or folders created by the user might fail. [SFPLATFORM-14177]

Fixed issues in 21.21

- Attempts to update your account with a new credit card might fail. [SFWEB-13080]

Fixed issues in 21.20

- Attempts to send an encrypted email in the WebApp or Citrix Files for Outlook might fail. [CCCHELP-524]

Fixed issues in 21.14

- Accessing .mp4 files might not trigger a notification to the file owner. [SFPLATFORM-13955]
- When you enable restricted sharing for connectors, you might lose the ability to edit link options. [SFWEB-12728]
- Some .jpg files do not display correctly in preview. [SFWEB-13040]

Fixed issues in 21.9

- The download access setting might display the option of "29 days" in error. [SFWEB-13024]

Fixed issues in 21.4

- During parallel syncs, attempting to pause a multiple file upload might not work. [SFWEB-12983]

Fixed issues in 21.1

- This release addresses several issues that help to improve overall performance and stability.

Known issues

Known issues in 21.1

No new issues have been observed in this release.

Known issues in 20.31

No new issues have been observed in this release.

Known issues in 20.30

No new issues have been observed in this release.

Accelerated Agreements

September 8, 2023

Accelerated Agreements is a feature for ShareFile Premium users to improve their client onboarding process. This feature reduces onboarding cycle time.

Other benefits of the feature include:

- Send one-click agreements
- Automated client onboarding experience
- Send agreements for signature inside ShareFile
- Create and use agreement templates in ShareFile
- Auto-fill Agreement templates, see Create auto-fill agreement templates.
- Use automated workflows to track progress, see Automated Workflows for more information.

> **TIP:**
>
> For **Salesforce Leads** and **Quickbook Customers**, see Integrations for steps on how to add prospective client data from these tools.

Prerequisites

- Must have a ShareFile Premium account
- Employee user must have an Admin assigned RightSignature account.

One-click agreements

Accelerated agreements in ShareFile allow to send one-click agreements for existing clients.

Send one-click agreements

1. From your ShareFile dashboard, navigate to **People** > **Browse Clients**.

2. Select the current client from the list by checking the box next to their name.

3. Select **Send Client Agreement**.

4. Once the **Preview - Client agreement** displays, review the information then select **Send**.

The "**Client agreement successfully sent.**"confirmation message displays.

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Automated client onboarding

Adding a new prospective client

1. In your ShareFile Premium account, navigate to **People** > **Prospective Clients** to open the **Browse Prospects** screen.

2. Select **Add Prospect** then complete the form.

3. Select **Add**. The **Prospective client added successfully banner** displays.

4. Select the new prospect from the list by checking the box next to their name.

5. Select **Send Client Agreement**. The **Select a template** screen displays.

6. Choose the template that you want to use for the selected client. For more information, see Create auto-fill agreement templates.

7. Review the auto-filled template on the **Preview - Client Agreement** screen then click **Send**.

The prospective client receives a **Review & Sign Document** request email from your ShareFile account. Once they complete the form, they click **Submit**. The **Document Signature Completed** screen displays. They're asked to check their email to activate their account.

Once the client activates their ShareFile account access, they can sign into ShareFile and view their signed agreements.

The employee is notified that the client has completed the agreement and can review it in ShareFile.

A folder is created under the client's name and is automatically shared.

Automated existing client workflow

1. In your ShareFile Premium account, navigate to **People** > **Browse Clients**.

2. Select the client from the list by checking the box next to their name.

3. Select **Send Client Agreement**. The **Select a template** screen displays.

4. Choose the template that you want to use for the selected client. For more information, see Create auto-fill agreement templates.

5. Review the auto-filled template on the **Preview - Client Agreement** screen then click **Send**.

The prospective client receives a **Review & Sign Document** request email from your ShareFile account. Once they complete the form, they click **Submit**. The **Document Signature Completed** screen displays. They're asked to check their email to activate their account.

The client can sign into ShareFile and view their signed agreements.

The employee can track the status of the client's activity in the **Automated Workflows** dashboard. See Automated Workflows for more information.
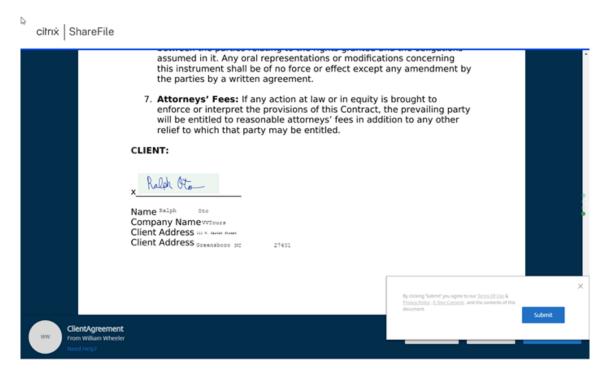
Client side agreement completion

As a recipient of an accelerated agreement, use the following steps to complete the signature and document request process.

1. Check your email for the document or signature request.
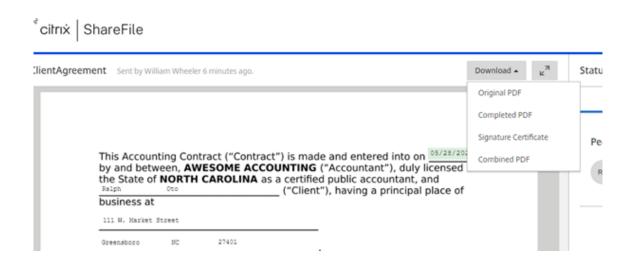
2. Select **REVIEW & SIGN DOCUMENT** to access the document.

3. After completing the request, select **Submit signature** then confirm by selecting **Submit**.

The **Document Signature Completed** popup displays confirming your submission and asks you to check your email to activate your account.

4. You have the option to download the document from the **Download** dropdown list.

Advanced Connections

January 30, 2024

ShareFile is compatible with FTP clients including WS-FTP or FileZilla. You can also connect to your ShareFile account using a WebDAV client.

Use your **FTP** or **WebDAV** settings by going to **Settings** > **Personal Settings** > **Advanced Connections**.

FTPS Support

ShareFile supports FTPS transfers.

- SFTP is not currently supported.

> **Notes:**
>
> - ShareFile acts as an FTP server and **not** as an FTP client. ShareFile does not automatically integrate with other FTP sites and servers directly.
> - If you have Two-step verification, please generate an Application Specific Password to connect to FTP using your login information.

Port Requirements

- You can connect to ShareFile using an implicit SSL/TLS connection (port 990).

- When an FTP client connects to ShareFile, they will be using an outbound port in the range of 32768-57344. To enhance security, the connection randomly switches port numbers within this large range.

- For information on ShareFile IPs, see Domain inclusion list.

- Finding the IP of my server - You can find the IP of your account's assigned FTP server using the "ping yoursubdomain.sharefileftp.com"command in the Windows Command Line menu. You can find your FTP server name within your ShareFile account under **Personal Settings** > **Advanced Connections**.

Limitations

- A user can have 8 simultaneous connections. Attempting any more connections will result in an error. If you cannot close connections, you may do so by closing your FTP client.

- Move and Copy functions are not supported. Changes made in this manner will not be reflected in the ShareFile web app.

- ShareFile does not support the Rename function when moving files.

- This feature does not support company credentials.

- This feature is not currently available for data on customer-managed StorageZones.

- This feature is not compatible with VDR accounts using the view-only feature.

Enabling external tools

Go to **Admin Settings** > **Enable ShareFile Tools** > **External Tools** to select **FTPS Access** and **WebDAV Access**.

Advanced Connections for FTP Settings

You can connect to ShareFile using an implicit SSL/TLS connection (port 990). For security, ShareFile only supports secure FTPS transfers, which are sent over SSL/TLS, and not SFTP transfers, which are sent over SSH.

ShareFile FTP login and server information can be found in the ShareFile web app. Navigate to **Personal Settings** > **Advanced Connections** > **FTP Settings**.

In your FTP client or etc., enter the following FTP Server Information:

Security: Implicit SSL/TLS (Port 990) Required
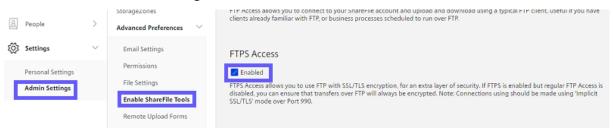
FTP Server: yoursubdomain.sharefileftp.com (If your account is mycompany.sharefile.com enter my-company for the subdomain).

User name: yoursubdomain/youremailaddress

Password: (your ShareFile password or your FTPS application specific password)

If FTP Settings are not present, an Admin on your account can enable this feature within the External Tools menu in the Admin Settings section of their account.

Configuration examples

The following recommended setups have been verified by ShareFile Support.

> **Note:**
>
> Use of these clients with settings not listed here may not be fully supported.

FileZilla for Windows and Mac

1. Select **File**.

2. Select **Site Manager**. A new window will pop up.

3. Select **New Site** and set it up as follows:

   - Name the connection. e.g. 'ShareFile'

   - Host - Server address

- Server Type - For FTP, select Regular FTP. For FTPS, select Require implicit FTP over TLS.

- Login Type - 'Normal'

- User - Enter username in format subdomain/email address

- Enter Password - ShareFile account password

4. Click on the Transfer Settings tab

5. Select **Passive Mode**.

6. Select **Connect**.

Ipswitch FTP

1. Select **File**.

2. Select Connect

3. Select Connection Wizard

4. Name the connection - e.g. 'ShareFile'

5. Connection Type –> Regular FTP: Select 'FTP' from drop down. Secure FTP: Select 'FTP/Implicit SSL' from drop down

   - Enter Server Address
   - Enter user name
   - Format of 'subdomain'/'email address'
   - Enter Password
   - ShareFile account password

6. Select on the **Advanced** button.

7. Select the **Advanced** tab on the left.

8. Ensure the check box for **Use Passive mode for data connections** is selected.

9. Select OK to finish.

Cute FTP

1. Select the **File** drop-down menu

2. Select **New** > **Regular FTP**: Select 'FTP' from drop down. Secure FTP: Select 'FTP/Implicit SSL' from drop down

   A new window will pop up

- Label - A connection name, e.g. 'ShareFile'

- Host name - Server address

3. Enter user name - Use format of subdomain/email address

4. Enter password - ShareFile account password

5. Select **Login method** - Normal

6. Select **Type**.

7. Under the Data connections type select: Use PASV

8. Select the **Connect** button.

Smart FTP

1. Select **File**.

2. Select **New Remote Browser**.

- Protocol - Regular FTP: Select 'FTP' from drop down. Secure FTP: Select **FTP** over **SSL Implicit**.

- Host - Server address

- Enter user name - Format of 'subdomain'/'email address'

- Enter Password - ShareFile account password

3. Name the connection - e.g. 'ShareFile'

4. Click on the Properties button

5. Highlight the Connection tabc.

6. Under Data Connection and Mode, select **Passive Mode**

7. Select **OK**.

Cyberduck for Mac

1. Selectthe Open Connection icon

2. Select Protocol: FTP

3. Select Server - Server address

4. Enter username - Format of subdomain/email address

5. Enter password - ShareFile account password

6. Select the **More Options** button

7. Select **Connect Mod** then **Passive**.

8. Select **Connect**.

AI-assisted secure share recommender

April 24, 2024

The secure share recommender is a premium feature that uses AI to enhance data security. When a user creates a public Share link or shares a file with specific people via email, ShareFile analyzes the file's name and content for various Personal Identifiable Information (PII) elements and if PII is detected, recommends users to apply more secure options. If the user accepts the recommendations, the recommended options are automatically applied to the link.

> **Note:**
>
> ShareFile does not use the file content and any PII that is detected therein to train underlying AI/ML technologies. PII elements cannot be detected for images, videos, compressed, password-protected, or encrypted files.

List of PII that are detected:

Personal information	Financial information	Digital access credentials	Geolocation data
Social Security Number	Credit/Debit Card Information (Card Number, CVV, Expiry Date) and PIN	Username	IP Address
Passport Number	International Bank Account Number (IBAN)	Password	MAC Address
Drivers License Number	Bank Account Number	AWS Access Key	
Vehicle Identification Number (VIN)	Individual Tax Identification Number (ITIN)	AWS Secret Key	
License Plate Number	CA Health Number	URL	

Personal information	Financial information	Digital access credentials	Geolocation data
National Identification Numbers *	CA Social Insurance Number		
Name	Bank Routing Number		
Address	PIN		
Age	Swift Code		
Email			
Phone Number			

*Table note for above

National Identification Numbers: Aadhaar, NREGA, Permanent Account Number, Voter Number, UK National Health Service Number, UK National Insurance Number, UK Unique Taxpayer Reference Number.

Create a Share link
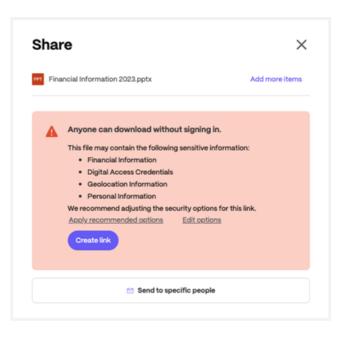
Use the following steps to create a Share link and secure it by applying the AI-assisted recommendations.

1. Navigate to the file that you want to share and select it.

2. Select **Share** from the menu.

   The file content is automatically analyzed for sensitive information.

   If PII is detected, users are shown the recommendation. Recommended options can be applied with a single click or can be manually changed using Edit options.

3. Select **Copy** to share the link with recipients.

Send to specific people

Use the following steps to share a file with specific people via email and secure it by applying the AI-assisted recommendations.

1. Navigate to the file that you want to share and select it.

2. Select the file that you want to share.

3. Select **Send to specific people**.

   The file name and content is automatically analyzed for PII elements. If PII is detected, users are shown the recommendation. Recommended options can be applied with a single click or can be manually changed using Edit options.

4. Type in the email address of the recipient in the **To** field.

5. Though the **Subject** is prefilled, you can type in replacement text.

6. Type in a message if necessary.

7. Click the **Remember subject and message** check box if needed.

8. Select **Send**.

The **Share sent successfully** message displays briefly.

Edit options

Use **Edit options** to configure various settings such as who can access the shared files, the expiration date for the link, notification options, and other options.

- **Access options**:

– **Allow people with this link to**: - allows you to configure the actions that recipients can take with the shared files.

– **Who can access this link** allows you to configure the recipients that can access the shared files using the link and whether they'll need to sign into ShareFile to access them.

* **Anyone (public)** - Anyone with the link can access the shared files and see the content.

* **Anyone (public, must enter name and email)** - Anyone with the link can access the shared files and see the content after entering their name and email. Beware that ShareFile does not verify the recipient's identity in this option. A bad actor with the link could maliciously use a client or an employee's name/email to access the file content, and the sender will not be alerted.

* **Client and employee users(after signing in)** - The recipients must sign in using their ShareFile credentials to access the content. If the recipients are not existing users in the account, that is, if they are not added as an employee or as a client user, then they won't be able to sign in and access the content. Make sure you create user accounts for the recipients before sharing the files.

* **Employee users (after signing in)** - The recipients will need to sign in using their ShareFile credentials to access the content. If they are not added as an employee user, they won't be able to sign in and access the content. Ensure you create user accounts for the recipients and add them as employees before sharing the files.

– **Access expires** - select from various expiration settings for recipients.

– **Always link to the latest version of the file** - Use this option to share the latest version of the shared files automatically. That is, if you make changes to the files after sharing them, the recipients can see the latest changes. Turning this off will only provide access to the current version of the shared files, and recipients will not have access to any future changes to the shared files.

– **Add a watermark** - If this option is turned on, a watermark is added to supported file types.

Notification options

- **Notify me when this is accessed** - If this option is turned on, you will receive an email notification when the link is accessed.

- **Send me a copy of this email** - If this option is turned on, you will receive a copy of the email that is sent.

Disabling the secure share recommender

If an administrator chooses to disable the AI-assisted secure share recommender feature, they can do so from the **Admin Settings** > **Advanced Preferences** > **File Settings** > **Share Settings** section.

FAQs

Does ShareFile use or store any of my data for its AI capabilities?

No, ShareFile does not use the file content and any PII detected therein to train underlying AI/ML technologies.

What are the file types that are supported?

Supported file types are text, PDFs, and Microsoft Office files. PII elements cannot be detected for images, videos, compressed, password-protected or encrypted files.

Are there file size restrictions?

Yes, files larger than 20 MB are not scanned for recommendations.

Video: AI-assisted secure share recommender

The following one minute and 41 seconds video provides the information on how to effortlessly share secure files with AI-powered secure share recommender in ShareFile.

This is an embedded video. Click the link to watch the video

My Apps & Devices

May 1, 2023

The **My Apps & Devices** allows you to do the following:

- Review devices used to connect to your ShareFile account.

- Lock a user's device.

- Wipe a user's device.

- Revoke a user's device.

Using Lock

Lock a user's account from a device to prevent the user from accessing the ShareFile data on it.

To lock a device, use the following steps.

1. Select the device you want to lock.

2. Select **Lock**.

3. Select **Continue** to confirm the locking of the device.

Using Wipe

Wipe a user's account from a device to remove the ShareFile data from it the next time the device connects to the account.

To wipe a device, use the following steps.

1. Select the device you want to wipe.

2. Select **Wipe**.

3. Select **Continue** to confirm the wiping of the device.

Using Revoke
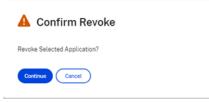
Revoke a user's saved credentials and remove the device from the list.

To lock a device, use the following steps.

1. Select the device you want to revoke.

2. Select **Revoke**.

3. Select **Continue** to confirm the revoking of the device.

Create auto-fill agreement templates

October 2, 2023

Accelerated Agreements is a new feature that allows you to create auto-fill agreement templates to automate the prospective client onboarding experience.

> **TIP:**
>
> For **Salesforce Leads** and **Quickbook Customers**, see Integrations for steps on how to add prospective client data from these tools.

Use the instructions below to create auto-fill templates.

Instructions

1. In your ShareFile Premium account, navigate to **People** > **Prospective Clients** to open the **Browse Prospects** screen.

2. Select an existing Prospect or click **Add Prospect**. For more information on adding a prospect, see Accelerated Agreements.

3. Select the new prospect from the list by checking the box next to their name.

4. Select **Send Client Agreement**. The **Select a template** screen displays.

5. Select **Create a Template**. The **Upload** screen displays.

6. Select **Upload a File** to browse for a document in your system or select **Choose from Cloud**.

7. Once the document template is displaying in the **Prepare** template screen, use the right pane to expand the **Data Fields** for Prospect. Customize the template utilizing the data fields.

8. Select **Create Template** to save the template.

> **Notes:**
>
> - The template is created under the filename of the document uploaded.
>
> - The template is saved under your RightSignature account and is available for any future agreements.
>
> - Templates can be edited or deleted under the RightSignature Templates screen.

9. Use the **Preview - Client Agreement** screen to review. If correct, select **Send**.

The client will receive and email requesting action.

Automated Workflows

February 14, 2024

Automated Workflows in ShareFile allow you to set up automation for common business workflows, repetitive tasks, and client outreach processes. It also enables you to easily track and manage the progress of accelerated agreements. See Accelerated Agreements for more information.

Prerequisites

- Must have a ShareFile Premium account

Tracking My workflows

The **My workflows** dashboard allows you to review and manage all the workflows created in your account.

ShareFile

My workflows descriptions

Column	Description
Name	Workflow name
Last updated by	Last employee to edit the workflow
Active	Use this toggle to Enable / Disable a workflow.
View runs	Select **View runs** to see the **Run history**.
Start	Select **Start** to initiate a new workflow run for the specific workflow.
Vertical ellipses	Select to check for more Options: **Preview** / **Edit** / **Delete**

> **Note:**
>
> **Edit** and **Delete** options are only visible for workflows where you have edit access.

Run history

This screen displays the details of the agreement workflow.

ShareFile

Run history descriptions

Column	Description
Name	Workflow run name.
Started	Initial start time for the workflow run.
Triggered by	Name of employee who started the workflow.
Last updated	Latest activity time.
Status	Current status of the workflow.
Vertical ellipses	Select to view the Run history details or to cancel a flow that is In progress.

Run history details

Run details provides you with an up to date status on where your automated workflow stands in the process. It includes the date and time for all actions up to the end of the defined process.

Tracking My Accelerated Agreements Workflows

Prospective client   When initiating an agreement for a prospective client, you can track the work-
flow runs by going to **Automated Workflows** > **My Workflows**. Select **View runs** for the workflow
named "Accelerated Agreements for Prospects."

You are directed to the run history specific to this workflow. Each run highlights the name of the
prospective client specific to it:

> **Run name:** *Agreement for Prospect - Prospective Client's last name, first name*

Existing client When initiating an agreement for an existing client, you can track the workflow runs by going to **Automated Workflows** > **My Workflows**. Select **View runs** for the workflow named "Accelerated Agreements for Clients."

You are directed to the run history specific to this workflow. Each run highlights the name of the client specific to it:

> **Run name:** *Agreement for Client - Client's last name, first name*

Tip:

Once you are in the Run History for either of these workflows, you can track the workflow runs by checking the run status and run details. You also have the ability to cancel a run if needed. Refer to the Run history section for more information.

Creating an Automated Workflow

Use the following steps to create a new automated workflow.

1. Navigate to **Workflow** > **Automated Workflows** to open the dashboard.

2. Select **Add**. The workflow designer window displays.
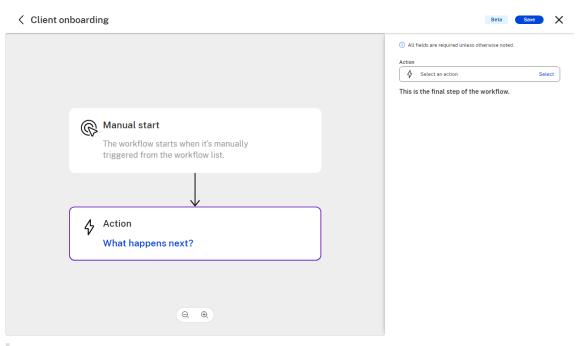
3. Under **Properties**, type in a name for your new workflow in the corresponding field. This is the name of the workflow that appears in the **Automated Workflows** dashboard once completed. You can add an optional description in the field below the name.

4. Select **Save**.

5. Select the **Starts when...** button on the Automated Workflow designer screen. This opens the **Action** editor.

Note:

The defaults for "What triggers this workflow?"and "Where can this workflow be triggered?"are set to **Manual start** and **Workflow list** for now. There will be added functionality to the trigger presets in future releases.

6. Select **Action** to request the necessary information for the user running this workflow.

Tips:
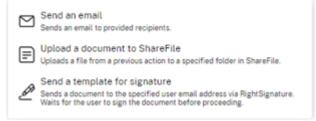
- Variables are typically information that would need to change for every workflow run and cannot be set as a constant value in the workflow configuration.

- These variables are referred to later in one or more actions of this workflow.

- You can add multiple actions, set them as either required or optional for workflow run execution, or delete them.

7. Select the **Action** button on the Automated Workflow designer screen or the **What happens next?** link. This opens the **Action** editor. Select the required **Action category**. You can add multiple actions to a workflow with each action pertaining to a single action category.

   > **Note:**
   >
   > We currently have three action types. There will be added functionality to the automated action library in future releases.

8. Select **Send template for signature**. This opens the **Action Category** description screen and in the flow, explains what is needed.

   > **Note:**
   >
   > This action uses our native e-signature integration via RightSignature. So you must have RightSignature access to configure and use this action successfully.

9. You can choose an existing template or create a template. In this step, we select an existing template.

   > **Note:**
   >
   > For information on creating a template, see Create auto-fill agreement templates.

Note:

If the selected template has data/merge fields, then you get the option to "Set data fields" to choose values to be auto-filled in the template.
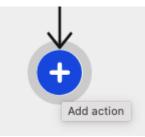
10. For the **Recipient Email Address**, you have the option to either add a constant value or choose a variable by clicking on the **Add variable** link.

Note:

Since recipient addresses would ideally be different for each workflow run, you can click on the + Add variable link next to the email field. This will give you the option to choose from the list of all Trigger Variables you added in the Trigger section. If you did not add any Trigger variable or do not find the appropriate variable on the list, you can anytime go back to the Trigger section to add another appropriate variable.

11. After successfully configuring one action, you can choose to either save the workflow and exit or add more actions.

12. Select the blue **+** sign to add another action.

13. If you choose the **File** action category, you get to choose the exact action type available under the File action category.

14. Select **Upload a document to ShareFile**. This opens the **Action Category** description screen and in the flow, explains what is needed.

This is the final step of the workflow.

15. For **File to Upload**, if you have an action prior to this step in the workflow that generates a file, you can select that file as a reference by clicking on **+ Add variable**. For example, if you have used a signature action prior to this step, then the Signed Document will be available as a variable here.

16. For **File Name** you either enter a constant file name for every workflow run or choose a variable name. If you need a different file name for every different run of this workflow, click on the **+ Add variable** link next to the **File name** field. This will give you the option to choose from the list of all Trigger Variables you added in the Trigger section. If you did not add any Trigger variable or do not find the appropriate variable on the list, you can anytime go back to the Trigger section to add another appropriate variable.

17. Select a Folder from your ShareFile folder structure to be configured as a Destination Folder for this workflow action.

18. Verify your selections on the right. After successfully configuring this action, you can choose to either save the workflow and exit or add more actions.

    Select the blue **+** sign to add another action. Or, select **Save** and then **X** to exit the workflow designer screen.

ⓘ All fields are required unless otherwise noted.

Action

📄	Upload a document to ShareFile	Change

ⓘ Users will need access to this folder to run the workflow.

Description

Upload a document to ShareFile

File to upload

Select a file referenced earlier in the workflow or paste the URL of a new one. It'll upload as a PDF when the workflow runs.

Signed Document ✕	⊕ Variable

File name

You can use variables if you want to customize the file name for each run.

Signed Document ✕	⊕ Variable

Upload location

📁	Personal Folders Personal Folders	Change

This is the final step of the workflow.

19. Select **Save**.

‹ Request Signature Form   [Save]   ✕
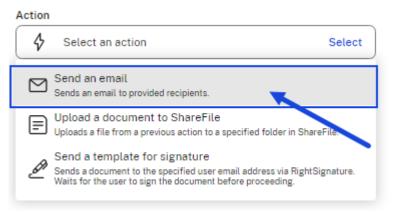
The new automated workflow is available to use from the **Automated Workflows** dashboard. If it is not set as "Active", you can toggle it to enable the workflow before starting it.

Action variable descriptions

Send an email action   Use the **Send an email** action to trigger automatic emails to clients when using accelerated agreements in ShareFile

1. When in the **Select an action** field, select the **Send an email** action.

The variable fields screen dsiplays for the **Send an email** action.

2. Complete the following variable fields:

- **Description** (optional) - provide a description if desired.
- **Recipients** - enter one email address per field. You can also add CC recipients and BCC recipients (both are optional).
- **Email subject** - add a subject to be used for the email action.
- **Email content** - provide information regarding purpose for the email.
- **Add reply to recipient** (optional) - use to select people to receive any replies sent by the recipient.

3. Select **Save** to complete the settings for the **Send an email** action.

Video: Automated Workflows

The following 3 minute and 14 seconds video provides how to increase efficiency of your workflows with ShareFile.

This is an embedded video. Click the link to watch the video

Co-editing in ShareFile

April 24, 2024

This article explains the steps necessary to co-edit and share editable links from your ShareFile account. This allows your recipients to make edits to your Microsoft Office files.

Add a place for direct access to Microsoft Office applications in Mac or Windows

Use the information provided for either Mac or Windows to add a place for direct access to your Microsoft Office account.

- **ShareFile for Mac** - see Add a place for more information.

- **ShareFile for Windows** - see Add a place for more information.

Supported Microsoft Office 365 Plans

- Microsoft 365/Office 365 E3
- Microsoft 365/Office 365 E4
- Microsoft 365/Office 365 E5

See Microsoft 365 and Office 365 plan options for more information.

ShareFile user requirements for co-editing

This feature is available to both employee and client users so long as the following requirements are met:

- **Previewing files** - Download permission must be enabled on the folder where the file is stored.

- **Editing Files** - The following requirements are necessary to edit files in ShareFile:

  – Must have a Microsoft Office 365 Commercial license.
  – Upload and download permissions on the folder where the file is stored.
  – File **Versioning** is enabled.

> **Note:**
>
> Co-editing is not supported with the ShareFile FINRA Archiving plan or ShareFile Enterprise Archiving plan because of limitations around file versioning within the archiving plans.

Enable Office Online Editing - ShareFile-Managed Storage

For customers using ShareFile-managed storage (customers not using on-prem storage) - This feature is enabled by an Administrator user on the account.

> **Disclaimer:**
>
> By enabling this feature, you are confirming that you have reviewed and agreed to the Microsoft Terms of Use and Privacy Policy linked. The **Preview** option is required for editing.

File type requirements

Microsoft requirements file type requirements for editing.

Application	Previewing Files	Editing Files
Word	.doc .docm .docx .dot .dotm .dotx .odt	.docm .docx .odt
Excel	.xls .xlsm .xlsb .xlsx	.ods .xlsb .xlsm .xlsx
PowerPoint	.odp .pot .potm .potx .pps .ppsm .ppsx .ppt .pptm .pptx	.odp .ppsx .pptx

Limitations and known issues

- This feature is subject to Microsoft Known Issues and Limitations.

- The editing feature is not compatible with HIPAA Cloud, Archiving, and VDR accounts.

- To ensure your file is saved, ensure that "Saved to ShareFile"is indicated at the bottom of the editor before exiting.

- Currently, you must refresh your ShareFile folder after editing a file to access or preview the updated version.

- Once you select the **Edit** option, do not attempot to select **Edit** again while the new tab is loading. This could register as a concurrent access attempt and cause an error in accessing the file.

- **Preview** and **Editing** for private zones can be enabled or disabled via the settings in the storage zones controller configuration only. These are enabled only at the zone level and are independent of any Admin settings in the web application.

- For multi-tenant zones: This setting is enabled/disabled at the multi-tenant zone level and would therefore impact all tenants. It cannot be enabled/disabled on a per tenant level.

- Due to Microsoft Office Online limitations, 0 Byte files can neither be previewed nor edited.

Edit a file

To edit, right-click on a supported file type for Office Online editing and select **Edit Document**.

> **Note:**
>
> You are prompted to verify your Microsoft Office credentials before accessing the file.

After signing in to your Office 365 account, you can edit the file.

Changes to the file are automatically saved. You can view the Save status of your file at the top left of the Office Online editing session. Verify it displays "Saved to ShareFile"before exiting the editor.

Co-editing a Microsoft Office file

Multiple users can edit a file simultaneously in ShareFile. To co-edit a document or join an active editing session, right-click the file and select **Edit Document**.

After verifying your Microsoft credentials, you may use the web-based editor to modify the file.

Using Share in Microsoft Office application online

To add other users to an editing session or share while the file is open in the corresponding Microsoft Office application online, use the following steps.
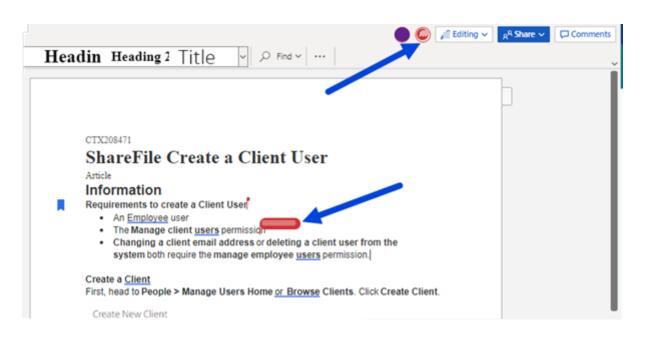
1. Once the file is open in the corresponding Microsoft Office application online, select **Share**.

