KONICA MINOLTA

Giving Shape to Ideas

FileAssist

User Guide

cloud

Table of Contents

Table of Contents Continued

Table of Contents Continued

start

I. Getting Started

i. Logging In

Need to know how to login to your FileAssist account? Having trouble logging in? Here you'll find step-by-step instructions for accessing your account, as well as some of the common problems you might encounter and how to solve them.

You will be given a certain login URL by your administrator. Such as "https://private.file-assist.com/yourcompanycode/"

Let's Get Started:

1. Go to the URL provided by your administrator.

2. Enter your **Username** and **Password.**

3. The Main View page will be displayed after logging in. The first time you open the web interface, it will take a moment to download the site content, but this shouldn't be a problem on future logins. Your browser will start caching this information to speed up the entire site dramatically during future visits.
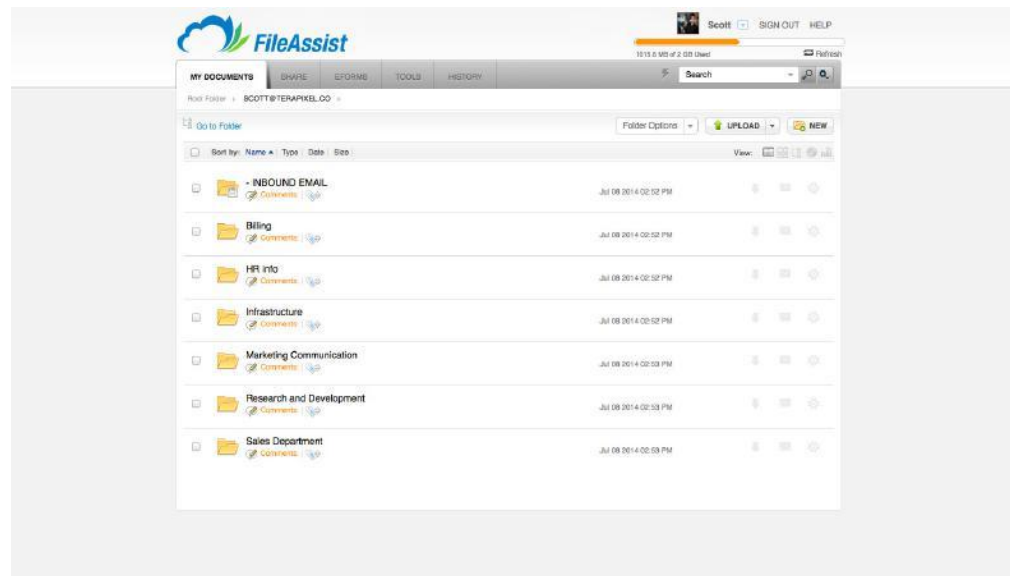
Common Login Problems

Forgot Username/Password

Did you forget or lose your username/password? Don't worry, that happens to many customers. Simply click the Forgot Password link on the login screen. You'll be prompted to enter identifying information that allows us to recover your username/password and email you. Get in touch with the FileAssist Administrator at your organization. She/he has the authority to recover your password.

Problem with Password

Passwords are **case-sensitive** and must be alphanumeric, so please be sure follow the correct capitalization on passwords.

Session Timeout

The Timeout message appears normally after several hours of inactivity. If the Timeout message prevents you from logging in, it means that cookies or JavaScript are being blocked, or content filtering is enabled. Click here for instructions to resolve the Timeout message.

ii. Logging Out

You've probably logged into an account somewhere on the web, then left the site without signing out. It's something that most Internet surfers don't give much thought. Did you know that when you login to a site, but don't sign out, your session remains open in the background? This is true of your FileAssist account as well. Even if you move on to visit other websites, you can return to FileAssist using the **BACK button** on your browser and continue where you left off until you sign out or shut down your web browser.

It's always best to sign out of any session you begin on any site to protect your important information. If you do not sign out and leave your computer unattended, it is possible for someone else to use the computer to return to your open FileAssist session. You can find the **Sign Out button** in the top right-hand corner of your screen. Make this button your friend!

Signing Out is Always Recommended

When you are finished with your current session, it's a good habit to sign out. It only takes a second, but provides an added level of security. Signing out closes your open connection with the FileAssist server, terminating the session connection to the FileAssist web service. It prevents another user from accessing your account, especially if you are working on a computer shared with other users. This also clears resources reserved on our server to maintain your active session.

Automatic Sign Out Feature

In case you forget to sign out, we have implemented an Automatic Sign Out security feature. After a long pause in activity, the Automatic Sign Out will close your session with FileAssist. Then, any attempt to connect with the FileAssist server from your earlier browser session will cause a Session Timeout warning to be displayed. After you press **OK** on the Session Timeout warning, the FileAssist home page will be shown. You may login again to reopen the session with FileAssist.

iii. Your Profile

Your profile stores lots of important information including your email address and contact information. That's why it's essential to keep it up-to-date. This article provides an overview of the Profile Options.

1. Click on your name in the top right corner to bring up the provided menu.

2. Select **Profile/Account.**
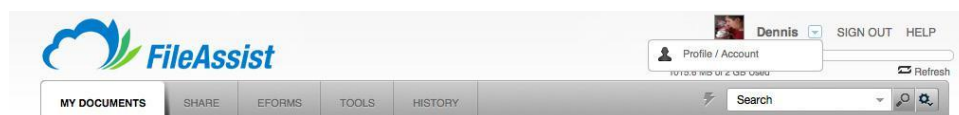
Profile Options Tab

Need to update your contact info? Sure! The **Profile/Options tab** can assist you with just that. Make sure you save all changes made in your profile before navigating away!

Contact Info Section

Update or make changes to your contact information.

(i) Changing Contact Info

Need to update your contact information? We can certainly help you with that! It's a very simple procedure, but one that's important. Make sure that you make necessary changes to your contact information as soon as possible!

start

Let's Get Started:

1. Login to your FileAssist account.

2. Click your Account Name in the top right and choose **Profile/Account.**
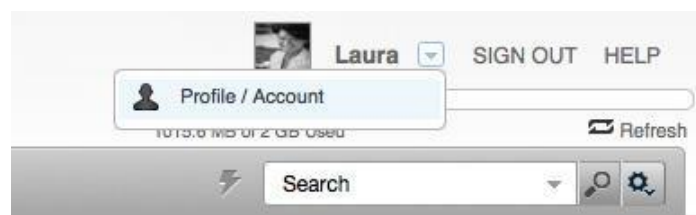
3. Proceed to the **Contact Info Section** and make the appropriate changes.

4. **Click the Update Information button** to save your new contact information to your account.

(ii) Changing Your Password

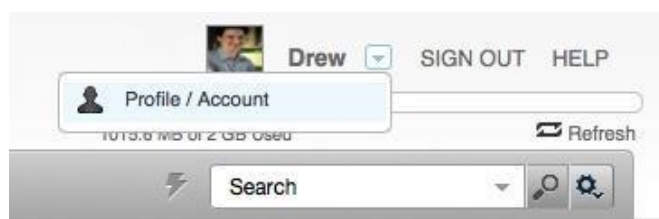Whether for security reasons or easier access, it's fast and easy to change your password. You will need to know your current password in order to login and after that, it's as simple as a few clicks. Just follow the steps below!

Let's Get Started:

start

NOTE: It's important to choose a strong password. FileAssist recommends you select a password that contains seven or more alphanumeric characters, including at least one number. If you need more password security, consider a Private Site.

1. Login to your FileAssist account.

2. Click your account name in the top right and choose **Profile/Account.**

3. Choose Password & Data Security on the left.

4. Enter your old password.

5. Enter your new password and confirm.

6. Click **Save Changes.**

IMPORTANT INFORMATION ABOUT PASSWORD CHANGES

- Passwords are case sensitive.

- If you sign out of your FileAssist session immediately after a password change, please allow a few moments for the system to apply the new password. If you have any problems logging in with your new password, please <u>contact us.</u>

- For security purposes, never give out your password and change your password at least every 90 days.

(iii) Changing Email Address

Well, this one is pretty self-explanatory! If you need to change the email address associated with your FileAssist account, you can simply follow these instructions.

start

Let's Get Started:

1. Login to your FileAssist Account.

2. Click your account name in the top right and choose **Profile/Account.**

3. Next to your Primary Email, **click Change.**

4. Enter your new email address and **click the Change Email button.**
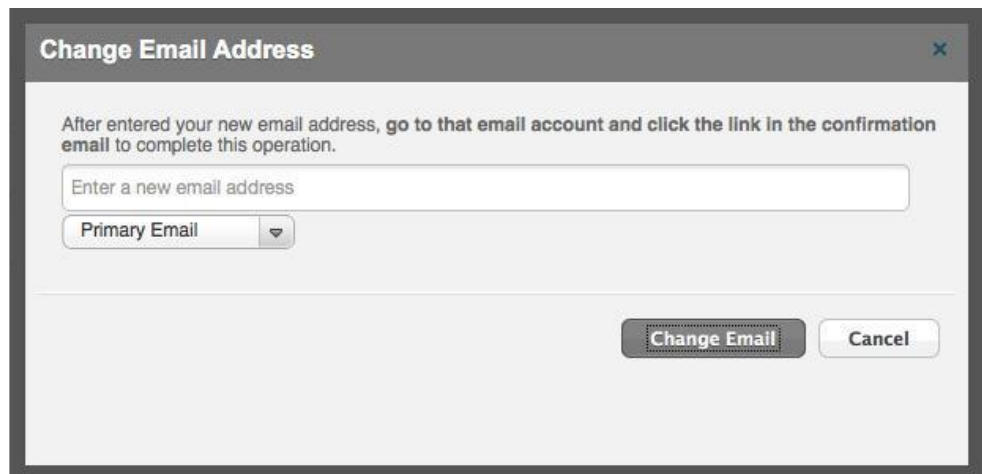
iv. Views

View Types

There are four different view types: **List View, Icon View, Tree View, Chart View** and **Bar View.**
To switch between the views **click on the icons below the Upload** and **New Folder buttons.**

'Breadcrumbs'

Each of the view types (excluding Tree View) contains a **'Breadcrumb' navigation bar.** If you need to go back to another folder higher up in your directory, simply click on the folder you wish to return to.

List View

This view displays each of the folders within a selected directory in individual rows with boxes to their left **(circled in red).** When multiple boxes are checked, a light-blue bar will appear **(see red arrow)** with various actions available such as downloading the file or sharing it **(see red box).**

To the far right of the row, opposite the checkbox **(bordered in black),** are actions available to the folder just like above. From left to right they are **Download, Share File/Folder** and **Advanced Options.**
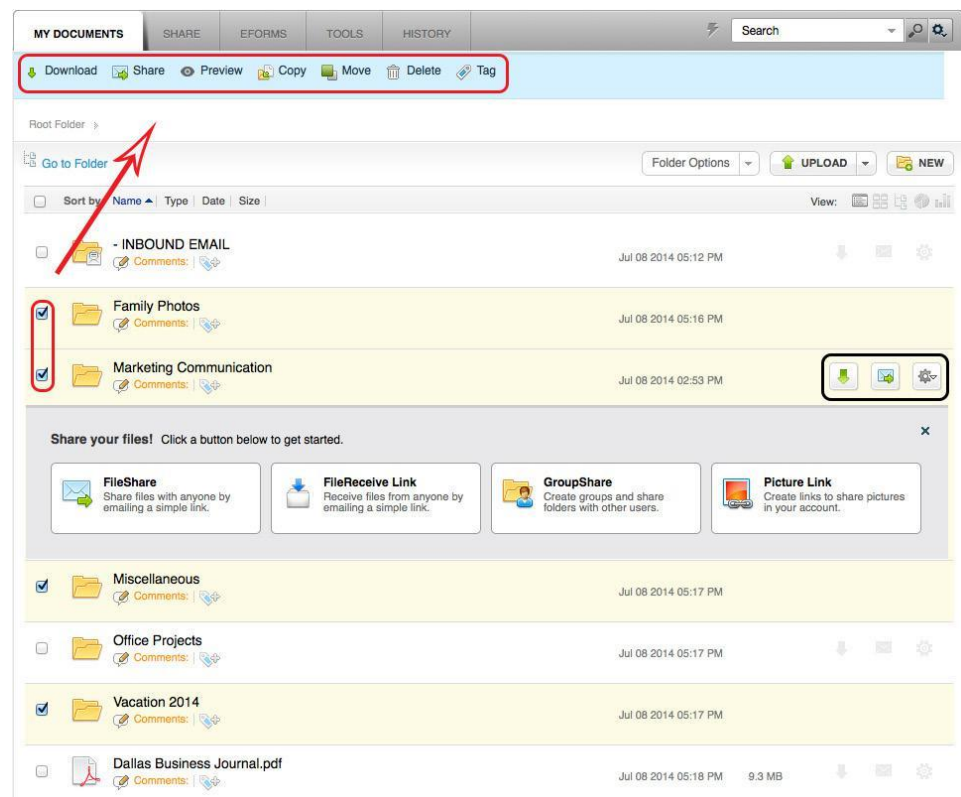
Icon View

This view resembles the desktop of a computer in that each folder is represented by an icon. **Click on a folder** to view its contents. If you move the cursor over a folder a small arrow pointing down will appear **(as circled in red).** Clicking on this arrow will produce **a drop-down menu** with a series of options.
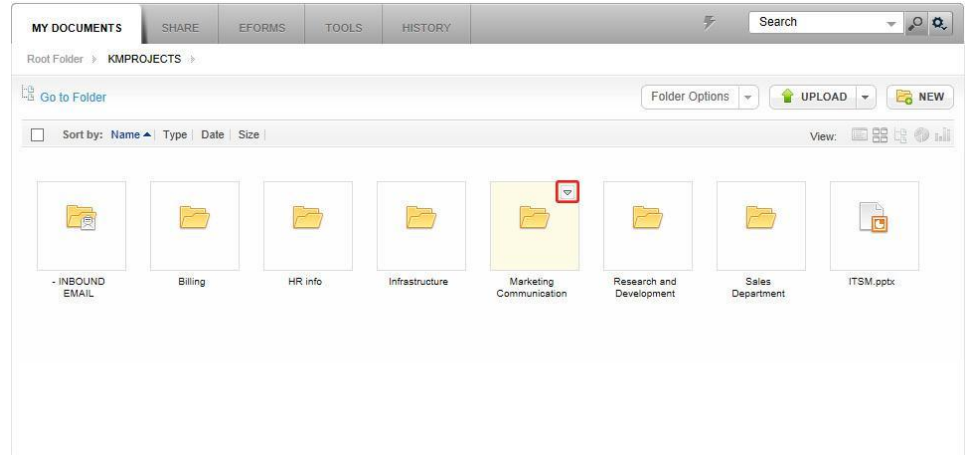
Tree View

Possibly the most revealing view type, Tree View displays the Root folder and each directory within it. **Click on the plus/minus boxes left of the folders** to expand or shrink down the folder paths. **Right click on the folders/files** to select additional options, such as **Preview, Download** and **Sharing.**
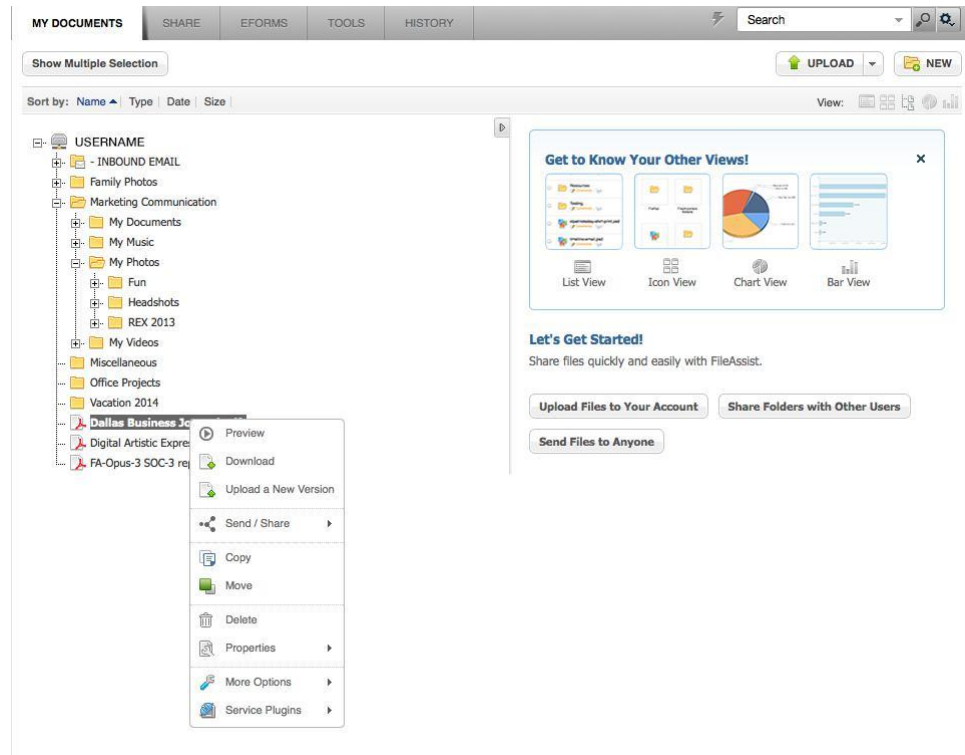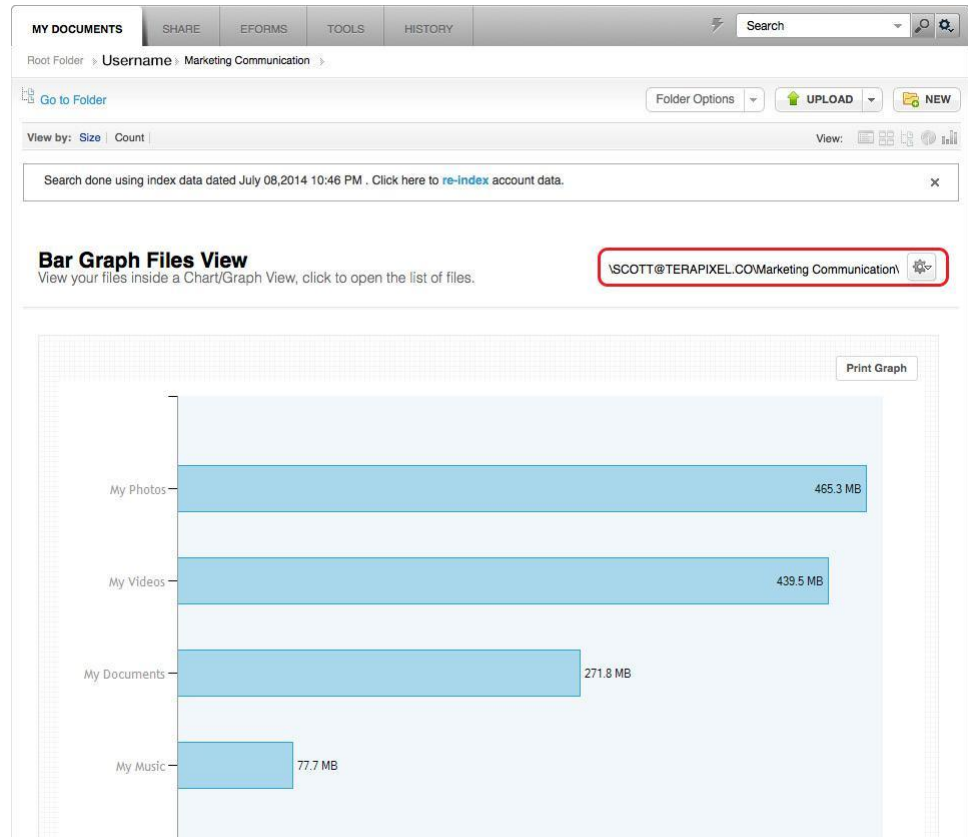
Chart View

Represented as a pie chart, this view provides a more visual representation of your folder size.
When the cursor hovers over a slice of the pie a small text box will appear and display the folder name, the number of files inside the folder and the total size of the folder and its contents. **Clicking on the slice** will open the folder and a new pie chart will appear based on the contents of the selected folder. The current folder path is located in the top right-hand corner **(red box)** of the Chart View.
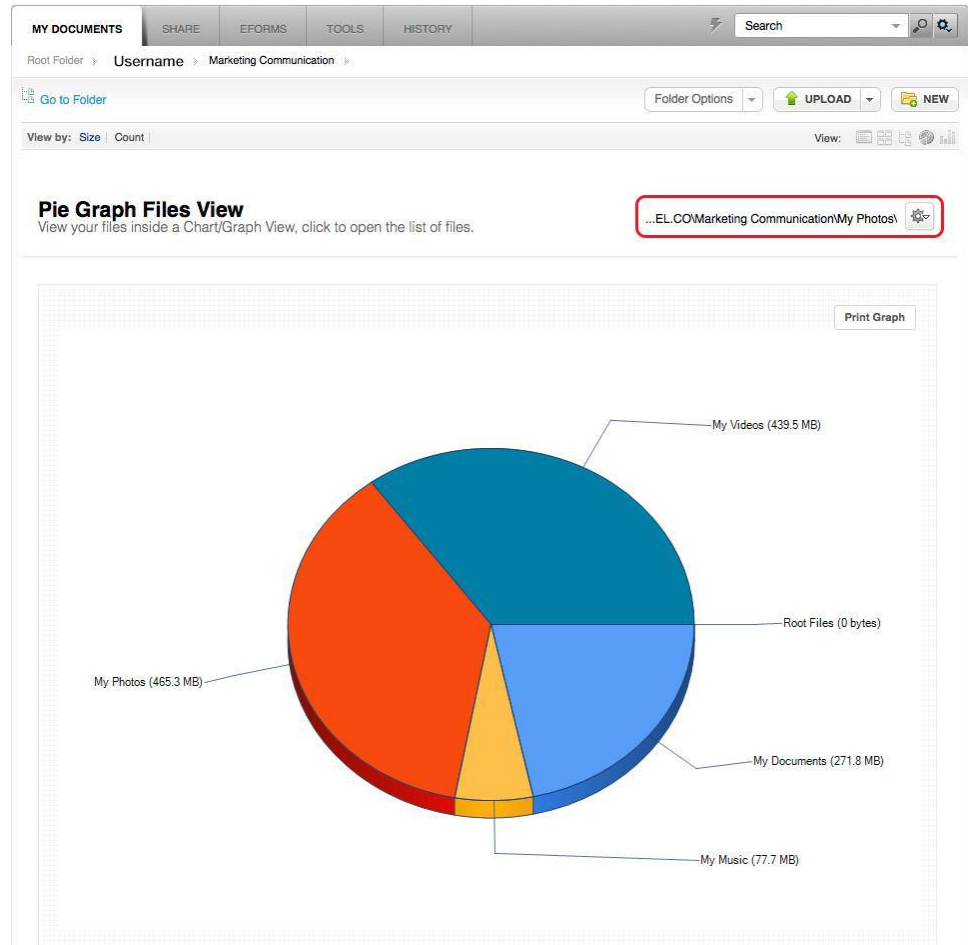
Bar View

Much like the Chart View, this view displays the folders in a selected directory and their sizes compared against one another. The top right hand corner **(red box)** displays the file path. If you hover your cursor over one of the bars a small window will appear with more information about that folder, such as number of files, folders and the size.

v. Compatibility

FileAssist Takes Compatibility Seriously!

With FileAssist, you can access, collaborate, edit, backup, share and sync from wherever you are in the world, without worry about compatibility. Our developers and testers have taken considerable time and measure to ensure feature compatibility between Windows and Mac platforms, on mobile devices, and across software applications.

Windows and Mac

Feel free to choose your favorite platform and still enjoy a seamless experience! All FileAssist accounts are both Windows and Mac compatible. Additionally, all popular web browsers are supported. This means you can enjoy all the advanced features FileAssist has to offer through Microsoft Internet Explorer, Mac Safari, Firefox, Chrome, Netscap, AOL and Opera.

Mobile Devices

We understand that you are constantly on the go and access to vital information from mobile devices isn't just a convenience—it's a must! In addition to apps for the iPhone, iPad and Android, FileAssist mobile site provides access anywhere, anytime.

FTP, SFTP and WebDAV

You've heard the saying, Work smarter, not harder. FileAssist makes it possible. Compatibility with all FTP, SFTP and WebDAV software applications. Additionally, your account has direct file access via WebFolders or FTP on mobile devices.

vi. Supported File Types

FileAssist supports any type of file in regards to storing them in your FileAssist account. However, only certain files types can be viewed and/or edited directly from our website. Below is a list of supported file types for online interaction.

Image Files for Online Viewing

jpg, jpeg, jpe, jfif, gif, png, bmp, wmf, dib, tif, tiff, emf

Music Streaming

mp3, aac

Document Viewing

doc, ppt, xls, pdf, vsd, txt, rtf, wri, pub, dot, xlt, wq1, wks, wk3, wk4, docx, dotx, xlsx, xltx, xlsb, pptx, ppsx, docm, dotm, xlsm, xltm, pptm, ppam, ppsm, lwp, ans, htm, html, wk5, wki, wku, wpd, psw, pwd, pab, olk, mcw, xlw, pps, log, dxf, svg, vdw, vdx, vss, vst, vsx, vtx, slk, odt, mpp, mpt, vsdm, vsdx, vssm, vssx, vstm, vstx

Video Streaming

avi, mpeg, mpg, qt, dv, aac, aif, aiff, mov, mp4, 3gz, 3gp, 3g2, m2v, wmv, asf, wma, m4v, wav, flv, webm, mpeg-1, asf, nsv, seq, mxf, cin, gxf, avs, wve, uv2, fli, flc, cin, wc3, mpeg4, vob, mpeg-4, dvb

Online Editing Using Zoho

xls, csv, sxc, xlsx, ods, tsv, doc, docx, rtf, txt, odt, sxw, html, ppt, pps, odp, sxi, pptx

Online Image Editing

jpg, jpeg, jpe, jfif, gif, png, bmp, dib
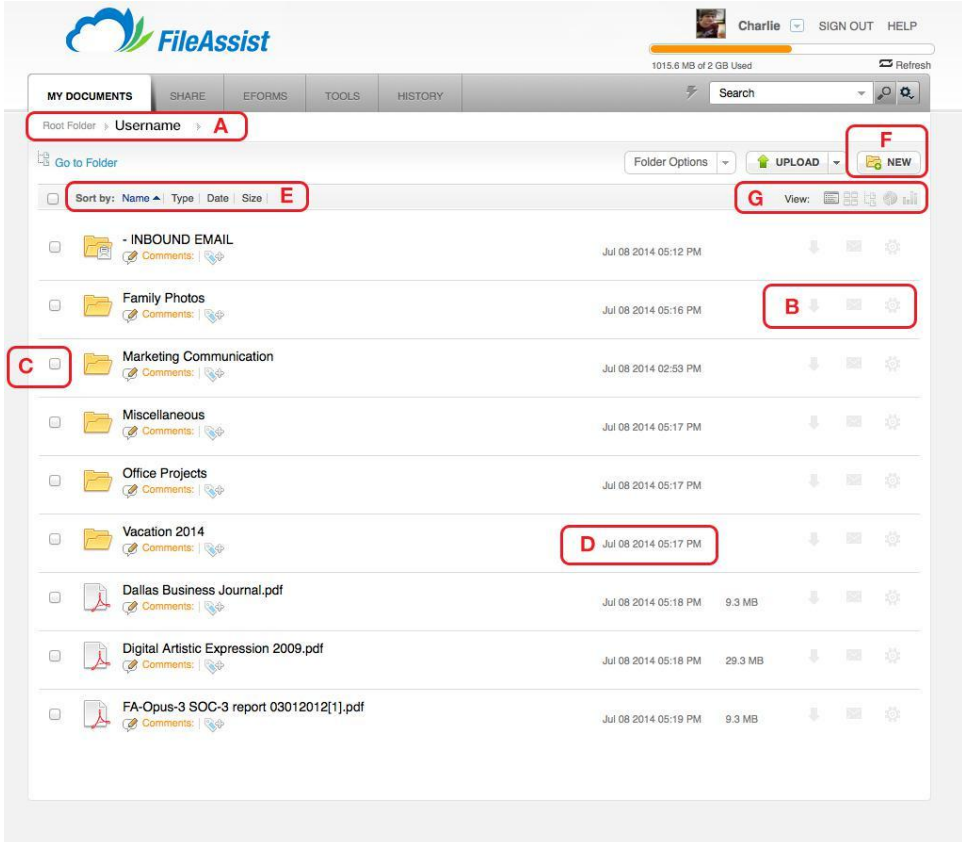
AutoCad Viewer

dwf, dwfx

Flash File Viewer

swf

II. My Documents

i. My Documents Tab Overview

My Documents is the section of your account where all of your files are located. From here users can send documents, rearrange them, change the folder settings and generally perform any action they need to inside this section. There are different views, each of which will be covered, though the difference between them is minimal.

List View

A: The folder pathway displays the location of the folder or file and each folder that users must navigate through to reach the location/file.

B: These three buttons are Download, Share File/Folder, and Advanced Options.

C: This checkbox allows users to select multiple files to perform an action on multiple folders at once.
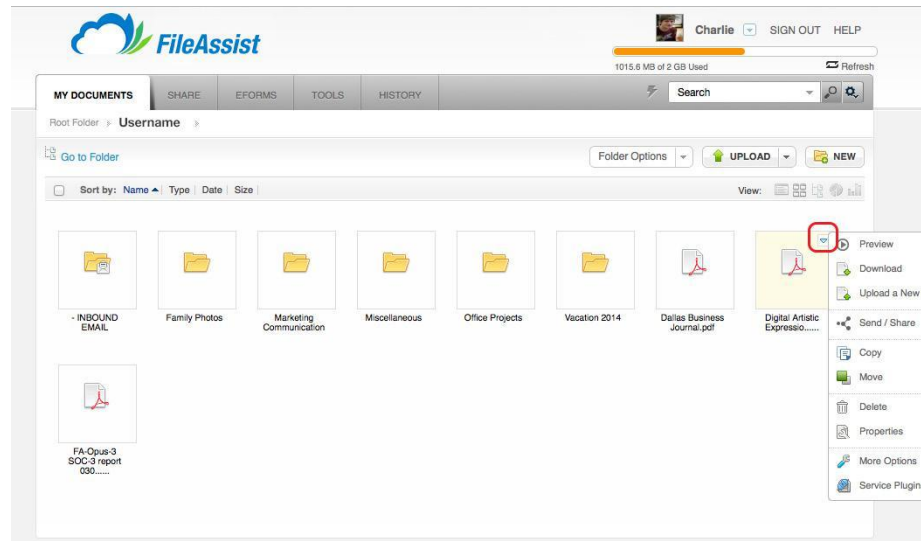
D: This date is the last date the folder was modified.

E: Click on one of these words to sort the files by a different parameter.

**F:** Click here to create a new folder.

G: Users can view My Documents in a different view, which you can learn more about <u>here.</u>

Icon View

The main difference between List View and Icon view is how the folders are displayed. Each folder has a down arrow in the top right corner which users click on to access the folder options or actions related to a file or folder. Other than that, this view behaves almost identically to the List View.

Tree View
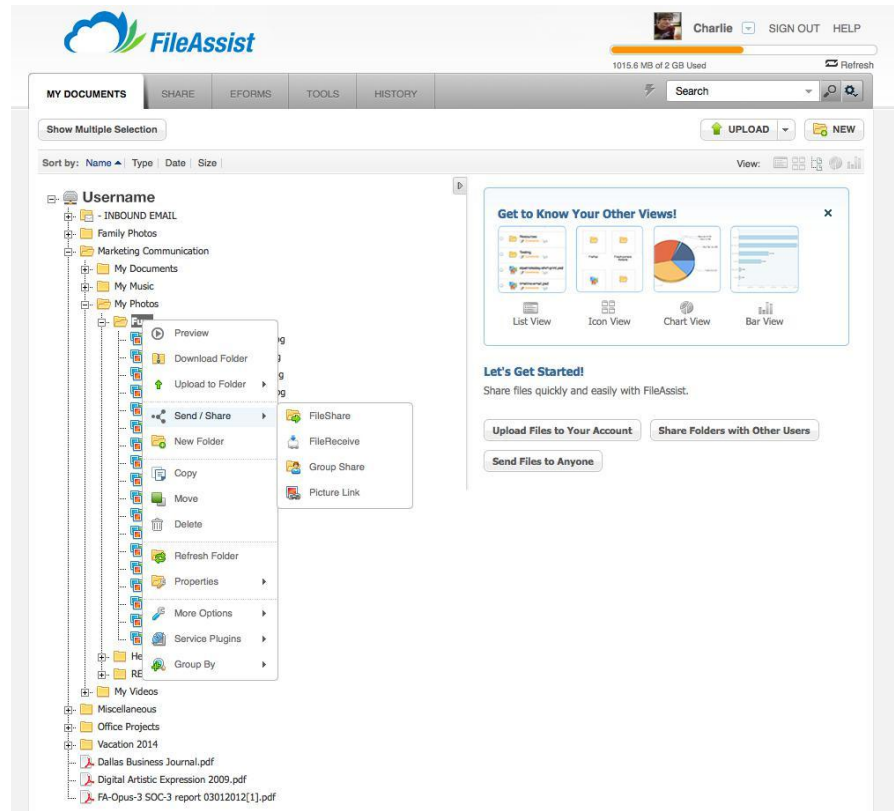
Tree View lists the file on top of one another with expandable folders (plus sign). Generally, this view is the simplest to use; right clicking on a folder displays all possible actions for a folder or file and the entire folder path is displayed. Users can even drag and drop files between the folders to rearrange their data.

Pie Graph Files View
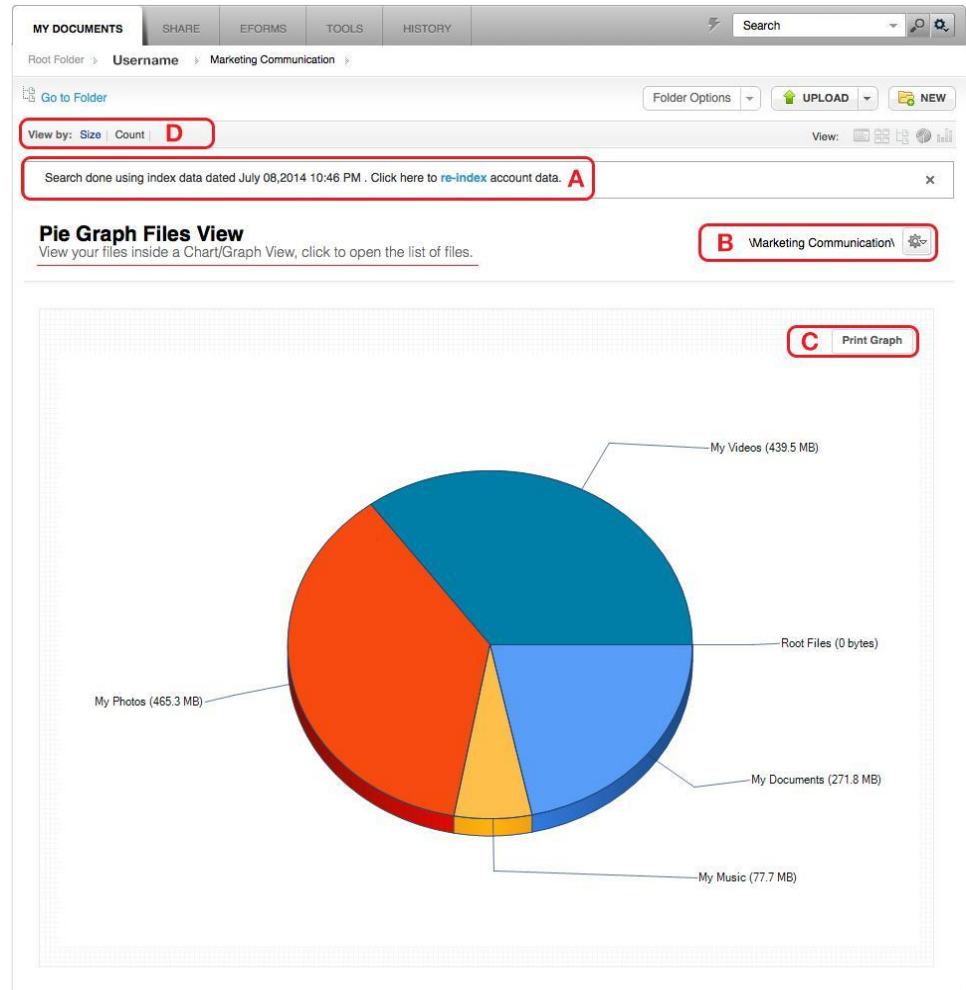
Users can click a section of the chart to enter a folder where the chart is reformed to reflect that folder's contents. This view type is useful for locating which folders contain a lot of data or take up a lot of space.

A: Re-indexing the account will update the graph to reflect any account (data) changes.

B: This is where users can access the folder options.

C: Users are able to print the graph.

D: View the pie chart by number of files or size of the files in each folder.

Bar Graph Files View
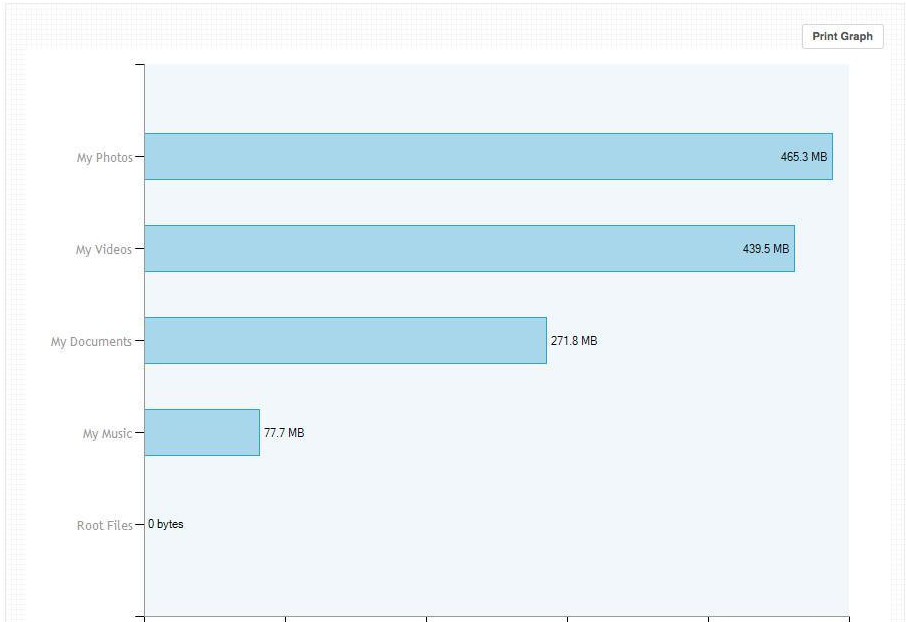
The bar graph view functions the same as the pie graph view; the only difference is how the view displays the data. Users may still click on a graph (instead of pie slice) to navigate inside the folder.

FileAssist

ii. Upload Methods
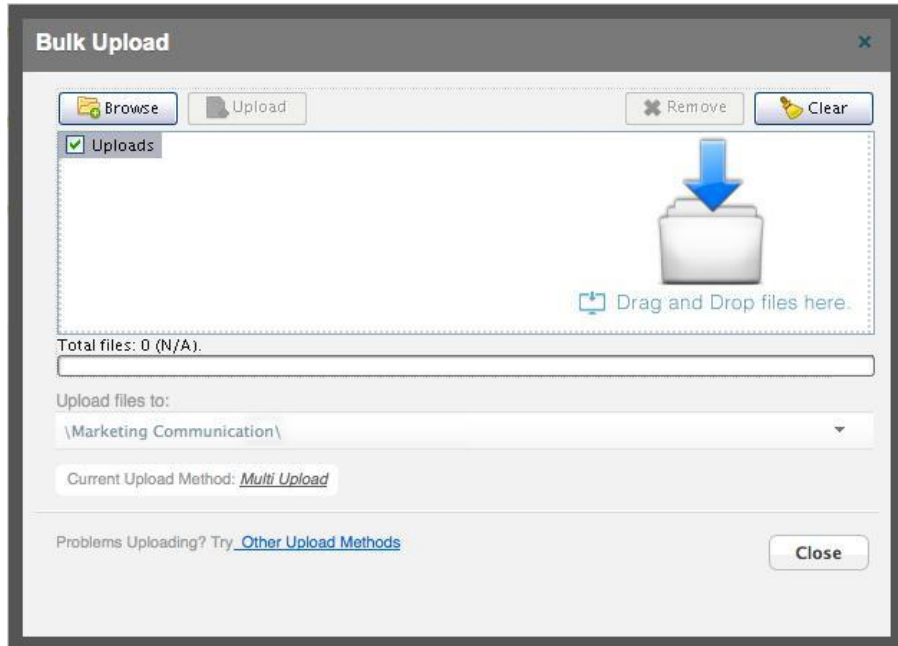
Standard Upload for Single Files
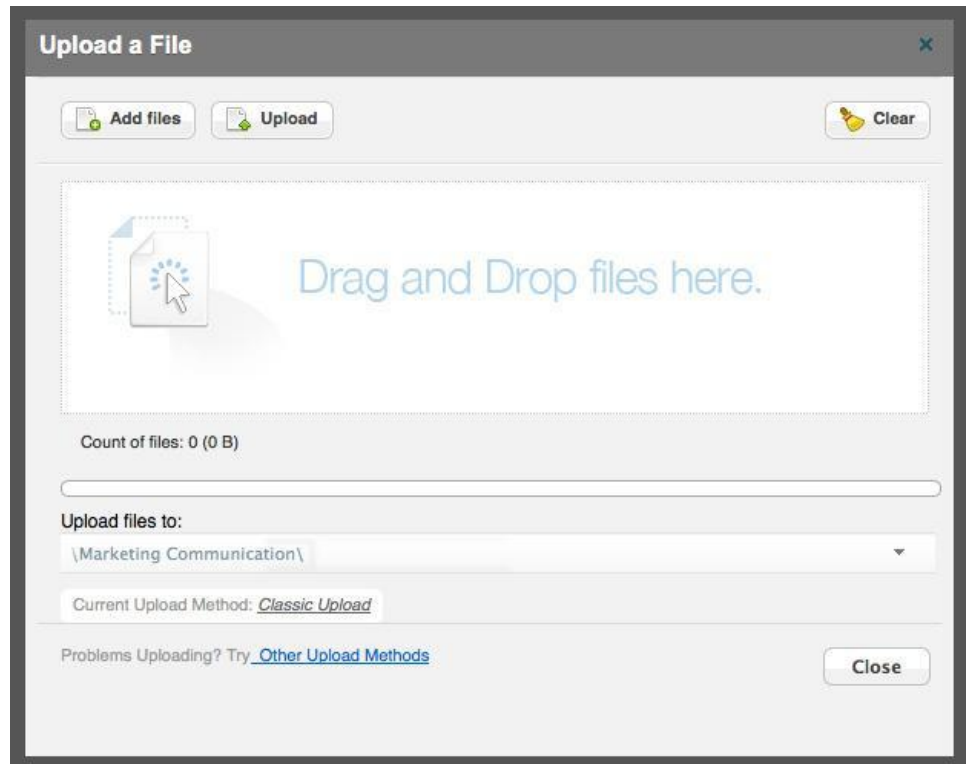
- Intuitive Flash interface.

- Fastest method to upload a single file or several individual files at once.

- Allows from 1–20 files at a time and up to 500 MB.

- Uses HTML, so no software or ActiveX required.

- SSL 128-bit encryption.

Bulk Upload for Folders

Need to upload more than just a few files? Upload an entire folder with the Bulk Upload tool!
Use the Upload Folders tab to drag and drop the folders you'd like to place in your account.

**NOTE:** You must have Java enabled in order to use the Bulk Upload for Folders.

- Intuitive Java interface.
- Upload entire folders or an unlimited number of files, up to 1 GB.
- Convenient drag-and-drop capability, as well as multiple file/folder selection.
- Completely cross-platform compatible (Win/Mac/Unix) using any current web browser.
- SSL 128-bit encryption.

## Other Upload Methods
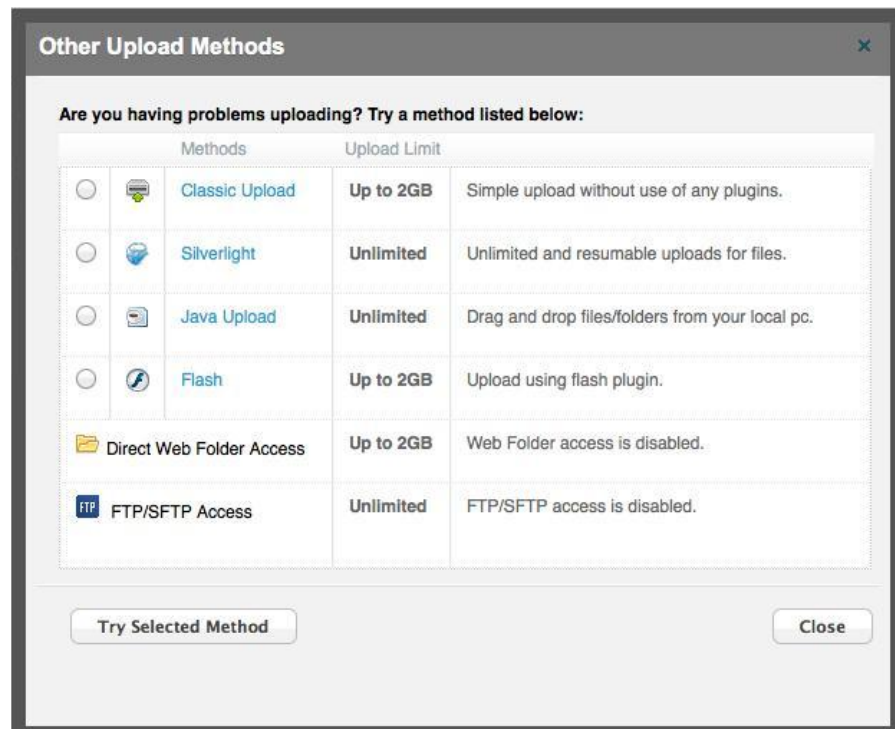
Silverlight

A Microsoft product, the Silverlight method is extremely similar to the Flash method and allows you to select multiple local files for upload to your FileAssist account.
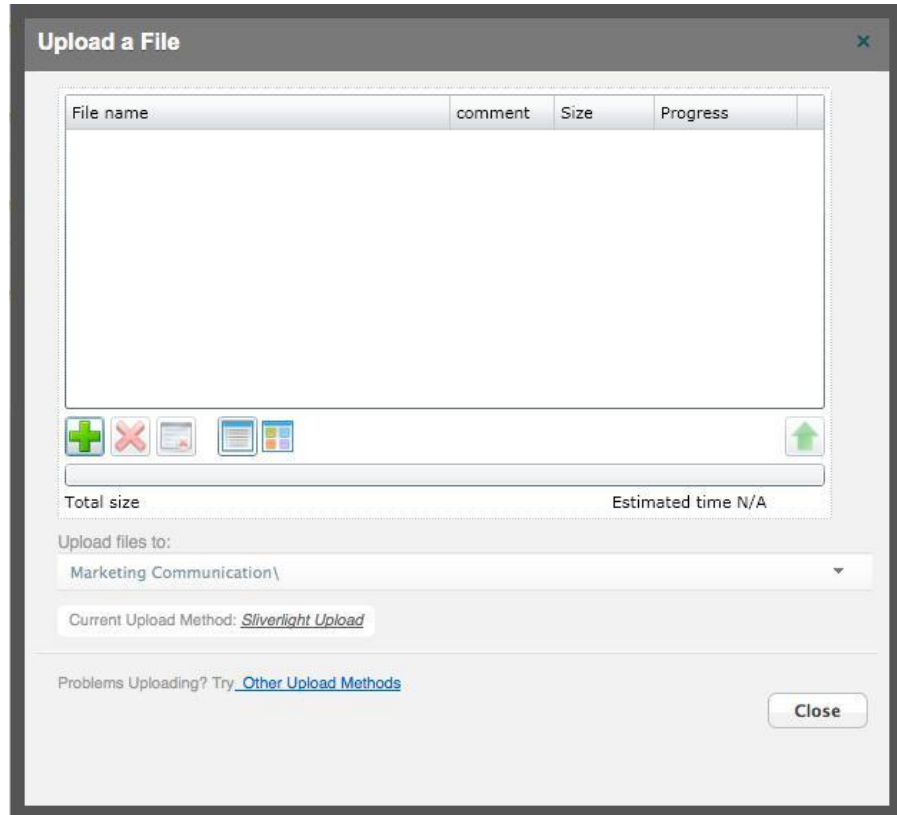
- Intuitive Flash interface.
- Upload a single file or several individual files at once.
- Allows from 1–20 files at a time and up to 500 MB.
- Uses HTML, no software required.
- SSL 128-bit encryption.

Classic Upload

Like the traditional way of uploading files? Use the FileAssist Classic Uploader!
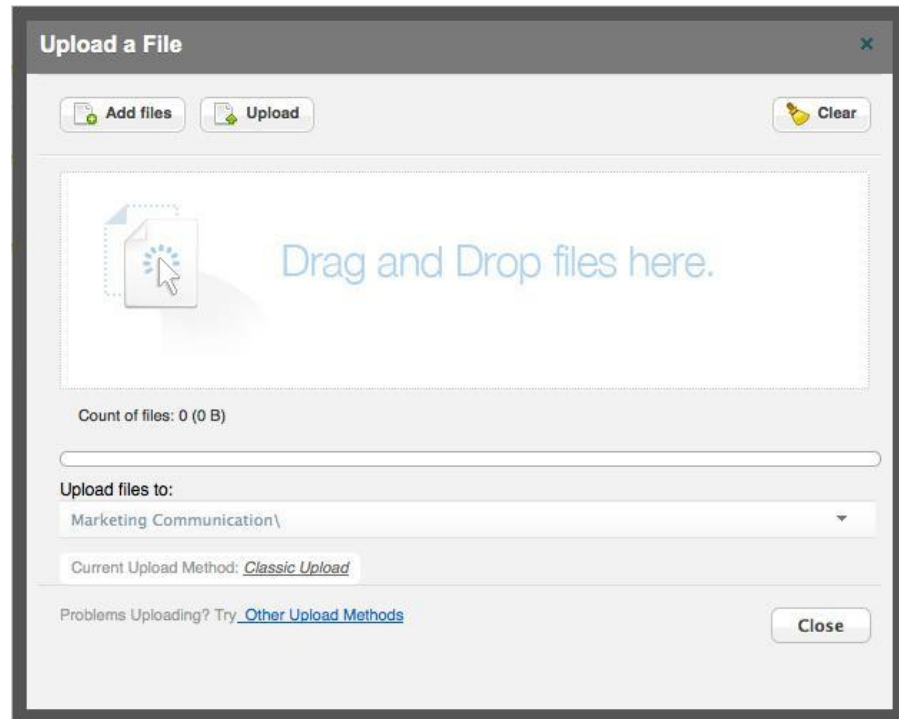
- Intuitive Flash interface.
- Upload a single file or several individual files at once.
- Allows from 1–20 files at a time and up to 500 MB.
- Uses HTML, no software required.
- SSL 128-bit encryption.

FileAssist File Backup

The FileAssist File Backup software can be used to transfer content to your FileAssist account through backup and synchronization jobs.

- Repeats incrementally (only backs up/syncs changed files).
- Allows for job scheduling.
- Great for large number of files and/or folders.
- Restore option to download files from backup.
- Version time stamps and compression option
- SSL 128-bit encryption and optional Blowfish encryption prior to transfer.

Direct WebFolder Access (Mapped Drive)

Get direct access to remote files by creating a web folder mapped to FileAssist account. This allows you to drag/drop or copy/paste files into the directory. To map a drive, follow these step-by-step instructions.

- Useful for drag/drop, copy/paste and editing directly to your FileAssist account from your local drive.

- SSL 128-bit encryption.

File Transfer Protocol (FTP/SFTP)

Use any FTP/SFTP software to transfer large files directly to your account. Note that FTP is not encrypted, while SFTP is the secure method. More information is available in our FTP/SFTP Overview.

IMPORTANT INFORMATION ABOUT UPLOADS

- Though it depends upon your Internet connection, uploads typically take longer than downloads to complete. Uploads that take a long time to complete may trigger timeouts. Once the file transfer is interrupted, it cannot be resumed but must be restarted. For this reason, we suggest large files are uploaded through methods such as FTP/SFTP to minimize interruptions.

- If you wish to interrupt a file transfer, you may do so by clicking the refresh button in your browser or the F5 key. Close your browser if you need to be certain that the upload was completely canceled.

