


## Deleting Users

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The File Share administrator can delete users. If files are owned by or shared with a user who is being deleted, the administrator must reassign or delete those files before the user can be deleted.

To delete a user, do the following:

1. Select **Manage > Users** on the menu bar.
2. Do one of the following:
  - On a desktop browser, hover the pointer over the user to be deleted.
  - On a mobile device, tap the name of the user you want to delete.
3. Click the delete button .
4. If there are files owned by or shared with the user you are deleting, either select new assignees for the files or delete the files.
  - **Files owned by the user being deleted.** In the drop-down list beneath the Delete or Reassign the Owner of These Files list, select either the name of a user to reassign the files to or **Delete these files** to permanently remove the files from File Share
  - **Files shared with the user being deleted.** In the drop-down list beneath the Delete or Reassign Who These Files are Shared With list, select either the name of a user to share the files with or **Delete these files** to permanently remove the files from File Share.



**Note:** This step is not necessary if there are no files owned or shared with the user you are deleting.

5. Click **Delete** on the confirmation page.

## Using the Shared Files Page

---

The Shared Files page lists all files that you have shared with other File Share users. To open the Shared Files page, select **Files > Shared Files** on the menu bar.

You can perform any of the following tasks on this page:

- [Download files](#)
- [Delete files](#)
- [Email the person you shared a file with](#)

If you are the firm administrator, you also can [reassign files](#).

Click a link below to learn more about using this page.

[Tell me how to find files in the list.](#)





Use the following tools to locate files in the list. Keep in mind that if you select files in the list and then perform any of these actions, your selections will be cleared.



- **Search.** Enter all or part of a file name or user name in the Search text box above the list. As you type, the file list updates to include only files with file names or user names matching your search criteria.
- **Sort.** Click a column header to sort by that column. You can toggle between ascending and descending sorts by clicking the header again. If you leave the page, File Share retains your selected sort column.
- **Paging.** If there are more files in the list than can be displayed on one page, click an arrow or page number beneath the file list to move from one page to another.




**Note:** You can set a default sort column and the default number of files to display per page in your [user profile](#).

[Tell me about the buttons on this page.](#)

Button	Description
 <b>Bulk Download</b>	Displays only when a check box is selected in the file list. Click to download the selected files visible on this page. The downloaded files are packaged in a ZIP file named "FileShare.zip."  <b>Note:</b> Downloaded ZIPs can be no larger than 128 MB.
 <b>Reassign Files</b>	Displays only for the administrator; visible only when a check box is selected for a file in the list. Click to reassign the selected files that are visible on this page to a different user.
 <b>Bulk Delete</b>	Displays only when a check box is selected in the file list. Click to delete the selected files.

Button	Description
 <b>Email</b>	Displays in the file list next to the Shared With column when you hover your pointer over a file in the list. Click this button to create an email addressed to the person the icon is associated with.
 <b>Delete</b>	Displays to the right of the Downloads column in the file list when you hover your pointer over a file in the list. Click this button to delete the file.

[Tell me about the information in the file list.](#)

Item	Description
<input type="checkbox"/> <b>Selection Check Box</b>	Used to select one or more files to perform an action on. Select the check box in the header row to select all files displayed on the page. If you select multiple files at one time, additional buttons that enable bulk actions display above the list.
<b>File Name</b>	Displays the name of the file, including the file name extension. Click a file name to download the file.
<b>Shared On (CST)</b>	Displays the date and time in Central Time that the file was added to File Share.
<b>Size</b>	Displays the size of the file.
<b>Shared With</b>	Displays the name of the person who you shared the file with.
 <b>Downloads</b>	Displays the number of times the person who you shared the file with has downloaded the file.

## Sharing Files

You can use the procedure below to share files in File Share.



**Note:** For security reasons, files with the following file name extensions cannot be shared in File Share:

- EXE
- COM
- DLL
- PS1
- LNK

1. Click **Share Files** on the menu bar.
2. Select the name of the person you want to share the files with.
3. Do one of the following to select the files you want to share:
  - Click **Select File**. Navigate to and select the files to add.
  - Drag files from your computer to the Share Files page.
4. If you are a staff user and selected to share the file with all users, either select or clear the *Send an email to all users* check box to specify if an email should be sent to all users.
5. If needed, edit the email that is sent to the file recipient. You might have to click the arrow next to the Edit Email heading to display the email. You can also select the *CC me on this email* check box to receive a copy of the email.
6. Click **Share**.
  - If your upload is successful, a check mark displays next to the file name.
  - If your upload is not successful, a red triangle with an exclamation point displays next to the file name. If you hover your pointer over the error symbol, a message displays with information about the error that occurred.