The **Share** screen displays. Refer to the following sections for more information regarding Share options and configurations:

- Get a shareable link

- Send to specific people

- Link options

Other users in the editing session are denoted by colored cursors within the document. You can also view editing users in the upper right corner of the editor menu.

Get a shareable link

Get a Link allows you to share an editable link with your recipients.

> **Notes:**
>
> - All collaborators both internal and external to the organization can utilize the Microsoft Office Online integration. It requires the author to select permissions and the collaborator to have a Microsoft license.
>
> - This feature is available to **ShareFile Advanced** and **Premium edition** customers who have the setting **Microsoft Office Editing** enabled.
>
>
>
> - Compatible file types are: **.docx** for Word, **.pptx** for PowerPoint, and **.xlsx** for Excel.
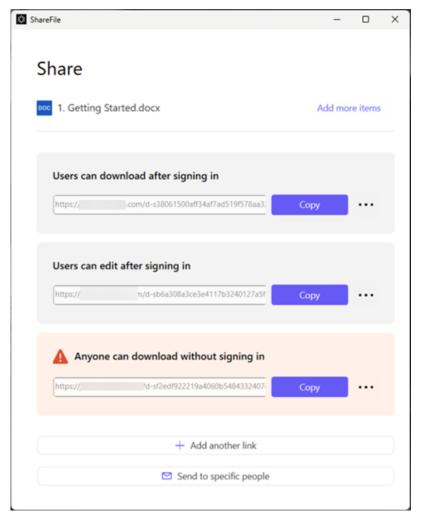
1. Select a file to share in your ShareFile account.

2. Select **Share**.

3. Select **Copy** under the **People can edit after signing in.** option.

The **Link copied to your clipboard** message displays briefly.

4. Use the copied link to share with email or another communication app.

Send to specific people

Use this option when you want to send using ShareFile to send a **Share** message to a specific person.

1. Navigate to the file you want to share in your ShareFile account.

2. Select the file or files you want to share.

3. Select **Share** from the menu.

4. Select **Send to specific people** under the the options offered.

The **Send to specific people** message window displays.

5. Select **Edit options** to review and set the following options:

- **Access options**:

    - **Allow recipients to**: - select **Edit (sign in required)** to allow the editing of Microsoft Office files.

    - **Access expires** - select from various expiration options for recipients.

    - Checkbox for **Require recipients to sign in**.

    - **Downloads per user** - provides a restriction to the number of downloads if necessary.

    - Checkbox for **Always link to the latest version of the file**.

- **Notifications**:

    - Checkbox for **Notify me when this is accessed**.

- Checkbox for **Send me a copy of this email**.

6. Select **Save**.

7. Type in the email address of the recipient in the **To** text box.

8. Though the **Subject** is prefilled, you can type in replacement text.

9. Type in a message if necessary.

10. Click the **Remember subject and message** checkbox if desired.

11. Click **Send**.

The **Share sent successfully** message displays briefly.

Link options

Choose **…** to **Edit** the options for the link, **Replace** the link, or **Delete** the link.

Edit options

In **Edit options**, you set the parameters for recipient access and notifications.

Access options Under **Access options**, select the access parameters for the recipients.

- **Allow people with this link to**:

    - **View** - Recipients can only view the file in the **Preview** window.

    - **Download** - Recipients can download the file.

    - **Edit (sign in Required)** - Recipients can edit the file but must sign in either with their client or employee sign-in.

- **Who can access this link**:

    - **Anyone** (anonymous) - Recipients can only view the file in the **Preview** window.

    - **Anyone** (name and email required) - Recipients can download the file.

    - **Client and employee users**(sign in required) - The recipient is presented with a sign-in screen. The recipient must be an existing user (either an employee or client user) in the account to sign in and view the content. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

    - **Employee users** (sign in required) - The recipient will be presented with a sign in screen. The recipient must be an existing employee user in the account to sign in. If the recipient

is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

- **View access expires** can be adjusted to the available presets.

- **Always link to the latest version of this file** is selected by default. The current version of files will be immediately available within the link.

Notifications   This check box default is set for the sender of the file to receive notifications when the file is accessed. If you prefer not to receive this notification, uncheck the box.

Replace link

Replace link allows you to create a new link with the same permissions. The old link will become inaccessible.

Delete link

Delete link allows you to make the link inaccessible. A new link is created by starting the share process again.

Preview a File

To preview a Microsoft Office file, select the file to open the preview in the **Content Viewer**. The preview will be rendered in the pane on the left. See Preview files for more information.

Copy files

May 1, 2023

Permissions required

- Upload on the destination folder

Instructions
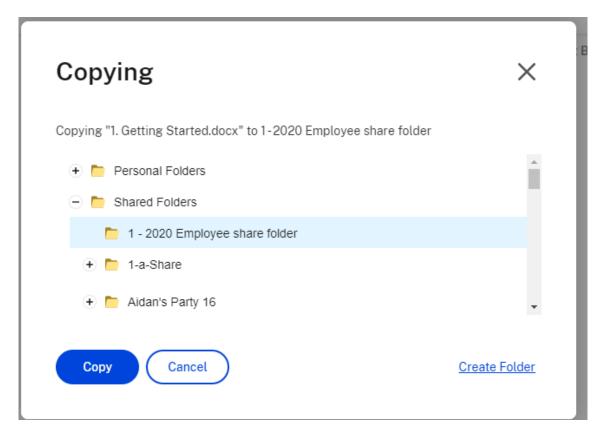
The following steps explain how to copy files in ShareFile.

1. Select the file you want to copy.

2. Select **Copy**.

3. Select the file you want to copy to.

4. Select **Copy**.

The file is copied to the location you selected.

Create a folder

October 2, 2023

If you are an employee user, the **Personal Folders** section is visible within your ShareFile account. By default, you have the ability to upload and download files from this folder. You also will be able to create subfolders inside this folder and add other users to those subfolders with permissions you select.

The **Shared Folders** section of your account contains all folders (created by you or other users) that you have been granted access to. This is considered the root of the entire account.

Folder Retention policy

Personal and shared folders might be subject to a retention policy set by the Admin of your account. To view the retention policy set by your ShareFile administrator, click the **Advanced Folder Options**

link under **More Options** beside the folder name. Under **File Retention Policy** you can view how long your files will stay in the folder before deletion.

Instructions

The following information provides the steps necessary to create and manage folders in ShareFile.

1. Navigate to either **Personal Folders** or **Shared Folders** in your ShareFile account.

2. Hover your cursor over the blue plus sign and select **Create Folder**.

3. Type in the folder **Name** and **Details**.

   > NOTES:
   >
   > - ShareFile does not allow you to have duplicate folder names on the root of the account or in the same parent folder.
   > - If you would like to allow other users to access this folder with specific permissions, click the checkbox for **Add People to Folder**. Leave this box unchecked if you do not wish to add users at this time, or if you plan to add users at a later date.

4. Select **Create Folder**.

To create subfolders, repeat the above steps.

> **Notes:**
>
> - Personal Folders are named with email address of the user at time of first login.
> - If the user's email address is updated, the Personal Folder name will not change.

Delete files

May 1, 2023

Permissions required

- Delete on the current folder

Instructions

The following steps explain how to delete files in ShareFile.

1. Select the file you want to delete.

2. Select **Delete**.

3. Select **Continue** to confirm you want to delete the file.

The file is deleted.

Delete and restore Projects

April 22, 2024

You can delete and restore ShareFile Projects including the content and user resource information.

> **Note:**
>
> Upon deletion, the owner of the project has the ability to restore the deleted project and re-

> sources in the project within 45 days of deletion. For more information, see Restore a deleted
> project

Permissions required

- Only available to ShareFile Premium subscribers
- **Project Owner** is the only role that can delete a project. No
  other role including **Account Admininstrator**, account **Super User** or counterpart can delete a
  project created by you.

> **Warning:**
>
> The only role that can add additional Project Owners is the current Project Owner only. So before
> deleting a user who is the Project Owner, you must assign an additional Project Owner. If a new
> Project Owner is not assigned before removing the current Project Owner, a new Project Owner
> cannot be added and the Project cannot be deleted.

Deleting a project

Use the following steps to delete a project.
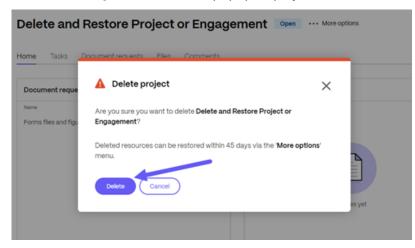
1. In your ShareFile account, navigate to your **Projects** dashboard.

2. Select the Project that you want to delete.

3. Select the ellipses by **More options**.

4. Select **Delete**.

   The **Delete Project** confirmation popup displays.

5. Select **Delete project** to confirm or **Cancel** to keep the project.

The **Deleted project** message displays briefly confirming the project is no longer available.

Restore a deleted project

Project owners can restore a deleted Project. Once a project is deleted, the owner has 45 days to restore the Project.

Use the following steps to restore a previously deleted project.

1. In your ShareFile account, navigate to your **Projects** dashboard.

2. Select the ellipses by **More options**.

3. Select **Recently Deleted** from the list.
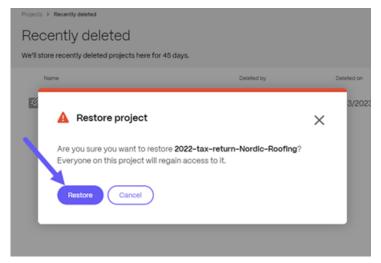
   The **Recently Deleted** screen displays.

4. Select **Restore** next to the project you wish to restore.

   The **Restore project** confirmation pop-up displays.

5. Select **Restore**.

   The Restored Project confirmation message displays briefly.

6. Return to your **Projects** dashboard to confirm the project was restored.

Document requests

April 25, 2024

Document requests is a request list tool to request and collect documents securely and digitally. Document requests are found and initiated in the **Projects** tab in **ShareFile Premium**.

The following information explains the process of using **Document requests** to complete tasks on both the service provider side and the client side.

> **TIP:**
>
> For a list of FAQs for both ShareFile **Projects** and **Document requests**, see FAQ - Projects and Document Request.

Send Document Request - service provider

1. Navigate to **Projects** in your ShareFile account.

---

2. Select an existing project or select **Create Projects**. In these instructions, we selected an existing project.

3. Select **...More options** then **Manage project users**. The **Manage project users** pop-up displays.

4. Select **Invite users** to add a client user to the project.
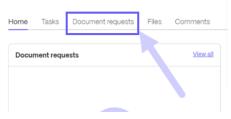
5. Type the name of the client that you want to invite and confirm the **Role** as **Contributor**. As an option, you can add a message.

6. Select **Invite**. The "User successfully added"message displays briefly.

7. In the **Project** dashboard, select the **Document requests** tab.

> **Tips:**
>
> The remaining steps are examples of creating a document request which includes listing the items you are requesting and then sharing the request with the people you want to receive the files from.

8. Select **Create a Document Request**. The **Create a document request** pop-up displays.

9. Type in a title for the request.

10. Type in the **Description** text block, directions for the request. As an example: `"Please provide a copy of your W-2."`

11. Use the calendar to select a **Due date**.

12. Select **Create**. The "Document request created" message displays briefly.

13. Select **Create an item**.

14. Type a name for the item and add a description.

15. Select **Create item**. You can create as many items as you need for the request.

16. Select **Share request**. The **Share request** pop-up displays.

17. Select **Assign to** to add: any user already in the project, a client, an employee, or create a client.

18. You have the option to type a message then select **Share**.

> **Note:**
>
> You can repeat steps 16 and 17 above to add more users to the request. You can also re-move users assigned to a document request by using the **Manage users** option on the ...
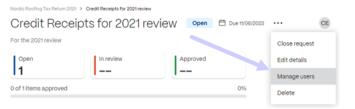
> menu. For more information, see Manage users.

Manage users

The **Manage users** option allows you to remove users from a document request.

1. In the Document request dashboard, select the **Manage users** option on the **...** menu. The **Manage users** pop-up displays.

> **Note:**
>
> You can also access **Manage users** from the avatar icon group.

2. Select the vertical ellipses beside the users name.

3. Select **Remove**. The Remove user confirmation request pop-up displays.

4. Select **Remove**.

   The user is removed from the **Document Request**.

The document request is sent to the client. Use the Projects dashboard to track the status.

Receive Document Request - client

The following information provides you, the client, with the steps necessary to respond to a ShareFile document request from a service provider.

ShareFile

1. Once you receive a document request in your email, select **View document request**. Your ShareFile account opens to the **Projects** dashboard displaying the request.

2. Select the items to review the **Details**. The **Details** tab displays the title of the requested item, the date of the last update, the name of the assignee (you), a description of the request, and a file upload where you can drag one or more requested documents or browse your computer.

> **Note:**
>
> Use the **Comments** tab to provide any information you would like to share regarding their document request.

3. Use *Drag your files here or browse your computer* to upload one or more requested documents. The upload indicator displays the progress of the document upload.

Repeat this step for the remaining items requested if applicable.

4. Select **Submit for review**. One or more requested documents are submitted. The "Submitted item for review" message displays briefly.

The client's **Project** display shows the item to be **In review**.

Document review and approval - service provider

Tracking the client responses and documents on the service provider side is available in the **Projects** folder for the specific client. The following instructions provide the steps necessary to approve and close a document request.

1. Open the project for the client in the **Projects** dashboard.

2. Highlight the requested item in review and then select **Approve**. The "Approved item" message displays briefly.

   Repeat this for all requested items received.

ShareFile

3. Select **Close request**.

4. Select **Close request** to confirm in the pop-up. Type a message to the client if desired.
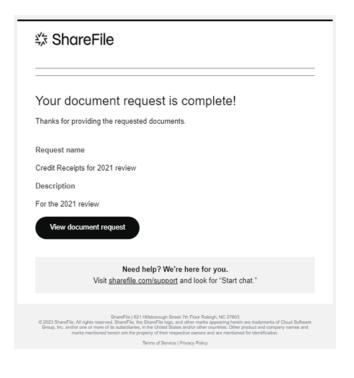
ShareFile

The "Closed request" message displays briefly and an email to the client is sent.

Note:

You can always reopen a closed **Document Request**, if necessary. The client receives a confirmation email if the request is reopened.

The client receives a confirmation email that the document request is complete. The client can select **View document request** to review the request.

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Document request due date change

The owner can edit a due date for each item of the Document Request.

Use the following instructions to make changes to the due date for a requested item.

1. In the **Document request** dashboard, select the document request you must change the due date on.

2. Select the **Edit details** option on the ... menu.

3. Change the date using the **Due date** drop-down calendar.

Document request due date reminders

Due date reminders can be assigned to individual assignees and other users on a project.

The benefits of automatic reminders are:

- Less time manually reminding clients to upload a document or a list of documents.
- Provides clients visibility and transparency on assigning which document request items belong to get documents back faster.
- Project owners can assign several users to multiple items in **Document Requests**.
- Reminders are sent 10 days before its due date. When its due, an overdue notification will be sent daily for 30 days starting the day that is due.

Notifications

The user can select how they want to receive notifications of pending tasks due.
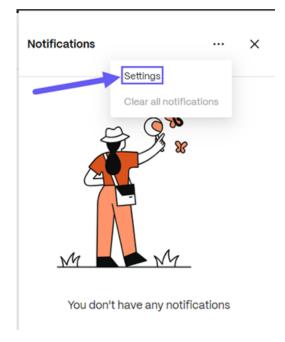
Use the following steps to select how to be notified.

1. Select the Bell symbol from the top right menu in your ShareFile account.
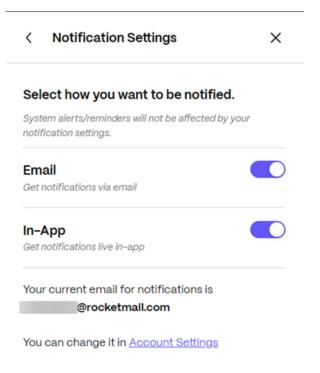
   The **Notifications** window opens.

2. Select the three dots to open the menu.

3. Select **Settings**.
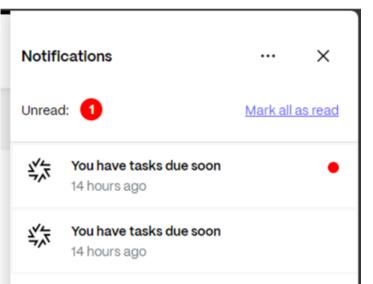
   The **Notification Settings** selector opens.

4. Make your selections using the toggle switch for both Email and In-App.

   If you select Email, you will receive notifications similar to this:

If you select In-App, you can review the notifications in the **Notifications** window.

Note:

If you need to make a change to your email address for **Notifications**, navigate to **Settings** >
Personal Settings > **Edit Profile** > **Email Notifications**.

Edit files

May 1, 2023

The following steps explain how to open and edit a file using ShareFile.

Tip:

Use editable sharing with Microsoft 365. For more information, see ShareFile editable sharing
with Microsoft 365.

1. Navigate to the file you want to edit from your ShareFile folder.

2. Select **Download**. The file donwloads locally to your device.

3. Use the corresponding application to edit the file.

4. After completing the edits, select **Save** from the application menu.

5. Upload the edited file to your ShareFile account.

Email files to ShareFile

April 17, 2024

> **Important:**
>
> We're taking steps to improve the security posture of file requests and sharing. All links default to use secure sharing options which apply across all ShareFile locations: ShareFile desktop app for Mac and Windows, ShareFile Web app, ShareFile Mobile app, ShareFile Plug-in for Microsoft Outlook and Gmail. See New secure sharing options to learn more about ShareFile secure sharing.

Limitations

ShareFile cannot guarantee that this feature will function properly in all customers environments.

Getting a link to email files directly to ShareFile

The following steps explain how to get a link to send files by email to your ShareFile account.

1. Open you ShareFile account.

2. Select **Request Files** from the **Shortcuts** tile on the ShareFile dashboard.

The **Request files** pop-up displays.

3. Select **Edit** to change the **File location** if necessary.

   The **Upload Location** pop-up displays. Select the new location then **Done**.

Note:

The default setting for files requests is **File Box**. For more information, see File Box.

The **Request files** pop-up displays again with the updated file location.

4. Select **Get a link**.

   The **Get a link** popup displays.

5. From the **Get a link** popup, in the URL provided, select and copy the text following the URL(in the example below you would select and copy the text highlighted in blue: r-re8f55a8 254505 2db7fa
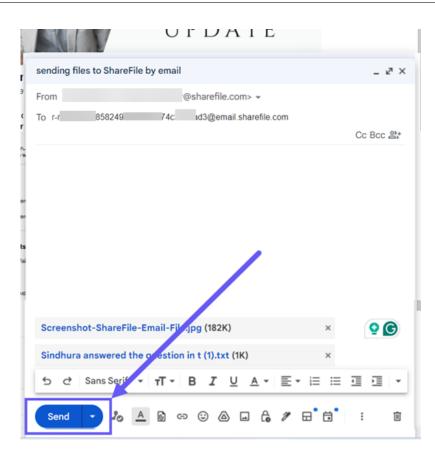
6. With the highlighted part of the link copied, open your email software and compose a new message.

a. In the **To** field, paste the copied text followed by `@mail.sharefile.com`.

b. Select the add attachments icon to navigate and choose the file you want to email to Share-File.

7. Select **Send** to email the files you selected to ShareFile.

8. Open ShareFile and navigate to the folder selected to receive emailed files.

Edit options - Get a link

1. Select **Edit options** from the **Get a link** popup.

The **Edit options** screen displays.

2. Review and set the following options:

- **Access options**:

    – **Who can access this link** - Please configure using **Anyone (public)**.

    – **Access expires** - select from various expiration settings for recipients.

- **Notifications**:

    – Check box for **Notify me when files are uploaded**.

3. Select **Save** to save the changes made to the link options.

File versioning

August 15, 2023

File Versioning allows you to keep and download multiple versions of a single file. Files with the same file name and type are automatically saved as the latest version.

File Versioning ensures that changes are not lost between updates or edits. Any user with download permissions on the folder can view the available file versions for a given file.

Upload a new version of a file

When **File Versioning** is enabled, uploading a file type with the same file name displays as the latest version.

Note:

Each version counts toward the account storage limit.
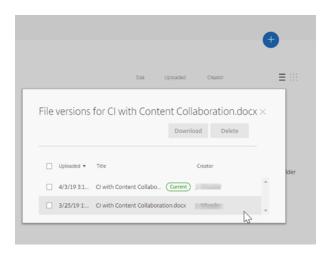
When users download a file that has multiple versions, the latest version will be downloaded. To access previous versions of a file, click the blue versioning icon.

Access Versions

The icon indicates a file with multiple versions. Click the icon to view previous versions of the file. You can download or delete as needed.

Number of Versions

By default, file versioning saves unlimited versions of a file allowing you to see the entire history. You can configure an account-wide default setting and manage version count on a folder-by-folder basis.

Account Default

An Admin user on the account can customize the account-wide default by navigating to **Advanced Preferences** > **File Settings** > **Versioning**.

Individual Folder

To view advanced folder settings, access the **More Options** menu beside the Folder Name.

> **NOTE:**
>
> Enabling or disabling file versioning on the folder level requires the **Admin** permission on the folder.

On the folder options screen, use the **Maximum Versions** drop-down menu to pick the number of versions that can be saved. You can select **Custom** to enter a different value.

You can choose to apply the same setting to all of the subfolders of a folder. When you are finished, select **Save**.

FAQ

What happens if I upload another version of a file when file versioning is disabled?

When versioning is disabled, uploading a new version of a file with the exact same file name overwrites the current file.

> **NOTE:**
>
> Similar file names are treated as a new entity.

What happens if I disable File Versioning on a folder?

Previous versions of your file are not removed. The latest version of your file is displayed within your folder.

Uploading a new version of a file overwrites the latest file version. The older versions are "stacked" beneath the latest version of the file.

Integrations

February 22, 2024

Eliminate manual data entry and duplicate effort by automatically syncing prospective client data, saving time and reducing data entry errors.

Utilize these integrations when using ShareFile:

- Accelerated Agreements
- Creating auto-fill agreement templates.
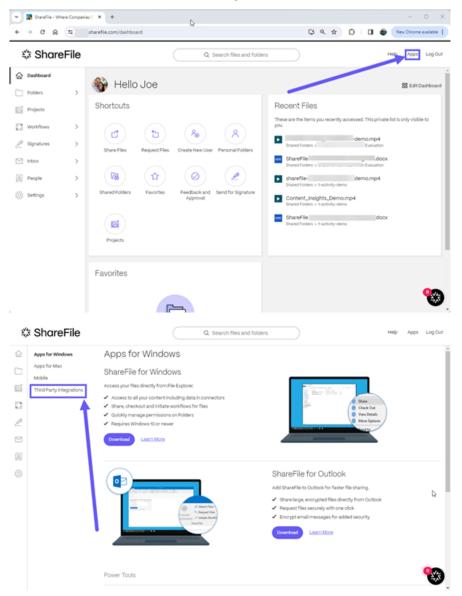
Video: Integrations

The following 2 minute video provides information on how Salesforce and QuickBooks are integrated with ShareFile.

This is an embedded video. Click the link to watch the video
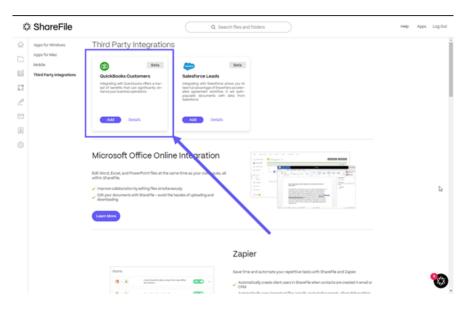
Integrating QuickBooks

Use the following steps to add QuickBooks Customers to your ShareFile account.

1. From your ShareFile dashboard, navigate to **Apps** > **Third Party Integrations**.

2. For Quickbook Customers, select **Add**.
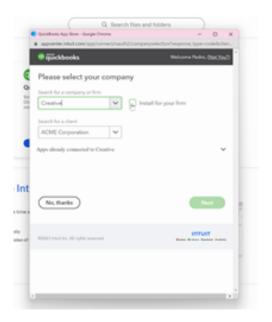
The **Connect ShareFile to your QuickBooks account** popup displays.

3. Select **Next**.

   The **Please select your company** screen displays.

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4. Select or search for a company or firm.

5. Select or search for a client.

6. Select **Next**.

7. Navigate in ShareFile to **People** > **QuickBooks Customers**.

8. Select or use search to locate a prospects.

9. Select **Send Client Agreement**.

10. Choose from the available client agreement templates.

11. Review the auto-fill information provided by the integrated QuickBooks Customers for verification.

12. Select **Send**. This creates a folder for the new client.

    The "**Client agreement successfully sent.**"confirmation message displays briefly.

Integrating Salesforce

Use the following steps to add Salesforce Leads to your ShareFile account and send a client agreement.

1. From your ShareFile dashboard, navigate to **Apps** > **Third Party Integrations**.

2. For Salesforce Leads, select **Add**.

The Salesforce sign on page displays.

3. Type in your Salesforce credentials.

4. Select **Log In**.

5. Navigate in ShareFile to **People** > **Salesforce Leads**.

ShareFile

6. Select or use search to locate a lead.

7. Select **Send Client Agreement**.

ShareFile

8. Choose from the available client agreement templates.

9. Review the auto-fill information provided by the integrated Salesforce Leads for verification.

10. Select **Send**. This creates a folder for the new client.

The "**Client agreement successfully sent.**"confirmation message displays.

Manage your ShareFile storage

April 5, 2024

Five ways to clean data and reduce storage

If your account's storage consumption is high, you can free up space in your account by self-cleaning your storage. We recommend you follow these tips to maintain ShareFile storage hygiene:

- To delete unnecessary, infrequently used files from personal folders:

    - Sort files & folders by size to see the largest or smallest file or folder.

    - Sort files & folders by upload date to identify the oldest file or folder not accessed.

- Delete unsupported and large audio or video files.

- Limit the file versioning. See File versioning for more information.

- Delete messages with large attachments from ShareFile **Inbox**.

- Clean ShareFile **Recycle Bin**.

> **Note:**
>
> Once a file is deleted from ShareFile, it cannot be restored. We recommend you save files locally if needed.

Allocate more storage

Storage and employee accounts can be added to most plans. Contact ShareFile Support, and we'll help you design the perfect ShareFile plan for your business.

Tenant Management

December 15, 2023

> **Did you know…**
>
> - You can add new tenants in ShareFile.
>
> - You can download your tenant list as CSV.
>
> - You can cancel a trial or paid account.
>
> - You can convert a trial account to a paid account.
>
> - You can change the ShareFile plan type for an account.

ShareFile now allows partners to add new tenant accounts. The new automated provisioning provides more streamlined account management, easy tenant setup, and faster time to market.

Tenant Management allows you to add new tenants and manage existing tenants. From the list you can view:

- Account name
- Status
- Licenses used
- Plan name
- Storage zone
- Storage used
- Ellipses to manage tenants

Tenant account ▼	Status	Licenses	Plan	Storage zone	Storage used	
jsdhgjdgkd	Trial	2	Standard	ShareFile US East	None	⋮
hte_____	Trial	1	Standard	ShareFile US East	None	
Yahootenant	Paid	2	Premium	ShareFile US East	None	
_____ Tax Consultants	Trial	1	Premium	ShareFile US East	None	

Prerequisites

- Must have create and manage storage zones enabled.
- Must have **Manage Tenant Access** enabled.
- Must be an Admin with **Manage employees** permission enabled.

Add a tenant

The following steps explain how to add a tenant in ShareFile.

1. In your ShareFile account, navigate to **Settings** > **Admin Settings** > **Advanced Preferences** > **Tenant Management**.

2. Select **Add Tenant**.

3. Type in the **Admin Details** in the corresponding fields.

4. Type in the **Business Details** (tenant) then select that you agree to Terms of Service.

5. Enter account subdomain and check for availability. If taken, select another name.

6. Select the account type.

7. Select plan type. For mor information on ShareFile plan types, see ShareFile.

8. If necessary, select **Provide a support contact for tenants**. This is optional.

> **Note:**
>
> Complete the support contact information fields if you selected the option.

9. Select the storage zone for the tenant account.

Storage Zone

Select the customer's storage zone. *

○ **ShareFile Cloud Hosted**

Everything will be stored and managed in the ShareFile Cloud.

○ **Add to Multi-Tenant** ⑦

Multi-tenant StorageZones created by the partner. <u>Learn more</u>

○ **Standard(Partner-Hosted)**

Setup a dedicated StorageZone later.

10. Select **Finish** to create the tenant account.

Back   Finish   The ShareFile account will be created.

Download as CSV

The following steps explain how to download a CSV with tenant information including the tenant account name, current status, number of licenses, plan type, storage zone name, and storage used.

1. From the Tenant Management dashboard, select **Download as CSV**.

Download as CSV

2. Use your prefered application to open the file.

Cancel an account

1. Select the ellipses at the end of the row for the account that needs to be cancelled.

| jsdhgjdgkd | Trial | 2 | Standard | ShareFile US East | None | ⋮ |

2. Select cancel depending on the type of account:

- For a trial account, select **Cancel trial**.

- For an account, select **Cancel account**.

The status is updated to cancelled and no additional action is required.

Convert a trial account to a paid account

1. Select the ellipses at the end of the row for the account that needs to be converted from trial to paid.

2. Select **Convert to paid**.

3. Select the plan type then **Convert account**.

Change the account plan

1. Select the ellipses at the end of the row of a paid account to change the plan type.

2. Select **Change plan**.

3. Select the plan type then **Change plan**.

Move files

May 1, 2023

Permissions required

- Delete on the current folder
- Upload on the destination folder

Instructions

The following steps explain how to move files in your ShareFile account.

1. Select the file you want to move.

2. Select **Move**.

3. Select the folder you want to move to.

4. Select **Move**.

The file is moved to the location you selected.

Provide user access to folders

May 1, 2023

You can also create a new user from the **Add People to Folder** menu. A client user is created if you add an individual to a folder that is not currently a member of your account.

1. Click the name of the folder where you would like to grant the new user access.
2. Access the **People** tab or the folder access menu.
3. Click the **Add People to Folder** button.
4. Click **Create New User** to add a client user to your account with access to this specific folder.
5. The user's email address, first name, and last name are required. The user is created as a client user and added to the list of users in the pane on the left.
6. Check the **Notify Added Users** option in the bottom right.
7. Save the changes. Your user then receives an email notification that they have been added to the folder and must activate their account.

Personal Settings

September 18, 2023

Employee users can edit their personal settings when they sign into their account. The following information provides the details for each section in **Personal Settings**.

Edit Profile

Edit Profile allows you to edit your profile settings.

Name and Company Details

You can make updates to the *First Name*, *Last Name*, and *Company* fields. Select **Save** once your changes are complete.

Profile Picture   Select **Edit** to add or replace a **Profile Picture**. Select **Remove** to delete.

Change Password

Use **Change Password** to update your password. You are required to enter your previous password before creating a one. You are asked to confirm the new password by entering it in the **Confiirm Password** field.

Select **Save** to change your password.

Passwords must meet the following requirements:

- Must include at least 1 upper case letter
- Must include at least 1 lower case letter
- Must include at least 1 number
- Must include at least 1 special character
- Must have at least 8 characters

> **Note:**
>
> ShareFile does perform a strength check against a weak password database before it is saved.

Edit Email Addresses

Use **Edit Email Addresses** to make changes to your primary email address. You can use the **Add Alternate Email** to add a backup email if necessary.

Email notifications

Email notifications are controlled on a folder by folder basis.

Email Frequency   Use the drop-down list to select your preference to receive upload/download notifications in real-time or consolidated and sent at a time interval you specify.

Default email language   Use the drop-down list to select the email language you prefer for notifications.

Bounce Back Emails   Use **Receive bounce back emails** to edit your preference to receive these notifications.

Time and Date

Use this to change the default settings for all time-related items in your ShareFile account.

Time Zone Select your preferred time zone.

