citrix™

ShareFile

Contents

About ShareFile

July 19, 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. ShareFile gives users various access options, including Citrix Files mobile clients, such as Citrix Files for Android Phone and Citrix Files for iOS. Citrix Files for Windows and Citrix Files for Mac are the client software used to securely interact with files in the ShareFile platform. Citrix Files for Outlook and Gmail lets you send links directly to your files from your email account.

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

  Notes:

  - Due to a known Microsoft issue, CIFS connectors cannot be accessed from the Microsoft Edge browser when utilizing NetScaler for authentication.

  - ShareFile password reset uses the reCAPTCHA tool for verification. reCAPTCHA is not supported by Microsoft Edge. See ShareFile No Password Reset in Microsoft Edge for more information.

- **Mozilla Firefox** - Latest version

- **Google Chrome** - Latest version

- **Apple Safari** - Version 10 through 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.

Advanced Connections

July 19, 2023

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**.
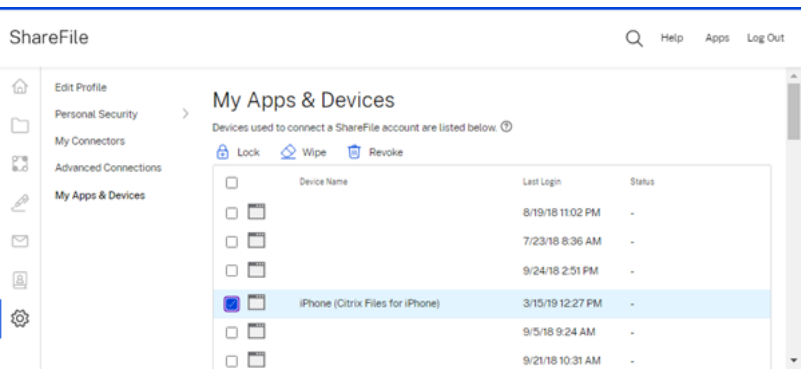
Enabling external tools

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

My Apps & Devices

July 19, 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.
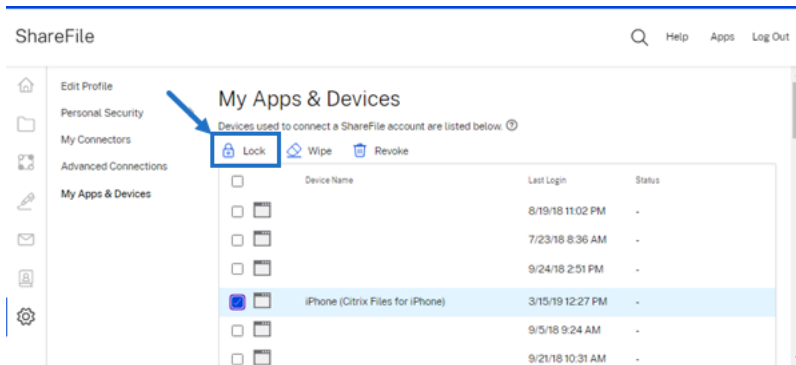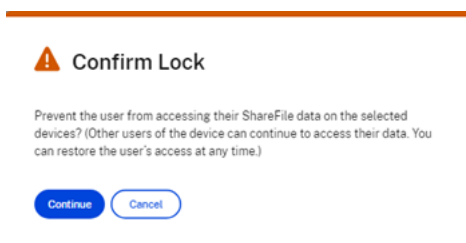
- Revoke a user's device.

Using Lock

Lock a user's account from a device to prevent the user from accessing the ShareFile data on it.

ShareFile

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.
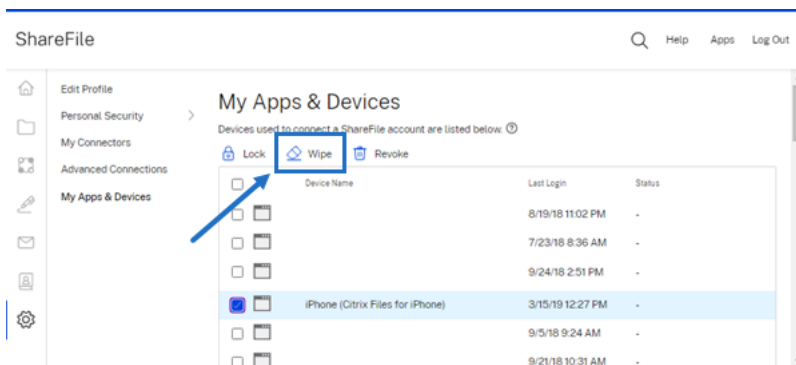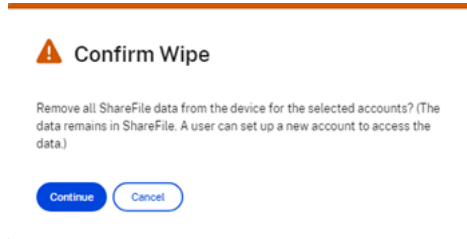

Using Wipe

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**.

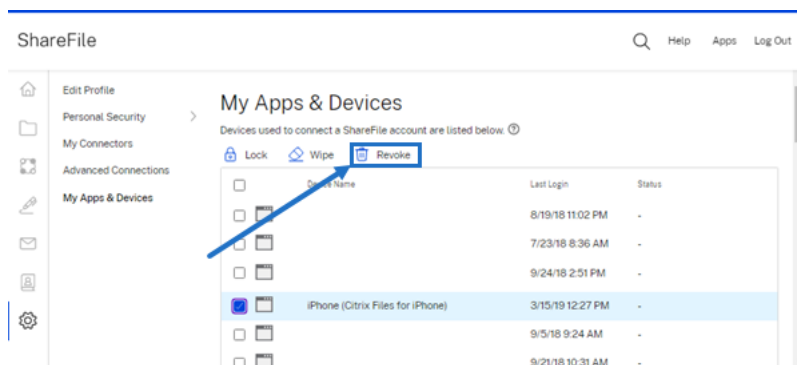3. Select **Continue** to confirm the wiping of the device.
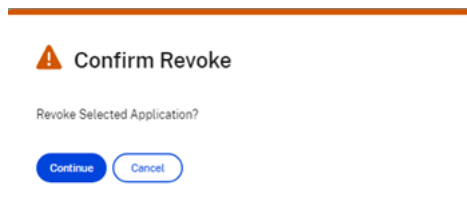

Using Revoke

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.

Co-editing in ShareFile

July 19, 2023

This article explains the steps necessary to share editable links from your ShareFile account. This allows your recipients to make edits to your Microsoft Office files.

ShareFile user requirements for co-editing

This feature is available to both employee and client users so long as the following requirements are met:
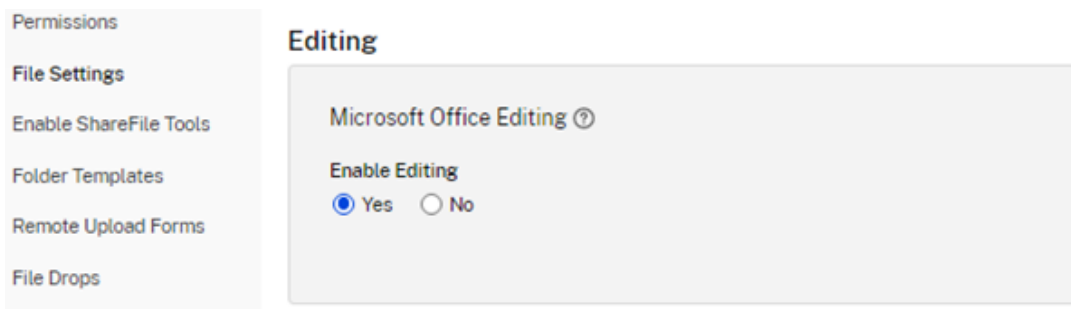
- **Previewing files** - Download permission must be enbaled on the folder where the file is stored.

- **Editing Files** - The following requirements are necessary to be able 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.

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.
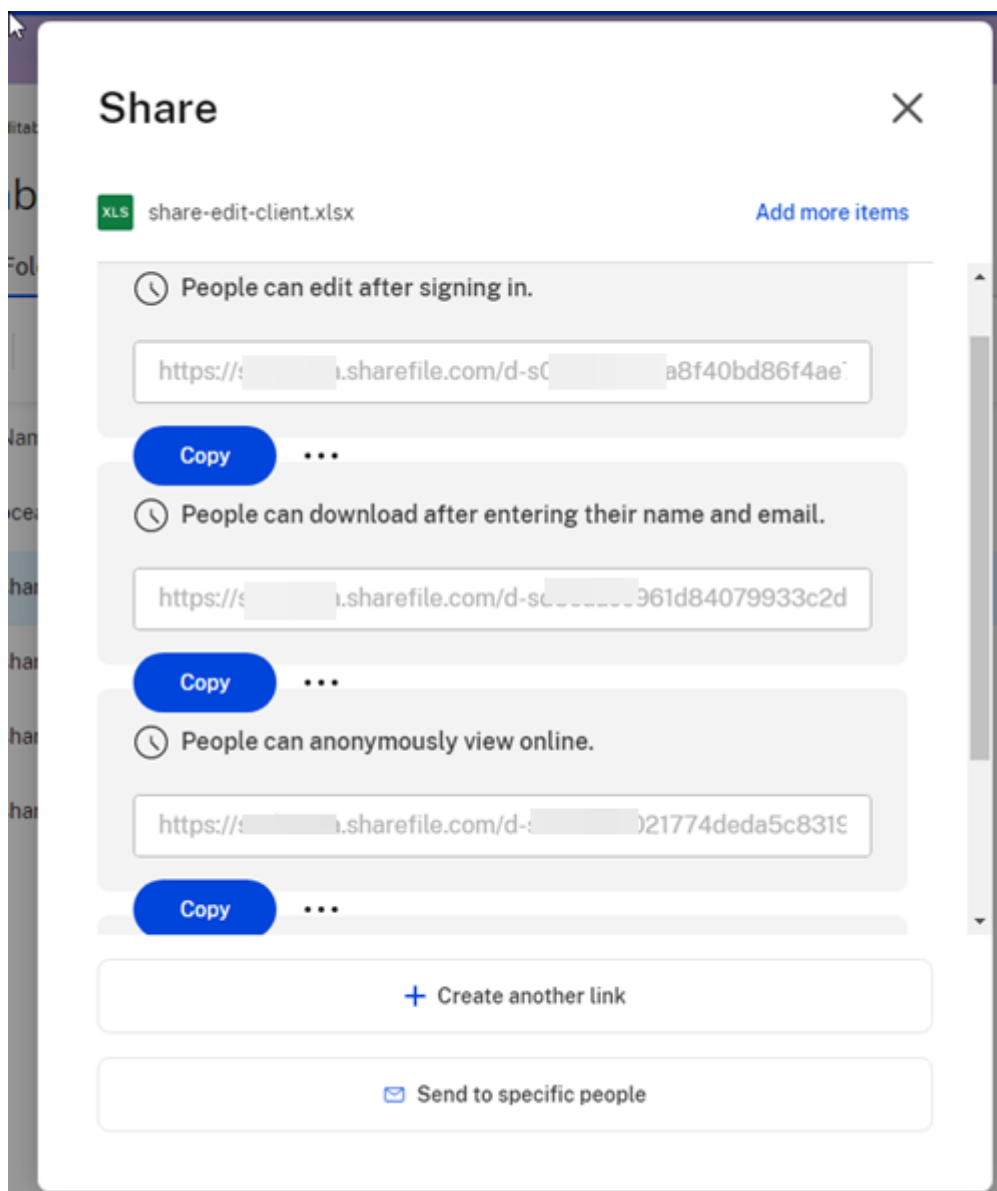>
>
>
> - Compatible file types are: **.docx** for Word, **.pptx** for PowerPoint, and **.xlsx** for Excel.