## Deleting Files from File Share

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You can delete any files from File Share that you have shared. If you are the firm administrator, you can delete any file in File Share.


When you delete a file, the recipients you have shared it with will no longer have access to the file.

You should verify that the recipients have downloaded or no longer need the file before deleting it.






**Warning:** Files deleted from File Share cannot be recovered. If you think you might need a file in the future, we recommend downloading it before deleting it from File Share.

## Delete a Single File

1. Open the page that lists the file you want to delete.
  - Staff and client users can delete files on the Shared Files or My Files page.
  - The firm administrator can delete files from any File Share file list page.
2. Hover the pointer over the file you want to delete until a [delete icon](#)  displays on the far right side of the row.
3. Click the delete icon.
4. Click **Delete** to confirm the deletion.

## Delete Multiple Files in a Batch

1. Open the page that displays the files you want to delete. 
  - Staff and client users can delete files on the Shared Files or My Files page.
  - The firm administrator can delete files from any File Share file list page.
2. Select the check boxes for the files you want to delete.  
 **Note:** If needed, you can click the check box in the header row to select all the files displayed on the page.
3. Click the [Bulk Delete button](#)  above the list.
4. Click **Delete** to confirm the deletion.

## Using the Public Files Page

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Public files are files that the firm has shared with all File Share users. A list of these files displays on the Public Files page. To open the Public Files page, select **Files > Public Files** on the menu bar.

You can perform the following tasks on this page:

- [Download files](#)
- [Email the file owner or the person the file was shared with](#) 

If you are a staff member who has shared files publicly or the File Share administrator, you can also [delete files](#) from this page. The administrator also is able to [reassign files](#) from here.

Click a link below to learn more about using this page.

[Tell me how to find files in the list.](#)







Use the following tools to locate files in the list. Keep in mind that if you select files in the list and then perform any of these actions, your selections will be cleared.

- **Search.** Enter all or part of a file name or user name in the Search text box above the list. As you type, the file list updates to include only files with file names or user names matching your search criteria.
- **Sort.** Click a column header to sort by that column. You can toggle between ascending and descending sorts by clicking the header again. If you leave the page, File Share retains your selected sort column.
- **Paging.** If there are more files in the list than can be displayed on one page, click an arrow or page number beneath the file list to move from one page to another.





**Note:** You can set a default sort column and the default number of files to display per page in your [user profile](#).

Tell me about the buttons on this page.

Button	Description
 <b>Bulk Download</b>	Displays only when a check box is selected in the file list. Click to download the selected files visible on this page. The downloaded files are packaged in a ZIP file named "FileShare.zip."  <b>Note:</b> Downloaded ZIPs can be no larger than 128 MB.
 <b>Reassign Files</b>	Displays only for the administrator; visible only when a check box is selected for a file in the list. Click to reassign the selected files that are visible on this page to a different user.
 <b>Bulk Delete</b>	<b>Displays only for the administrator;</b> visible only when a check box is selected for a file in the list. Click to delete the selected files.
 <b>Email</b>	Displays in the file list next to the Owner column when you hover your pointer over a file in the list. Click to create an email addressed to the person the icon is associated with.
	Displays to the right of the Downloads column when you hover your pointer over a file. Visible on all files for the firm administrator; staff members who have shared files

Button	Description
<b>Delete</b>	publicly will see it for the files they have shared. Click this button to delete the file.

[Tell me about the information in the file list.](#)

Item	Description
<input type="checkbox"/> <b>Selection Check Box</b>	Used to select one or more files to perform an action on. Select the check box in the header row to select all files displayed on the page. If you select multiple files at one time, additional buttons that enable bulk actions display above the list.
<b>File Name</b>	Displays the name of the file, including the file name extension. Click a file name to download the file.
<b>Shared On (CST)</b>	Displays the date and time in Central Time that the file was added to File Share.
<b>Size</b>	Displays the size of the file.
<b>Owner</b>	Displays the name of the person who shared the file.
  <b>Downloads</b>	Displays the number of times the file has been downloaded by the people listed in the Shared With column.