> **Note:**
>
> This setting affects the time zone in emails and account reports that you may generate from the admin settings panel.

Daylight Saving Time Select your preferences for your **Day Light Saving** time location to automatically set the correct time during these periods.

Date format

1. In the **Date format** drop-down list, select the date format preference.

2. Select **Save**.

   Your selected preference is now the default for your ShareFile account and will be used as the deafult in electronic signature requests.

ShareFile

Personal Security

Users can change their security question and edit their information for **Two-Step Verification**. For more information on setting up Two-Step verification, see Security.

My Connectors

Users are able to connect to other cloud services to allow access to those files.

> NOTE:
>
> Account administrators control which connectors are available to users.

Advanced Connections

ShareFile is compatible with FTP clients including WS-FTP or FileZilla. You can also connect to your ShareFile account using a WebDAV client. For more information, see Advanced Connections.

My Apps & Devices
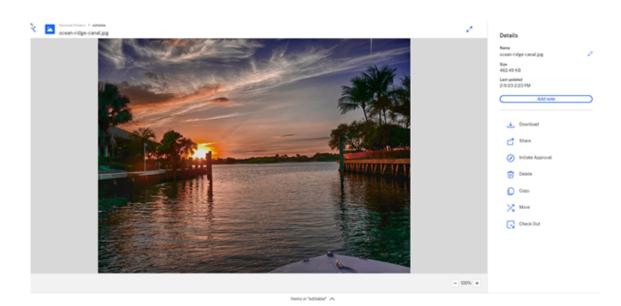
The user can control devices used to access their ShareFile account. For more information, see My Apps & Devices.

Preview files

May 5, 2023

The following steps explain how to open and preview files in ShareFile.

1. Navigate to the folder where the file you want to open exists.

2. Select **Preview**.

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The ShareFile Content Viewer window opens and allows you to view the file before downloading.

Supported file types

- BMP
- GIF (depending on the size of your file, considerably large animated gifs may not display properly)
- JPG
- JPEG
- PNG
- TIF (only first page available for preview)
- TIFF (only first page available for preview)
- PSD
- CRW
- DNG
- NEF (White Balance of original image may not be preserved)

Supported Microsoft 365 file types

Application	Previewing Files	Editing Files
Word	.doc .docm .docx .dot .dotm .dotx .odt	.docm .docx .odt
Excel	Last employee to edit the workflow	.ods .xlsb .xlsm .xlsx

Application	Previewing Files	Editing Files
PowerPoint	.odp .pot .potm .potx .pps .ppsm .ppsx .ppt .pptm .pptx	.odp .ppsx .pptx

Projects

April 25, 2024

Projects is a feature for ShareFile Premium users to improve their client collaboration workflows.

ShareFile Projects is a space centered around document collaboration. Projects is offered both in internal ShareFile accounts and external user portals. Projects enable users to track and engage in client collaboration, such as Document requests, all in one place.

> **TIP:**
>
> For a list of FAQs for both ShareFile **Projects** and **Document requests**, see FAQ - Projects and Document Request.

Creating a Project

1. Navigate to **Projects** in the left side menu.
2. Select **Projects**.

3. Select **Create project**.

   The create project pop-up displays.

4. Type in a name and optional description for the project. This can be edited later if necessary.

5. Select **Create project**. The new project dashboard displays.

Manage Project users

The following information explains the process of managing the users on a particular project.

ShareFile

Owner / Contributor Description

Role	Description
Client	Can only edit and delete their own content in the project unless the client is provided access with the ability to add other contributors within their organization.
Team member	Are counterparts in the project owners organization and can assist with anything in the project. They cannot delete the project owner or other team members from the project.
Owner	Can edit and delete anything in the project and has the ability to delete the projects they created. Project owners can also add team members from their organization to work on the project.
Custom Limited	Limits permission so they can only see the name of the project and its description. It also limits the permissions they can be granted to those available to a client user.
Custom	Assumes no permissions or role (client or employee) and lets a project owner choose only the permissions that a user should have.

Inviting users

Project owners can invite users to a specific project they own and can provide those users default
access roles or custom access.

The following instructions include the steps necessary to invite new users including both contributors
and team members.

1. Select **…More options** then **Manage project users**. The **Manage project users** pop-up displays.

Project users can be an internal user (owner or team member, client, client limited or custom)

> **Note:**
>
> There are additional capabilities accessible now by the 3 dot menu to the right of a Project User.
>
>
>
> For more information, see Managing user permissions

2. Select **Share with others** to add other users to the project.

Edit Permissions

Select **Edit Permissions** to make changes to what a particular user is able to do in the shared project.

This allows you as the **Project owner** the ability to customize each users access in the project.

> **Note:**
>
> Some permissions are automatically modified based on your selections. You can change those permissions as needed.

Project permissions   These permissions apply to the project and everyuthing in it.

Content specific permissions   Use these settings if you need a user's permissions to vary based on the type of content.

> **Note:**
>
> Users always have full permissions for any content they create.

Remove User

Select **Remove User** to remove a particular user from the project. You can add the user back by inviting them to the project again.

Tasks

Tasks allows you to organize and track back-office work related to a client project inside the project itself. For complete information on how to use this feature in Projects, see Tasks.

Document requests
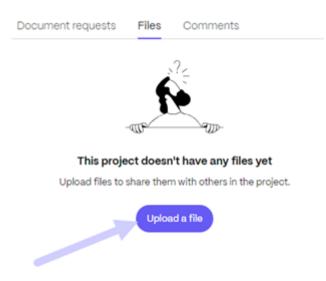
Document requests is a request list tool to request and collect documents securely and digitally. For complete information on the process of using document requests to complete tasks on both the service provider side and the client side, see Document Requests.

Upload files

The following information explains the steps necessary to add files to a project.

Files such as .docx, .pdf, .jpg, .xlsx, and more, can be shared across the project with the invited users.

1. Select the **Files** tab in the Projects dashboard or select **View all** in the Files tile to access or add files.

2. Select **Upload a file**.
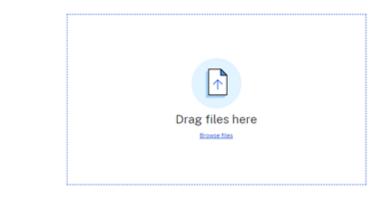
The file upload pop-up displays.

ShareFile

3. You can drag the file to the **Drag files here** section or select **Browse files** to navigate to the file to upload.

4. Select **Upload**. The upload window displays allowing you the option to add more items. Once you have selected the required files, select **Upload** to complete the process.

The file is available for assigned project users to review.

Comments

Comments are used to communicate in the project with other assigned project users.

1. Select **View all** in the **Comments** tile on projects dashboard. This opens the Comment viewer.

2. Type in a comment using the text box. Select **Submit**.

All assigned project users can review the comments and provide their own comments or respond to the previous comments.

Delete a Project

See Delete Projects for information on how to delete a project.

Video: ShareFile Projects

The following 2 minute video provides how to make client collaboration simple in ShareFile.

This is an embedded video. Click the link to watch the video

Rename files

May 1, 2023

Permissions required

- Delete on the current folder

Instructions

The following steps explain how to rename files in ShareFile.

1. Select the file you want to rename.

2. Select **Rename**.

3. Type the new name for the file.

4. Select **Save**.

The file is renamed.

Requesting files

January 31, 2024

> **Important:**
>
> We're taking steps to improve the security posture of file requests and sharing. All links default to use secure sharing options which apply across all ShareFile locations: ShareFile desktop app
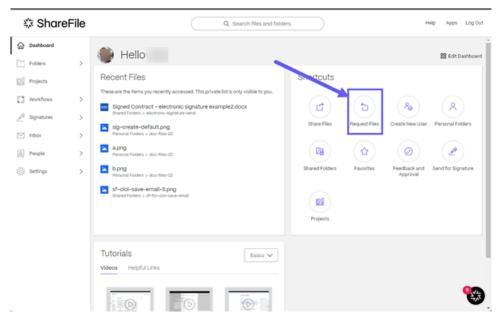
for Mac and Windows, ShareFile Web app, ShareFile Mobile app, ShareFile Plug-in for Microsoft Outlook and Gmail. See New secure sharing options to learn more about ShareFile secure sharing.

The following steps explain how to request a file using ShareFile.

Requesting files using the ShareFile webapp

1. Open you ShareFile account.

2. Select **Request Files** from the **Shortcuts** tile on the ShareFile dashboard.

The **Request files** pop-up displays.

3. Select **Edit** to change the **File location** if necessary.

The **Upload Location** pop-up displays. Select the new location then **Done**.

> **Note:**
>
> The default setting for files requests is **File Box**. For more information, see File Box.

The **Request files** pop-up displays again with the updated file location.

4. Select either Request files - Get a link or Request files - Send to specific people

Request files - Get a link

1. Select **Get a link**.

   The link is copied to the dashboard. You can make changes to the link options by selecting **Edit options**. For more information, see Edit options

2. Paste the copied request link to your email or another communication app.

Edit options - Get a link

1. Select **Edit options** to review and set the following options:

   - **Access options**:

     – **Who can access this link**: - select from various options including **Anyone (public)**, **Anyone (public, must enter a name and email)**, **Client and employees users (after**

signing in) and **Employee users (after signing in)**.

- **Access expires** - select from various expiration settings for recipients.

- **Notifications**:

  - Check box for **Notify me when this is accessed**.

2. Select **Save** to save the changes made to the link options.

3. Paste the copied request link to your email or another communication app.

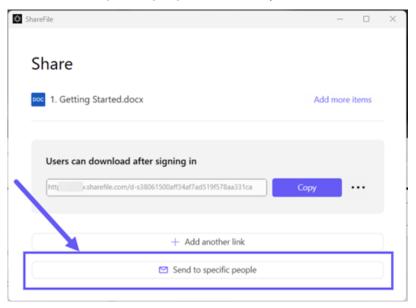## Request files - Send to specific people

Use this option when you want to send using ShareFile to send a **Request** message to a specific person.

1. Select **Send to specific people**.

The **Send to specific people** pop-up displays.

> **Note:**
>
> You can make changes to the access options by selecting **Edit options**. For more information, see Edit options

2. Type in the email address of the recipient in the **To** text box.

3. Though the **Subject** is prefilled, you can type in replacement text.

4. Type in a message if necessary.

5. Select the **Remember subject and message** check box if desired.

6. Select **Request**.

The request is sent.

Edit options - Send to specific people

1. Select **Edit options** to review and set the following options:

   - **Access options**:

     - **Access expires** - select from various expiration settings for recipients.

     - Check box for **Require recipients to sign in**.

   - **Notifications**:

     - Check box for **Notify me when files are uploaded**.

     - Check box for **Send me a copy of this email**.

2. Select **Save**.

3. Select **Request**.

The request is sent.

Share files

November 17, 2023

> **Important:**
>
> We're taking steps to improve the security posture of file sharing. All links default to use secure sharing options which apply across all ShareFile locations: ShareFile desktop app for Mac and Windows, ShareFile Web app, ShareFile Mobile app, ShareFile Plug-in for Microsoft Outlook and

Gmail. See New secure sharing options to learn more about ShareFile secure sharing.

The following steps explain how to share a file using ShareFile.

Getting a Share link

1. Navigate to the file that you want to share in your ShareFile account.

2. Select the file or files that you want to share.

3. Select **Share** from the menu.

4. Select **Copy** under the options offered.

The **Link copied to your clipboard** message displays briefly.

5. Use the copied link to share with your email or another communication app.

Send to specific people

Use this option when you want to send using ShareFile to send a **Share** message to a specific person.

1. Navigate to the file that you want to share in your ShareFile account.

2. Select the file or files that you want to share.

3. Select **Share** from the menu.

4. Select **Send to specific people** under the options offered.

The **Send to specific people** message window displays.

5. If enabled, you can choose to **Encrypt this email** which provides an extra layer of security when sharing confidential files.

> **Tips:**
>
> - **Encrypt this email** allows you to encrypt the body of your message to your recipient, along with any attachments, with industry-standard AES 256 bit encryption. This feature also includes the ability to compose and receive encrypted emails directly from the ShareFile web application.
>
> - **Encrypt this email** is not available in the ShareFile **Standard** plan.

6. Select **Edit options** to review and set the following options:

   - **Access options**:

     - **Allow recipients to**: - select from various options including **View**, **Download**, and **Edit (sign in required)**.

     - **Access expires** - select from various expiration settings for recipients.

     - Check box for **Require recipients to sign in**.

     - **Downloads per user** - provides a restriction to the number of downloads if necessary.

     - Check box for **Always link to the latest version of the file**.

   - **Notifications**:

     - Check box for **Notify me when this is accessed**.

     - Check box for **Send me a copy of this email**.

7. Select **Save**.

8. Type in the email address of the recipient in the **To** text box.

9. Though the **Subject** is prefilled, you can type in replacement text.

10. Type in a message if necessary.

11. Click the **Remember subject and message** check box if wanted.

12. Click **Send**.

The **Share sent successfully** message displays briefly.

Link options

Choose **...** to **Edit** the options for the link, **Replace** the link, or **Delete** the link.

Edit options

In **Edit options**, you set the parameters for recipient access and notifications.

Access options   Under **Access options**, select the access parameters for the recipients.

- **Allow people with this link to**:

    – **Download** - Recipients can download the file.

    – **Edit (sign in Required)** - Recipients can edit the file but must sign in either with their client or employee sign-in. For information about co-editing a Microsoft 365 shared file, see Co-editing in ShareFile.

- **Who can access this link**:

  - **Anyone** (public) - Anyone can download what you're sharing without signing in.

  - **Anyone** (public, must enter name and email) - Recipients can download the file.

  - **Client and employee users**(after signing in) - The recipient is presented with a sign-in screen. The recipient must be an existing user (either an employee or client user) in the account to sign in and view the content. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

  - **Employee users** (after signing in) - The recipient is presented with a sign-in screen. The recipient must be an existing employee user in the account to sign in. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

- **View access expires** can be adjusted to the available presets.

- **Always link to the latest version of this file** is selected by default. The current version of files will be immediately available within the link.

Notifications   This check box default is set for the sender of the file to receive notifications when the file is accessed. If you prefer not to receive this notification, uncheck the box.

Delete link

Delete link allows you to make the link inaccessible. A new link is created by starting the share process again.

Add more items

To add more items to a share link, select **Add more items**.

You are provided the option to add more files from ShareFile or from your device.

Tasks

April 18, 2024

Tasks is a feature for ShareFile Premium users using Projects.

Tasks allows an organization to organize and track back-office work related to a client project inside the project itself. It helps them see the overall project's progress and know who is tasked with doing the work.

Use the instructions below to create tasks in ShareFile **Projects**.

Instructions
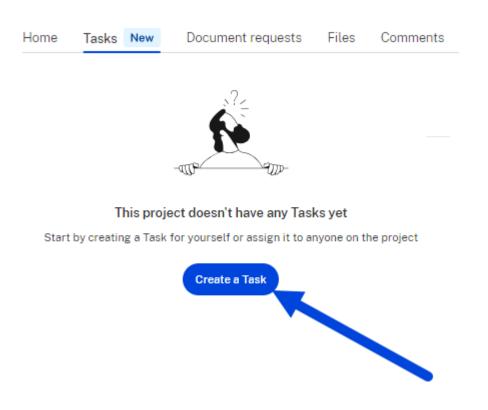
1. In your ShareFile Premium account, navigate to your **Projects** and select the project you want to create a task for.

    The dashboard for the selected project displays.

2. Select the **Tasks** tab.

3. Select **Create a task**.

The **Create new Task** popup displays.

4. Type in the **Title** for the task.

5. Select who to assign the task to in the **Assigned To** field.

6. Type in a description if necessary.

7. Select the current status from the options provided in the **Status** dropdown.

8. Select a **Due Date**. You can backfill a task with a post date if the task is complete.

9. Select **Create a task**. The **Created Task** confirmation displays briefly.

You can track the progress of this task in the selected project's dashboard. You can also review the details of the task by selecting the **View Details** menu item from the verticle ellipses.

Threat detection alerts

February 29, 2024

If ShareFile detects unusual account activity, it will send out an email alert so admins, employee users, or client users of ShareFile can act on threats as soon as they're detected.

Security alerts and recipients

Security alerts are sent to each persona in the given scenarios.

ShareFile

Alert type	Client / Employee	ShareFile Admin	Folder owner
Unusual location alert	Y	Y	Y
Unusual device & location alert	Y	Y	Y
More than 5 failed sign-in attempts	Y	Y	
Malware upload		Y	Y

Client / Employees - refers to the client and employee users who access ShareFile accounts.

ShareFile Admin - refers to the account owner or administrator of the ShareFile account.

Folder owner - refers to the employees or users with access to ShareFile accounts.

The security alert dashboard includes:

- **Alert History** - A log of the past 30 days threats and their details, allowing users to review historical security events.

- **Event Timeline** - A chronological list of activities and events related to the alert, providing context about what happened.

- **Affected Files or Folders** - Information about the specific files or folders that may have been involved in the security event.

- **User and Location Details** - Details about the user accounts, devices, and locations associated with the alert.

Employees and administrators can access the **Activity and Security Alerts** dashboard within the ShareFile web UI by navigating **People** > **Browse Clients** > `select client name` then selecting the **Activity and Security Alerts** tab that provides detailed information about the alert.

Activity and Security Alerts dashboard

The ShareFile **Activity and Security Alerts** dashboard provides a view of recent security alerts and user activity details when a security warning occurs.

The security dashboard provides a range of response actions, allowing you to proactively mitigate potential risks. Users can review folder activity, users simply need to tap on the **Review folder activity** button. This opens a list of all folders allowing you to select the period of time using the drop-down list. The list includes the date, time, location, and the type of action.

Email alerts

These notifications are designed to keep you informed in real-time about any unusual activities or potential threats related to your data.

1. Upon receiving an alert notification email, select the **Review user activity** button to review the activity.

   Selecting **Review user activity** redirects you to your dedicated security dashboard. The security dashboard serves as a central hub for comprehensive threat analysis and response.

2. Review the items listed under the **Activity and Security Alerts** tab.

Within the security dashboard, you'll have access to detailed threat information, including the nature of the alert, a chronological timeline of events, files and folder details, and specific user and location details.

Users can take actions like disabling other user's access, resetting the user password, and removing from folder access.

Threat remediation

ShareFile offers several actions to mitigate threats. Once alerts are received, employees, clients, and administrators can use the information provided by the alerts to take action.

Roles and Actions:

Employee and client users: - upon receiving an alert can take immediate action including:
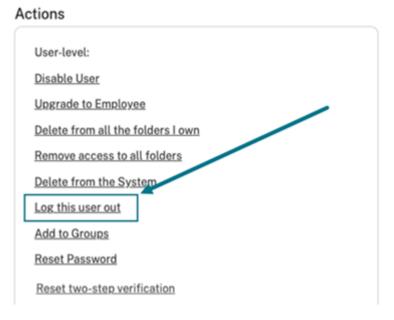
- **Change Password** If they receive an alert about unusual access or failed sign-in attempts, they can change their password to secure their account.
- **Review Files** If alerted about a malware upload, clients can review their files and delete them if necessary.

Administrators: - upon receiving a notification can take several steps to stop a threat including:

- **Blocking account access** Admins are able to disable access to an account and delete the user from the system.
- **Limit folder access** Admins can change permissions for folder access and review folder activity.
- **Log the user out** Admins can log a user out and reset the password or two-step verification.
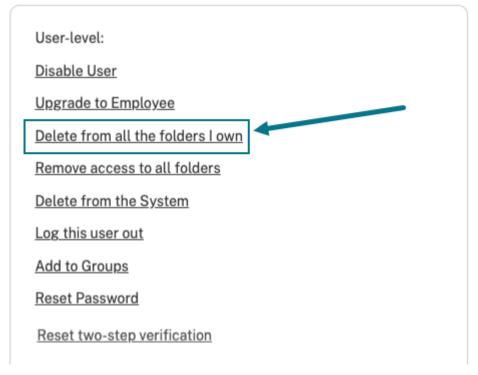- **Review files** Admins can review, delete, and quarantine the affected files.

ShareFile

Actions to take when an alert is received

1. **Change your password:** if you receive an alert of unusual access on your account, select **Change Password** to secure your account.

2. **Manage Folder Permissions:** if you receive an alert of unusual access on a user or client account, change the folder permissions. For more information on changing folder permissions, see Assigning folders and setting permissions.

3. **User specific actions:** from your ShareFile account, navigate to **People** > then select between **Browse Employees** or **Browse Clients** to perform the following actions if necessary:

   - **Log this user out:** if you receive an alert of unusual access on a user or client account, you can log the user out.
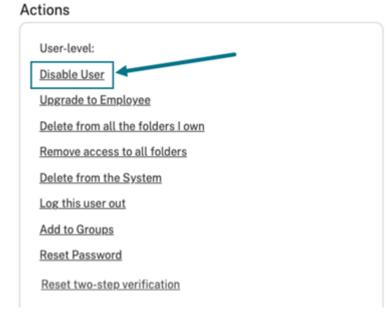
   - **Delete from all the folders I own:** if you receive an alert of unusual access on a user or client account, you can delete the user from all the folders you own.

- **Disable User:** if you receive an alert of unusual access on a user or client account, you can disable the users account.

Manage notifications

> **NOTE:**
>
> Only ShareFile account administrators can make changes to **Security alert** settings.

ShareFile administrators are able to select what type of notification emails are sent to different account types. Administrators can tailor the notification settings to align the unique needs and responsibilities of each account.

Enabling notifications by Admin

If an administrator enables notifications for employees, recipients will receive alert emails regardless of their individual settings. In this scenario, even if employees have disabled notifications, they will still receive alerts per the admin's configuration.

Disabling Notifications by Admin

If an administrator chooses to disable notifications for clients, recipients will not receive alert emails. However, if individuals have enabled notifications for themselves, they will still receive alerts. Admin overrides do not affect individual user preferences in this case.

Mutual Disabling by Admin and Employees

When an administrator disables notifications for employees and individuals on their end and also disables notifications, no alert emails will be sent. This mutual agreement makes it a seamless experience without unnecessary alerts.

Flexible Email Notification System for Security Alerts

Employee users can tailor their email notifications to their preferences. This ensures they are informed about critical security incidents without being overwhelmed by less urgent alerts.

The following information defines the user email notification preferences for security alerts customization.

- **Individual control** - Each employee user can customize their email notification preferences for security alerts. They can access their settings or preferences within the system to specify which types of security alerts they want to receive via email.

- **Enable and Disable alerts** - Within their settings, employee users can enable or disable specific types of email notifications. For instance, they might choose to receive email alerts for critical security incidents but disable notifications for less severe issues.

Threat alerts forwarding to internal security teams

This allows Admins to efficiently route security-related email alerts to their organization's internal security team. This ensures prompt action and effective communication in the face of potential threats.

Alert forwarding overview

- **Email routing setup** - Admins can access the **Alert Preferences** section within ShareFile to enable the **Email Alert Routing** feature. Once activated, they can specify one or more email addresses for their internal security team or distribution list to receive security-related email alerts.

- **Customization Options** - Users have the flexibility to add, edit, or remove email addresses associated with the internal security team as needed. Additionally, they can customize the feature by specifying multiple email addresses for different security teams or individuals within the organization.

- **Email Format and Call to Action** - Recipients will receive alerts in the same format as Admin emails within the system, providing detailed information about specific security events. This fosters a cohesive and informed response to potential threats.

ShareFile threat detection alerts FAQ

What are the threat detection alerts?

A threat detection alert is a notification that you receive when a potential security threat has been detected on your account or system. ShareFile sends alerts to keep your data and account safe.

Why am I getting these alerts?

Threat detection alerts are sent to help you protect your account and system from harm. By being aware of potential threats, you can take steps to mitigate them before they cause any damage.

The first thing to do is verify its legitimacy. Ensure that the emails are either from `sharefile@sf-notifications.com` or `mail@sf-notifications.com`.

You have to confirm that the alert is legitimate.

- **Client** - Once the client receives an email, they can change the password.

- **Employee** / **owner** - Once they receive an email, they can select the **Review user activity** tab within the email. You're redirected to the dashboard, where you can take the appropriate action, depending on the nature of the threat from the dashboard.

What is the security dashboard? What actions can I take?

It's where employees/admins can see all the alert details. It provides real-time insights into security events, threats, and vulnerabilities. Actions like disabling another user's access, deleting the user, or resetting the user's password are available.

What type of activities will I receive emails?

Clients, employee users, and administrators receive emails for the following types of suspicious activities:

- Unusual login from a different location
- Unusual login from different device and location
- Malware upload
- Multiple authentication failure

Upload files

May 1, 2023

ShareFile allows you to upload **ALL** file types. There is a size limit based on your ShareFile plan level. For more information on these size limits, see Account storage limits.

The following steps explain how to upload files using ShareFile once you have created a folder.
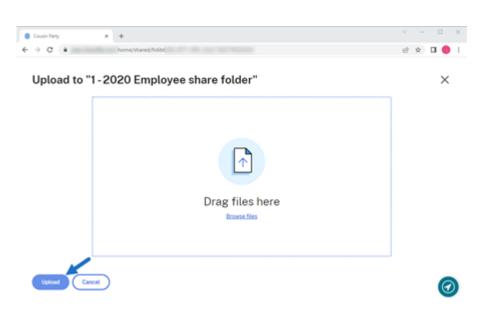
1. In the ShareFile webapp, select and open a folder.

2. Hover your cursor over the blue plus sign and select **Upload**.

3. Either drag the file to the **Drag files here** window or select **Browse files** to navigate to the file to upload.

4. Select **Upload**.

Account storage limits

Depending on your plan level, your ShareFile account supports the upload and download of files up to 10GB or 100GB in size.

> **TIP:**
>
> The maximum file size for uploads and downloads on the ShareFile system is 100GB.

Account Upload Limits

- ShareFile Standard Plan: 10GB upload limit

- ShareFile Advanced Plan: 100GB upload limit

- ShareFile Premium Plan: 100GB upload limit

If you want to upgrade your plan that allows the maximum file size of 100GB for large uploads and downloads, contact the ShareFile Sales team for assistance. Administrators on the account with **Request Plan Change** permissions can upgrade the plan while logged into ShareFile.

If your upload process cannot be completed within 18 hours, ShareFile recommends breaking your upload into smaller segments.

Citrix Files for Android

September 1, 2023

Citrix Files for Android helps you exchange files easily, securely and professionally.

Citrix Files for Android is a file manager that offers secure data sharing and storage. Citrix Files offers customizable usage and settings allowing you to collaborate more easily and get your work done from any Android device —anytime, anywhere.

Download Citrix Files for Android at Google Play Store

For information about new features, see What's new.

System requirements

OS requirements

Android 7.0 (Nougat) or later

Fixed issues

Fixed issues in 2360

- This release addresses issues that improve overall stability.

Fixed issues in 2320

- Client certificate authentication is updated. [SFAND-5895]

Fixed issues in 2250

- This release addresses issues that improve overall stability.

Fixed issues in 2230

- Attempts to authenticate using **Secure Mail** might cause the Citrix Files application to fail. [SFAND-5819]

Fixed issues in 2220

- This release addresses issues that improve overall stability.

Fixed issues in 21120

- Attempts to sign on to the Citrix Files application might cause an error. [CCCHELP-2439]

Fixed issues in 21110

- This release addresses issues that help to improve overall performance.

Fixed issues in 2175

- This release addresses issues that help to improve overall performance.

Fixed issues in 2130

- Using Quick Edit for Excel files might produce an errant date format. [CCCHELP-1415]
- Attempts to launch Quick Edit in Citrix Files for Android using SSO might fail. [CCCHELP-1501]

Fixed issues in 20110

- When you launch the Citrix Files app from Citrix Workspace, you might be required to manually sign in to Citrix Files. [SFAND-5454]

Fixed issues in 2080

- This release addresses issues that improve overall stability.

Fixed issues in 2070

- When you launch Citrix Workspace app from Citrix Files, you might be required enter a pin. [SFAND-5407]

Fixed issues in 2060

- When accessing a shared link in Secure Mail, Citrix Files for Android might not open. [SFAND-5325]
- Shared anonymous links requiring an email or username might cause an error. [SFAND-5377]

Fixed issues in 2050

This release also addresses issues that help to improve overall performance and stability.

Fixed issues in 2040

- After logging out of Citrix Files for Android, you might receive an error message. [CCCHELP-383]

- When **Notify user that he/she has been added to this folder** is unchecked, the user might receive a notification. [SFAND-5249]

- When offline and requesting files using Citrix Files email, an unknown error might occur. [SFAND-5268]

Fixed issues in 2035

- Launching Quick Edit in Citrix Files for Android might stop the app from working. [CCCHELP-302]

Fixed issues in 2030

- Using Citrix Files for Android to rename files within a network share might cause an unknown error. [XMHELP-2555]

Known issues

Known issues in 2380

When attempting to open a file from **Citrix Files for Android** in your device's Microsoft Office 365 application for the first time, Microsoft Office 365 might fail to launch. We are working with Microsoft to resolve this issue.

Known issues in 2175

No new issues have been observed in this release.

Known issues in 2130

No new issues have been observed in this release.

Known issues in 20110

No new issues have been observed in this release.

Known issues in 2080

No new issues have been observed in this release.

Known issues in 2070

No new issues have been observed in this release.

Known issues in 2060

No new issues have been observed in this release.

Known issues in 2040

No new issues have been observed in this release.

Known issues in 2035

No new issues have been observed in this release.

Known issues in 2030

No new issues have been observed in this release.

Known issues in 2020

No new issues have been observed in this release.

Known issues in 2010

No new issues have been observed in this release.

Co-editing using your Android device

March 22, 2024

ShareFile offers users Microsoft Office 365 editing abilities in Citrix Files for Android. This feature allows you to do the following:

- Live co-editing abilities with multiple users
- View all types of online files
- Edit Microsoft 365 files online
- View offline files
- Create new Microsoft Office files to share with users

Tips:

Though offline editing is not available, you can view offline files.

Prerequisites

- Users must have a ShareFile Advanced or Premium plan
- Users must have a supported Microsoft Office 365 plan and have the application installed on their device.

Supported Microsoft Office 365 Plans

- Microsoft 365 Business Basics
- Microsoft 365 Business Standard
- Microsoft 365 Business Premium
- Microsoft 365 Apps for business

See Microsoft announces mobile editing availability for more subscribers for more information.

Disclaimer:

By enabling this feature, you are confirming that you have reviewed and agreed to the Microsoft Terms of Use and Privacy Policy linked. The **Preview** option is required for editing.

File type requirements

Microsoft requirements file type requirements for editing.

Application	Previewing Files	Editing Files
Word	.doc .docm .docx	.docm .docx
Excel	.xls .xlsm .xlsb .xlsx	.xlsb .xlsm .xlsx
PowerPoint	.pps .pptx .ppsx .ppt	.ppsx .pptx

Open files to edit

The following information provides the steps necessary to open a Microsoft Office file in Citrix Files for Android and make edits.

> **Note:**
>
> The Microsoft Office 365 application must be installed on your device and signed into before you can make edits to a particular file. For instance, you need the mobile version of Microsoft Word installed on your Android device before you can make edits to a document file stored in ShareFile.

1. Open your Citrix Files app on your device.

2. Sign into your ShareFile account.
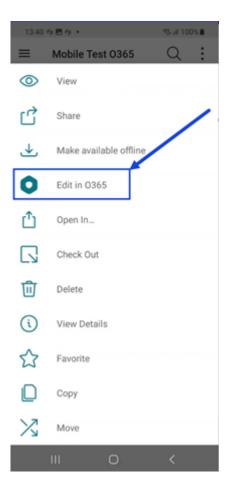
3. Navigate to the folder that contains the file you want to edit.