1. Select a file to share in your ShareFile account.
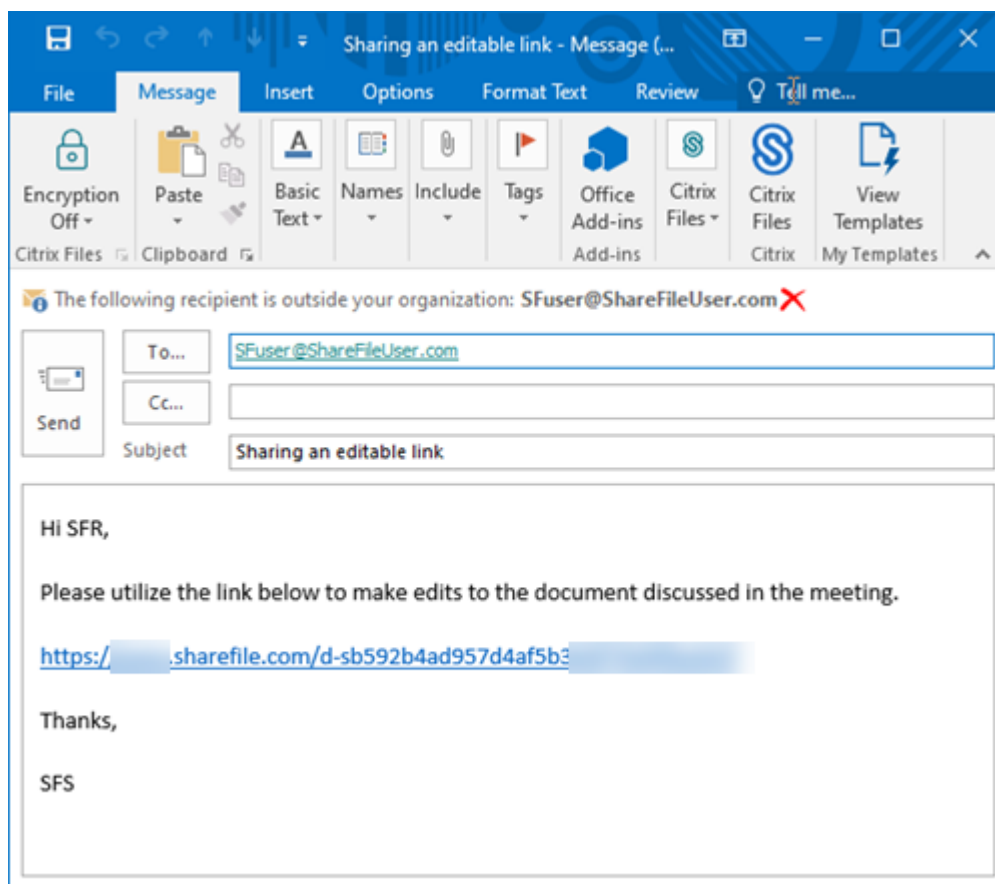
2. Select **Share**.

6
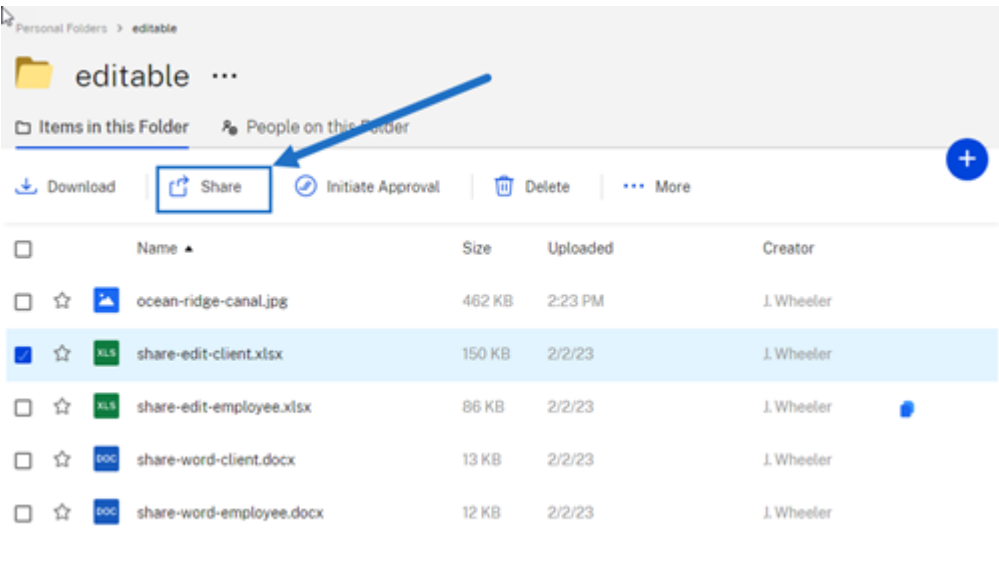
3. Select **Copy** under the **People can edit after signing in** option.

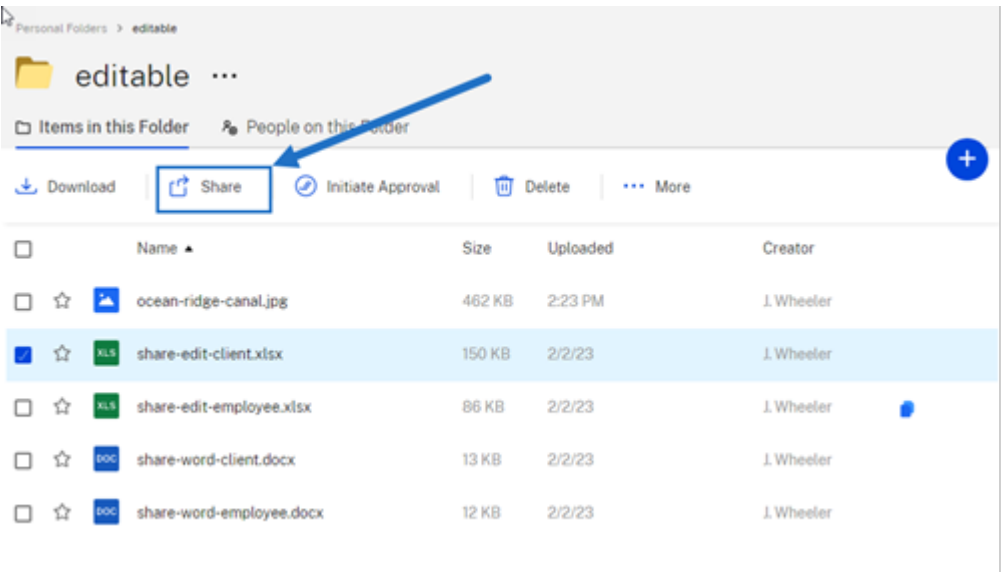The **Link copied to your clipboard** message displays briefly.

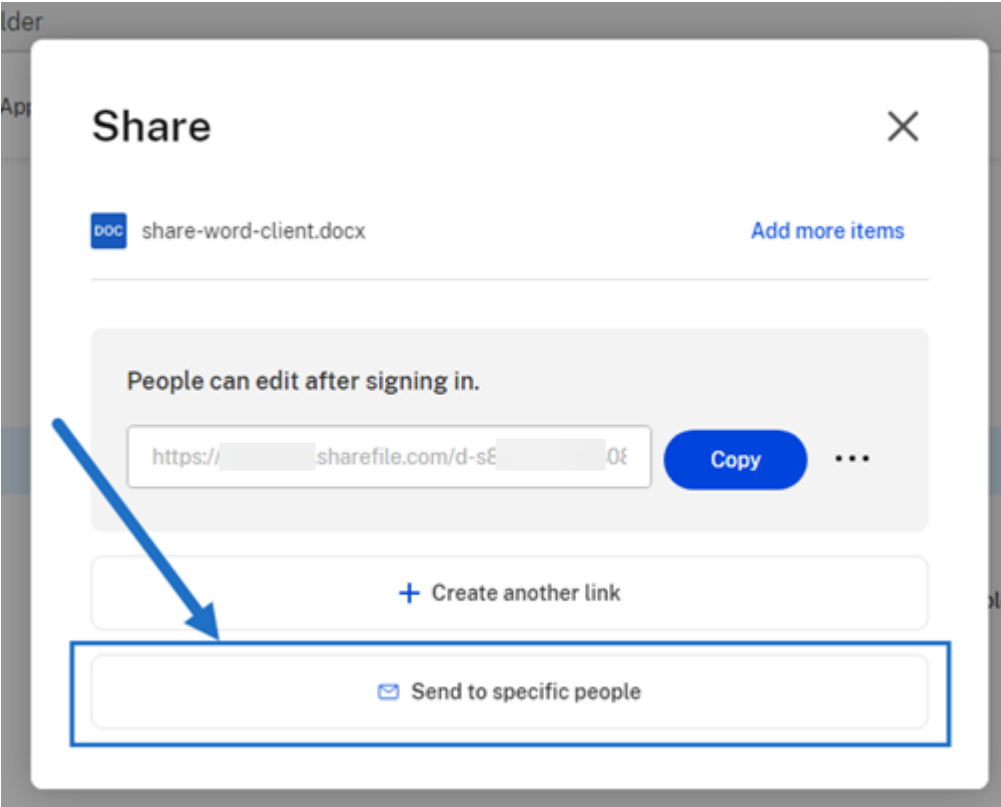4. Use the copied link to share with email or another communication app.

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.

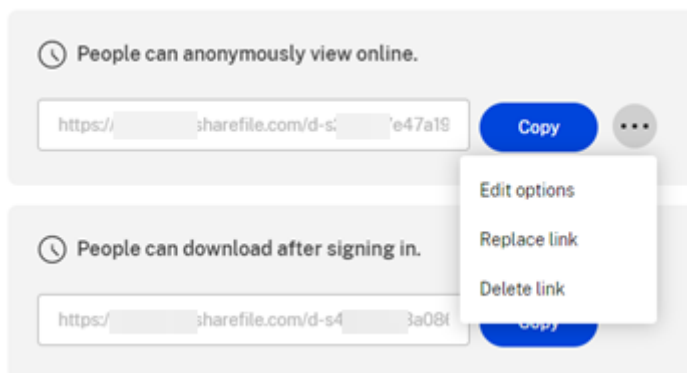 - Checkbox for **Always link to the latest version of the file**.