## Using the My Files Page

The My Files page lists all the files that you have **received or shared** in File Share. To open the My Files page, select **Files > My Files** on the menu bar.

You can perform any of the following tasks on this page:

- [Download files](#)
- [Delete files](#)
- [Email the file owner or recipient](#)

If you are the File Share administrator, you can also [reassign files](#) from this page.

Click a link below to learn more about using this page.

### Tell me how to find files in the list.






Use the following tools to locate files in the list. Keep in mind that if you select files in the list and then perform any of these actions, your selections will be cleared.

- **Search.** Enter all or part of a file name or user name in the Search text box above the list. As you type, the file list updates to include only files with file names or user names matching your search criteria.
- **Sort.** Click a column header to sort by that column. You can toggle between ascending and descending sorts by clicking the header again. If you leave the page, File Share retains your selected sort column.
- **Paging.** If there are more files in the list than can be displayed on one page, click an arrow or page number beneath the file list to move from one page to another.




**Note:** You can set a default sort column and the default number of files to display per page in your [user profile](#).


### Tell me about the buttons on this page.

Button	Description
 <b>Bulk Download</b>	Displays only when a check box is selected in the file list. Click to download the selected files visible on this page. The downloaded files are packaged in a ZIP file named "FileShare.zip."  <b>Note:</b> Downloaded ZIPs can be no larger than 128 MB.
 <b>Reassign Files</b>	Displays only for the administrator; visible only when a check box is selected for a file in the list. Click to reassign the selected files that are visible on this page to a different user. You can reassign ownership of the files, as well as who the files are shared with.
 <b>Bulk Delete</b>	<b>Displays only for the administrator;</b> visible only when a check box is selected for a file in the list. Click to delete the selected files.
 <b>Email</b>	Displays in the file list next to the Shared With and Owner columns when you hover your pointer over a file in the list. Click this button to create an email addressed to the person the icon is associated with.




Button	Description
 <b>Delete</b>	Displays to the right of the Downloads column in the file list when you hover your pointer over a file that you are the owner of. Click this button to delete the file.

[Tell me about the information in the file list.](#)

Item	Description
<input type="checkbox"/> <b>Selection Check Box</b>	Used to select one or more files to perform an action on. Select the check box in the header row to select all files displayed on the page. If you select multiple files at one time, additional buttons that enable bulk actions display above the list.
<b>File Name</b>	Displays the name of the file, including the file name extension. Click a file name to download the file.
<b>Shared On (CST)</b>	Displays the date and time in Central Time that the file was added to File Share.
<b>Size</b>	Displays the size of the file.
<b>Owner</b>	Displays the name of the person who shared the file.
<b>Shared With</b>	Displays the name of the person who the file was shared with. When the file is a public file, this column displays "Everyone."
 <b>Downloads</b>	Displays the number of times <b>the recipients of the file have downloaded it.</b>

## Selecting Staff Members Who Can Receive Files from Clients

The staff members who clients can share files with are specified by the administrator on the Sharing Options page. At least one staff member must be set up to receive files at all times.

 **Note:** Only the administrator is enabled to receive files from clients by default. When other staff members are added to File Share, they will not be able to receive files from clients until the administrator performs the procedure below.

To change the list of staff who can receive files on File Share, do the following:

1. Select **Manage > Sharing Options** on the menu bar to view a list of all staff members set up in File Share.



**Note:** This option is only available for the firm administrator.

2. If needed, use search to locate the staff members for whom **you want to enable or disable** sharing options. You can also click a column header in the list
3. Select the check box for each staff member to add to the list of staff members who can receive files **from clients**. Clear the check box for each staff member you want to remove from the list.
4. Click **Done**.

## Updating Your Profile

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To update the information in your user profile do the following:



1. Click **My Profile** on the menu bar.
2. Edit any of the [user options](#) as needed.

Item	Description
<b>First Name</b> <b>Last Name</b>	Edit your name as needed. Both a first and last name are required.
<b>Email</b>	Edit your email address as needed. <b>Note:</b> If you edit your email address, you must re-log in to the system.
<b>Notifications</b>	Select the check box for each notification you want to receive. Clear the check box for notifications you do not want to receive. <ul style="list-style-type: none"><li>▪ <b>Sharing</b> notifications are sent when you share a file in File Share.</li><li>▪ <b>Download</b> notifications are sent when someone downloads a file that you shared via File Share.</li></ul>
<b>Display [#] files and sort by [Column]</b>	Select the number of files that you want to display on each file list page, and then select the column to sort the list by. The settings selected here apply to all the file list pages.
<b>Display [#] users and sort by [Column]</b>	Available for firm administrators only. Select the number of users that you want to display on the Users page, and then select the column to sort the list by.
<b>Password</b>	Click <b>Change Password</b> , and then follow the on-screen instructions.