4. Select the file.
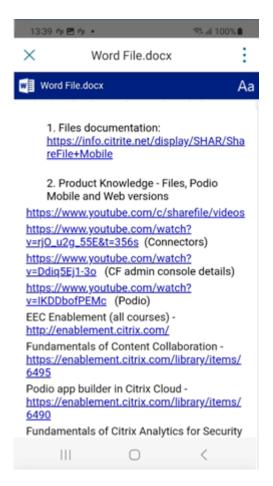
   The file opens and is viewable in Citrix Files.

5. Select the vertical ellipses then **Edit in O365**.
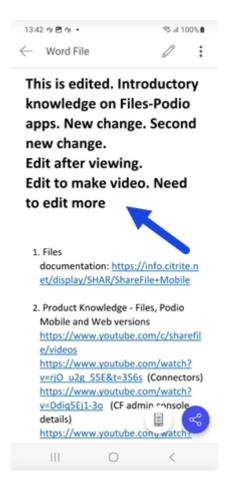
The file automatically opens the Microsoft Office app the file type is associated with. In this case it is Microsoft Word.

6. Make the necessary edits in the Microsoft Word mobile application.

7. Return to your Citrix Files application to review the recent edits.

Create folders

March 22, 2024
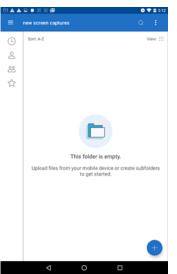
The following steps explain how to create folders in ShareFile using your Android device.

1. Open Personal or Shared Folders where you want to create a folder.

2. Tap the + blue circle to open the menu. The menu appears.

3. Tap **Create Folder** from the menu. The **Create Folder** screen appears.

4. Type a name for the new folder and any notes in the corresponding sections.

5. Tap **Create Folder**. The new folder window appears.

Delete files

March 22, 2024

The following steps explain how to delete files in ShareFile using your Android device.

1. Navigate on your device to the folder holding the file you want to delete.

2. Tap the vertical ellipses.

3. Tap Delete from the menu. A confirmation screen appears.

4. Tap OK on the confirmation screen to delete the file. A "File deleted"message appears at the bottom of the screen.
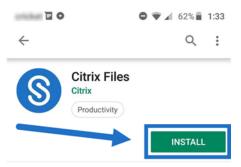
Download Citrix Files app

March 22, 2024

The following steps explain how to download Citrix Files for your device and log into your Citrix Files account.

1. Open the Play Store application on your device.

2. Search for Citrix Files.

3. Tap Install.

4. Tap the Citrix Files icon to open.

5. Type your Citrix login information.

Citrix Files opens displaying your folders.

Download and view files

March 22, 2024

The following steps explain how to download files in ShareFile using your Android device.

1. Using your device, navigate to the folder holding the file(s) you want to download.

2. Tap the file. The file displays.

3. Tap the vertical ellipses for the menu.

4. Tap Open In.

The app you select depends on the type of file you download. Select the corresponding application to the file you selected.
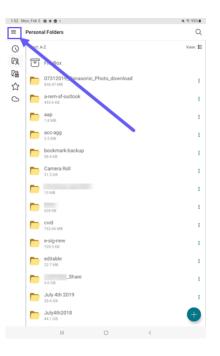
Send Logs

March 22, 2024

When you are consulting with **ShareFile Technical Support**, they might ask you to provide them a log file to assist them in diagnosing your problem.

The following provides the steps necessary to provide a log file for ShareFile Technical Support.

1. In the Citrix Files app, navigate to the hamburger menu and tap it.

2. Tap **Help and About**.

3. Tap **Send Log to Citrix Files**.

4. Enter a description of your issue to assist the technical support representative, then tap **Send**.

The confirmation message displays.

> **Note:**
>
> If you need further assistance, reference the number noted in the confirmation message when talking to the technical support representative.

Sharing files
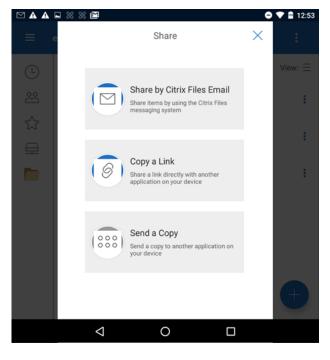
March 22, 2024

The following steps explain how to share files in ShareFile using your Android device.

1. Navigate on your device to the folder holding the files you want to share.

2. Tap the vertical ellipsis.

3. Tap Share from the menu.

4. The following screen allows you to select from the following options: Share by Citrix Files Email, Copy a Link, or Send a Copy. For these steps, we are going to use Share by Citrix Files Email.
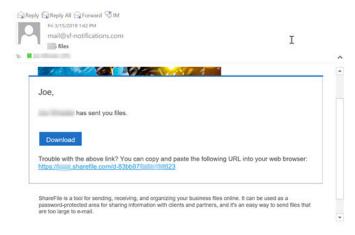
A "File deleted" message appears at the bottom of the screen.

5. Tap Share by Citrix Files Email.

6. Enter a Recipient for your message. You can enter an email address manually, or select users from your address book.

7. Enter a Subject for your message. You can enter additional text in the body of your message if needed.

8. Edit Message Options allows you to customize the following:

    - Send me a copy of this email - Receive a copy of the email message
    - Require recipients to log in - Require that recipients log in with their Citrix account. If your recipient is not already a user on your account, they are required to create a user name and password before accessing the file.
    - Notify me when files are accessed - Receive a notification email when the file is Viewed or Downloaded
    - Allow recipients to - choose from view and download with watermark or have full control.
    - Access expires - Set how long you want the download link to be accessible. If sending a file stored on your computer, this defaults to the default length of time files can remain in the File Box
    - Accesses per user - Limit the number of views or downloads
    - Always link to the latest version of the file - This feature is only available to users with File Versioning enabled.

9. Click Send File Link when ready. A "File shared"message appears at the bottom of the screen.

Follow the instructions for your Mail app to send the message that includes the link. The recipient receives a message:

Upload files

March 22, 2024

The following steps explain how to upload files in ShareFile using your Android device.

1. Tap the + blue circle to open the menu. The menu displays.

2. Tap Upload Files.

3. Choose from the available options to upload.

    Note:

    You might be asked to allow Citrix Files to access your device functions.

4. Tap the items you want to upload noting that for multiple items, use the long tap.

5. Tap Open.

The file uploads to your device.

ShareFile for Google Workspace

August 10, 2023

ShareFile for Google Workspace is a feature app for ShareFile Advanced and Premium customers when using their Gmail accounts.

The ShareFile add-on is seamlessly integrated into your productivity tools and transforms collaboration, simplifies file sharing, and supercharges productivity.

Be notified whenever someone accesses a file or sends you a file so you are always aware of what is going and can take action. You can also set different security and access levels.

For end-user help including accessing and sign in, see User Guidance for ShareFile in Google Workspace

Access the ShareFile add-on by visiting the ShareFile add-on page.

For information about new features, see What's new.

System requirements

Browser requirements

- Ensure users are on the latest version of Google Chrome.

Fixed issues

There are no fixed issues at this time.

Known issues

There are no known issues at this time.

About ShareFile in Google Workspace

August 1, 2023

The ShareFile add-on is seamlessly integrated into your productivity tools and transforms collaboration, simplifies file sharing, and supercharges productivity. To add ShareFile, visit Google Workspace Marketplace.

Simplify file sharing

Say goodbye to manual downloads and uploads —with just a few clicks you can securely share from ShareFile and receive files in ShareFile all from your Gmail. Whether it's large documents, multimedia files, or important presentations, effortlessly include them in your work without worrying about attachment size limits.

Secure collaboration

Effortlessly collaborate with ShareFile add-on - You can grant specific permissions to recipients, ensuring secure and controlled access to shared files and folders. You can track document accesses and keep everyone on the same page by linking to the latest version of files.

Work productively from anywhere

Access the ShareFile add-on from any browser or device and access the most up-to-date information because ShareFile automatically syncs your files across devices.

About ShareFile

Join over a million users who have embraced ShareFile as their go-to solution for secure file sharing and content collaboration. Simplify your workflow, enhance collaboration and elevate your productivity with ShareFile.

Adding and accessing ShareFile in Google Workspace

August 1, 2023

Adding ShareFile to your Google Workspace account

The following steps explain how to add ShareFile in Google Workspace.

1. Sign in to your Google Workspace account.

2. Go to Google Workspace Marketplace or search for **ShareFile**.
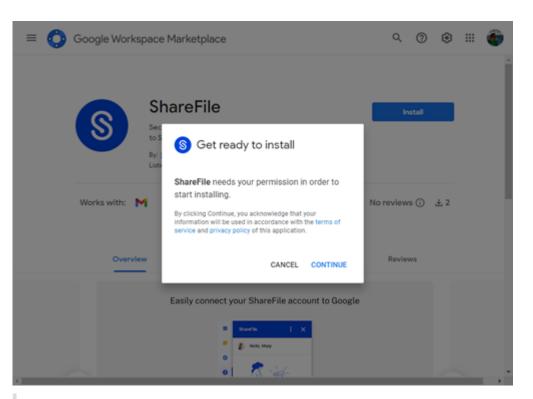
   The ShareFile selection displays.

3. Select the **ShareFile** app.

4. Select **Install**.

5. Select **Continue**.

ShareFile

Note:

You might be asked to select a Google Account. If so, select the Google account you want to add ShareFile to.

The request screen to allow ShareFile to access your Google account displays. Select **Allow**.

6. Once the ShareFile has been installed screen displays, select **Done**.

Accessing ShareFile in Google Workspace

The following steps explain how to add ShareFile in Google Workspace.

1. Navigate to your Gmail account.

2. Select **Compose** to open up a new message window.

3. Select the ShareFile icon at the bottom of the new message window.

The Welcome to **ShareFile Sign up/Sign in** screen displays. If you are new to ShareFile, select **Sign up** and see Getting started with ShareFile for more information.

Select **Sign in** if you have an existing ShareFile account.

4. Type your account URL (enter "mycompany" for mycompany.sharefile.com) then Continue.

5. Type your email and password, then select Sign In.

Once you are signed in, the **"You'****ve signed in to ShareFile for Google Workspace! Please close this window to proceed."** screen displays.

You've signed in to ShareFile for Google Workspace! Please close this
window to proceed.

Insert files
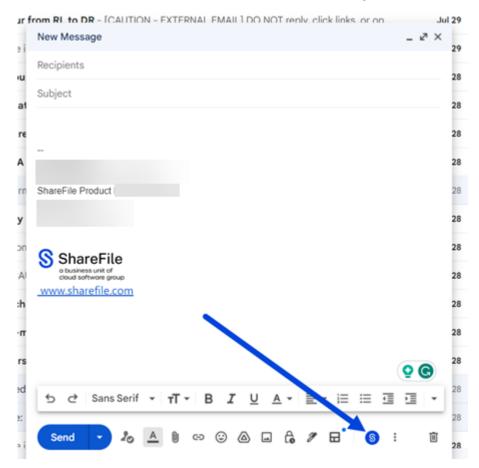
August 8, 2023

Use the instructions on this page to insert files in your Gmail messages using ShareFile. For information on how to insert files directly from ShareFile, see Insert files from your ShareFile account. For information on how to upload files from your local PC, see Insert files from your local PC.

Insert files from your ShareFile account

Use the following instructions to share files using ShareFile in Google Workspace.

1. Navigate to your Gmail account.

2. Select **Compose** to open up a new message window.

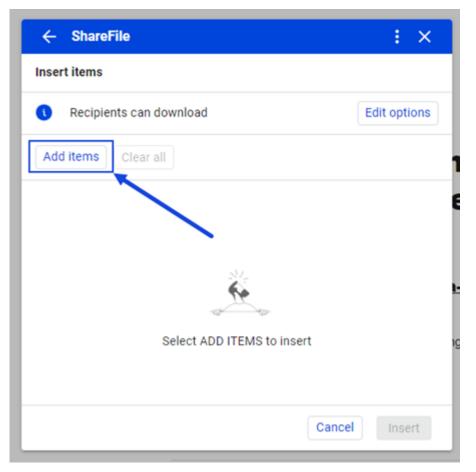3. Select the ShareFile icon at the bottom of the new message window.

4. Select **Share or request files using ShareFile**.

5. Select **Insert files**.

6. Navigate to select the file you want to share, then select **Add items** to choose files to share from your ShareFile folders.

7. Select **Edit options** to set the share details.

The options screen displays.

You can review and set the following options:

- **Access options**:

  - **Allow recipients to** - select from the available options including **Download** and **Edit (sign in required)**.

  - **Access expires** - select from various expiration settings for recipients.

  - **Who can access this link** - select from the following:

    * **Anyone** (anonymous) - Recipients can only view the file in the **Preview** window.

    * **Anyone** (name and email required) - Recipients can download the file.

    * **Employee users** (sign in required) - The recipient will be presented with a sign in screen. The recipient must be an existing employee user in the account to sign in. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

    * **Client and employee users**(sign in required) - The recipient is presented with a sign-in screen. The recipient must be an existing user (either an employee or client user) in the account to sign in and view the content. If the recipient is not a

user in the account, then it is necessary to create the user account for the recipient before they can access the file.

- **Always link to the latest version of this file** - is selected by default. The current version of files will be immediately available within the link.

- **Add a watermark** - allows you to track documents by user. This includes printing. If the user has download permissions, the watermark does not appear while viewing.

- **Notifications**:

  - Check box for **Notify me when files are accessed**.

8. Once the options are set, select **Insert** at the bottom of the window.

The Gmail message then displays an **Upload File** link in the message.

9. Verify your recipients, the Subject, and optional message to send the file, then select **Send**.

Insert files from your local PC

Use these steps to upload files from your local PC.

1. Navigate to your Gmail account.

2. Select **Compose** to open up a new message window.

3. Select the ShareFile icon at the bottom of the new message window.

4. Select **Share or request files using ShareFile**.

5. Select **Insert files**.

6. Select **Add items** to open your ShareFile folders.

7. Select the folder you want to upload to, then select **Upload**.

Your ShareFile web application opens in a new tab to the folder your designated in the previous step.

8. Use the blue **+** to select upload from your PC.

   The file will load into the folder you selected. You can now return to the Gmail tab.

9. Select **Refresh** then select the checkbox next to the file loaded in the previous step and select **Add Items**.

10. Select **Edit options** to set the share details.

The options screen displays.

You can review and set the following options:

- **Access options**:

  - **Allow recipients to** - select from the available options including **Download** and **Edit (sign in required)**.

  - **Access expires** - select from various expiration settings for recipients.

  - **Who can access this link** - select from the following:

    * **Anyone** (anonymous) - Recipients can only view the file in the **Preview** window.

    * **Anyone** (name and email required) - Recipients can download the file.

    * **Employee users** (sign in required) - The recipient will be presented with a sign in screen. The recipient must be an existing employee user in the account to sign in. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

    * **Client and employee users**(sign in required) - The recipient is presented with a sign-in screen. The recipient must be an existing user (either an employee or client user) in the account to sign in and view the content. If the recipient is not a

user in the account, then it is necessary to create the user account for the recipient before they can access the file.

  – **Always link to the latest version of this file** - is selected by default. The current version of files will be immediately available within the link.

  – **Add a watermark** - allows you to track documents by user. This includes printing. If the user has download permissions, the watermark does not appear while viewing.

- **Notifications**:

  – Check box for **Notify me when files are accessed**.

11. Once the options are set, select **Insert** at the bottom of the window.

The Gmail message then displays an **Upload File** link in the message.

12. Verify your recipients, the Subject, and optional message to send the file, then select **Send**.

Request a file

August 7, 2023

Use the following instructions to request a file using ShareFile in Google Workspace.

1. Navigate to your Gmail account.

2. Select **Compose** to open up a new message window.

3. Select the ShareFile icon at the bottom of the new message window.

4. Select **Share or request files using ShareFile**.

5. Select **Request files**.

6. Select **Edit options** to set the request details.

The options screen displays.

You can review and set the following options:

- **Access options**:

    - **Access expires** - select from various expiration settings for recipients.

    - **Who can access this link** - select from the following:

        * **Anyone** (anonymous) - recipients can upload the file anonymously.

        * **Anyone** (name and email required) - Recipients can download the file.

        * **Employee users** (sign in required) - the recipient will be presented with a sign in screen. The recipient must be an existing employee user in the account to sign in. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

        * **Client and employee users**(sign in required) - the recipient is presented with a sign-in screen. The recipient must be an existing user (either an employee or client user) in the account to sign in and view the content. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

- **Notifications**:

    - Check box for **Notify me when files are accessed**.

- **Upload location** - the default is set to your **File Box** but you can set another ShareFile folder for the requested file.

7. Once the options are set, select **Insert request link** at the bottom of the window.

    The Gmail message then displays an **Upload File** link in the message.

8. Verify your receipients, the Subject, and optional message to requesting a file, then select **Send**.

Save Google Workspace emails with ShareFile

December 11, 2023

Use the following steps to seamlessly save entire email threads and attachments directly to ShareFile using your Gmail account in Google Workspace.

1. Open the email thread that you want to save.
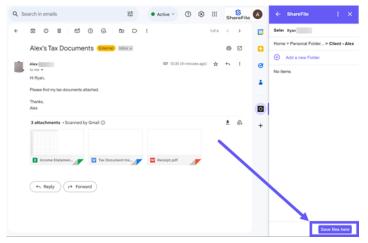
2. Select the ShareFile icon in the Google Workspace apps.

3. Select the email and any attachment of file(s) you want to save.

4. Select **Proceed to Save Files**.

5. Select the destination folder or create a folder in ShareFile.

6. Select **Save Files here**.

7. Select **Close** once the **Upload completed** screen displays.

User Guidance for ShareFile in Google Workspace

August 2, 2023

User how-to articles

The following lists commonly used actions in ShareFile in Google Workspace. Select from the list to learn more about a particular function or feature.

- About ShareFile in Google Workspace

- Adding and accessing ShareFile in Google Workspace

- Request a file

- Insert files

Citrix Files for iOS

July 11, 2023

Citrix Files for iOS helps you exchange files easily, securely and professionally.

Citrix Files for iOS is a file manager with tools that allow you to collaborate easily and get your work done from any iOS device —anytime, anywhere.

Download Citrix Files for iOS at Apple App Store.

For information about new features, see What's new.

System requirements

OS requirements

iOS 14 or later

Fixed issues

Fixed issues in 2370

- When sending a watermarked file to specific people, the watermark might not display. [SFIOS-7208]

- When sending a watermarked file to specific people, if the sign in option isn't checked, information might improperly display. [SFIOS-7209]

- Selecting **Add a link** several times might cause an error. [SFIOS-7214]

- The **Add watermark** option isn't available in **Edit options**. [SFIOS-7215]

- Opening a shared file in co-editing might cause an error. [SFIOS-7216]

- When opening a file for view, the **Share** option doesn't work. [SFIOS-7219]

- Opening a checked out file with download permission might cause an error. [SFIOS-7233]

Fixed issues in 2360

- Creating a duplicate link might not deactivate the share link option. [SFIOS-7164]

- When sharing multiple files, the file list might display the entire list before selecting **Show all**. [SFIOS-7172]

- **Date added** might not display for photo and video uploads. [SFIOS-7199]

Fixed issues in 2355

- This release addresses issues that improve overall stability.

Fixed issues in 2350

- This release addresses issues that improve overall stability.

Fixed issues in 2340

- This release addresses issues that improve overall stability.

Fixed issues in 2320

- This release addresses issues that improve overall stability in XenMobile iOS.

Fixed issues in 2310

- This release addresses issues that improve overall stability.

Fixed issues in 22125

- This release addresses issues that improve overall stability.

Fixed issues in 2212

- This release addresses issues that improve overall stability.

Fixed issues in 2290

- Attempting to print Microsoft Office files might cause an error. [CCCHELP-2654]

Fixed issues in 2250

- This release addresses issues that improve overall stability.

Fixed issues in 2220

- Some PDF file annotations do not display until file content is tapped. [SFIOS-6768]

Fixed issues in 2210

- The number keypad alignment might be off when entering a pin. [SFIOS-6801]

Fixed issues in 21115

- This release addresses several issues that help to improve overall performance.

Fixed issues in 21110

- Adding people to a folder might cause Citrix Files to exit unexpectedly. [SFIOS-6794]

Fixed issues in 2190

- This release addresses several issues that help to improve overall performance.

Fixed issues in 2185

- This release addresses several issues that help to improve overall performance.

Fixed issues in 2175

- This release addresses several issues that help to improve overall performance.

Fixed issues in 2170

- This release addresses several issues that help to improve overall performance.

Fixed issues in 2150

After editing a video in the Photos for iOS app, attempting to upload the video might fail. [SFIOS-6684]

Fixed issues in 2120

- We are now integrating the Authman Lite SDK into Citrix Files to provide a more seamless experience across apps. [SFIOS-6303]
- This release also includes general security and user improvements. [SFIOS-6640]

Fixed issues in 2110

This release addresses several issues that help to improve overall performance and stability.

Fixed issues in 20112

Editing and saving a PowerPoint document might cause Citrix Files to exit unexpectedly. [SFIOS-6595]

Fixed issues in 20110

- Attempting to open files with the view only permission might cause an error. [CCCHELP-997]
- When accessing a shared link created in Citrix Files for Windows, Citrix Files for iOS might display an error. [CCCHELP-1096]
- PDF notes written with an iPad pen might be visible only on other iOS devices. [CCCHELP-1147]
- In Citrix Files for iOS, the **Cancel** button might not be localized. [SFIOS-6359]
- When opening a shared file from a non-linked Citrix Workspace account, Citrix Files might cause Citrix Workspace app to exit unexpectedly. [SFIOS-6590]

Fixed issues in 20100

- Hand written notes in Citrix Files might degrade after multiple saves. [CCCHELP-272]
- Opening a verified DocuSign PDF might cause an error. [CCCHELP-649]
- Canceling a print screen might disable the **Save** option. [SFIOS-6461]

Known issues

Known issues in 2120

Editing a text file might cause Citrix Files for iOS to fail. [SFIOS-6603]

Known issues in 2110

Editing a text file might cause Citrix Files for iOS to fail. [SFIOS-6603]

Known issues in 20112

Editing a text file might cause Citrix Files for iOS to fail. [SFIOS-6603]

Known issues in 20110

- Editing a PowerPoint document might cause Citrix Files for iOS to fail. [SFIOS-6595]
- Editing a text file might cause Citrix Files for iOS to fail. [SFIOS-6603]

Known issues in 20100

No new issues were observed in this release.

Co-editing using your iOS device

March 22, 2024

ShareFile offers users Microsoft Office 365 editing abilities in Citrix Files for iOS. This feature allows you to do the following:

- Live co-editing abilities with multiple users
- View all types of online files

- Edit Microsoft 365 files online
- View offline files
- Create new Microsoft Office files to share with users

Tips:

Though offline editing is not available, you can view offline files.

Prerequisites

- Users must have a ShareFile Advanced or Premium plan
- Users must have a supported Microsoft Office 365 plan and have the application installed on their device

Supported Microsoft Office 365 Plans

- Microsoft 365 Business Basics
- Microsoft 365 Business Standard
- Microsoft 365 Business Premium
- Microsoft 365 Apps for business

See Microsoft announces mobile editing availability for more subscribers for more information.

Disclaimer:

By enabling this feature, you are confirming that you have reviewed and agreed to the Microsoft Terms of Use and Privacy Policy linked. The **Preview** option is required for editing.

File type requirements

Microsoft requirements file type requirements for editing.

Application	Previewing Files	Editing Files
Word	.doc .docm .docx .dot .dotm .dotx .odt	.docm .docx
Excel	.xls .xlsm .xlsb .xlsx	.xlsb .xlsm .xlsx
PowerPoint	.pot .potm .potx .pps .ppsm .ppsx .ppt .pptm .pptx	.ppsx .pptx
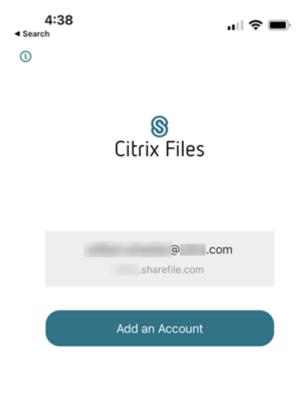
Open files to edit

The following information provides the steps necessary to open a Microsoft Office file in Citrix Files for iOS and make edits.

> **Note:**
>
> The Microsoft Office 365 application must be installed on your device and signed into before you can make edits to a particular file. For instance, you need the mobile version of Microsoft Word installed on your iOS device before you can make edits to a document file stored in ShareFile.

1. Open your Citrix Files app on your device.

2. Sign into your ShareFile account.

3. Navigate to the folder that contains the file you want to edit.

4:37
◀ Search

🕐 Recents

📁 Personal Folders

📁 Shared With Me

☆ Favorites

⓪ Queue

⚙ Settings

377

4. Select the file.

   The file opens and is viewable in Citrix Files.

5. Select **Actions**.

6. Select **Edit your documents in Microsoft Word**.

380
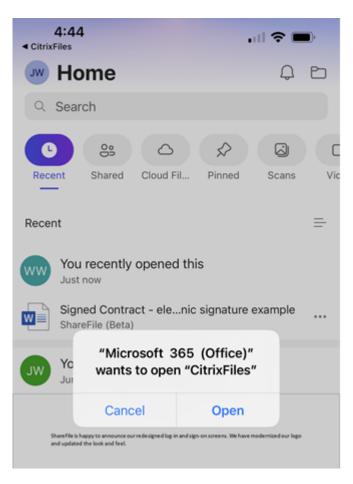
Microsoft Word for mobile opens with the document you selected to edit displaying.

7. Make the necessary edits in the Microsoft Word mobile application.

8. Select **Done**.

The **"Microsoft 365 (Office)"wants to open "CitrixFiles"** message displays.
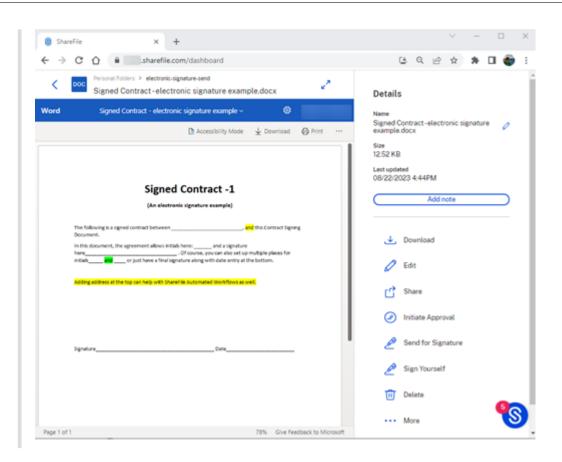
9. Select **Open**.

10. Return to your Citrix Files application to review the recent edits.

Note:

You can review the recent edits from your ShareFile account on the web or in ShareFile for Windows and Mac as well.
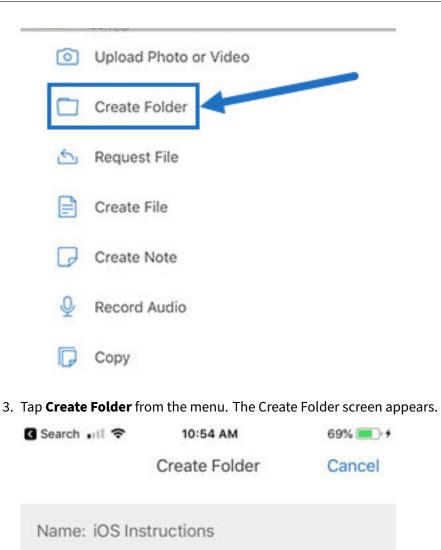
Create a folder
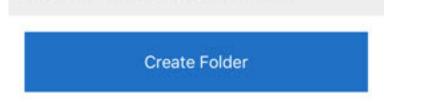
March 22, 2024

Use the following steps to create a folder in ShareFile using your iOS device.

1. Open Personal or Shared Folders where you want to create a new folder.

2. Tap the blue circle to open the menu. The menu appears.

3. Tap **Create Folder** from the menu. The Create Folder screen appears.

4. Type a name for the new folder and any notes in the corresponding sections.

5. Tap **Create Folder**. The new folder window appears.

Delete files

March 22, 2024
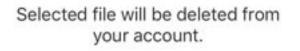
The following steps explain how to delete files in ShareFile using your iOS device.

1. Navigate on your device to the folder holding the file or files you want to delete.

2. Tap the ellipses.

3. Tap **Delete** from the menu. A confirmation screen displays.

4. Tap the red **Delete** on the confirmation screen to delete the file.

A "File deleted" message appears at the bottom of the screen.

Download Citrix Files app for iOS devices
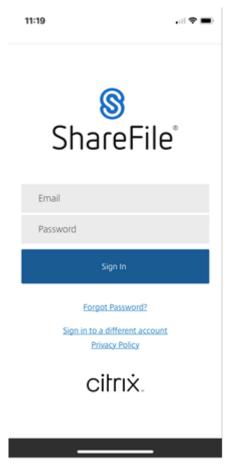
March 22, 2024

The following steps explain how to download Citrix Files for your device and log into your Citrix Files account.
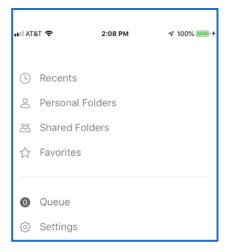
1. Open the App store application on your device.

2. Search for Citrix Files.

3. Tap **Get**.

4. Tap the Citrix Files icon to open.

5. Type your Citrix username and password.

Citrix Files opens displaying your folders.
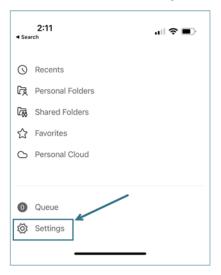
Send Logs

March 22, 2024

When you are consulting with **ShareFile Technical Support**, they might ask you to provide them a log file to assist them in diagnosing your problem.

The following provides the steps necessary to provide a log file for ShareFile Technical Support.

1. In the Citrix Files app, navigate to **Settings** and tap it.

2. Tap **About**.

3. Tap **Report an issue**.

ShareFile

4. Enter a description of your issue to assist the technical support representative, then tap **Submit**.

The confirmation message displays.

> **Note:**
>
> If you need further assistance, reference the number noted in the confirmation message when talking to the technical support representative.
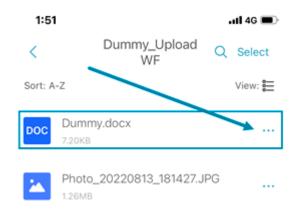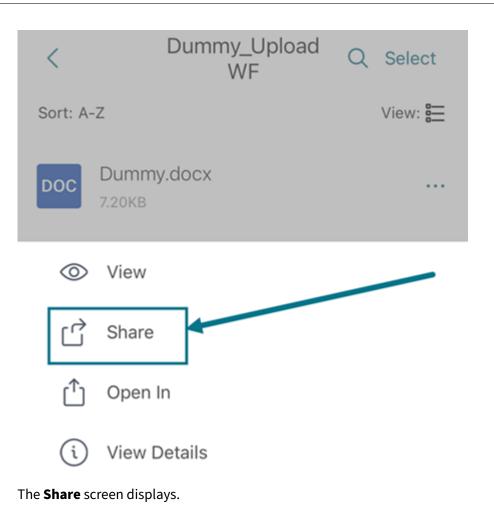
Share files

March 22, 2024

The following steps explain how to share files in ShareFile using your iOS device.

Getting a share link

1. Navigate on your device to the folder holding the file or files you want to share.

2. Tap the ellipses (**...**) next to the file name.

3. Tap **Share** from the menu.

The **Share** screen displays.
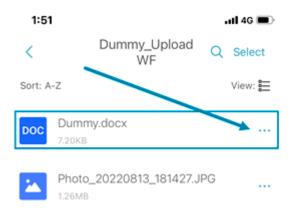
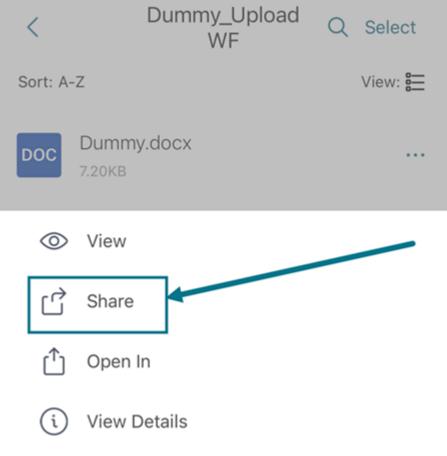4. Tap **Share** to get a link. Use the copied link to share with your email or another communication app.