- **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.
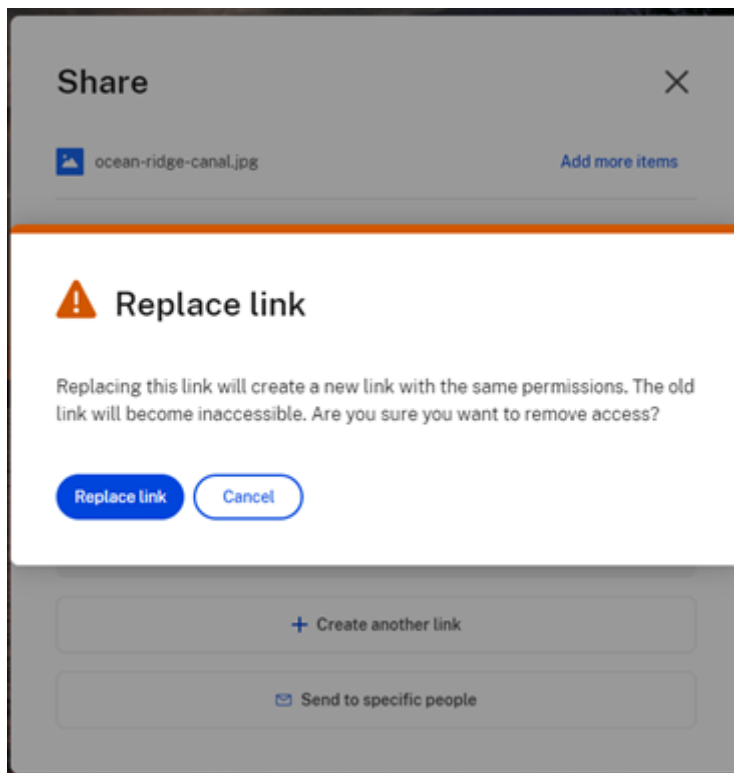
- **Who can access this link**:

    - **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.
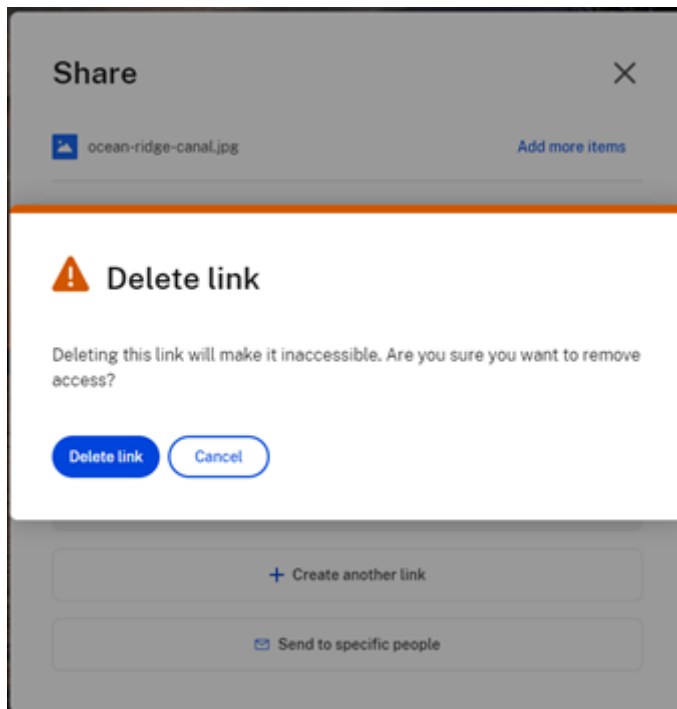
Notifications This check box default is set for the sender of the file to receive notifications when the file is accessed. If you prefer not to receive this notification, uncheck the box.

Replace link

Replace link allows you to create a new link with the same permissions. The old link will become inaccessible.
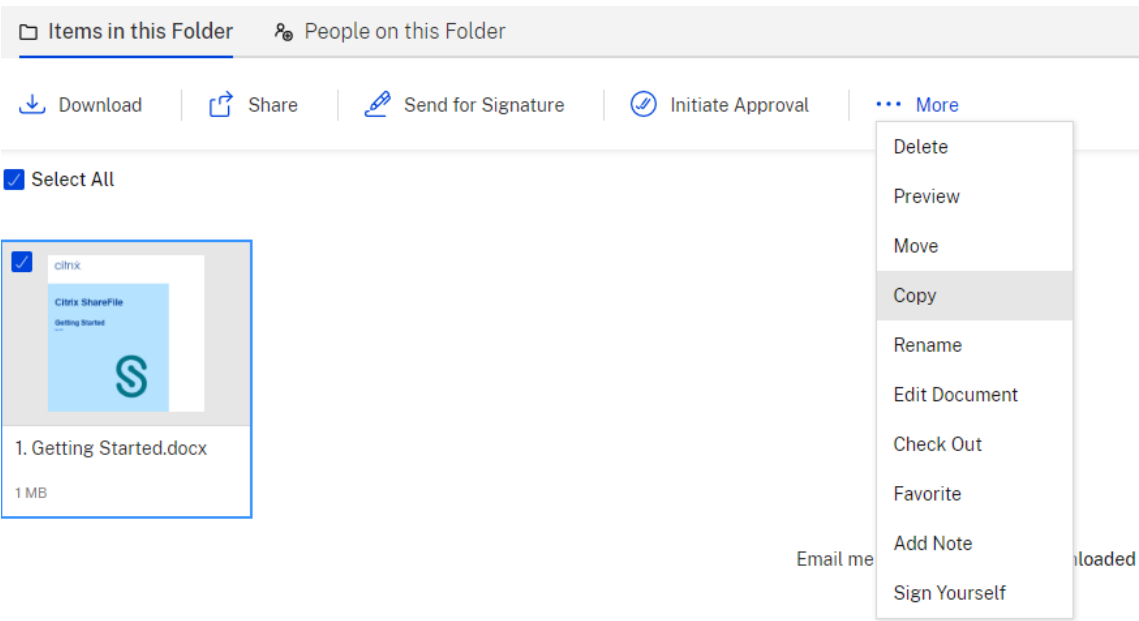
Delete link

Delete link allows you to make the link inaccessible. A new link is created by starting the share process again.
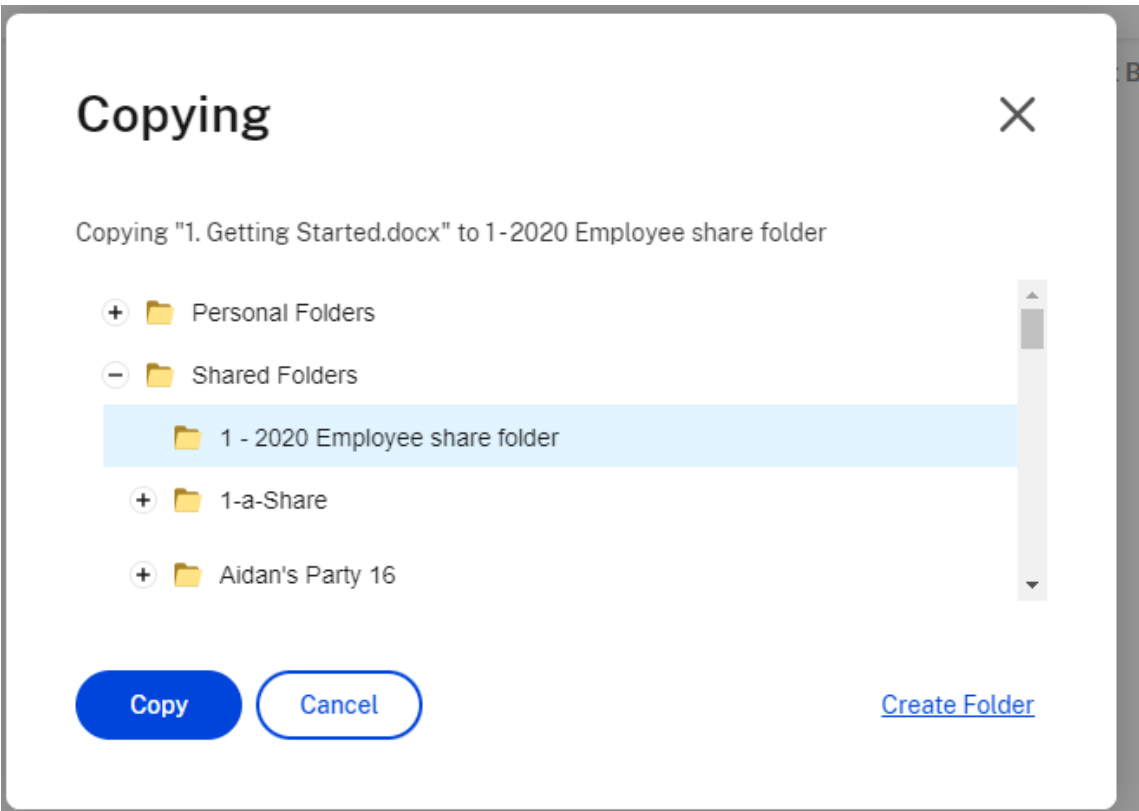
Copy files

July 19, 2023

The following steps explain how to copy files in ShareFile.

1. Select the file you want to copy.

ShareFile

2. Select **Copy**.

3. Select the location you want to copy to.

4. Select **Copy**.

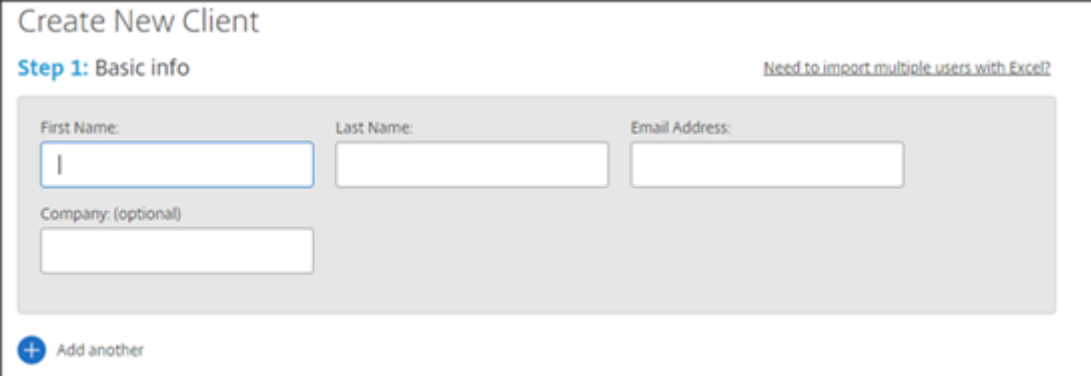The file is copied to the location you selected.

Create a client

July 19, 2023

Create an external client with limited access to shared folders.

Requirements to create an external (client) user

- An Employee user.
- 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 **People > Manage Users Home** or **Browse Clients** in ShareFile. Use the **Create Client** button to begin creating a user.

Enter your user's email address, first name, last name, and company. If you want to add more users, click **Add another**. By default, new external (client) users are prompted to create a password when they sign in to Citrix Workspace for the first time.

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.

Notify Users

Send a customized message to let the new users know they've been added to the account.

KC

Message:

I've added you to my [   ] account.