- If an upload depletes all remaining drive space, then downloads will cease to function until files are removed to bring the plan back within the storage limits or the plan is upgraded.

iii. Creating a Subfolder

If you're like us, you have lots of files. What's a FileAssist user to do? Neatly organize data into subfolders, of course! You can create any number of subfolders in any structure that you wish. Subfolders within subfolders? Sure, categorize away! It's easy to make new folders with our intuitive user interface and familiar functionality. In fact, it just takes a few clicks. Simply select the parent folder and then follow one of the two methods below.
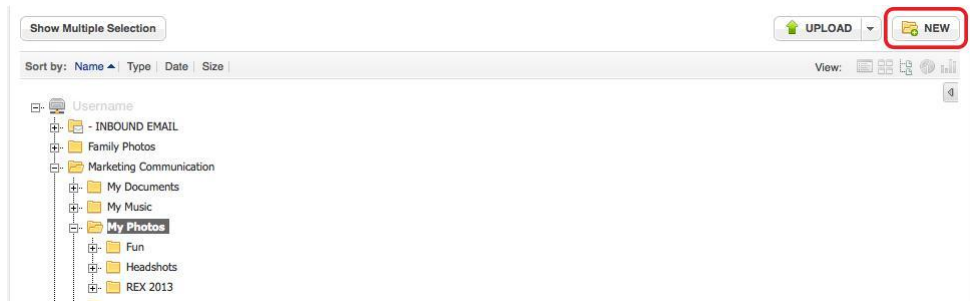
start

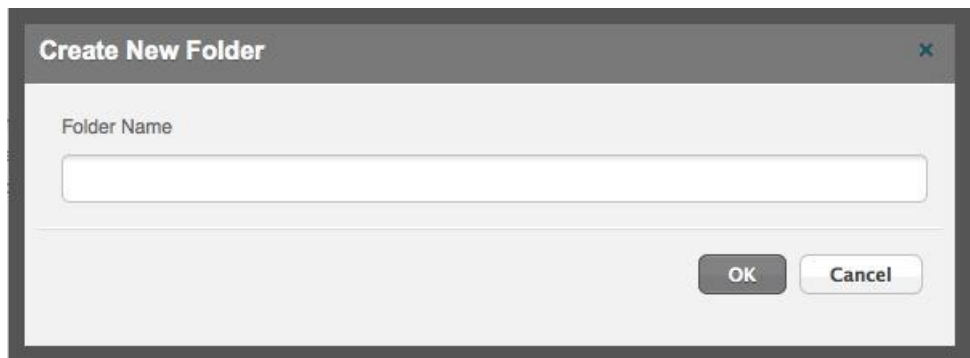### Let's Get Started:

Create a New Folder Using the Toolbar

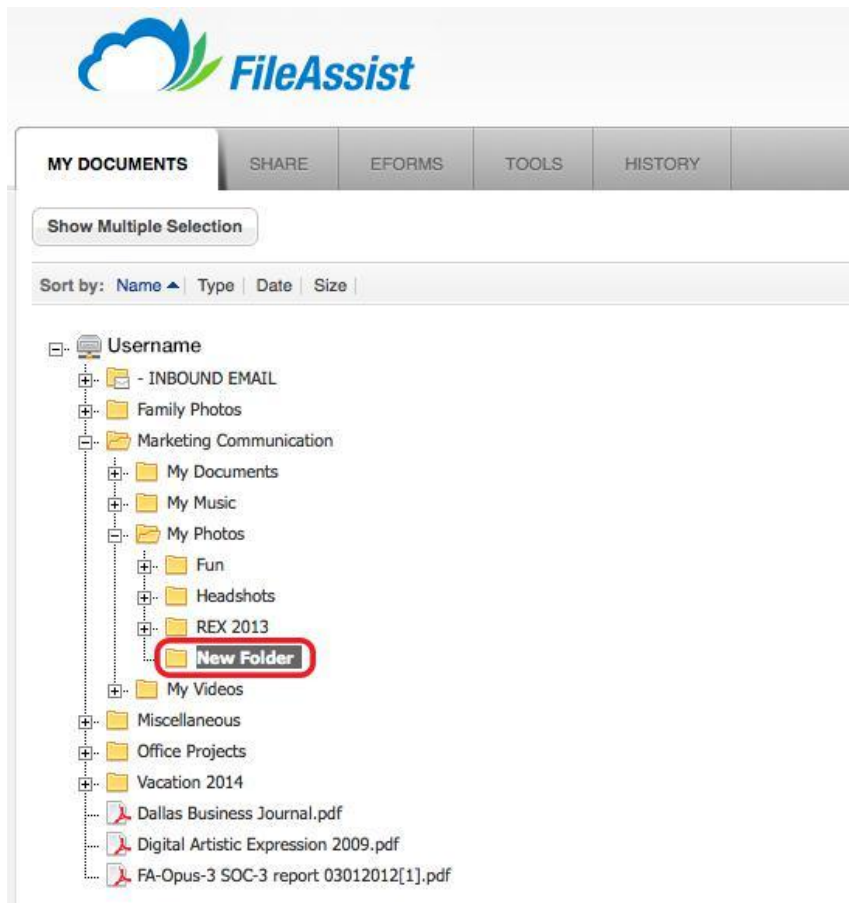**1.** Select the parent folder.
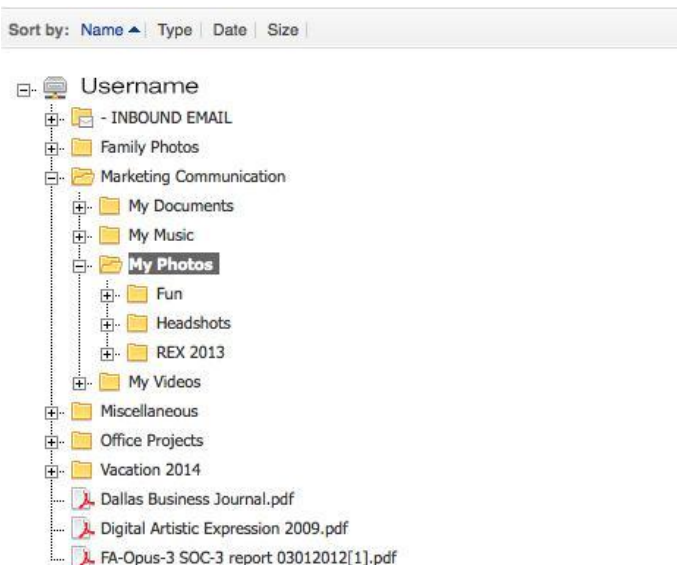
2. Click on New Folder in the toolbar.

3. You'll be prompted to enter the new folder name. **Then click OK.**
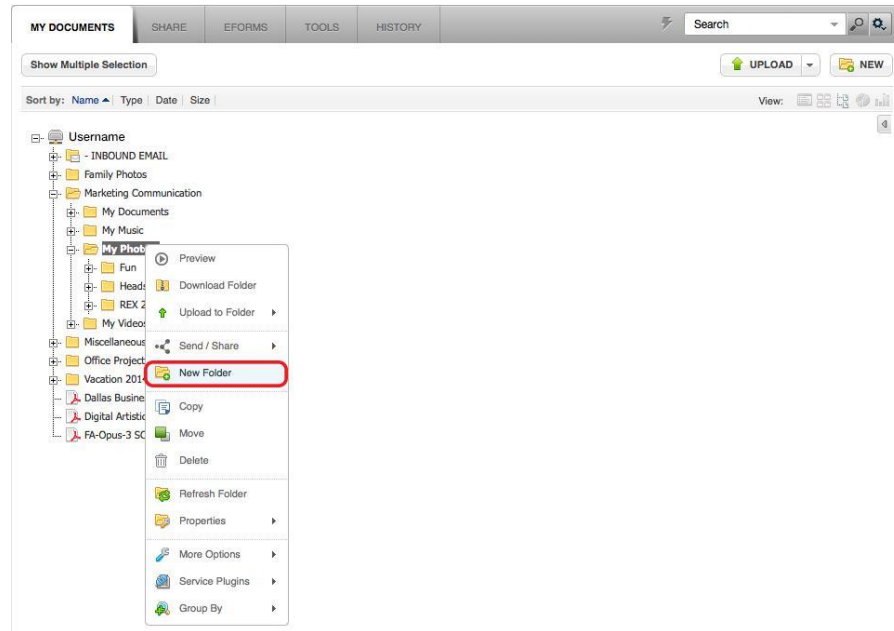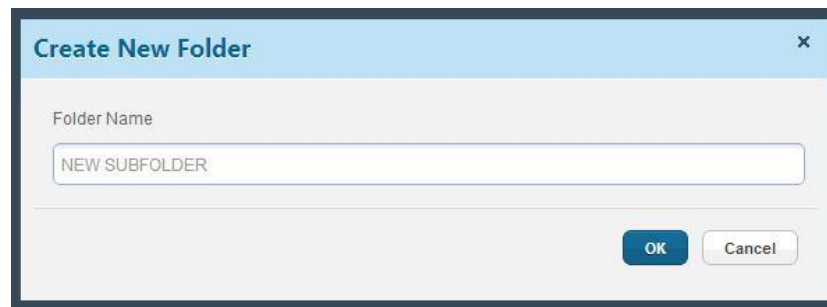

4. Your new folder will appear in the folder tree.
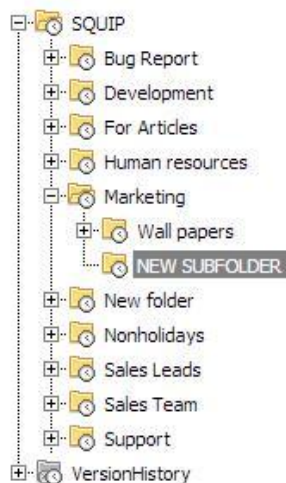
Create a New Folder by Right Clicking

1. Right click on the parent folder and **select New Folder.**

2. You'll be prompted to enter the new folder name. **Then click OK.**

3. Your new folder will appear in the folder tree.

IMPORTANT INFORMATION ABOUT CREATING A SUBFOLDER

- Once you have created a new folder, the screen will automatically refresh displaying the new folder in the folder tree. This may take a few moments.

- New folders may also be created in a **GroupShare™** in which you have full access.

- Try to use only alphanumeric characters and spaces in file and folder names to avoid problems.

- Certain special characters are not supported in the remote file or folder name, such as **\ / .. < > # % & '.** Though your operating system may allow special characters, they may not be allowed by FileAssist. Browsers might interpret some character combinations as executable codes and for security reasons, should not be included in file or folder names.

iv. Special Characters and Naming Files and Folders

Naming files and folders is straightforward, right? Yes, for the most part, you can name your files and folders whatever you like. However, there are a few exceptions. Inserting some common special characters into file names can create potential errors, so it's important to avoid them.

Valid Special Characters for File and Folder Names

Special characters are symbols such as **& (ampersand)** or *** (asterisk)**. Some require a shift key stroke, such as the special characters grouped in the number keys, while others do not, such as / (forward slash). Please note that there are only two special characters that should ever be used in file or folder names: **_ (underscore)** or **- (dash).**

Guidelines for Naming Files and Folders

It's important to only use alphanumeric characters in your file and folder names. The FileAssist system does not use warning popups to alert you to incorrect character use so be sure to take extra care when naming files and folders. If you currently have files or folders that contain special characters, make sure to rename them before moving forward or uploading additional files. Although you may not have experienced problems in the past, it's possible that issues may occur in the future if corrections aren't made.

v. Renaming Files and Folders

Want to rename a file or folder in your FileAssist account? Here we've provided an overview of how renaming a file works in **Tree View, List View** and **Icon View.**

In Tree View:

1. Right click on the file or **folder** you wish to rename, **select Properties** and **then Rename.**
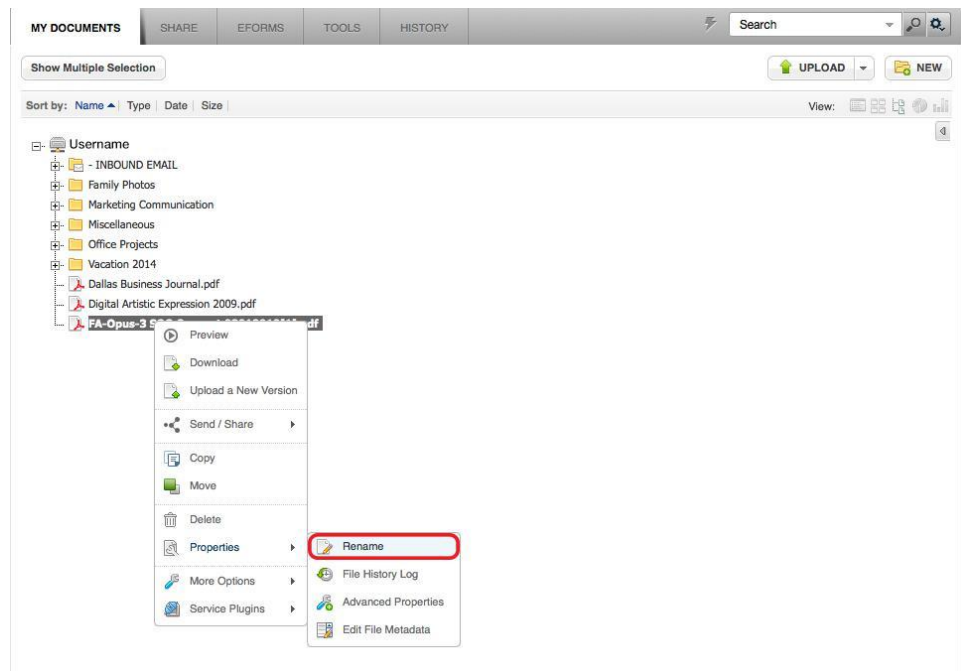
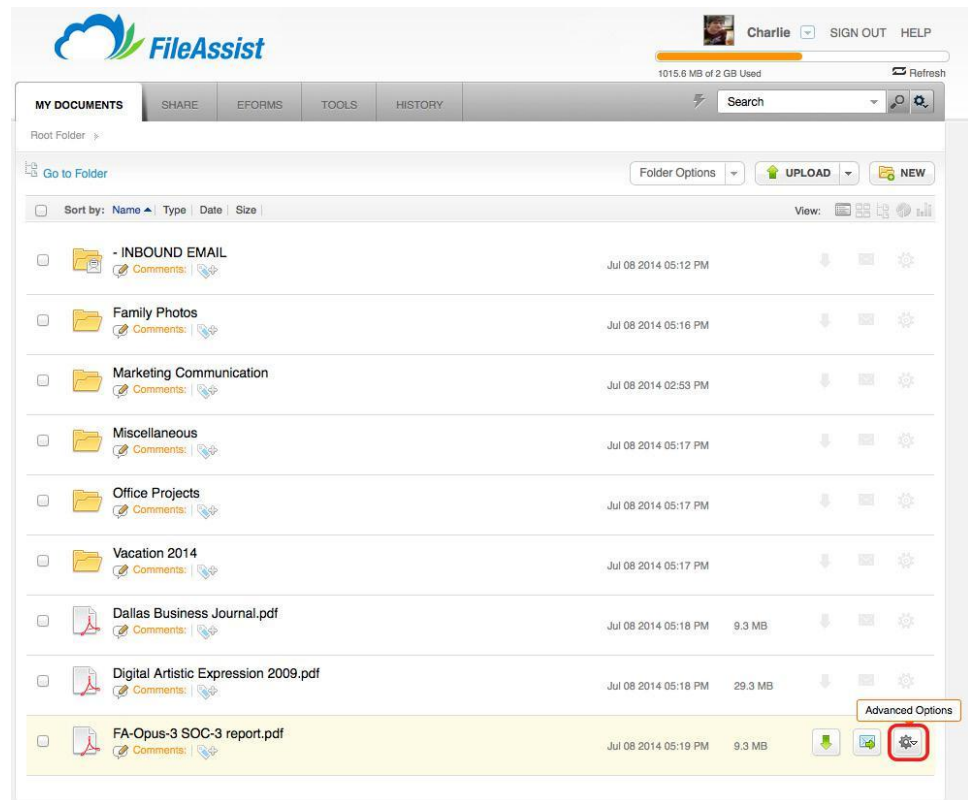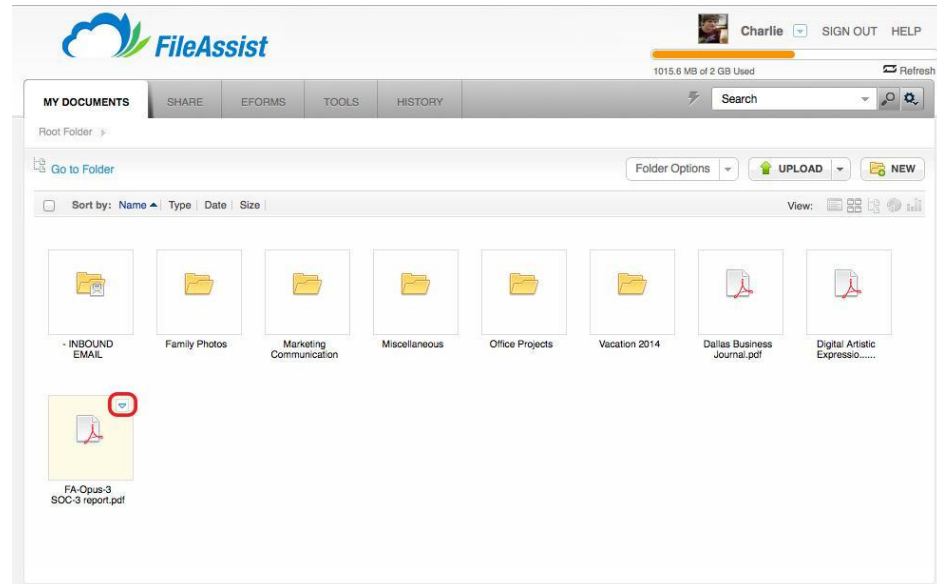**2.** You will be prompted to enter the new file or folder name, then click the **OK button.**

NOTE: Be sure to keep the file extension in the file name (e.g., .jpg, .doc, .xls, etc.). The system will allow you to save a file without the extension, but this could lead to future issues. It's best to always include the file extension.

3. Your folder tree will automatically refresh showing the new file or folder name.

In List View:

1. Move your mouse over the file or folder you wish to rename and **click the Gear icon** on the far right.

2. Choose **Properties** and then **Rename.**
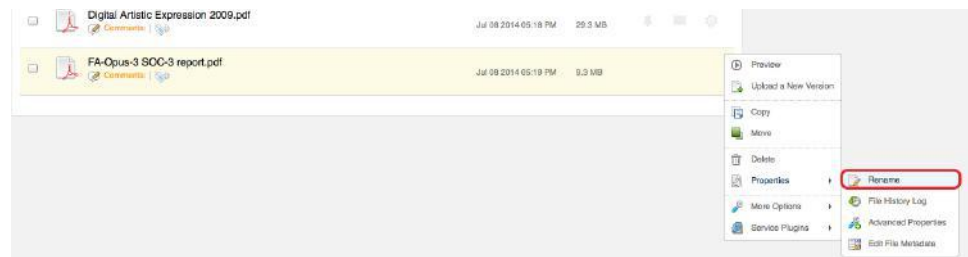
3. You will be prompted to enter the new file or folder name, **then click the OK button.**

In Icon View:

1. Move your mouse over the file or folder you wish to rename and **click the small arrow in the top right had corner of the icon.**

2. Choose **Properties** and then **Rename.**
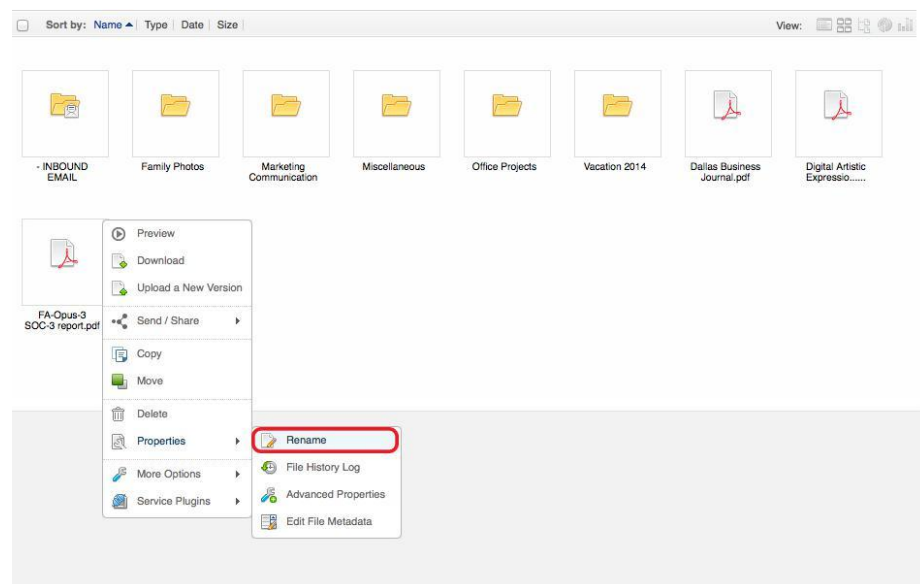
3. You will be prompted to enter the new file or folder name, **then click the OK button.**

IMPORTANT INFORMATION ABOUT RENAMING FILES AND FOLDERS

- **GroupShare™** users with full access are able to rename files and folders.

- Certain characters are not supported in the remote file or folder name **(such as ! or %).**
  It's best to use only alphanumeric characters in your file and folder names.

vi. Selecting Multiple Files and Folders

While working in your FileAssist account you may need to select more than one file at a time. This can prove useful if you need to move, delete or share multiple files at once. To select multiple files or folders, follow the steps below.

Tree View

1. Click the Show Multiple Selection button near the top left of the page. This is directly underneath the **My Documents tab.**
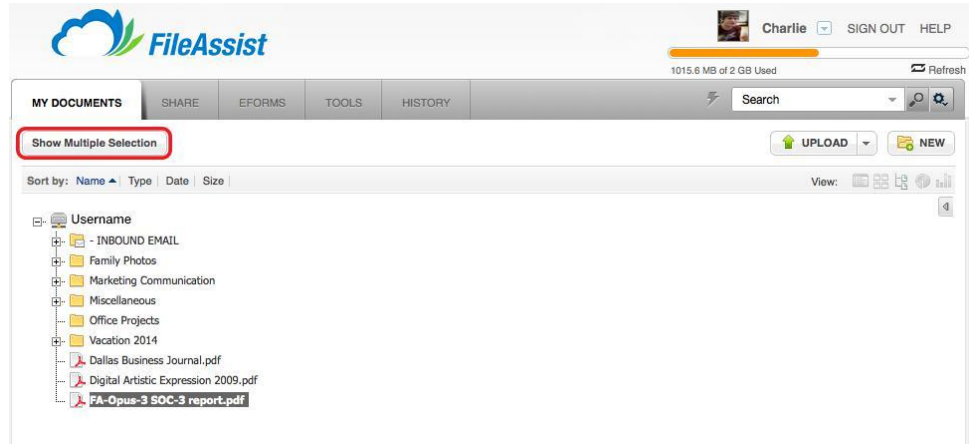
2. Once that button has been clicked the page will reload and all of your files and folders will have a **checkbox** next to them.
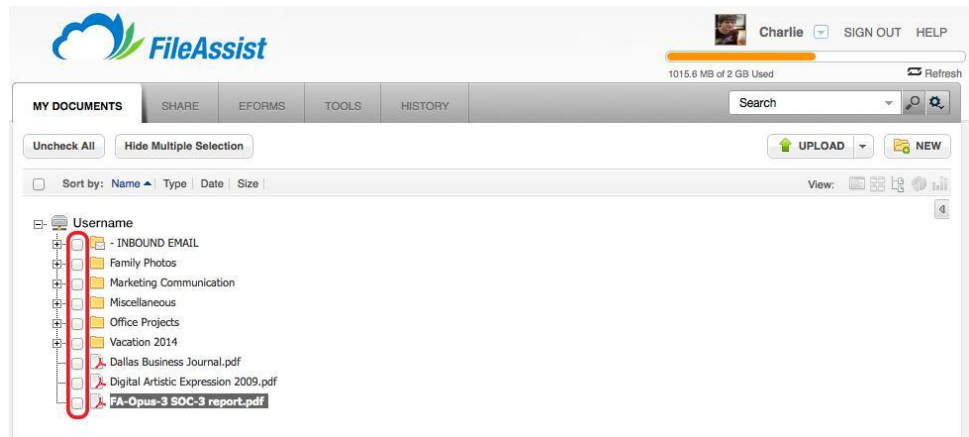
3. After checking two or more of those boxes a blue toolbar will appear across the top of the page. This toolbar will have several options including **Move, Delete, Share** and **Download.**
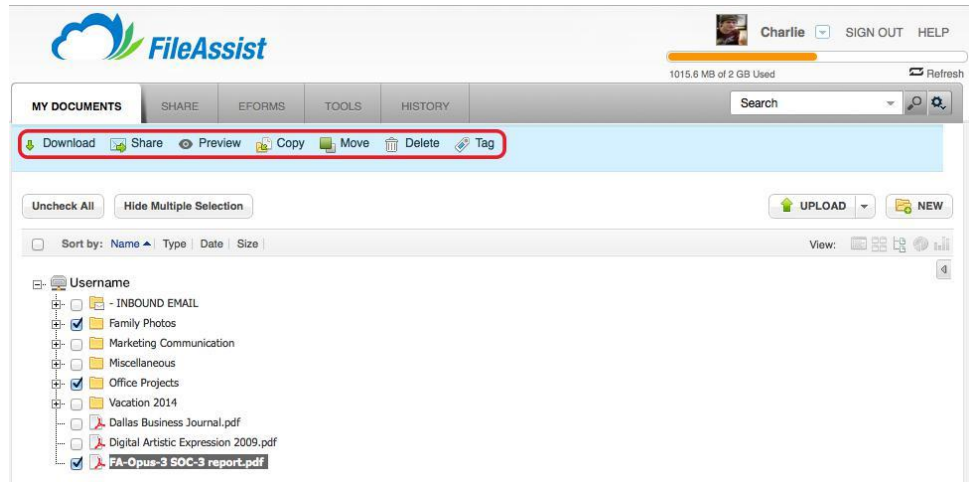
4. Once the appropriate action has been selected it will apply to all of the selected files and folders.

In **List View** the steps are identical. The only difference is that the checkboxes are already there.
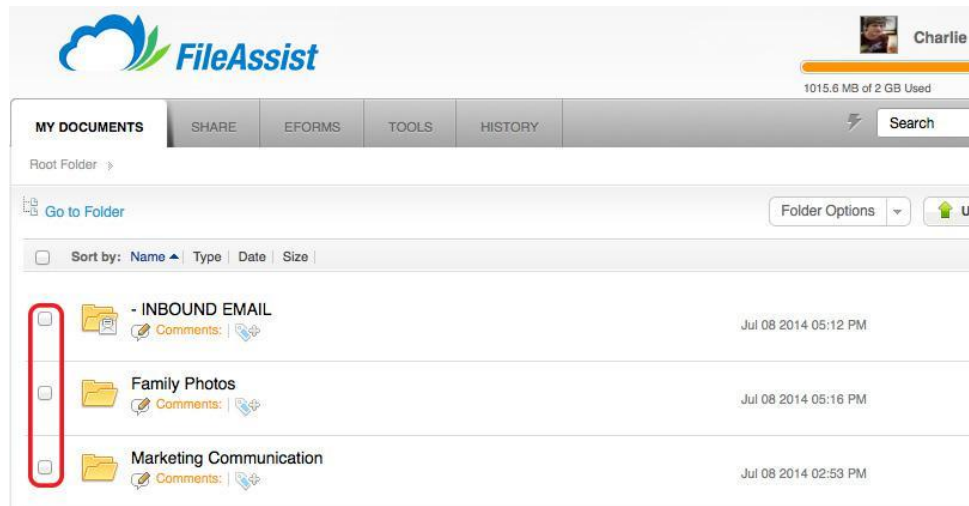
vii. Copying Files and Folders

In List View:

1. Hover over the file or folder you wish to copy and click the **Gear icon.**
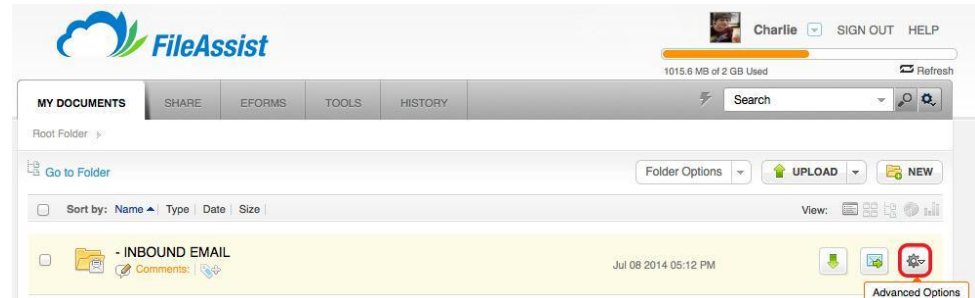
2. Choose Copy.
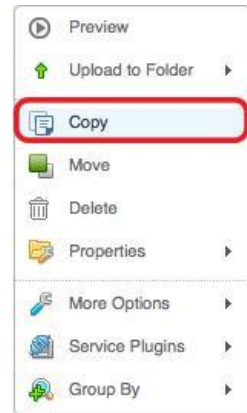
3. Choose an existing folder or **create a new folder** that you wish to copy the file to, **then name the copy.**

4. Click Copy.
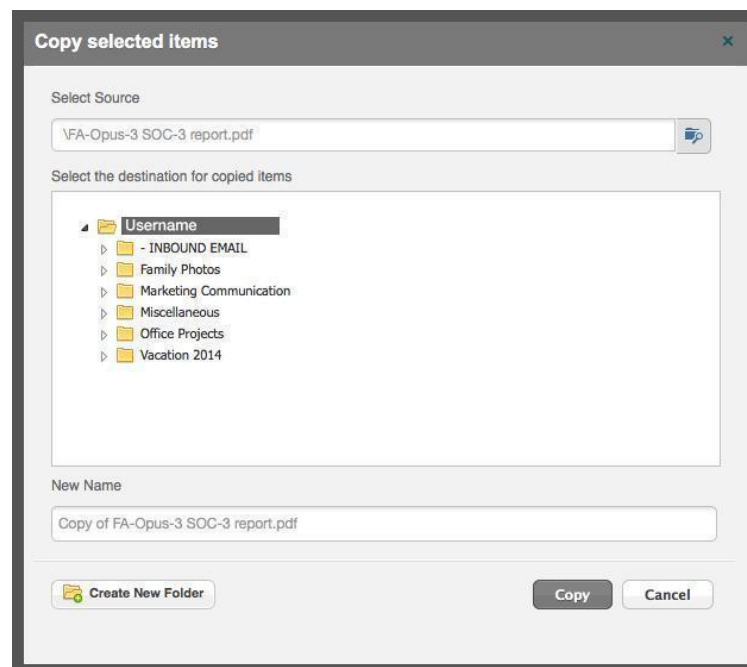
In Tree View

1. Select the file or folder by right clicking, **then select Copy.**
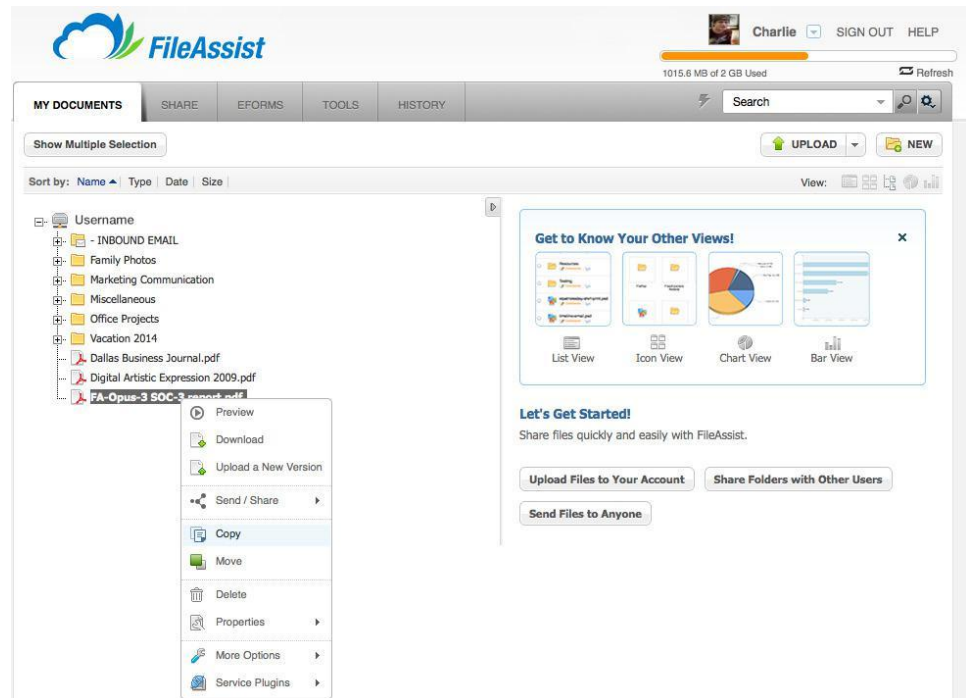
2. You will be **prompted for the new destination for the copied file/folder,** as well as a name for the copy.

3. Click Copy.
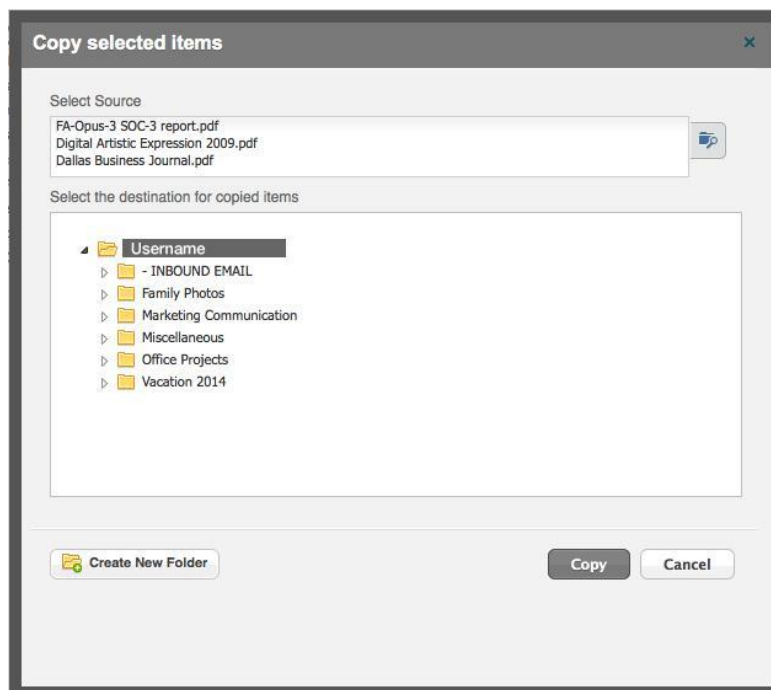
In Icon View:

1. Move your mouse over the file or folder icon and **click the small arrow in the top right corner of the icon.**

2. Choose Copy.
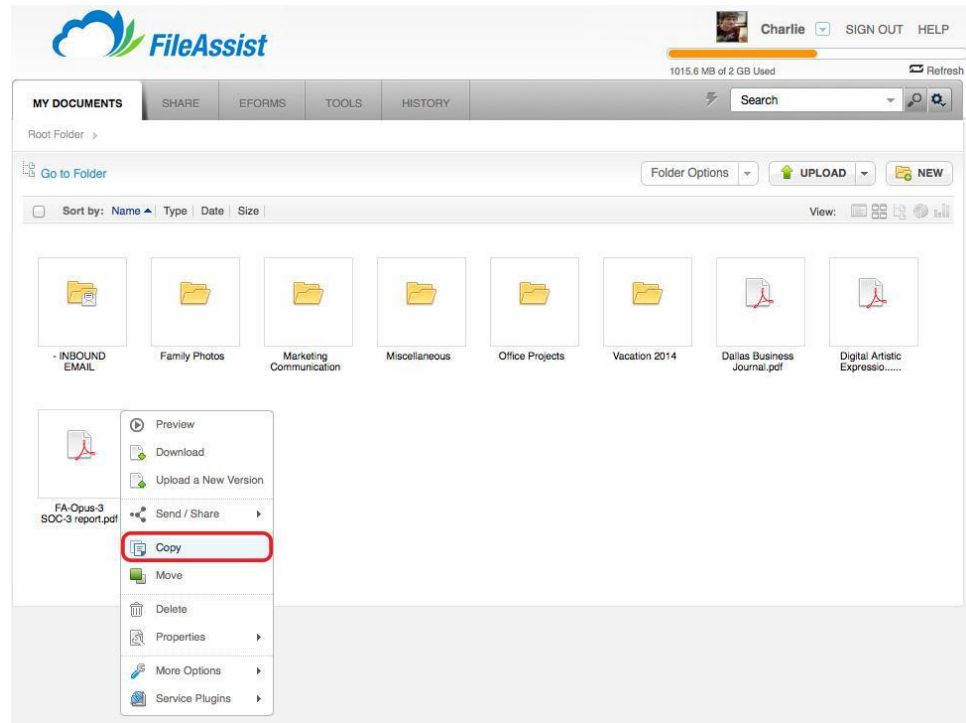
3. You will be **prompted for the new destination for the copied file/folder,** as well as a name for the copy.

4. Click Copy.
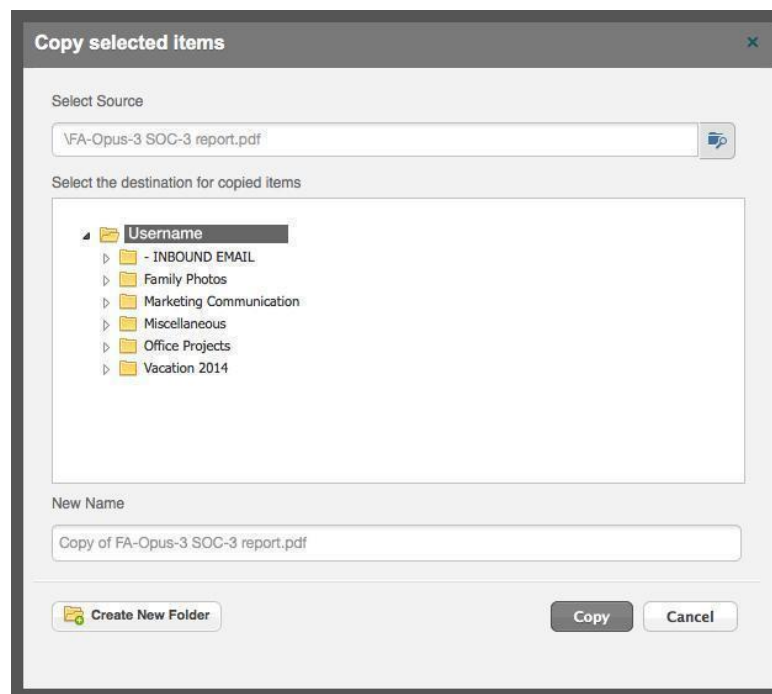
Copying Multiple Files

1. In **Tree View click the Show Multiple Selection button** underneath the **My Documents tab.**
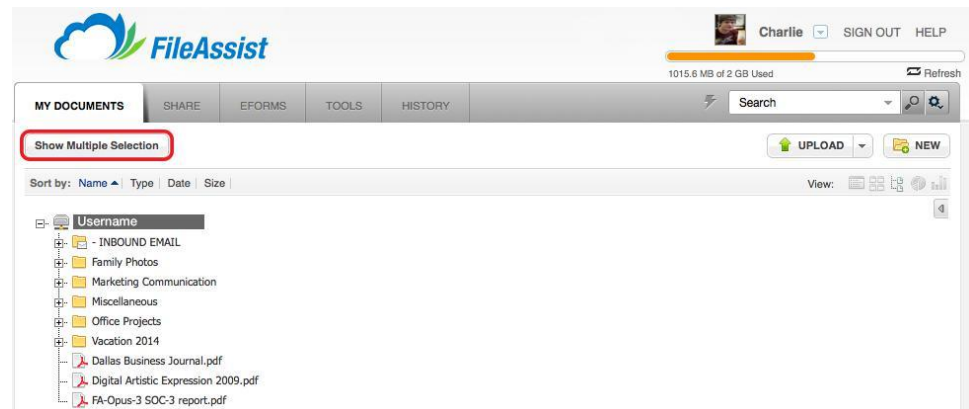
2. The tree will reload with checkboxes to the right of all files and folders.

3. Upon selecting more than one of these checkboxes, **a blue toolbar will appear with several options.**
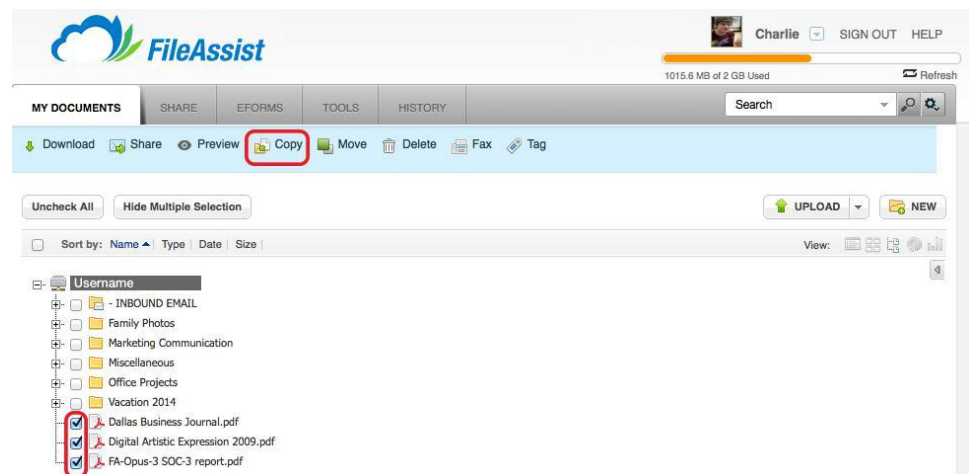
4. Choose Copy.

5. Select a Destination for the files and **choose Copy.**
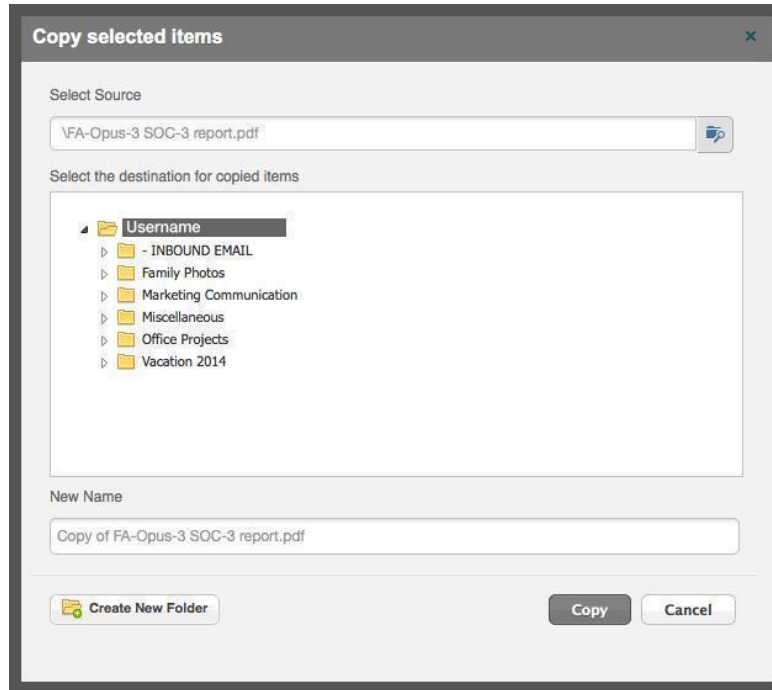
6. In **List View** and **Icon View** the checkboxes are already next to each file and folder.

viii. Downloading Files and Folders

NOTE: In most cases, you can download an individual file simply by **double clicking the file icon.** However, there are many different ways you can download files and folders from your FileAssist account.

Downloading Files and Folders in List View

Move your mouse over the file or **folder** that you wish to download and **click the green Download Arrow.** This will download the file or folder to your computer.
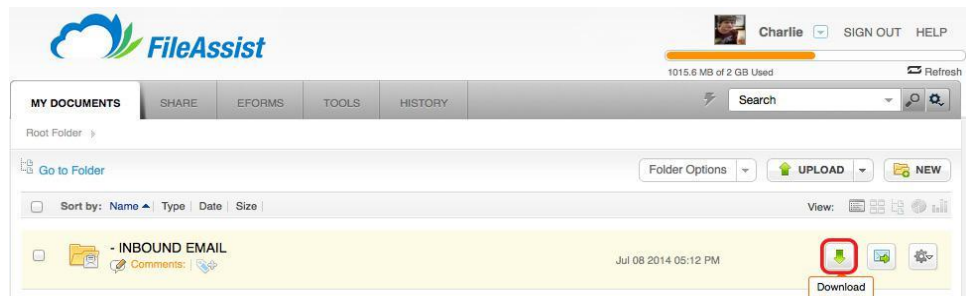
You can also download the contents of the folder you are in by **clicking the Folder Options button near the top right of the screen** and **choosing Download Folder.**
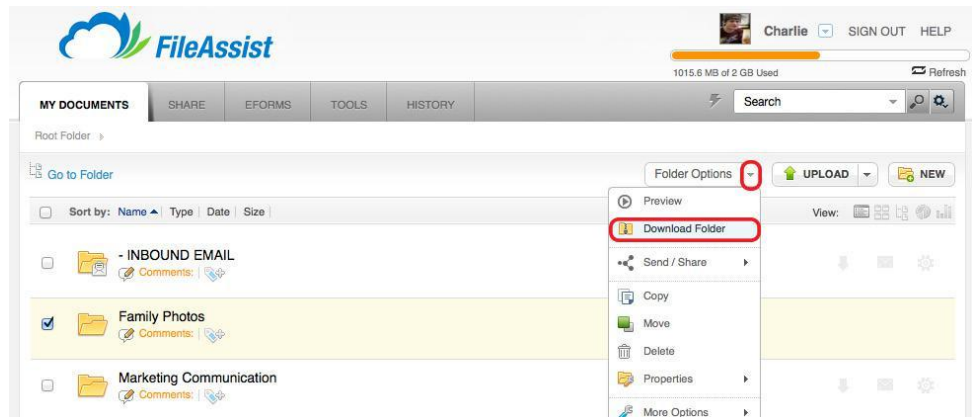
Downloading Files and Folders in Tree View

Right click on the file or **folder** that you wish to download and **click Download Folder.** This will download the file or folder to your computer.
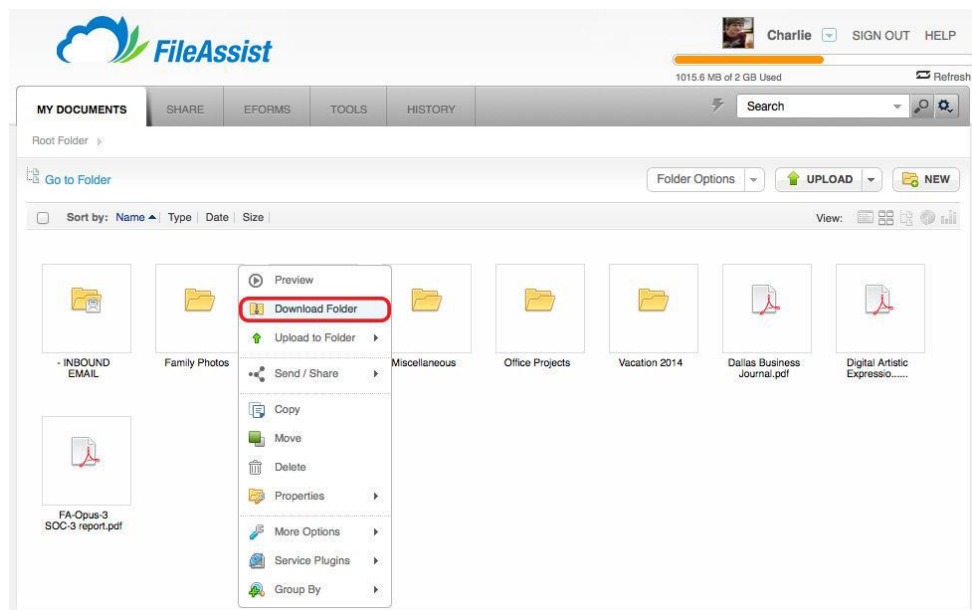
Downloading Files and Folders in Icon View

Move your mouse over the file that you wish to download and **click the small arrow in the top right hand corner of the icon.**
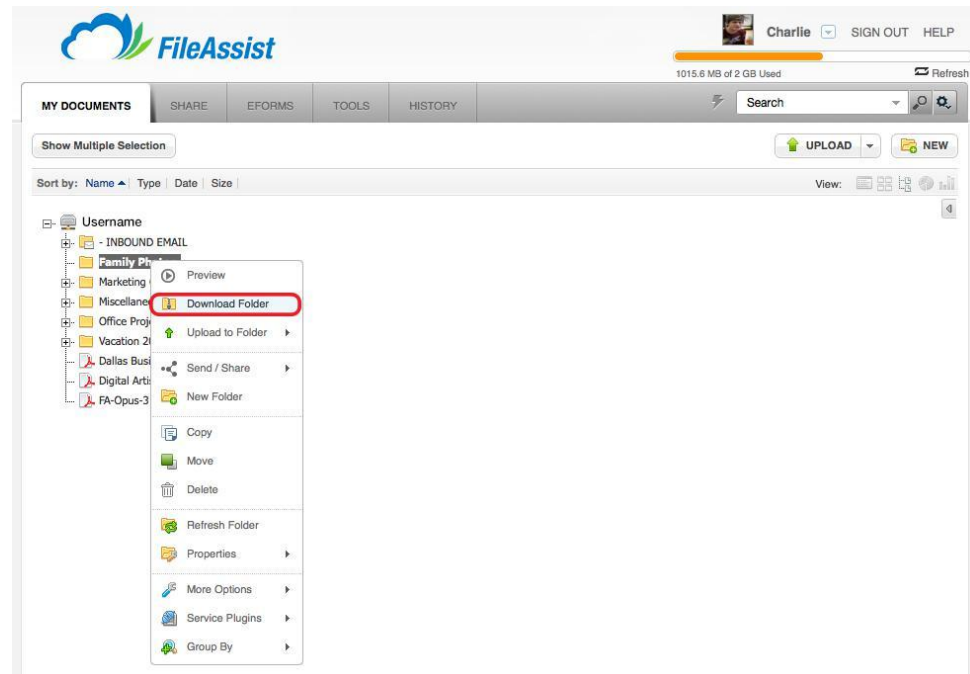
Choose Download or **Download Folder** (Depending on whether you are downloading an individual file or an entire folder).

IMPORTANT INFORMATION ABOUT DOWNLOADING FILES AND FOLDERS

- If after downloading a file, you alter the file and need to save the new version to your FileAssist account, the file cannot be saved back to your remote drive from inside the application. To update the version on your FileAssist account, you need to save it first locally and then upload the file to your account (you may overwrite the existing file or save it using a different name).

- The time needed to finish the transfer is completely dependent on your bandwidth to the Internet and the level of server activity. Because our remote server has an extremely high-capacity connection to the Internet, transfer rates will not normally be affected by other users. For cable modem, DSL, or other broadband users, downloading a 1 MB file will typically take 10 seconds or less. If you are using a modem, please be extremely patient since file transfers can take a long time over slow connections.

- Folder downloads (zipped downloads) are limited to 25 GB. You may use an FTP client to download folders larger than 25 GB.

ix. Deleting Files and Folders

Do you need to delete a file or folder? There are a few ways to accomplish this action and you'll find a discussion of each method in this article.

start

Let's Get Started:

There are 3 different views that you can cycle between for deleting documents **List, Icon** and **Tree.**

Deleting Files and Folders in Tree View

1. Login to your FileAssist account.

2. Locate the file or **folder** you wish to delete and **right click it to pull up the drop-down menu.**

3. Select Delete from the drop-down menu.
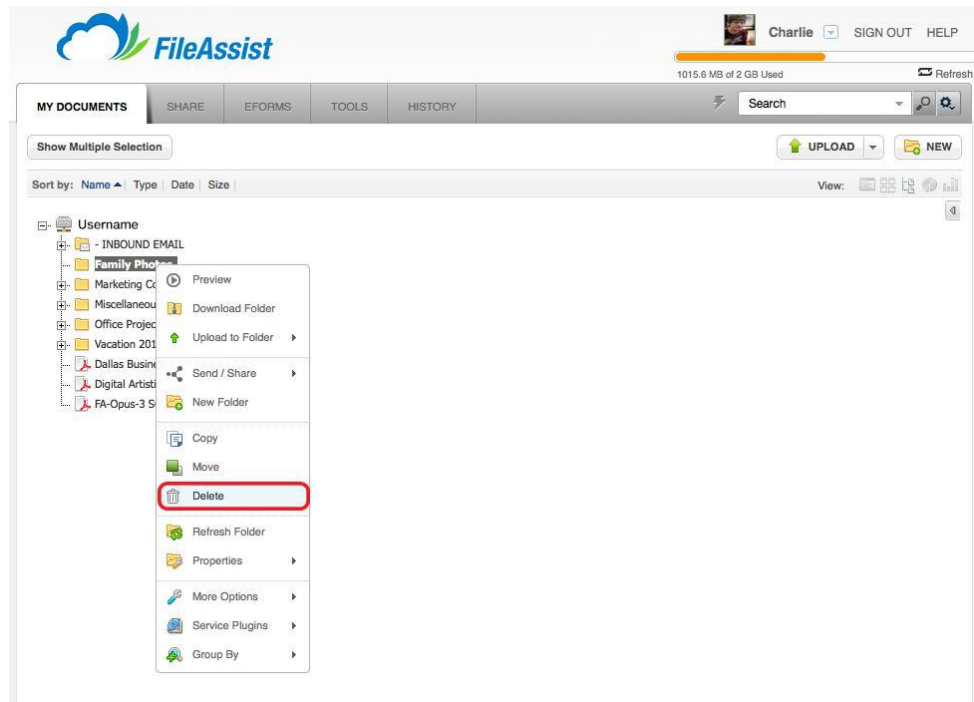
4. After a deletion, your account will refresh which automatically removes the deleted files/folders from your tree. You may also **click the Refresh button** on your browser to manually refresh your FileAssist content.

Delete Multiple Files and Folders in Tree View

If you need to delete multiple files from a folder, but not the entire folder itself, you can use the **Select Multiple feature.**

1. Login to your FileAssist account.

2. Select Show Multiple Selection above the **Sort by Function.** This will bring up checkboxes next to all the files/folders in tree view.

3. Once you **check two** or **more files/folders** a menu will appear at the top of the page.

4. Select Delete from the menu option.
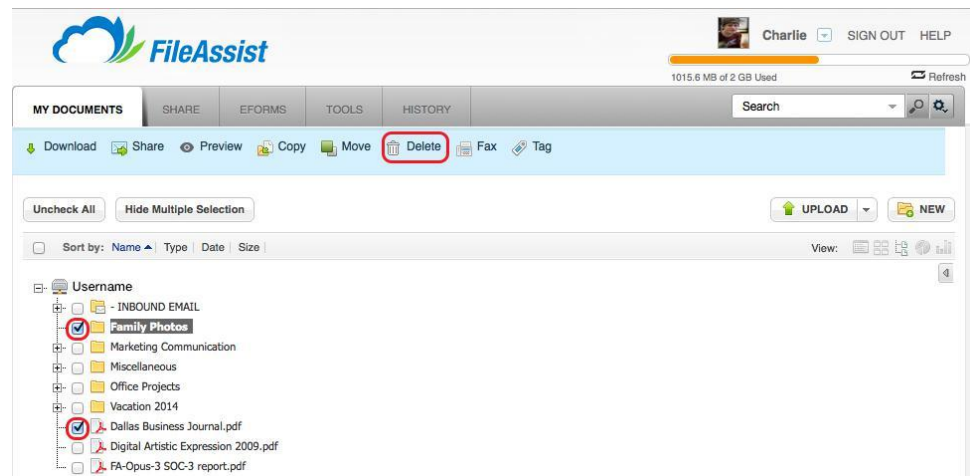
5. Your account will refresh automatically removing the deleted files/folders from your tree. You may also click the **Refresh button** on your browser to manually refresh your file content.

Delete Files and Folders in List View

1. Login to your FileAssist account.

2. Click the down arrow under Advance Options and a menu will appear.
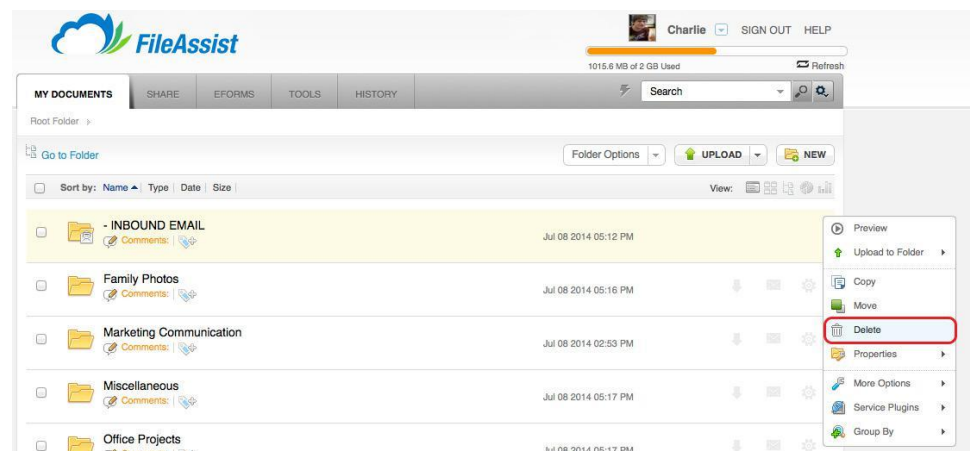
3. Select Delete from the menu option.

4. Your account will refresh automatically removing the deleted files/folders from your tree. You may also **click the Refresh button** on your browser to manually refresh your FileAssist content.