3. Click **Save**.

## Using the Users Page

File Share administrators can manage File Share users from the Users page. To open the Users page, select **Manage > Users** on the menu bar.

If needed, you can change the number of entries displayed on this page, as well as the default sort field for the list. [See \*Updating Your Profile\* on the previous page for instructions.](#) Your selections are retained when you exit and later return to File Share.

To find a specific user on this page, enter all or part of a name or email address in the text box above the list. As you type, the list updates to show only users with a name or email address that matches your search text.

## Tasks Performed on the Users Page

The following tasks can be performed directly on this page:


### Edit a user's type, activation status, or share rights.

The user type, activation status, and sharing rights can be edited in the list if you are using a desktop computer or tablet. To edit this information on a mobile device, you must open the full user profile.



1. Hover the pointer over the user you want to edit.
2. Select options in the following columns as needed.
  - **Type**. Select a different user type for this user.
  - **Active**. Select or clear this check box to activate or deactivate the user.
  - **Share**. Select or clear this check box to grant or deny the user sharing rights.

### Send an email to a user.

Do one of the following to start a new email to a user:




- On a desktop browser, click the email address for a user in the list.
- On a mobile device browser, click the email icon  for the user.

### Delete a user.

1. Do one of the following:
  - On a desktop browser, hover the pointer over the user to be deleted.
  - On a mobile device, tap the name of the user you want to delete.
2. Click the delete button . 
3. Click **Delete** on the confirmation page.

## Opening the User Profile

Changes other than those noted above must be made on the user profile. Do one of the following to open the full user profile:

- In a desktop browser, hover the pointer over the user, and then click the user icon .
- In a mobile browser, tap the user name, and then click the user icon . 

## Adding Users

---

Firm users can use the procedure below to add users.



**Note:** Users can also sign up for a File Share account using the Register link on the File Share home page.

To add a user, do the following:

1. Click **Add User** on the menu bar.
2. Enter the user's first and last name.
3. Enter the user's email address. An automated email with login information will be sent to this address after the user is created.
4. Leave the **User Active** box selected to allow the user to log in immediately after the user is saved. If you clear the box, the user will not be able to log in until you return to this page and select this box.
5. If you are the administrator, select the [user type](#) for this user. The user type determines the tasks that the user can perform. Other staff users cannot select a user type.

Field	Description
<b>Administrator</b>	<p>Users who work for the firm and can perform all the following tasks:</p> <ul style="list-style-type: none"> <li>▪ Create, modify, and delete other users</li> <li>▪ Access all files stored in File Share</li> <li>▪ Modify firm information for File Share</li> <li>▪ Share files with all users</li> </ul>
<b>Staff</b>	<p>Users who work for the firm and can perform the following tasks:</p> <ul style="list-style-type: none"> <li>▪ Create new users</li> <li>▪ Share files with all users</li> </ul> <p>By default, new staff users will not be able to receive files from clients. If the staff member needs to be able to receive files from clients, perform the</p>

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Field	Description
	additional set up in the topic <i>Selecting Staff Members Who Can Receive Files from Clients</i> on page 9.
<b>Client</b>	Users who are clients of the firm. They can share files with staff members the firm has specified on the <a href="#">Manage &gt; Sharing options</a> page. They can also download firm files and any files assigned to them.

- If the user should be permitted to share files in File Share, select the **Share Files** option. Clear this box to prevent the user from sharing files.
- Select **Limit Sharing** to specify the maximum amount of space that files shared by this user can use in File Share. If you select this check box, you also must enter an amount in MB. Clear this box to allow this user to share files as long as space is available to the firm.



**Note:** Setting this value greater than the amount of space available to the firm will not allow the user to exceed the firm's limit.

- In the Notifications box, select the check box for the [types of notifications](#) the user should receive.