Character limit: 954

Preview Email

Notify   Skip

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

Create an employee

July 19, 2023

An employee user is most often 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.
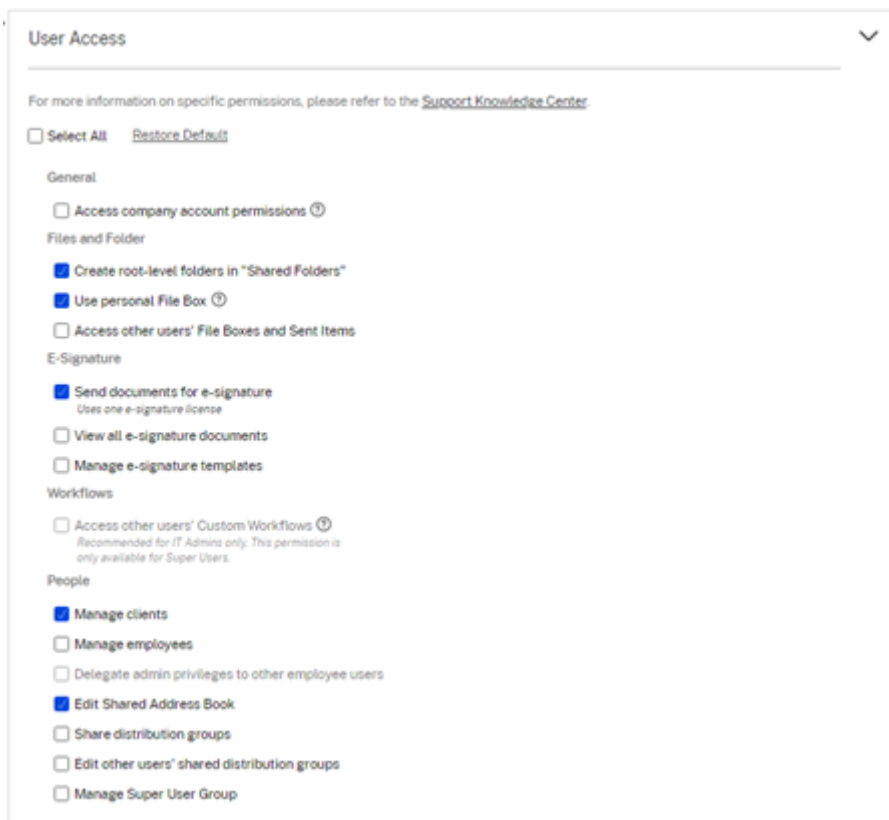
Requirements to create an employee user

- 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 the ShareFile dashboard. Use the **Create Employee** button to begin creating a user.

Type your user's name, email address, and company info. You can also customize their password. 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.

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. This option is designed to prevent accounts from circumventing employee licensing requirements.

When a user attempts to create a client user with an employee company email, the user is prompted to send a request to an admin on the account to create the user as an employee.

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.

Create a folder

July 19, 2023

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**.
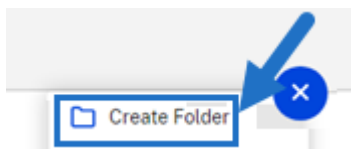
3. Type in the folder **Name** and **Details**.

> NOTES:
>
> - Citrix Files 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.

Delete files

July 19, 2023

The following steps explain how to delete files in ShareFile.

1. Select the file you want to delete.
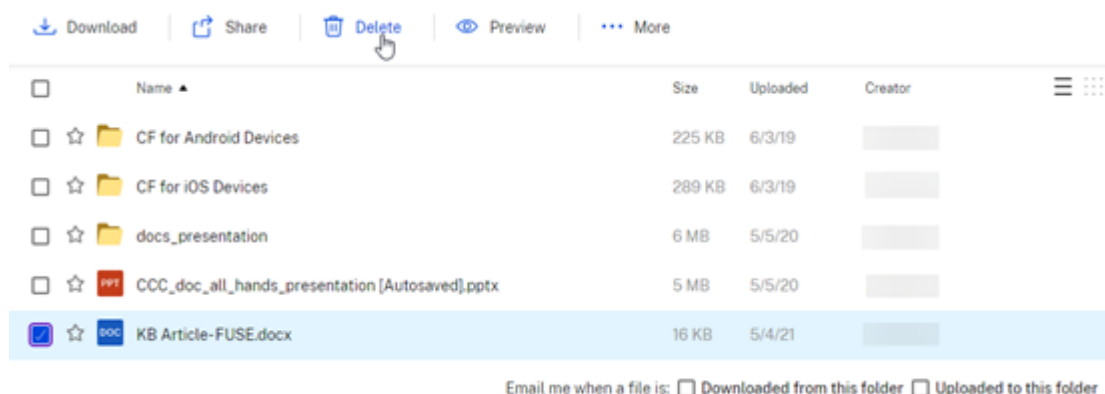
2. Select **Delete**.

3. Select **Continue** to confirm you want to delete the file.
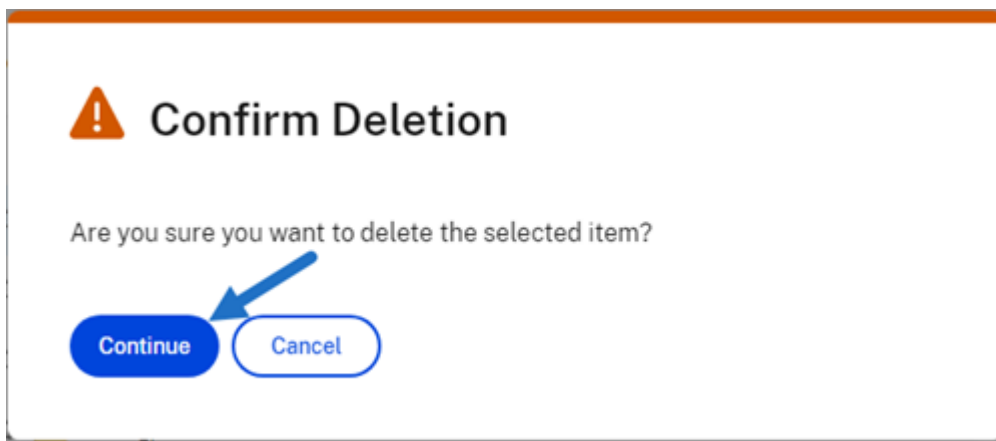
The file is deleted.

Download and view files

July 19, 2023

The following steps explain how to download and view files using ShareFile once you have created a folder.

1. In the ShareFile webapp, select the file to download.

2. Select **Download**.

3. Navigate to your download folder to view and access the file.

Edit files

July 19, 2023

The following steps explain how to open and edit a file using ShareFile.

> Tip:
>
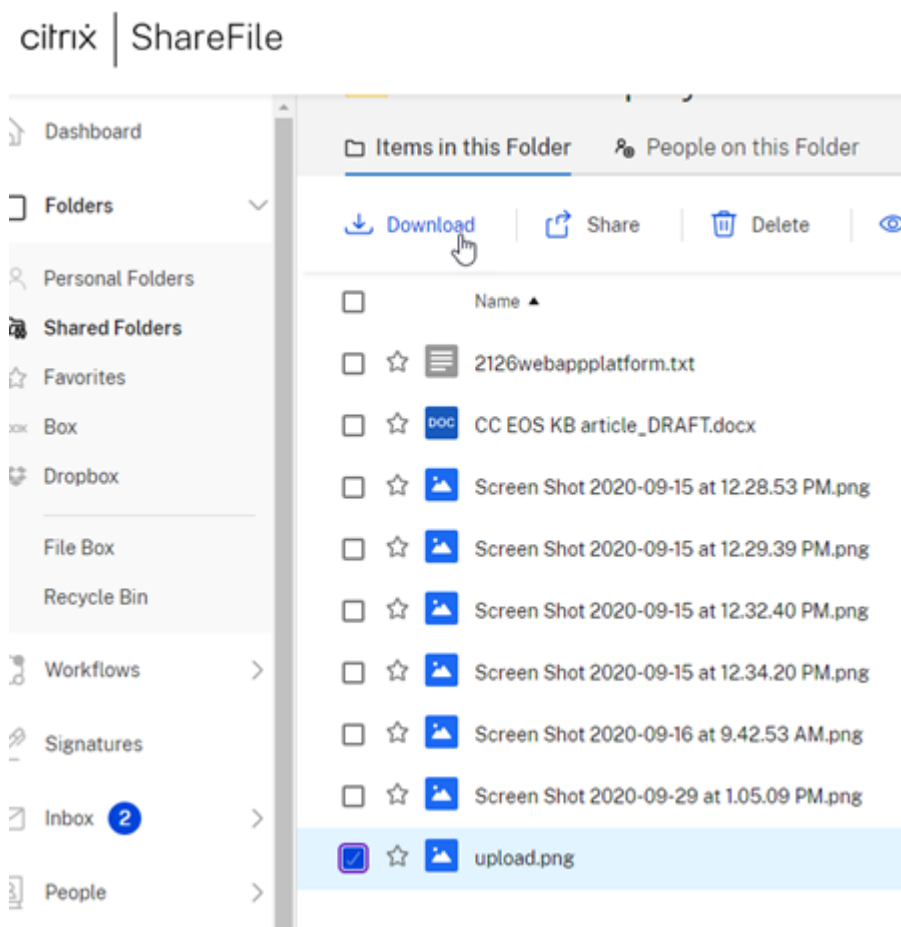> Use editable sharing with Microsoft 365. For more information, see Co-editing in ShareFile.

1. Navigate to the file you want to edit from your ShareFile folder.

2. Select **Download**. The file downloads 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.
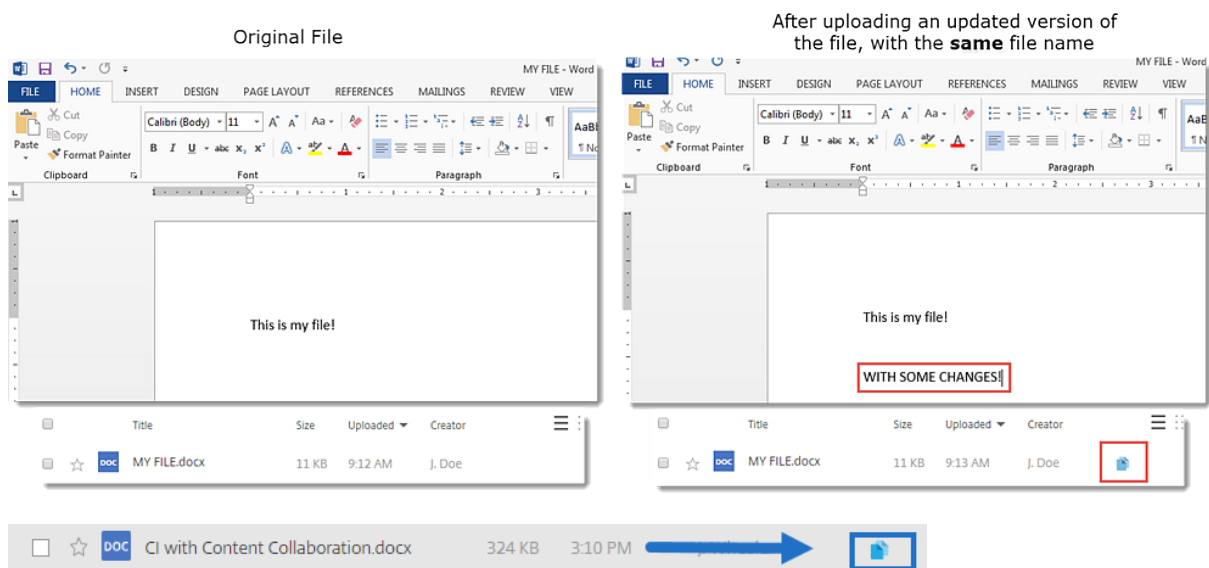
File versioning

July 19, 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.