Delete Files and Folders in Icon View

1. Login to your FileAssist account.

2. Click the down arrow located in the top right corner of the File/Folder and a menu will appear.
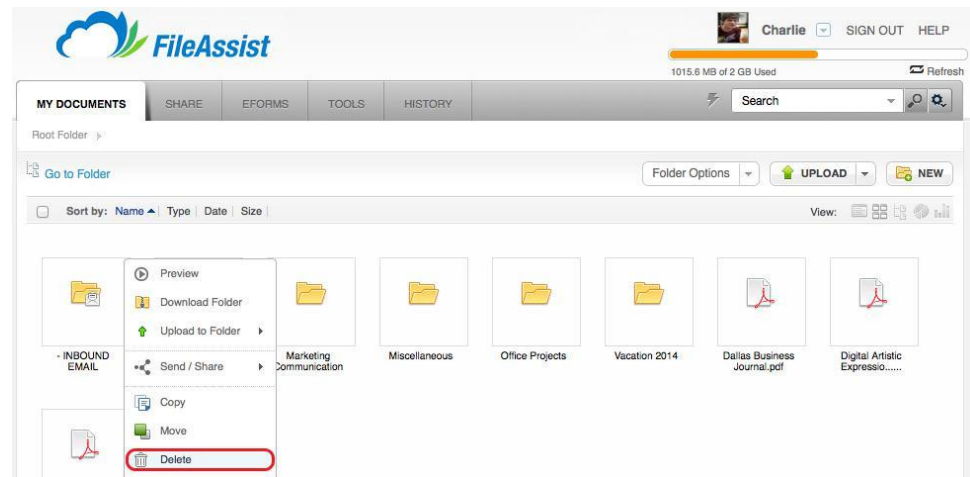
3. Select Delete from the menu.

4. Your account will refresh automatically removing the deleted files/folders from your tree.
You may also click the **Refresh button** on your browser to manually refresh your FileAssist content.
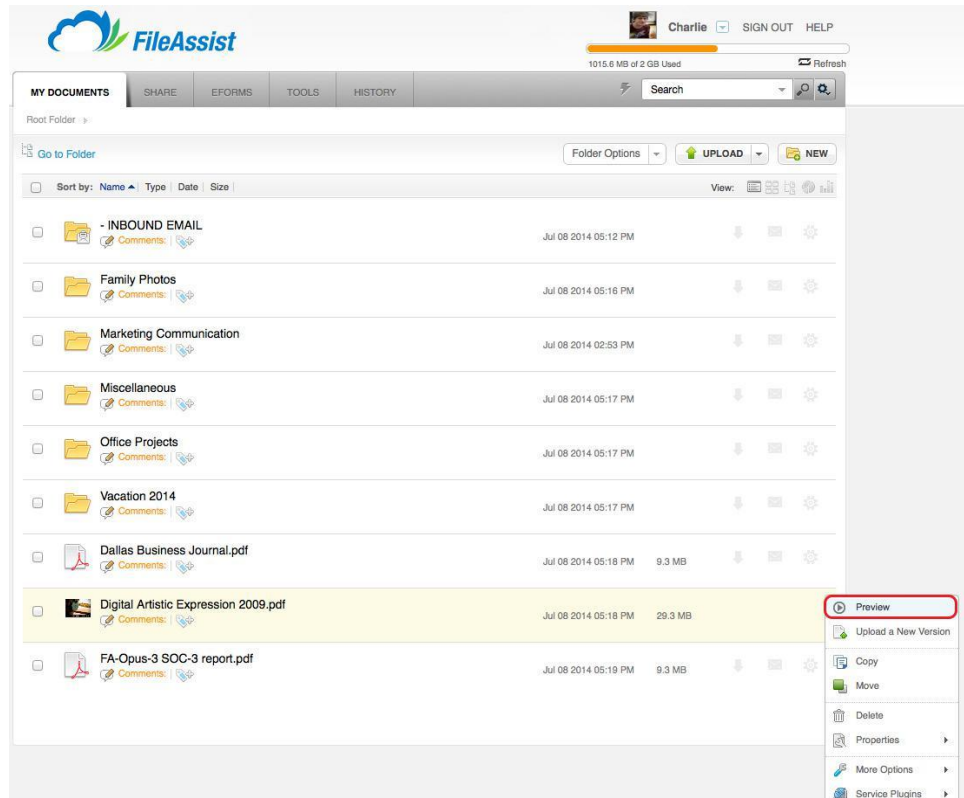
IMPORTANT INFORMATION ABOUT DELETING FILES AND FOLDERS

• Please be cautious when deleting files and folders from your account. All deleted data is permanently removed from your account.

• Each day at 11:00PM MST, FileAssist creates a snapshot of your account and retains the data for 30 days. Documents deleted accidentally may be restored if the file was not created and then deleted after 11:00PM MST. See the Restoring Data article for instructions on retrieving deleted files and folders.

x. Previewing Files and Folders

FileAssist's Preview feature allows user and recipients of **FileShare Links** to view documents, videos, listen to songs and see the contents of folders. Previewing a folder is as simple as selecting the folder, opening the options and selecting preview. The Preview mode displays options on the right hand side and allows the user to navigate between multiple files. An image of the feature is directly below and instructions to Preview a file or folder are below the Preview example.

In **Tree View right click on a folder** or **file** and **click Preview.**
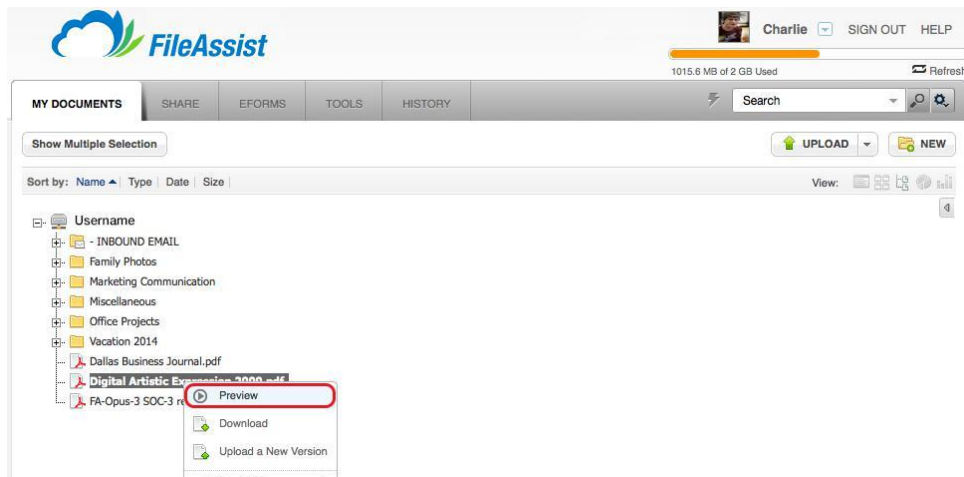
In **List View click the Cogwheel icon** on the far right side.
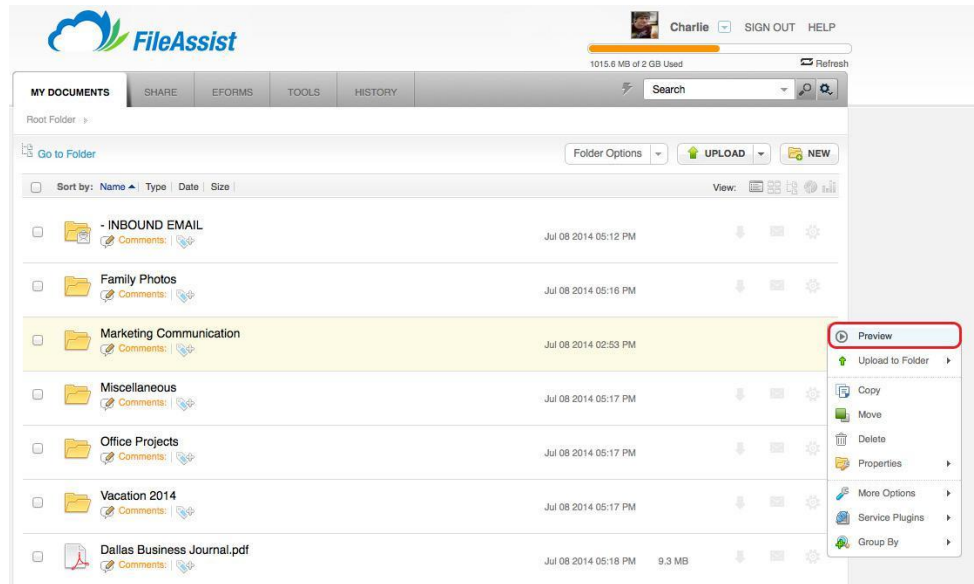
In **Icon View click on the down arrow icon** in the top right corner of the file or folder icon and **then click Preview.**
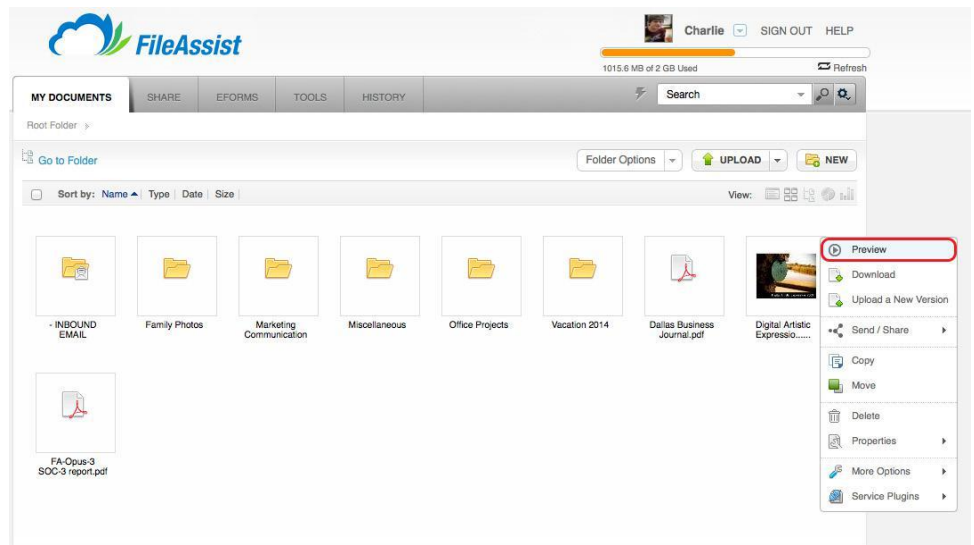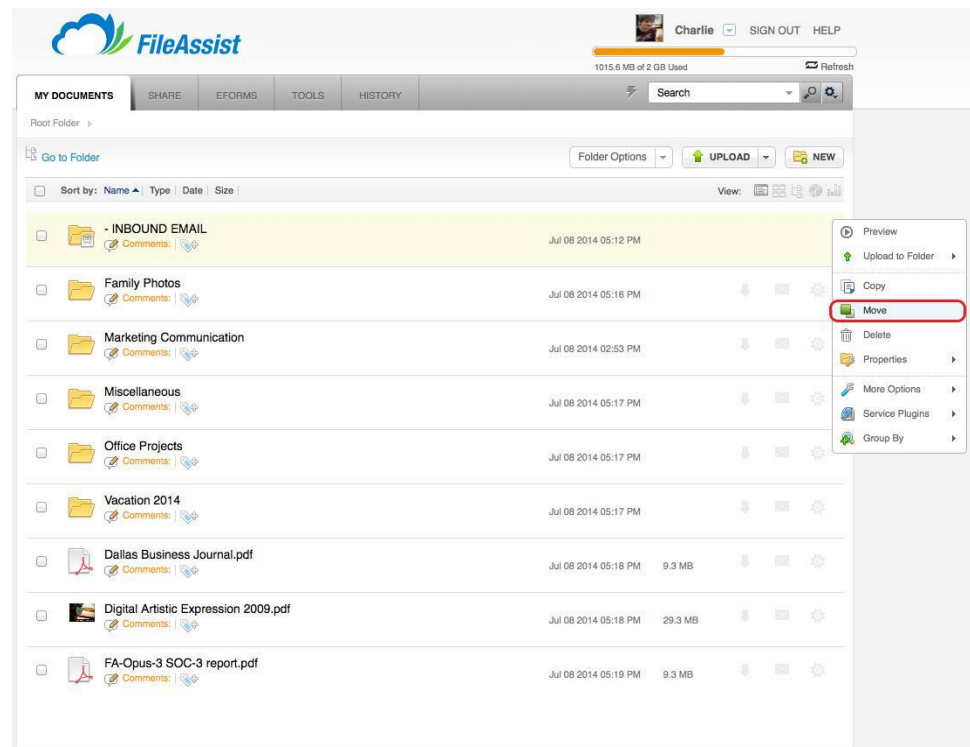
xi. Moving Files and Folders

Organization is an important part of FileAssist. If you accidentally upload a file or folder to the wrong location, or you need to move something to another directory, we make it easy for you. There's a few ways to move your files and folders and they're all listed below.

Move Command

To move folders and files in **List, Icon** and **Tree View, select Options** (usually a **Gear icon**) and **then click Move. Then select the destination** and the file will relocate itself. That's it!

List View

Tree View

Check the files you want to move.
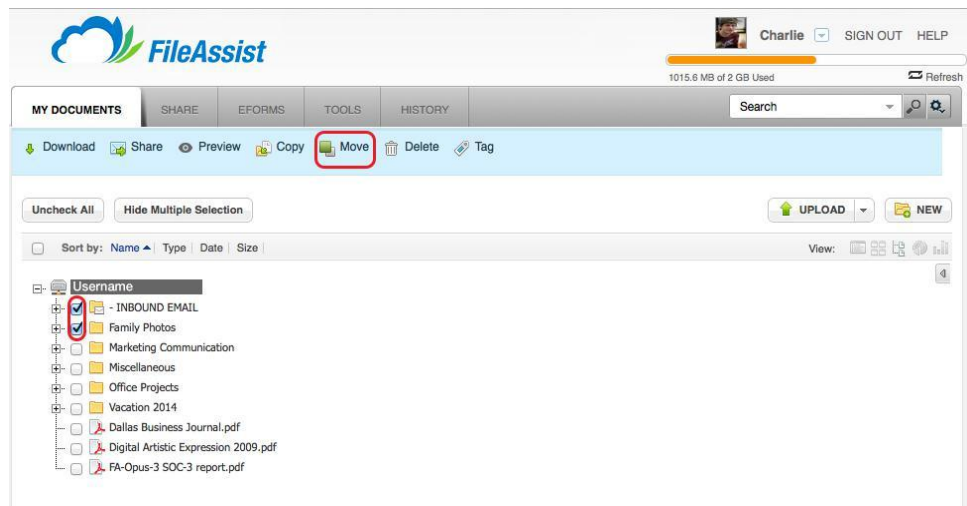
OR

Right click and **select Move.**
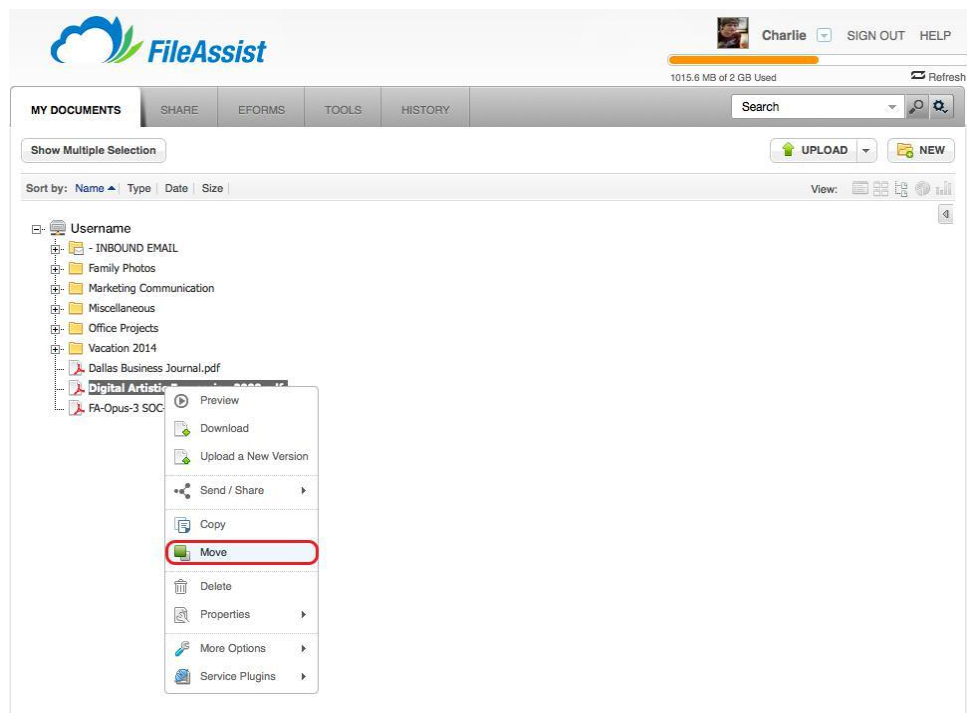
Icon View
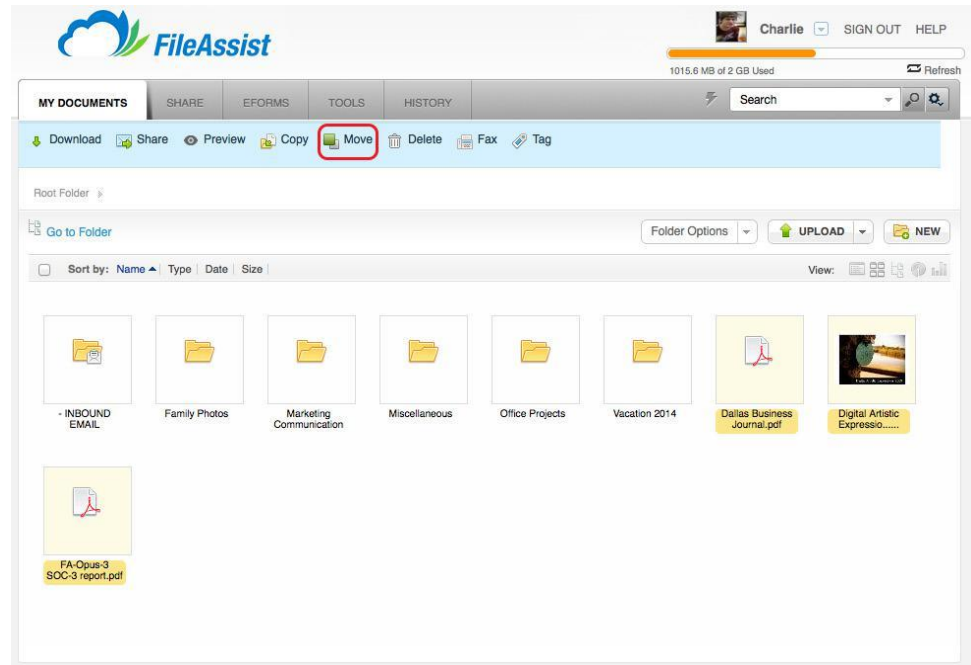
Move Command Window
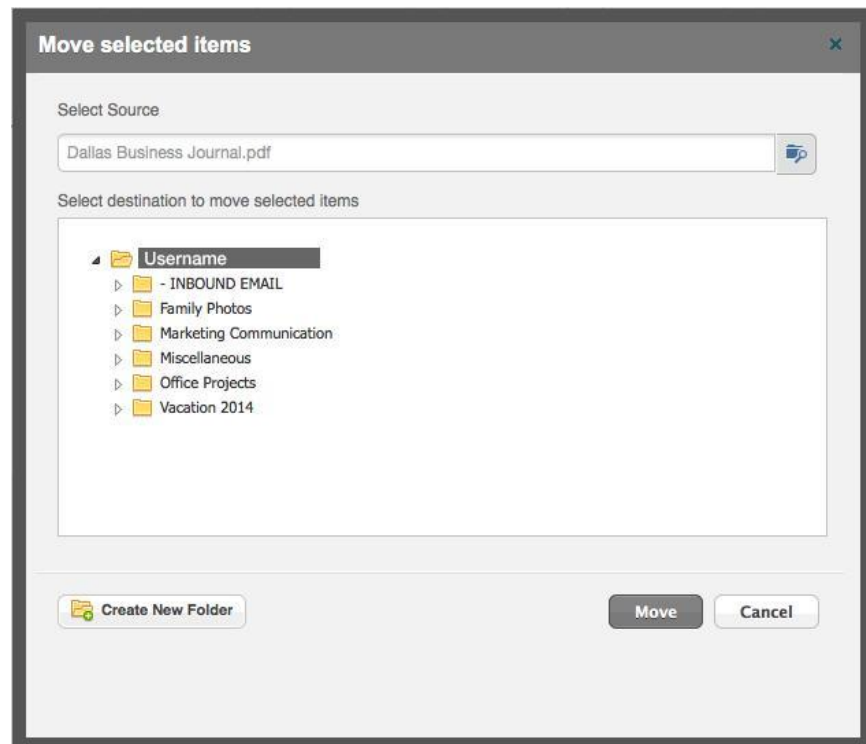
Dragging and Dropping

Click and hold a file/folder and **drag it onto another folder.** This feature works in the **List View** and **Tree View.**

List View

Tree View
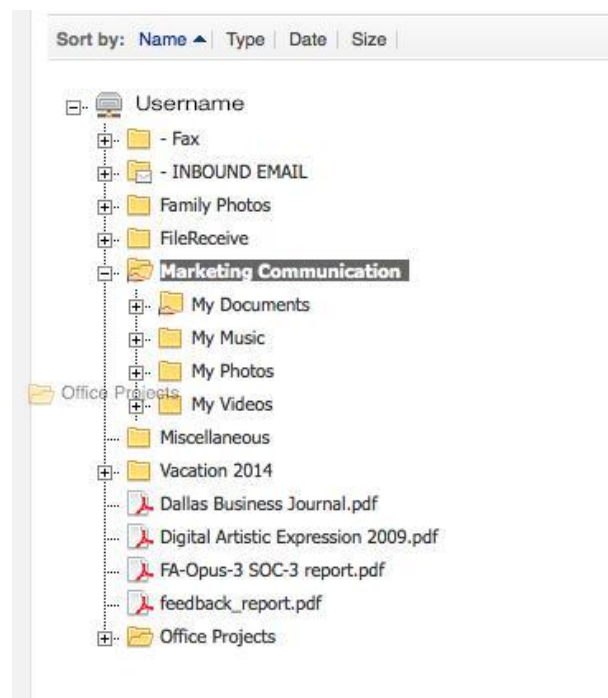
xii. Folder Properties

We live in a world full of information. Wouldn't it be nice if it was centrally located and easy to find? For FileAssist users, it is! The Folder Properties screen provides all the important details of the selected folder so that you can review it at a glance and manage your data with a few clicks. The Folder Properties screen contains six tabs: **General, File Tracking, Email Options, Sharing, File Lifecycle** and **Activity History Log.** Here we've provided an overview of how to access Folder Properties and the features available in each tab. If you would like step-by-step instructions for changing properties and settings contained within the Account Settings screen, you may choose one of the following tutorials:

- File History Log
- File Lifecycle
- **GroupShare™**
- Upgrading Your Account
- Version Control

To access Folder Properties **click the Gear icon** next to the folder you wish to review, or **right click the folder** in **Tree View, select Properties** and **then Advanced Properties.**
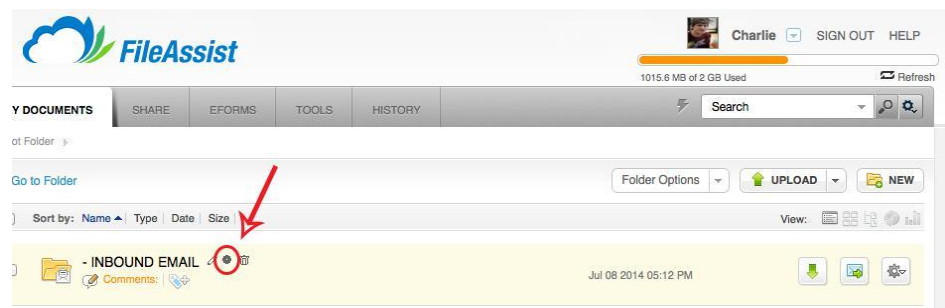
From here you will have access to the **Folder Properties window.**

General Tab
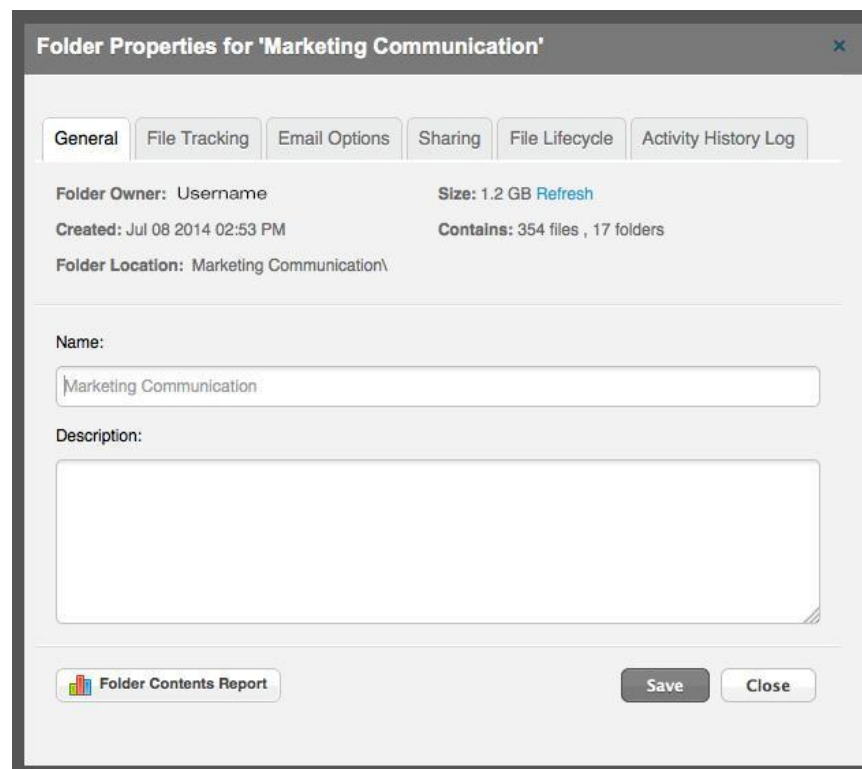
Fields within the General Tab

- **Folder Owner** – Name of the user or subuser with ownership of the selected folder.

- **Size** – Displays the combined size of all files in selected folder, including all subfolders.

- **Created** – Displays the date the folder was created.

- **Contains** – Displays the combined number of all files in selected folder, including all subfolders.

- **Folder Location** – Displays the complete file path of selected folder.

- **Name** – Displays name of selected folder. Also allows user to change name of selected folder.

- **Description** – Allows user to input a description of selected folder.
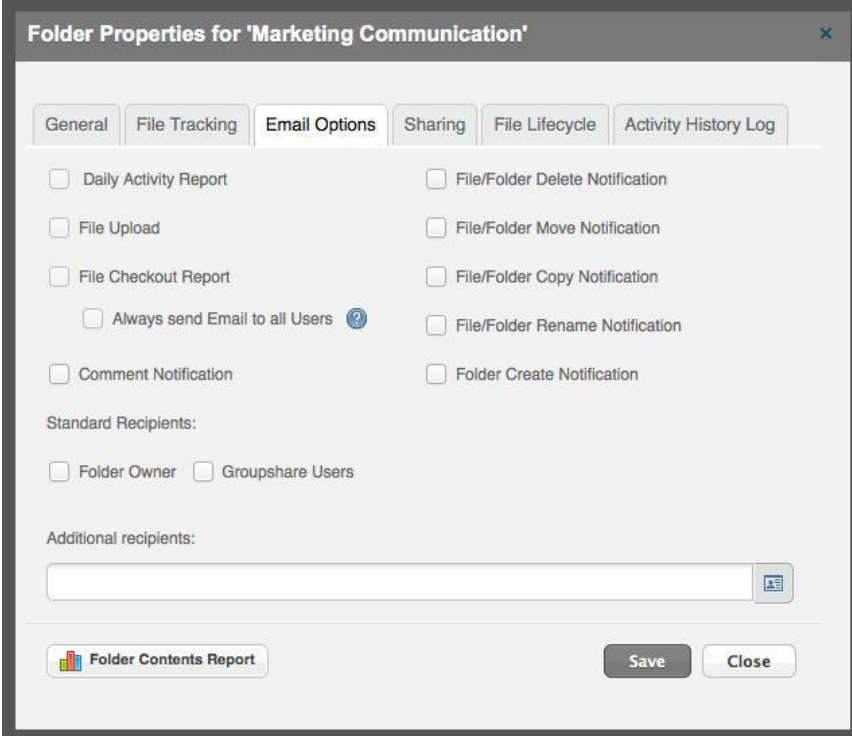
File Tracking Tab
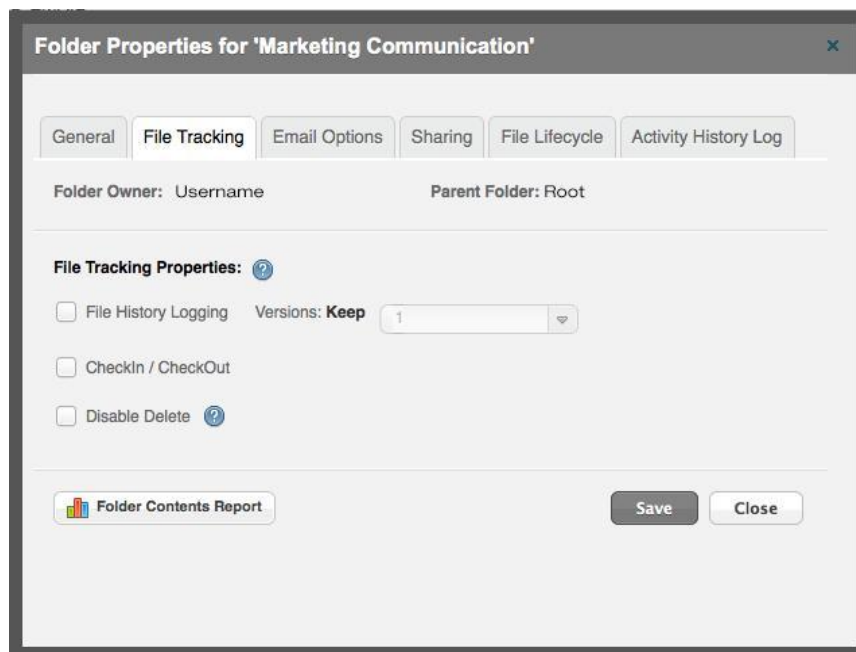
Fields within the File Tracking Tab

• **Folder Owner** – Name of the user or sub user with ownership of selected folder.

• **Parent Folder** – Shows the path of the parent folder from which properties of the selected folder are inherited.

• **File History Logging Checkbox** – Enables/disables File History. With File History enabled, a backup copy of every file version uploaded to the selected folder (and subfolders inheriting properties from the selected folder) is stored in the folder owner's Version History Repository folder.

• **Versions** – When File History Logging is enabled, you can set the number of versions the system will retain as backup for each file. If you only want to use the File History Log feature without retaining any backup versions, select 0 (zero) from the Keep drop-down menu. Data Restore feature that takes a snapshot of every account at 11:00PM MST and keeps those snapshots up to 30 days, including the number of file versions you have chosen to keep.

• **Checkin and Checkout Checkbox** – A **GroupShare™ feature,** this checkbox enables/disables the enforcement of Checkin/Checkout Version Control rules on the selected folder. With this feature enabled, all downloads and uploads are automatically tracked using Checkin/Checkout.

• **Disable Delete** – Completely disables all deletion capability within the selected folder and subfolders. When turned on in the parent (root) folder, prevents deletion of files in all folders associated with the account. This prevents accidental deletion for important files. This feature can be used with File History and Checkout for complete version protection.

Email Options Tab

Fields within Email Options Tab:

- **Daily Activity Report Checkbox** – Enables an emailed daily report displaying all file updates done during a 24-hour period.

- **File Upload Checkbox** – Enables a real-time email notification for every file upload. This feature is not recommended for large directories with high volume file activity since an email is generated with every file action.

- **File Checkout Report Checkbox** – Automatically email a notification of every file checkout at the time of the download.

- **Always Send Email to all Users Checkbox** – When enabled, all members of the **GroupShare™** for a selected folder will be included in email distributions.

- **Standard Recipients, Folder Owner Checkbox** – Enables the folder owner to receive the specified reports and notifications.

- **Standard Recipients, GroupShare™ Users Checkbox** – Enables **GroupShare™** participants to receive the specified reports and notifications.

- **Additional Recipients** – A free form field, you may specify other email addresses to be included in the distribution, even if they are not **GroupShare™** users. Any valid email address is acceptable. Separate multiple email aliases with semi-colons (e.g., user1@domain.com; user2@domain.com).
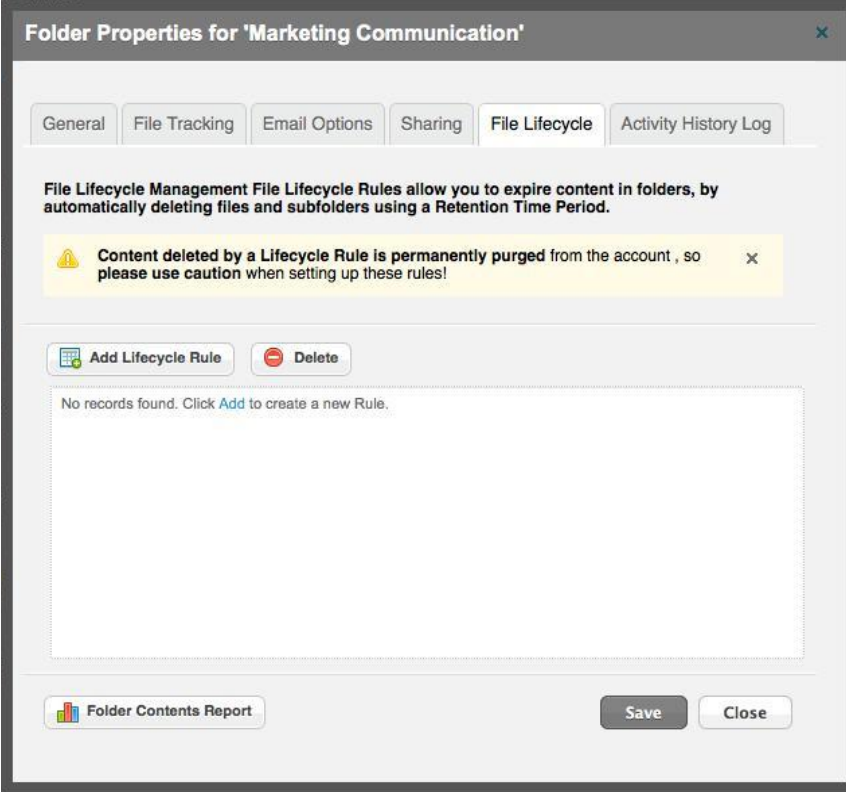
Sharing Tab
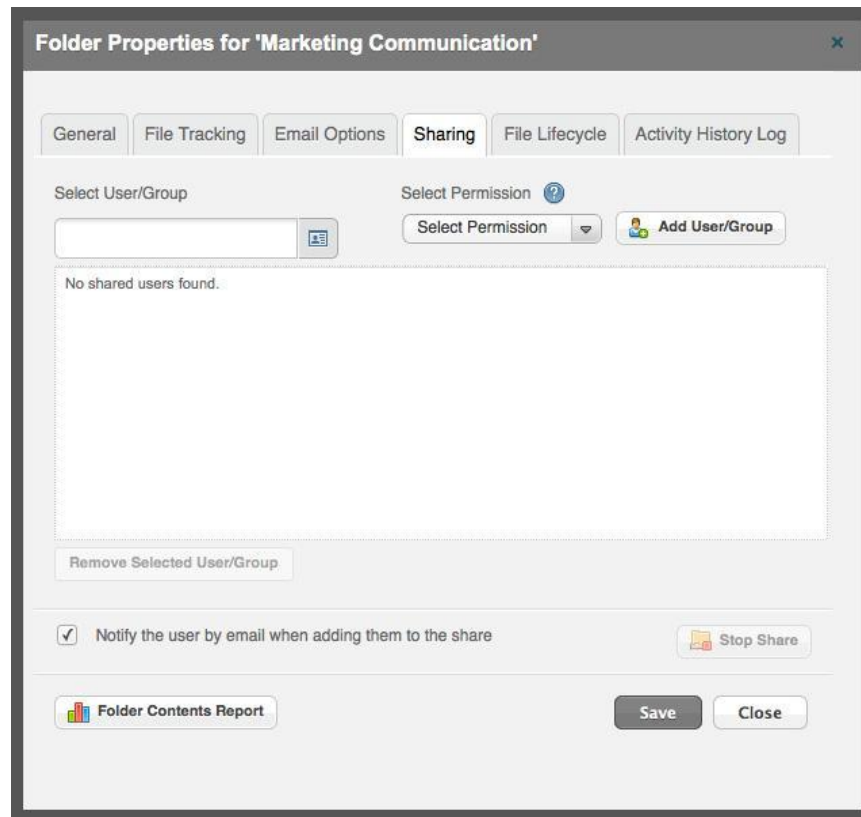
Fields within Sharing Tab:

- **Select User/Group** – Allows you to specify the user/group with whom the selected folder will be shared.

- **Select Permission** – Allows you to set the user/group permission level for the selected folder. Available settings are: Full Access, Create and Update, Read Only and Master Access.

- **Notify the User by Email Checkbox** – Enables the user/group to receive email notification when they added to share.

- **Stop Share** – This button will cease all sharing activities with this folder.

File Lifecycle Tab

- **Add Lifecycle Rule** – Allows user to add a rule set for life cycle of selected folder.
- **Delete** – Remove selected Lifecycle Rules.

NOTE: Adding a rule will enable the deletion of files/folder using a Retention Time Period.

Activity History Log

Fields within Activity History Log:

- **Choose Activity** – Allows user to select what activity is reported in the history log. Available options are: File History/Link Tracking, Checkin/Checkout History, Currently Check Out Files.

- **Folder** – Allows user to specify which folder will receive an Activity History Log.

- **Include All Subfolders Checkbox** – Enables the inclusion of all subfolders. Activity for subfolders will be include in history log.

xiii. Searching Files and Folders

Need to find a file with your account and can't remember exactly where it is? No problem! Use the search bar to instantly search files or folders through your entire account! An Index feature rapidly indexes all readable file content in the account, making word searches lightning-fast! You can create your own keywords and then tag files to easily search by keyword. Search by file or folder names, text in files, meta tags, or even comments.

start

Let's Get Started:

1. Login to your FileAssist account.

2. On the top right-hand side, **click on the Search box.**
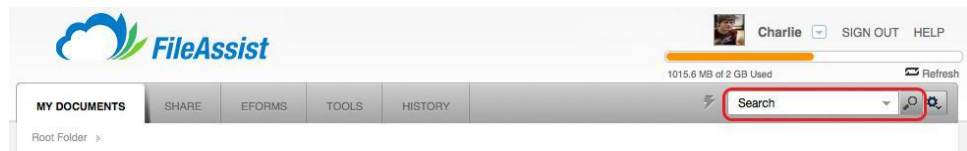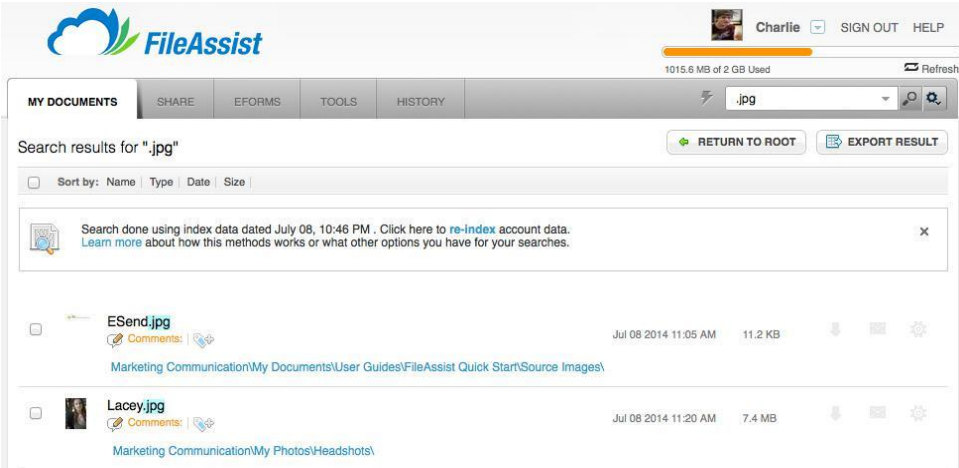
3. Type what you need to search for and **press Enter on your keyboard** or **click the Search button (magnifying glass)** on the right side of the search box.

4. To expand or close additional search options, **select the down arrow** to the right of the **Search button.**
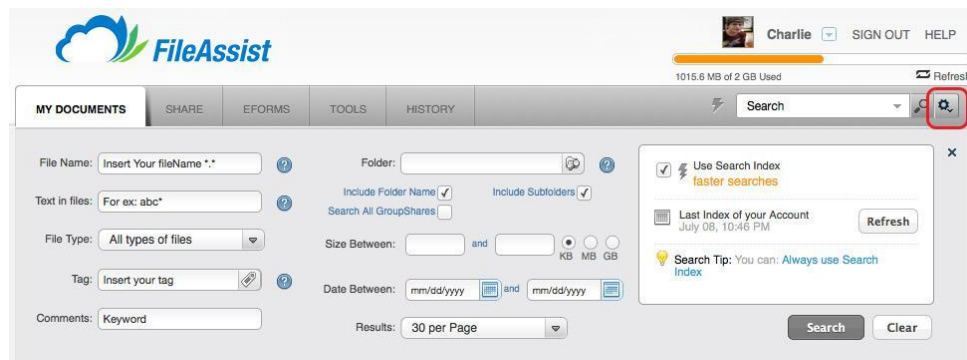
5. Enter your search criteria in the appropriate fields, **then click Search.**

NOTE: You may select a different folder to search in by clicking the **Browse** button. A * denotes a wildcard search, which means you may replace parts of your keyword with the asterisk to allow a full search (e.g., mark* as a search criteria will return all results within files or folders that contain the word mark, such as marketing, market, marksman, markup, etc.)

6. Files matching your search criteria will be returned in the bottom window. From here you may **export to an Excel** or **text file,** or **access** the selected files accordingly.

IMPORTANT INFORMATION REGARDING SEARCH

- The search feature is an intensive process on the server and for this reason we limit the time taken by this process to support a very large number of users accessing this feature. The search feature is extremely fast, so all practical searches can be performed within the time allowed.

- If you receive a Timeout error message, try limiting the folders you are searching, specify the file types (i.e.: *.doc), or try a more exact search phrase.

(i) Advanced Text Search

Search Text in File Commands

Search text in files is only available to Private sites.

- Phrase search: " "
  - E.g.: Fall 2007 Tax Records
- Multi character wildcard: *
  - E.g.: 2007 Tax*
- Single character wildcard: ?, ??, ???, etc.
  - E.g.: ?ame (this will search for Name, Fame, etc.)
- Boolean operators: AND, OR, NOT
  - E.g.: file AND storage AND NOT space
  - This e.g. searches for file text containing 'file' and 'storage' and doesn't contain 'space Advanced search features for File Name, Comment and Tag Search Available to all accounts.

(ii) How to Use Optical Character Recognition (OCR)

Optical character recognition is a powerful tool available to all Private Site clients. OCR, for short, processes the text in image files (.jpeg, .tiff, .bmp, .png, .raw) and PDFs, like bank statements, receipts, mail, or any other printed records.

When a document is uploaded the FileAssist OCR system will automatically index the file. The OCR technology also allows users to view the text in file directly in the FileAssist web interface, search text in file using the advanced search features, or even view the text in file.

Beyond the basic functionality provided by the OCR system, it also allows users to use the text in file search with Boolean operators, combinations and other key commands to better control searches. To learn more about Advanced Text Searches click here.

start

To Get Started Using These Features Follow the Steps Outlined Below:

1. Upload any files to user account. **Click on Advanced Options** of file. **Click on More Options** and **select View Text Inside File.**
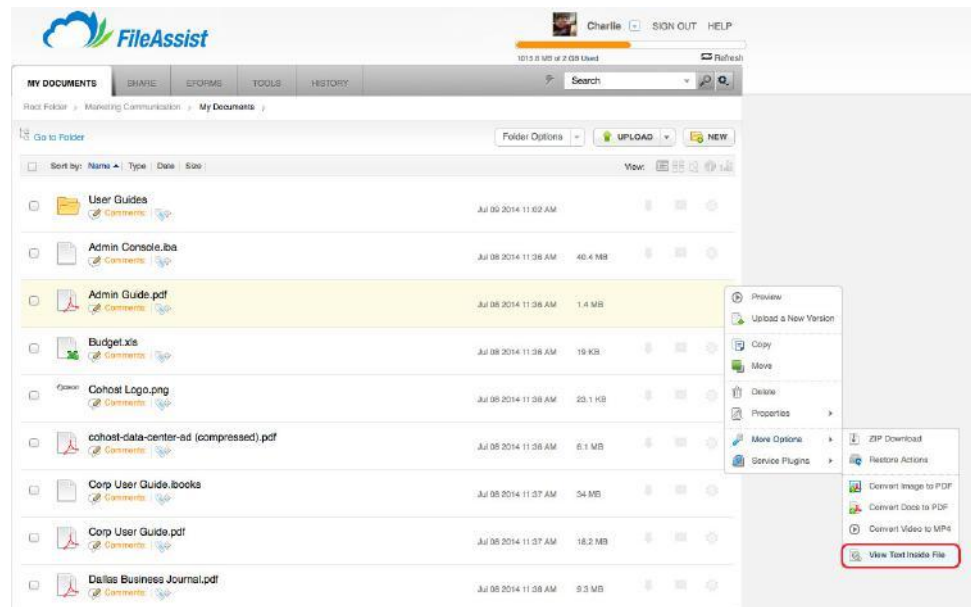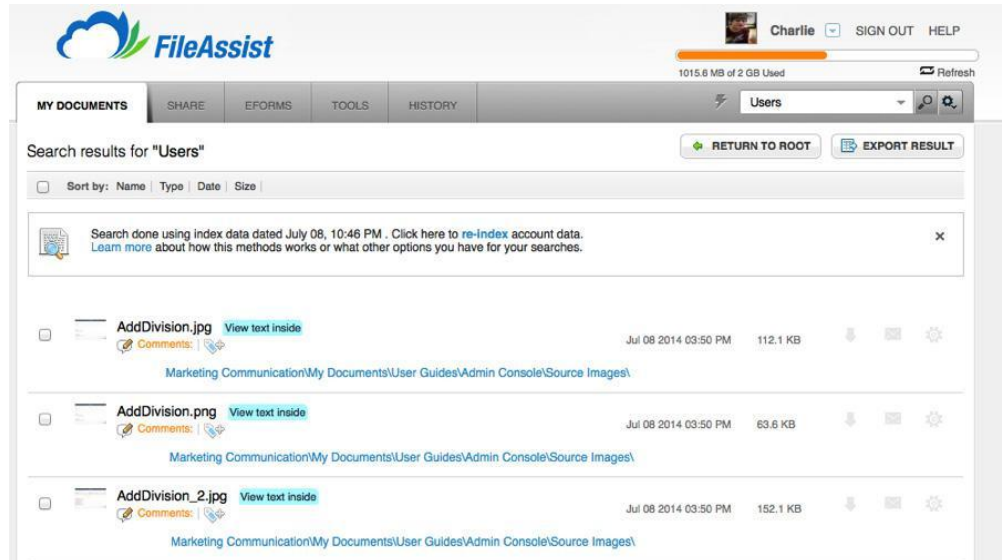
2. Then click View Text Inside File to view the text.
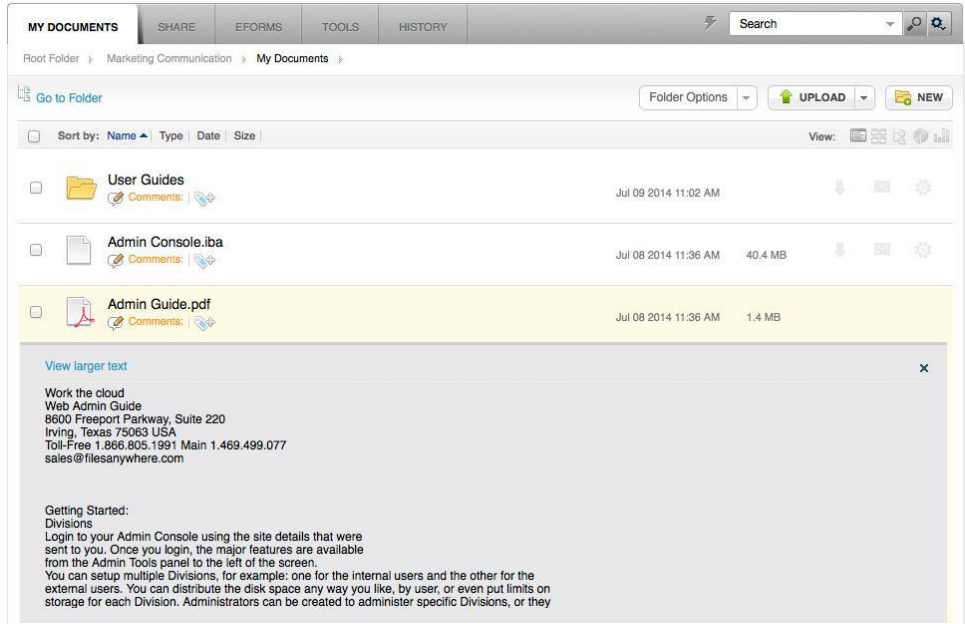
3. You can also use the search for look for specific strings of **Text in Files.**
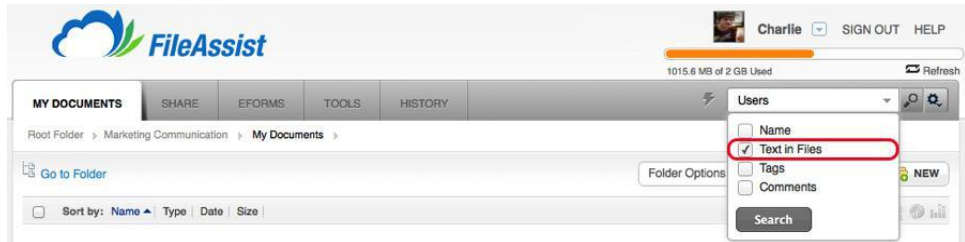
4. Type in the word or phrase and **then click Search.**

5. Click on the View Text Inside link display the text inside the file. Searched text
is highlighted inside the file content.

xiv. File Lifecycle

Need a way to do a little spring cleaning inside your FileAssist account? No problem! With this feature, you can automate the task of deleting older files and folders. With **File Lifecycle** feature, you can set rules regarding the expiration and automatic deletion of files and subfolders by designating a retention time period.

start

Let's Get Started:

After logging into your FileAssist account you may access **File Lifecycle** in one of two ways:

1. Right click the folder for which you wish to define a **File Lifecycle, highlight Properties** and **then click Advance Properties.** When the Folder Properties screen appears, **click the File Lifecycle tab.**

2. Click **Add Lifecycle Rule.**
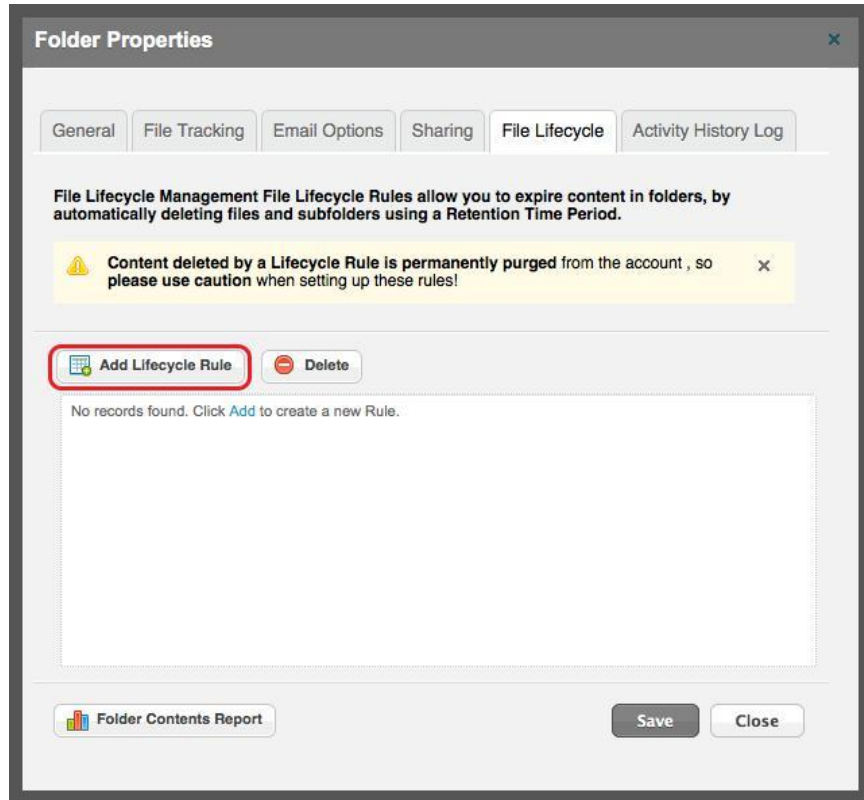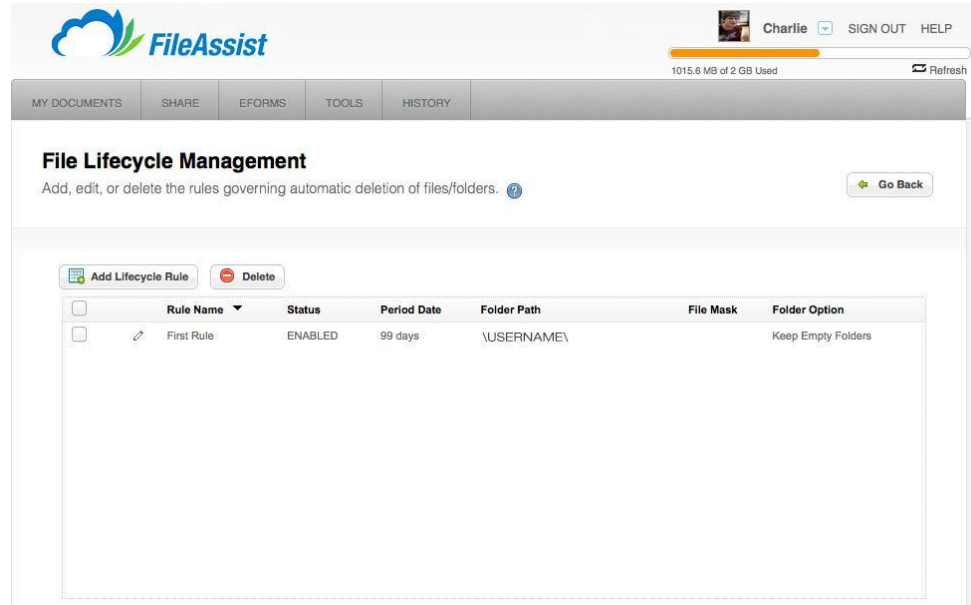
OR

3. You may **click the Tools tab** located at the top, when the **Account Tools screen** appears, **select the Manage File Lifecycle button.**
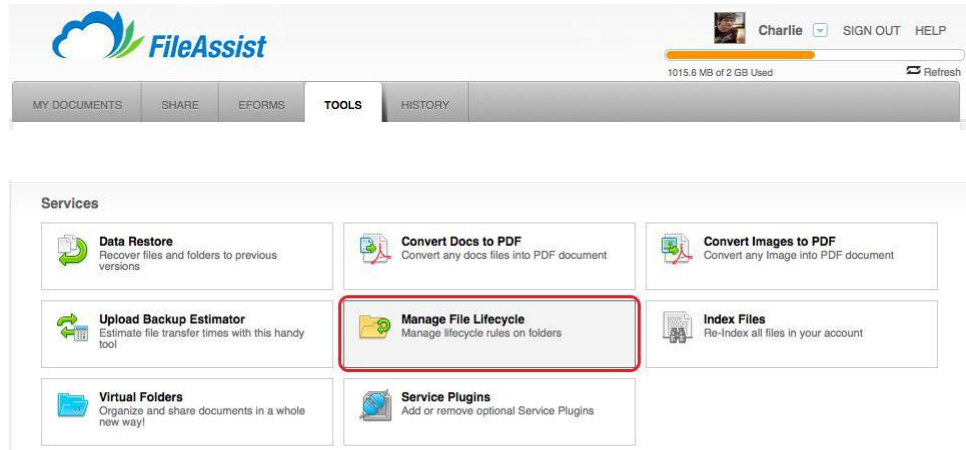
4. The **File Lifecycle Management** screen will appear. From here you can set rules to allow content to be deleted depending on the criteria you select. If this is the first time assigning a File Lifecycle, you must begin by adding a rule. Options are discussed on the next page.