Send to specific people

Use this option when you want to send using ShareFile to send a **Share** message to a specific person.

1. Navigate on your device to the folder holding the file or files you want to share.

2. Tap the ellipses (**...**) next to the file name.

3. Tap **Share** from the menu.

The **Share** screen displays.

4. Select **Send to specific people** under the options offered.

The **Send to specific people** message window displays.

5. Select **Edit options** to review and set the following options:

- **Access options**:

    - **Allow recipients to**: - select from various options including **View**, **Download**, and **Edit (sign in required)**.

    - **Access expires** - select from various expiration settings for recipients.

    - Check box for **Require recipients to sign in**.

    - **Downloads per user** - provides a restriction to the number of downloads if necessary.

    - Check box for **Always link to the latest version of the file**.

- **Notifications**:

    - Check box for **Notify me when this is accessed**.

    - Check box for **Send me a copy of this email**.

6. Type in the email address of the recipient in the **To** text box.

7. Though the **Subject** is prefilled, you can type in replacement text.

8. Type in a message if necessary.

9. Select the **Remember subject and message** slider to enable.

10. Tap **Send**.

Follow the instructions for your Mail app to send the message that includes the link. The recipient will receive a message similar to this:

Link options

Choose **...** to **Edit options** for the link, **Replace link**, or **Delete link**.

Edit options

In **Edit options**, you set the parameters for recipient access and notifications.

Access options   Under **Access options**, select the access parameters for the recipients.

- **Allow people with this link to**:

    - **View** - Recipients can only view the file in the **Preview** window.

    - **Download** - Recipients can download the file.

    - **Edit (sign in required)** - Recipients can edit the file but must sign in either with their client or employee sign-in. For information about co-editing a Microsoft 365 shared file, see Co-editing in ShareFile.

- **Who can access this link**:

    - **Anyone** (anonymous) - Recipients can only view the file in the **Preview** window.

    - **Anyone** (name and email required) - Recipients can download the file.

– **Client and employee users** (sign in required) - The recipient is presented with a sign-in screen. The recipient must be an existing user (either an employee or client user) in the account to sign in and view the content. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

– **Employee users** (sign in required) - The recipient is presented with a sign-in screen. The recipient must be an existing employee user in the account to sign in. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

- **Access expires** can be adjusted to the available presets.

- **Always link to the latest version of the file** is selected by default. The current version of the file is immediately available within the link.

- **Add watermark** allows you to track documents by user. This includes printing. If the user has download permissions, the watermark does not appear while viewing.

Notifications   This check box default is set for the sender of the file to receive notifications when the file is accessed. If you prefer not to receive this notification, uncheck the box.

Replace link

Replace link allows you to create a new link with the same permissions. The old link becomes inaccessible.

Delete link

Delete link allows you to make the link inaccessible. A new link is created by starting the share process again.

Add more items

To add more items to a share link, select **Add more items**.

You are provided the option to add more files from ShareFile or from your device.

Upload files

March 22, 2024

The following steps explain how to upload files in ShareFile using your iOS device.

1. Tap the **+** circle to open the menu. The menu displays.

2. Tap **Upload File**.

3. Select **Browse** to navigate to the file you wish to upload from your device.

4. Tap the file you want to upload.

5. If desired, add a description in the **Details** field.

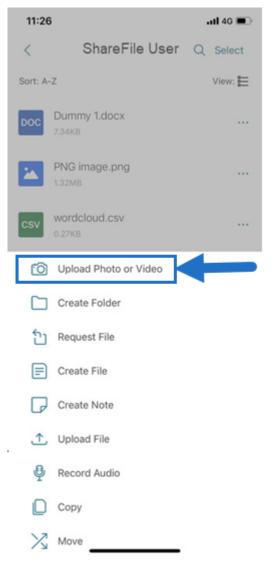6. Select **Edit** to change the upload destination in your ShareFile account.

7. Tap **Upload**.

> **Note:**
>
> You might change the default File Prefix.

Upload photo and video files

March 22, 2024

The following steps explain how to upload files in ShareFile using your iOS device.

1. Tap the **+** circle to open the menu. The menu displays.

2. Tap Upload Photo or Video.

3. Choose an existing file to load or tap Take a Photo (or Video) on your device.

> **Note:**
>
> You might be asked to allow Citrix Files to access your Photos.

4. Select the items you want to upload. Tap Next.

5. Tap Upload.

> **Note:**
>
> You might change the default File Prefix.

View and download files

March 22, 2024

Once you download a file in ShareFile using your iOS device, the location and file type determine how you can view the file. The following steps use a photo for the type of file downloaded.

1. Navigate in your Citrix Files App to the folder holding the photo you want to download.

2. Tap the file name. The download begins immediately.

3. Go to the photo app to view the file.

ShareFile for Mac

March 14, 2024

ShareFile for Mac allows you to access your files directly through a mapped drive, providing a native Finder experience. Files are downloaded only when accessed, and temporarily stored on your computer. Changes made to the files are automatically saved back to the cloud. You can access more functionality through the right-click context menu and perform operations such as sharing or requesting of files.

> **Important:**
>
> For information regarding ShareFile for Mac and Apple Silicon, see Citrix Files for Mac and Apple Silicon.

For information about new features, see What's new.

For end-user help including downloading and sign in, see ShareFile for Mac Help.

Supported versions

Minimum supported version

- ShareFile for Mac v 2023.8.7 or later

Download the latest version of ShareFile for Mac at ShareFile Downloads.

System requirements

OS requirements

- macOS 10.15 or later

Other requirements

- Local administrator rights are needed to install the app.

Fixed issues

Fixed issues in 23.10

- ShareFile for Mac might sign out unexpectedly. [CFMAC-3586]
- ShareFile for Mac might sign out unexpectedly after closing. [CFMAC-3654]

Fixed issues in 23.8.7

Some ShareFile for Mac users might experience higher than usual CPU usage. [CFMAC-3572]

Fixed Issues in 23.3

- Citrix Files for Mac authentication for connectors might fail. [CFMAC-3401]

Fixed Issues in 22.10

- This release addresses issues that help to improve overall performance.

Fixed Issues in 22.4

- Citrix Files for Mac authentication prompt might not display when Citrix Workspace is installed. [CFMAC-3296]

Fixed Issues in 22.2

- Citrix Files for Mac might not complete an interrupted download. [CFMAC-3296]

Fixed Issues in 21.10

- Citrix Files for Mac might not launch after sign-on. [CFMAC-3224]
- Some items might not display correctly in the **Queue** tab. [CCCHELP-1355]
- Citrix Files for Mac might become unresponsive after authentication errors. [CFMAC-3260]
- Opening and editing some Adobe Creative Suite files might cause an error. [CFMAC-3228]
- Opening and editing some Vectorworks files might cause an error. [CFMAC-3228]

Fixed issues in 21.2

- The option to discard a checkout might not be available for administrators. [CCCHELP-1022]
- Some failed uploads might require a manual retry. [CCCHELP-1291]
- Some folder names containing a period might be treated as temporary files. [CCCHELP-1456]
- Some remote updates might not show in **Finder**. [CFMAC-3185]
- Client users with delete permission might not have the ability to use it. [CFMAC-3193]

Fixed issues in 20.9

- Saving Adobe Photoshop files might cause an error. [CFMAC-3179]
- When saving Adobe InDesign project files, the files might delete unexpectedly. [CFMAC-3179]

Fixed issues in 20.7.2

- This release addresses a number of issues that help to improve overall performance and stability.

Fixed issues in 20.7

- When editing a file in Catalina, the Finder icon might not appear. [CFMAC-3069]

- When saving Adobe After Effects project files, the files might delete unexpectedly. [CFMAC-3128]
- Attempts to edit a file in Adobe Photoshop might cause an error. [CFMAC-3128]
- When signing into a previously used Mac, a new device sign-in notification might be sent. [CFMAC-3137]
- Using Citrix Files for Mac might require you to re-authorize the application multiple times. [CFMAC-3158]

Fixed issues in 1911

- This fix addresses a sharing violation error that appeared on Microsoft Excel files. [CFMAC-3067]
- When using macOS Catalina, files might download to the cache when the user browses through the folder. [CFMAC-3076]

Fixed issues in 1910

- Moving the cache limit slider might toggle the beta flag on and off instead of changing the cache limit. [CFMAC-3045]
- Dutch localization might not display correctly. [CFMAC-3056]

Fixed issues in 1908

- Moving a subfolder and then deleting its parent folder might cause the subfolder to be removed. [CFMAC-2249]

Fixed issues in 1904

- Citrix Files for Mac might consume an excessive amount of CPU. [CFMAC-2719]
- Attempts to open files from the dashboard can fail for files that have not been opened previously. [CFMAC-2738]
- When editing a file or folder offline and going back online, the file might not be moved to a recovery folder. [CFMAC-2762]
- Users might have to reauthenticate by relaunching the app. [CFMAC-2765]
- Deleting files during offline sync might cause Citrix Files for Mac to exit unexpectedly. [CFMAC-2787]

Fixed issues in 4.6

- Citrix Files for Mac might exit unexpectedly when switching from dark to light mode or light to dark mode. [CFMAC-2661]

- Locally edited files might not update correctly if there's a new remote version. [CFMAC-2676]
- The database crawler might look up items without caching, which can consume a lot of CPU. [CFMAC-2684]
- File and folder might not stay up to date. [CFMAC-2695]

Known issues

Known issues in 21.10

Users who have Citrix Files v21.4 (19rc5) are required to manually install Citrix Files 21.10 for Mac.

Known issues in 21.2

- Users on Big Sur might be required to reboot several times to allow the extension. This known issue should be resolved with the release of Big Sur 11.3.

Known issues in 20.7

- This release includes partial Italian language support. Full Italian language support will be included in a future release. [CFMAC-3130]
- Authentication screens do not include Italian language support.

Known issues in 1911

- A file might not delete properly if it is open in another application. As a workaround, close all applications accessing a file before deleting it. [CFMAC-2998]

Known issues in 1910

- A file might not delete properly if it is open in another application. As a workaround, close all applications accessing a file before deleting it. [CFMAC-2998]

Known issues in 1908

- A file might not delete properly if it is open in another application. As a workaround, close all applications accessing a file before deleting it. [CFMAC-2998]

Known issues in 1904

- When opening and editing Adobe InDesign files, Citrix Files for Mac might not save the files and cause Adobe InDesign to exit unexpectedly. [CFMAC-2552]
- When installing Citrix Files for Mac for the first time, a kernel extension approval dialog appears.
- Restricted Zones are not supported. [SFWGTM-515]
- When using offline access, folders might not copy properly. [SFWGTM-2145]
- Items in the dashboard might not open when double-clicked. [SFWGTM-2387]

Known issues in 4.6

- When opening and editing Adobe InDesign files, Citrix Files for Mac might not save the files and cause Adobe InDesign to exit unexpectedly. [CFMAC-2552]
- When installing Citrix Files for Mac for the first time, a kernel extension approval dialog appears.
- Restricted Zones are not supported. [SFWGTM-515]
- When using offline access, folders might not copy properly. [SFWGTM-2145]
- Items in the dashboard might not open when double-clicked. [SFWGTM-2387]

Known issues in 4.5

- When opening and editing Adobe InDesign files, Citrix Files for Mac might not save the files and cause Adobe InDesign to exit unexpectedly. [CFMAC-2552]
- When installing Citrix Files for Mac for the first time, a kernel extension approval dialog appears.
- Restricted Zones are not supported. [SFWGTM-515]
- When using offline access, folders might not copy properly. [SFWGTM-2145]
- Items in the dashboard might not open when double-clicked. [SFWGTM-2387]

Known issues in 4.4

- When installing Citrix Files for Mac for the first time, a kernel extension approval dialog appears.
- Restricted Zones are not supported. [SFWGTM-515]
- When using offline access, folders might not copy properly. [SFWGTM-2145]
- Items in the dashboard might not open when double-clicked. [SFWGTM-2387]

Known issues in 4.3

- When installing Citrix Files for Mac for the first time, a kernel extension approval dialog appears.
- Restricted Zones are not supported. [SFWGTM-515]
- When using offline access, folders might not copy properly. [SFWGTM-2145]

- When using offline access, in-progress badges for files and folders might take longer than usual to update. [SFWGTM-2310]

Limitations

- Several features are temporarily disabled while there is no internet connectivity. These features will become available again when internet connectivity is restored.
- Restricted Zones are not supported.
- When opening and editing Adobe InDesign files, Citrix Files for Mac might not save the files and cause Adobe InDesign to exit unexpectedly.
- When using offline access, folders might not copy properly.
- Items in the dashboard might not open when double-clicked.

Add a place

February 14, 2024

Add a place allows you to have direct access to your Microsoft Office applications for Co-editing in ShareFile on your Mac.

> **Important!**
>
> When adding ShareFile direct access to your Microsoft Office account, be sure you use the same ShareFile sign-in for both the ShareFile desktop application and Add a place.

The following instructions explain the steps necessary to add ShareFile direct access to your Microsoft Office applications with your Mac.

1. Open your Microsoft Office application. This can be Word, PowerPoint, or Excel.

2. Navigate to **Open** > **Manage Storage Accounts**. The **Storage Accounts** popup displays.
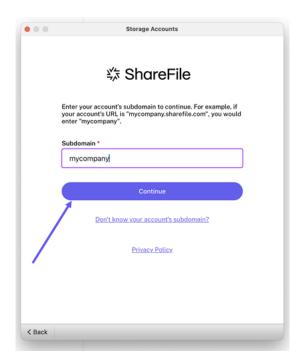
3. Select **ShareFile**. The ShareFile account subdomain pop-up displays.

4. Enter your ShareFile account subdomain.

5. Follow the prompts to authenticate with your email and password for ShareFile.

6. Select the aunthentication method you use to access your ShareFile account.
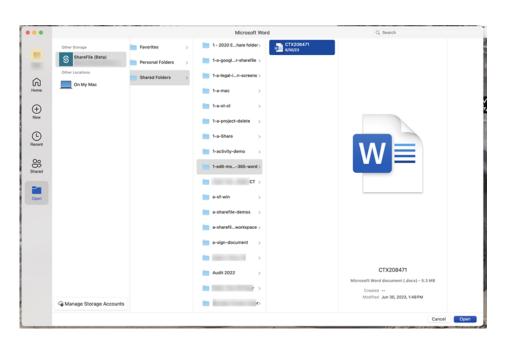
ShareFile

7. Enter the code provided by the authenticator selected in step 6.

8. Select **Verify**.

   Once you have signed on successfully, **ShareFile** will display under **Other storage**.

Your ShareFile account is now connected to **Add a Place** and this new location is accessible across Microsoft Word, Microsoft PowerPoint, and Microsoft Excel on the computer that you connected it to.

Removing ShareFile from Add a Place

Use the following steps to remove ShareFile from your Microsoft Office applications with your Mac.

1. Open your Microsoft Office application. This can be Word, PowerPoint, or Excel.

2. Navigate to **Open** > **Manage Storage Accounts**. The **Storage Accounts** popup displays.

3. Select the gray **X** next to **ShareFile**.

4. Select **Remove** to confirm your decision to remove **ShareFile** from other storage on your Mac.
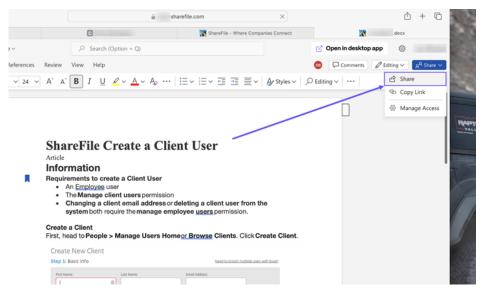
Co-editing a Microsoft Office file

November 22, 2023

Multiple users can edit a file simultaneously in ShareFile. To co-edit a document or create an active editing session, **Control-click** on the file to edit then select **Open with** > **Microsoft Word** (or other Microsoft Office application).

Use the following instructions to share file file for co-editing.

1. Use **Share** in to share the MS Office File you wish to co-edit.

The Share screen displays. Select **Send to specific people**.

2. After you enter the information requested, select **Send**.

Other users in the editing session are denoted by colored cursors within the document. You can also view editing users in the upper right corner of the editor menu.

For more information, see Co-editing in ShareFile

Delete files

August 3, 2023

The following steps explain how to delete files in ShareFile for Mac.

1. Select the file you want to delete.

2. Drag the file to Mac trash.

The file is no longer in your ShareFile account.

Download and open the app

February 14, 2024

Minimum supported version

- ShareFile for Mac v 2023.8.7 or later

Download the latest version of ShareFile for Mac at ShareFile Downloads.

Download ShareFile for Mac

The following steps explain how to download ShareFile for your Mac.

1. Download the installer.

2. Open the installer package and follow the prompts to install ShareFile. You might be required to provide an administrator password to complete the installation.

3. Once the installer opens, select **Continue** through the prompts.
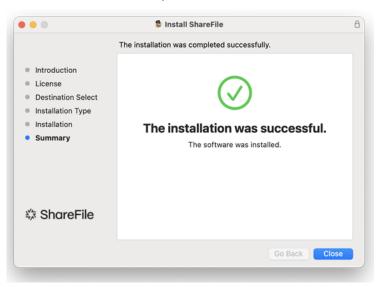
4. After reviewing the **License aggreement**, select **Agree**.

5. Select **Install**.

Once the installation completes, the Installation was successful screen displays.

6. Select **Close**.

Open ShareFile for Mac

Once the installation is completed, the ShareFile sign on process starts.

1. Type your account URL (enter "mycompany" for mycompany.sharefile.com) then **Continue**.

2. Type your email and password, then select **Sign In**.

3. Select how you would like to verify your device.
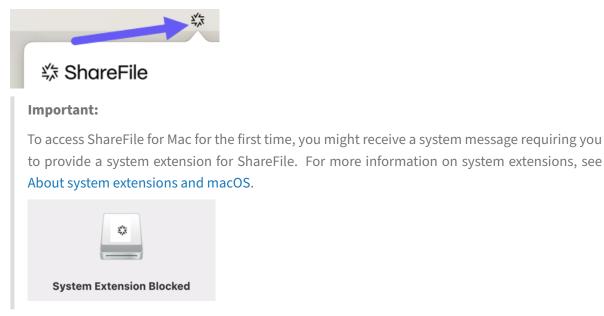
4. Enter the ciode you received to verify your device.

Once you are verified, the Welcome to ShareFile screen displays. Select **Continue** for tips on how to use your ShareFile for Mac application.

To access your ShareFile for Mac dashboard, see the Sharefile icon on the Mac bar.

Important:

To access ShareFile for Mac for the first time, you might receive a system message requiring you to provide a system extension for ShareFile. For more information on system extensions, see About system extensions and macOS.

Download and view files

August 3, 2023

The following steps explain how to download and view files using ShareFile for Mac.

1. Select the file you want to download from the ShareFile folder in finder.

---

2. Open the ShareFile folder in **Finder**.

3. Drag the file and drop on your desktop.

4. Double-click to open and view the file.

File Provider

February 14, 2024

ShareFile for Mac uses Apple's **FileProvider API** to sync data between your local Mac and online storage.

Supported versions

- macOS 11.0 or later

Download ShareFile for Mac.

Notable features

- **Easy installation**: Users do not have to configure system security, approve a kernel extension, or reboot.

- **Spotlight integration**: Accessed files and folders are indexed and appear in **Spotlight** search.

- **Co-editing**: ShareFile for Mac now supports co-editing with Microsoft Office 365.

Notable changes

- **Finder**: ShareFile is now listed as a location in the **Finder** sidebar.
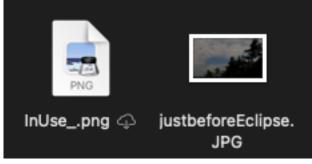
- **Offline settings**: Offline settings for files and folders are now managed by cloud icons.

  This new behavior is part of Apple's FileProvider API.

- **Cloud badges**: Cloud badges are no longer displayed for files and folders.

    – A cloud icon indicates that the file is not cached for offline use.
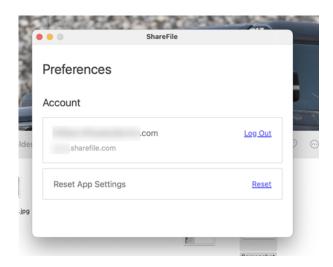
    – If there is no cloud icon next to a file, it means that the file is cached and available for offline use.

    – Clicking the cloud icon downloads the file.

    – Clicking the cloud icon of a folder downloads the entire folder and contents.

- **Badge overlay**: Badge overlay icons on files display differently.

- **Preferences**: Preferences have been adjusted.
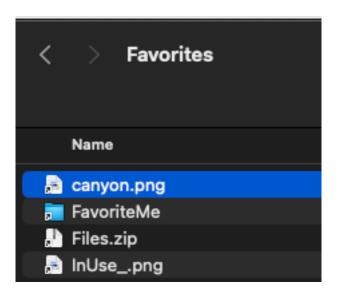
Settings regarding caching and Offline Sync are no longer applicable

- **Context menu**: Context menu options are adjusted.

- **Favorites**: The contents of the favorites folder now consists of shortcut links pointing to the original items.

FAQ about FileProvider

What happens to cached/offline data from the previous installation of ShareFile for Mac?

The files remain cached on the local system.

> **Notes:**
>
> - Choosing to remove offline data when using the Tech Preview will also remove data from the previously installed version of ShareFile for Mac.
> - Resetting app settings will remove cached data from the older version of ShareFile for Mac.

How do I go back to the normal version of ShareFile?
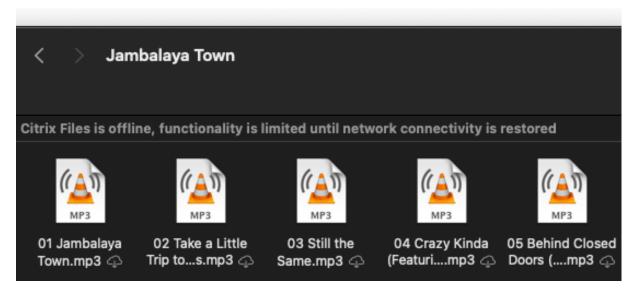
You can uninstall the app using the help menu. Install the current release of ShareFile from https://dl.sharefile.com/sfmac.

Where are the files I have downloaded/edited, cached?

The files in **Finder** are the actual files, there is no longer a corresponding cache folder for files that appear within ShareFile.

How does the app behave when going offline?
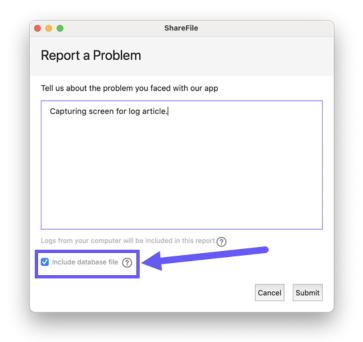
ShareFile files are placed into an offline state. In this state, only files and folders that have been previously cached, are accessible. Any changes made are queued up and ShareFile attempts to synchronize

your changes remotely when returning online.

What can I do when encountering an issue?

Please report any issues through the help menu before troubleshooting.
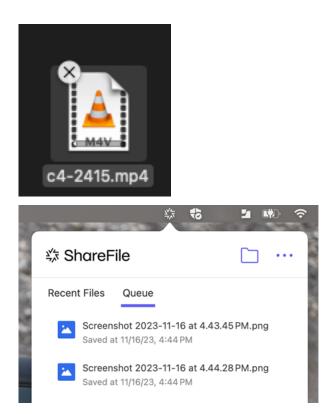
General known issues with workarounds

- **Files must be completely downloaded before opening (Ex: streaming a video file).**

    - **Workaround**: None.

- **Offline/Cached from previous versions of SFMac will not be available.**

    - **Workaround**: None.

- **Offline/Cached content from one account is lost when switching to a different account.**

    - **Workaround**: None.

    > **Note:**
    >
    > The app displays a warning and requires confirmation before removing content.

- **When upload/downloading the progress icon in Finder doesn't reflect the actual progress of the upload/download.**

    - **Workaround**: Use the dashboard's **Queue** tab to view progress.

ShareFile for Mac user guidance

September 27, 2023

ShareFile for Mac allows you to access your files directly through a mapped drive, providing a native Finder experience. Files are downloaded only when accessed, and temporarily stored on your computer. Changes made to the files are automatically saved back to the cloud. You can access more functionality through the right-click context menu and perform operations such as sharing or requesting of files.

User how-to articles

The following lists commonly used actions in ShareFile for Mac. Select from the list to learn more about a particular function or feature.

- Add a place

- Dashboard

- Delete files

- Download and open the app

- Download and view files

- Edit files

- Icon overlays

- Open files

- Send logs

- Share files

- Upload files

Icon overlays

August 3, 2023

Files and folders have an icon overlay that represents the status of that item. The following defines what each icon overlay represents:

Online only files: These files and folders are stored on the cloud. These files and folders are not stored on the local device.

> NOTE:
>
> When your device is not connected to the Internet, online only files and folders are not available.

Only files or folders marked as "Make available offline"display a green circle with the white check mark. These files or folders are downloaded to your device and are available offline.

Mixed state folder or **cached** file: This occurs when folder contents are in the various modes including online, offline, and cached.

> NOTE:
>
> When you open an online only file, it downloads to your device and becomes a cached file. You can open cached files anytime even without internet access. If you need to free up space, you can change the file back to online only. To do so, right-click the file and select **Make online only**.

The file or folder is syncing to the cloud. This means upload and downloads are currently in progress.

The file or folder is checked out.

Send Logs

August 3, 2023

When you are consulting with **ShareFile Technical Support**, they might ask you to provide them a log file to assist them in diagnosing your problem.
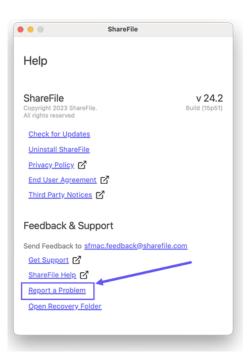
The following provides the steps necessary to provide a log file for ShareFile Technical Support.

1. Click the ShareFile logo in the Mac bar, then select **Help** from the ellipsis drop-down menu.

2. Select **Report a Problem**.
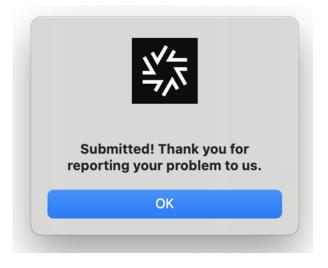
3. Enter any information to assist the technical support representative.

   Note:

   Check the box for **Include database files** if the technical support representative asks for it.

4. Select **Submit**. The confirmation message displays.
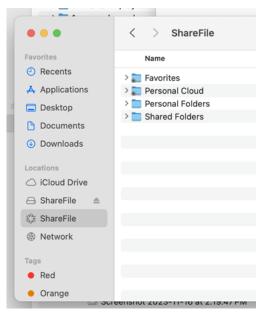
Open files

August 3, 2023

The following steps explain how to open files using ShareFile for Mac.

1. Open the ShareFile folder in Finder.

2. Select the file you want to open.

3. Double-click to open the file.

Share files

November 17, 2023

In Mac, sharing a file using your ShareFile account utilizes the ShareFile application for Mac. The following information provides the various methods and options in sharing a file.
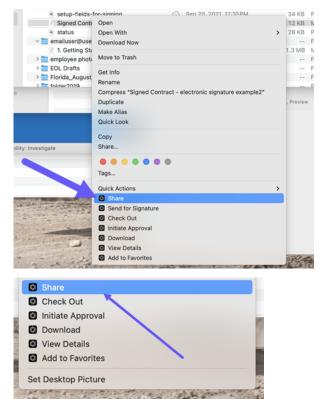
> **Important:**
>
> We're taking steps to improve the security posture of file sharing. All links default to use secure sharing options which apply across all ShareFile locations: ShareFile desktop app for Mac and Windows, ShareFile Web app, ShareFile Mobile app, ShareFile Plug-in for Microsoft Outlook and Gmail. See New secure sharing options to learn more about ShareFile secure sharing.

Creating a Share link

1. Navigate to the file that you want to share from the ShareFile folder in **Finder**.

2. To open the menu, use **Control-click** on the file you would like to share.

   The ShareFile for Mac menu displays.

3. Select **Share**.

The Share pop-up displays.

4. Select **Copy** by the link.

The **Link copied to your clipboard** message displays briefly.

5. Use the copied link to paste the share link with your email or another communication app.

Send to specific people

Use this option when you want to send using ShareFile to send a **Share** message to a specific person.

1. Navigate to the file that you want to share from the ShareFile folder in Finder.

2. To open the menu, use **Control-click** on the file you would like to share.

   The ShareFile for Mac menu displays.

3. Select **Share**.

   The Share pop-up displays.

4. Select **Send to specific people** under the options offered.

The **Send to specific people** message window displays.

5. If enabled, you can choose to **Encrypt this email** which provides an extra layer of security when sharing confidential files.

Tips:

- **Encrypt this email** allows you to encrypt the body of your message to your recipient, along with any attachments, with industry-standard AES 256 bit encryption. This feature also includes the ability to compose and receive encrypted emails directly from the ShareFile web application.

> • **Encrypt this email** is not available in the ShareFile **Standard** plan.

6. Select **Edit options** to review and set the following message options:

   • **Access options**:

     – **Allow recipients to**: - select from various options including **Download**, and **Edit (sign in required)**.

     – **Access expires** - select from various expiration settings for recipients.

     – Check box for **Require recipients to sign in**.

     – Check box for **Always link to the latest version of this file**.

     – Check box for **Add watermark**.

   • **Notifications**:

     – Check box for **Notify me when this is accessed**.

     – Check box for **Send me a copy of this email**.

7. Select **Save**.

8. Type in the email address of the recipient in the **To** text box.

9. Though the **Subject** is prefilled, you can type in replacement text.

10. Type in a message if necessary.

11. Select the **Remember subject and message** check box if wanted.

12. Select **Send**.

The **Share sent successfully** message displays briefly.

Link options

Choose **...** to **Edit link options**, **Replace link**, **Delete link**, or **Email with Mail App**.

Edit options

In **Edit options**, you set the parameters for recipient access and notifications.

Access options   Under **Access options**, select the access parameters for the recipients.

- **Allow people with this link to**:

  - **View** - Recipients can only view the file in the **Preview** window.

  - **Download** - Recipients can download the file.

  - **Edit (sign in Required)** - Recipients can edit the file but must sign in either with their client or employee sign-in. For information about co-editing a Microsoft 365 shared file, see Co-editing in ShareFile.

- **Who can access this link**:

  - **Anyone** (public) - Anyone can download what you're sharing without signing in.

  - **Anyone** (public, must enter name and email) - Recipients can download the file.

- **Client and employee users**(after signing in) - The recipient is presented with a sign-in screen. The recipient must be an existing user (either an employee or client user) in the account to sign in and view the content. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

- **Employee users** (after signing in) - The recipient is presented with a sign-in screen. The recipient must be an existing employee user in the account to sign in. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

- **Access expires** can be adjusted to the available presets.

- **Always link to the latest version of the file** is selected by default. The current version of the file is immediately available within the link.

- **Add watermark** allows you to track documents by user. This includes printing. If the user has download permissions, the watermark does not appear while viewing.

Notifications   This check box default is set for the sender of the file to receive notifications when the file is accessed. If you prefer not to receive this notification, uncheck the box.

Replace link

Replace link allows you to create a new link with the same permissions. The old link becomes inaccessible.