Notification Type	Description
<b>Sharing</b>	This notification is a copy of the email that is sent to the file recipient when this user shares a file.
<b>Download</b>	This notification is sent to the user when someone downloads a file that was shared by this user.

- Click **Add**.

## Editing Users

Administrators can use the instructions below to edit information for a user on the user's profile.







**Note:** A user's user type, activation status, and sharing rights can also be edited directly on the User list page. See *Using the Users Page* on page 11 for more information.

To edit a user, do the following:

1. Select **Manage > Users** on the menu bar.
2. [Open](#) the user's profile.

Do one of the following:

- In a desktop browser, hover the pointer over the user, and then click the user icon .
  - In a mobile browser, tap the user name, and then click the user icon .
3. Revise the user's information as needed. In addition to changing the user's name and email information, you can also do any of the following:
    - **Change the user's activation status.** Select or clear the **User Active** check box to activate or deactivate the user.
    - **Change the user type for the user.** Select a new user type for the user.
    - **Change whether the user can share files.** Select or clear the **Share Files** box to indicate if the user should be able to share files.
    - **Change the sharing limit for the user.** Select or clear the **Limit Sharing** box to indicate if there should be a sharing limit. If you have applied a sharing limit, you can also change the maximum sharing size.
      -  **Note:** Setting this value greater than the amount of space available to the firm will not allow the user to exceed the firm's limit.
    - **Change the notifications the user receives.** Select or clear the check boxes for each notification to indicate which notifications the user should receive.
      -  **Note:** See *Adding Users* on page 13 for more information about the information included in the user profile.
  4. Click **Save**.

## Using the All Files Page

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The All Files page lists all the files stored in File Share. Only the File Share administrator can access this page. To open the All Files page, select **Manage > Files** on the menu bar.

The administrator can perform the following file management tasks on this page:

- [Download files](#)
- [Reassign files](#)

- [Delete files](#)
- [Email the file owner or recipient](#)

Click a link below to learn more about using this page.

[Tell me how to find files in the list.](#)






Use the following tools to locate files in the list. Keep in mind that if you select files in the list and then perform any of these actions, your selections will be cleared.

- **Search.** Enter all or part of a file name or user name in the Search text box above the list. As you type, the file list updates to include only files with file names or user names matching your search criteria.
- **Sort.** Click a column header to sort by that column. You can toggle between ascending and descending sorts by clicking the header again. If you leave the page, File Share retains your selected sort column.
- **Paging.** If there are more files in the list than can be displayed on one page, click an arrow or page number beneath the file list to move from one page to another.





**Note:** You can set a default sort column and the default number of files to display per page in your [user profile](#).



[Tell me about the buttons on this page.](#)

Button	Description
 <b>Bulk Download</b>	Displays only when a check box is selected in the file list. Click to download the selected files that are visible on this page. The downloaded files are packaged in a ZIP file named "FileShare.zip."  <b>Note:</b> Downloaded ZIPs can be no larger than 128 MB.
 <b>Reassign Files</b>	Displays only when a check box is selected in the file list. Click to reassign the selected files that are visible on this page to a different user. You can reassign ownership of the files, as well as who the files are shared with.
 <b>Bulk Delete</b>	Displays only when a check box is selected in the file list. Click to delete the selected files that are visible on this page.
	Displays in the file list next to the Owner and Shared With columns when you hover your



Button	Description
<b>Email</b>	pointer over a file in the list. Click this button to create an email addressed to the person the icon is associated with.
  <b>Delete</b>	Displays to the right of the Downloads column in the file list when you hover your pointer over a file in the list. Click this button to delete the file.

[Tell me about the information in the file list.](#)

Item	Description
<input type="checkbox"/> <b>Selection Check Box</b>	Used to select one or more files to perform an action on. Select the check box in the header row to select all files displayed on the page. If you select multiple files at one time, additional buttons that enable bulk actions display above the list.
<b>File Name</b>	Displays the name of the file, including the file name extension. Click a file name to download the file.
<b>Shared On (CST)</b>	Displays the date and time in Central Time that the file was added to File Share.
<b>Size</b>	Displays the size of the file.
<b>Owner</b>	Displays the name of the person who shared the file.
<b>Shared With</b>	Displays the name of the person who the file was shared with. When the file is a public file, this column displays "Everyone."
  <b>Downloads</b>	Displays the number of times the file has been downloaded by the people listed in the Shared With column.