Adding a Rule

To add a rule, **click the Add button** adjust the settings below and **then click Save.**

CAUTION: Files and folders governed by File Lifecycle rules will be permanently deleted.

- **Lifecycle Rule Name** – You can name the rule something easy to remember.

- **Folder Location** – This is the folder path that will be affected by this rule.

- **Delete Empty Subfolders** – If you want to keep empty subfolders, leave this unchecked.

- **Folder View** – This is how long you want to keep the files/subfolders in question.

- **File Names to Include** – Just like in a search box, put in the criteria you wish to include in the purge. For instance, if you wanted to erase all document files that are left in the folder after a week, then you'd do a search for *.doc (all matching files within the selected folder and in subfolders will be deleted).

- **Additional Recipients** – If you'd like to send the notification emails to other addresses, this is where you would add them and separate them with a comma (,).

- **Enable This Rule** – Leave this checked if you want the rule enabled. Otherwise, you can disable the rule by unchecking this option.

- **Email Report** – This will send an email notification of the purged files/folders to the email address on file associated with the account.

xv. Checkin and Checkout

Ever checked out a library book? The Checkin/Checkout feature follows the same concept. On enabled folders, you may check out a file to download and then edit. The Checkout locks the file, keeping others from downloading and making changes to the file at the same time. This allows for a collaborative environment with strict version control. You might also like more information on:

- Version Control Overview
- Enabling and Using Version Control

start

Let's Get Started:

1. Login to your account.

2. Locate the file you want to checkout in the folder tree.

3. Right click on the file and **select Checkout.**
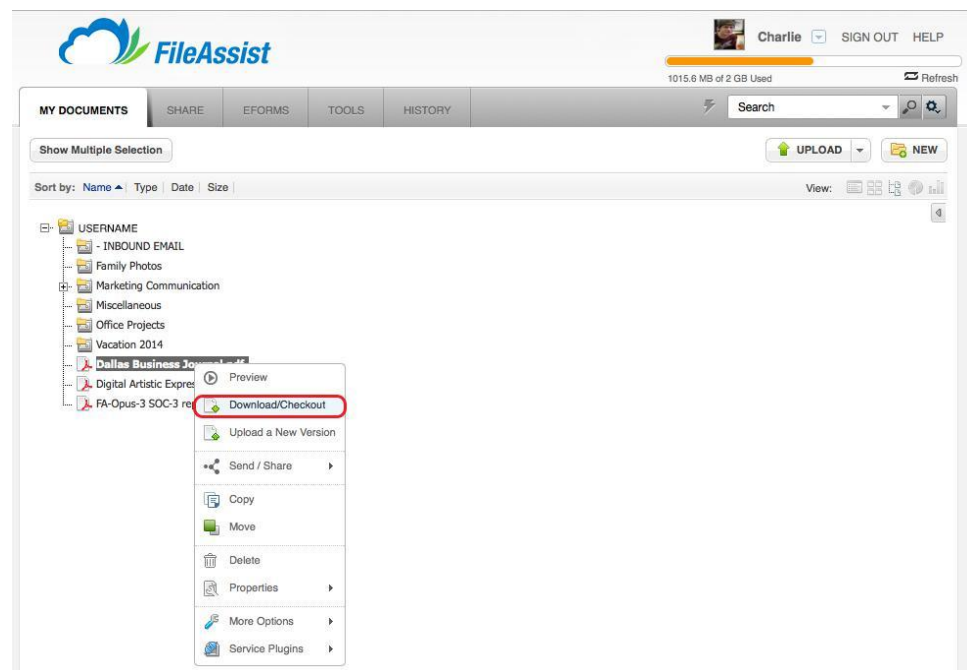
4. The Download screen will appear. Enter any necessary comments or additional email notification
recipients, **then click Download and Checkout.** The folder tree will reflect the checkout.
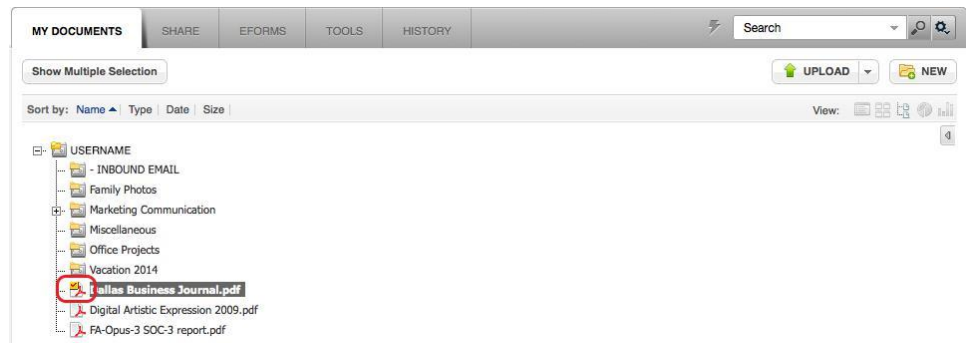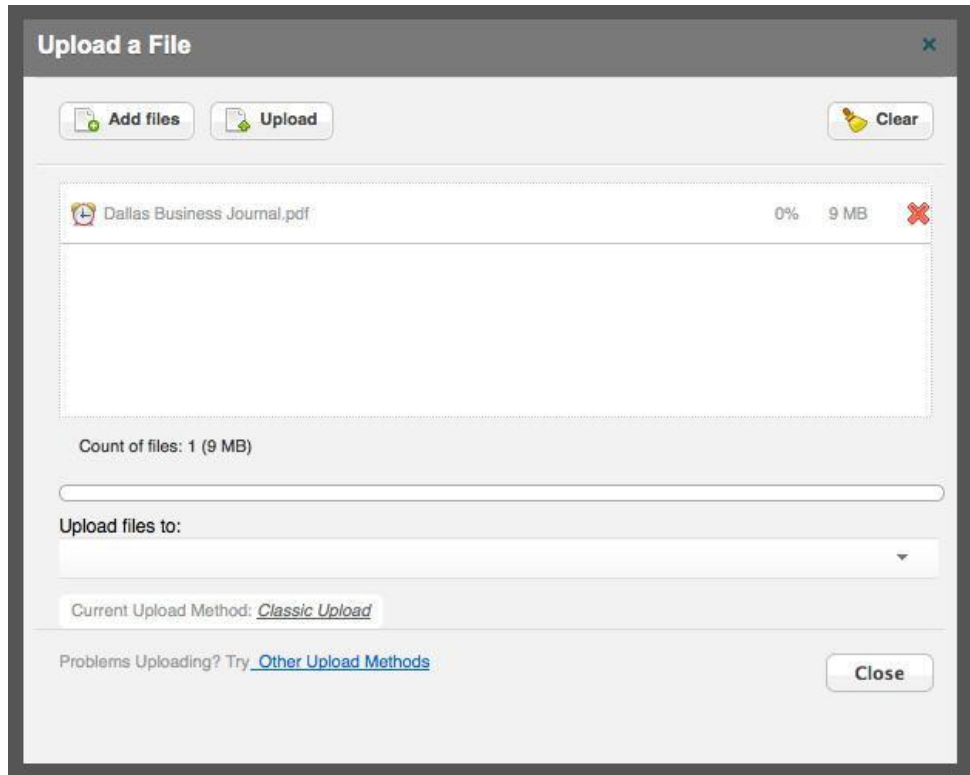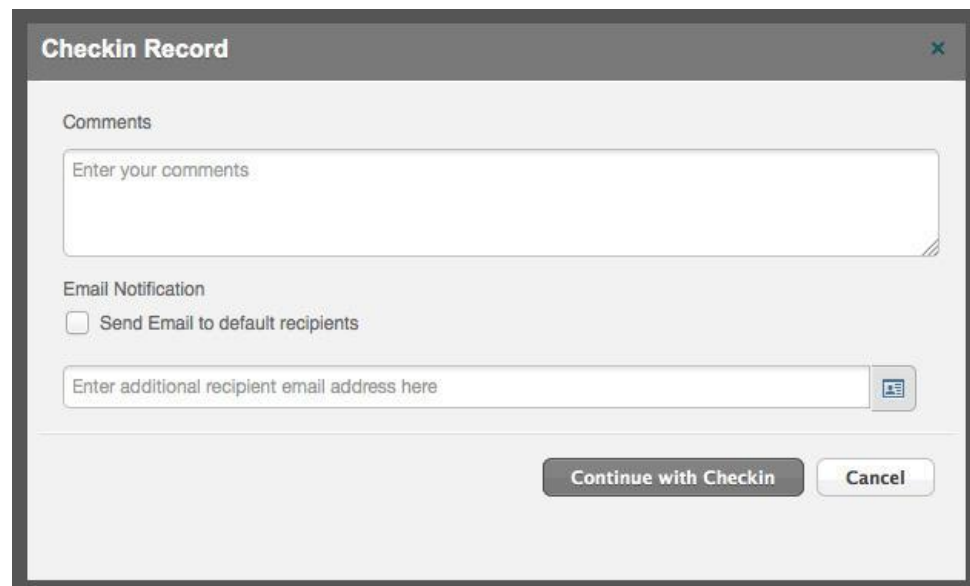
5. You'll be prompted to **open the file or save it to your local machine.** Once you've viewed/edited the file you may check it back in by uploading it. The Checkin is automatic and the account holder will receive notification that the file has been checked in.

xvi. Version Control

What do you get when you put together multiple folders, multiple users and lots and lots of files? The potential for a document version mess! Good thing we put measures in place that allow you better control over your files and how they are accessed or updated. Version Control allows multiple people to collaborate as a group automatically creating a backup copy of each file updated, protects against unintended, simultaneous edits to the same file(s) and tracks each new file version so there is a complete history of changes.

What is Version Control?

Version Control provides a structure for working on files in a team, along with detailed tracking, alerts and the ability to open any prior version of a file. Best of all, Version Control features are accessible by opening the **Properties tab** of any folder as outlined in these step-by-step instructions.

When to Use Version Control

Version Control is a great tool for any of the following situations:

• When two or more people are adding files or changing files to a shared set of files.

• When one or more users are making changes to files and each version of a changed file needs to be stored for historical, accounting, or legal reasons, or to rollback/refer to earlier versions in case of errors in more recent updates.

• When you are sharing files with others and wish to be notified of any file change.

• When you are sharing files with others in a group and wish to track user downloads.

Version Control Options

Version Control is a collection of features. There are four main Version Control options available:

• Checkin/Checkout

• Version History

• Disable Delete

• Email Notifications

(i) Enabling and Using Version Control

Need to work on documents with someone who's in another location, or even another city? Cloud collaboration is one of the fastest, most convenient ways to work with another individual or team, even when that team is spread out. To help streamline the cooperative process, FileAssist offers Version Control as built-in features perfect for multi-user editing.

This group of version control features includes Checkin/Checkout, version history, disable delete and email notifications. Keep in mind that if you normally use WebDAV to access your files, you'll need to login to the FileAssist web interface to use Version Control features. You might also be interested in:

• Step-by-Step Instructions: Using Checkin/Checkout

start

Let's Get Started:

1. Login to your account.

2. Select the folder you want to add version control to, **right click, highlight Properties** and **then select Advanced Properties.**
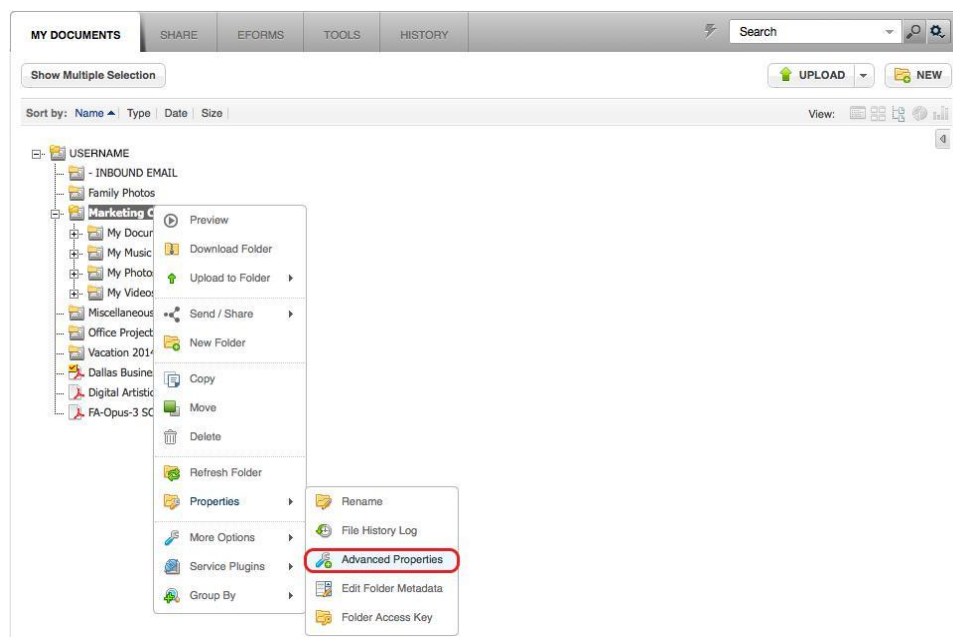
3. When the Folder Properties screen displays, **click the File Tracking tab.** Here you can enable the **Version Control features** below.

File Tracking Section

File History Logging Checkbox – When enabled, file history logging allows you to keep the number of versions you designate in the **Keep Drop-Down menu.** Options are 0–10 and All. You can view file version in the **File History Log** by **clicking the View File History Log** button in this screen.

Checkin and Checkout Checkbox – When enabled, Checkin/Checkout requires other users to **Check Out** a file to view, edit, or collaborate. This locks the file from being downloaded by another user at the same time. Once a user has completed viewing, editing, or collaborating on a document, it must then be **Checked In** to upload it to the account. The **Undo Checkouts button** allows the account owner to remove the Checkout status of files, unlocking them for other users to download. The **View Checkout Log button** takes you to the File History Log that lists the details of files checked into and out of the designated folders.

Disable Delete Checkbox – When enabled, the **Disable Delete feature** stops any other user from deleting files from the account. Even subaccounts with full access to the designated folder cannot delete files once enabled.
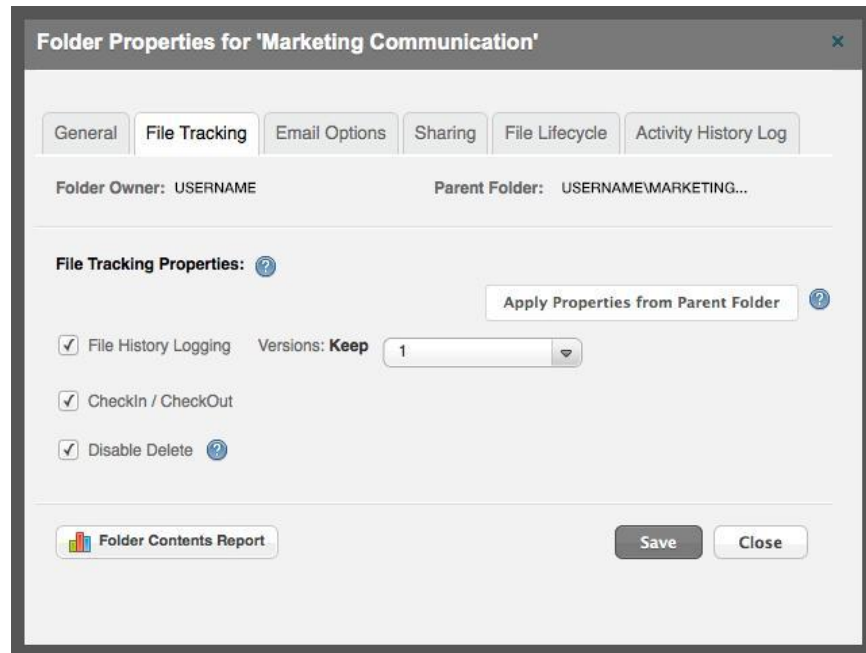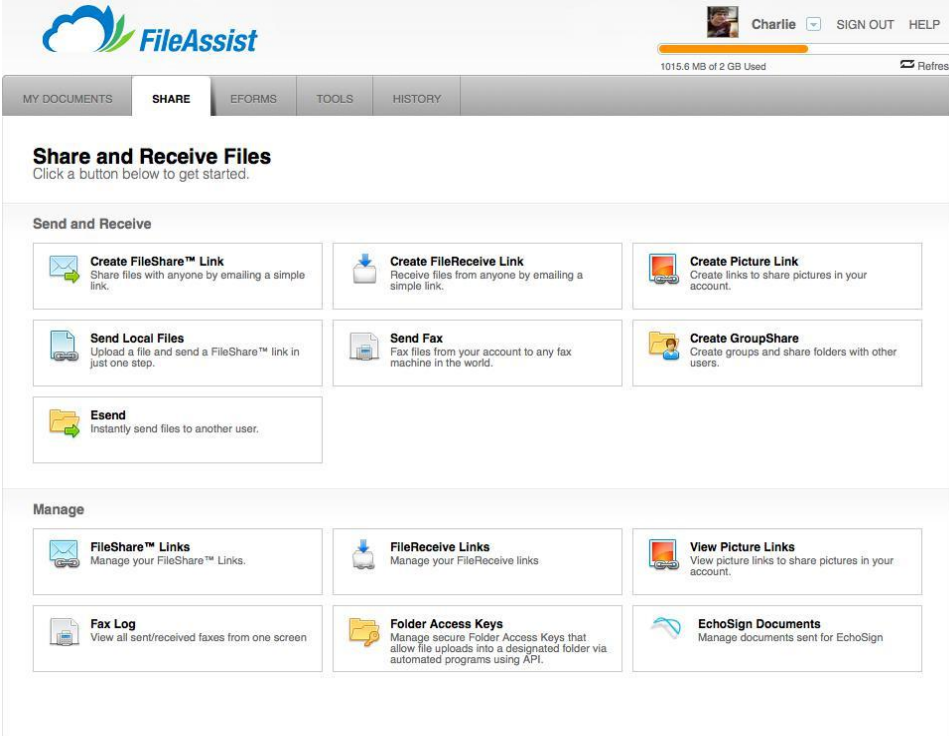
IMPORTANT INFORMATION ABOUT CHECKIN/CHECKOUT

- Because Version Control keeps multiple file versions within your account, additional storage is used to retain each version.

- Enabling Version Control for the parent folder causes all subfolders to inherit those settings.

- When enabling Version Control, no files are changed.

- You may change or remove Version Control settings at any time.

III. Share

i. Share Tab Overview

From the **Share tab** you can send, receive and manage your links.

Send and Receive

- **Create FileShare Link** – Send files and folders to an email address.
- **Create FileReceive Link** – Send a link via email to let someone upload files and folders into the account.
- **Create Picture Link** – Create's a link to share images.
- **Send Local Files** – Uploads files to the account and sends them with one simple process.
- **Send Fax** – Allows users to send faxes. (Optional)
- **Create GroupShare™** – Share folders with different users with permission levels suited to every occasion.
- **Esend** – Instantly send files to another user.

Manage

- **FileShare Links** – Review, edit and update settings on the links.
- **FileReceive Links** – Review, edit and update settings on the links.
- **View Picture Links** – Review, edit and update settings on the links.
- **Fax Log** – Review sent faxes. (Optional)
- **Folder Access Keys** – Manage keys that allow uploads via automated programs utilizing API.
- **EchoSign** – Manage documents send for EchoSign.

ii. Send and Receive

(i) FileShare Links

FileShare
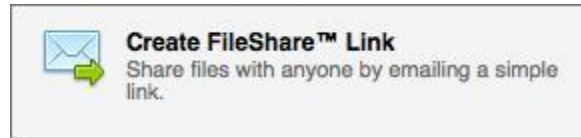
FileShare allows you to share files with anyone, even if the recipient isn't a FileAssist user. Select the file(s) you would like to send, choose the **FileShare** button and enter your recipients' email address(es). A link is generated that can then be emailed or copied/pasted to your desired location. Recipients just click the link to download the files you shared. **FileShare** also comes with enhanced features, such as permissions, tracking and history, giving you the ability to control your data.

a. Creating FileShare Links

Want to share your files easily and instantly. You bet! Send anyone (including non-members) the document(s) of your choice anytime, anywhere with **FileShare.** Add as many files as you wish and each file shared can be any size up to the full storage size of your account using a simple web-based link. Your recipient is notified with an email that contains the **FileShare Link.** Just follow the step-by-step instructions on creating a **FileShare Link,** or watch this helpful video tutorial.

List View

Click the **mail icon with a small green arrow** as **shown in red below.**
Click the **FileShare tab** that appears below.
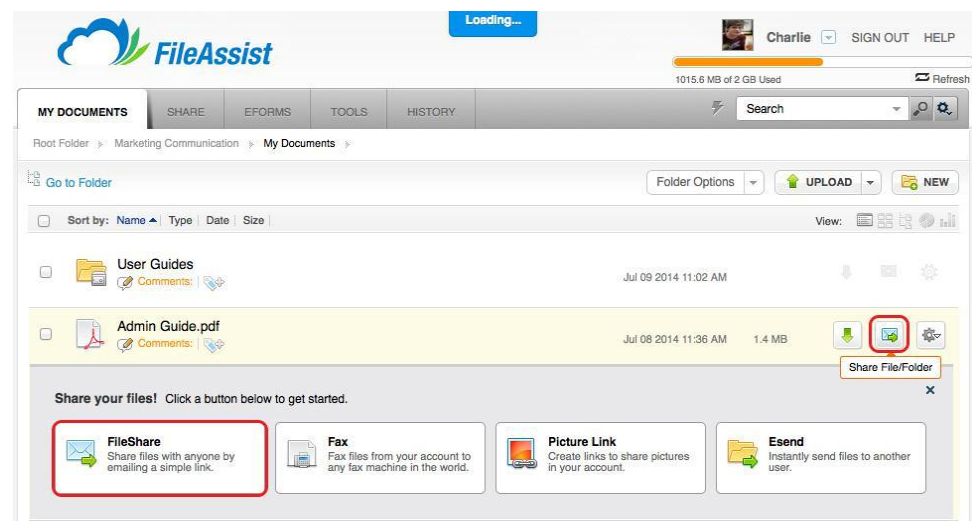
Icon View

Hover over a file icon and **click the downward facing arrow** that appears in the top right hand corner. **Scroll down to Send/Share** and **select GroupShare™.**
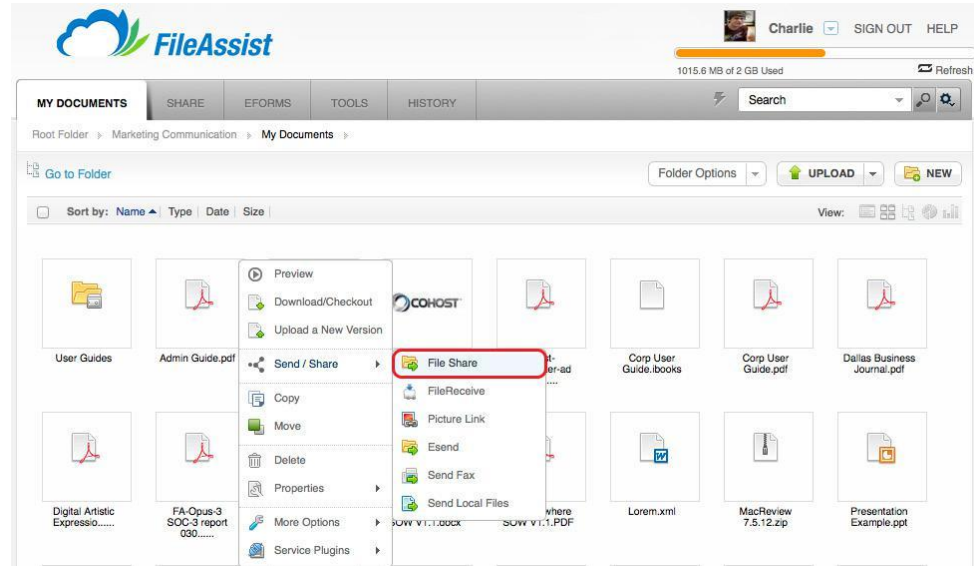
Tree View

Right click on a file, scroll down to Send/Share and **click FileShare.**
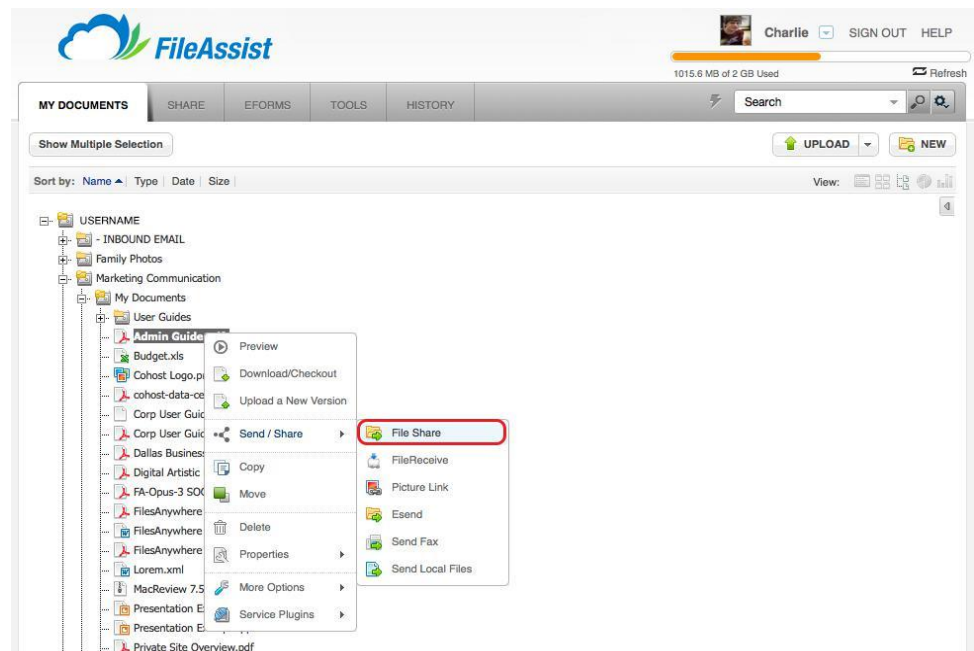
From the Share Tab
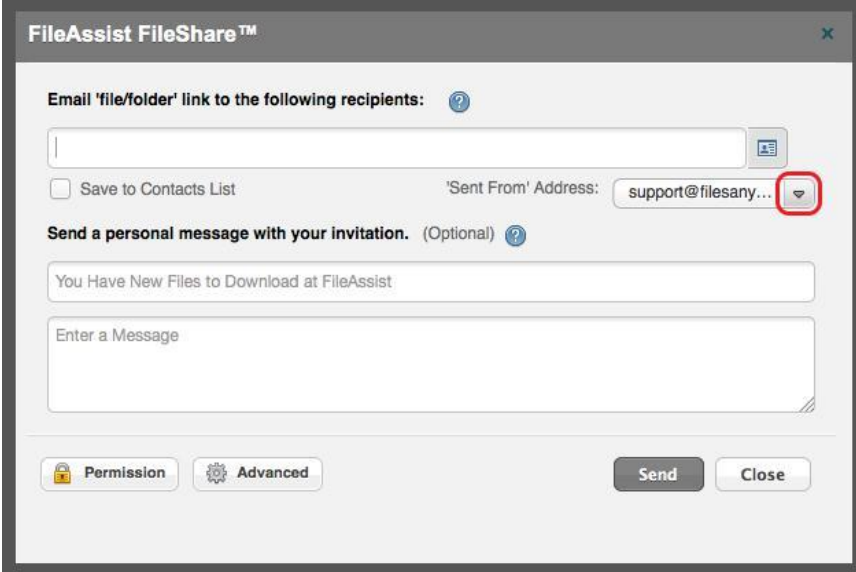
1. Open the Share tab and **click Create FileShare Link.**
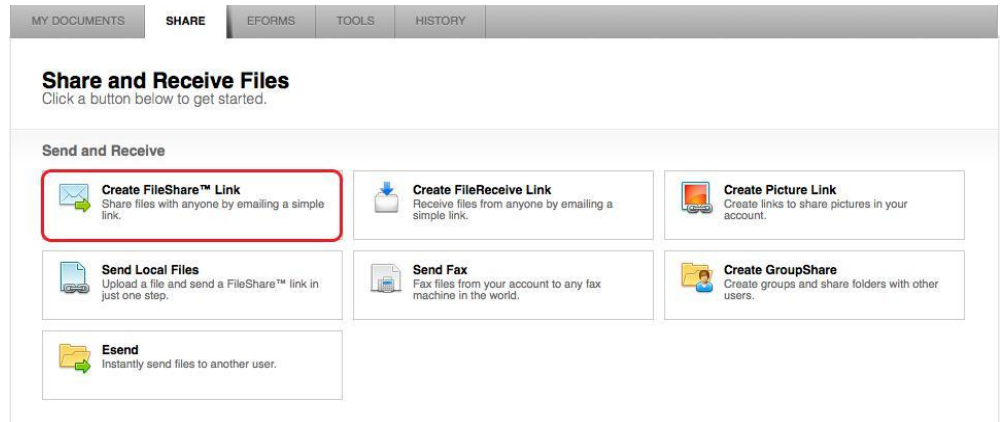
2. Click Add Files/Folders and **select a file** or **folder** from your account, **then click Send Link.**
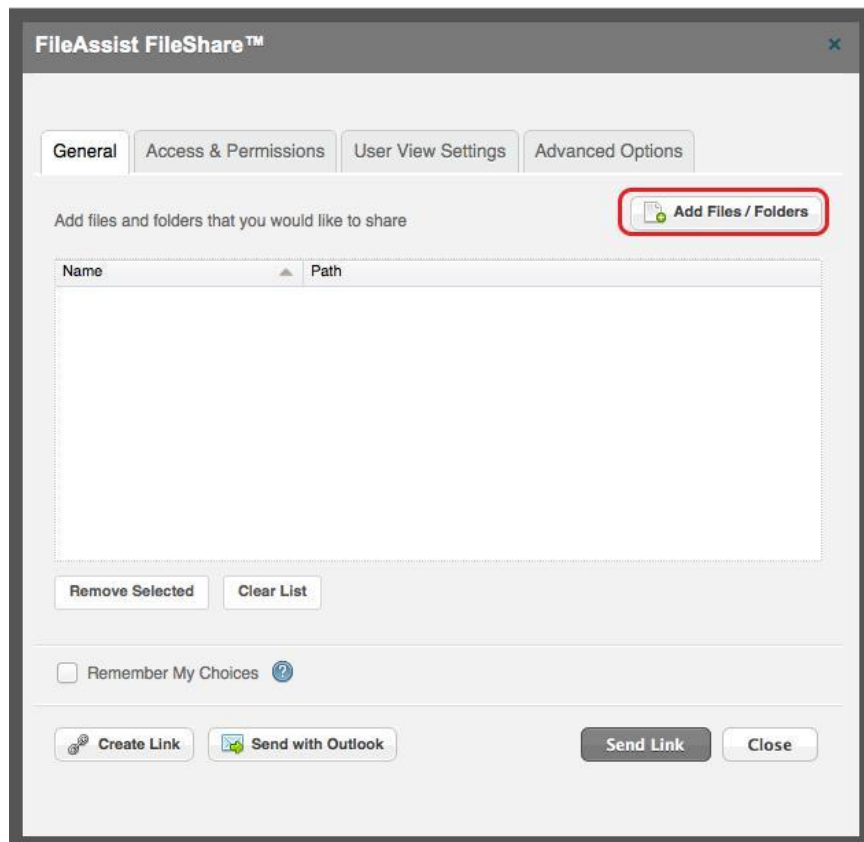
3. Enter the email address(es) you wish to send the link to, **select a Sent From Address,** and **click Send**.

- The Send Link feature does not send a notification email to the creator of the **FileShare Link.** If you wish to receive and view the **FileShare Link** notification that your recipients will see, you must include your email address with the other recipient email addresses where prompted.

- If your email server doesn't use SSL to send emails, you may want to use either the Send Link or Password Protect feature. Send Link uses FileAssist built-in, secure email system. Password protect allows link access via 128-bit SSL encryption.

- For existing **FileShare Links,** you can change the notification settings, cancel the link, or extend the link by modifying the properties. For more information, view the step-by-step instructions for Modifying a FileShare Link.

b. Advanced FileShare Link Features

Access and Permissions Tab

Permission Section

A: Password Protection Field – Allows you to encrypt your documents with a password. Recipients who follow the **FileShare Link** will be asked to provide the password before accessing the files.

B: Link Expiration Field – Allows you to set an expiration date for the **FileShare Link.** You may also select Never Expires.

C: Allow recipients to view the file online only, not download or save the files.

D: Limits the number of downloads per recipient, or allow unlimited access.

E: You may select a **Do Not Display option** to hide your name or email address.

F: Select this option to provide a comment box for recipients to add comments to your files.

Tracking Section

G: Request a receipt for opened emails.

H: Elect to receive an email when notification when recipients access **FileShare Link.**

I: Elect to keep a File History Log and record all **FileShare Links** and details associated with them.

User View Settings Tab
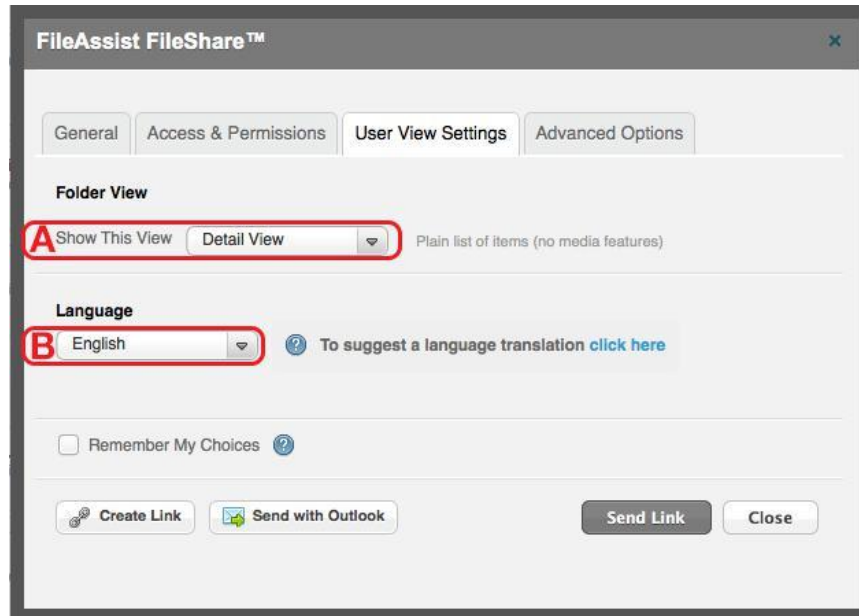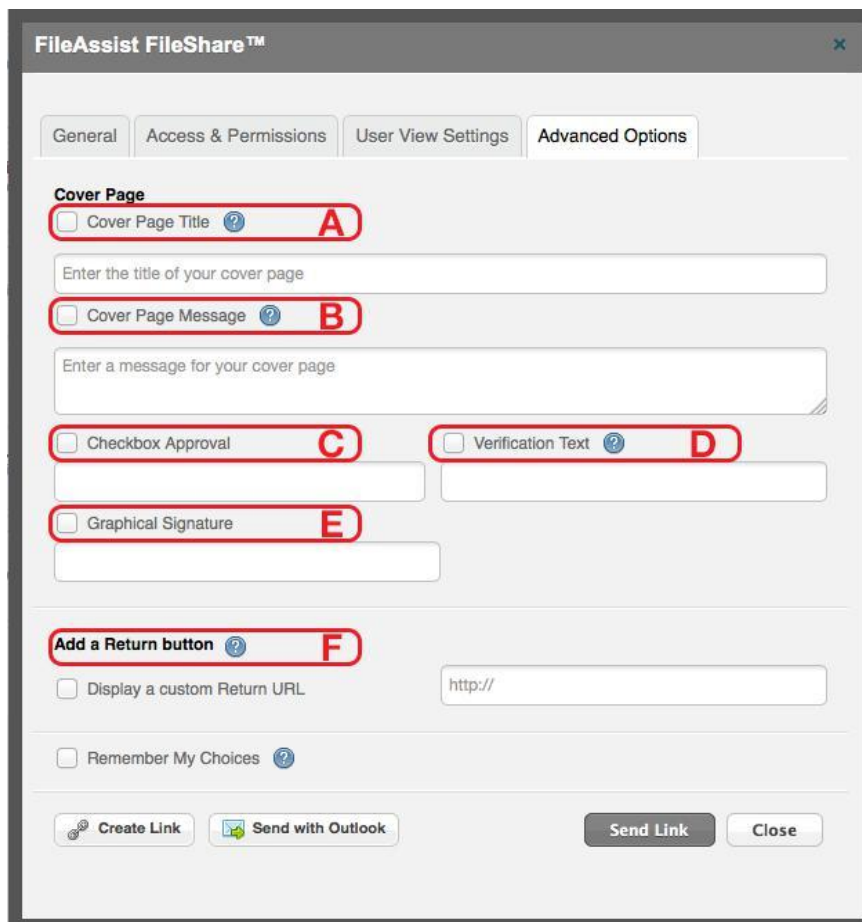
Folder View Section

A: This field allows you to change the view your recipients will see. Options include a **Detailed View (list of items), Icon View (thumbnails), Comments View (same as Icon View with addition of comments box)** and **Play Slideshow/Media (automatically begins the slideshow/video/media upon download).**

Language Section

B: Select a language for recipients to view in.

Advanced Options Tab

By selecting options under this tab, you may add a cover page to display before recipients access files.

A: Elect to add a title to the cover page by clicking the checkbox and typing the title in the field below.

B: Elect to add a message to the body of your cover page and type it in the field below.

C: Elect to require that recipients read and agree to your terms and conditions before viewing a **FileShare Link.** The auto fill text will default to **I Agree,** but you may enter your own content in the field below.

D: You may elect to require recipients confirm that they are, in fact, the recipient of your **FileShare Link.** The auto fill verification text defaults to **Enter Your Name,** but you may enter your own verification content in the field below.

E: If selected, the Handwritten Graphical Signature requires flash on the recipients computer in order to complete. Recipients use their mouse or finger pad to **Sign For** the **FileShare Link.**

Return URL Section

F: Elect to redirect a recipient to a specific website upon logout. Enter the URL in the button URL field. This feature will display as the **Logout button** on the **FileShare Link** link page and when clicked, will redirect the recipient to the indicated web address.

At the Bottom of Every Tab

The Remember My Choices Checkbox appears at the bottom of every tab, however it is not specific to each page. If you elect to save your preferences, it will save the selected preferences from every tab and assign these preferences to future links. Additionally, you have three options for **FileShare Link Distribution,** including **Create Link, Send with Outlook** and **Send Link.**

c. FileShare Link Distribution Methods

Once you've chosen the files you'd like to share and created the permission that will govern your **FileShare Link,** you have several options for distribution.

Options for Sending a FileShare Link:

Create Link – Selecting the **Create Link button** prompts the **FileShare Link window.**

Send with Outlook – Selecting the Send with Outlook button prompts an Outlook email window containing the **FileShare Link.** Additionally, the **FileShare Link window** will open underneath the Outlook email window.

Send Link – Selecting the **Send Link button** prompts the email window.
See the **Send Link email screen below.**
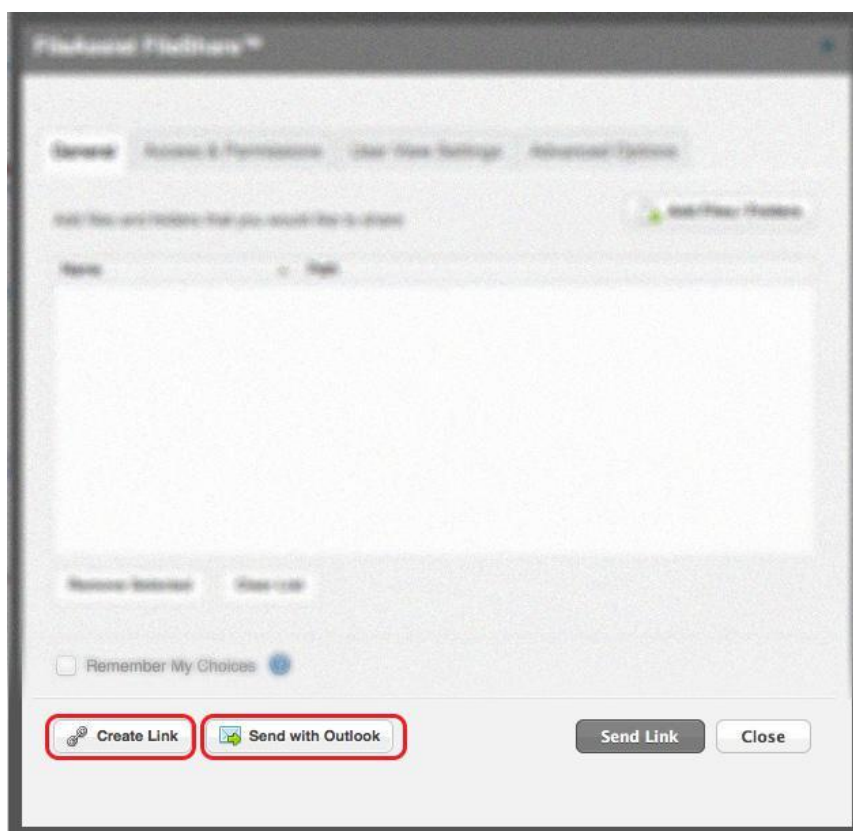
Send FileShare Link Screen

A: Manage FileShare Links takes you to the **FileShare History Log.**

B: Create New FileShare Link takes you back to the **FileShare** main screen where you may create a new **FileShare Link.**

C: The General Link field provides you with the link URL that may be copied/pasted.

D: The **Try Link Now button** opens a new tab with the link to review what was sent.

E: The Copy button will copy the link and place it on your clipboard.

- The Send Link feature does not send a notification email to the creator of the **FileShare Link.** If you wish to receive and view the **FileShare Link notification** that your recipients will see, you must include your email address with the other recipient email addresses where prompted.

- If your email server doesn't use SSL to send emails, you may want to use either the **Send Link** or **Password Protect feature.** Send Link uses FileAssist built-in, secure email system. Password protect allows link access via 128-bit SSL encryption.

- For existing **FileShare Links,** you can change the notification settings, cancel the link, or extend the link by modifying the properties. For more information, view the step-by-step instructions for Modifying a **FileShare Link.**

(ii) FileReceive Links

FileReceive Links

You can designate a folder to receive files from anyone, even if the sender isn't a FileAssist user. **FileReceive Links** can be emailed, or copied/pasted to your desired location. The sender clicks the link, adds the file(s) and sends them straight to your account. **FileReceive Links** also come with advanced elements, such as individually designated folders, password protection and link tracking, giving you the ability to manage incoming information. For more information, view the step-by-step instructions for **FileReceive Links.**

a. Creating FileReceive Links

FileReceive Link allows anyone to share files with a FileAssist user, even files that are too big to be sent via email. Once created, you can share **FileReceive Links** with friends, family, coworkers and anyone else, even those without a FileAssist account. All you need to share almost anything, from media to photographs and documents, is an email address. How convenient! You might also be interested in more information on:

• Accessing **FileReceive Folders** and **Files**

• **Advanced FileReceive Folder** and **Link Features**

• Sharing Files with **FileReceive Links**

• Modifying **FileReceive Links**

• Active **FileReceive Link Log**

• **FileReceive Link** Distribution Options

start

Let's Get Started:

1. First, **Login** to your FileAssist account. Then you may either:

2. Click the Share tab on your FileAssist toolbar, near the top left corner of the screen.
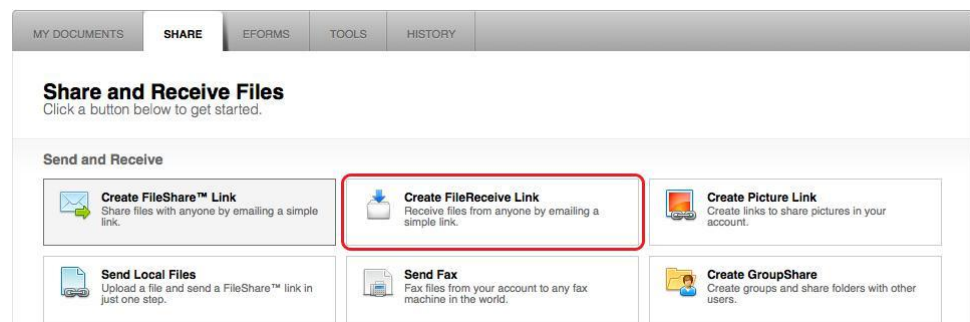
OR

3. Right click in the Folder Tree section and **select Create a File FileReceive.**
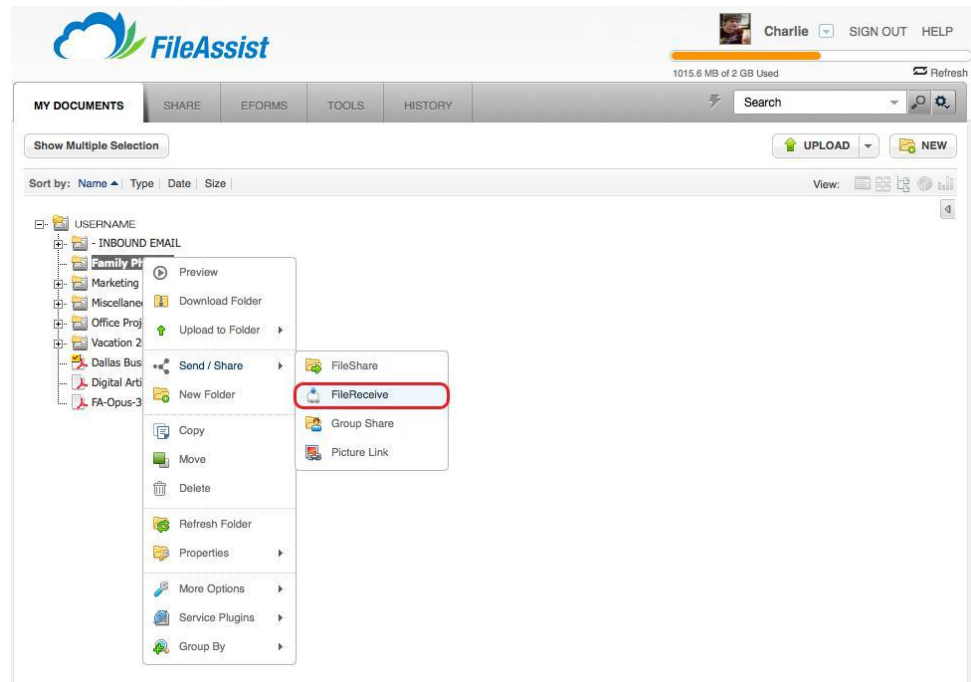
4. Once you've selected **Create a File FileReceive** as your function, a new screen will appear.
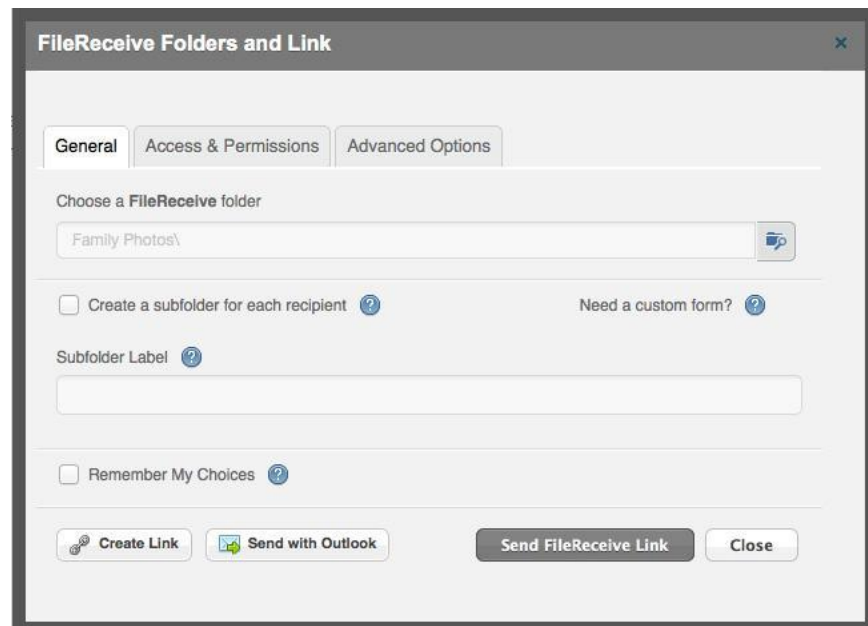
Now, Let's Go Over the Steps to Create the FileReceive Link.
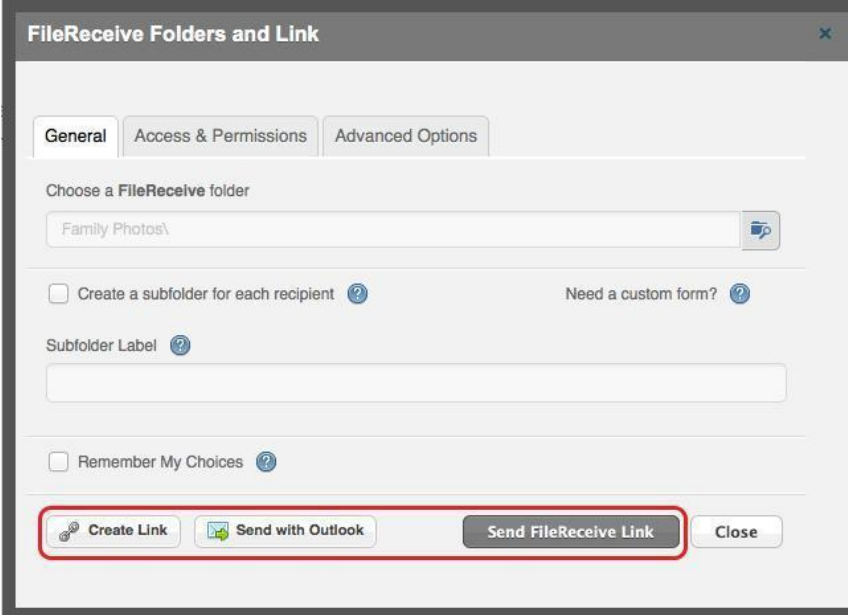
1. Decide which folder you wish to designate as **FileReceive Folder,** or you may create a new folder in the tree to designate as your **FileReceive Folder.** The default setting is your root folder in your FileAssist account. If you wish to change the folder, select the browse button.

NOTE: When creating a new **FileReceive Folder,** you may name it whatever you wish. However, we suggest naming the folder **FileReceive Files** to avoid confusion.
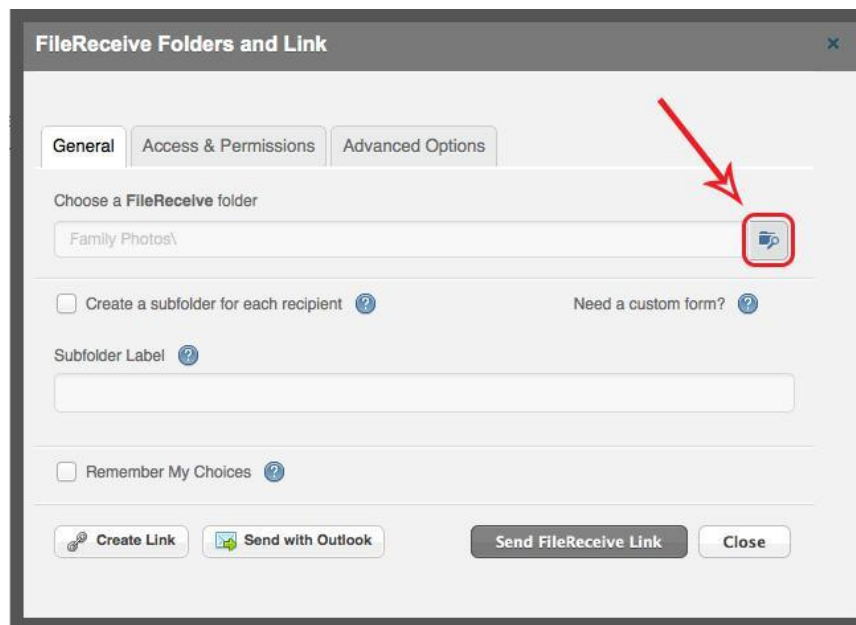
2. The **Browse Folder prompt** will appear and you may select a folder the tree.

3. Once you select the folder you wish to use, **select the Permissions** and **Rules** you wish to assign the **FileReceive Link.** The **Advanced FileReceive Folder** and **Link features** article provides a complete explanation of the permissions and rules.

4. Select the distribution method for your **FileReceive Link.** For a complete explanation of each distribution method, refer to the **Advanced FileReceive Folder** and **Link features** article.