Delete link

e_DRAFT.docx

Delete link allows you to make the link inaccessible. A new link is created by starting the share process again.

Email with Mail app

Add more items

To add more items to a share link, select **Add more items**.

You are provided the option to add more files from ShareFile or from your device.

Upload files

August 3, 2023

The following steps explain how to upload files using ShareFile for Mac.

1. Select the file you want to upload.

2. Open the ShareFile folder in Finder.

3. Drag the file to the Citrix File folder in Finder. The upload success message displays.

ShareFile for Outlook

April 16, 2024

ShareFile for Outlook allows you to bypass Outlook's file size limit on attachments and add security to your attachments or emails. You can provide a secure file upload request directly in your email.

ShareFile for Outlook provides notifications to alert you when someone accesses a file or sends you a file. You can also set different security and access levels on a file-by-file basis.

For information about new features, see What's new.

Supported versions

Minimum supported version

- 22.1.10.0 or higher

Download ShareFile for Outlook here.

Download ShareFile for Outlook MSI here.

System requirements

OS requirements

- Windows 10 or later

.NET requirements

- Microsoft .NET Framework 4.8 or later

Microsoft Outlook version requirements

Important:

The ShareFile for Outlook plug-in is not compatible with the new Outlook for Windows. A new compatible version is coming soon.

- Microsoft Outlook 2007, 2010, 2013, 2016, 2019 (32-bit and 64-bit).
- Office 365 plans that include full, installed Office applications.

Note:

The local version of the plug-in is not compatible with Microsoft Outlook Express, Outlook for Mac, or web-based Outlook.

ShareFile requirements

- A ShareFile Advanced, Premium, or Virtual Data Room plan.
- The user must be an Employee user on the account.

Fixed issues

Fixed issues in 24.4.2.0

This release addresses issues that improve overall performance.

Fixed issues in 24.2.12

- After upgrading to the latest version, user default settings might not load. [SFOLP-1617]

Fixed issues in 24.2.10

- Email sign-in required option might reset to other options after closing Outlook. [SFOLP-1596]

Fixed issues in 23.10.6

- The expiration text in shared files and links might not follow the expiration policy set for the account. [SFOLP-1582]
- Some recipients might receive a link that is invalid. [SFOLP-1587]

Fixed issues in 23.7.3

- When re-enabling the plug-in, a start-up error might occur. [SFOLP-1578]

Fixed issues in 23.4.6

- When attaching a file outside of ShareFile, the file might lose its extension. [SFOLP-1546]
- When performing ShareFile actions, recipient categories on a new message might be reset. [SFOLP-1549]

Fixed issues in 22.7.5

- When viewing encrypted emails, Outlook might shut down unexpectedly. [SFOLP-1531]
- Multiple login prompts might occur when opening a new compose window. [SFOLP-1532]
- WebView2 might not install an update if the previous version is too old. [SFOLP-1533]

Fixed issues in 22.4

- Failure to send error message might not display after a failed encrypted email. [SFOLP-1525]
- The ability to install WebView2 twice might occur. [SFOLP-1528]

Fixed issues in 22.1

No fixed issues in this release.

Fixed issues in 21.10

- Resending a message with an attachment might fail. [SFOLP-1484]

Fixed issues in 21.9

- Sending encrypted emails might fail. [SFOLP-1474]
- Attempting a reauthentication, the authentication might fail. [SFOLP-1481]
- If sending a file when not signed into Citrix Files, the message might not work properly. [SFOLP-1485]
- When replying to emails, the Outlook reply window might go out of focus. [SFOLP-1494]
- Outlook Today feature might be disabled now that Internet Explorer is the default browser for Outlook. [SFOLP-1501]

Fixed issues in 6.7

- Changing networks might cause an error with Citrix Files for Outlook. [SFOLP-1369]
- When using the German version, starting a workflow might result in a wrong description. [SFOLP-1458]
- Attaching files to an encrypted email might cause an error. [SFOLP-1460]
- RTF formatted emails with photo attachments might fail on delivery. [SFOLP-1463]

Fixed issues in 6.6

- When dragging files into Citrix Files for Outlook, some files might not convert. [SFOLP-1436]
- Attempts to sign into Citrix Files for Outlook might fail when using Outlook 2013 and Outlook 2019. [SFOLP-1437]
- The options window might display with errors when using a resolution smaller than 1280 x 960. [SFOLP-1438]
- Attempts to re-open the Citrix Files for Outlook sign-in window might fail. [SFOLP-1447]

Fixed issues in 6.5.1

- The banner might not localize when attaching a file for the first time after changing the language under the "Encryption"toggle button. [SFOLP-1306]
- After attaching a file, the "Insert File"window might pop up again after the file is loaded. [SFOLP-1396]
- The English language might not show up as an available option when operating system culture is set to another country. [SFOLP-1398]
- "Convert Attachments"might not be disabled when the user isn't authenticated. [SFOLP-1399]
- Citrix Files for Outlook add-in might crash when building a culture list. [SFOLP-1401]

Fixed issues in 6.5

- Attachments might get converted to Citrix Files attachments even if the user is not signed in. [SFOLP-1307]
- Closing a folder that is still loading might display an incorrect folder when reopened. [SFOLP-1334]
- Attachments might be added as Citrix Files attachments even if the user is not signed in. [SFOLP-1355]
- Authentication intermittently fails when launching Outlook. [SFOLP-1360]

Fixed issues in 6.4

- The icon that displays on the welcome message after installing a new version of Citrix Files for Outlook might be pixelated. [SFOLP-1042]
- Users might have to manually authenticate again after using single sign-on to sign in. [SFOLP-1152]

Fixed issues in 6.3.1

- Recipients might not be able to access shares that require logon. [SFOLP-1051]

Fixed issues in 6.3

- When logging out from Citrix Workspace app, Citrix Files for Outlook might remain logged in. [SFOLP-1020]
- Citrix Files for Outlook might prompt to log on frequently. [SFOLP-1025]
- Attachments might auto-convert even if you are not logged on. [SFOLP-1046]

- Launching Microsoft Outlook after 15 minutes in a Citrix Virtual App or Citrix Virtual Desktop session would prompt for logon instead of using single sign-on. [SFOLP-1048]
- Top-level personal cloud connector folders can be selected to share. [SFOLP-1092]
- When personal cloud connectors are not configured, an empty logon page appears. [SFOLP-1093]
- Some settings are preserved after tokens have expired and a different user has logged on. [SFOLP-1128]

Fixed issues in 6.2

- Items might fail to attach if the email is saved as a draft. [SFOLP-984]
- The Custom Settings dialog might appear at the bottom of the screen. [SFOLP-990]
- The Citrix Attachments banner might appear outside of an email window. [SFOLP-1006]
- Special characters might not be allowed in email addresses. [SFOLP-1014]
- When using the per-machine install option, a ''Browser out of date''prompt might appear after entering a subdomain. [SFOLP-1018]

Known issues

Known issues in 6.5

No new issues have been observed in this release.

Known issues in 6.4

No new issues have been observed in this release.

Known issues in 6.3.1

No new issues have been observed in this release.

Known issues in 6.3

No new issues have been observed in this release.

Known issues in 6.2

No new issues have been observed in this release.

Access ShareFile in Outlook

July 30, 2023

> **Important:**
>
> The ShareFile for Outlook plugin is not compatible with the new Outlook for Windows. A new compatible version is coming soon.
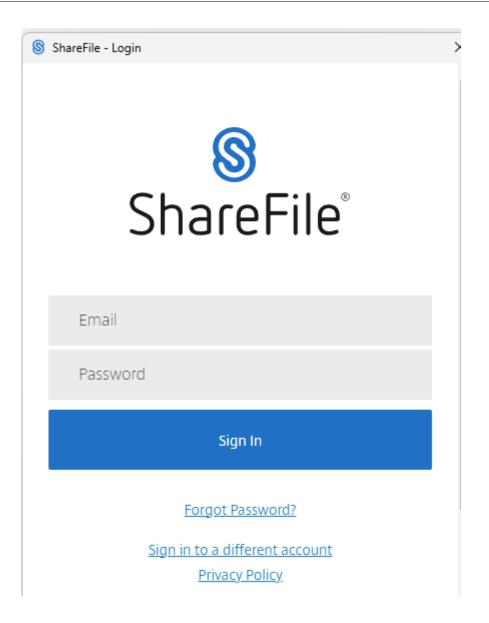
The following steps explain how to access ShareFile in Outlook.

1. Open **Outlook**. The ShareFile logo appears on the ribbon bar.

2. Select the ShareFile logo to log in (if necessary).

3. Log in using your ShareFile account credentials.

Change default settings for ShareFile for Outlook

August 7, 2023

You can change the default ShareFile settings in **Outlook**. Select the **Options** icon to access the menu.

The Outlook settings screen displays.

This allows you to make changes to the default settings under the following categories:

- **General** - Allows editing of General settings including

    - Attachments
    - Icon
    - **Access Options** - To change the default for files and link expiration, select **Edit** > **Access Options** > **Files and links expire after** > select the period of time you want to save as default. Click **Save**.

- **Attaching Files** - Allows editing of these components

    - Notifications
    - Access Options

- **Requesting Files** - Allows editing of these settings

    - Notifications
    - Access Options
    - Upload Location

- **Encrypted Email** - Allows editing of these encryption settings

    - Notifications
    - Access Options

- **Inserting Links** - Allows editing of these settings

    - Appearance
    - Linked Text
    - Language

Install ShareFile for Outlook

April 1, 2024

> **Important:**
>
> - The ShareFile for Outlook plugin is not compatible with the new Outlook for Windows. A new compatible version is coming soon.
>
> - The information presented here applies to the latest version of ShareFile for Outlook and can be referenced for previous versions of ShareFile Outlook Plug-in. To get the latest version of ShareFile for Outlook, visit dl.sharefile.com/outlookplugin.

For known issues all system requirements, please visit ShareFile for Outlook

Requirements and limitations
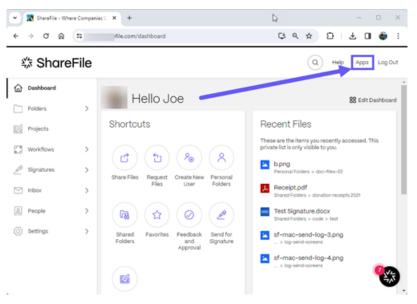
Review the following requirements and limitations before installing ShareFile for Outlook:

- In order to use the plugin, you must be an Employee user with the Personal File box permission enabled on your account. Being an employee user requires one license.

- The following plans do not include the ShareFile for Outlook plugin: Basic, Personal, Standard

- The following plans do not include Encrypted Email: VDR, Archiving, Per-User Personal, Team, Standard, FINRA Archiving

Basic installation

The following steps explain how to install ShareFile for Outlook.

1. Sign into your ShareFile account.

2. Select **Apps** in the upper right hand corner of the ShareFile dashboard.

   The ShareFile **Apps** page opens.

3. Select **Download** by ShareFile for Outlook.

4. Locate the downloaded installer file and run the installation by double-clicking the file.

   Notes:

   - Microsoft Outlook for Windows must be closed when the installation begins.

   - ShareFile or Outlook installs only for the current user. If you wish to install the plugin for all users on the PC, please refer to the Administrator installation section below.

5. Once the installation completes, open Microsoft Outlook.

Installation locations

- When installing a per-user version, the app will be installed in: `C:\Users\USERNAME\AppData\Local\ShareFile\ShareFile for Outlook`

- When installing a per-machine version of the OLP, the app will be installed in: `C:\Program Files (or x86)\ShareFile`

Authenticate your account

After installation, the initial login to Microsoft Outlook, users will be prompted to enter the subdomain of their Account URL. Next, Login with their Email Address and Password associated with their ShareFile account.

> **Note:**
>
> - If your email address and password are associated with more than one ShareFile account, you will be prompted to select the account you wish to link from a list.

If your account is set up to accept company credentials (single sign-on), click Login with my company credentials to be prompted to enter them at this time.

> **Notes:**
>
> - If your company has deployed ShareFile Restricted Zones and your default zone is a Restricted Zone, then you will be prompted to authenticate with your company credentials into that zone during the configuration of the plugin.
>
> - If your default zone is not a ShareFile Restricted Zone but you attempt to share a file from a Restricted Zone using the Outlook Plugin, you will also be prompted to authenticate into that zone with your company credentials.

Adminstrator installation

File name - `ShareFileForOutlook-PerMachine-version.msi` (per-machine install)

> **Notes:**
>
> - The file names for installer packages will change to the currently released version number.
>
> - The Per Machine MSI installer does not support the Auto-Update option.

Setting defaults

Administrators can automatically default and lock in preferences for the plugin in the Admin section of their ShareFile account. Navigate to **Advanced Preferences** > **Enable ShareFile Tools** > **Enable Outlook Plugin**.

Proxy configuration

ShareFile for Outlook must be configured to work with your proxy setup. To do so, close Microsoft Outlook and run: `ShareFileProxyConfig.exe` from `C:\Users\USERNAME\AppData\Local\ShareFIle\ShareFileforOutlook/`

> **Note:**
>
> If using an outdated version of the plugin, proxy config is located at `C:\Program Files (x86)\ShareFile\OutlookPlugin` or `C:\Program Files\ShareFile\OutlookPlugin`.

Adjust your proxy settings, then restart Microsoft Outlook.

Remove ShareFile in Outlook

September 12, 2023
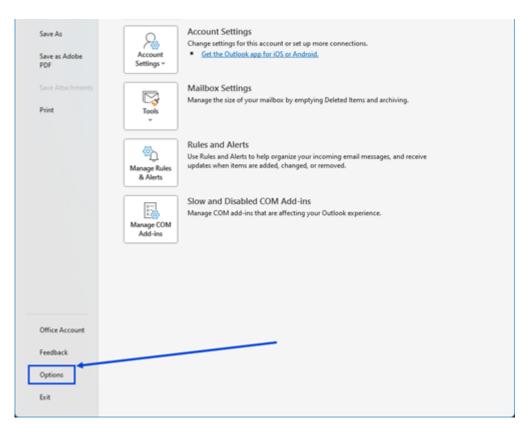
The following information provides the steps necessary to remove the ShareFile add-on from Outlook.

1. Open **Outlook**.

2. Select **File**.

3. Select **Options**.

4. Select **Add-ins**.

ShareFile

The **Add-in** window displays.

5. From the list of **Add-ins** select **ShareFile for Outlook**.

6. Select **Go** from Manage **COM Add-in**

The **COM Add-in** pop-up displays.

7. Select **ShareFile for Outlook** then select **Remove**.

8. Confirm you want to remove the add-in.
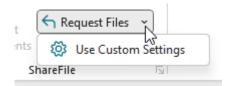
The **ShareFile for Outlook** add-in is removed.

Request files using ShareFile for Outlook

April 17, 2023

The following provides the steps necessary to request files using ShareFile in Outlook.

1. In Outlook, select the **New Email** icon to open a new message.

2. Select **Request Files** from the new message window then **Use Custom Settings** to select the upload location. The default is **File Box**.
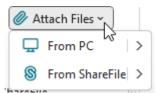
3. Select **Insert Link**.

Share files using ShareFile for Outlook

April 17, 2023

The following provides the steps necessary to share files using ShareFile.

1. In Outlook, select the **New Email** icon to open a new message.

2. Select **Attach Files** from the new message window. You have the choice to select **From PC** or **From ShareFile**.

3. Navigate the **Add from ShareFile** screen to select the files you want to share.

4. Click **OK** to create the ShareFile attachment to your message.

5. Select **Send**.

ShareFile for Outlook Online

September 20, 2023

ShareFile for Outlook Online is a feature app available for ShareFile Advanced and Premium customers when using their Outlook Online account.

ShareFile for Outlook Online allows you to bypass file size restrictions and add security to your attachments or emails by sending them through ShareFile. You can provide a secure file upload request for co-workers, customers, and partners directly in your email.

To access the ShareFile for Outlook Online add-in, go to Microsoft AppSource.

See ShareFile for Outlook Online User Guidance for help in getting started with ShareFile for Outlook Online.

System requirements

Microsoft account requirements

- Outlook.com
- Office 365
- Microsoft Exchange

    - 2013 SP1
    - 2016

Outlook requirements

- Outlook WebApp
- Outlook for Mac 2016 or later (version 15.33 or later)
- Outlook for Windows 2013 or later is supported
- For more information, see Microsoft Office requirements

Cookie and pop-up requirements

Use the following cookie and pop-up settings to allow ShareFile for Outlook Online to work efficiently.

Required cookies

1. Enable third-party cookies for the following specific URLs:

   - `sf-outlook-api.sharefile.io`
   - `outlook.office.com`

2. Enable all third-party cookies.

   > **Note:**
   >
   > For more information for specific browser cookie settings, see:
   >
   > - Chrome
   > - Microsoft Edge
   > - Firefox
   > - Safari

Required pop-ups

1. Enable site specific pop-ups:

   - `outlook.office.com`

2. Enable all pop-ups.

   > **Note:**
   >
   > For more information for specific browser pop-up settings, see:
   >
   > - Chrome
   > - Microsoft Edge
   > - Firefox
   > - Safari

Fixed issues

There are currently no fixed issues.

Known issues

There are currently no known issues.
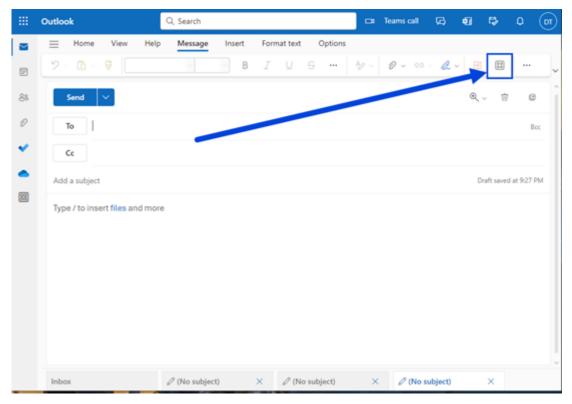
Adding and accessing ShareFile for Outlook Online

September 14, 2023

Adding ShareFile for Outlook Online

The following steps explain how to add ShareFile for Outlook Online.

1. Navigate to your Outlook online account.

2. Select **New mail**.

3. Select the **Apps** icon in the Outlook ribbon bar.

4. Select **Add apps**.

5. Type `ShareFile` into the search field on the **Apps** page.

6. Select the **ShareFile** app.

7. Select **Add**.

8. Select the **ShareFile** icon in the Outlook Online ribbon bar.
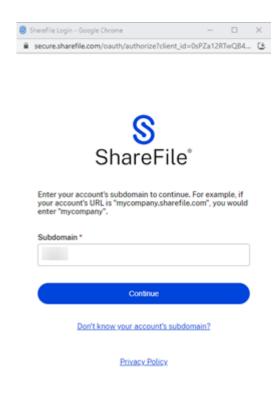
9. Select **Sign In** on the ShareFile welcome screen.

10. Type your account URL (enter "mycompany" for mycompany.sharefile.com) then Continue.

ShareFile

11. Type your email and password, then select Sign In.

Note:

You might be asked to verify your account using a verification code sent by the method you choose. Enter the code to continue with your ShareFile for Outlook Online account.

Change default settings for ShareFile for Outlook Online
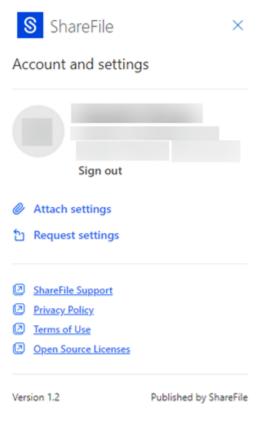
January 25, 2024

You can change the default ShareFile settings in **Outlook Online**. Select the **ShareFile** icon to access **Settings**.

ShareFile

The Outlook settings screen displays.

This allows you to make changes to the default settings for both **Attach settings** and **Request settings**.

Attach settings

You can review and set the following attach settings:
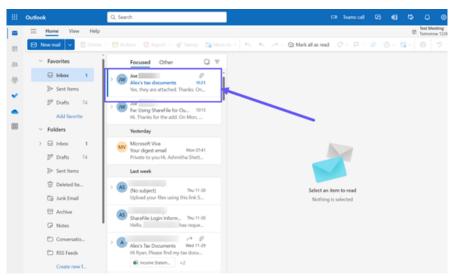
- **Access options**:

    - **Who can access this link** - select from the following:

        * **Anyone** (name and email required)

        * **Email recipients** (sign-in required)

        * **Anyone** (anonymous)

- **Access expires** - select the period of time you want to save as default.

- **Notifications**:

– Check box for **Notify me when files are accessed**.

Request settings

You can review and set the following request settings:

- **Access options**:

    - **Who can access this link** - select from the following:

        * **Anyone** (name and email required)

        * **Email recipients** (sign-in required)

        * **Anyone** (anonymous)

- **Access expires** - select the period of time you want to save as default.

- **Notifications**:

    - Check box for **Notify me when files are accessed**.

- **Upload location** - the default is set to your **File Box** but you can set another ShareFile folder for the requested file.

All settings can be changed when creating a Request Files link or a Send Files link in ShareFile for Outlook Online.
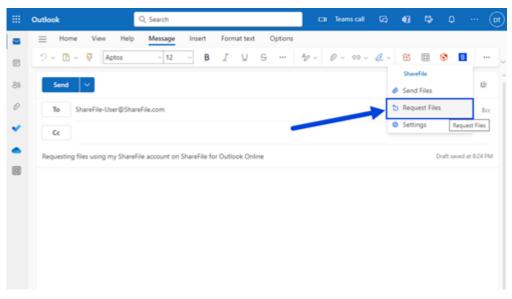
Requesting files using ShareFile in Outlook Online

September 14, 2023

Use the following instructions to request files using ShareFile in Outlook Online.

1. Navigate to your Outlook Online account.

2. Select **New mail** to open up a new message window.

3. Select the **ShareFile** icon in the Outlook Online ribbon bar.
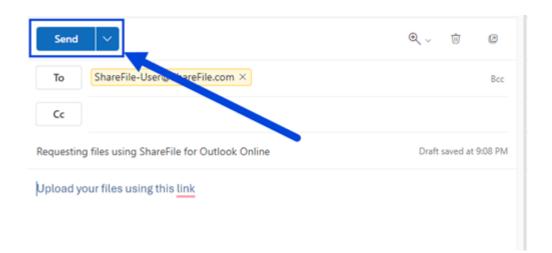
4. Select **Request Files** from the drop-down menu.

5. You can edit the request settings or accept the default settings and continue to the next step.

6. Select **Request** to enter the request link to your message.

7. Verify your recipients, the Subject, and optional message to requesting a file, then select **Send**.

ShareFile

Request File settings

Before creating the request link you can review and set the following request settings:

- **Access options**:

  - **Who can access this link** - select from the following:

    - **Anyone** (name and email required)

    - **Email recipients** (sign-in required)

    - **Anyone** (anonymous)

- **Access expires** - select the period of time you want to save as default.

- **Notifications**:

  - Check box for **Notify me when files are accessed**.

- **Upload location** - the default is set to your **File Box** but you can set another ShareFile folder for the requested file.

Save Outlook Online emails with ShareFile

December 11, 2023

Use the following steps to seamlessly save entire email threads and attachments directly to ShareFile using your Microsoft Outlook Online account.
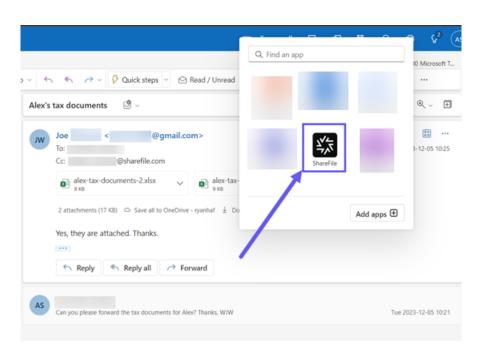
1. Open the email thread you want to save.
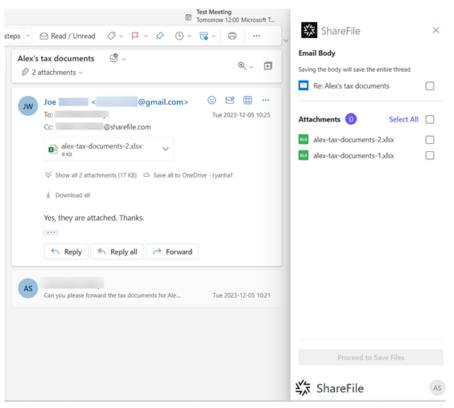
2. Select the apps icon in Outlook Online.

3. Select the ShareFile icon in Outlook Online apps.
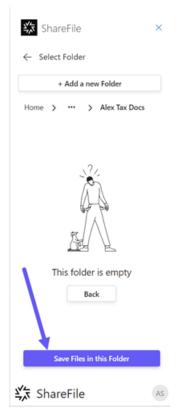
4. Select the email and any attachment of file(s) you want to save.

5. Select the destination folder or create a new one in ShareFile.

6. Select **Save Files in this folder**.

The email and the selected attachments are now available in your ShareFile account.

7. Select **See File on ShareFile** to open the ShareFile web app.

Sending files using ShareFile in Outlook Online

September 14, 2023

Use the following instructions to request a file using ShareFile for Outlook Online.

Send files from your ShareFile account
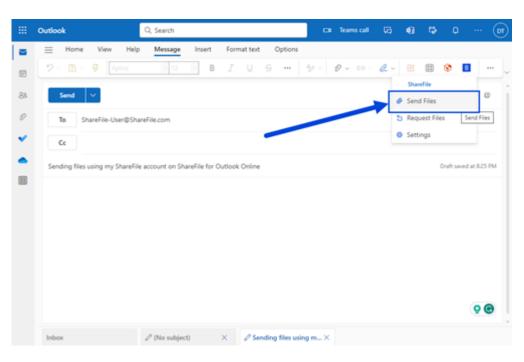
Use the following instructions to share files using ShareFile in Outlook Online.

1. Navigate to your Outlook Online account.

2. Select **New mail** to open up a new message window.

3. Select the ShareFile icon in the Outlook Online ribbon bar.
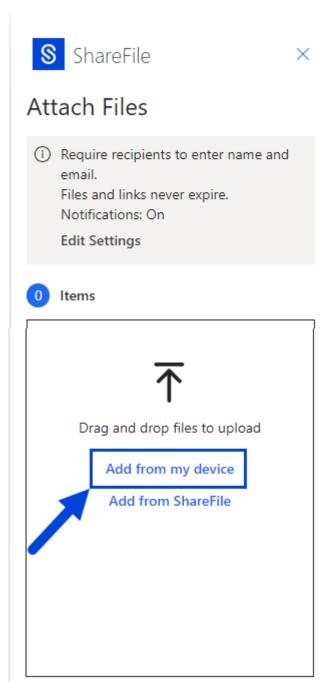
4. Select **Send Files** from the drop-down menu.

You can choose between the following options for attaching a file:

- Add from my device
- Add from ShareFile

Add from my device

1. Select **Add from my device**.

2. Navigate to the the file you wish to upload from your device.
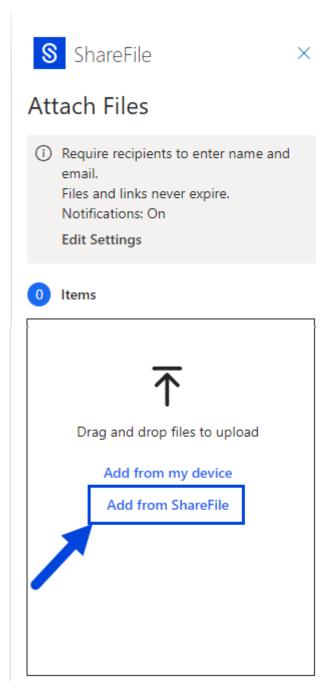
3. Select **Open**.

4. Verify your receipients, the Subject, and optional message, then select **Send**.

Add from ShareFile

1. Select **Add from ShareFile**.

2. Navigate to the the file you wish to upload from your ShareFile account.

1. Select **Add**.

2. Verify your recipients, the Subject, and optional message, then select **Send**.

Send File settings

Before creating the request link you can review and set the following request settings:

- **Access options**:

  - **Who can access this link** - select from the following:

    * **Anyone** (name and email required)

    * **Email recipients** (sign-in required)

    * **Anyone** (anonymous)

- **Access expires** - select the period of time you want to save as default.

- **Notifications**:

  - Check box for **Notify me when files are accessed**.

ShareFile for Windows

April 10, 2024

Download ShareFile for Windows

Download ShareFile for Windows installer files here.

ShareFile for Windows allows you to access your files directly through a mapped drive, providing a native Windows Explorer experience. Files are downloaded only when accessed, and temporarily stored on your computer. Changes made to the files are automatically saved back to the cloud. You can access more functionality through the Windows right-click context menu and perform operations such as sharing or requesting of files.

For information about new features, see What's new.

For end-user help including downloading and sign in, see ShareFile for Windows User Help.

Supported versions

Minimum supported version

- Citrix Files for Windows v 23.4.8.0 or higher

System requirements

OS requirements

- Windows 10 or later
- Windows Server 2012 R2 or later

VDA requirements

- XenApp and XenDesktop 7.15 LTSR, XenApp and XenDesktop 7.18, or Citrix Virtual Apps and Desktops 7 1808 or later

Other requirements

- Local administrator rights are needed to install the app.
- .NET 4.7.1 Framework is required

Fixed issues

Fixed issues in 24.3.3

- Free disk space might display the wrong value after canceling a file copy. [SFWIN-3617]

Fixed issues in 24.2.2

This release addresses issues that improve overall stability.