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.
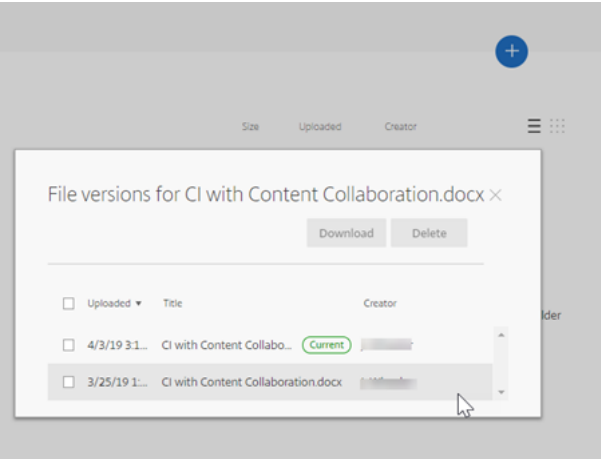
Number of Versions

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**.
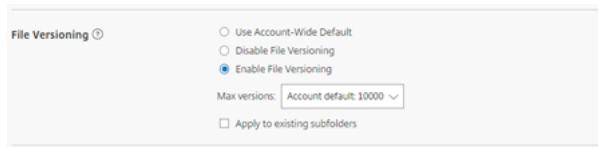
Individual Folder

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.

Provide user access to folders

July 19, 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 on this Folder** 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.
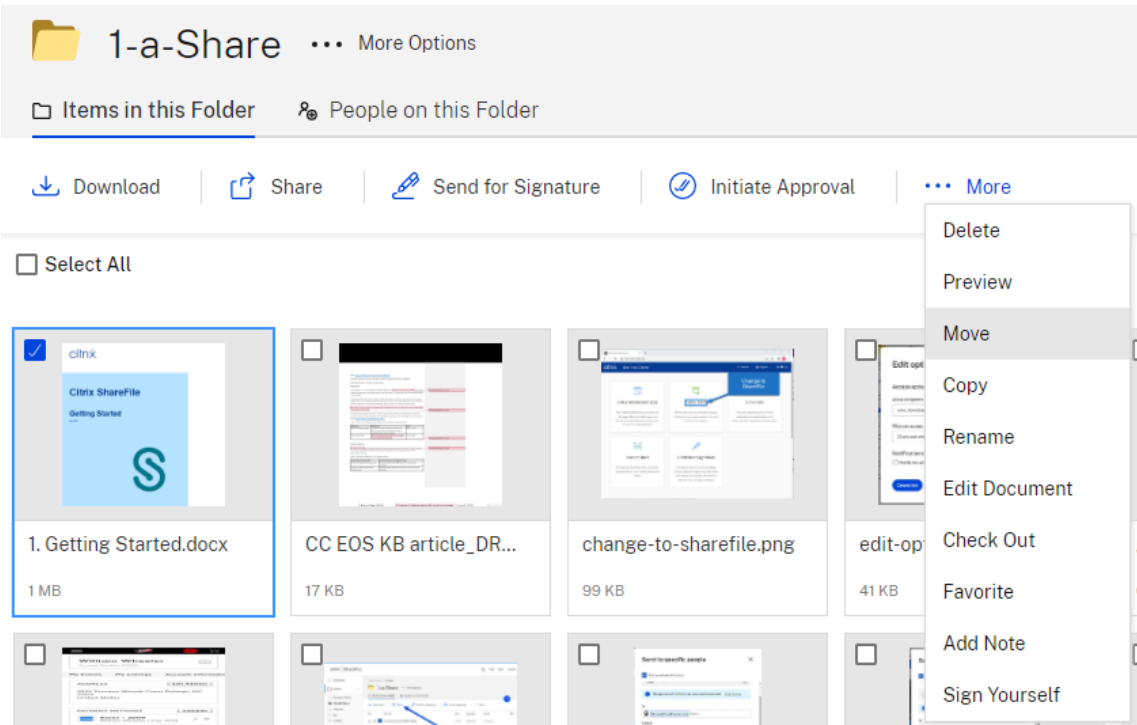6. Check the **Notify Added Users** option in the bottom right.

7. Save the changes. Your user then receives an email notification that they have been added to the folder and must activate their account.
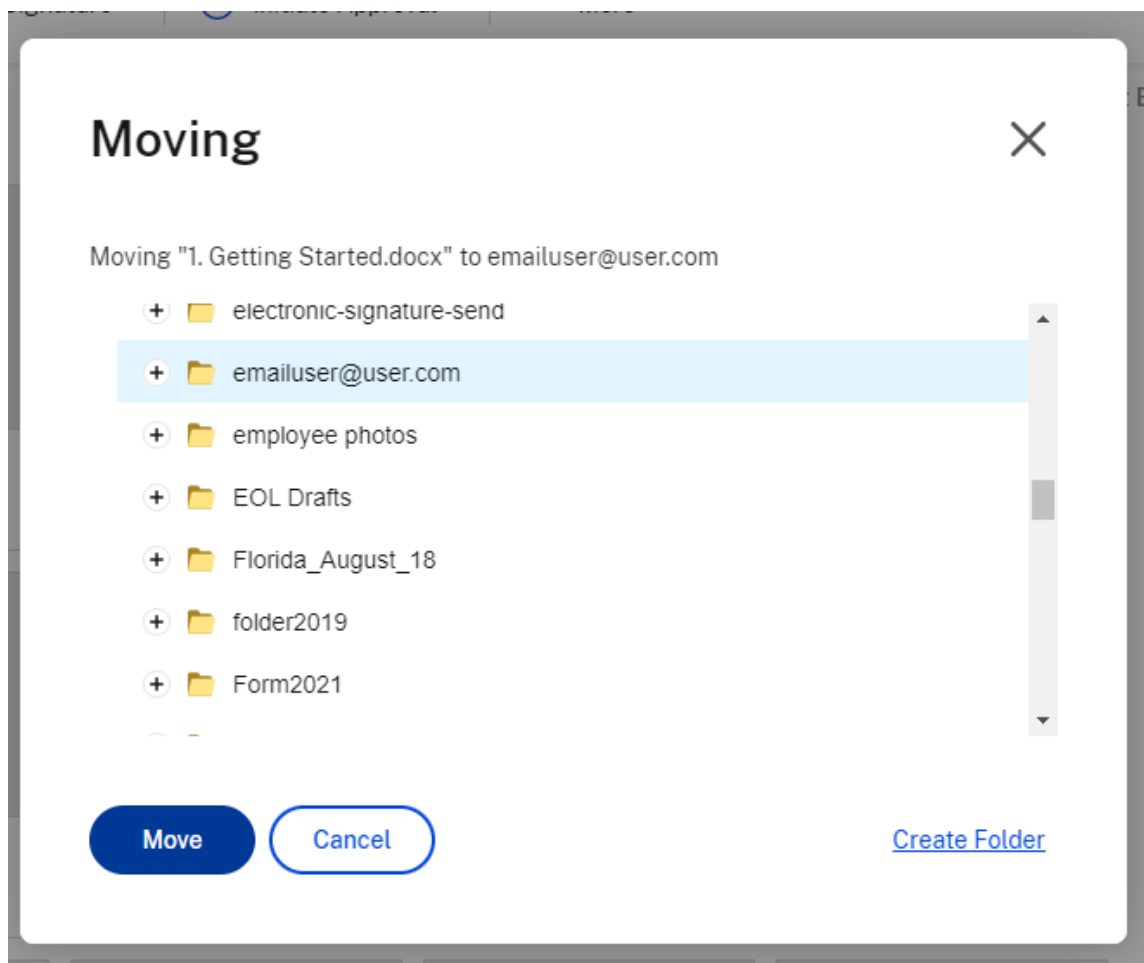
Move files

July 19, 2023

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.

Personal Settings

July 19, 2023

Employee users can edit their personal settings when they sign into their account. The following in-formation provides the details for each section in **Personal Settings**.

Edit Profile

The following items can be changed under **Edit Profile**:

- Name and Company Details

- Profile Picture

- Change Password

- Edit Email Addresses including **Add Alternate Email**

- Time and Date

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.
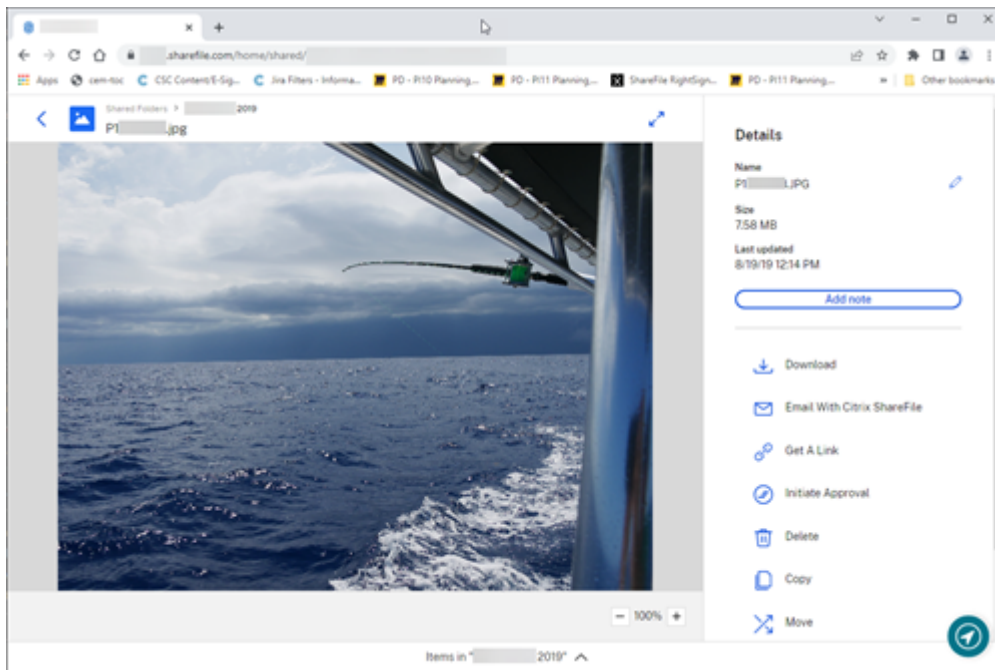
Preview files

July 19, 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**.