5. If you selected **Send Link,** a popup confirmation lets you know your **FileReceive Link** is successfully sent.
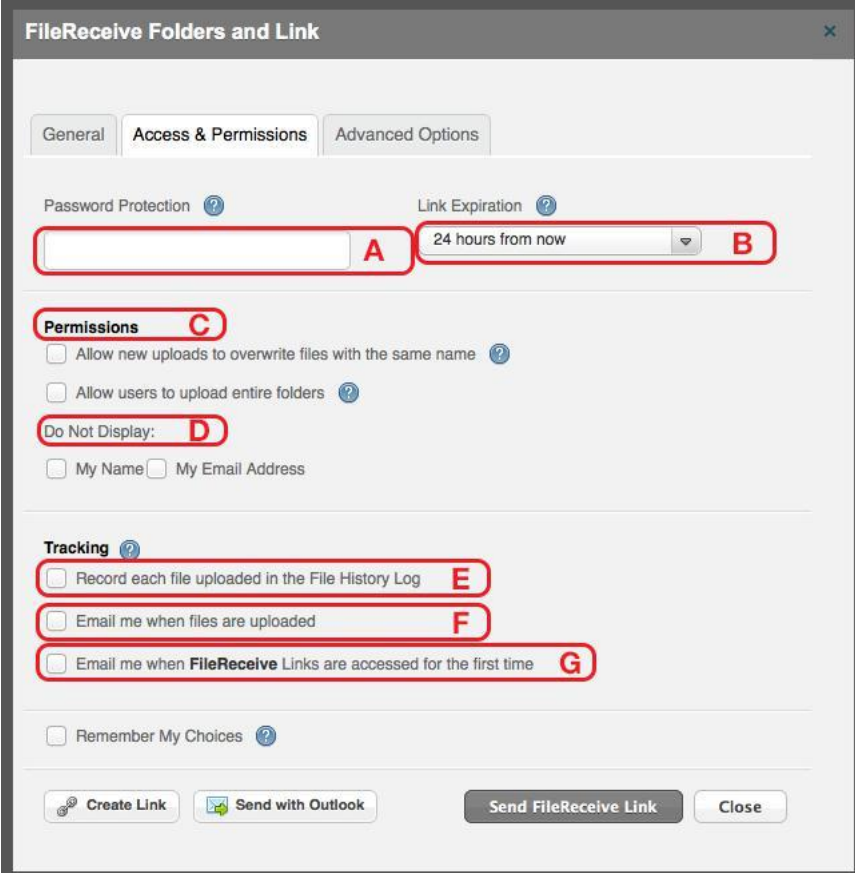
IMPORTANT INFORMATION ABOUT THE FILERECEIVE SERVICE

- There is no limit on the number of files that may be uploaded to **FileReceive Folders** and each file that is shared or uploaded can be up to 2 GB, up to the full storage size of your account.

- Only designated email contacts that you specify can send you files.

- SSL 128-bit encryption during the transfer for complete security.

- Files sent to you are already organized into the folder structure you have setup for storage.

- Guest senders are not required to sign up. The **FileReceive Service** is free for the guest sender and included in your FileAssist plan at no extra charge.

b. Advanced FileReceive Folders and Link Features

FileReceive Folders and Link features give you the ability to control the way data is shared with you. Track links, enable the overwrite feature, designate a return URL and more. Easy? Totally! And it just takes a few clicks to customize **FileReceive Folders and Link** just the way you want.

Access and Permissions Tab

Permissions Section

A: Password Protect Field – Allows you to encrypt your documents with a password. Recipients who follow the **FileShare Link** will be asked to provide the password before accessing the files.

B: Link Expiration Field – Allows you to set an expiration date for the **FileShare Link.** You may also **select Never Expires.**

C: When enabled, new files uploaded to your **FileReceive Folder** will overwrite older files of the same name. *If you need to retain versions of different files, then do not enable the overwrite function.*

D: You may select a **Do Not Display option** to hide your name or email address.

Tracking Section

E: Enable the Keep File History Log of Each File Upload to keep a history of uploaded **FileReceive** files.

F: Enable the Send Email on Each File Upload to receive an email notification when a sender uploads files to your **FileReceive Folder**.

G: Enable the Send Email When Web Link is Accessed to receive an email notification each time **FileReceive Links** are accessed by recipients.

Advanced Options Tab
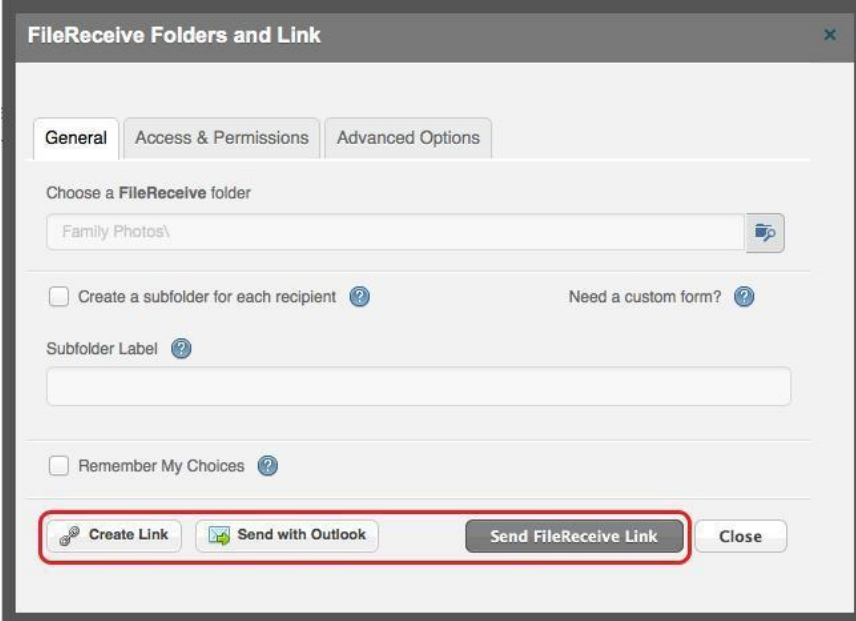
Select Language Section

A: The default selection allows **FileReceive Link** recipients to view windows in their own language selection.

B: You may also choose to enable a different language from the drop-down menu.

C: The **Display a Custom Return button** allows you to create a custom button and designate a return URL. When **FileReceive Link** recipients click the button, they are automatically directed to the URL you designate.

c. FileReceive Link Distribution Options

Choices are a great thing! FileAssist gives you lots of options to share and receive data, including multiple ways to distribute **FileReceive Links.** Here you'll find a quick overview of **FileReceive Link** distribution methods.

After selecting the options and permissions to govern your **FileReceive Link,** you have **three options** for sending the link to recipients; **Create Link, Send with Outlook** and **Send Link.**
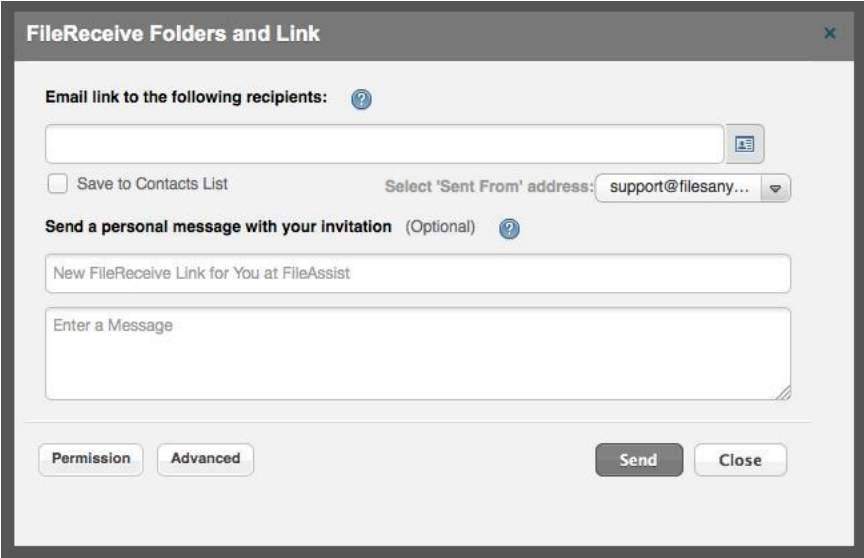
1. The **Create Link** button provides a link you may copy and paste to your desired location, including email, social networking sites, forums, etc.

2. The **Send with Outlook** button prompts an Outlook email window containing your **FileReceive Link.**

3. The **Send Link** button prompts the FileAssist email system giving you additional options.

- Manually enter email recipient email addresses or select the **Search Contacts Link** to add email addresses saved in your contacts list.

- Select the **Save to Contacts Checkbox** to add manually entered email addresses to your contacts list.

- You may elect to display your email or the FileAssist support email as the **Sent From Address** for your recipient's email notifications.

- The Subject line contains default text that may be personalized if you wish.

- You may enter an optional message for your **FileReceive Link** recipients in the Message field.

- Once complete, selecting the **Send** button distributes your **FileReceive Link**.

NOTE: FileAssist does not save the email addresses or messages entered when creating **FileReceive Links.** If you need to create a record of the message, please make sure to send yourself a copy of the email. You may view **FileReceive Link** recipients in the **Active FileReceive Link Log.**

d. Accessing FileReceive Folders and Files

Did you receive notification that you've received files in your **FileReceive Folder?** Great! Accessing your **FileReceive Folders** and **Files** is so easy, you won't want to receive files any other way. You might also be interested in more information on:

- Creating **FileReceive Links**
- Sharing Files with **FileReceive Links**
- **Advanced FileReceive Folder** and **Link Features**
- Modifying **FileReceive Links**
- Active **FileReceive Link Log**
- **FileReceive Link** Distribution Options

start

Let's Get Started:

1. Login to your FileAssist account.

NOTE: If you are already logged into your account, you may need to refresh the page in order to see new files uploaded to your **FileReceive Folder.**

2. Depending on the settings you chose for your **FileReceive Folder,** you may access your files one of two ways:

a. If you chose to create subfolders for each sender, select the folder associated with the sender.
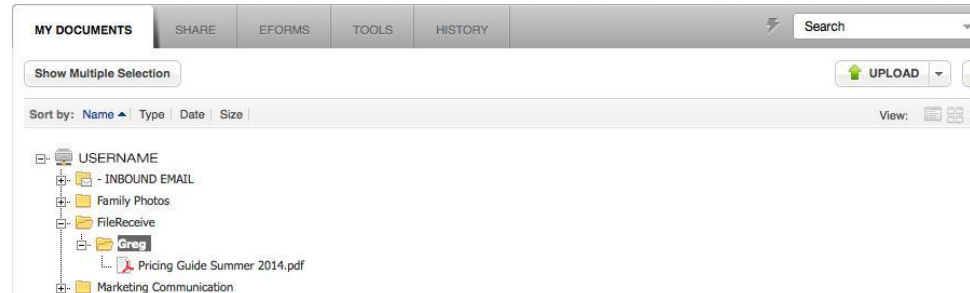
b. If you did not choose to create subfolders for each sender, documents shared with **FileReceive Links** will appear under the folder you designated.
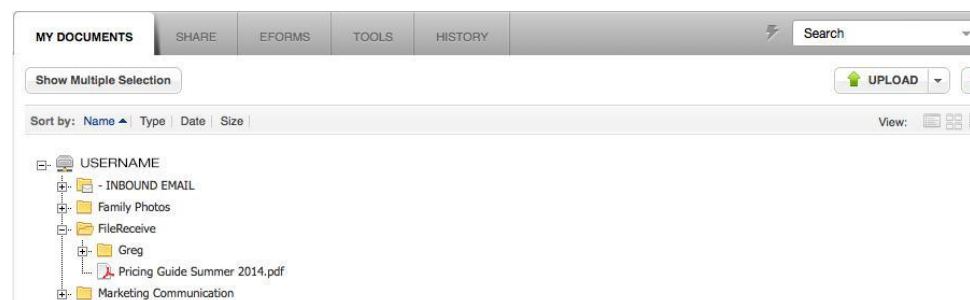
e. Sharing Files with FileReceive Links

Ready to start using **FileReceive Links?** Awesome! **FileReceive Links** are simple, instant and can handle the large files that email can't, all of which makes your online life easier. If you've been invited by a FileAssist user to send files with **FileReceive Links,** get ready to be amazed as you simply click, add files and share in a snap. Not a FileAssist customer? No problem! Guests are welcome to use **FileReceive Links** free of charge. If you enjoy the service, be sure to sign up at file-assist.com and take advantage of our enhanced and customer-to-customer features! You might also be interested in more information on:

- Creating **FileReceive Links**
- Accessing **FileReceive Folders** and **Files**
- **Advanced FileReceive Folder** and **Link Features**
- Modifying **FileReceive Links**
- Active **FileReceive Link Log**
- **FileReceive Link** Distribution Methods

start

Let's Get Started:

1. Click the link in the notification email to access the FileReceive Link.

Hello,

A new FileReceive Link was created for you. Please use this link to upload files to the sender. If clicking the link does not work, manually copy the link and paste it in your web browser.

FileReceive link: Click here to access FileReceive

FileReceive Details have been given below:

FileReceive Link Sent By:	USERNAME	[USER@EMAIL.COM]
Link Expiration:	7/11/2014 11:56:05 AM	

If you have questions about the files, please contact the sender: USER@EMAIL.COM
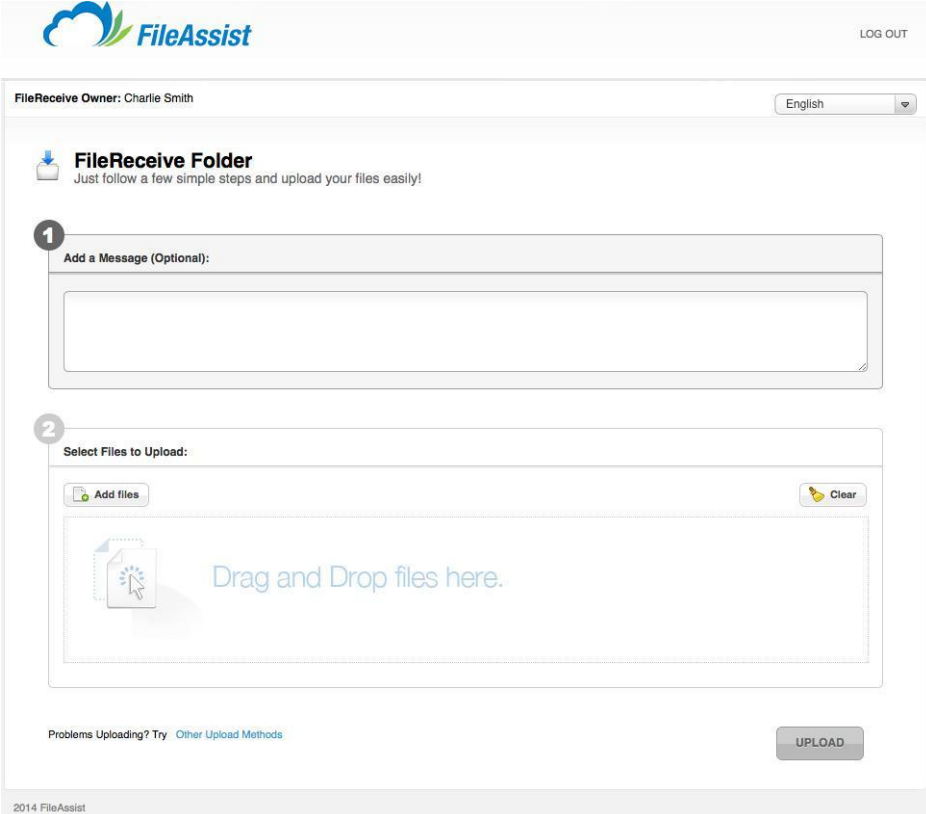
Thank you for using our service.

FileAssist ™

You can also copy this link to your web browser:
https://private.filesanywhere.com/KMPROJECTS/DropBox/db.aspx?v=8d6ba8c55aa4adbd70a9
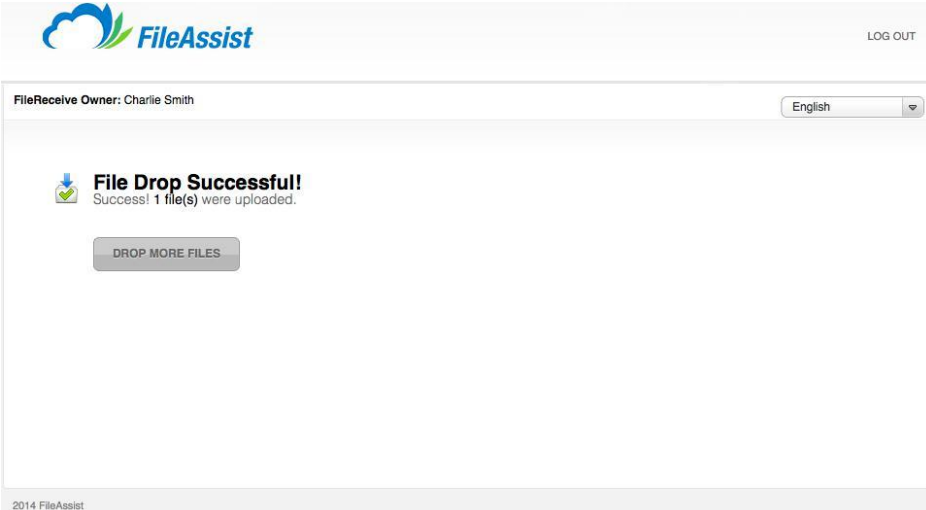
2. A page will open in a new browser tab. The top of the page displays the **FileReceive Link** owner and his or her email address. To begin sharing files, **click the Add Files button.** A new window will open allowing you to select files from your local drive.

3. Once you chosen all the files you'd like to upload via the **FileReceive Link, you may add a message for the recipient.** The message will appear in a notification email to the **FileReceive Link** owner that they have received new files from you.

4. Finally, click the UPLOAD button. A progress bar will show how quickly your files are loading.

5. A confirmation lets you know that your files uploaded successfully.

IMPORTANT INFORMATION ABOUT USING THE FILERECEIVE SERVICE

- There is no limit on the number of files that may be uploaded via **FileReceive Links** and each file that is shared or uploaded can be of any size, up to the full storage size of the recipient's account.

- File transfers are secured with 128-bit encryption.

- Guests are not required to sign up in order to share files through **FileReceive Links.**

(iii) Picture Links

Picture Links

Create Picture Link
Create links to share pictures in your account.

Sharing pictures has never been easier! From personal photographs to professional albums, Picture Link allows you to share as many photos as you like without the size limitations of email attachments. You can add photographs, create individual links and then share the link with friends, family, clients, or post in forums you like to visit. FileAssist also generates HTML code for your photo, giving you additional options for embedding your picture in HTML documents.

a. Creating a Picture Link

Now that you've created an online library of photos, you can use picture links to share images with friends, family, clients, or colleagues. Upload entire folders or just a single file, then use the enhanced functionality to create custom water marks or embed your photos in forums, websites and more. As long as the link is being accessed, it remains active for your recipients to enjoy. High-resolution photos and other large picture files are no match for **Picture Link!** You can literally share photos of any size in an instant! Don't forget, you can also send data and documents with:

• Creating **FileShare Links**

• Creating **FileReceive Links**

• Sending a Fax (Optional)

• Esend

• Creating a **GroupShare**

start

Let's Get Started:

1. Login to your FileAssist account.

2. Select the **Share tab** from the toolbar.

3. Click the Create Picture Link button in the **Share and Receive Files** section.
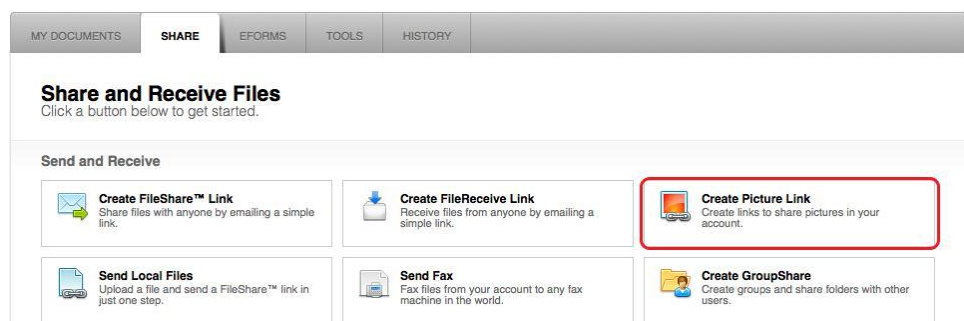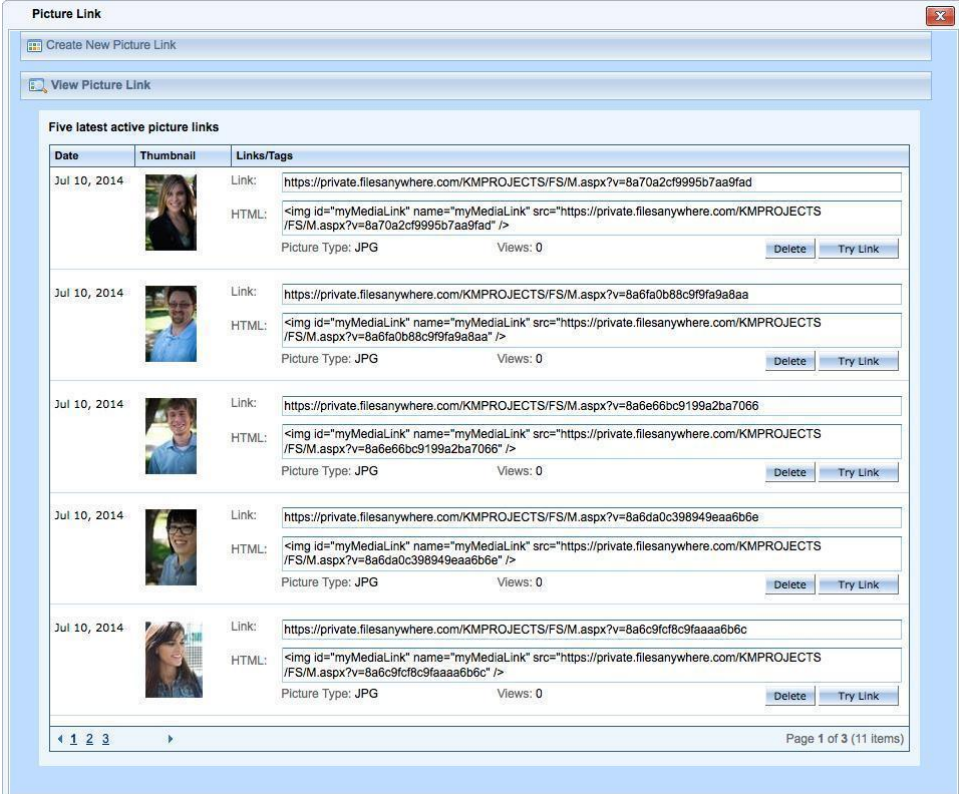
4. The **Picture Link screen** will display. **Click the Browse files button,** select the folder or file from the tree, **then click OK.**
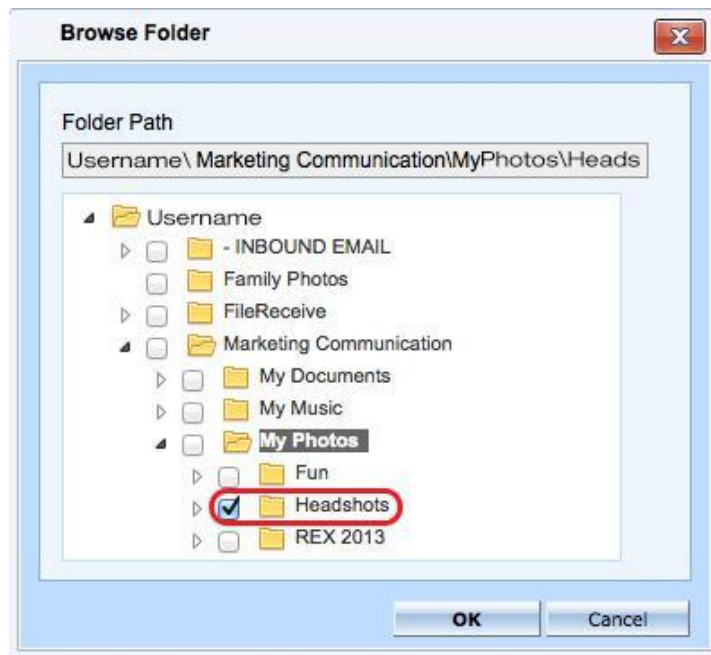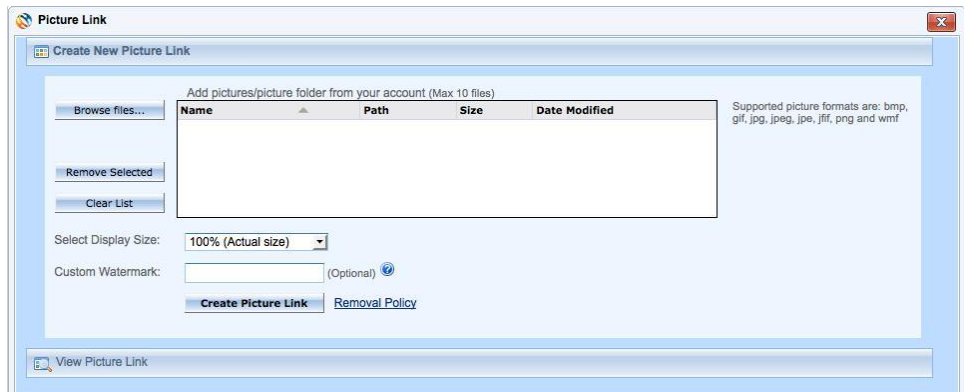
5. Choose the display size from the **Select Display Size drop-down menu.**

6. You may add a custom watermark in the text box. Custom watermarks may be whatever alphanumeric text you wish.

7. Click the Create Picture Link button. The picture links as well as image code for embedding will display. You may choose to try the link before copying and distributing by clicking the **Try Link button.**

(iv) Send Local Files

Send Local Files

You can also upload and email local files in one screen. **Click the Send Local Files button, select your destination folder, click the Add Files button** and **choose the file(s) you wish to upload** and **send.** The final step is adding recipient(s) email addresses. When you **click Send,** FileAssist takes care of uploading the file and emailing the **FileShare Link** in just one step. Once complete, click the destination folder to view your uploaded file.

a. Sending a Local File

Want a quick way to send a local file and upload it to your FileAssist account? Use the **Send Local Files feature!** In just a few clicks, you can select a file on your local machine, create a **FileShare Link** and safely store your data in the cloud. Just follow the instructions below, or find more information on sharing files in one of these helpful articles:

- Creating **FileShare Links**
- Creating **FileReceive Links**
- Esend
- Picture Links
- Creating a **GroupShare**
- Sending a Fax (Optional)

start

Let's Get Started:

1. Login to your account and **open the Share tab.**

2. Click the Send Local Files button in the **Share and Receive section.**
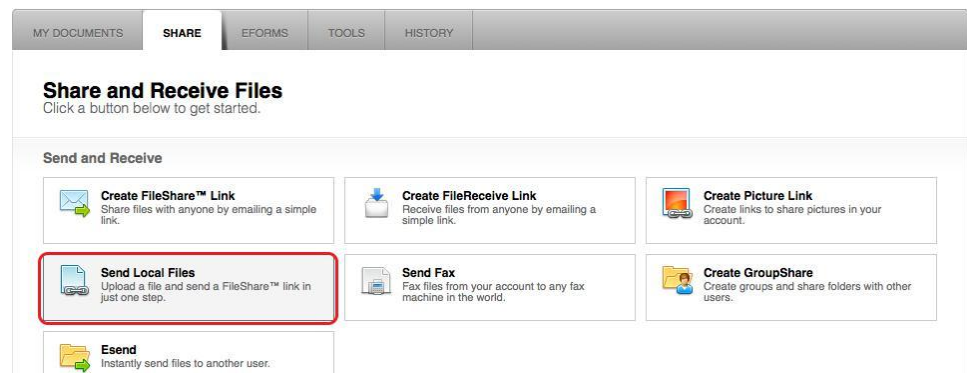
3. The Share a Local File screen will display. Select the destination folder for your local file by clicking the Browse button.
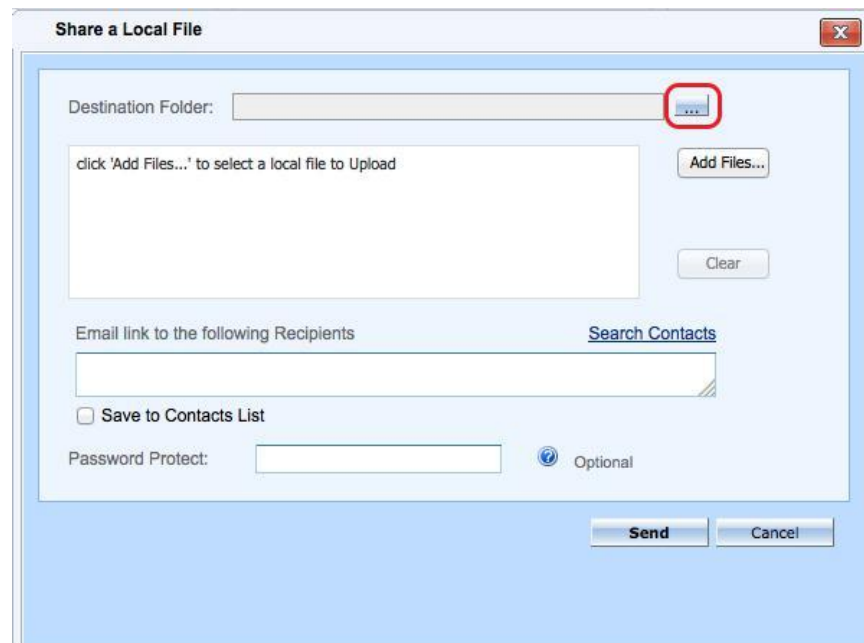
4. Click the destination folder and **then click OK.**
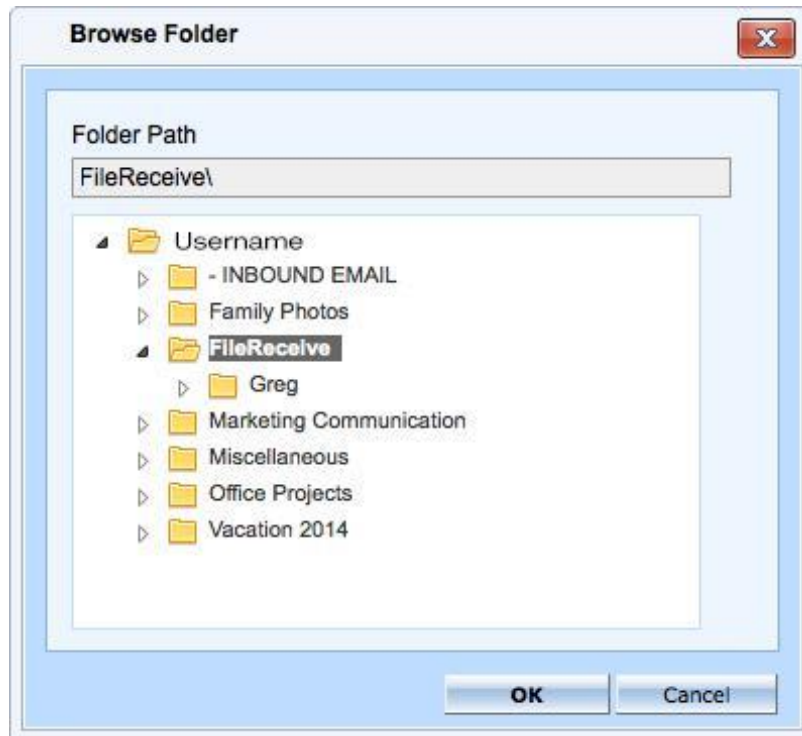
5. Now click the Add Files button to begin adding the local file(s) you wish to upload and share.
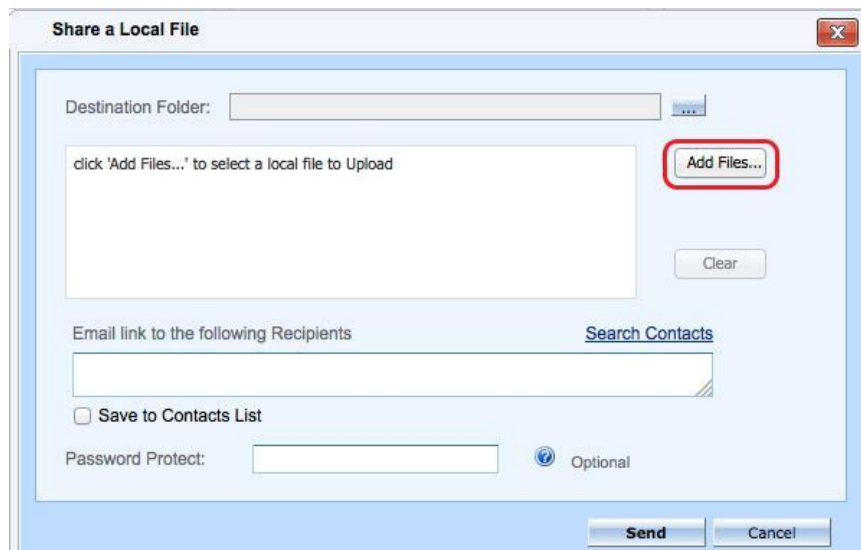
6. Enter the email address(es) of the FileShare Link recipients. You may choose to save the email address(es) for future use by clicking the Save to Contacts checkbox.

7. Enter a password if you wish to password protect the FileShare Link and then click the Send button.
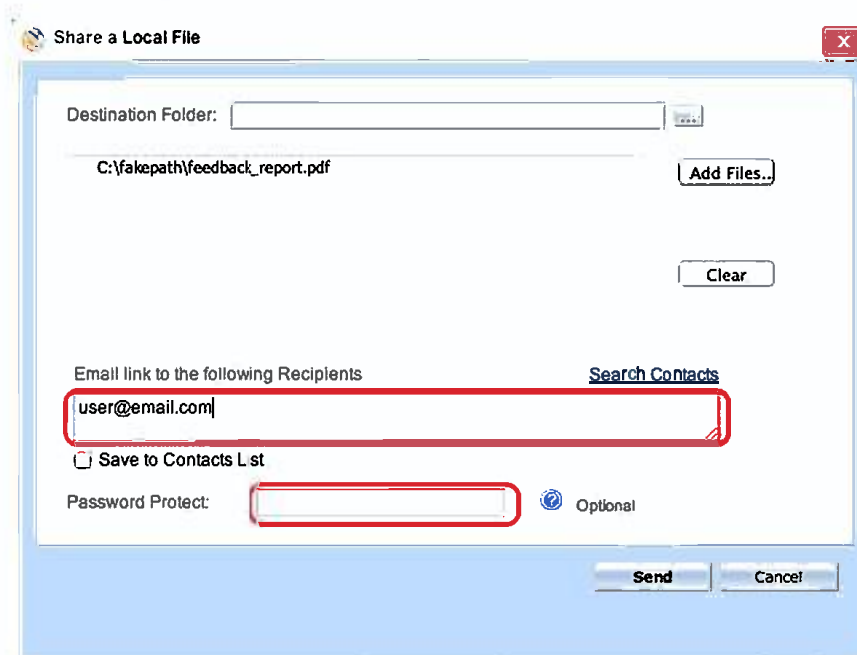
8. You'll receive confirmation that your FileShare Link was email to the recipients.
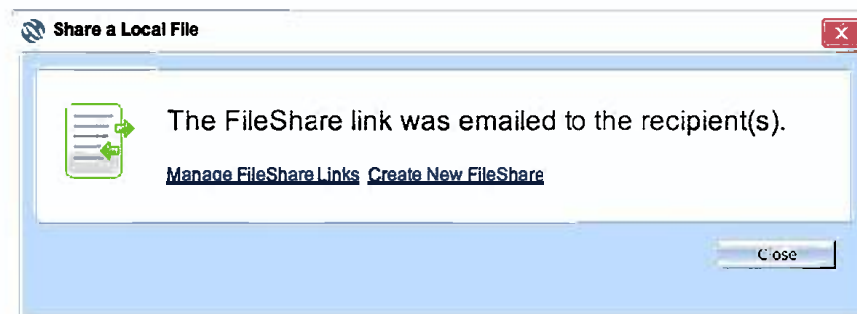
(vi) GroupShare™

GroupShare™

Create GroupShare
Create groups and share folders with other users.

GroupShare™ is a powerful tool that allows you to share folders and collaborate with other FileAssist users. Available on Personal accounts, simply select the folder you wish to share and click the **GroupShare™ button.** A prompt allows you to add users and individually assign permissions so that you can regulate the way data is shared. You may also change these settings at any time to allow more or less access to shared folders.

a. Creating a GroupShare™

Features, you want them, we have them! And one of the coolest is the **GroupShare™** feature. By creating a **GroupShare™,** you can provide access to the contents of entire folder(s) with other users. With options that allow you to control the way your data is shared, you can create just the right collaborative environment.

start

Let's Get Started:

You can access the **GroupShare™** feature one of three ways.

1. Click Share tab in the toolbar and then **select the Create GroupShare™ button.**
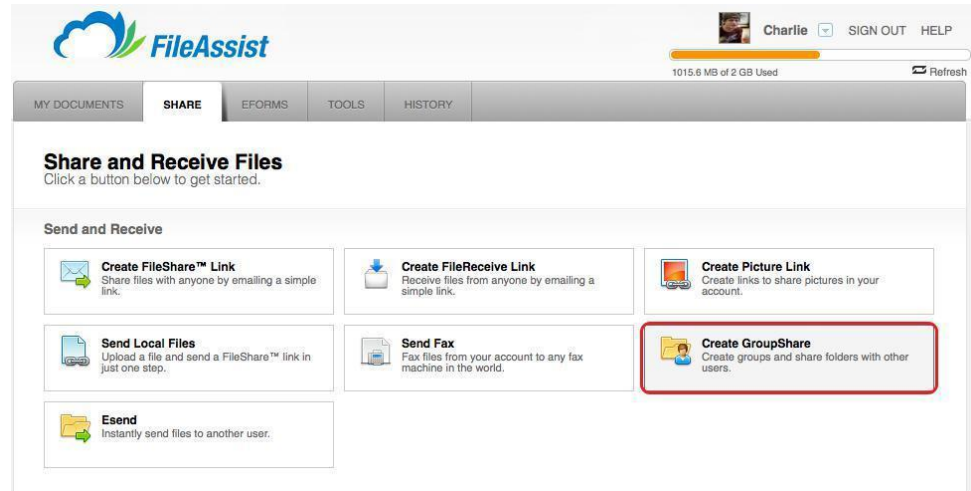
OR

2. Click on the folder you'd like to share, right click and **select GroupShare™.**
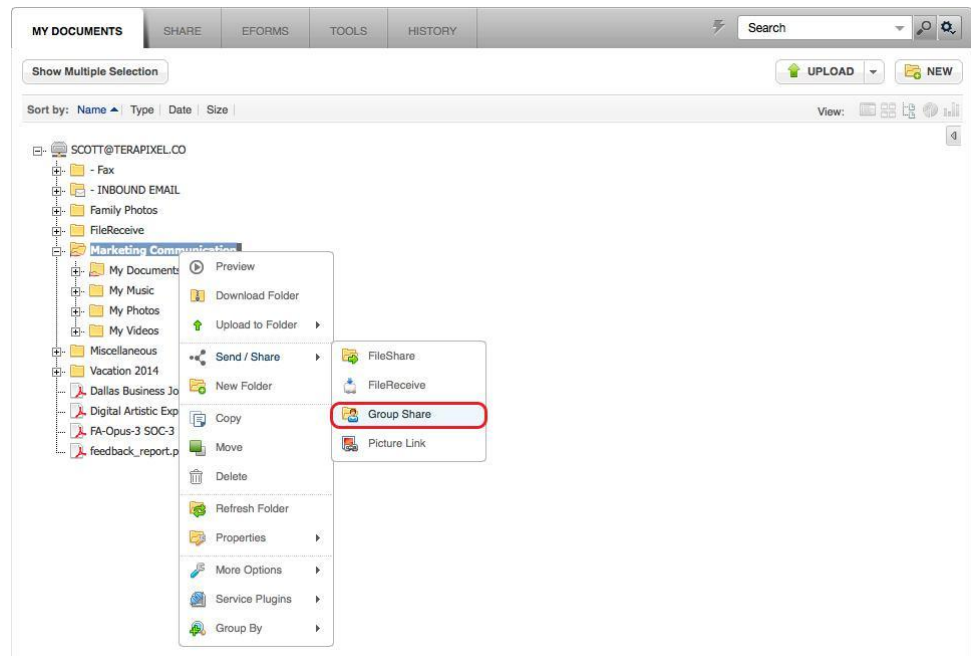
- Any of the above methods will prompt the FileAssist **GroupShare™ screen** (fields in this screen are discussed in detail below).

- Select the user(s) you wish to grant access by either entering the username in the **Share to field** or using the **Search Users function.**

- Assign the appropriate permission level, **then click the Add User button.**
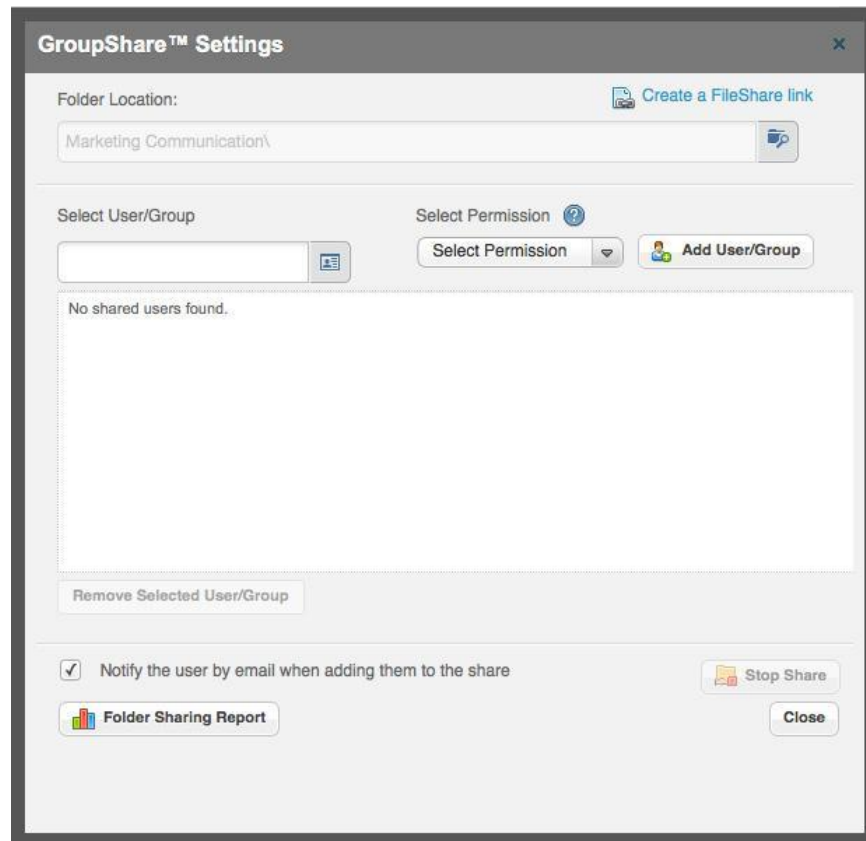
FileAssist GroupShare Screen Field Descriptions

Create a FileShare Link – Prompts the Create a **FileShare Link** screen.

Share Folder Field – Displays the folder highlighted to share.

GroupShare Notes Field – Optional open field. **GroupShare** notes appears in the
Folder Sharing Report.

Search Users Button – Opens your contact list to choose

Share to Field – Displays the user(s) the selected folder is shared with, or will be shared with.

Select Permission Menu – Drop-down menu that allows you to assign permission to the user(s) sharing
the selected folder. Selections are:

• Full Access allows user to view, create, update and delete files in the shared folder.

• Create and Update allows users to view, create and update files in the shared folder

• Read Only allows the user to only view files in the shared folder.

Remove Selected Users Link – Once a user is highlighted in the table, click the Remove Selected Users
to remove them from the **GroupShare.**

Notify the User by Email When Adding Them to the Share Checkbox – Enable this feature by
clicking in the checkbox and the user added to the **GroupShare** will receive a notification email.

Stop Sharing Folder Button – Clicking the **Stop Sharing Folder button** stops sharing the selected
folder with all user(s) associated with the **GroupShare.**

Folder Sharing Report Button – Exports Excel spreadsheet to your local machine.

b. Creating a GroupShare™ in Different Views

From the My Documents tab. Select a method from the list below:

List View

Click the mail icon with a small green arrow as shown in red below.
Click the GroupShare™ tab that appears below.
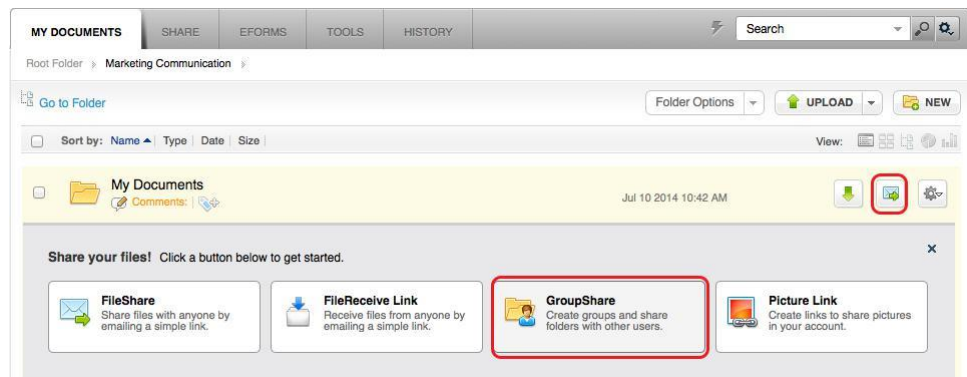
Icon View

Hover over a folder icon and **click the downward facing arrow** that appears in the top right hand corner. **Scroll down to Send/Share a**nd **select GroupShare™.**
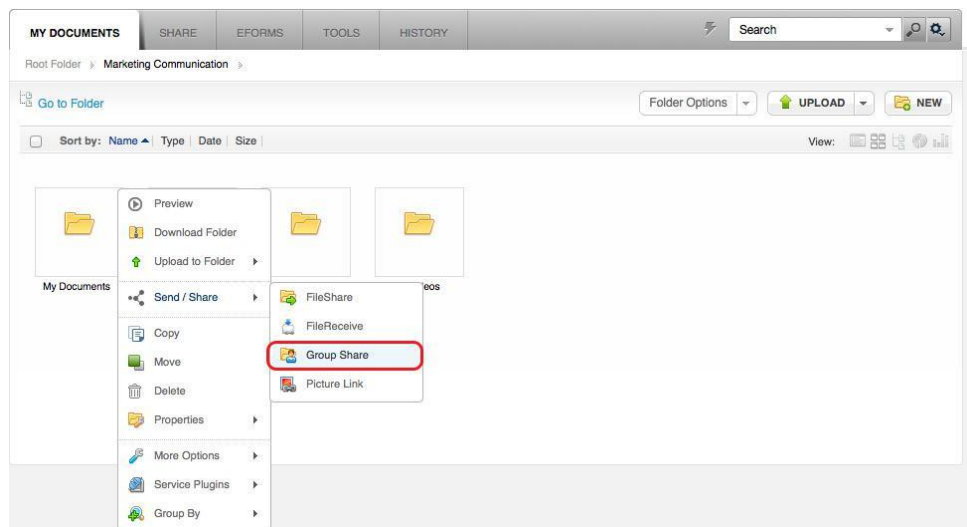
Tree View

Right click on a folder, scroll down to Send/Share and **click GroupShare™.**
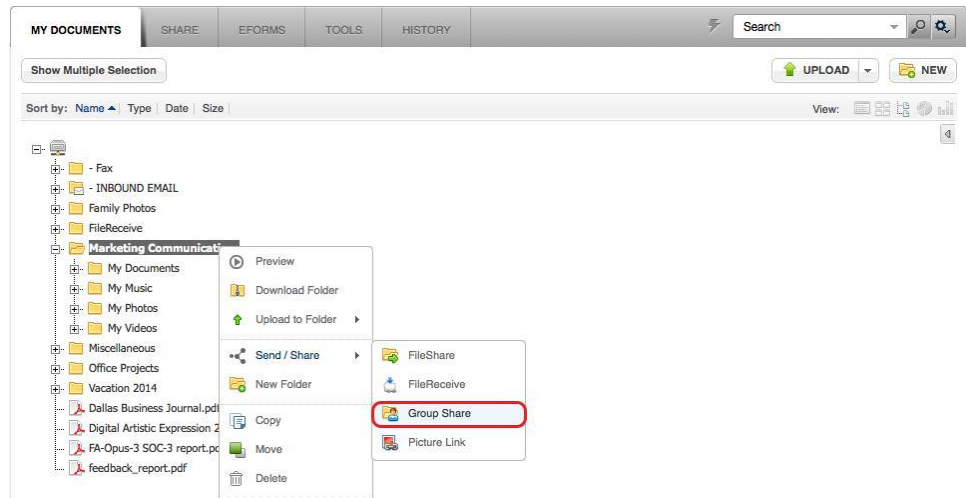
Chart/Bar View

Click the Folder Options menu, scroll down to Send/Share and **click GroupShare™.**
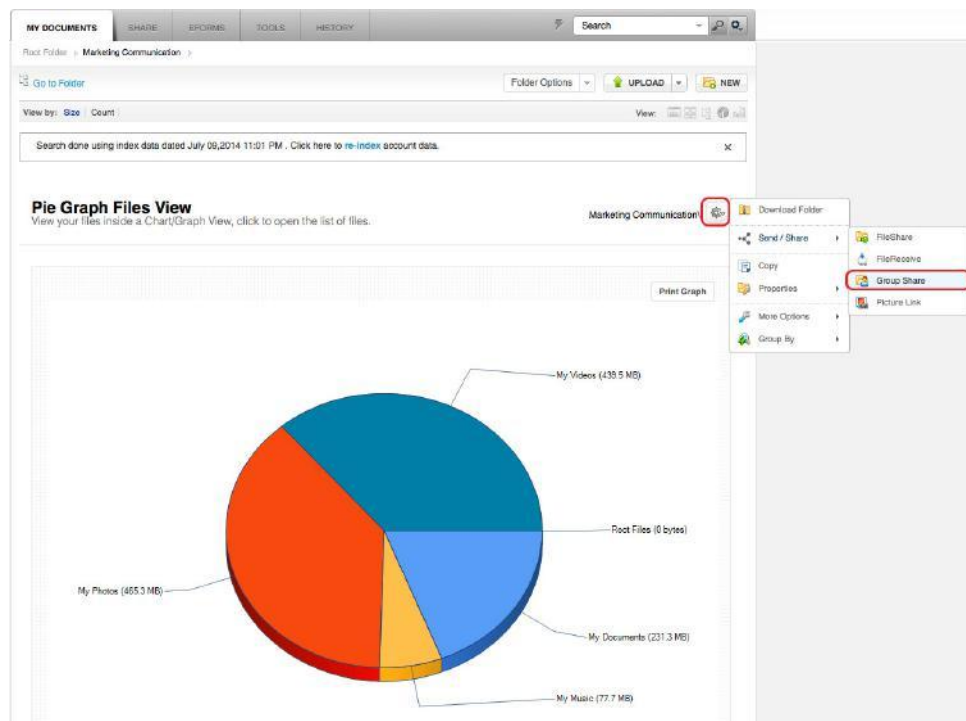
From the Share tab.