Fixed issues in 24.1.26

- Localization might not be applied to root folders. [SFWIN-3591]
- ShareFile for Windows icon might not appear in the system tray. [SFWIN-3572]
- Pinned applications might not appear after reboot.. [SFWIN-3578]
- Updated the feedback email address for new ShareFile Help Center. [SFWIN-3558]

Fixed issues in 23.10.14

- File conflicts might occur when frequent changes are made to a file. [SFWIN-3082]
- The manage permission dialog might not handle Super User Group properly. [SFWIN-3097]

- A ShareFile for Windows session might cause the application to not close properly. [SFWIN-3520]

Fixed issues in 23.7.10

Some ShareFile for Windows users might experience higher than usual CPU usage. [CCCHELP_4385]

Fixed issues in 23.7

- Some deleted files with unsaved changes might not be recovered from the recycle bin. [SFWIN-3399]
- Using remote wipe might cause an infinite restart loop. [SFWIN-3485]

Fixed issues in 23.4

- Saving Excel files using OneDrive for Business connector might cause a file conflict. [SFWIN-3381]
- Google Drive connector might not mount initially. [SFWIN-3388]
- Desktop icons might not display properly. [SFWIN-3392]
- Adding a client user to a folder might cause an error. [SFWIN-3409]
- Renaming a connector folder might cause an error. [SFWIN-3419]
- Renaming a connector folder remotely might cause an error. [SFWIN-3455]
- Renaming desktop icons might cause a position change. [SFWIN-3457]

Fixed issues in 22.11

- Clicking the reset button in the **Sync** window might not release the selected folders. [SFWIN-3169]
- Selecting **Cancel** after modifying a folder in **Sync** might fail. [SFWIN-3358]
- Modifying a folder in **Sync** to "Make online only"might cause an error. [SFWIN-3358]
- Uploading a file might cause a conflict if a previously deleted file had the same name. [SFWIN-3363]
- Saving to a sub-folder might cause a permission error to display. [SFWIN-3364]

Fixed issues in 22.8

- **Clone user** checkbox might not work when adding folder permissions.[SFWIN-3325]
- CBFS driver might remain after new installation of Citrix Files for Windows. [SFWIN-3331]

- On non-English systems, an assert error box might display. [SFWIN-3337]
- **Get a Link** and **Request a Link** might show invalid access levels based on account settings. [SFWIN-3343]
- Office file changes might cause an inaccurate conflict detection notification. [SFWIN-3345]

Fixed issues in 22.5

- The correct error icon might not display when a network connection is unavailable. [SFWIN-2732]
- The virus status for some files might not display after a refresh. [SFWIN-3269]
- Driver conflicts might occur with Windows Docker containers. [SFWIN-3285]
- Autoupdates might fail to install. [SFWIN-3290]
- The Citrix Files for Windows auto-updater might run cmd.exe indirectly. [SFWIN-3292]
- The Citrix Files for Windows installer might re-install WebView2. [SFWIN-3294]
- When utilizing the **Get a Link** function, the notify task might fail. [SFWIN-3323]

Fixed issues in 22.3

- Checking files in or out within a SharePoint connector folder might cause an error. [SFWIN-3218]
- If the local cache is manually deleted while uploading files, a failure to upload might not display. [SFWIN-3223]
- Modified dates might not display the correct information with saved WordPerfect files. [SFWIN-3241]

Fixed issues in 22.1

- Folders moved remotely might cause an error. [SFWIN-3172]
- Some network share connectors might not display a check out option. [SFWIN-3185]
- Automatic selection of a client certificate might fail. [SFWIN-3190]
- The accidental creation of item names with invalid Unicode characters might cause an error. [SFWIN-3207]
- Files might not update when there is no change in file size. [SFWIN-3212]

Fixed issues in 21.10

- Uploading files with certain Unicode characters might fail. [SFWIN-3145]
- File contents might not be updated when versioning is turned off. [SFWIN-3153]
- **Get a Link** option for connector folders and files might fail. [SFWIN-3168]
- Moving folders might result in high CPU utilization. [SFWIN-3180]

Fixed issues in 21.7

- Attempts to move a folder might cause the application to fail. [SFWIN-3018]
- Files that are renamed remotely might appear twice. [SFWIN-3073]

Fixed issues in 21.5

- A file might display the wrong upload time when accessed in another time zone. [SFWIN-2740]
- After versioning is disabled for a folder, the ability to check files in and out of the folder might continue. [SFWIN-2743]
- The offline sync window might display an incorrect content size. [SFWIN-2760]
- When leaving files open during sign out, the cache might not clear. [SFWIN-2775]
- After signing out, the **Confirm Sign Out** window might remain on the screen after revoking the device. [SFWIN-2778]
- When remotely updating a file, the file might modify the date of the parent folder. [SFWIN-3030]
- Files saved with a CAPS application might not sync to the cloud. [SFWIN-3066]
- The **Manage Folder Permissions** window might not display permission content for some users. [SFWIN-3077]

Fixed issues in 21.2

- Rotating an image file in Windows Photo Viewer might delete the original file. [CCCHELP-376]
- Attempting to connect to CNS servers might fail. [CCCHELP-868]
- Accessing restricted zone folders might cause an authentication issue. [CCCHELP-932]
- Saving AutoCad and AutoCadLT files might not include temp files. [CCCHELP-989]
- Some files and folders created in Citrix Files might not sync. [CCCHELP-1008]
- Authentication might fail causing the error message: "Failed to retrieve two factor backup options, please try again."[CCCHELP-1366]
- Saved AutoCad and AutoCadLT .dwg files in Citrix Files might display as .bak files. [CCCHELP-1369]
- Attempting to sign in using workspace authentication might cause a script error. [CCCHELP-1379]
- Citrix Files for Windows might provide an incorrect URL during a redirect. [CCCHELP-1590]
- Modified AutoCad Revit files might not save to the cloud in Citrix Files for Windows. [SFWIN-3052]
- Using WebView2 might cause a large cache file. [SFWIN-3054]
- WebView2 might suffer compatibility issues during login on older machines. [SFWIN-3063]

Fixed issues in 20.9

- Opening Citrix Files for Windows might cause high memory usage. [SFWIN-2911]
- Cloud contents moved to a new local folder might disappear if the local folder isn't created successfully. [SFWIN-2915]
- Local cache might fail if sign in is unsuccessful. [SFWIN-2916]
- Attempts to create files and folders might fail after an unsuccessful sign-in. [SFWIN-2916]
- Using the overwrite option during a file upload conflict might not work. [SFWIN-2919]
- Authentication might fail in some environments. [SFWIN-2920]

Fixed issues in 20.7

- Attempting multiple edits using Excel might cause an error message. [SFWIN-2809]

Fixed issues in 2032

- Files and folders displaying in Citrix Files for Windows might differ from the WebApp. [CCCHELP-186]
- Some PowerPoint files might lose images when stored with Citrix Files for Windows. [CCCHELP-186]
- Citrix files might error out after logout and synchronization stops working [CCCHELP-186]
- Excel files might be deleted after editing in Citrix Files for Windows. [CCCHELP-68]
- Opening and saving Excel files might cause an error message. [CCCHELP-111]
- Citrix Files for Windows content refresh might cause an error. [CCCHELP-150]
- Changing networks might cause an error with Citrix Files for Windows. [SFWIN-2780]
- Folders in Citrix Files for Windows might display as files. [CCCHELP-55]
- Citrix Files for Windows might fail to download files to a location with a long path name. [SFWIN-2597]
- Overlay icons might not appear consistently on files in connectors. [SFWIN-2610]
- Single sign-on might not work correctly on certain deployments. When this occurs, an error message appears: "We're sorry, access is not allowed because you have out-of-date software." [SFWIN-2641]
- Citrix Files for Windows might display a warning about unsaved changes to files when exiting. [PD-1404]
- SSO might fail using SAML with Azure AD. [SFWIN-2783]

> **Note:**
>
> The user agent during authentication is now: Mozilla/5.0 (Windows NT; Win64; x64; Trident/7.0; rv:) like Gecko NT, is the kernel version of the Windows Operating System and RV is the version

> of Internet Explorer/Edge installed.

Fixed issues in 1912

- Citrix Files for Windows might fail to download files to a location with a long path name. [SFWIN-2597]
- Overlay icons might not appear consistently on files in connectors. [SFWIN-2610]
- Single sign-on might not work correctly on certain deployments. When this occurs, an error message appears: "We're sorry, access is not allowed because you have out-of-date software." [SFWIN-2641]

Fixed issues in 1909

- The Last Modified Date on folders might not update correctly when changing files inside the folder. [SFWIN-2397]
- Citrix Files for Windows might not save the PDF correctly after editing a file in Adobe Acrobat. [SFWIN-2543]
- Certain Windows applications might exit unexpectedly intermittently. [SFWIN-2559]
- Users are not prompted to authenticate again after failure to authenticate when using network share connectors. [SFWIN-2570]
- Microsoft Office files might be deleted from Citrix Files after saving. [SFWIN-2596]

Fixed issues in 1907

- Citrix Files fail to mount in certain environments. [SFWIN-1775]
- Folders with large image and video files might take longer than normal to load. [SFWIN-2273]
- Offline files might not be accessible if the files remained offline. [SFWIN-2464]
- AutoCAD files with changes might remove older versions of uploaded files. [SFWIN-2470]
- When Citrix Files for Windows is signed in without a network connection, offline files cannot be edited. [SFWIN-2483]

Fixed issues in 5.0

- AutoCAD files might be randomly deleted. [SFWIN-2094]
- When users open a changed file, the content in the file might be outdated. [SFWIN-2132]
- Opening files might incorrectly show a conflict message [SFWIN-2267]
- Exporting a document as a PDF might fail.

Fixed issues in 4.6

- An "Incorrect function"error message appears when accessing the mapped Citrix Files drive. [SFWIN-2009]
- Files saved using Microsoft Edge might not upload correctly. [SFWIN-2113]
- When a user's AppData system variable points to a UNC path, Citrix Files for Windows exits unexpectedly. [SFWIN-2117]
- PDF files might get corrupted when saving. [SFWIN-2120]

Fixed issues in 4.5

- PDF files edited using Bluebeam become corrupted. [SFWIN-1451]
- Citrix Files incorrectly shows "Your access token might be expired or revoked"when logged on to a VDA. [SFWIN-1686]
- After upgrading Citrix Files, the application maps to the wrong drive letter. [SFWIN-1819]
- Saving to a Citrix Files location eventually corrupts the saved file. [SFWIN-1890]
- Disconnecting or changing networks might cause Citrix Files to exit unexpectedly. [SFWIN-1967]

Fixed issues in 4.4

- Citrix Files might consume high memory. [SFWIN-1502]
- When saving a file to Citrix Files, high latency might occur. [SFWIN-1556]
- Users might see outdated versions of files. [SFWIN-1570]
- Citrix Files might perform slowly. [SFWIN-1642]
- Citrix Files might not save .dwg files from AutoCAD. [SFWIN-1669]
- Jupyter Notebooks keep adding new checkpoint folders into Citrix Files. [SFWIN-1676]
- Windows Explorer might freeze when opening a folder. [SFWIN-1707]
- When editing files with Blue Beam, zero-byte files might get uploaded. [SFWIN-1758]
- Moving folders from Citrix Files to the local machine might not transfer files inside the folder. [SFWIN-1782]

Fixed issues in 4.3

- Project files might become corrupt when opened. [SFWIN-1437]
- When storing app data using Fslogix, Citrix Files might not work. [SFWIN-1460]
- When renaming a file before it is fully uploaded to the server, two files might be created locally. [SFWIN-1468]
- When using SAML single sign-on in a VDA, the automatic logon might not work. [SFWIN-1507]
- PDF files might become corrupt when opening or editing. [SFWIN-1509]

- File and folders might be mismatched between Citrix Files remotely and locally. [SFWIN-1524]
- When saving a file to the Citrix Files drive, the drive might write slowly. [SFWIN-1556]
- When right-clicking a file, the context menu might not appear. [SFWIN-1559]
- The Last Modified Date on files might not be consistent. [SFWIN-1670]

Known issues

Known issues in 22.5

No new issues have been observed in this release.

Known issues in 1912

No new issues have been observed in this release.

Known issues in 1909

No new issues have been observed in this release.

Known issues in 1907

No new issues have been observed in this release.

Known issues in 5.0

- Certain third party software might interfere with Citrix Files for Windows'ability to mount the folder structure. For more information and workarounds, see Knowledge Center article CTX250001.
- Citrix Files for Windows fails to mount on Windows 10. A recent Windows update in version 1809 introduced issues with drive mounting. For more information and workarounds on mapped drives and Windows 10 1809, see Windows Support.
- Accessing folders with large amounts of multimedia files causes slow loading times. For workarounds, see Knowledge Center article CTX241253.
- Renaming a file or folder to the same name with different case does not work. [SFWIN-1711]

Known issues in 4.6

- Upgrading from version 4.5 to version 4.6 with Beta features enabled while uploads are occur‐ring cancels those uploads. As a workaround, wait for your uploads to complete before you upgrade.
- Citrix Files for Windows fails to mount on Windows 10. A recent Windows update (version 1809) introduced issues with drive mounting. For more information and workarounds on mapped drives and Windows 10 1809, see Windows Support.
- Accessing folders with large amounts of multimedia files causes slow loading times. For workarounds, see Knowledge Center article CTX241253.
- Renaming a file or folder to the same name with different case does not work. [SFWIN-1711]

Known issues in 4.5

- Citrix Files for Windows fails to mount on Windows 10. A recent Windows update (version 1809) introduced issues with drive mounting. For more information and workarounds on mapped drives and Windows 10 1809, see Windows Support.
- Renaming a file or folder to the same name with different case does not work. [SFWIN-1532]

Known issues in 4.4

- Citrix Files for Windows fails to mount on Windows 10. A recent Windows update (version 1809) introduced issues with drive mounting. For more information and workarounds on mapped drives and Windows 10 1809, see Windows Support.
- Renaming a file or folder to the same name with different case does not work. [SFWIN-1532]

Known issues in 4.3

No new issues have been observed in this release.

Limitations

Dynamic Disk Fair Sharing (used on Windows Server operating systems) may cause folder explorer operations to hang. As a workaround, you can disable Disk Fair Sharing. This can be done using the following PowerShell Script:

```
1   $temp = (gwmi win32_terminalservicesetting -N "root\cimv2\
        terminalservices")
2   $temp.enableDiskFSS = 0
3   $temp.put()
```

```
4  <!--NeedCopy-->
```

You can verify the changes via the following PowerShell command:

```
1    (gwmi win32_terminalservicesetting -N "root\cimv2\terminalservices")
2  <!--NeedCopy-->
```

For additional information see: Fair Share technologies are enabled by default in Remote Desktop Services.

> The following information was previously published on Knowledge Center article CTX228273.

- Does not support ARM based processors.
- Several features are temporarily disabled while there is no internet connectivity. These features will become available again when internet connectivity is restored.
- Uninstalling the Citrix Files app removes the currently signed in user's local AppData, but does not remove any other user's Citrix Files AppData on that machine. As a workaround, remove the `C:\users\<user>\Appdata\Local\Citrix\Citrix Files\` and `C:\Users\<user>\AppData\Roaming\Citrix\Citrix Files` directories for each user.
- Users might see "Failed to execute action"when signing in. As a workaround, clear the folder `C:\Users\<user>\AppData\Roaming\Citrix\Citrix Files` and restart the app.
- Attempts to create or rename a folder, giving it the same name as that of a child folder inside it, can fail. The issue occurs if you don't have permission to see the namesake child folder inside.
- Windows Explorer performance might be degraded if browsing a folder containing a large-sized .exe file. As a workaround, users can wait momentarily while Explorer responds.
- Windows Explorer performance might be degraded if browsing a folder containing a large number of image or video files. For more information, see Knowledge Center article CTX241253.
- Files are not displayed when browsing a long folder path exceeding 260 characters.
- When changing drive letters for Citrix Files, the left navigation pane might not refresh to the new drive letter immediately. As a workaround, navigate to the PC folder and then into your new drive letter.
- Citrix Files for Windows fails to mount on Windows 10. A recent Windows update in version 1809 introduced issues with drive mounting. For more information and workarounds on mapped drives and Windows 10 1809, see Windows Support.
- File or folder names starting with the ~ symbol cannot be uploaded.
- When copying a file to a different folder, earlier versions of the file might not be copied over. This issue applies only to copy operations. It does not apply to move operations.
- Renaming a file or a folder to the same name with different case is not allowed.
- Editing a checked-out file might result in errors if the user does not have the delete permission. As a workaround, give the user delete permissions for that particular folder, or do not check out and edit the file.

- Temporary Office files might be seen in Windows Explorer during editing of a file. As a workaround, refresh the Explorer view to remove the temp files.
- Mount points configured for the OneDrive for Business subfolder might intermittently fail to load. As a workaround, create the mount point to point to the root of the connector.
- Restricted zones are not supported.
- When attempting to delete a file from Citrix Files, the file temporarily disappears from the Explorer view and then reappears within a few seconds. Along with it, a system notification message appears, stating that the delete operation failed. The issue occurs when the user does not have delete permissions.

Add a place

February 14, 2024

Add a place allows you to have direct access to your Microsoft Office applications for Co-editing in ShareFile on your PC using Windows.

The following instructions explain the steps necessary to add ShareFile direct access to your Microsoft Office applications with Windows.

1. Open your Microsoft Office application. This can be Word, PowerPoint, or Excel.

2. Navigate to **File** > **Open** > **Add a Place**.

3. Select **ShareFile**. The ShareFile sign-on pop-up displays.

4. Enter your ShareFile account subdomain.

5. Follow the prompts to authenticate with your email and password for ShareFile or use **Sign in with my company credentials** if your account leverages single sign-on for authentication.

Once you have signed on successfully, **ShareFile** will display under **Other locations**.

Your ShareFile account is now connected to **Add a Place** and this new location is accessible across Microsoft Word, Microsoft PowerPoint, and Microsoft Excel on the computer that you connected it to.

Removing ShareFile from Add a Place

Use the following steps to remove ShareFile from your Microsoft Office applications with Windows.

1. Open your Microsoft Office application. This can be Word, PowerPoint, or Excel.

2. Navigate to **File** > **Account** > **Connected Services**.

3. Select **Remove** next to **ShareFile**.

4. Select **Yes** to confirm your decision to remove **ShareFile** in the pop-up.

> **Note:**
>
> Add a place open in desktop will work only if the user's default zone is ShareFile-managed cloud storage.

Accessing the dashboard

July 11, 2023

Access the dashboard by selecting the **ShareFile** icon in the Windows system tray. The dashboard shows the recent uploaded files. You can also access your Settings and other options by clicking the (…) in the top right corner of the dashboard.

Dashboard notes:

- The **Queue** tab displays up to 20 of the most recent uploaded files.

- To clear the queue, you must restart ShareFile for Windows. This is because queue information is stored in your desktop's memory.
- Newer entries replace older entries over time.

Create a folder

July 14, 2023

The following steps explain how to create and name a folder in ShareFile for Windows.

1. Open the ShareFile folder in Windows Explorer.

2. Navigate to the location where you want to create the new folder.

3. Right-click to open the Citrix Files menu.

4. Select **New** then **Folder**.

5. Using the new folder icon you created, type the name you want to use for the folder.
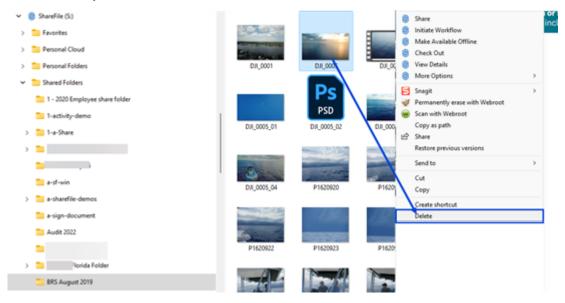
Delete files

July 14, 2023

The following steps explain how to delete files in ShareFile Files for Windows.

1. Select the file you want to delete.

2. Drag the file to the Windows Recycle Bin or right-click and select **Delete**.

The file is deleted.

> **Tip:**
>
> If you attempt to delete a file that *has not yet* uploaded to ShareFile, the file will be moved to the
> Recycle Bin via a local recovery folder.

Download, install, and open the ShareFile for Windows app

March 11, 2024
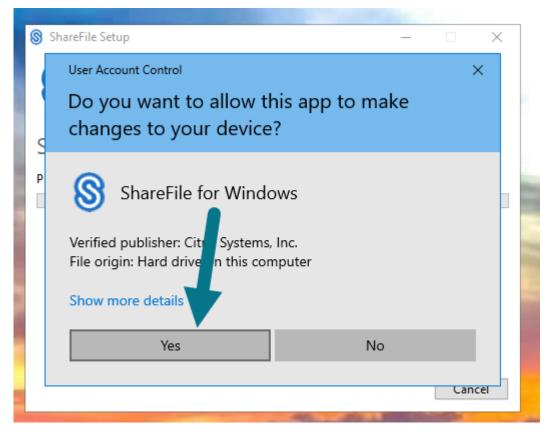
Download ShareFile for Windows installer

The following steps explain how to download and install ShareFile for Windows.
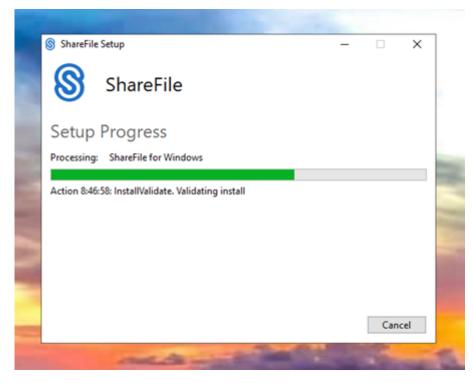
1. Download ShareFile for Windows installer files here.

2. Open the installer package and follow the prompts to install ShareFile. After reviewing the **License aggreement**, click the check box if you agree to the terms and conditions.

3. Select **Install**.

4. Select **Yes** on the **User Account Control** screen.

The **Setup Progress** screen displays.

5. Select **Launch** when the **Installation Successfully Completed** screen displays.

Open ShareFile for Windows
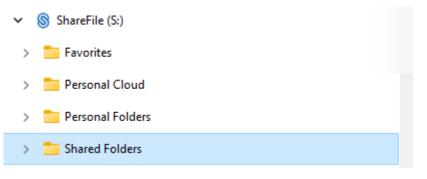
1. Select the **ShareFile** icon to open **ShareFile for Windows**.

2. Type your account URL (enter "mycompany" for mycompany.sharefile.com).

3. Type your email and password to sign in.

Open your ShareFile (S:) drive in Windows Explorer.

Troubleshooting install issues
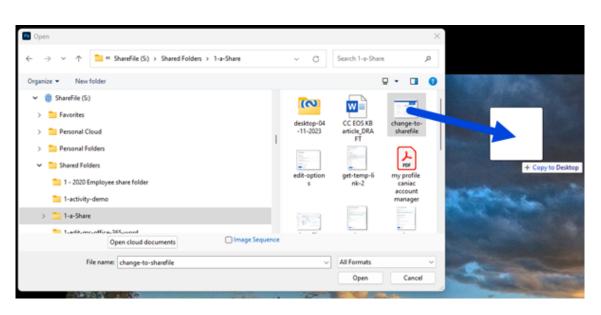
If you have installation failures, contact ShareFile Help Center for assistance.

Download and view files

July 14, 2023

The following steps explain how to download and view files using ShareFile for Windows.

1. Open the ShareFile folder in Windows Explorer.

2. Navigate to the file you want to download.

3. Drag the file and drop on your desktop.

4. Double-click to open and view the file.

Open and edit files
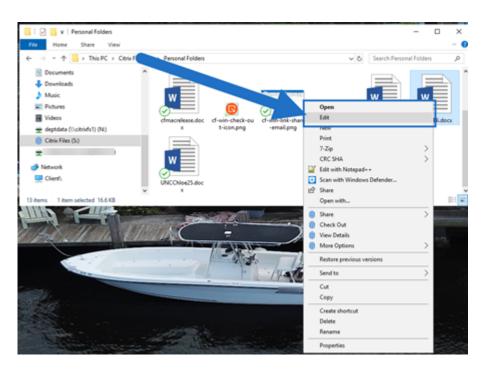
July 14, 2023

The following steps explain how to open and edit a file using ShareFile for Windows.

> Tip:
>
> Use this to open and edit files from many popular applications including Microsoft Office and Adobe.

1. Navigate to the file you want to open and edit from the ShareFile folder in Windows Explorer.

2. Right-click to open the Windows menu.

3. Select either **Open** or **Edit**. The file opens in the corresponding application.

4. After completing the edits, select **Save** from the application menu. The edits are saved in Citrix Files for Windows.

ShareFile for Windows Help

September 27, 2023

ShareFile for Windows allows you to access your files directly through a mapped drive. ShareFile provides a native Windows Explorer experience. Files are downloaded only when accessed and temporarily stored on your computer. Changes made to the files are automatically saved back to the cloud.

Download ShareFile for Windows

Download the new ShareFile for Windows at ShareFile for Windows download page.

> **TIP:**
>
> You can access more functionality through the Windows right-click context menu.

User how-to articles

The following lists commonly used actions in ShareFile for Windows. Select from the list to learn more about a particular function or feature.

- Add a place

- Accessing the dashboard

- Create a folder

- Delete files

- Download, install, and open ShareFile for Windows

- Download and view files

- Edit files

- Icon overlays

- Send logs

- Open files

- Settings

- Share files

- Upload files

- Version check for ShareFile for Windows

Icon overlays

July 10, 2023

Files and folders have an icon overlay that represents the status of that item. The following defines what each icon overlay represents:

Online only files: These files and folders are stored on the cloud. These files and folders are not stored on the local device.

> NOTE:
>
> When your device is not connected to the Internet, online only files and folders are not available.

Only files or folders marked as "Make available offline"display a green circle with the white check mark. These files or folders are downloaded to your device and are available offline.

Mixed state folder or **cached** file: This occurs when folder contents are in the various modes including online, offline, and cached.

> NOTE:
>
> When you open an online only file, it downloads to your device and becomes a cached file. You can open cached files anytime even without internet access. If you need to free up space, you can change the file back to online only. To do so, right-click the file and select **Make online only**.

The file or folder is syncing to the cloud. This means upload and downloads are currently in progress.

The file or folder is checked out.

Send Logs

July 11, 2023

When you are consulting with **ShareFile Technical Support**, they might ask you to provide them a log file to assist them in diagnosing your problem.

The following provides the steps necessary to provide a log file for ShareFile Technical Support.
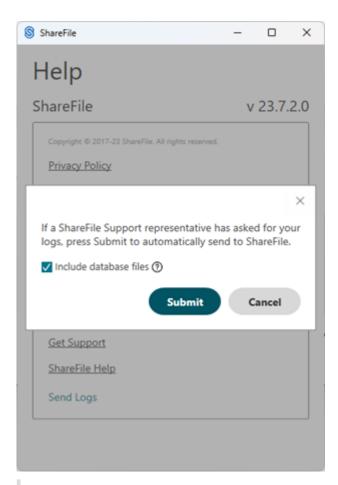
1. Right click on the ShareFile logo in the Windows system tray, then select **Help**.

2. Select **Send Logs**.
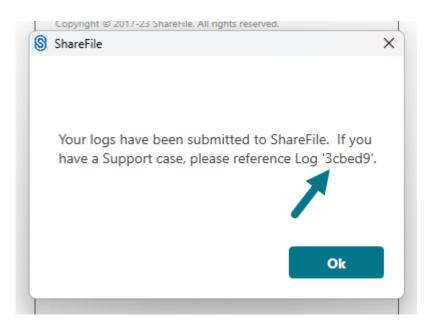
3. Select **Submit**.

Note:

Check the box for **Include database files** if the technical support representative asks for it.

4. Provide the Technical Support Representative with the reference log code.

Open files

July 17, 2023

The following steps explain how to open files using ShareFile for Windows.
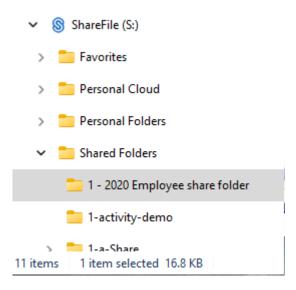
1. Navigate to and open the ShareFile (S:) drive in Windows Explorer.

2. Select the file you want to open.

3. Double-click to open the file.

Request files

July 17, 2023
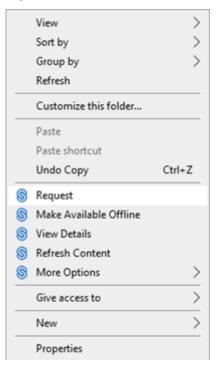
The following steps explain how to request a file(s) using ShareFile for Windows.

1. Navigate to and open the ShareFile (S:) drive in Windows Explorer.

2. Right-click in the folder you want the requested file to load then select **Request**.

The **Request files** popup displays.

3. Select either Request files - Get a link or Request Files- Send to specific people.

Request files - Get a link

1. Select **Get a link**.

   The **Get a link** popup displays.

2. Select **Copy** under the options offered.

   The **Link copied to your clipboard** message displays briefly.

3. Use the copied link to share with your email or another communication app.

Request files - Send to specific people

1. Select **Send to specific people**.

   The Send to specific people message window displays.

2. Select **Edit options** to review and set the following options:

- **Access options**:

    - **Access expires** - select from various expiration settings for recipients.

    - Check box for **Require recipients to sign in**.

- **Notifications**:

    - Check box for **Notify me when files are uploaded**.

    - Check box for **Send me a copy of this email**.

3. Select **Save**.

    Complete the **Send to specific people** screen.

4. Type in the email address of the recipient in the **To** text box.

5. Though the **Subject** is prefilled, you can type in replacement text.

6. Type in a message if necessary.

7. Select the **Remember subject and message** check box if wanted.

8. Select **Request**.

The Request is sent.

Settings menu

July 14, 2023

The following options are available in the **Settings** menu.

Account
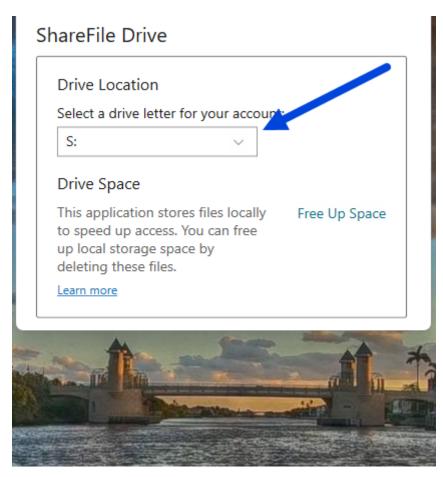
Sign Out - Signs you out of your Citrix Files account. Cached files are deleted.

Launch on Startup - Allows the application to start automatically after starting Windows.

Reset app - Allows you to reset the application to the original default settings.

ShareFile Drive

Drive Location - Allows you to select a drive letter for your Citrix Files account. Default is "**S**."

Drive Space - Files made available offline take up space on your local device. Use the **Free Up Space** option to remove files that are stored locally.

> NOTE:
>
> For more information on file status, see Icon overlays.

Offline Sync

Offline Sync allows you to select the ShareFile Folders that you would like to keep locally on your Windows PC. Individual files can be marked for offline usefrom the ShareFile drive in Windows Explorer.

1. Select **Manage** to open the **Manage Offline Sync** screen.

2. Once you seelect the ShareFile folders you want to manage locally, select **Save**.

Conflict Resolution

This setting allows you to select a file conflict option.

- **Prompt Always**: Prompts you to review the conflicted files.

- **Overwrite**: This option overwrites the existing file with an updated file.

- **Discard**: Discards the changes being made to the existing file.

    > TIP:
    >
    > We recommend you save a copy of an uploaded file to ensure you don't lose the file changes.

- **Save a Copy**: This option creates a copy of the conflicted file so both files remain.

Share files

November 17, 2023

In Windows, sharing a file using your ShareFile account uses the ShareFile application for Windows. The following information provides the various methods and options in sharing a file.

> **Important:**
>
> We're taking steps to improve the security posture of file sharing. All links default to use secure sharing options which apply across all ShareFile locations: ShareFile desktop app for Mac and Windows, ShareFile Web app, ShareFile Mobile app, ShareFile Plug-in for Microsoft Outlook and
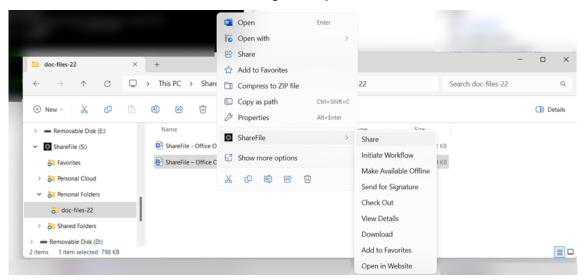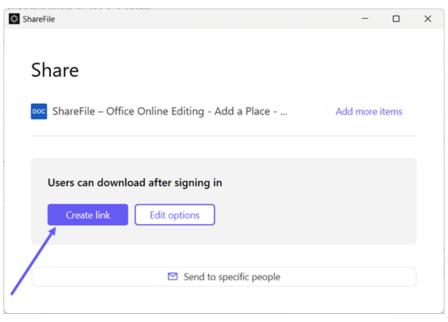
Gmail. See New secure sharing options to learn more about ShareFile secure sharing.

Getting a Share link

1. Navigate to the file that you want to share from the ShareFile folder in Windows Explorer.

2. Right-click the file.

3. Select **Share** from the menu selections designated by the ShareFile icon.

The Share pop-up displays.

4. Select **Create link** under the options offered.

   The **Link copied to your clipboard** message displays briefly.

5. Use the copied link to paste the share link with your email or another communication app.

Send to specific people

Use this option when you want to send using ShareFile to send a **Share** message to a specific person.

1. Navigate to the file that you want to share from the ShareFile folder in Windows Explorer.

2. Right-click the file.

3. Select **Share** from the menu selections designated by the ShareFile icon.

ShareFile

The Share pop-up displays.

4. Select **Send to specific people** under the options offered.

   The **Send to specific people** message window displays.

5. If enabled, you can choose to **Encrypt this email** which provides an extra layer of security when sharing confidential files.