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
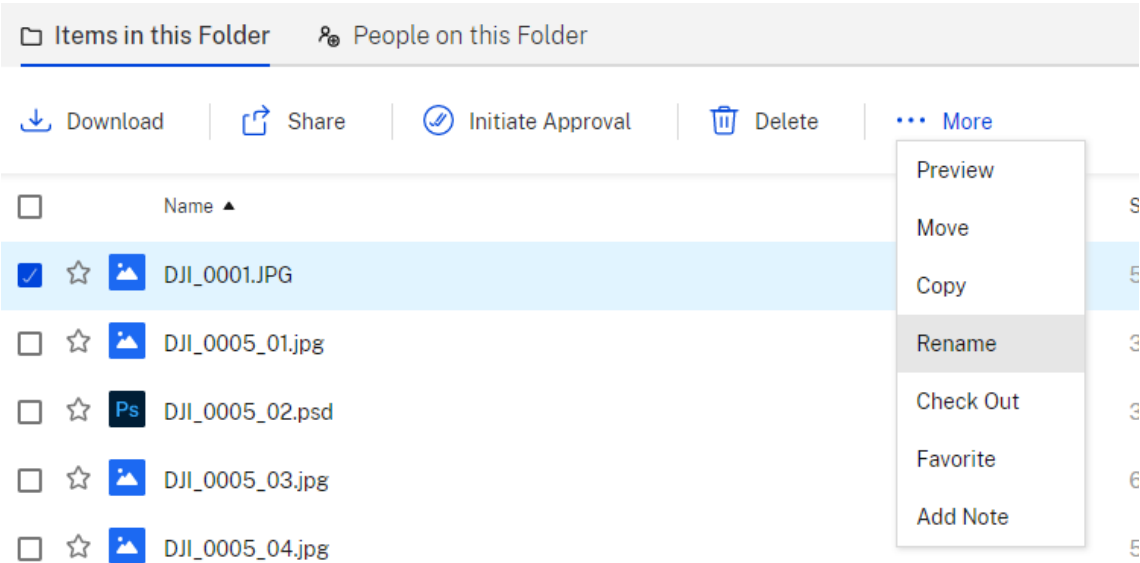- NEF (White Balance of original image may not be preserved)

For information on Microsoft 365 file types, see ShareFile editable sharing with Microsoft 365.

Rename files

July 19, 2023

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.

Create a report

July 19, 2023

The following information provides the steps necessary to utilize ShareFile reports.

Create report

Complete the following steps to create a ShareFile report:

1. Open your ShareFile account.

2. From the ShareFile dashboard, navigate to **Settings** > **Admin** > **Company Account Info** > **Reporting**.

3. Select **Create Report**.

4. Select the type of Report you want to run, then click **Next**.
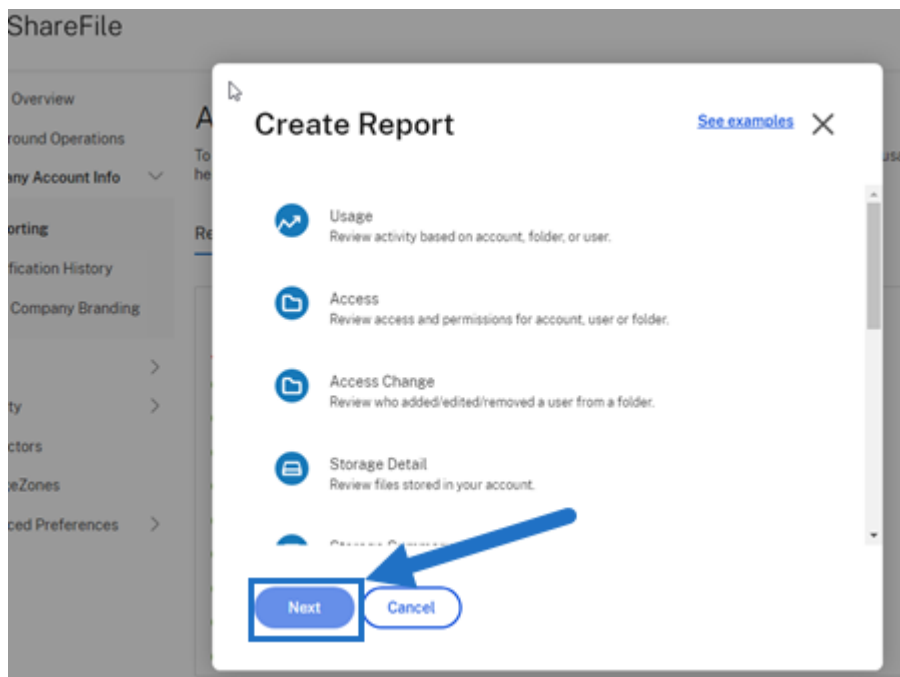
5. Fill in the details as required and click **Create**. Reports can be generated as Excel or CSV files.

Create Report: Access Change ✕

Name: Access Change Report

Range: Custom ∨ 📅 07/18/ ∨ to 📅 07/19/ ∨

Based on:
- ⦿ Entire Account
- ○ User
- ○ Folder

Recurring:
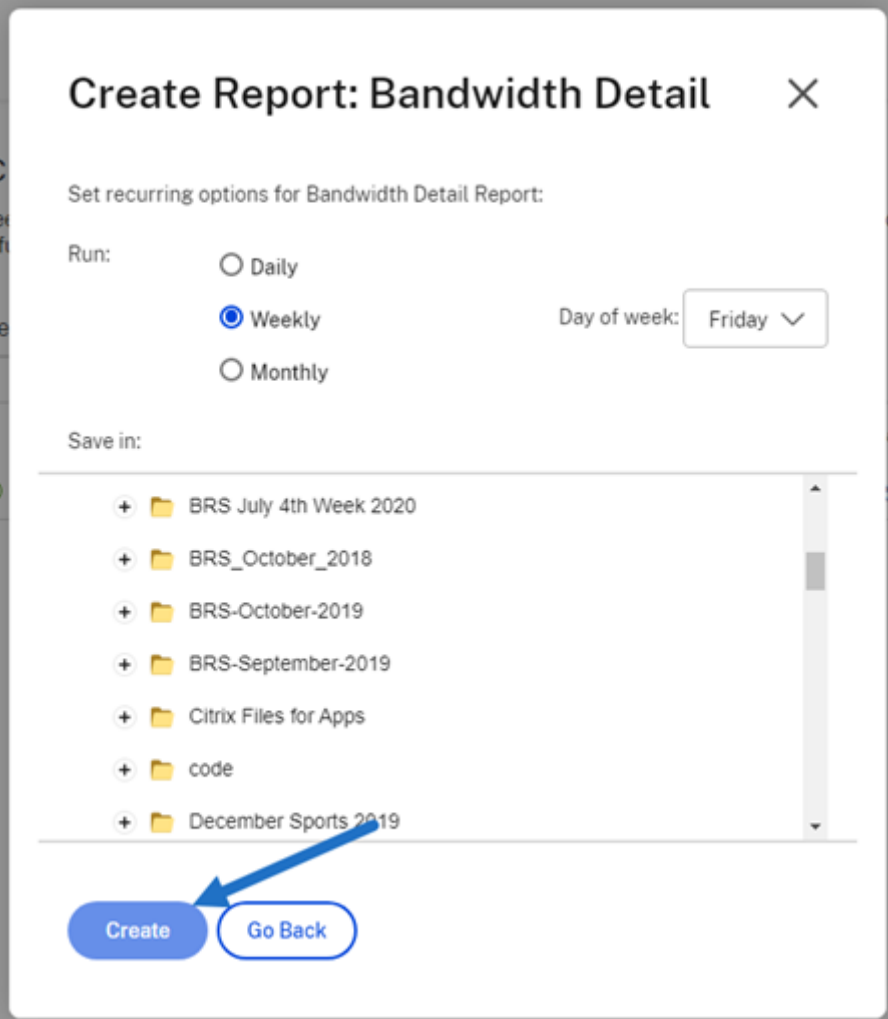- ⦿ No
- ○ Yes

Generate:
- ⦿ Excel
- ○ CSV

Create **Go Back**

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 re-curring 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.
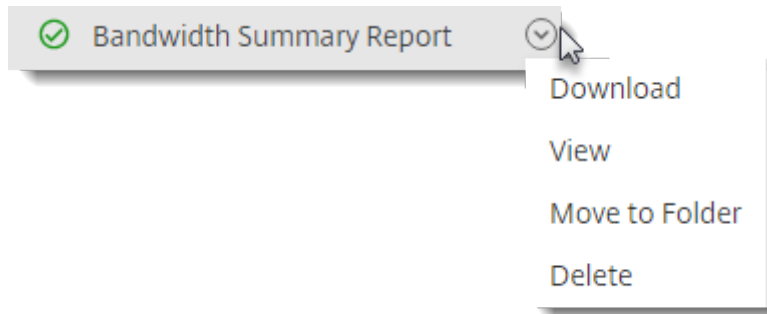
Report Pending

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.
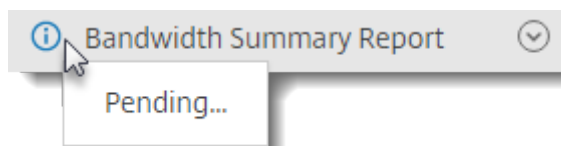
View Completed Report

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 support a maximum period of 90 days. Citrix recommends a maximum of 30 days.

Report types

Usage

Reviews activity based on account, folder, or user and includes items such as: login, failed login, down-loads/views, uploads, create folder, check in / checkout, move, restore, create notes, edit, create URLs, delete, DLP scan (OK), DLP scan (rejected), and DLP share. If the activity name is not checked when creating the report, no data is returned for that activity name.

Access

Reviews access and permissions on folders. This report can be run at the account level, for a specific user, or on a specific folder.

Access change

Reviews when users were added, edited, or removed from folders. This report can be run at the ac-count level, for a specific user, or on a specific folder. This report can only be run with a date range no longer than 90 days.

Storage detail

Reviews files stored in your account.

Storage Summary

Reviews data for the account or an individual user. Due to the scope of this report, it can only be run once a week, on a recurring basis. The named user in this report represents the owner of the folder in which the item resides.

Share

Reviews activity related to files that are shared by users on the account. This includes any Share messages created in other Citrix Files apps. This report can be run at the account level or for a specific user. This report can only be run with a date range no longer than 90 days.

Request

Reviews activity related to file requests that have been sent by users on the account. This includes any Request messages created in other Citrix Files apps. This report can be run at the account level or for a specific user. This report can only be run with a date range no longer than 90 days.

Users

Reviews a list of users on your account and their status as it relates to things like the address book or user policies. If your account does not have or use the features associated with certain fields, they return as blank.

Bandwidth detail

Reviews all uploads and downloads, including details about those transfers.

Bandwidth summary

Reviews all uploads and downloads, including details about those transfers.