1. Open the Share tab and **click Create GroupShare™.**
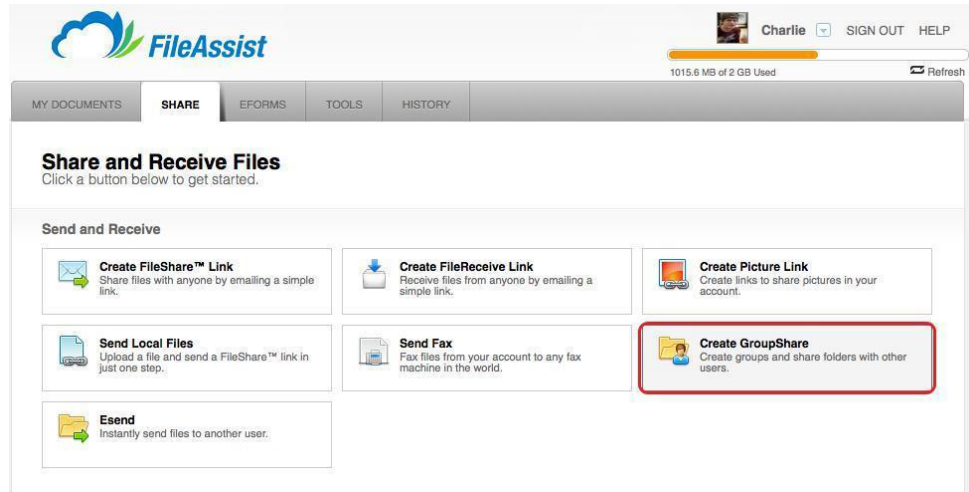
2. Click the Search Folder icon circled in red below to select a folder to GroupShare™.
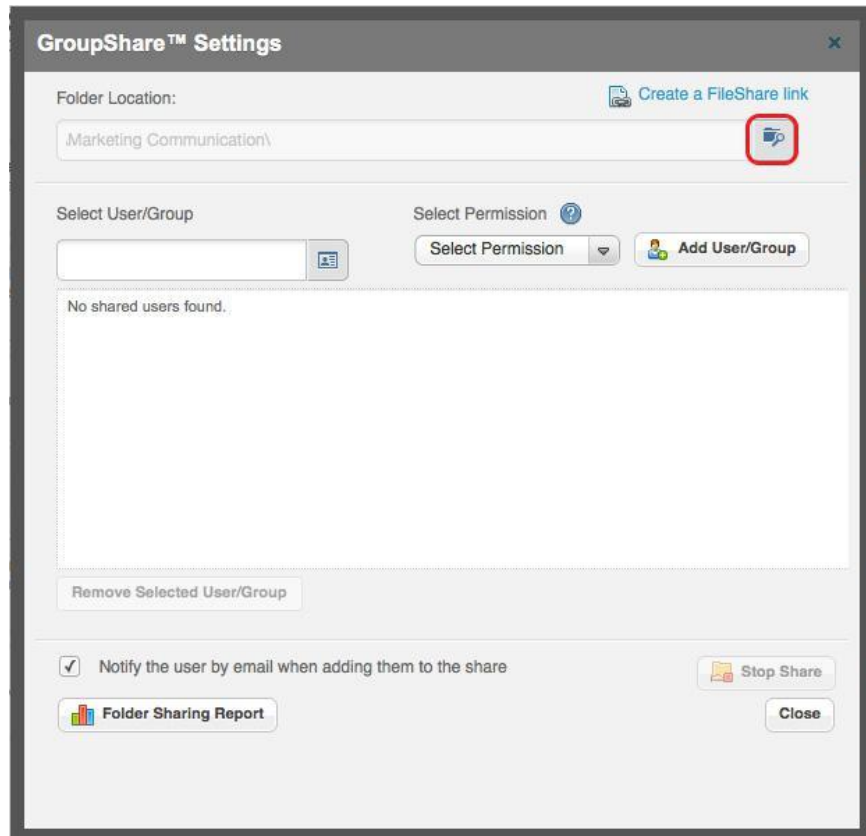
3. Select a folder from the list in the window that appears and **click OK.**
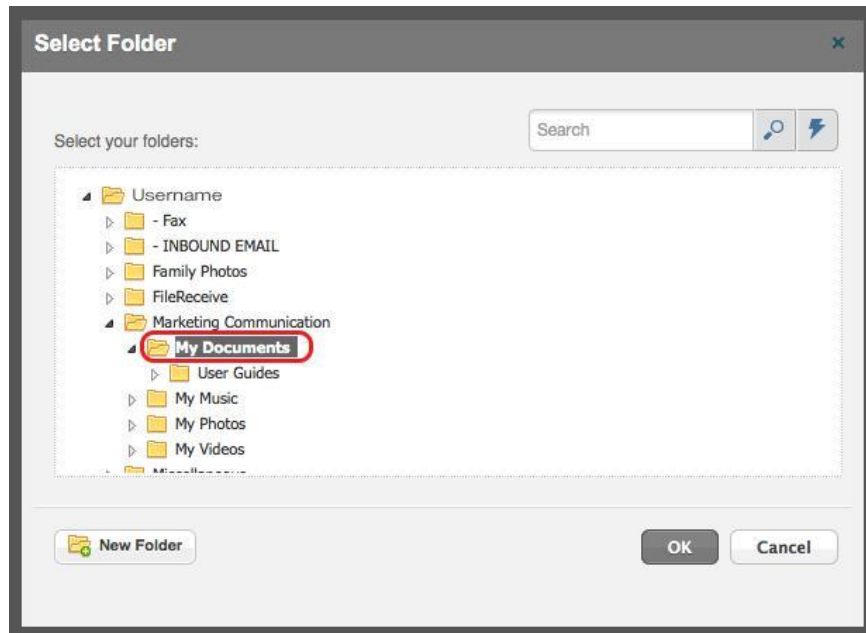
4. **Click the Contacts icon** circled in red below to select user(s) to send a **GroupShare™.**
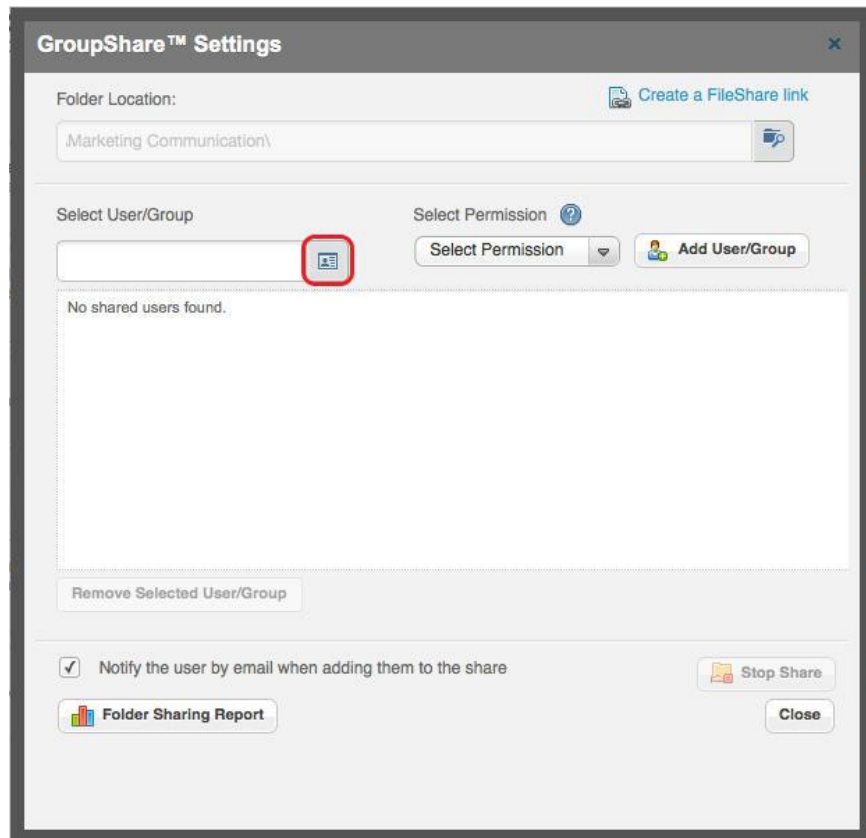
5. Check the **empty box** next to all user(s) you wish to add to the **GroupShare™ list,**
  then click Add Selected Users & Close.
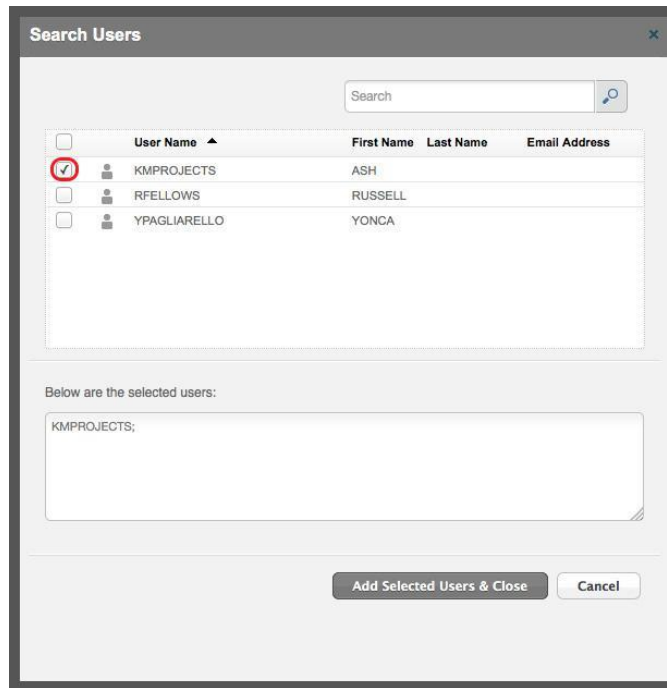
6. Select a permission level for the user(s).

Full Access – User has full access to **GroupShare; FileShare** and **GroupSharing** not allowed.

Create and Update – User only has create and update privileges; deletion is restricted.

Read Only – User may only view files.

Master Access – User has equal access to folder as owner; **FileShare** and **GroupSharing** allowed.

7. Click Add User/Group to send the **GroupShare™,** then click Close.

c. GroupShare™ Access Permissions

When creating a **GroupShare** the folder owner may denote varying levels of access to more efficiently guide the company's workflow or the user's needs while simultaneously protecting their data.
There are six levels of permission which are explained in detail below.
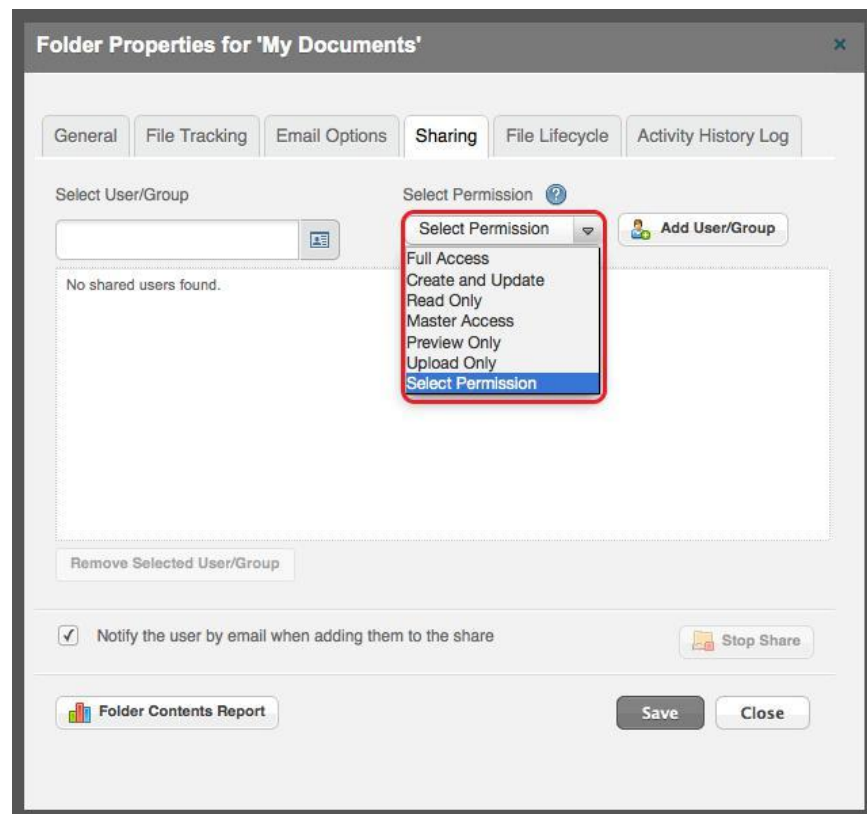
Full Access – Allows users to view, create, update and delete files in the shared folder. This provides general access and usability of the folder, though it prevents the folder itself from being shared and the recipient is unable to modify the folder settings.

Create and Update – Allows users to view, create and update or edit files in the shared folder.
The recipient is unable to download files (modifications are done through the Zoho Editor).

Read Only – Allows users to view files in the shared folder and download the files. Users are unable to upload, edit, or modify the folder or its contents.

Master Access – Grants the users access equivalent to the folder owner's; able to share the folder themselves and modify the folder settings.

Preview Only – Prevents users from downloading any type of the file, though they are able to view them using the FileAssist previewer.

Upload Only – Only allows users to upload the files. They are unable to preview, download, or edit them.

FileAssist

(vii) Esend
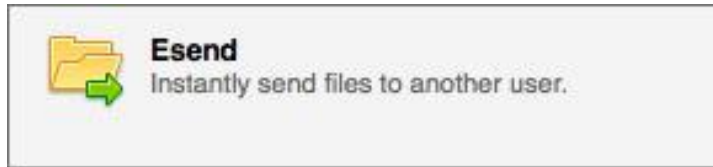
Esend

The Esend option is a highly secure data transfer between FileAssist user accounts. No data is transferred over the Internet, but rather behind our firewall. All that's required is the selection of files and the recipient's FileAssist username. The selected files are copied to the recipient's Inbox and an email notification lets them know that new files have arrived. Esend delivery is instant and supports any file size (as long it does not exceed the recipient's maximum storage available.

NOTE: Files may only be transferred to accounts of the same type, e.g. personal paid to personal paid.

a. Sending Files with Esend

Esend allows a user to directly send files from one account to another account without requiring any downloading or uploading.

NOTE: You can only Esend files to another account of the same type; personal to personal.

start

Let's Get Started!

1. Login to your account, **click Share** and **select Esend.**
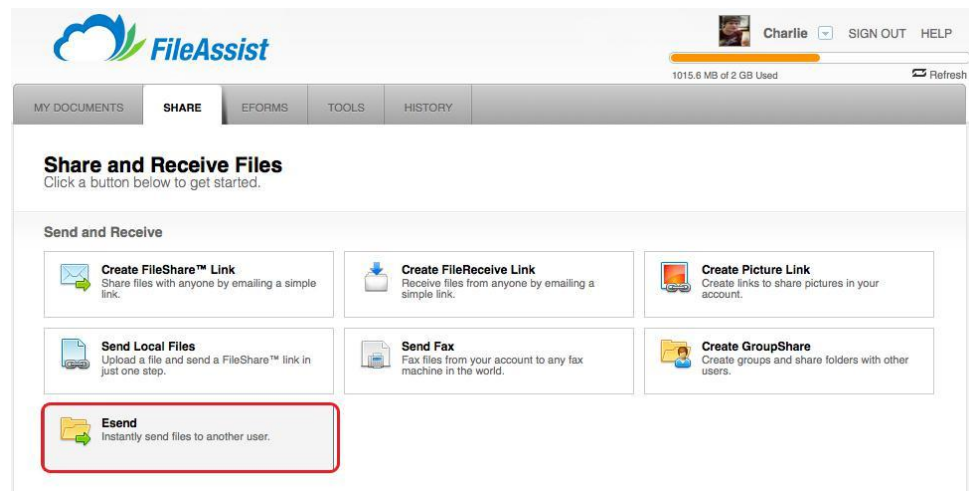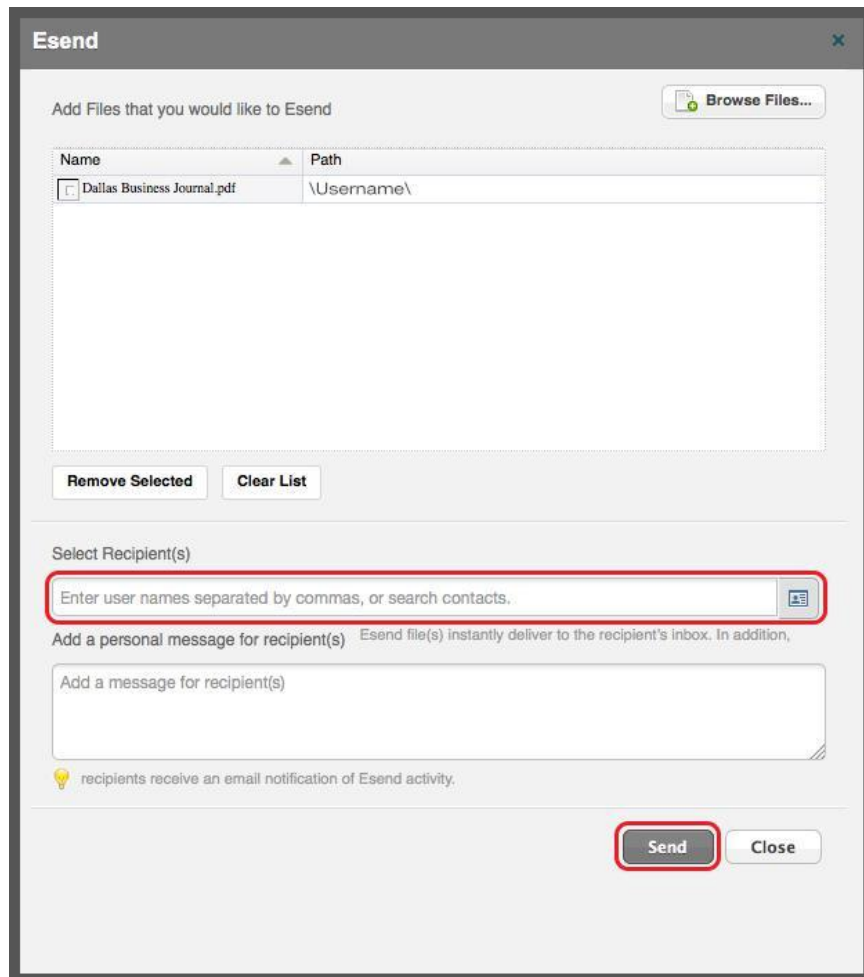
2. A popup window will appear. **Click Browse Files** in the top right hand corner.
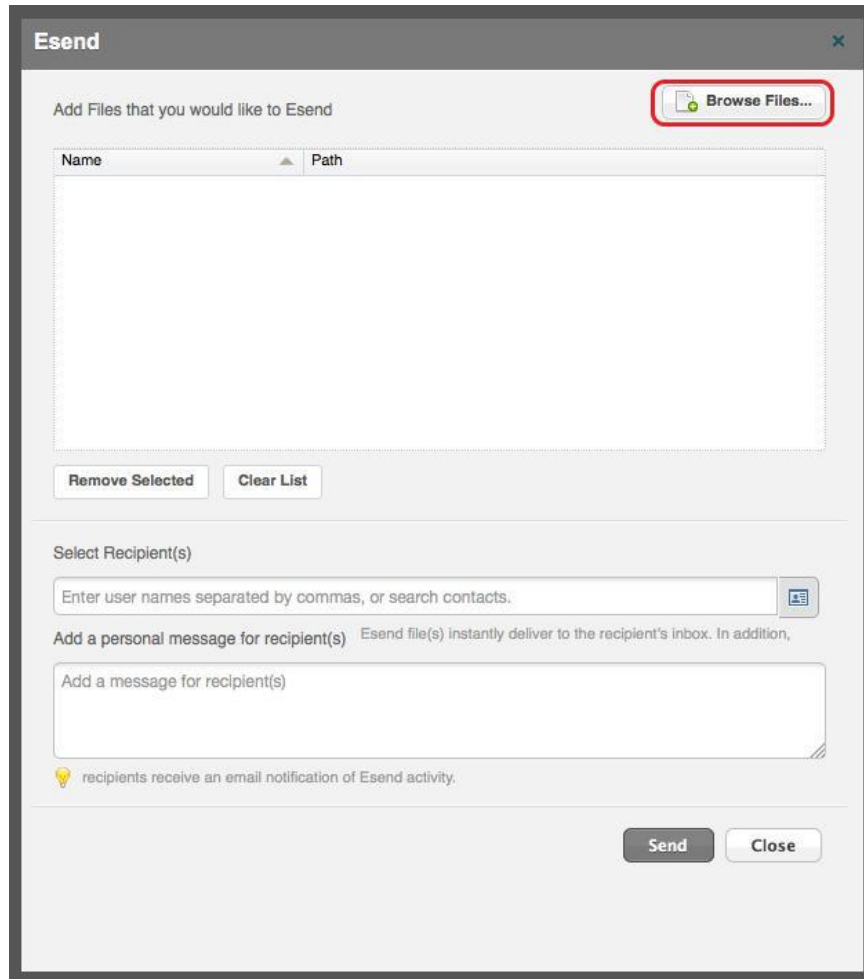
3. **Select the files** you would like to send to another account.
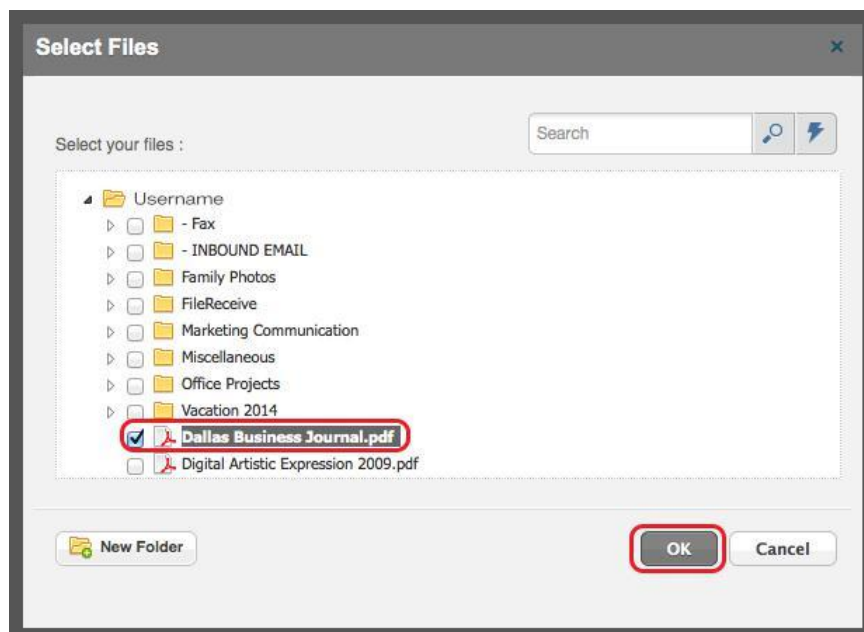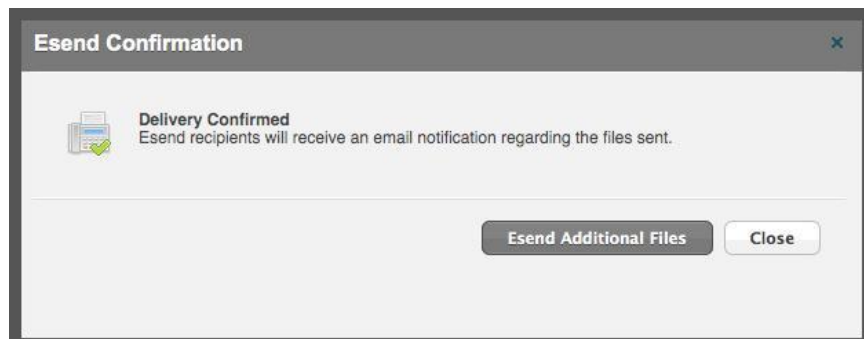
4. Type in or use the contacts button to select the recipient(s) and add a personal message for the recipients if you want.

5. Once you **hit send** you will **receive a confirmation message.** You can send additional files or you can close the window.

iii. Manage

(i) FileShare Links

a. Active FileShare Link Log

Your FileAssist account gives you the ability to share an almost endless number of files. That's a lot to keep up with! Luckily, we thought of that and provided a **FileShare History Log** that neatly sorts all your active **FileShare Links.** In addition, the log allows you to edit, view, generate and check link history all from a single screen.

You may also be interested in more information on:

- Creating **FileShare Links**
- **FileShare Link** Distribution Methods
- **Advanced FileShare Link Features**
- Modifying a **FileShare Link**
- **File History Log**
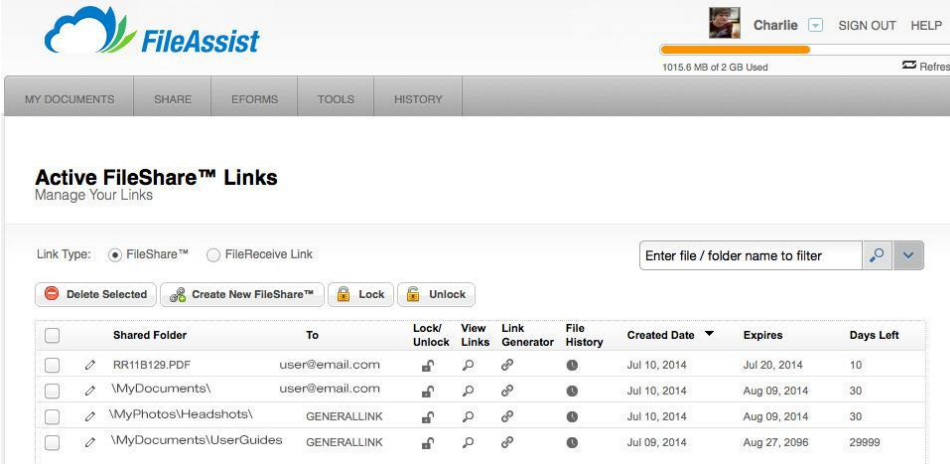
View and Manage Active FileShare Links

The **FileShare** log organizes all active **FileShare Links** and allows you to **Edit, View, Generate** and **Check Link History** all from a single screen. To access the log:

1. From the main screen of the User Interface **click the Share tab.**

2. Click FileShare Links under the **Manage section.**

Toolbar and Field Descriptions in the Active FileShare Log

Toolbar

Delete Button – Deletes the files selected in the table.

Create New FileShare Button – Gives you the **FileShare screen** to create a new **FileShare Link.**

Lock Button – Immediately locks the selected link and prevents access by link recipients.

Unlock Button – Immediately unlocks the selected link and allows access by link recipients.

Fields

Checkboxes – Clicking in a checkbox selects the **FileShare Link** and all fields associated with it. The top checkbox acts as a **Select All feature** and will select all **FileShare Link** and their associated fields with just one click.

Link Type – Choose from **FileShare Link, FileReceive Link,** or filter your results by entering criteria in the Filter by File/Folder Name.Ex: field.Edit

Shared Folder – Provides the file path to the folder from which the file was shared.

To – Provides a description of link recipients.

View Links – Prompts a **FileShare Link screen** and displays the associated recipient(s)/**FileShare Link(s).**

Link Generator – Gives you the option to send the associated **FileShare Link** to additional recipients without going through the **FileShare Link** process again.

File History – Prompts the File History Log for the associated **FileShare Link.**

Created Date – Sortable field that displays the date the link is created.

Expires – Sortable field that displays the date the link is set to expire.
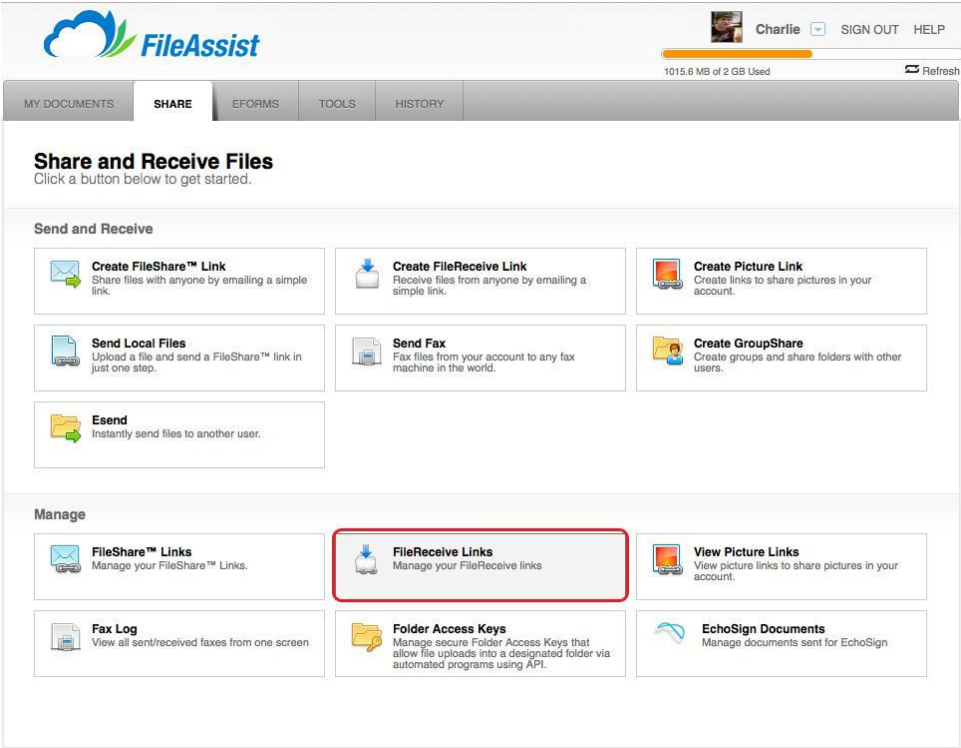
b. Modifying a FileShare Link
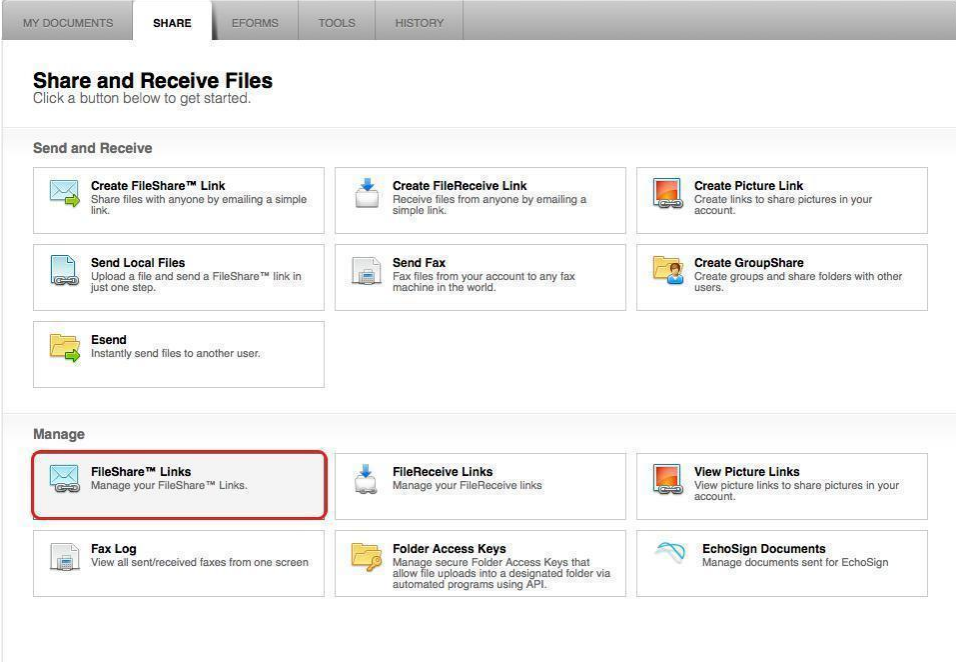
Did you recently create a **FileShare Link,** then find that you need to change it? No problem! **FileShare Links** can be modified if you need to extend an expiration date, send it to additional folks, or even lock the file from further access. Just follow these simple instructions. You may also be interested in reading more about:

- Creating **FileShare Links**
- **FileShare Link** Distribution Methods
- **Advanced FileShare Link Features**
- Active **FileShare Link Log**

start

Let's Get Started:

1. From the main screen of the User Interface **click the Share tab.**

**2.** Click **FileShare Links** under the **Manage section.**

| MY DOCUMENTS | **SHARE** | EFORMS | TOOLS | HISTORY |

Share and Receive Files
Click a button below to get started.

Send and Receive

Create FileShare™ Link Share files with anyone by emailing a simple link.	**Create FileReceive Link** Receive files from anyone by emailing a simple link.	**Create Picture Link** Create links to share pictures in your account.
Send Local Files Upload a file and send a FileShare™ link in just one step.	**Send Fax** Fax files from your account to any fax machine in the world.	**Create GroupShare** Create groups and share folders with other users.
Esend Instantly send files to another user.		

Manage

| **FileShare™ Links**
Manage your FileShare™ Links. | **FileReceive Links**
Manage your FileReceive links | **View Picture Links**
View picture links to share pictures in your account. |
| **Fax Log**
View all sent/received faxes from one screen | **Folder Access Keys**
Manage secure Folder Access Keys that allow file uploads into a designated folder via automated programs using API. | **EchoSign Documents**
Manage documents sent for EchoSign |

Toolbar and Field Descriptions in the Active FileShare Log

Toolbar

Link Type – Choose from **FileShare Link, FileReceive Link,** or filter your results by entering criteria in the Filter by File/Folder. Ex: Name: field.Edit

Delete Selected Button – Deletes the files selected in the table.

Create New FileShare Button – Gives you the **FileShare Link** screen to create a new **FileShare Link.**

Lock Button – Immediately locks the selected link and prevents access by link recipients.

Unlock Button – Immediately unlocks the selected link and allows access by link recipients.
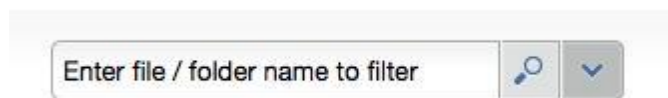
Search/Filter – Use this box to filter or search for links associated with particular files or folders.

Fields

Checkboxes – Clicking in a checkbox selects the **FileShare Link** and all fields associated with it. The top checkbox acts as a **Select All feature** and will select all **FileShare Links** and their associated fields with just one click.

Pencil Icon – Clicking on this icon will edit that specific link.

Shared Folder – Provides the file path to the folder from which the file was shared.

To – Provides a description of link recipients.

Lock/Unlock – Clicking on this allows you to lock and unlock the **FileShare Link** at will. Locking a **FileShare Link** will effectively disable it until you unlock it.

View Links – Prompts a **FileShare Link screen** and displays the associated recipient(s)/**FileShare Link(s).**

Link Generator – Gives you the option to send the associated **FileShare Link** to additional recipients without going through the **FileShare Link** process again.

File History – Prompts the File History Log for the associated **FileShare Link.**

Created Date – Sortable field that displays the date the link is created.

Expires – Sortable field that displays the date the link is set to expire.

Days Left – Sortable field that displays the number of days remaining before the link expires.

Log Activity – Displays a **green circle** when **File History is enabled** and displays a **red circle** when **File History is not enabled.**

Email Notification – Displays a **Y** when an email notification has been sent to the recipient(s), and an **N** when an email notification has not been sent to the recipient(s).

Editing an Existing FileShare Link

Click on the Pencil icon of the link you wish to edit. This prompts the **FileShare Link screen** and provides you with multiple options for modifying the **FileShare Link.** Select the changes you wish to make to the link and **then click the Save button.** An explanation of each tab, appears below.
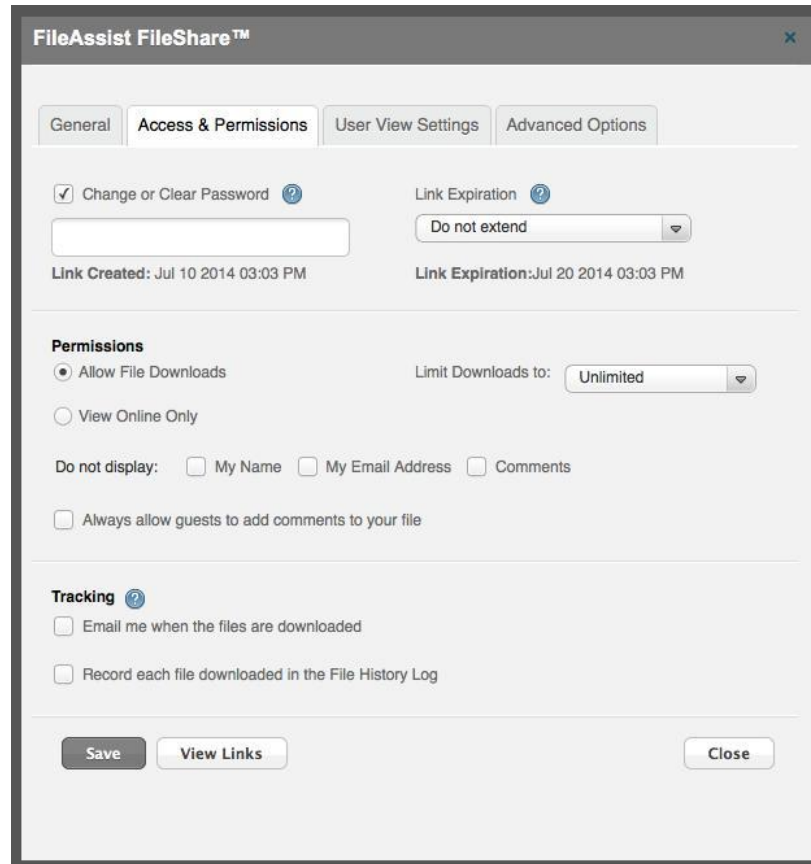
General Tab

The General tab provides you with the option to add/remove files and/or folders that are being shared.
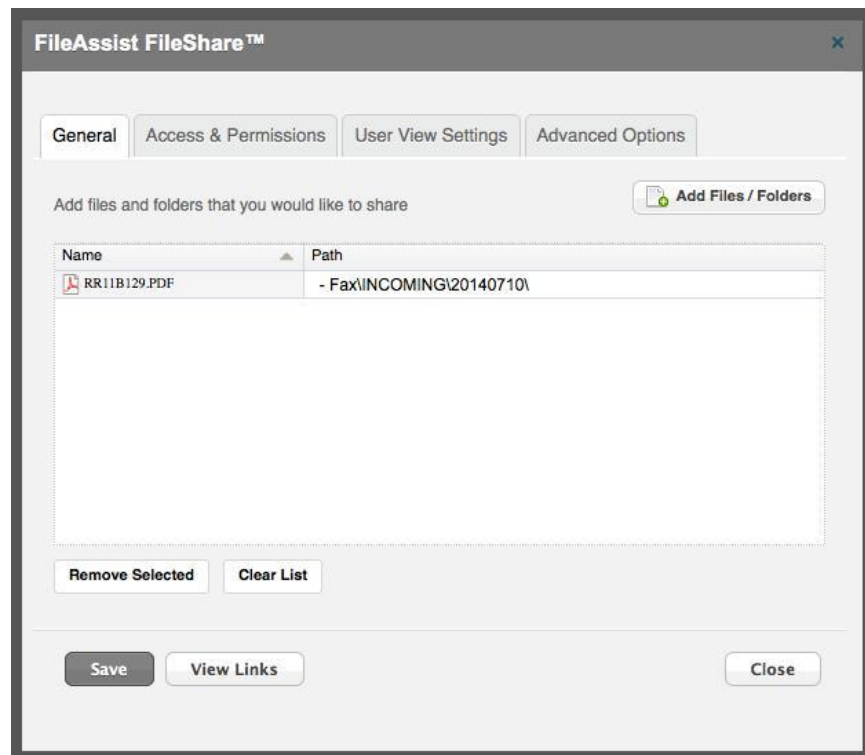
Access & Permissions Tab
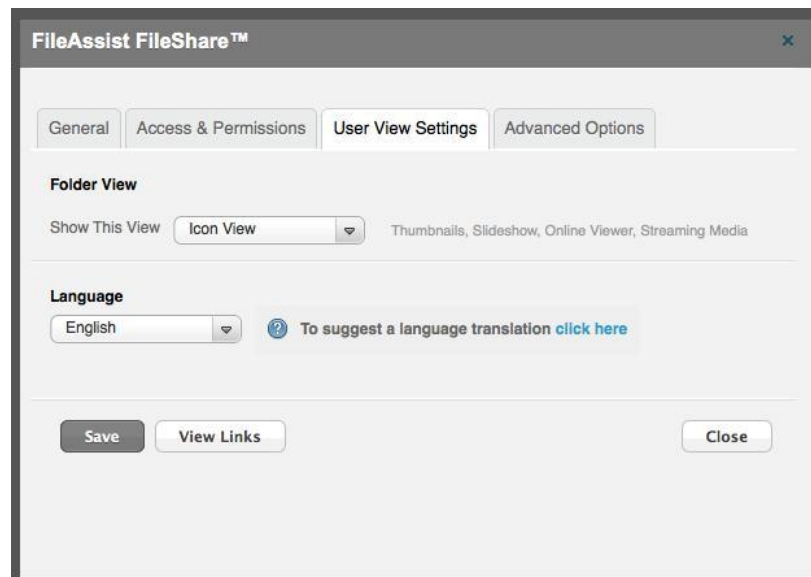
With the **Access & Permissions tab,** you have the options to edit the View, enable or disable password protection on the link and modify link expiration dates. You may also limit the number of file downloads per recipient, disable downloads of files by selecting **View Online Only,** change the way the link notification displays your information, or enable tracking features.

User View Settings Tab

This tab allows you to change the default view and language of the **FileShare Link.**

Advanced Options Tab

This tab allows you to designate a cover page to display a message, require verification from the recipient, or require a signature. It also allows you to apply a return URL. If enabled, the **Sign Out button** will take the recipient to the designated URL.

IMPORTANT INFORMATION ABOUT FILESHARE LINKS

- The Send Link feature does not send a notification email to the creator of the **FileShare Link.** If you wish to receive and view the **FileShare Link** notification that your recipients will see, you must include your email address with the other recipient email addresses where prompted.

- If your email server doesn't use SSL to send emails, you may want to use either the **Send Link or Password Protect feature.** Send Link uses FileAssist built-in, secure email system. Password protect allows link access via 128-bit SSL encryption.

(ii) FileReceive Links

a. Active FileReceive Links Log

It so easy for friends, family and associates to share files of any size using **FileReceive Links,** you'll probably find yourself using it a lot! But that's a lot of links to keep up with! Good thing we thought of that and created the **Active FileReceive Link Log.** With the ability to **View, Manage** and **Edit FileReceive Links, the Active FileReceive Link Log** just might become your BFF! Here you'll find instructions to use the log and you might also be interested in more information on:
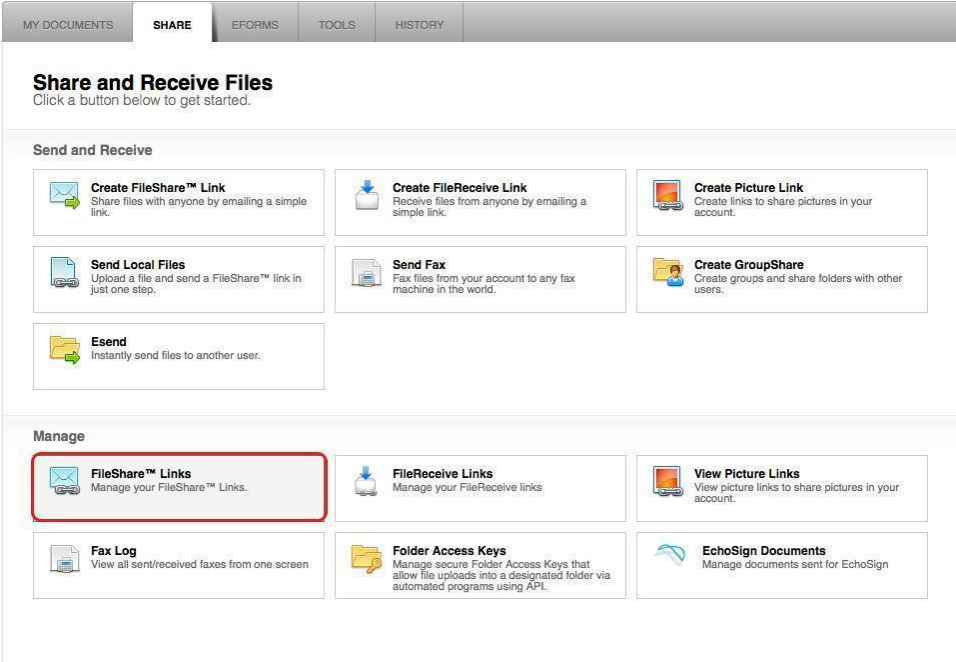
- Creating **FileReceive Links**
- Sharing Files with **FileReceive Links**
- Accessing **FileReceive Folders and Files**
- Advanced **FileReceive Folder** and **Link Features**
- Modifying **FileReceive Links**
- **FileReceive Link** Distribution Options

View and Manage Active FileReceive Links

The **FileReceive Link tab** organizes all active **FileReceive Links** and allows you to **Edit, View, Generate** and **Check Link History** all from a single screen. To access the log:

From the main screen of the User Interface click the **Share tab** and then **click Create FileReceive Link.**

Toolbar and Field Descriptions in the Active FileReceive Log

Toolbar

Link Type – Choose from **FileShare Link, FileReceive Link,** or filter your results by entering criteria in the Filter by File/Folder Name: field.

Delete Button – Deletes the files selected in the table.

Create New FileReceive Button – Gives you the screen to create a new **FileReceive Link.**

Lock Button – Immediately locks the selected link and prevents access by link recipients.

Unlock Button – Immediately unlocks the selected link and allows access by link recipients.

Fields

Checkboxes – **Clicking in a checkbox** selects the **FileReceive Link** and all fields associated with it. The top checkbox acts as a **Select All feature** and will select all **FileReceive Links** and their associated fields with just one click.

Edit – Allows you to edit the associated **FileReceive Link.**

Shared Folder – Provides the file path to the folder from which the file was shared.

To – Provides a description of link recipients.

View Links – Prompts a **FileReceive Link screen** and displays the associated recipient(s)/**FileReceive Link(s).**

Link Generator – Gives you the option to send the associated **FileReceive Link** to additional recipients without going through the **FileReceive Link** process again.

File History – Prompts the **FileReceive History Log** for the associated **FileReceive Link.**

Created Date – Sortable field that displays the date the link is created.

Expires – Sortable field that isplays the date the link is set to expire.

Days Left – Sortable field that displays the number of days remaining before the link expires.

Log Activity – Displays a **Y** when File History is enabled and displays a **N** when File History is not enabled.

Email Notification – Displays a **Y** when an email notification has been sent to the recipient(s), and an **N** when an email notification has not been sent to the recipient(s).

b. Modifying FileReceive Links

Did you recently create a **FileReceive Link,** then find that you need to change it? No problem! **FileReceive Links** can be modified if you need to extend an expiration date, send it to additional recipients, or even lock the file from further access. Just follow these simple instructions. You may also be interested in reading more about:

- Creating **FileReceive Links**

- Sharing Files with **FileReceive Links**

- Accessing **FileReceive Folders** and **Files**

- Advanced **FileReceive Folder** and **Link Features**

- Active **FileReceive Link Log**

- **FileReceive Link** Distribtion Options

start

Let's Get Started:

From the main screen of the User Interface **click the Share tab,** then **click the FileReceive Links button** under the **Manage section.**

OR

From the **FileReceive Link screen, click the Manage FileReceive Links button**
to access the **Active FileReceive Links Log.**
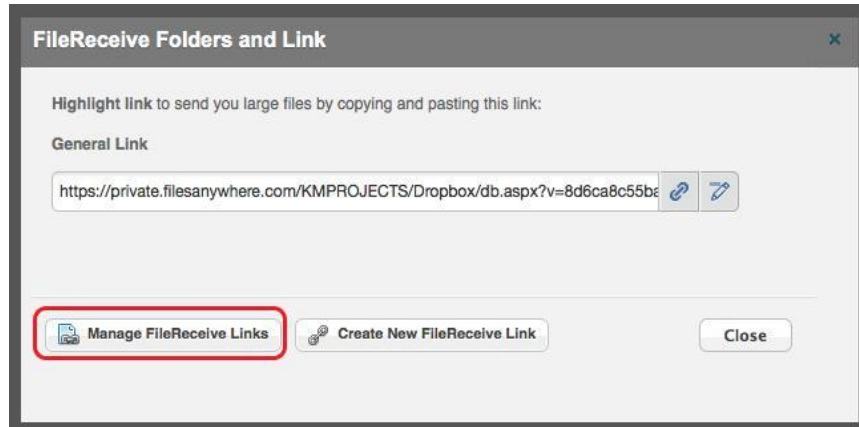
1. Select the **FileReceive Link** you wish to modify by **clicking the Edit button (Pencil icon).**
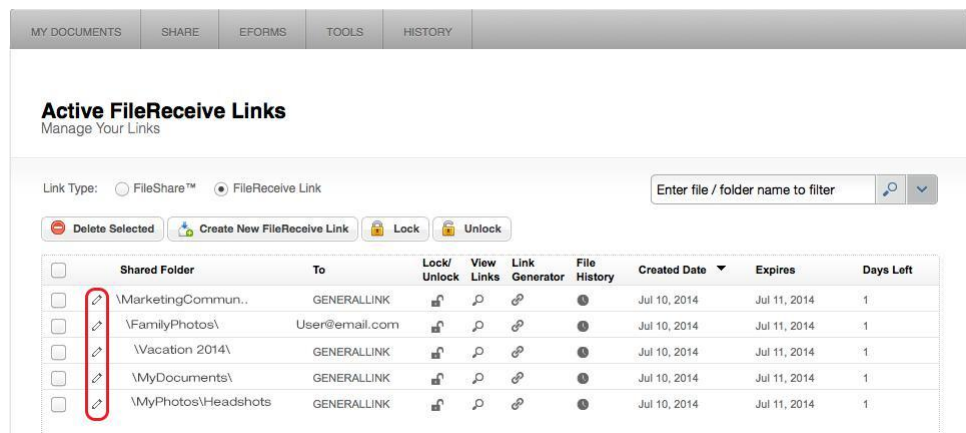
2. A window will appear giving you options for editing the **FileReceive Link.**

3. Make sure to **click the Save button** after making your changes.
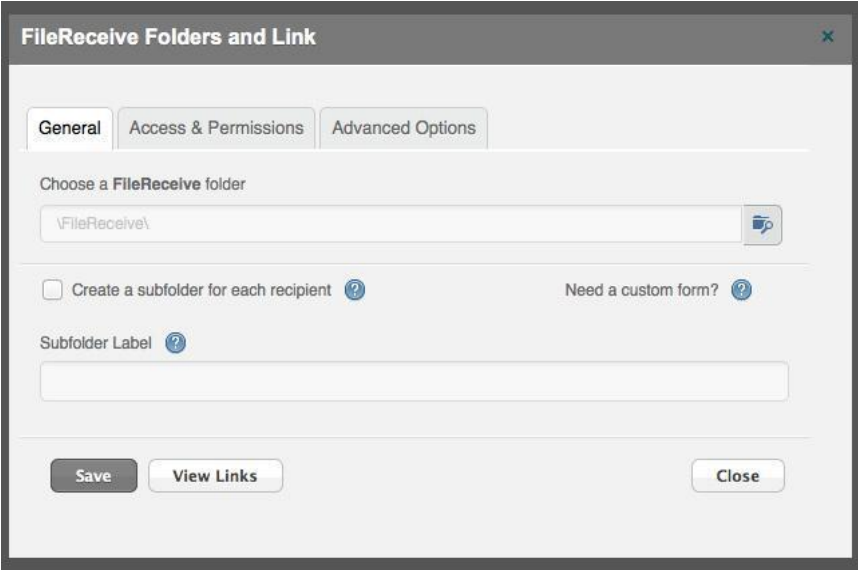
Options for Editing FileReceive Links by Tab

General Tab

Choose a Drop Folder Field – Displays the designated FileReceive Folder.

Create a Subfolder for Each Recipient Checkbox – **To enable, click the checkbox.** When enabled, dedicated folders will be created for each file sender. Or disable to let senders place files into your **FileReceive Folder.**

Display This Label Field – Allows you to create instructions for file sender's to name dedicated folders when the **Create a Subfolder for Each Recipient** is enabled. The default label is **Please Enter Your Name** but may be changed as you feel appropriate (the second screen shot shows the content designated in the Display This Label Field).

FileReceive Folders and Link

| General | Access & Permissions | Advanced Options |

Choose a **FileReceive** folder

\FileReceive\

☐ Create a subfolder for each recipient ?   Need a custom form? ?

Subfolder Label ?

Save   View Links   Close

Access & Permissions Tab

Change or Clear Password Checkbox – Allows you to enable or disable a password associated with the link you are editing.

Link Expiration Drop-Down Menu – Allows you to extend or shorten an expiration date on the link you are editing.

Permission Section

When enabled, new files uploaded to the **FileReceive Folder** will overwrite older files of the same name. If you need to retain versions of different files, then do not enable the overwrite function.

When enabled, allow users to upload entire folders, allows them to do just that through our bulk java uploader.

When the **Do Not Display** options are enabled, the information is removed from the **FileReceive Send by** field of your recipient's **FileReceive Link** notification email.

Tracking Section

Enable the **Keep File History Log of Each File Upload** to keep a history of files uploaded via **FileReceive Link.**

Enable the **Send Email on Each File Upload** to receive an email notification when files are uploaded to your **FileReceive Folder.**

Advanced Options

Select Language Section

The default selection allows **FileReceive Link** recipients to view windows in their language selection. You may also choose to enable a different language from the drop-down menu.

Return Button Section

The **Display a custom Return button** allows you to create a custom button and designate a return URL. When **FileReceive Link** recipients click the button, they are automatically directed to the URL you designate.

IMPORTANT INFORMATION ABOUT THE FILERECEIVE SERVICE

- Receive files of any size (up to the maximum free space on your account), allow email notifications to tell you when a file is dropped and access received files instantly.

- There is no limit on the number of files that may be uploaded via **FileReceive Link** and each file that is shared or uploaded can be of any size, up to the full storage size of your account.

- Only designated email contacts that you specify can send you files.

- SSL 128-bit encryption during the transfer for complete security.

- Files sent to you are already organized into the folder structure you have setup for storage.

- Guest senders are not required to sign up. The **FileReceive Service** is free for the guest sender and included in your FileAssist plan at no extra charge.

(iii) View and Edit Picture Links

To view and edit existing picture links **click on the Share tab** and then **click View Picture Links** in the bottom right corner, as seen in the picture below.
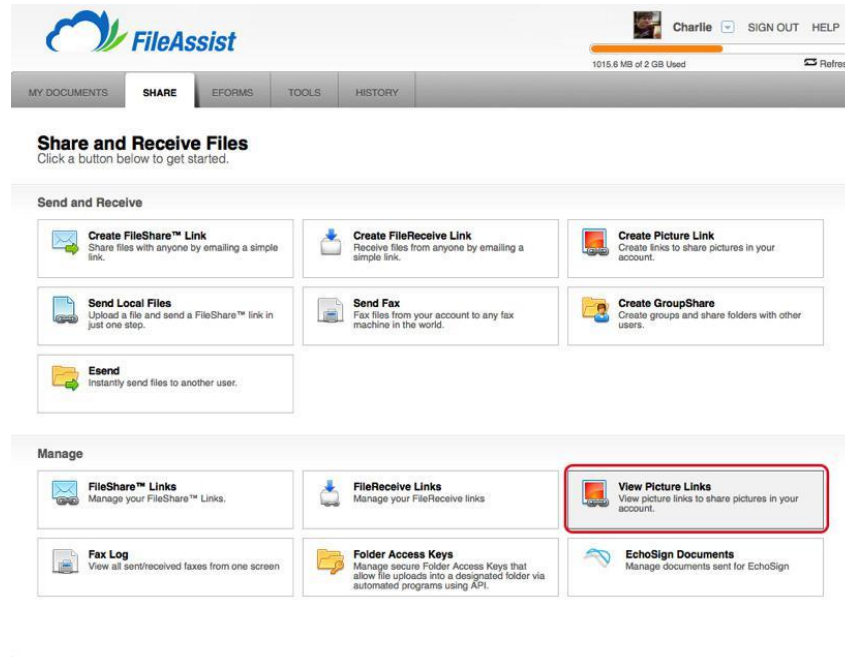
This will open a new window with a list of the different picture links created, their thumbnails, links for sharing and of course a **Create New Picture Link button** at the top of the window.
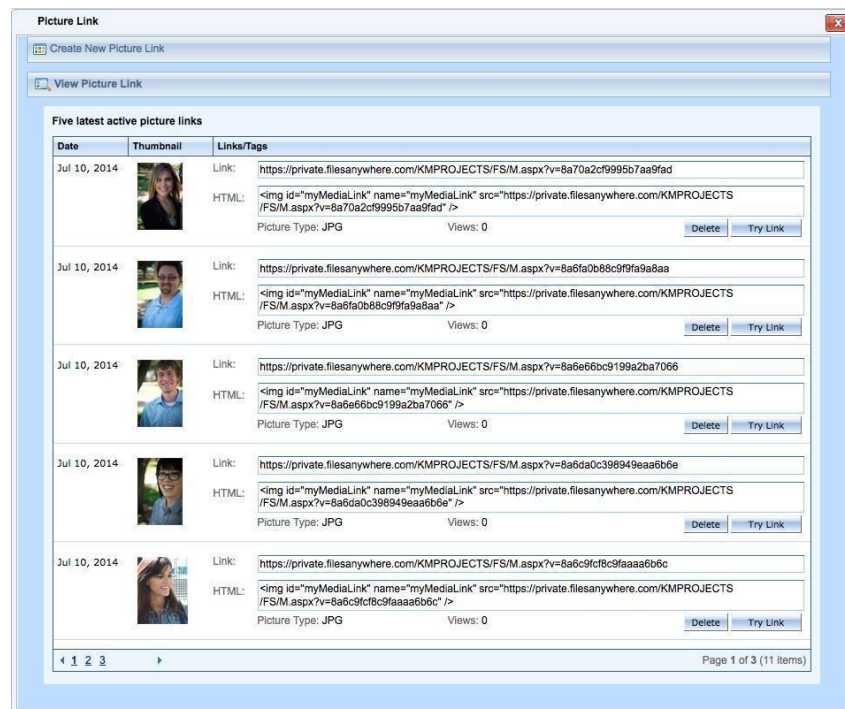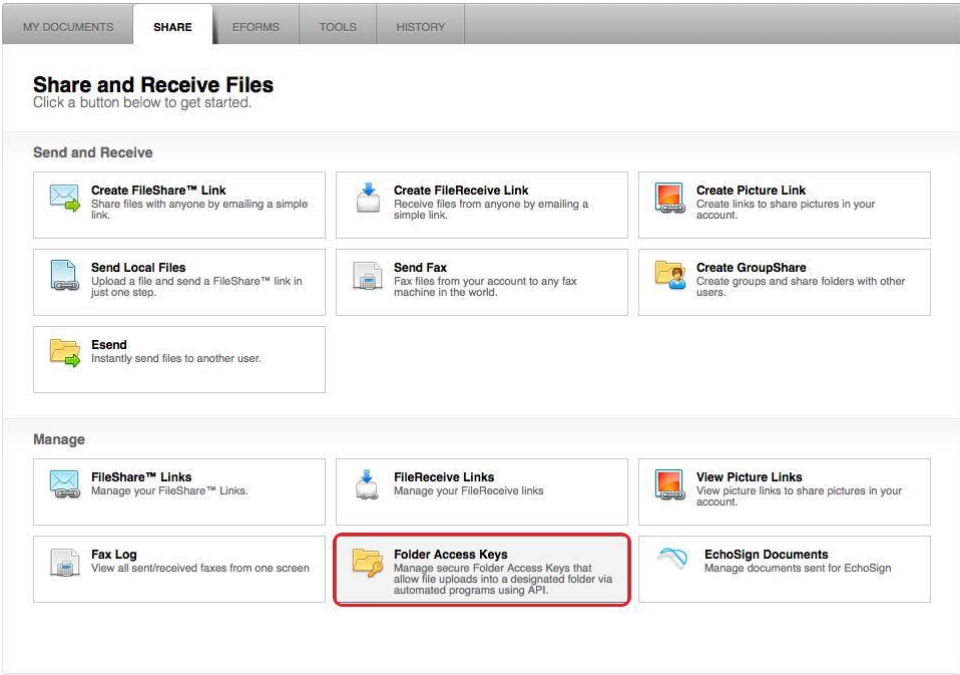
Click Try Link to view the image and **Delete** to remove the image. The links are available to share the image or embed it in HTML.