Tips:

- **Encrypt this email** allows you to encrypt the body of your message to your recipient, along with any attachments, with industry-standard AES 256-bit encryption. This feature also includes the ability to compose and receive encrypted emails directly from the ShareFile web application.

> • **Encrypt this email** is not available in the ShareFile **Standard** plan.

6. Select **Edit options** to review and set the following options:

- **Access options**:

    - **Allow recipients to**: - select from various options including **View**, **Download**, and **Edit (sign in required)**.

    - **Access expires** - select from various expiration settings for recipients.

    - Checkbox for **Require recipients to sign in**.

    - **Downloads per user** - provides a restriction to the number of downloads if necessary.

    - Checkbox for **Always link to the latest version of the file**.

- **Notifications**:

    - Checkbox for **Notify me when this is accessed**.

    - Checkbox for **Send me a copy of this email**.

7. Select **Save**.

8. Type in the email address of the recipient in the **To** text box.

9. Though the **Subject** is prefilled, you can type in replacement text.

10. Type in a message if necessary.

11. Click the **Remember subject and message** checkbox if wanted.

12. Click **Send**.

The **Share sent successfully** message displays briefly.

Link options

Choose **…** to **Edit options** for the link, **Replace link**, or **Delete link**.

ShareFile

Edit options

In **Edit options**, you set the parameters for recipient access and notifications.

Access options   Under **Access options**, select the access parameters for the recipients.

- **Allow people with this link to**:

  - **Download** - Recipients can download the file.

  - **Edit (sign in Required)** - Recipients can edit the file but must sign in either with their client or employee sign-in. For information about co-editing a Microsoft 365 shared file, see Co-editing in ShareFile.

- **Who can access this link**:

  - **Anyone** (public) - Anyone can download what you're sharing without signing in.

  - **Anyone** (public, must enter name and email) - Recipients can download the file.

  - **Client and employee users**(after signing in) - The recipient is presented with a sign-in screen. The recipient must be an existing user (either an employee or client user) in the account to sign in and view the content. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

  - **Employee users** (after signing in) - The recipient is presented with a sign-in screen. The recipient must be an existing employee user in the account to sign in. If the recipient is not a user in the account, then it is necessary to create the user account for the recipient before they can access the file.

- **Access expires** can be adjusted to the available presets.

- **Always link to the latest version of the file** is selected by default. The current version of the file is immediately available within the link.

- **Add watermark** allows you to track documents by user. This includes printing. If the user has download permissions, the watermark does not appear while viewing.

Notifications   This checkbox default is set for the sender of the file to receive notifications when the file is accessed. If you prefer not to receive this notification, uncheck the box.

Replace link

Replace link allows you to create a new link with the same permissions. The old link becomes inaccessible.

Delete link

Delete link allows you to make the link inaccessible. A new link is created by starting the share process again.

Email with Mail app

Select this option to open your local email application with the link automatically added to the message.

Add more items

To add more items to a share link, select **Add more items**.
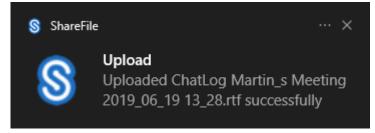
You are provided the option to add more files from ShareFile or from your device.

Upload files

July 24, 2023

The following steps explain how to upload files using ShareFile for Windows.

1. Select the file you want to upload.

2. Open the ShareFile folder.

3. Drag the file to the ShareFile (S:) drive in Windows Explorer. The upload success message displays.

Version and End Of Life check for ShareFile for Windows
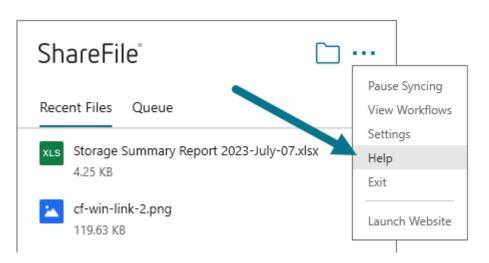
October 5, 2023

Use the two sets of directions in this article to do a standard version check or an end-of-life (EOL) check when using ShareFile for Windows.
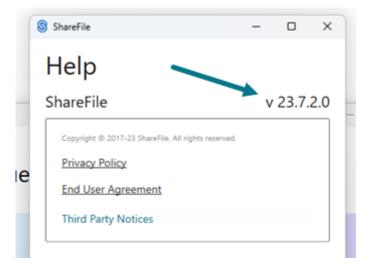
Version check - ShareFile for Windows

Use the following steps to locate the version of ShareFile for Windows you're currently using.

1. Navigate to the Windows system tray.

2. Right click on the ShareFile logo, then select **Help**.

The **Help** section displays allowing you to view the version number in the top right.

End Of Life version check - ShareFile for Windows

1. Navigate to the Windows system tray.

2. Right click on the ShareFile logo, then select **Help**.

The **Help** section displays allowing you to view the version number in the top right.

> **Note:**
>
> We support the four most current versions of ShareFile for Windows. Subscribe to the ShareFile product documentation RSS feed here to learn when updates to the ShareFile for Windows application are available.

3. To confirm your client version of ShareFile for Windows is EOL, continue to the next step to check the recent log.

4. Navigate to `C:\Users%USERNAME%\AppData\Local\Citrix\Citrix Files\Logs` in your Windows file explorer.

5. Order the files by clicking the **Date modified** column.

ShareFile

6. Search for the following keywords:

   - End Of Life
   - EOL

   If either of the keywords are found and exception message similar to the following will display.

```
2023-09-26T12:11:26.376|ERROR|0HMTULCK2F1OU-AppStartupError: unauthorized_client | Description:
SFWindows version 5.0.97.0 that is used by this account has reached End Of Life (EOL). Please upgrade
to a newer version of SFWindows. Please refer to ShareFile product documentation
https://docs.sharefile.com/en-us/sharefile/sharefile-app.html for current version
```

Signatures

October 2, 2023

ShareFile delivers an electronic signature ability using **Signatures**. An electronic signature, sometimes known as an e-signature, is the same as your handwritten signature on a paper document, except electronic —a mark on an electronic contract or document you make to demonstrate your intent to agree to the terms of that document.

Integrating **Signatures** with ShareFile gives you the power to obtain legally binding signatures on documents entirely online, being completed more quickly and securely than executing paper documents.

User guidance for Signatures

The following lists commonly used actions in **Signatures**. Select from the list to learn more about a particular function or feature.

- Create a signature request
- Decline signature
- Default settings
- Delete a listed request
- Force complete
- Sending a signature request to multiple recipients
- Status
- Templates
- Voiding a request

Create a signature request

November 1, 2023
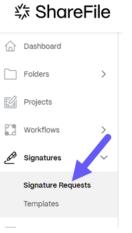
Use the following instructions to create a signature request in your ShareFile account.
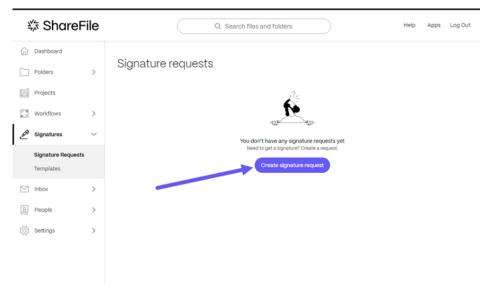
> **Note:**
>
> Only for accounts created after October 3rd, 2023

Use the following steps to create a signature request in ShareFile Signatures.

1. Sign into your ShareFile account.

2. Select **Signatures** > **Signature Requests**.

3. Select **Create signature request**.

4. Select a **Document to send** by dragging a file to the window or select **Browse files**.

5. Enter the recipient information including **Name** and **Email**.

6. Select if the recipient is to be a signer or viewer of the document.

> **Tips:**
>
> - **Add recipients** is an option if you must send the same document for multiple signers listed. For more information, see More
>
> - **Set signing order** toggle allows you to stagger the requests based on the order set during the request for addition signers. For more information, see Set signing order.

7. Select **Next Step**.

   The **Place fields** screen displays.

8. Select the fields that you want to add to the document then drag.

9. Select **Next Step**.

10. Verify the **Document name** and edit if necessary.

11. Select **Edit** to choose where you want the signed document to be stored or leave the default setting.

12. Add an optional note for the signer.

13. Set the expiration for the request.

Expiration

The document will no longer be available to sign after the specified number of days:

| 30 | day(s) | Expiration date: 10/28/2023 |

14. Select the **Passcode** toggle to generate a code the signer needs to open the signature request.

Security options

(X) **Passcode**

Recipients must enter a 5-digit passcode to access the documents.

15. Select the **Knowledge-Based Authentication** toggle to require recipients to verify their identity with a knowledge-based quiz. Each signer needs to independently verify before signing the document.

(X) **Knowledge-Based Authentication**

Require recipients to verify their identity with a knowledge-based quiz. Each signer will need to independently verify before signing the document.

> **Note:**
>
> Signers will be locked out of the document after 3 failed attempts.

16. Under **Default settings** select the optional **Edit Default settings** or skip to the next step. For more information on the setting options, see Default settings.

17. Select **Save** for changes to the default settings.

18. Select **Send signature request**.

Decline to sign

October 2, 2023
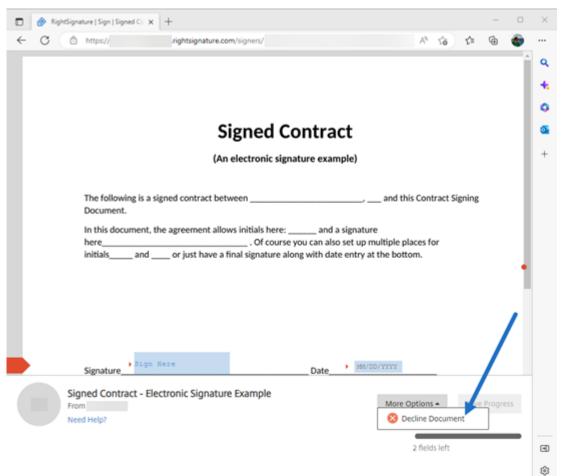
ShareFile Signatures provides signers the ability to decline to sign a document.

Instructions for the signer

The following instructions explain the process of a signer declining to sign a document.

1. You, the signer, receive a signature request email and you are asked to **Review & Sign Document**.

2. Open the document using the link in the email.

3. After reviewing the document, if you decide not to sign, select **More Options**. The **Decline Document** option displays.
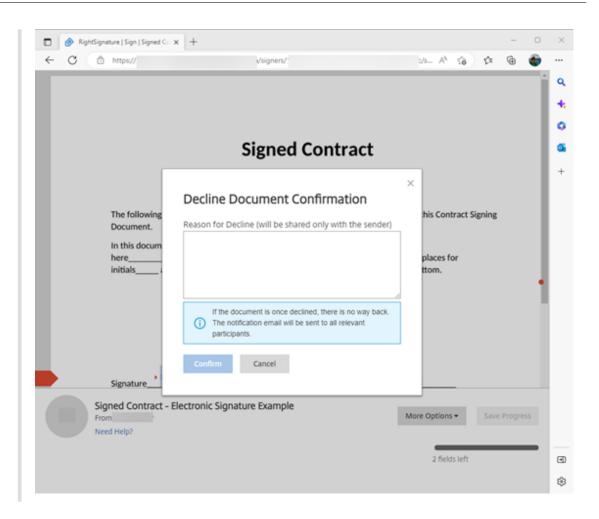
4. Select **Decline Document**.
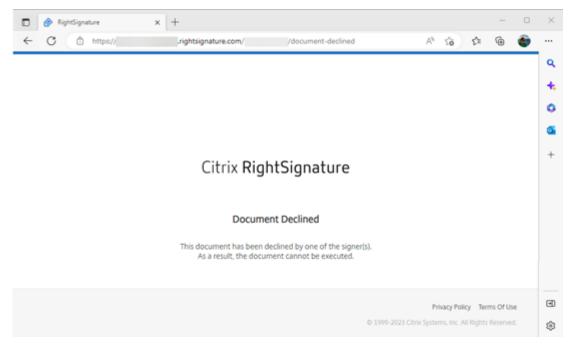
   The **Decline Document** confirmation pop-up displays. Provide a reason for declining to sign.

   > **NOTE:**
   >
   > If the document is declined, there is no way to cancel and an automatic notification email will be sent to all relevant participants.

5. Select **Confirm** to complete the **Decline Document** process.

The **Decline** confirmation email is immediately sent to all relevant participants.

- **Sender received**

- **Signer received**

Default settings

December 8, 2023

Default settings can be edited during the Create a signature request workflow. This allows you to make adjustments to customize the experience for a specific signature request.

To access the **Edit default settings** while creating a request, from the **Review and Send** section of the workflow, select **Edit default settings**.

The **Edit default settings** pop-up displays.

Reminders

When selected, you can provide automatic signature request reminders based on the time settings allowed.

Email document recipients:

- Weekly (on the third, seventh, fourteenth, twenty-first, twenty-eighth day)

- Daily (starting on the seventh day until the thirtieth day) if a document is unsigned.

Attachments
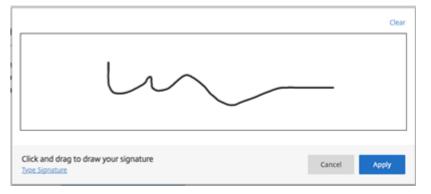
When selected, after the last signature request is completed, ShareFile Signatures sends an email with a PDF attachment of the completed signed document.

Note:

Documents larger than 10 MB are not provided.

Signature types

Select how you want the recipients of the request to sign using the following signature types available:

- **Allow drawn signatures** - Select this signature type to allow the signer to draw their signature using a mouse or a touch device.

- **Allow typed signatures** - Select this signature type to allow the signer to type their signature using a keyboard.

- **Apply blue ink to signatures** - Select the blue ink signature option to distinguish a signed original from a photocopy. All original copies display the signature in blue.

> **Note:**
>
> **Blue Ink Signatures** settings can only be changed by Admins.

Signer permissions

By selecting or de-selecting the checkbox, ShareFile signature users can enable or disable the download option that is available for signers before the document is signed.

Delete a listed request

October 3, 2023

Deleting a request, regardless of the request Status is completed in from the **Signature Request** listing page.

1. Select the signature request from the **Signature Request** listing page.

   The selected listing displays with **Details** and **Activity** tabs.

2. In the **Details** tab, select **Delete**.

The confirmation pop-up displays.

3. Select **Delete**.

The Request deleted message displays briefly confirming the request listing is no longer available.

> **Note:**
>
> The deleted request listing might display until the screen is refreshed.

Signers and viewers receive an email with the completed document and signature certificate for their records once the request is deleted.

Force complete

October 3, 2023

You have the option of forcing a "multiple signer" signature request completion when the Status is **In progress**.

> **Note:**
>
> **Force complete** is available after one of several signers has signed the **Signature Request**.

Use the following instructions to void a request.

1. Select a **In progress** signature request from the **Signature Request** listing page.
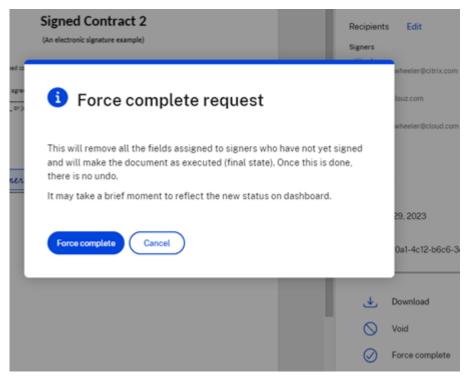
   The selected listing displays with **Details** and **Activity** tabs.

2. Select **Force complete request**.

   The **Force complete** Confirmation pop-up displays.

> **Notes:**
>
> - Using **Force complete** removes all fields assigned to the signers who have not yet signed.
>
> - Remaining signers are automatically reassigned as **Viewers**.
>
> - Using **Force complete** cannot be undone. The request is completed and the document is in the final state.

3. Select **Force complete**.

   The **Signature request voided** message displays briefly confirming the request listing is now in void.

Import fields

February 20, 2024

Use import fields from previous sent documents to save time during document preparation.

Limitations

- Templates are not available to import fields.

- Previous documents with merge fields are not displayed for use.

Instructions

Use the following instructions to import an overlay of fields from a previously created signature request document.

1. Select **Create signature request** then **Send for Signature**

The Signature request flow starts.

2. Select a **Document to send** by dragging a file to the window or select **Browse files**.

3. Enter the recipient information including **Name** and **Email**.

4. Select **Next Step**.

   The **Place fields** screen displays.

5. Select **Import fields** to choose from previous sent documents to save time during document preparation

The **Select a document to import fields** popup displays.

6. Use **Select** next to the previous document you want to import fields from.

The **Import # fields** screen displays.

7. Verify the the fields on the new signature request, then select **Import fields**.

   A "fields imported" confirmation briefly displays.

For more information about sending a signature request, see Create a signature request

Sending a signature request to multiple recipients

October 2, 2023

When requesting a signature, you can request that multiple signers complete the signature request for the same document.

The ability to set the signing order is available. This allows you to stagger the request delivery based on the order you set when you create a signature request.

Add recipients

Use the following instructions to add recipients to a signature request.

1. Under the **Who are the recipients?** section, select **Add recipient** to send the signature request to multiple signers.

2. Enter the recipient information including **Name** and **Email**.

> **Note:**
>
> - **Set signing order** toggle allows you to stagger the requests based on the order set during the request for addition signers. For more information, see Set signing order.

3. Select if the recipient is to be a signer or viewer of the document.

4. Select **Next Step**.

   The **Place fields** screen displays.

5. Select the fields that you want to add to the document. For a multiple signature request, repeat the field selection for each signer using the **Signers** drop-down list.

6. Select **Next Step**.

7. Verify the **Document name** and edit if necessary.

8. Select **Edit** to choose where you want the signed document to be stored or leave the default setting.

9. Add an optional note for the signer.

Note to all signers (optional) ⑦

Add a personalized note to all signers

10. Set the expiration for the request.

Expiration

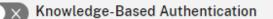The document will no longer be available to sign after the specified number of days:

30 day(s)   Expiration date: 10/28/2023

11. Select the **Passcode** toggle to generate a code the signer must open the signature request.

Security options

✕ Passcode

Recipients must enter a 5-digit passcode to access the documents.

12. Select the **Knowledge-Based Authentication** toggle to require recipients to verify their identity with a knowledge-based quiz. Each signer must independently verify before signing the document.

✕ Knowledge-Based Authentication

Require recipients to verify their identity with a knowledge-based quiz. Each signer will need to independently verify before signing the document.

Note:

Signers will be locked out of the document after 3 failed attempts.

13. Under **Default settings** select the optional **Edit Default settings** or skip to the next step. For more information on the setting options, see Default settings.

14. Select **Save** if you made any changes to the default settings.

15. Select **Send signature request**.

Set signing order

Use the following instructions if you need multiple signers to sign the document in a particular order.

> **Note:**
>
> The first signer listed must complete the request before the second signer receives an email and so on.

1. Once you completed adding the recipients for a signature request under the **Who are the recipients?** section, select the **Set signing order** toggle.

2. Select the drag icon ⠿ to change the order of recipient signature request delivery.

3. Select **Next step** when you completed setting the signing order.

Status

October 2, 2023

The **Signatures requests** provides a listing of the requests and provides a status of the various stages of a request. This allows you to quickly track the progress.

Tracking the status of a signature request includes the following events:

- **In progress** - The signature request is waiting on the completion by one or more recipients.

- **Completed** - The signature request is fulfilled by the recipient or recipients.

- **Expired** - The timeline for the signature request has expired and is no longer available for completion.

- **Declined** - The recipient utilized the **Decline signature** option after receiving the signature request. For more information, see Decline signature.

- **Voided** - The signature request is voided by the sender. For more information, see Voiding a request.

Templates

October 2, 2023

This article explains how to use templates when creating documents to send for signatures.

Create a template

Use the following set of instructions to create templates in RightSignature.

1. In ShareFile, navigate to **Signatures** > **Templates**.

   The ShareFile RightSignature page opens in a new tab.

2. Select **Create Template**.

3. Select **Upload A File** to open the document you want to build a template with.

4. If replacing the underlying source file used to create the template, select the red x. Afterwards, select the new source file of the template.

5. Select **Prepare Document** to continue editing.

6. First, edit the roles on the template - change the role names, edit the order, or add/delete roles.

7. Select **Next: Place Fields** to create the signer and annotation fields for the template.

8. Next use the document overlay options to add, change, and remove various types of fields. When finished with edits to the document, click Next: Review.

9. Select **Create Template**.

Edit a template

Follow these steps to edit an existing template:
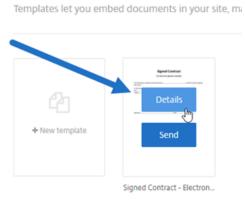
1. In ShareFile, navigate to **Signatures** > **Templates**.

   The **ShareFile RightSignature** page opens in a new tab.

2. From the RightSignature dashboard, select **Templates** in the left menu bar, then select the template that you want to edit from **Reusable Templates**.

3. Select **Details**, and on the **Details** screen select **Edit**.

4. If replacing the underlying source file used to create the template, select the red x. Afterwards, select the new source file of the template.

5. Select **Prepare Document** to continue editing.

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First, edit the roles on the template - change the role names, edit the order, or add/delete roles. When finished with editing the roles, click **Next: Place Fields**.

6. Use the document overlay options to add, change, and remove various types of fields. When finished with edits to the document, click **Next: Review**.

7. Edit the name, message, tags, expiration, and carbon copies for this template.

8. When you are finished editing, select **Create Template**.

Status

October 2, 2023

The **Signatures requests** provides a listing of the requests and provides a status of the various stages of a request. This allows you to quickly track the progress.

Tracking the status of a signature request includes the following events:

- **In progress** - The signature request is waiting on the completion by one or more recipients.

- **Completed** - The signature request is fulfilled by the recipient or recipients.

- **Expired** - The timeline for the signature request has expired and is no longer available for completion.

- **Declined** - The recipient utilized the **Decline signature** option after receiving the signature request. For more information, see Decline signature.

- **Voided** - The signature request is voided by the sender. For more information, see Voiding a request.

Version check for ShareFile apps

September 26, 2023

ShareFile for Mac
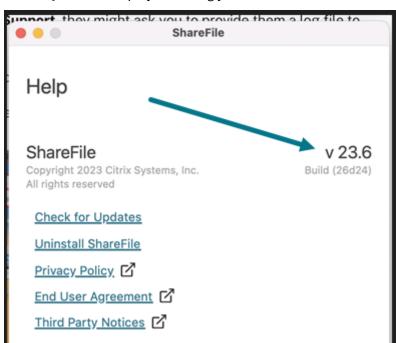
Use the following steps to locate the version of ShareFile for Mac you're currently using.

1. Navigate to your System Tray.

2. Left click the ShareFile icon to open the ShareFile for Mac dashboard view.

3. Click the ●●● then select **Help**.

The **Help** section displays allowing you to view the version number in the top right.

ShareFile for Outlook

Use the following steps to locate the version of ShareFile for Outlook you're currently using.

1. Navigate to your Home tab in Microsoft Outlook and select the blue **ShareFile Options** icon.

2. When the Citrix Files for Outlook window opens, select **Help**.

ShareFile

The **Help** section displays allowing you to view the version number at the top.

ShareFile for Windows

Use the following steps to locate the version of ShareFile for Windows you're currently using.

1. Navigate to the Windows system tray.

2. Right click on the ShareFile logo, then select **Help**.

The **Help** section displays allowing you to view the version number in the top right.

ShareFile Virtual Data Room

November 20, 2023

ShareFile provides a simple virtual data room designed for your most complex deals.

> **Did you know…**
>
> - ShareFile Virtual Data Room allows customers to easily configure HIPAA compliance and protect sensitive documents that are stored or distributed during confidential transactions.
>
> - When signing up for a VDR account, customers can now select the EU control plane. This enables VDR to be utilized internationally while being EU compliant and following stringent

> guidelines like GDPR.
>
> - ShareFile VDR users can secure client data by getting notified of unusual access to ShareFile account via email with **Threat detection alerts**.
>
> - ShareFile Virtual Data Room supports FINRA archiving as per the SEC rule 17a-4 guidance. To learn more, see ShareFile Archiving.

ShareFile **Virtual Data Room** (VDR) allows you to easily control, share, and track your secure documents —it's your complete due diligence solution.

ShareFile's web-based virtual data room allows parties around the world to access documents easily and securely with complete audit trails.

> **Note:**
>
> Existing ShareFile accounts cannot be converted to the Virtual Data Room account type.

To learn more about ShareFile virtual data room functions and features, see ShareFile Virtual Data Room user guidance.

Limitations

- Password protected files and corrupted files do not render correctly.

- **Virtual Data Room** features are not enabled for non-VDR accounts.

- Some **Virtual Data Room** enhancements are only available for US customers at this time.

Fixed issues

Currently, there are no fixed issues to report.

KNown issues

Currently, there are no known issues to report.

Advanced Analytics

September 21, 2023

This report allows you to view statistics on any root-folder in your account. Statistics include a graph of downloads/views per day, most viewed documents (including the number of views), most active users, and recent searches. To access this report, navigate to a root-folder and select VDR Analytics under the **More Options** drop-down menu beside the folder name.

Selecting this link displays a snapshot of activity. Using the drop-down menu at the top, select to view analytics for the last:

- 7 days
- 14 days
- this month
- 30 days
- a specific month dating back to when you first opened your account

Other items include a graph of downloads/views per day, most viewed documents (including the number of views), most active users, and recent searches.

Selecting a specific users name opens the click trails reporting. This report tracks every link the user clicked while in the ShareFile account. The report includes the time and date to show how long a particular folder or files are viewed.

Click Trails

September 21, 2023

Using **Click Trails** allows an account administrator to see all of the steps that an individual has taken within the Virtual Data Room from the time that they login until the time they logout. In order to use **Click Trails**, you must:

- Have the **VDR Analytics Page** permission.

The Virtual Data Room Click Trails feature can be found at:

- **Admin Settings** > **Advanced Preferences** > **Company Account Info** > **Click Trails**

Select this to open the page that list your users, location, and the session start time. There is a link to **View Session** on the right. Use the **View Trails for** dropdown to set the view for a specific period of time.

When you select **View Session** for a specific user, you can review a list of that individual's ShareFile session from the time that they logged in until the time that they logged out.

Selecting the individual's name from the original list, you can review all of their sessions during a specific period of time.

Data Room Index

September 21, 2023

You can generate a Data Room Index on a root-folder level. This report generates a list of all files and folders within this root level folder and include an index. The index feature assigns a number to all files and folders at the root level. Administrators can organize and track files and subfolders.
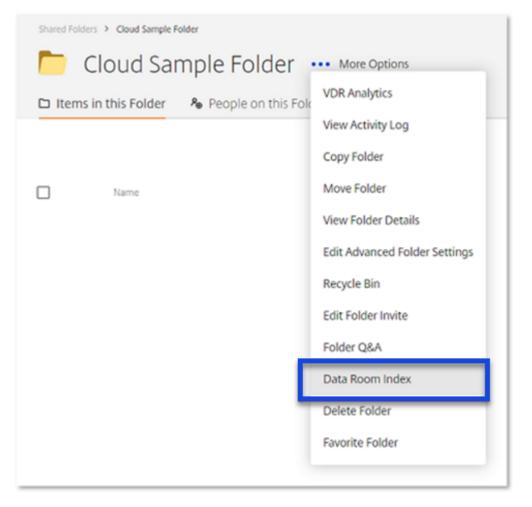
In order to create a **Data Room Index**, you must:

- Have the "Access folder analytics"permission
- Admin permission on the root-level folder

To generate a Data Room Index:

1. Access the root-level folder (either a root-level Shared Folder or your My Files and Folders location)

2. Access the More Options drop-down menu beside the folder name link

3. Click Data Room Index

   A popup window will appear with a PDF listing of all files and subfolders within the folder.

All files and subfolders will be assigned a number. For example, Subfolder 1 will be assigned a number of 1 and all files within this subfolder will be assigned numbers in this order: 1.1, 1.2 and so on. Files within the folder will then be assigned [2], 3 and so on. This Data Room Index can be saved and printed so that the administrator can keep track of all the information within each root-level folder.

> **Note:**
>
> A data room index report cannot be generated for folder structures that exceed 10,000 items.

View only access

September 21, 2023

The following file formats are compatible with the ShareFile document viewer: PDF, Word, Excel, and PowerPoint. When these files formats are uploaded to your account they can be viewed in the content viewer. The viewer allows users to scroll through the pages and view the document without downloading it to their computer.

Users with View only permissions can sign in to access a folder and view the files. The watermarking feature is enabled on the account by default and displays the email address of the user viewing the document.

Render times might vary depending on the document complexity and size.

The following size restrictions apply for rendering:

- PDF - 50 Mb
- Word - 20 Mb
- Excel - 20 Mb
- PowerPoint - 52 Mb

Recipients cannot view PDF and Word files uploaded to **File Box**.

Watermarking

September 21, 2023

Watermarking allows you to track documents by user. This includes printing. If the user has download permissions, the watermark will not appear while viewing.

Setting the Watermark

To set an account-wide default: **Access Settings** > **Admin Settings** > **Advanced Preferences** > **File Settings**. You find the **Document Watermark** setting under the **Watermark** settings on this page.

> **Note:**
>
> Once enabled the watermark will immediately display.

Folder-specific settings:

1. Select the folder and access the more **Options** drop-down menu beside the folder name.

2. Select **Edit Advanced Folder Settings**.

   There are three options under the Watermark section:

   - Use account wide setting
   - Do not use a watermark for this folder
   - Use another watermark (allows for custom text)

Watermark Options

- User's Email
- User's First Name
- User's Last Name
- User's Company
- User's IP address
- Current Date
- Current Time

Select the **New Line** option from the list provided to create a line of text to be displayed on the watermark.

Watermarked Downloads

Use **Watermarked Downloads** for the entire account or within a folder in the **Virtual Data Room**. **Watermarked Downloads** allow users with view-only access to download a PDF version of the file with a custom watermark included.

To enable Watermarked Downloads for View-Only, navigate to **Admin Settings** > **Advanced Preferences** > **File Settings**. Change the default setting from **No** to **Yes** and select **Save**.

To enable this feature on the folder level:

1. Select the folder and access the **More Options** drop-down menu beside the folder name.

2. Select **Advanced Folder Options**.

3. Set the desired option for Watermarked Download for View-only.

4. Select **Account-Wide Setting**.

5. Select from **Enable View only**, **Watermarked Downloads**, or **Disable View only Watermarked Downloads**.

6. Select **Save**.

More than one file can be downloaded with watermark at a time including whole folders.

RightSignature

December 8, 2023

ShareFile delivers electronic signature ability using RightSignature. An electronic signature, sometimes known as an e-signature, is the same as your handwritten signature on a paper document, except electronic —a mark on an electronic contract or document you make to demonstrate your intent to agree to the terms of that document.

Integrating ShareFile RightSignature with ShareFile gives you the power to obtain legally binding signatures on documents entirely online, being completed more quickly and securely than executing paper documents. ShareFile delivers electronic signature capability at different levels:

- ShareFile electronic signature lets you send files stored in your ShareFile account for electronic signature. For integration steps, see Getting started.

- RightSignature is also available as a stand-alone solution. To get started, see RightSignature.

> **TIP:**
>
> Visit the RightSignature user guidance for electronic signature user information.

Fixed issues

December 11, 2023

Attempting to upload a file using periods in the filename might fail to upload. [ESPILET-351]

February 6, 2023

This release addresses a number of issues that help to improve overall performance and stability.

June 26, 2022

This release addresses a number of issues that help to improve overall performance and stability.

January 20, 2021

This release addresses a number of issues that help to improve overall performance and stability.

RightSignature FAQs

For more information about RightSignature, see RightSignature FAQs.

Storage zones controller

February 25, 2020

Storage zones controller 5.x

Storage zones controller 4.x

User Management Tool

February 25, 2020

User Management Tool

User Management Tool for Policy-Based Administration