Messaging

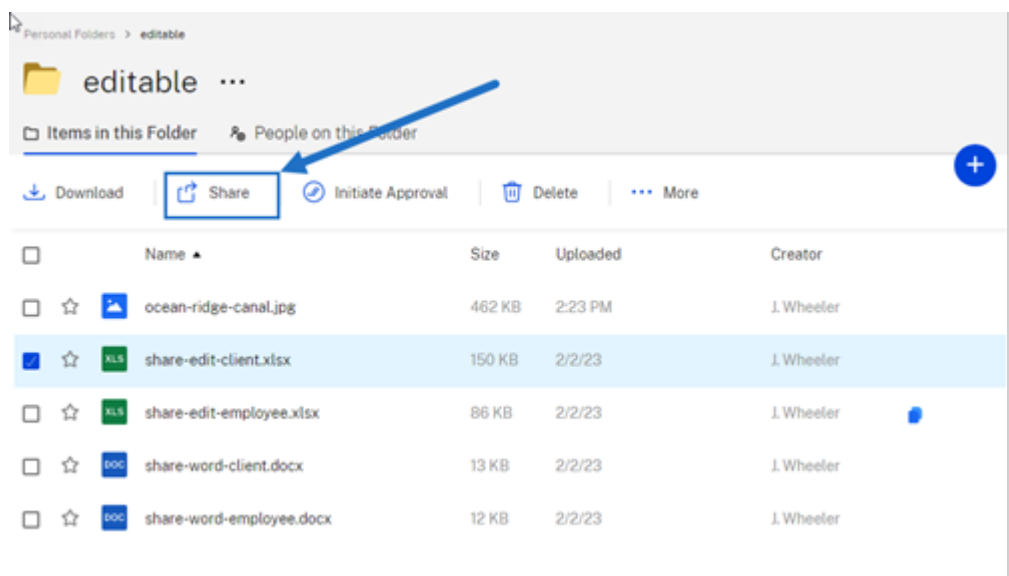Details all messages and links created by the specified user.

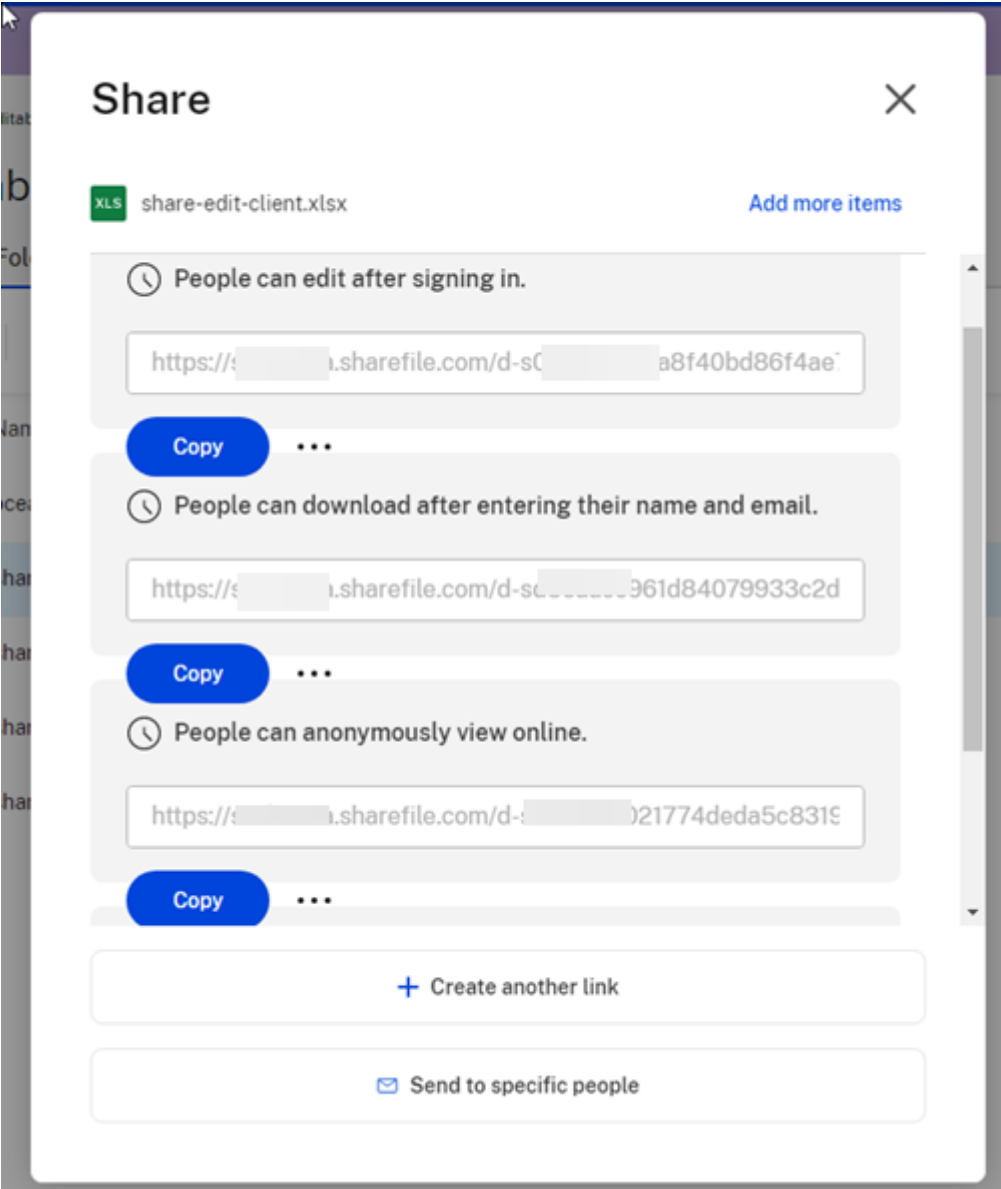# Share files

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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.

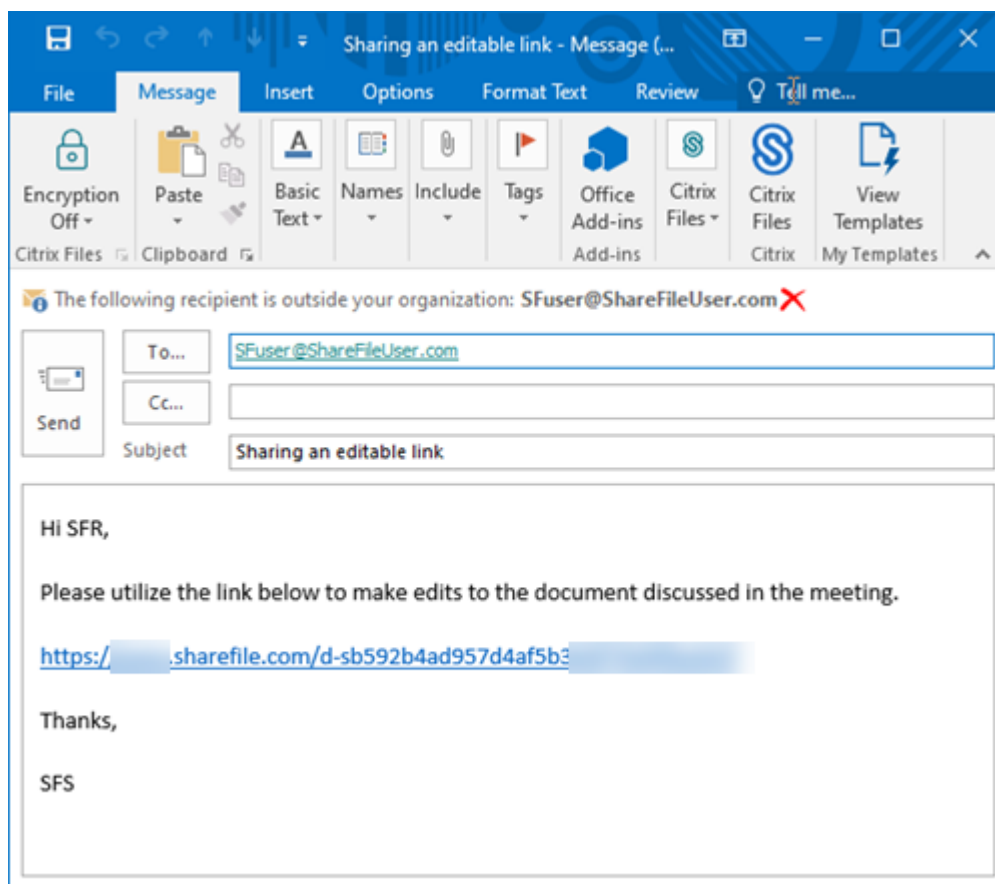2. Select the file or files that you want to share.

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

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

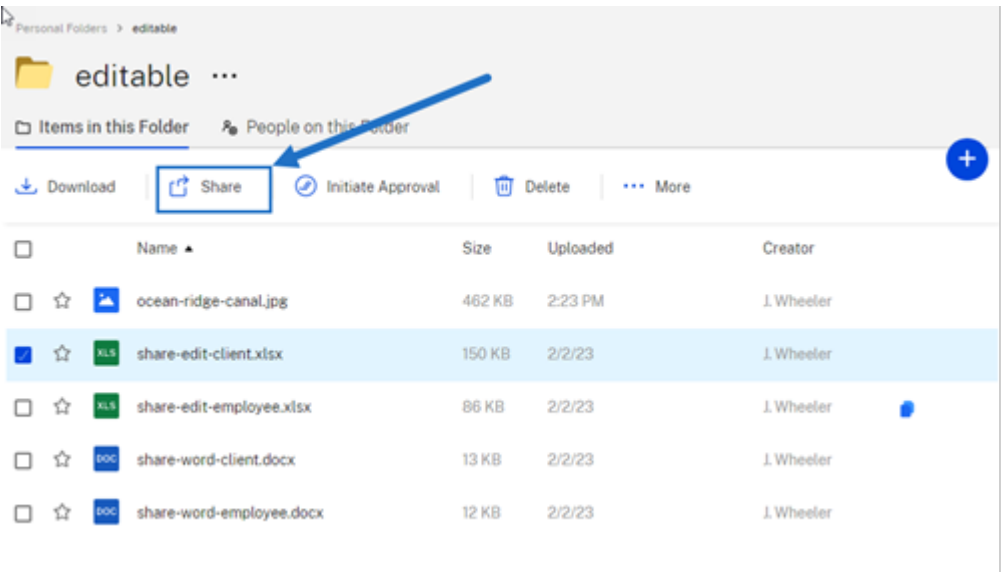The **Link copied to your clipboard** message displays briefly.