(v) Folder Access Keys

Folder Access Keys are useful for companies that use automated programs to upload data, like files or reports to a FileAssist account. These folders to not require a username or password because they are assigned a special key. This allows the automated program to reach out to this destination folder with the key and upload the files without requiring manual username and password entry. For example, employees may upload weekly reports directly into a FileAssist user account (specific folder) without needing or ever being prompted for a username and password.

To set up a Folder Access Key follow these instructions.

1. Click the Share tab.

2. Then click the **Folder Access Keys button.**

3. Then click Create New Folder Access Key, select the folder and **click Generate Key.** This screen will display the folders that have Folder Access Keys, who they are Shared By, whether they are Locked or Unlocked and when they were created. Users can filter searchers and also delete old or unused Access Keys from this screen.

IV. eForms

i. eForms Tab Overview

eForms is a form building module that comes standard with every FileAssist personal online file storage account , as well as work accounts. From surveys and forms, to questionnaires and quizzes, design your forms, send them to anyone, collect and manage responses and analyze the information.
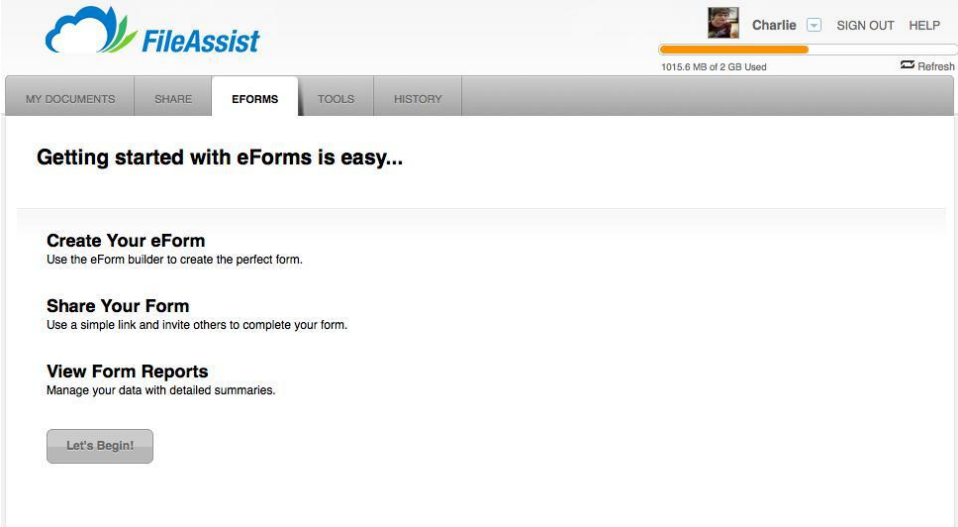
ii. Creating a New Form

start
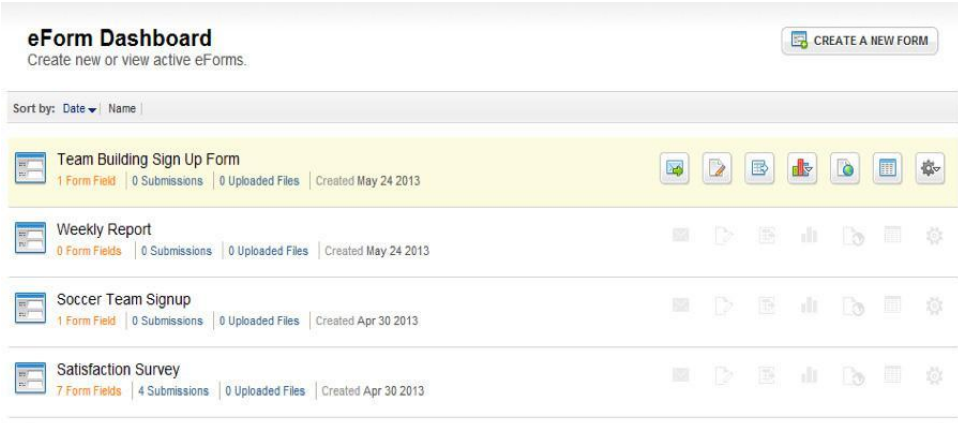
Let's Get Started:

1. Login to your account and **click the eForms tab.**

This will take you to the **eForm Dashboard,** where you can **Create, Share,** or **View** eForms on your account.

2. To edit any preexisting forms **click on the Gear icon** in between the **Pencil** and **Trashcan icons
(left arrow)** or **click the Paper and Pencil icon (right arrow).**

3. Click the Create a New Form button to begin.
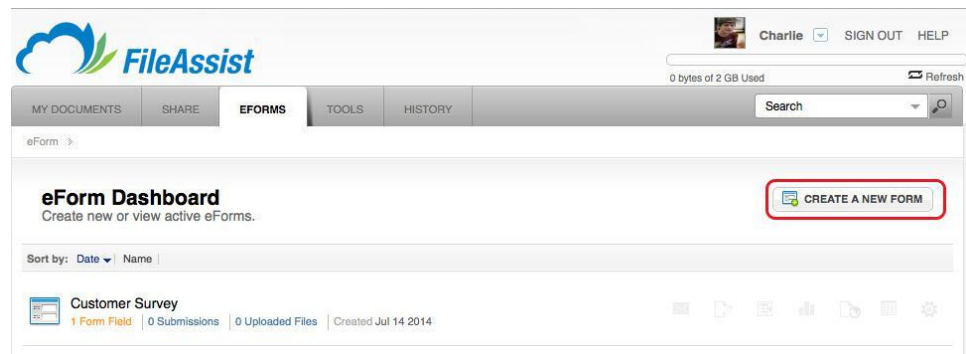
4. Step One Has Two Required Fields: Form Name and Description. Once these forms are filled out,
click next to continue (red box), or **Save & Go to Dashboard (black box)** to save your progress.
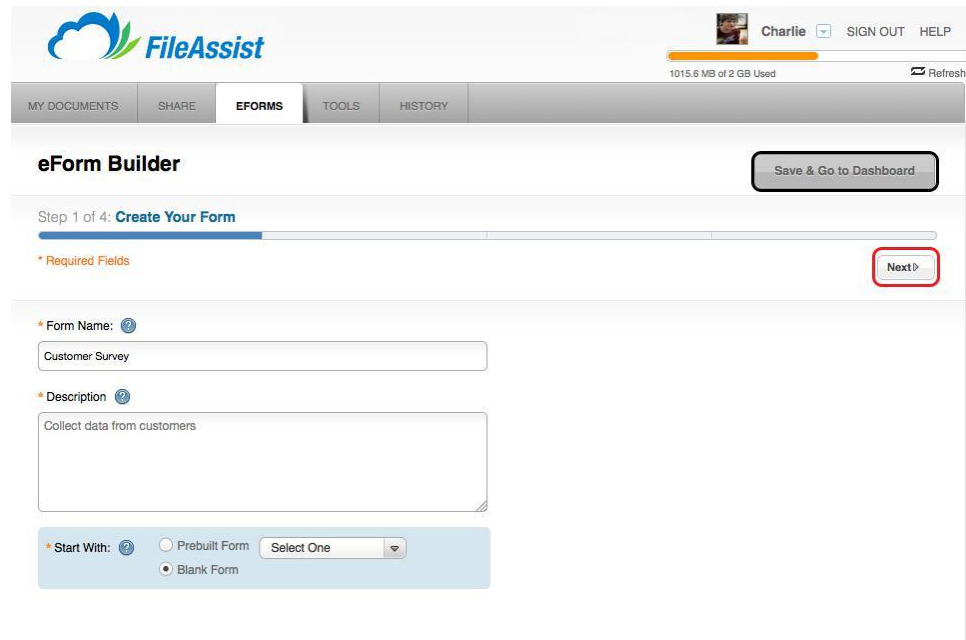
5. If you have already created a form that you want to use as a template for another eForm, **click the Prebuilt Form button** and **select** the desired form from the drop-down menu.
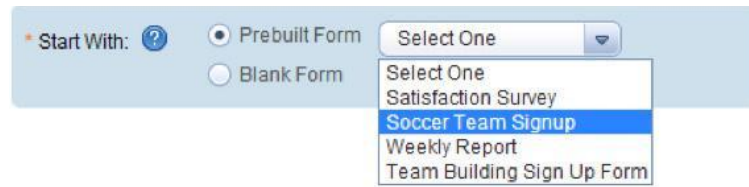
6. Below is Step Two of the eForm Creation: There Won't be Any Fields Because the eForm is Completely Customizable and Guided by Your Needs.
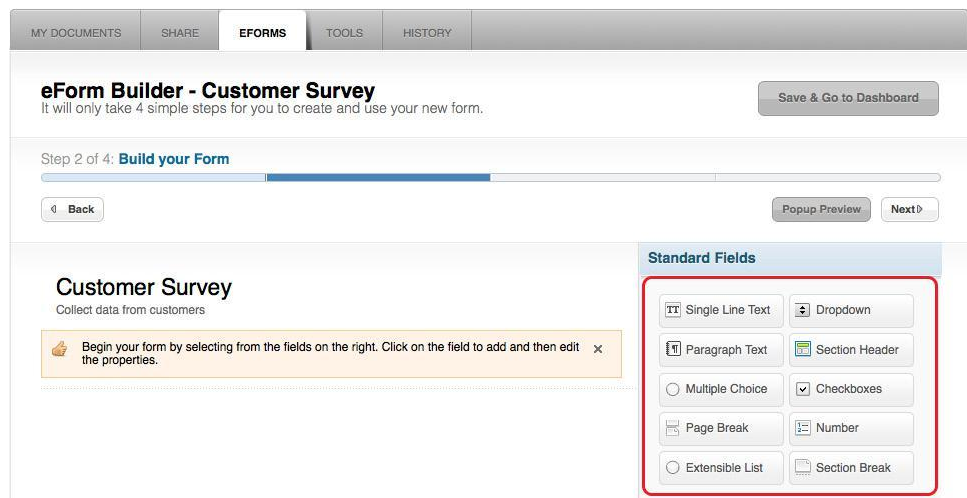
7. On the right hand side of the screen there are two types of fields you can choose from: Standard Fields and **Advanced fields. Click on any of the fields** to input them into your eForm. Remember, each of these different fields, Standard and Advanced, are both fully customizable.

Once you've picked a few of the fields and customized their contents, **click on the Popup Preview (red box) button** to view the eForm as its recipients will see it.
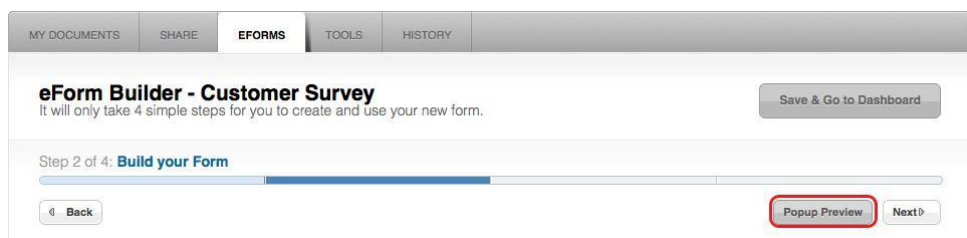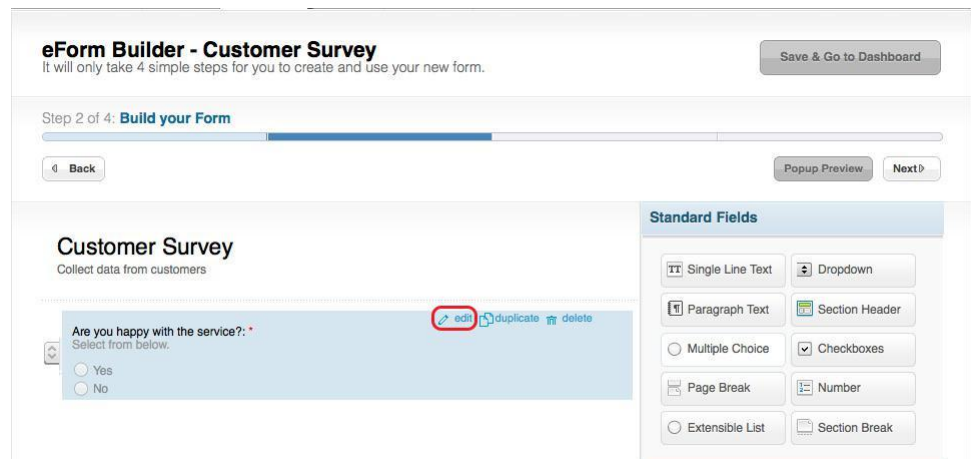
8. Your form will appear in another tab in your browser that you may close after viewing the previewed eForm.
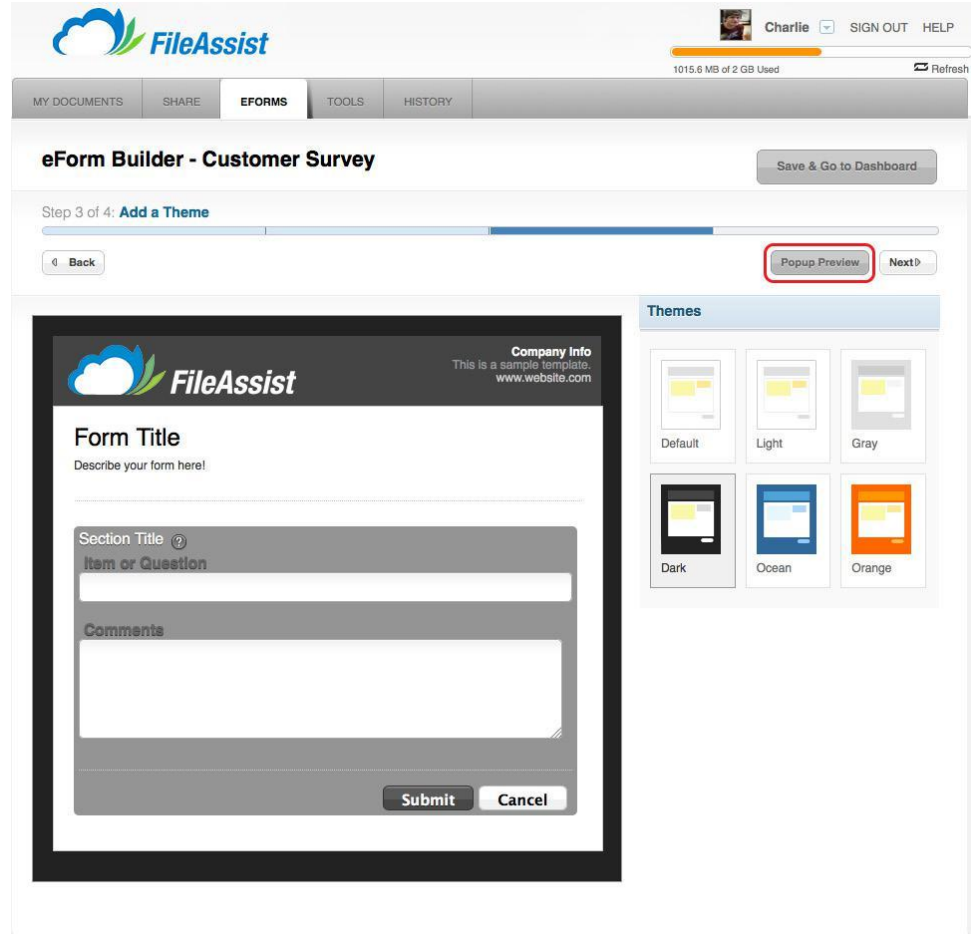
9. If after viewing the preview you are dissatisfied with one of the fields, **move your cursor over the field and select edit.** If you want to change the order of the fields, **left click and hold on the sidebar arrows (red box)** on the left hand side and **drag the form above or below any others.**

10. Once you are satisfied with your eForm, continue on to **step three to Add a Theme.** There are **six different themes** to choose from. Once you've made a selection, **click Popup Preview** to see how it looks. If you aren't satisfied, choose another theme and preview it until you find a theme that suits your eForm.

11. Click view my form to verify the eForm works as you envisioned. Then, using the options on the left hand side, make changes to any of the **eForm Settings (black)** and **Send eForm (blue)** or **click Save & Go to Dashboard (red)** to save the form for later use. To learn more about the eForm settings, click here.

You've finished creating an eForm, but don't fret if you find something you want to change down the road. You can always go back and edit a completed form. To learn more about the settings click here.

iii. eForm Settings

Once you've created an eForm you can customize all of the settings to best suit your needs. For more information about creating an eForm, click here.

To Change Any of the Settings, Click on Any of The Tabs on The Left Side of The Page.
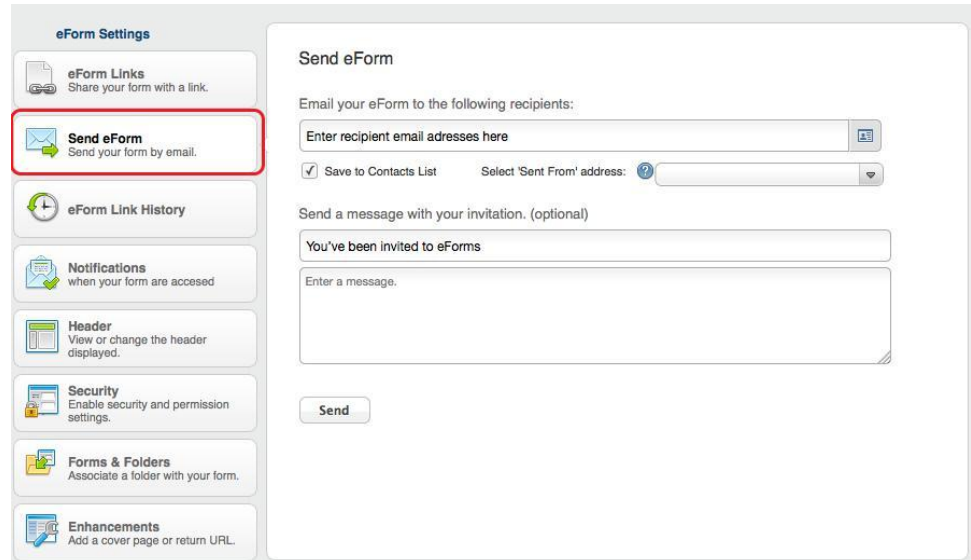
Each of the tabs on the left will change the information displayed on the right. Having selected **Send eForm,** the right portion of the page now displays additional information and customizable settings.
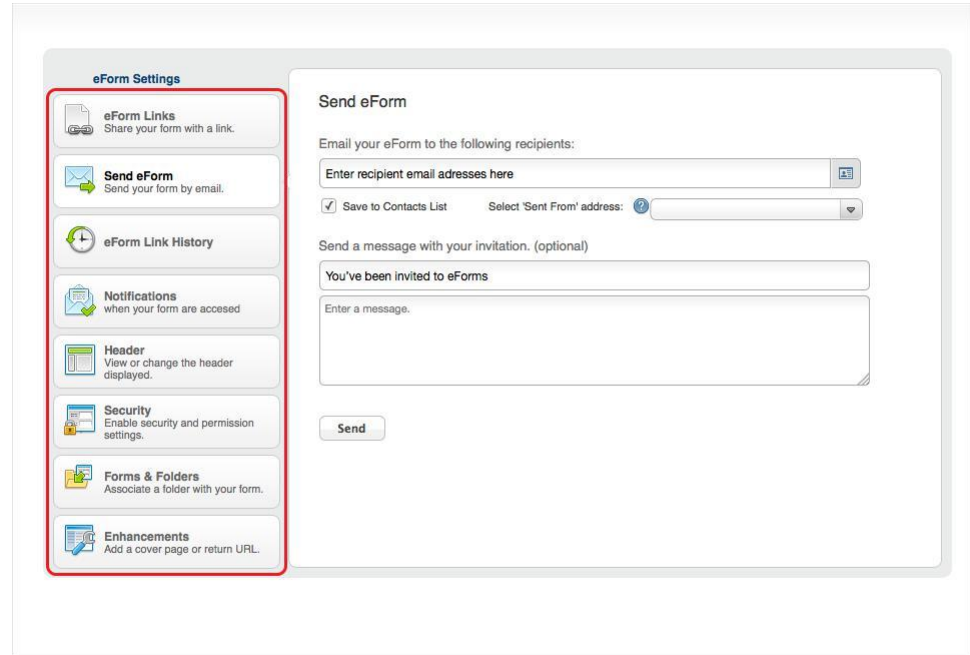
The eForm Links tab presents you with a URL to distribute via email and instant messaging programs and HTML code to embed the link in a webpage.
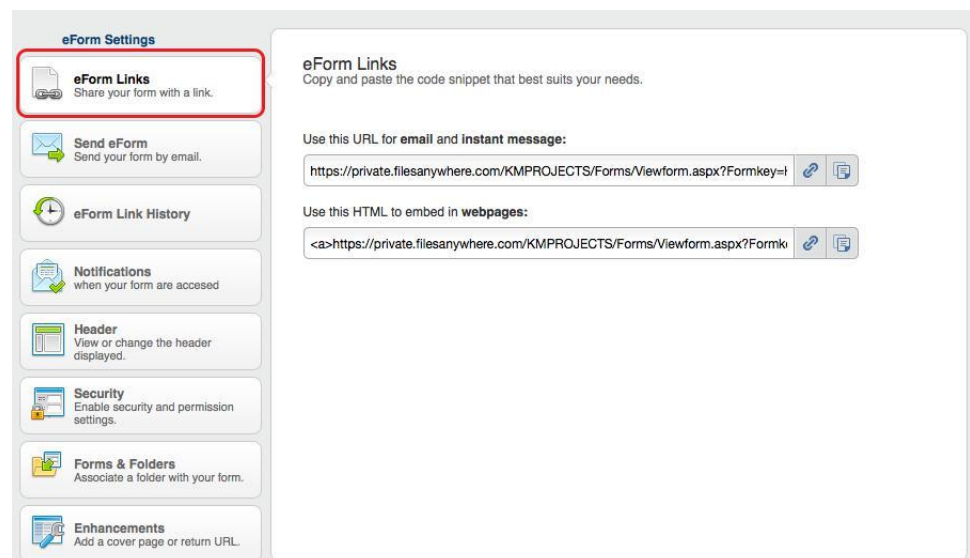
Click the Send eForm tab to select your recipients, add/change the subject line and body of the email.

The eForm Link History displays when the eForm link was sent and to whom.
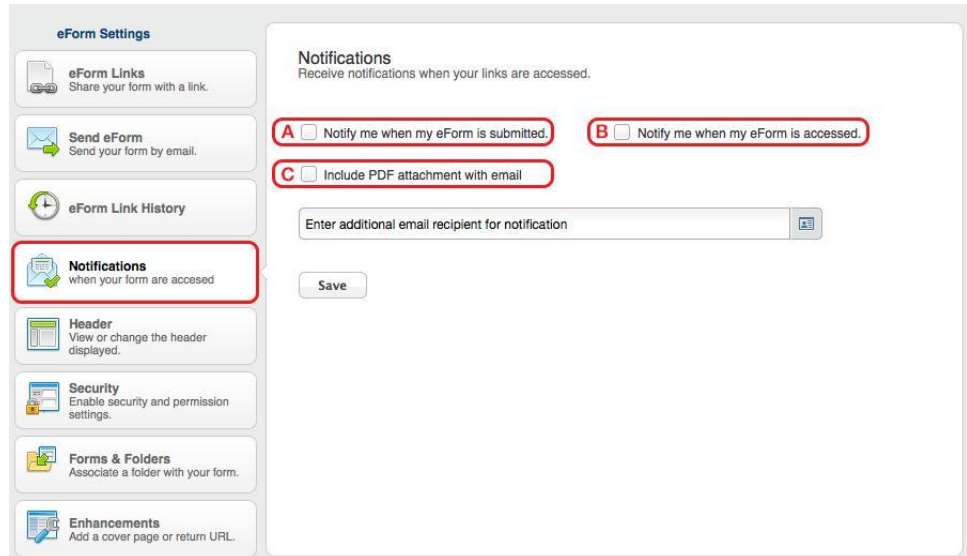
The Notifications tab allows you to **(A)** be notified when the eForm is submitted, **(B)** be notified when the eForm is accessed and **(C)** include a PDF attachment with the notification email.

You are also able to enter an additional recipient to receive the email notifications.

The Header tab allows you to alter the presentation of the eForm. You can **(A)** upload an image as shown below, **(B)** add your name or company's name, **(C)** add a URL link (e. g. to company's website), **(D)** and you may also write a brief description of the eForm.

The Security tab allows you to **(A)** password protect your eForm, **(B)** set an expiration date for the eForm link disabling access after a certain point, **(C)** require user to input text (such as a name) before they can fill out the eForm, **(D)** require user to check the box (e.g. agreeing to terms of service) before continuing to the eForm, **(E)** requires a graphical signature before continuing to the eForm. To alter the **GroupShare™ & Permissions click on the tab to right (F).**

Through the **GroupShare™ & Permissions tab** you are able to grant other users varying levels of access to the eForm. You are also able to notify the users when they are added to the **GroupShare™.**

It is also possible to associate the eForm with a folder **(red box)** and use the form to capture metadata.

To learn more about Metadata click here.
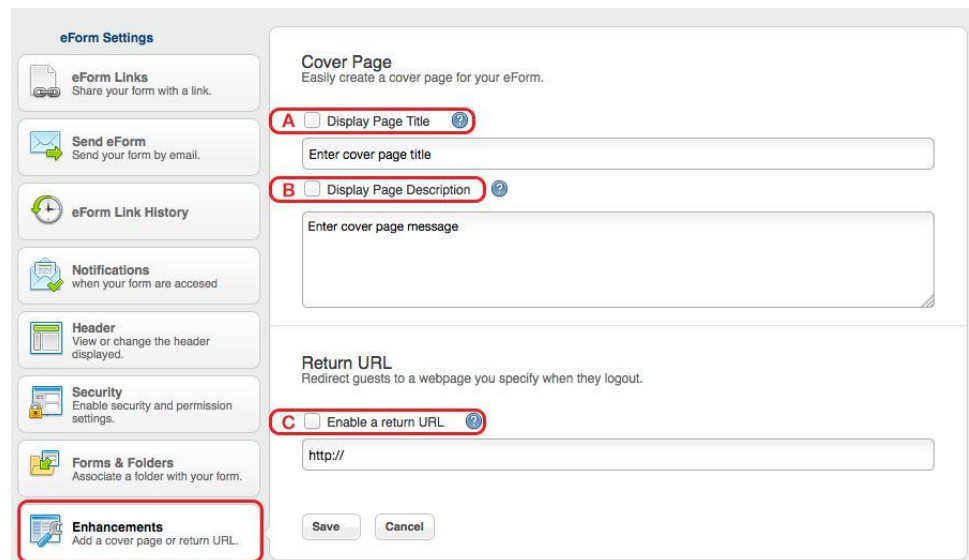
Finally, the **Cover Page** allows you to **(A)** display a page title, **(B)** enter a description and **(C)** enable and include a return URL so that the recipient of the eForm is automatically redirected to a website of your choosing upon completion of the form.

V. Tools

i. Tools Tab Overview

The Tools section of the account provides users with a variety of features. This article will provide an overview of the features and how they can help you use FileAssist.

Let's Get Started:

start

1. Click on the Tools tab at the top of the screen.
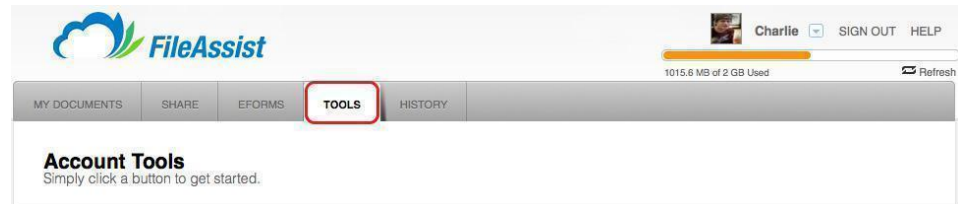
2. Once you are in the **Account Tools section** you will see the **Contacts, Reports, Services, Auto Grouping** and **Technical sections.**

The first section, **Contacts**, contains the **Manage Contacts button** which will take you to an address book which maintains groups and saved contacts.
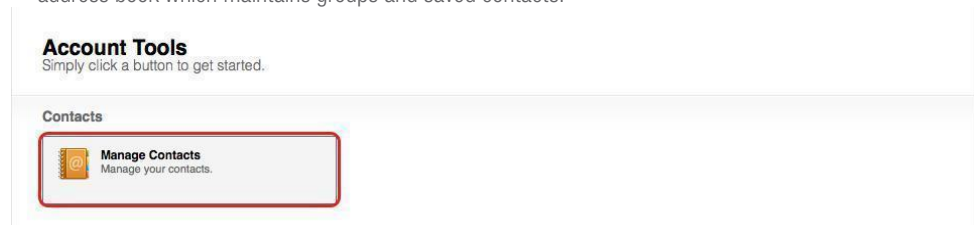
3. The Reports provide you with detailed information regarding the files in the account, what folders are shared and other information about your account's data.

The Services Offer Many Powerful Tools to Manage Your Account and Organize It.

Data Restore – Allows users to backup data from a snapshot taken every day at 11:00PM MST up to thirty days prior.

Convert Docs to PDF – Useful tool for users to convert a .doc file to a .pdf.

Convert Images to PDF – Useful tool for users to convert images to a .pdf.

Upload Backup Estimator – Calculates an estimated upload time for those extra large files.

Manage File Lifecycle – Set file lifecycle rules that will automatically purge files out of a directory.

Index Files – Triggers the system to take a quick inventory of your account.

Virtual Folders – Useful for placing important and frequently accessed files from different locations into one location; similar to a favorite's folder.

Service Plugins – Displays the Service Plugins that FileAssist offers all users.

The Auto Grouping tools are different ways for users to sort their files. Each of these options are a different way to sort the files housed in Virtual Folders. Sorting by **Size, Extension, Date, Tags,** or even **Type** are useful in quickly locating the files you need.

The Technical section offers a Developer API Key signup where you can request an API key to start developing.

ii. Contacts

1. To reach your contact list, **Login** to your account and **click Tools** on the top toolbar.

2. Click Manage Contacts.

3. The Contacts & Teams page is where you will add contacts, teams and export your contact lists.
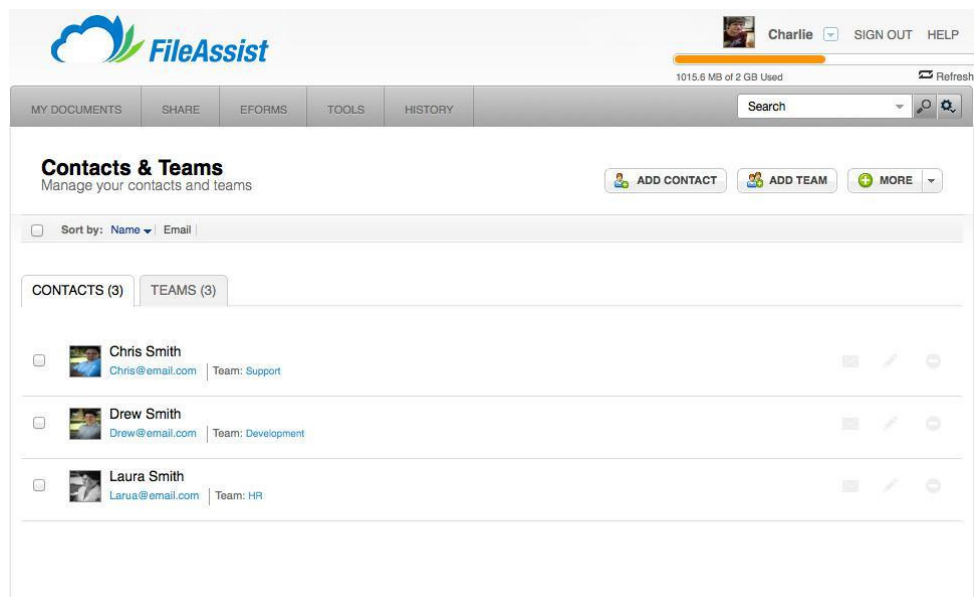
4. Clicking on the Teams tab will display all of the teams you have assigned.
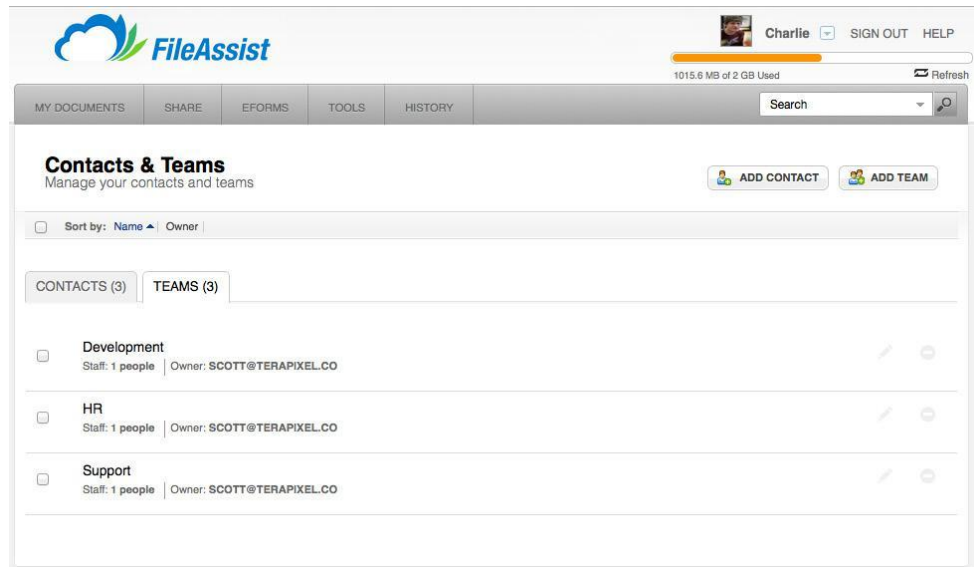
5. Before you can make a team, you need to add your contacts. **Click on the Add Contact button** to begin filling out the information. The Contact Name section only requires an email address, but you can also add their name, other email addresses and even a nickname.

![FileAssist logo]
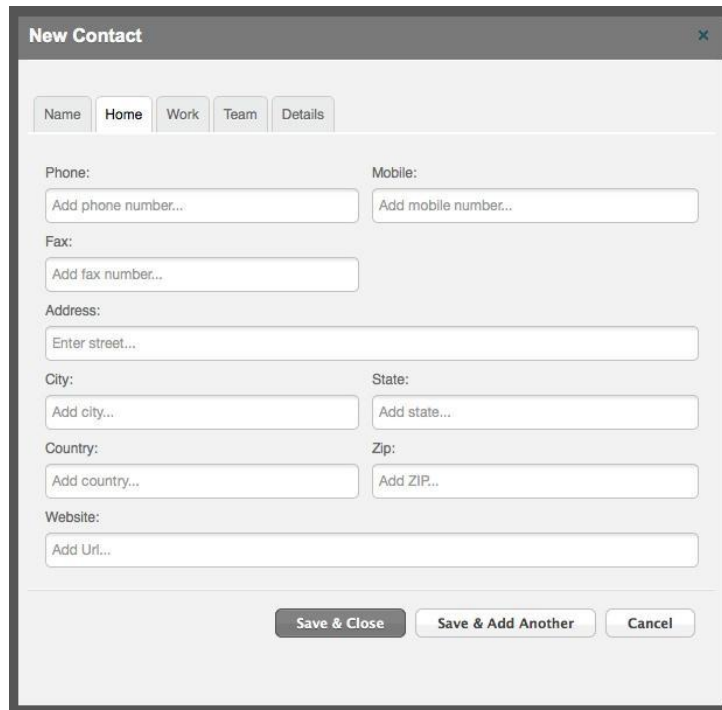
6. Home Details asks for their contact information including their address, phone number and even a personal website, although this section is all optional.
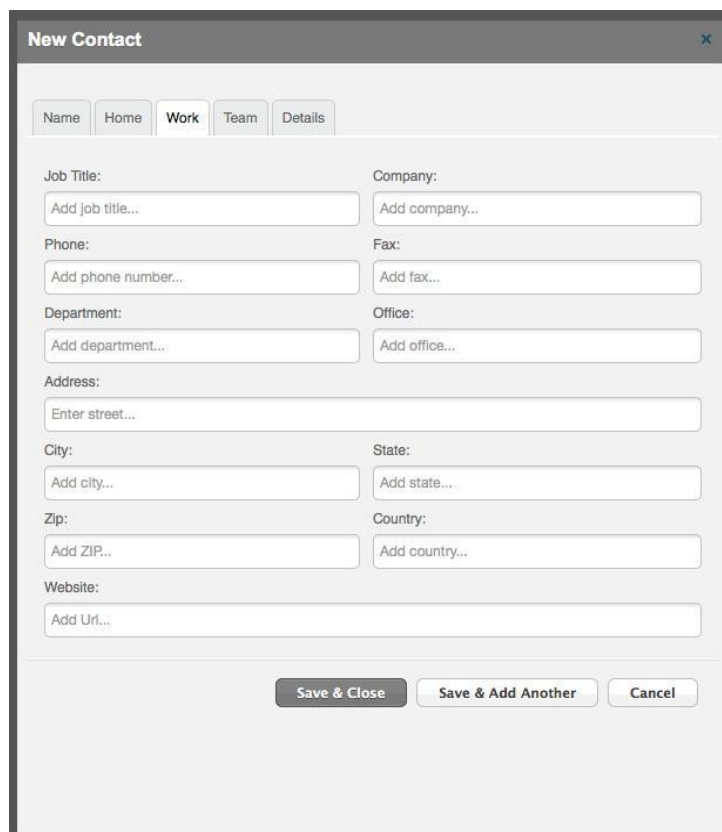
7. Work Details covers basic information about the individual's job, including their Job Title, Company name, phone number, address and some other specifics, though it's all optional and predominantly used for organization and record keeping.
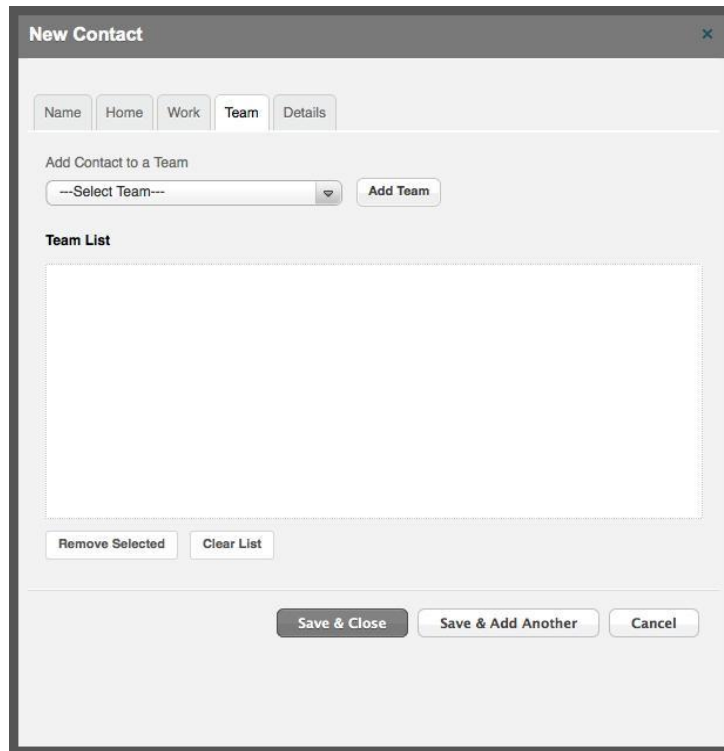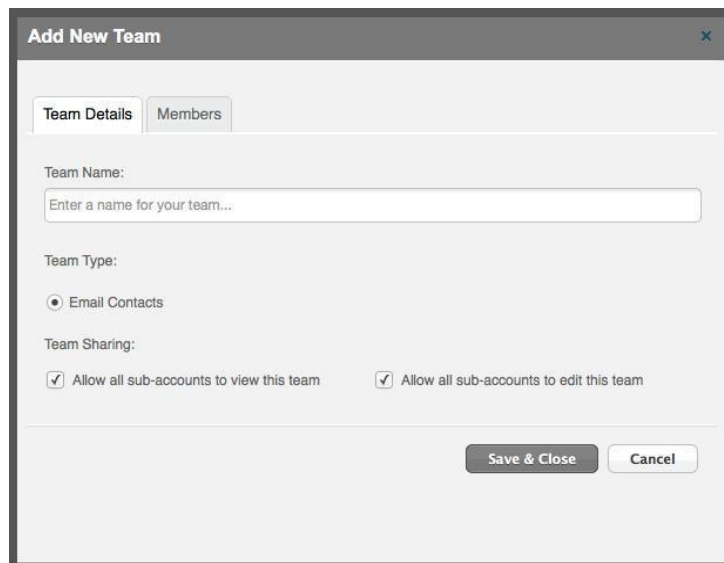
8. From the Team Settings menu you can add your New Contact to a preexisting team (e. g. adding new employee to marketing team).

9. The Team Details tab is a section for you to add notes specific to the person or account.
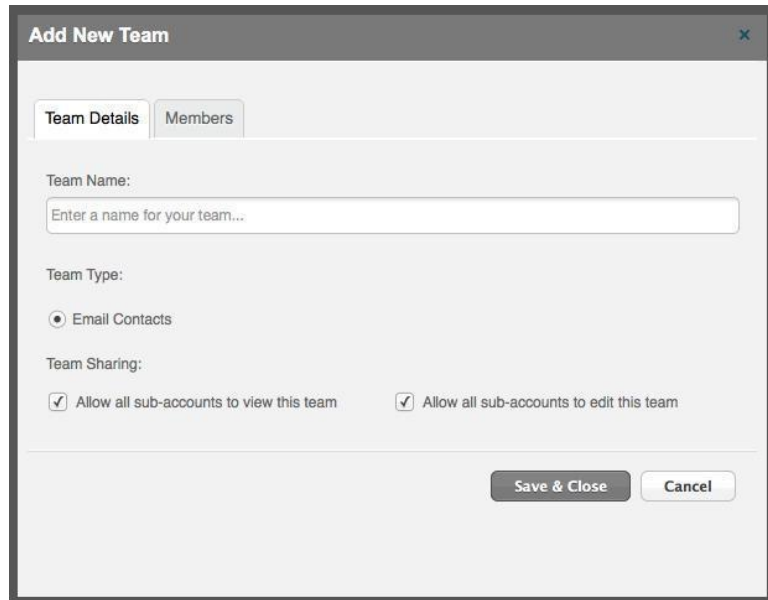
10. Now that you have your contact created, you can **click the Teams tab under the Contacts & Teams section** and **Add Team (black arrow)** to begin the team building process. This section displays created teams, number of members, owner of the team and you can **click on the Pencil icon (red arrow)** to edit the team.
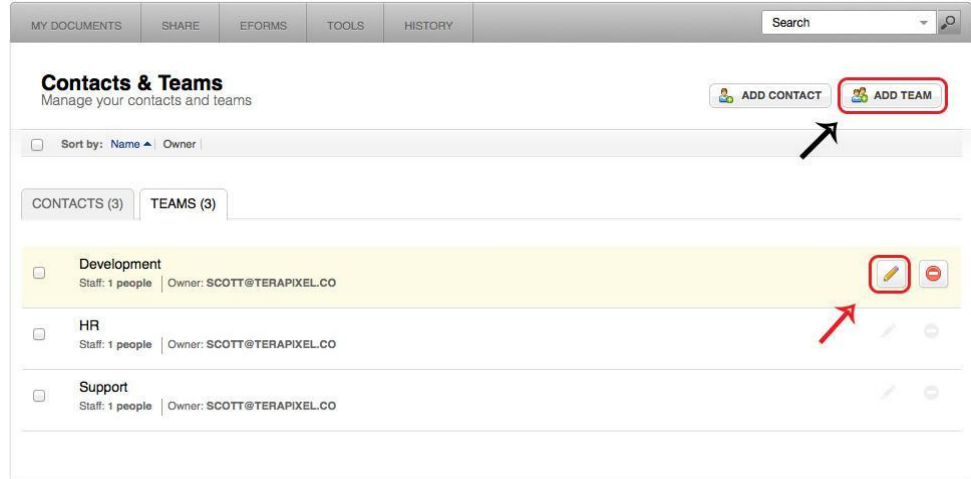
11. Team Details asks for the Team Name, the type (email contacts) and the sharing permissions.

12. The Members tab is where you add people to the team; you have the option of typing in their email addresses or searching through the contacts you've already added.
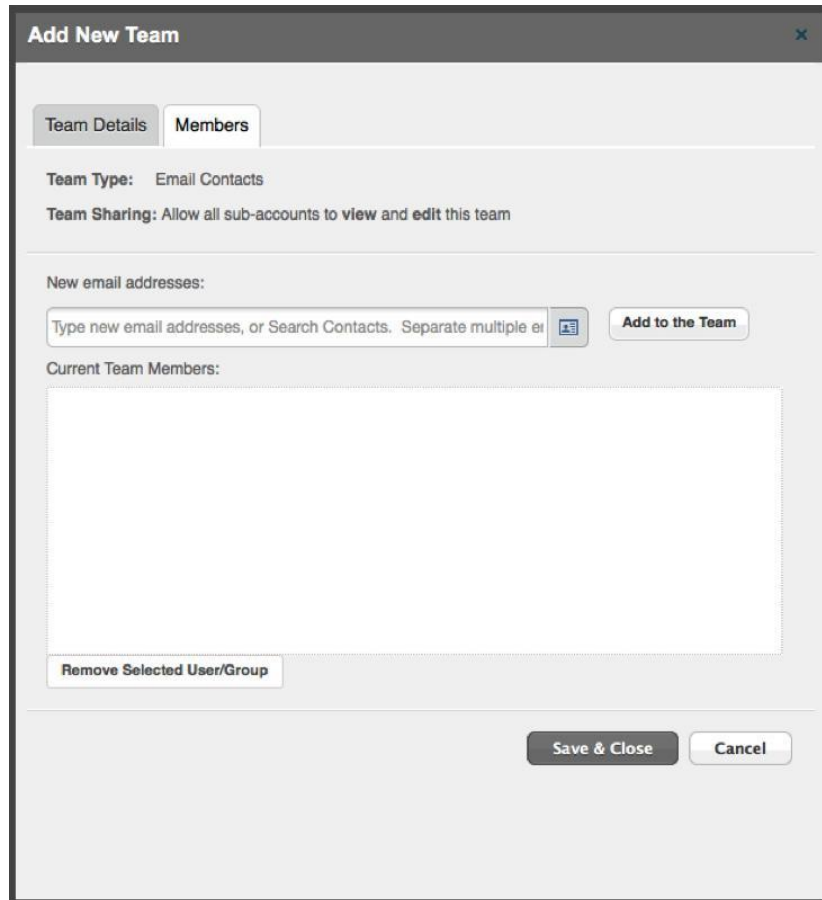
13. Finally, once you've added all the contacts you need, you can export the contacts as an Excel spreadsheet.
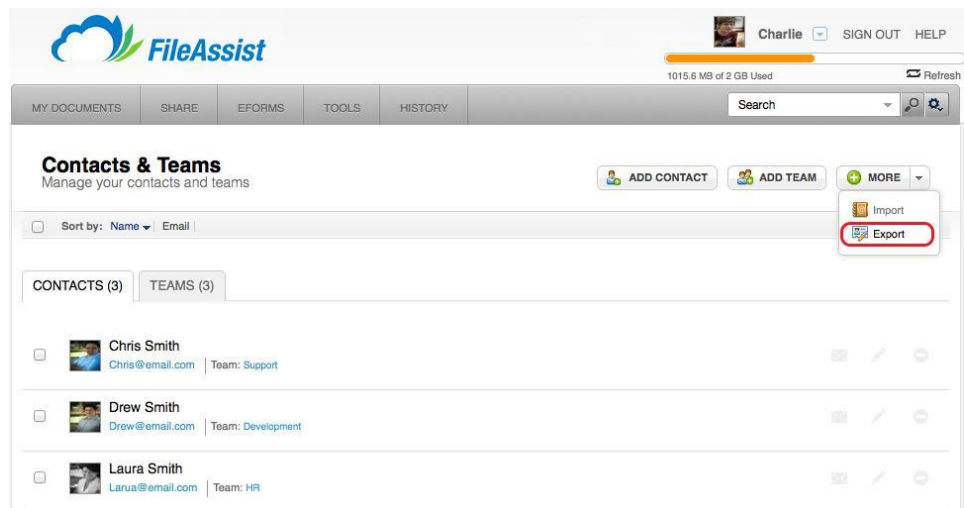
(i) Import Email Contacts

Instead of manually typing in all of the recipients' email addresses you can import your contacts list from your email. You must export your contacts list before you begin this process so that you have the file to import into your FileAssist account.

1. Login to your account and **click Tools.**
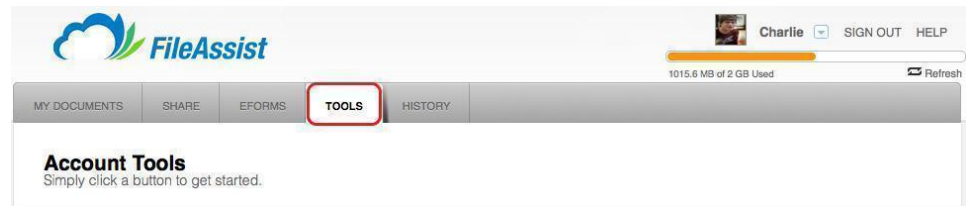
2. Now click Manage Contacts.
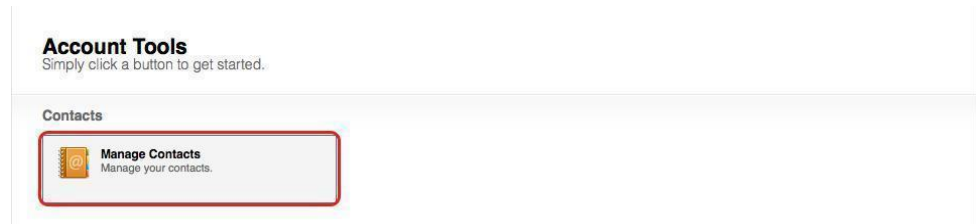
3. Then, on the right hand side, **click the down arrow on the More button** and **click Import.**
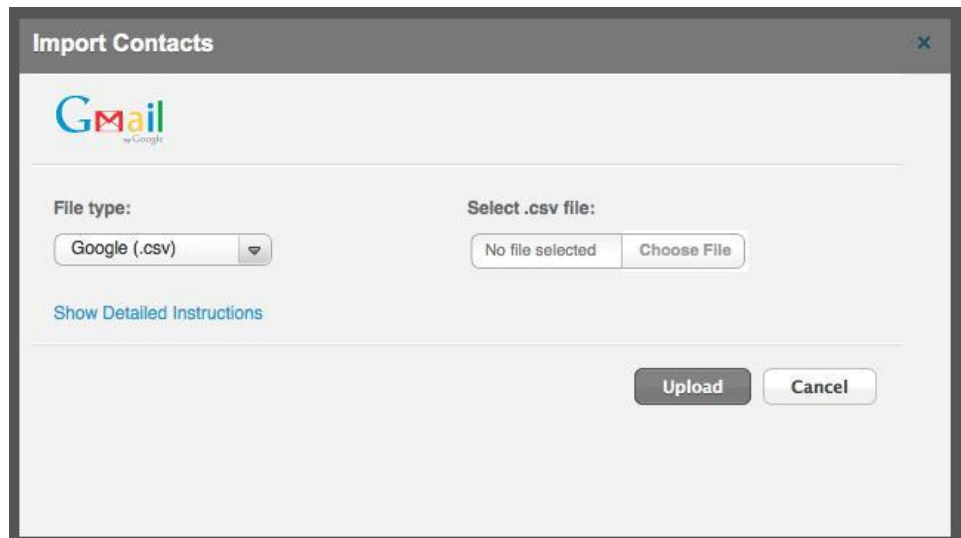
4. A window will pop up asking which email you would like to import from.
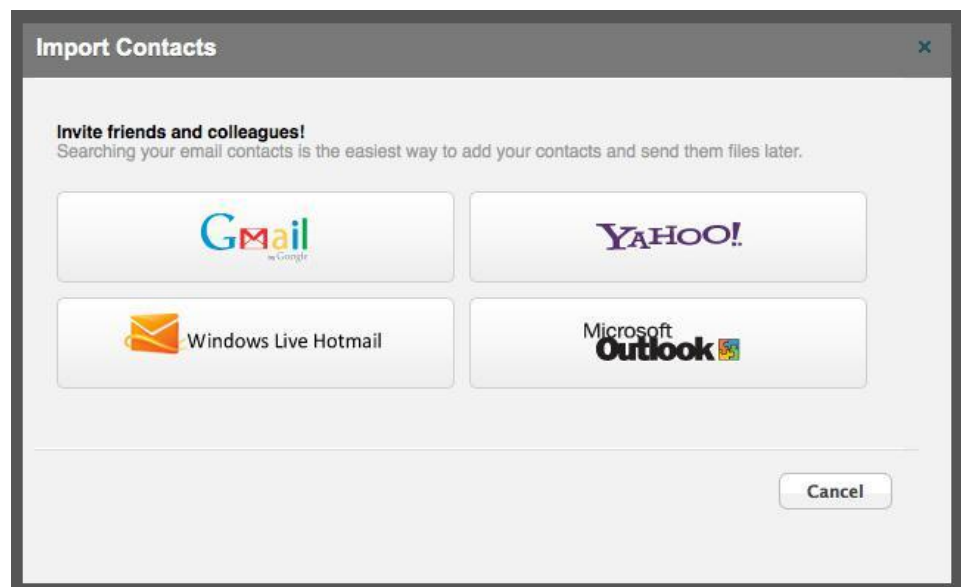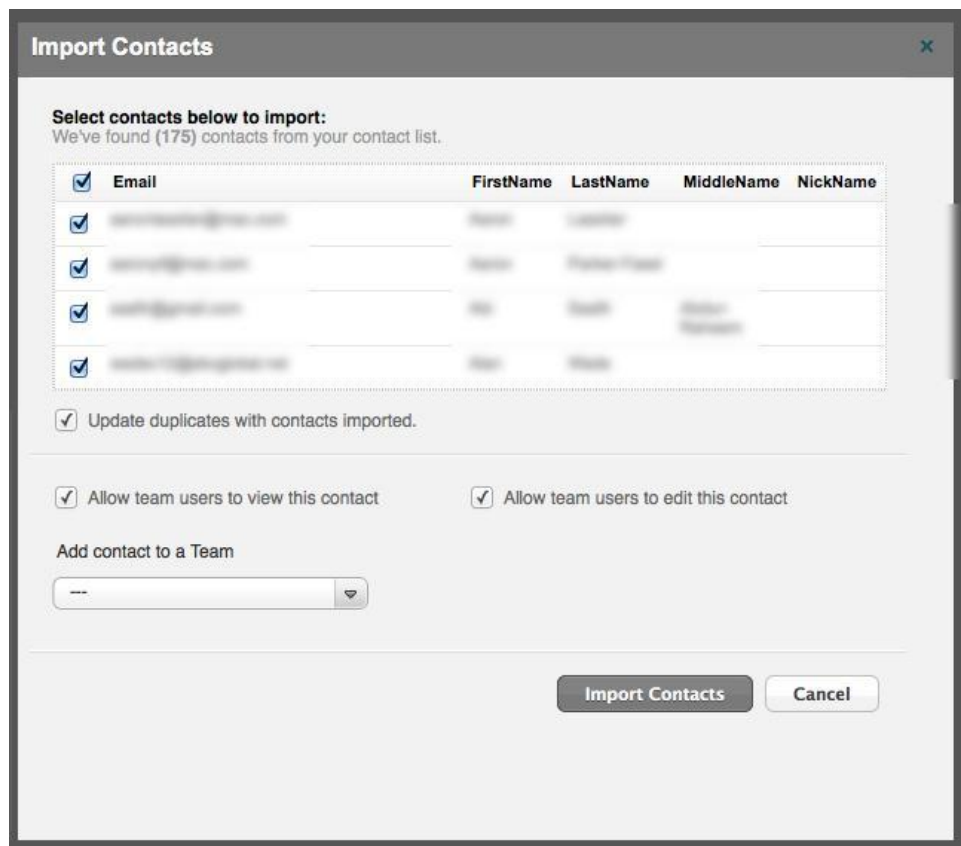
5. Gmail, Yahoo!, Windows Live Hotmail and **Microsoft Outlook** are the only email clients that you can import. Once you've made your selection upload select the file you want to upload.

6. Once you've uploaded the file it will display your contacts to review. You can **add the selected contacts** to a specific team, update duplicates contacts with the newer information, allow team users to view the contact and allow team users to edit the contact.

7. Click Import Contacts and you're done.

iii. Reports

(i) Shared Folders Report

Generating a **GroupShare™ Report** will display all of the information pertinent to the **GroupShare™** like permissions, email addresses, users and more. **To create the report click on Tools** and **then click Shared Folders Report.**
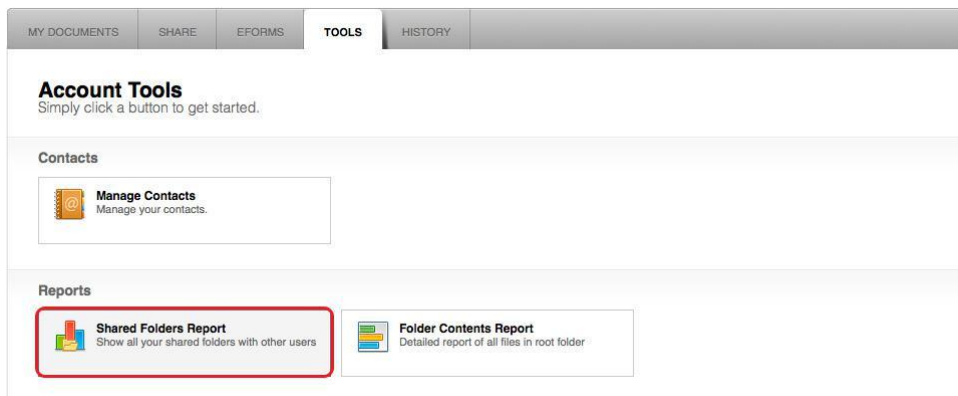
This will process the request and create an Excel spreadsheet for you to download.
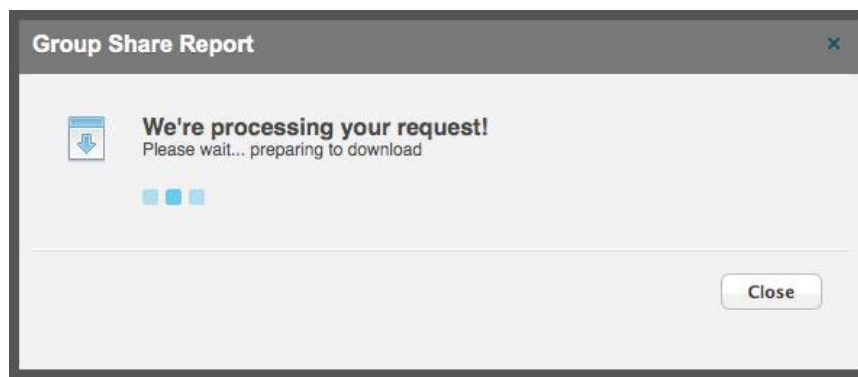
Once the file is downloaded and opened it will display **(A)** The **GroupShare™ Folder, (B)** User it is shared to, **(C)** The user's name, **(D)** the user's email address, **(E)** user status, **(F)** permissions to the folder, and **(G)** the share date.

PRO TIP: If your computer does not have Microsoft Excel you can upload the file to your account and view it using the Zoho Editor.

(ii) Folder Contents Report

Generating a Folder Contents Report will display all of the information regarding the folders in the account.
To create the report click on Tools and then click **Folder Contents Report.**
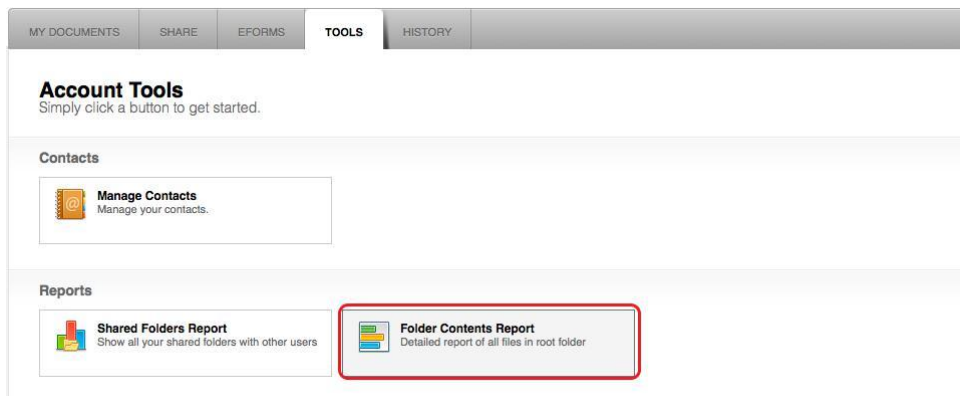
This will process the request and create an Excel spreadsheet for you to download.
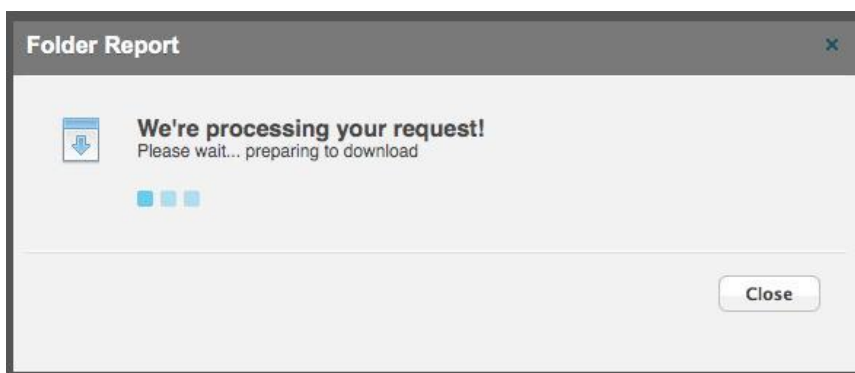
Once the file is downloaded and opened it will display **(A)** The file name, **(B)** file type, **(C)** file size, **(D)** file size in bytes, **(E)** upload date and **(F)** folder pathway.

PRO TIP: If your computer does not have Microsoft Excel you can upload the file to your account and view it online using the Zoho Editor.

iv. Services

(i) Data Restore

Have you ever thrown something away only to find out later that you actually needed that item? Traditionally, you would have to rely on a self-made backup, build a time machine and stop yourself, or simply live without it. Well, not anymore! One of the many cool features with every FileAssist account is the new data restore option. Each account is automatically backed-up every evening, going back a total of 30 days. As long as its on FileAssist, your files, are truly anywhere.
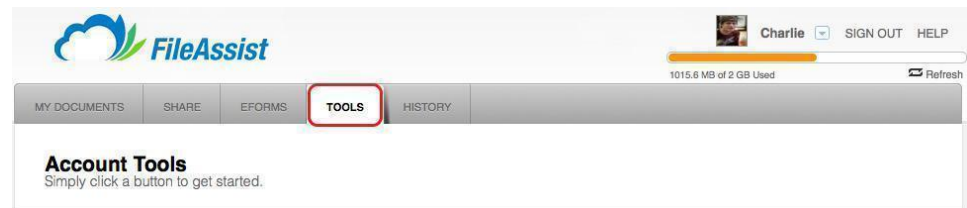
a. Restoring Data

We know the sinking feeling you get the instant you realize an important file or folder has been deleted. That's why FileAssist offers a way for you to retrieve deleted data and place it safely back into your account as many as 30 days later. How's that for peace of mind? Data Restore comes standard with every FileAssist account and above all, is extremely easy to navigate. Below you'll find instructions on how to use Data Restore.
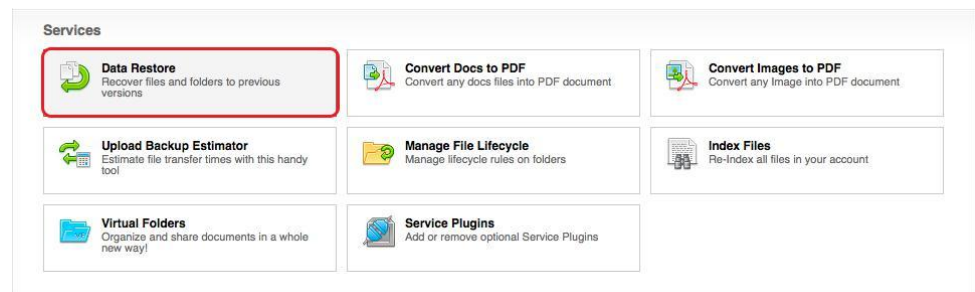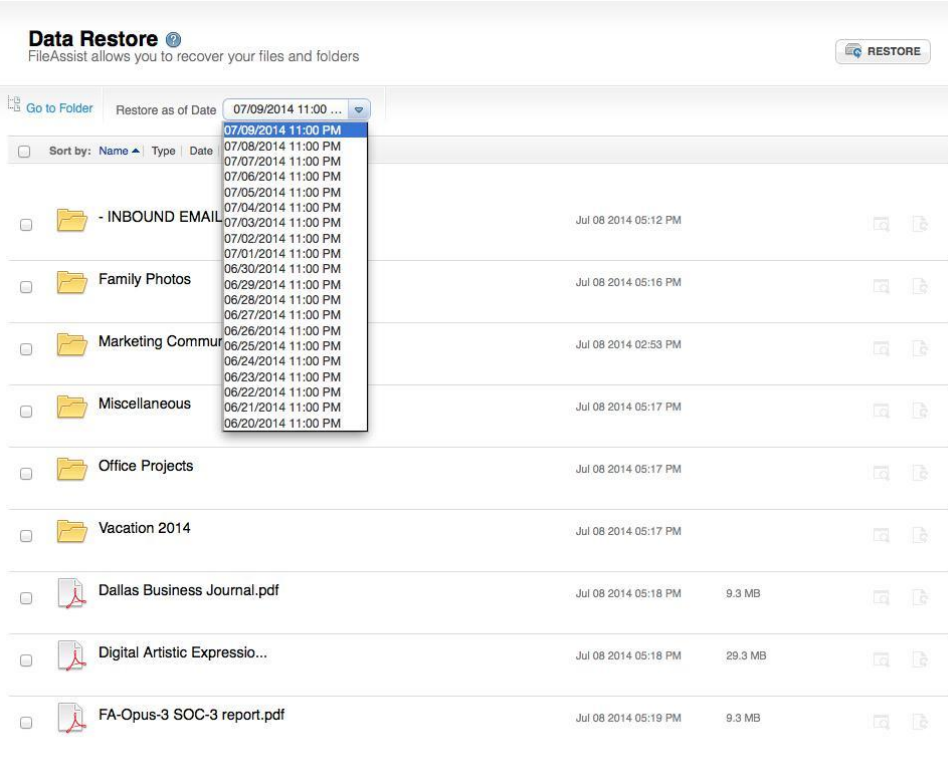
start

Let's Get Started:

1. Login to your FileAssist account.

2. Click the Tools tab.

3. Under the Services section, click on **Data Restore.**

4. Select a date to review files and **folders** backed up the morning of that day. (see below for details on backup scheduling)

5. Select the files or **folders** that you wish to restore and then click the **Restore button.**

NOTE: You may choose a single file or folder, or multiple files and folders, to restore at any given time. Folders containing multiple versions of a file will display each version and allow you to choose the version you wish to restore. Depending upon the amount of information you have chosen to retrieve, this action may take a few moments to complete.

6. Click the My Documents button to return to your folder tree.

### IMPORTANT INFORMATION ABOUT DATA RESTORE

- Data is backed up with a snapshot every morning at 11:00PM MST.

- If you create files or folders after 11:00PM MST, then delete it before 11:00PM MST the next day, there is no method to recover those files or folders.

- Backed up data is stored for 30 days. After 30 days, the data will be permanently deleted and not recoverable.

(ii) Convert Docs and Images to PDF

FileAssist allows users to convert any image or document to PDF. This is very helpful for documents that are required to be in PDF format or for faxing. It is usually best to convert an image to PDF before faxing, depending on the original size of the image.

First, **go to Tools.** There you will have the option to **select Convert Docs to PDF** or **Convert Images to PDF,** as seen below.
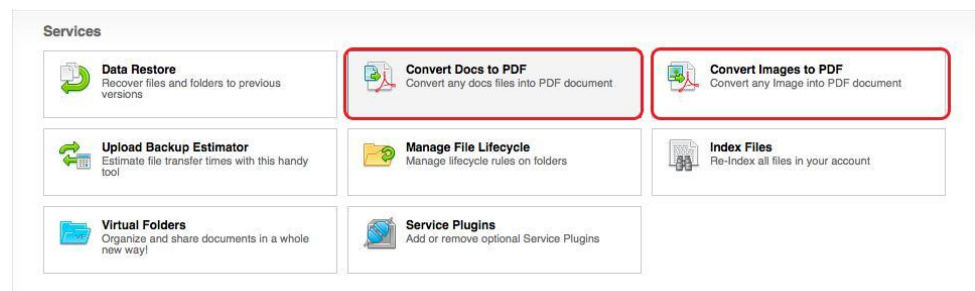

Once you have selected which method you wish to use, you can **follow the steps below to create the PDF.**

1. Browse your FileAssist account to find the document you wish to convert to PDF. Make sure you have already uploaded it to your account.

2. You have the option to select where the converted document goes. Default is the root folder.

3. Click Create PDF and you're done.
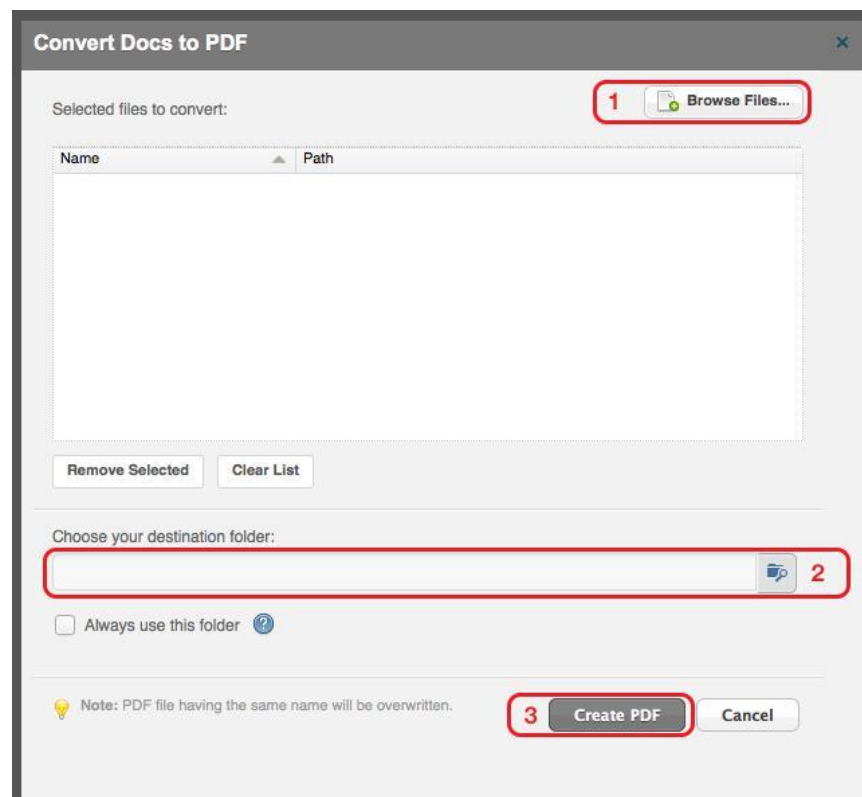
NOTE: When converting images to PDF, you have the option to select what display size you'd like it to be.
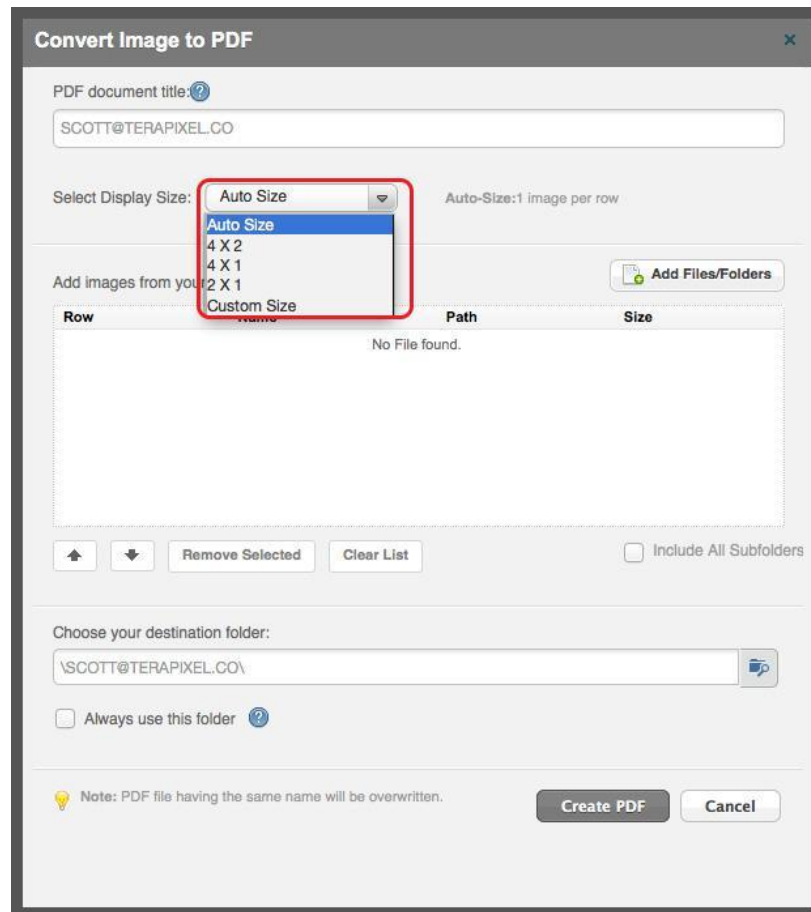
(iii) Upload Backup Estimator

How fast is your Internet connection? It's important to know generally what speeds your connection is achieving for the purposes of uploads and downloads. You can estimate your connection to see your true speed in megabits per second and measure actual performance for free. Just use one of these sites and make sure to select Dallas, Texas as the test location.

• http://www.speakeasy.net/speedtest

• http://www.speedtest.net

Interpreting the Results

Look at the measurement: **Upload Speed.** This is how much data in **MEGABYTES** that can be uploaded using your connection each second.

• Typical upload speed for high-speed DSL or Cable Modem: 300–3000 kbps, or 38-375 KILOBYTES per sec. (1 MB file in 3 to 30 sec)

• Typical upload speed for a full office T1: 1200 kbps, or 150 KILOBYTES per sec. (1 MB file in 6 to 10 sec)

• Typical upload speed for high speed Fiber (FiOS): 2 Mbps–30 Mbps, or 244-3662 KILOBYTES per sec. (1 MB file in 1/4 to 4 sec)

• Dial-up modem and satellite speeds depend on the connection type. You can expect a 1 MB upload to take a few minutes.

Let FileAssist Do the Math

You can also access free speed tests and then use the results to calculate upload/download times from the **Tools tab** at the top of the screen.

Just click on the Upload Backup Estimator button and use the tools provided, including a calculator, standard rates transfer tables and data size and transfer speed equivalents.
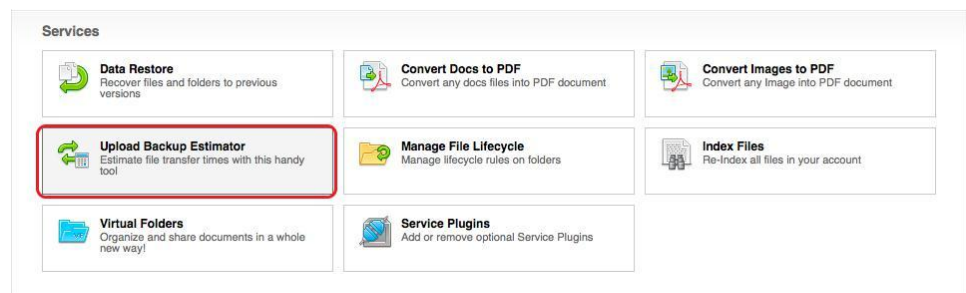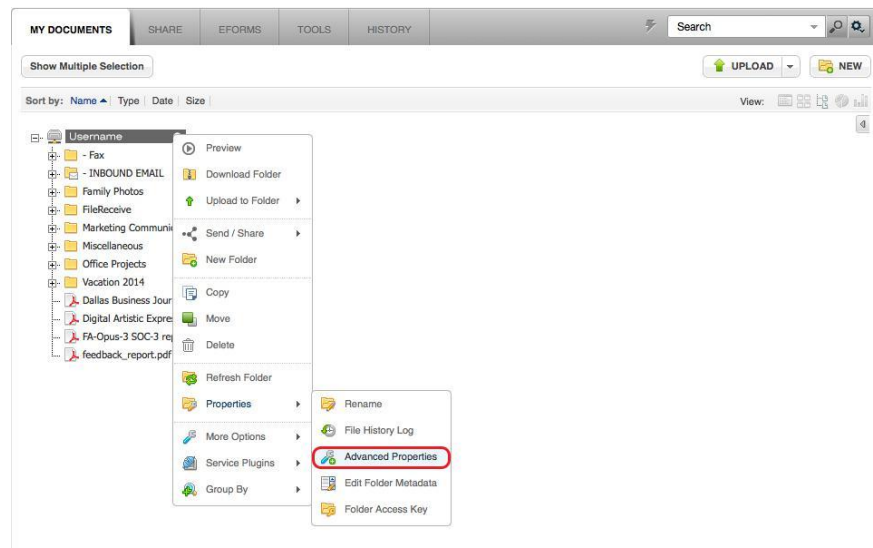

(iv) Manage File Lifecycle

Need a way to do a little spring cleaning inside your FileAssist account? No problem! With this feature, you can automate the task of deleting older files and folders. With **File Lifecycle** feature, you can set rules regarding the expiration and automatic deletion of files and subfolders by designating a retention time period.
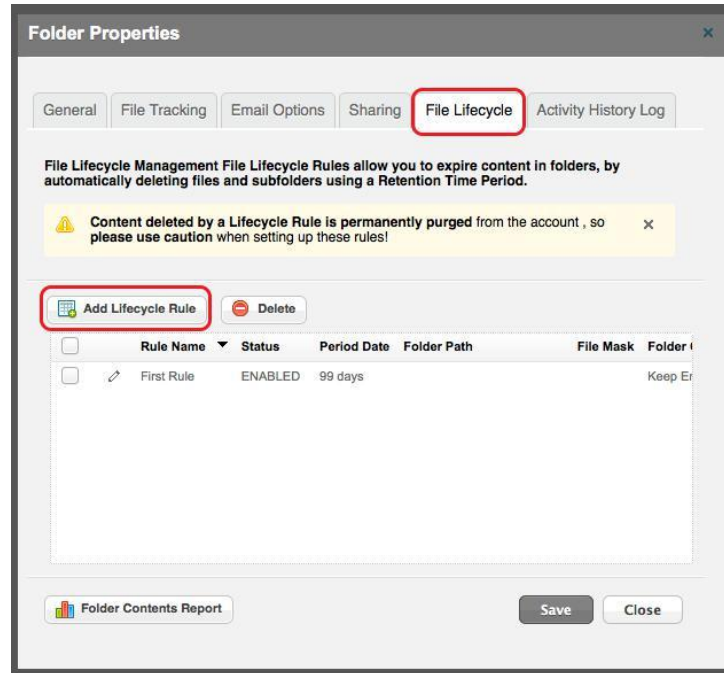
start

Let's Get Started:

After logging into your FileAssist account you may access **File Lifecycle** in one of two ways:

1. Right click the folder for which you wish to define a **File Lifecycle, highlight Properties** and **then click Advanced Properties.**
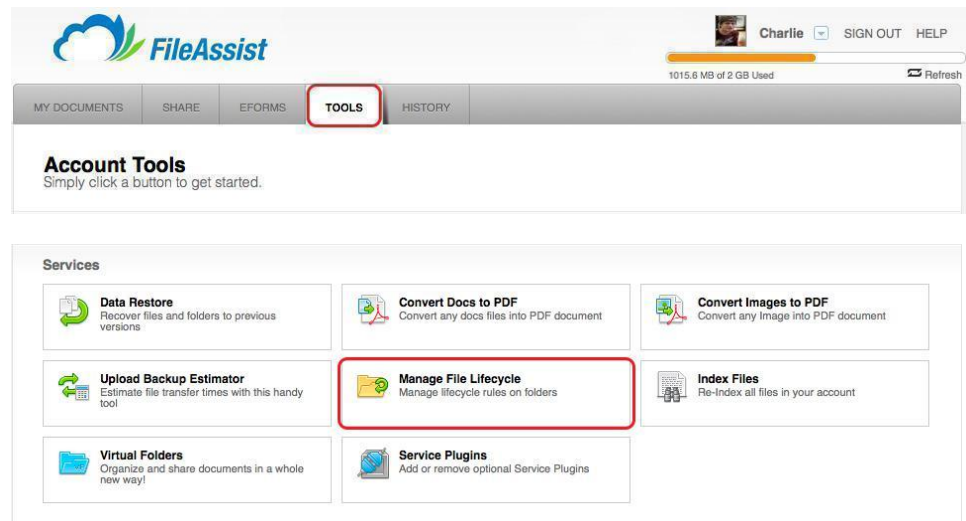
When the Folder properties screen appears, **click the File Lifecycle tab.**

OR

2. You may click the **Tools tab** located at the top, when the **Account Tools screen** appears, **select the Manage File Lifecycle button.**

3. The **File Lifecycle Management screen** will appear. From here you can set rules to allow content to be deleted depending on the criteria you select. If this is the first time to assign a File Lifecycle, you must begin by adding a rule. Options are discussed on the following page.

Adding a Rule

To add a rule, click the Add button adjust the settings below and **then click save.**

CAUTION: Files and folders governed by File Lifecycle rules will be permanently deleted.

- **Lifecycle Rule Name** – You can name the rule something easy to remember.

- **Folder Location** – This is the folder path that will be affected by this rule.

- **Delete Empty Subfolders** – If you want to keep empty subfolders, leave this unchecked.

- **Folder View** – This is how long you want to keep the files/subfolders in question.

- **File Names to Include** – Just like in a search box, put in the criteria you wish to include in the purge. For instance, if you wanted to erase all document files that are left in the folder after a week, then you'd do a search for *.doc (All matching files within the selected folder and in subfolders will be deleted.)

- **Additional Recipients** – If you'd like to send the notification emails to other addresses, this is where you would add them and separate them with a comma (,).

- **Enable This Rule** – Leave this checked if you want the rule enabled. Otherwise, you can disable the rule by un-checking this option.

- **Email Report** – This will send an email notification of the purged files/folders to the email address on file associated with the account.

(v) Index Files

If you are uploading large files (> 2 GB) or a vast amount of smaller files via bulk upload and your account's used space hasn't adjusted after the upload, there are two ways to manually assess your used space.

Refresh

Login to your account and in the top right hand corner click the **Refresh button.** This will force your account to reassess the used storage and reflect the correct used space.
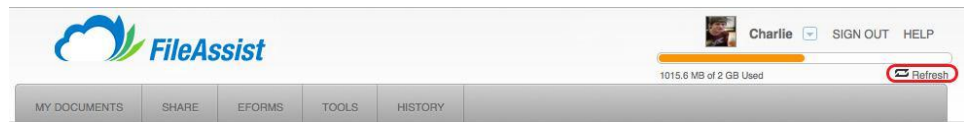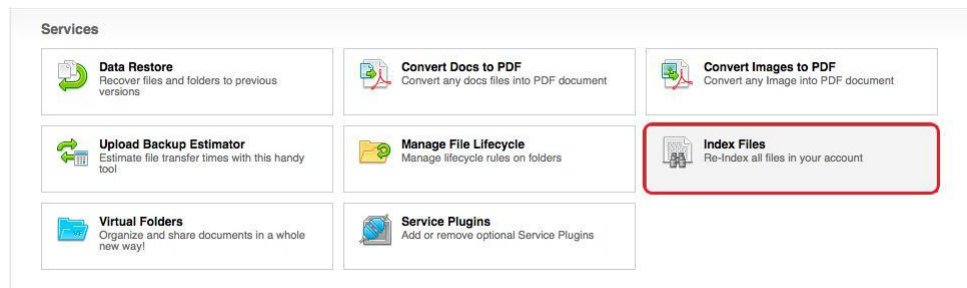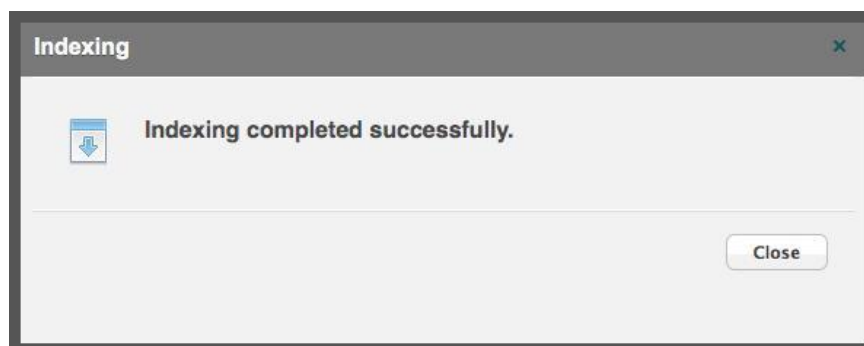

Reindex

Reindexing your account is another way to force the account to take an inventory of all your data. **Click Tools** and **navigate to the services section.**

Once you are here **click the Index Files button** to begin the process.

A small window will pop up showing the progress and when it is finished it will display the image below.

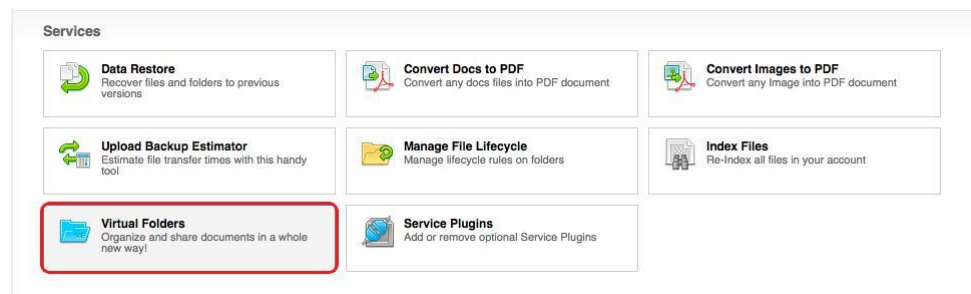**Now your account is indexed and up-to-date!**

(vi) Virtual Folders

Organize your files in unlimited ways without changing your current folder structure or the files themselves. To create a virtual folder follow the provided steps.
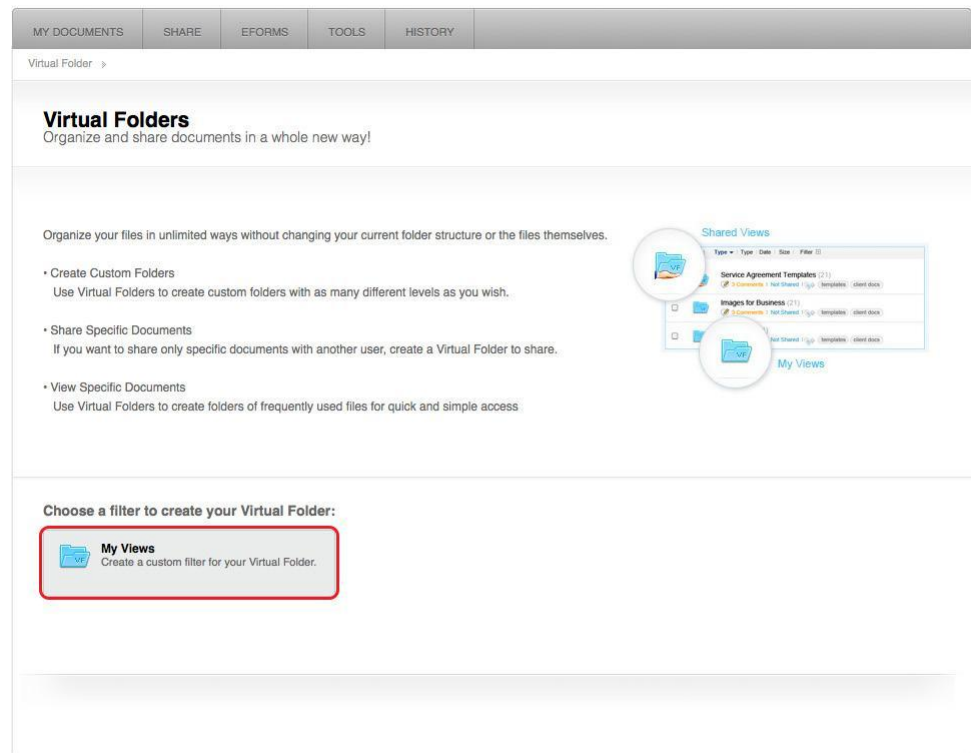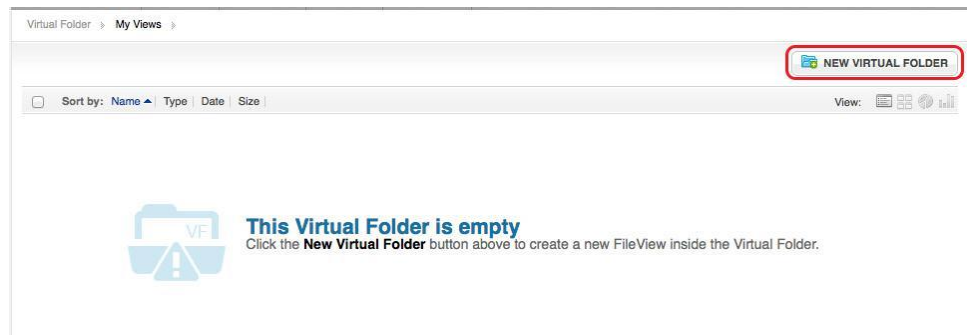
1. Click Tools.

2. Then select Virtual Folders.
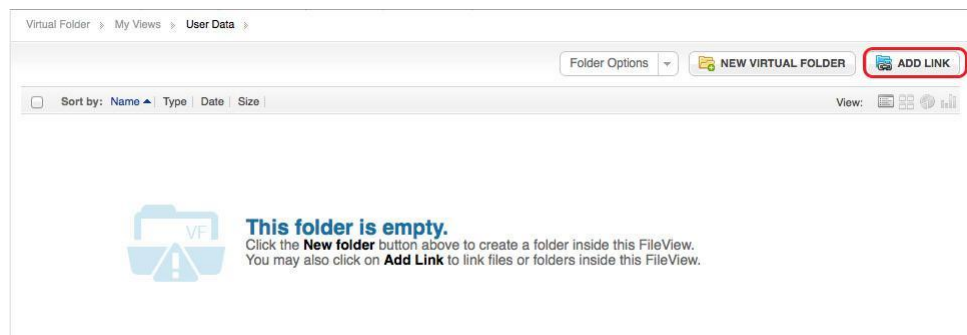

3. Select My Views.

4. Click New Virtual Folder.

5. Name your folder and pick the associating folder.

6. Now click Add Link to add any number of files from all locations in the account to this one location—like shortcuts on a desktop.

You can use **Virtual Folders** to:

Create Custom Folders – Use Virtual Folders to create custom folders with as many different levels as you wish.

Share Specific Documents – If you want to share only specific documents with another user, create a Virtual Folder to share.

View Specific Documents – Easily organize and access frequently accessed files without affecting folder structures.

(vii) Service Plugins

FileAssist includes **Service Plugins** that allow you to edit and view your documents, pictures and other types of data online. These plugins save you the hassle of downloading the files, viewing and editing the file and then uploading it again while worrying about different versions.

a. FileAssist Fax Service (Optional)

Send and receive faxes directly from your FileAssist account. The files must be uploaded to the account before you are able to send them. For more information on sending and receiving faxes please click the links. Make sure you enable sending and receiving.

FileAssist Fax Service

Send and receive faxes through the cloud. Fax any file, receive faxes to your dedicated number, or view faxes online.

Your fax number is: (214) 000-0000   Settings

☑ Send Fax   ☑ Receive Faxes   Disable

b. Zoho Editor

You can make changes to your documents on the fly. This editor allows you to make changes to your Excel spreadsheets, Word documents and PowerPoint presentations online, so you don't have to download the document and then upload the updated version.

Zoho Editor for Spreadsheets, Documents, Slideshows

Edit Excel sheets, Word docs or view PowerPoint presentations, directly from your account, without downloading. Files open in Zoho, a trusted third-party web application. Make and save changes to any XLS or DOC file, entirely online.

☑ Spreadsheet and Document Editor   Disable

c. Aviary Photo Editor

Quickly and easily edit your pictures online with this plugin. You can quickly touch up pictures without needing to download the file, using your own picture editor and uploading the changed image. You can make all of your changes online using our free editor.

Aviary Photo Editor

Edit Photos or Images directly from your account (JPG, JPEG, JPE, JFIF, GIF, PNG, BMP, DIB). Popular effects enhance your pictures, like resize, rotate, contrast, red-eye removal, text notes and more. Changes are saved directly back to your account.

This plugin uses a non-SSL connection, so direct edits are not encrypted.

☑ Photo and Image Editor   Disable

d. Blogger Posting

Post blog entries with pictures, documents, or any other files you want to share through your blog. Though you can quickly make a post and include some of your hosted data, you'll still need to log into your blogging admin console to make any changes to the blog after the entry has been posted.

Blogger.com Posting

Post a new Blogger.com blog entry, with files shared from your FileAssist account.

☑ Photo and Image Editor

Disable

e. AutoCad Viewer

This viewer allows you to view .dwf files so that you can look over Autodesk files inside the browser instead of downloading and opening it within Autodesk itself.

AutoDesk Engineering Drawing Viewer

View AutoCad engineering drawings (dwf files) directly from your account, without any download. Drawings open in Autodesk Freewheel inside your web browser.

This plugin uses a non-SSL connection, so direct edits are not encrypted.

☑ AutoCad Drawing Viewer

Disable

f. WordPress Posting

Post WordPress entries with movies, images, or any compatible file from your account directly from the FileAssist account. To make any changes, you will need to login to your WordPress account.

WordPress.com Posting

Post a new WordPress.com blog entry, with files shared from your FileAssist account.

☑ WordPress Posting

Disable

g. Twitter Backup

Backup your tweets to a specific folder in your FileAssist account. To backup all of your tweets just login to your Twitter account when prompted and it will save every future tweet to your account.

Backup your Tweets!

Login using your Twitter account, click 'Allow', and we will save your tweets to your FileAssist account.

This plugin uses a non-SSL connection.

☑ Twitter Backup

Disable

v. Auto Grouping

Temporarily sort and arrange all of your data based on different set parameters to get a quick, clear and concise view. You can separate everything by Metadata, file types, file age and a few other settings as well. Remember, Auto Grouping is temporary and will not permanently change your account's folder structure. **To begin, click Tools in the top toolbar.**
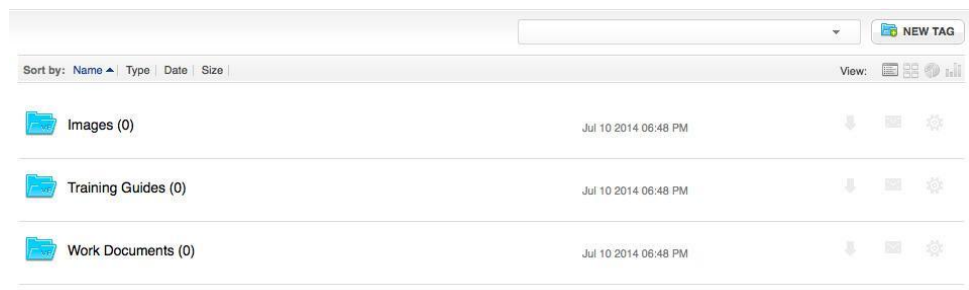

Auto Grouping is located just below the Services on the Tools page. Let's cover them starting at the top left moving right.

(i) Tags
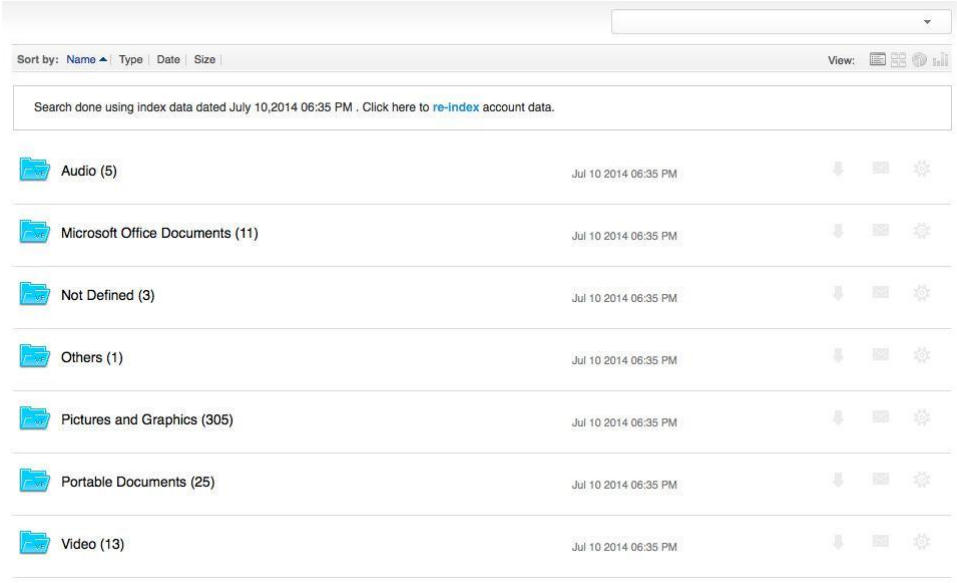
Tags allow you to see all of your data organized based on which files and folders are tagged. The folders represent separate tags and contain the tagged data with everything else that shares that tag.

(ii) File Types

Grouping your data by file types will separate the data into folders that contain data of the same type, like a folder of Microsoft Office documents or video files. If you don't remember where you put that extra precious document or picture, sorting your account's data like this can save a lot of time digging through every file and folder.

(iii) Size

Sorting your data by size will sort and group all files by intervals of 10 MB.
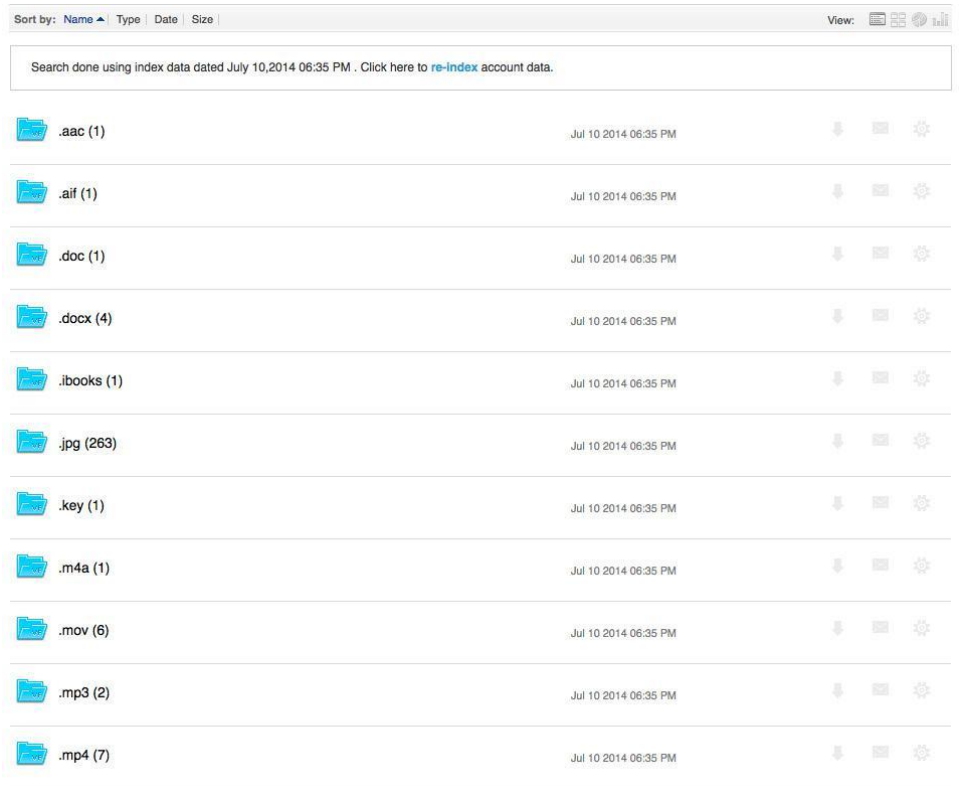
(iv) Extension

Sorting by extension will separate all the files and place them in a folder labeled as the extension. Unlike file type, this is more specific and separates everything based on the extension; for example, a 2003 Word document (.doc) would be in a separate folder from a 2013 Word (.docx) file.
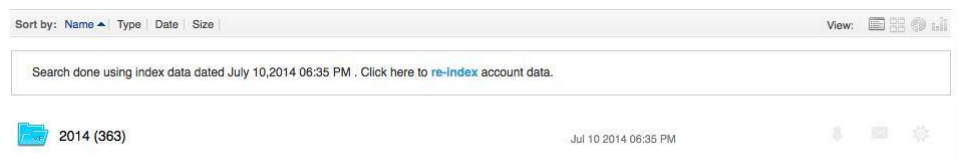
Sort by: Name ▲	Type	Date	Size		View:

Search done using index data dated July 10,2014 06:35 PM . Click here to re-index account data.

.aac (1)	Jul 10 2014 06:35 PM	
.aif (1)	Jul 10 2014 06:35 PM	
.doc (1)	Jul 10 2014 06:35 PM	
.docx (4)	Jul 10 2014 06:35 PM	
.ibooks (1)	Jul 10 2014 06:35 PM	
.jpg (263)	Jul 10 2014 06:35 PM	
.key (1)	Jul 10 2014 06:35 PM	
.m4a (1)	Jul 10 2014 06:35 PM	
.mov (6)	Jul 10 2014 06:35 PM	
.mp3 (2)	Jul 10 2014 06:35 PM	
.mp4 (7)	Jul 10 2014 06:35 PM	

(v) By Date: Year

Sorting by year separates all of the data into folders determined by the year they were uploaded.
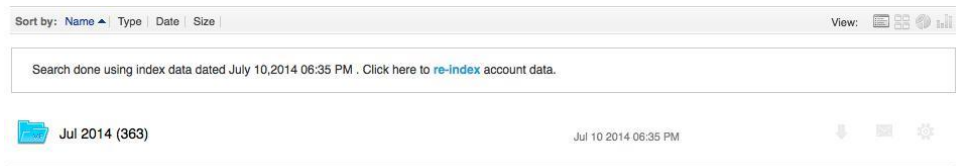
Sort by: Name ▲	Type	Date	Size		View:

Search done using index data dated July 10,2014 06:35 PM . Click here to re-index account data.

2014 (363)	Jul 10 2014 06:35 PM	

(vi) By Date: Month

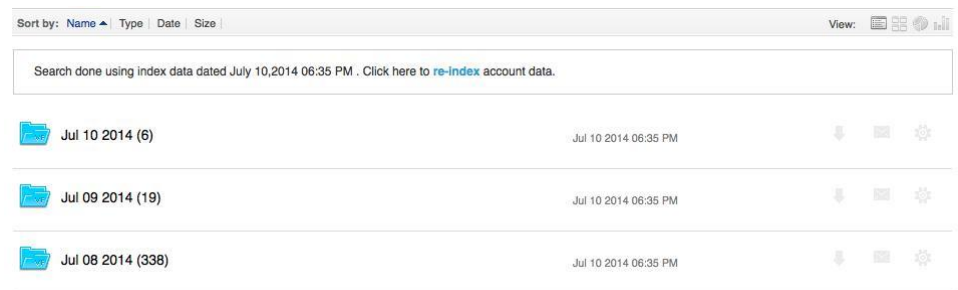Sorting by month separates all of the data into folders determined by the month they were uploaded.

(vii) By Date: Day

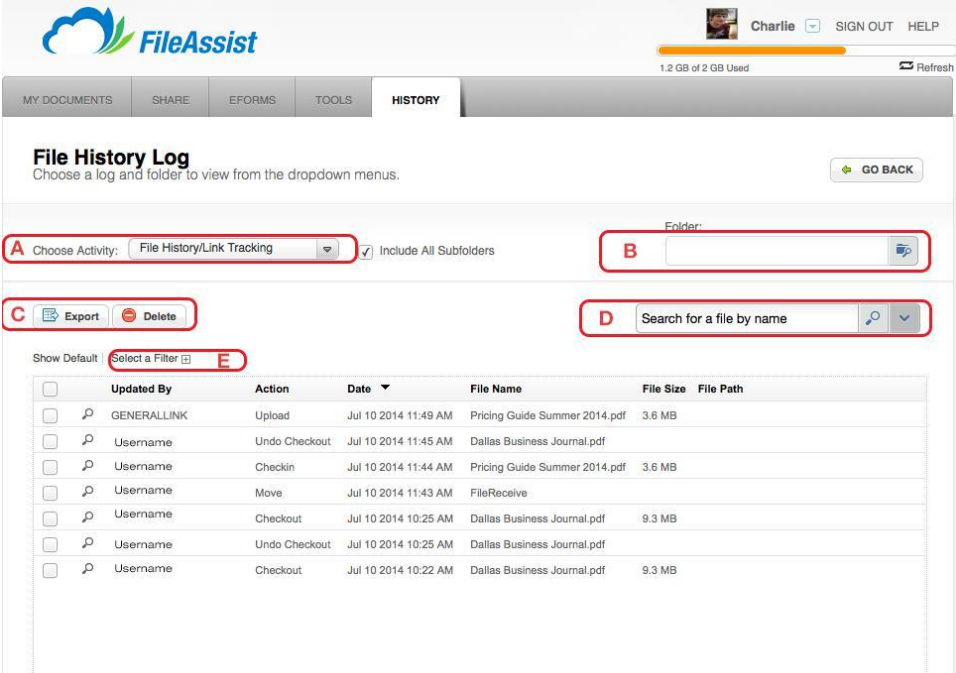Sorting by day separates all of the data into folders determined by the day they were uploaded.

VI. History

i. History Tab Overview

The **Choose Activity drop-down menu** provides three ways to review past account actions in specific folders (as selected on the far right) with the option of including subfolders. These three selections are **File History/Link Tracking, Checkin/Checkout History** and **Currently Checked Out Files.** Further, users may search for a specific file in the folder or even select a filter.

The results in the bottom display the user that performed the action, the action itself, date of the action, the File Name, the File Size, the File Path and finally email on the far right side.

Look over the graphical overview and it's corresponding descriptions below.

A: Sort displayed data by File History/Link Tracking, Checkin/Checkout History and Currently Checked Out Files.

B: Selected folder's contents to be displayed.

C: Export generates a Version history report to be viewed in either HTML or as a downloadable Excel document.

D: Search for a file by name.

E: Click the plus icon in the box to pull up a list of filters as shown in the image below.

ii. File History Log

A snapshot of your file history is just a click away with the **File History Log.** See when files are checked out, checked in, updated, as well as their location, size and the folder path. That's a lot of information, brought together and displayed in one centralized location for your convenience!

Accessing the File History Log

The **File History Log** is accessible in two ways. You may either click the **History tab** at the top of the screen.

OR

Select the folder for which you'd like to view the **history log, right click a**nd **then select Properties** and **then File History Log.**

File History Log Screen

Screen Fields

Path – Displays the selected folder's path.

Browse Button – Clicking the browse button prompts the folder tree allowing you to select a new folder for which to view the history log.

Include All Subfolders – Default setting is enable. You may disable by clicking in the checkbox. Disabling hides the subfolders and allows you to view the history log for just the selected folder.

Export Button – Allows you to view or download the File History Login an Excel spread sheet or text file.

Delete Selected – Deletes the selected file from the version history. **NOTE:** This does not delete the file itself from the folder, just the version that is being logged for historical purposes.

Drop-down Menu – The first drop-down menu allows you to choose what type of history log you would like to view. Choices include **Checkin/Checkout History, File History/Link Tracking a**nd **Currently Checked Out Files.**

Enter file name to filter – Filter your search results by entering file names in the text box.

Select a filter Drop-down – Filter the History Log results by Approved, Checkout, Copy, Delete, Undo Checkout, **GroupShare™** Add, **GroupShare™** Delete, **GroupShare™** Update, Checkin, Move, Read, Rename, Upload, Download.

Show Default Link – Clicking this link refreshes the report to show the default setting of File History/Link Tracking.

Table Fields

Left-Hand Checkbox – When checked, selects the whole row for an action.

View – Prompts the Version Control screen with file details and a comments box for additional notes.

Updated By – Displays the User ID of the person who last updated the file.

Action – Displays the action taken on the file.

Date – Displays a date-time stamp for the latest update on the selected file.

File Name – Displays the file or folder name.

File Size – Displays the size of the file.

File Path – Displays the folder or file path.

Comments – Displays the comments entered with regard to the file.

For complete information on Konica Minolta's FileAssist solution please visit:
www.file-assist.com

FileAssist

KONICA MINOLTA

KONICA MINOLTA BUSINESS SOLUTIONS U.S.A., INC.
100 Williams Drive, Ramsey, New Jersey 07446

CountOnKonicaMinolta.com