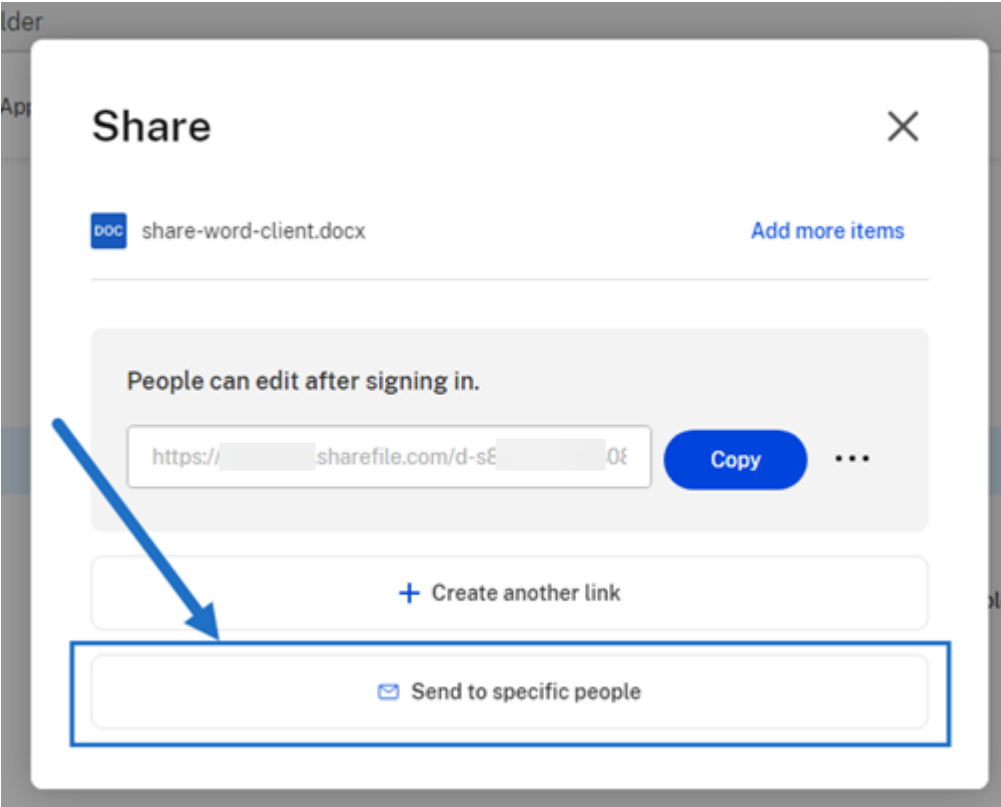5. Use the copied link to share with your email or another communication app.

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**.
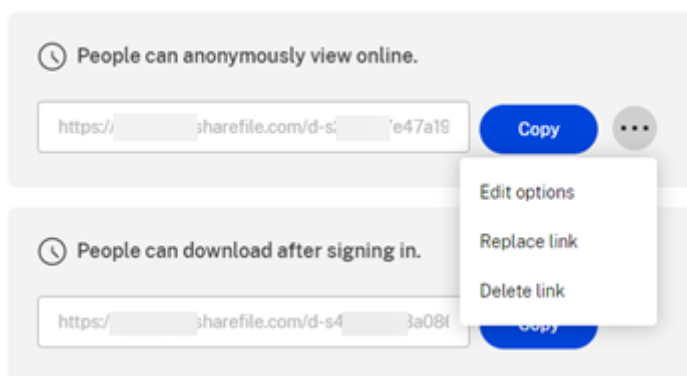
- **Notifications**:

  - 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**:

    - **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.
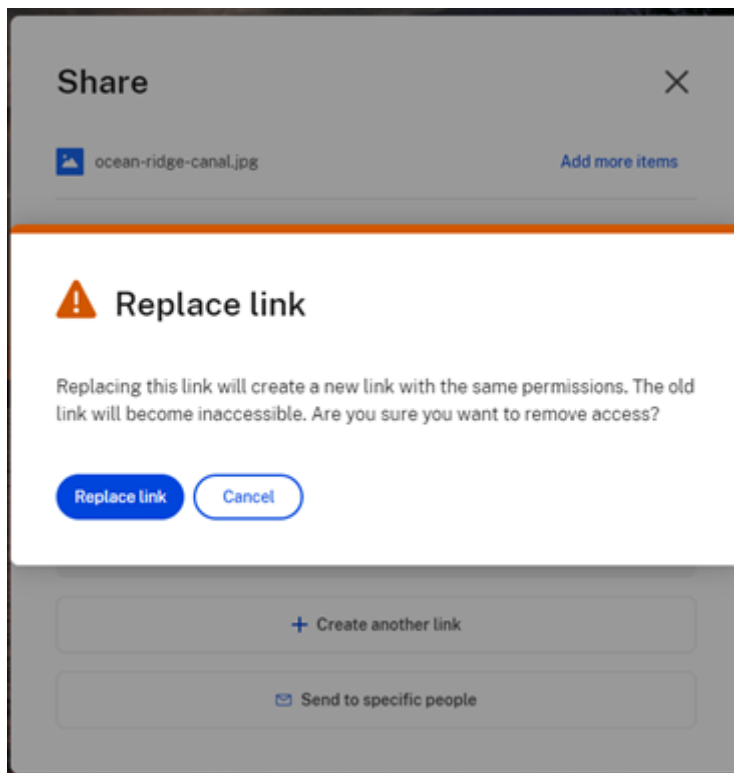
- **Who can access this link**:

    - **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 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.
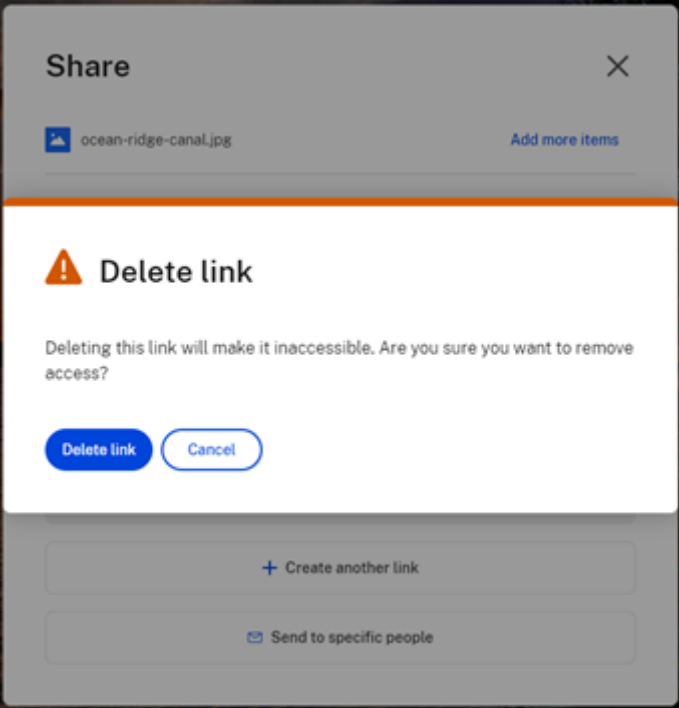
Notifications   This check box default is set for the sender of the file to receive notifications when the file is accessed. If you prefer not to receive this notification, uncheck the box.

Replace link

Replace link allows you to create a new link with the same permissions. The old link will become inaccessible.
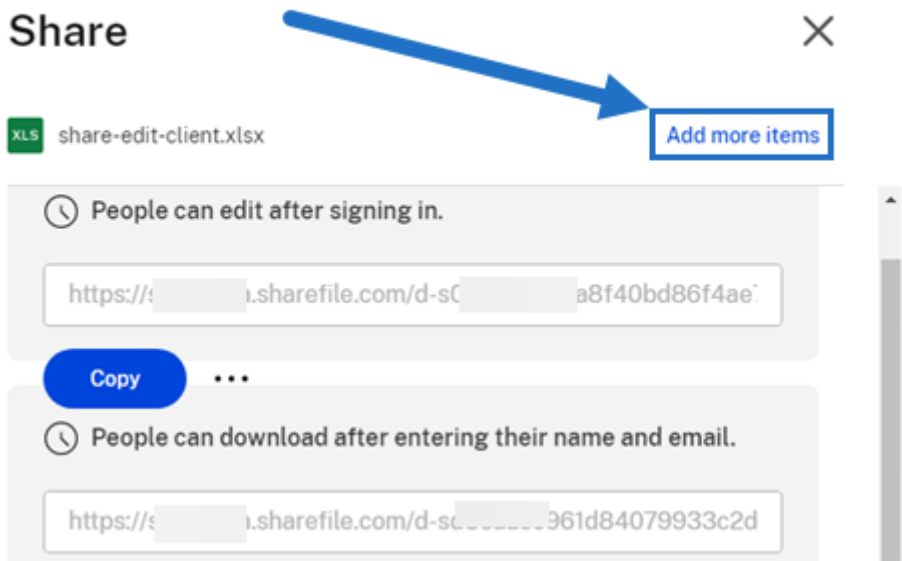
Delete link

Delete link allows you to make the link inaccessible. A new link is created by starting the share process again.

Add more items

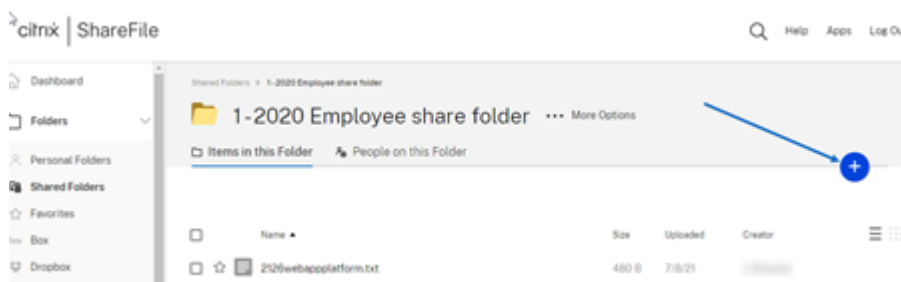To add more items to a share link, select **Add more items**.

You are provided the option to add more files from ShareFile or from your device.
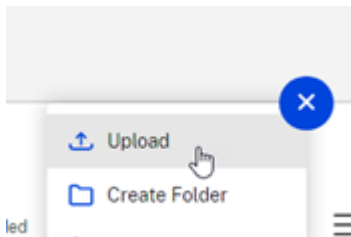
Upload files

July 19, 2023

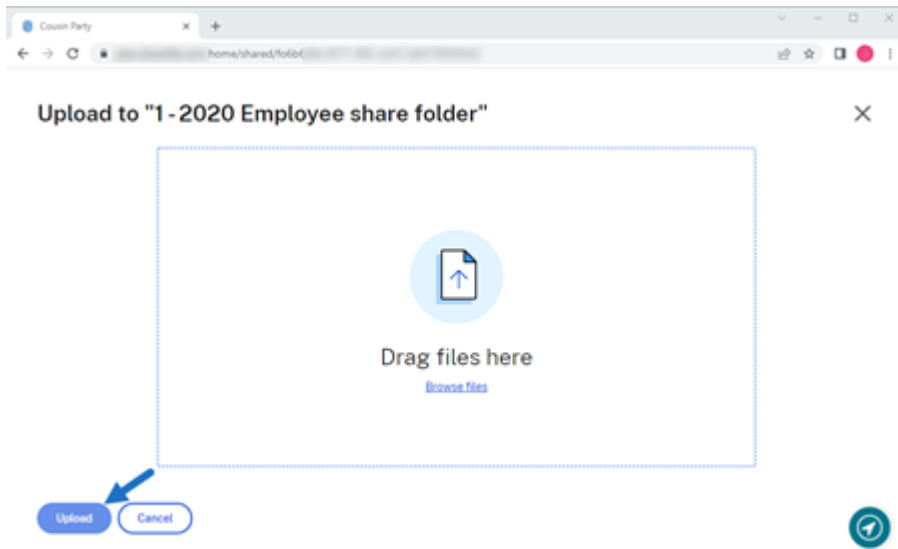The following steps explain how to upload files using ShareFile once you have created a folder.

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**.