

ShareFile Handbook

Please note that this is for use after activating your account, go to your activation email for more information.

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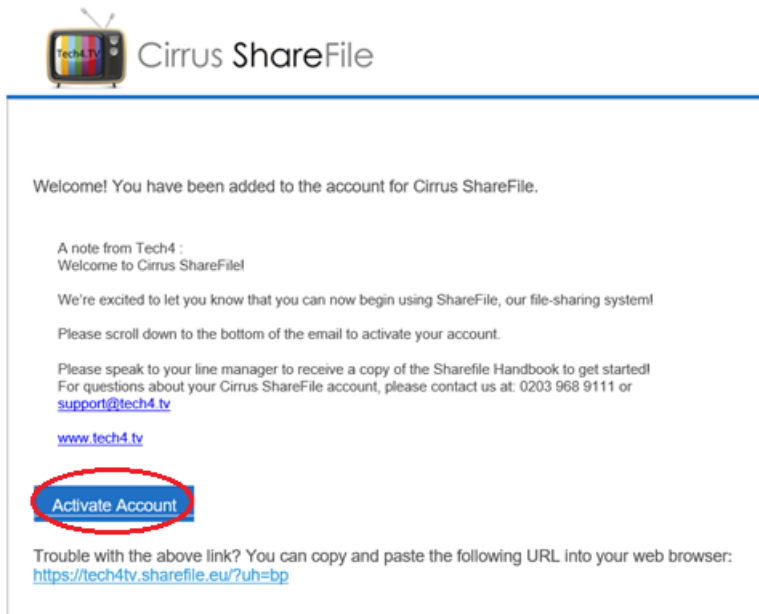
Initial Setup

Welcome to ShareFile!

We're excited to let you know that you can now begin using ShareFile, our file-sharing system!

You should have received an email from **ShareFile Support** with the subject name:
Tech4 Administrator Added You to ShareFile.

Please scroll down and click the Activate Account button



- Enter your first name, last name, and mobile number.
 - Enter your verification code and verify
- Enter your password
 - Passwords must meet the following requirements:
 - at least 1 upper case letter
 - at least 1 lower case letter
 - at least 1 number
 - at least 1 special characters
 - at least 8 characters in length
 - Passwords should match
- Verify your device
 - Verify your device by either text message, phone, or the authentication app.
 - Text message is used most (**select text message**)

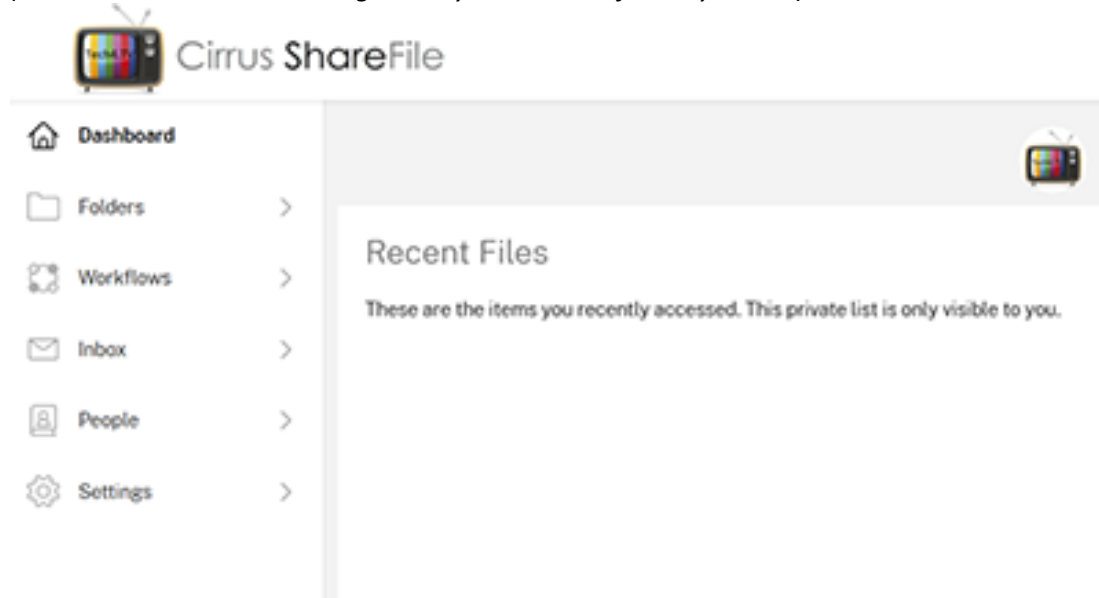
You are now setup on Sharefile!

A confirmation email will be sent your email address with the portal sign-in page and your email.

Sharefile Portal

Portal access: <https://tech4tv.sharefile.eu/dashboard>

(We recommend bookmarking this in your browser for easy access)



Sharefile Software

Our Cloud-API (Desktop Software) is called **Sharefile**.

This allows Sharefile to run as an application on your laptop, computer, and phone.

- Windows users

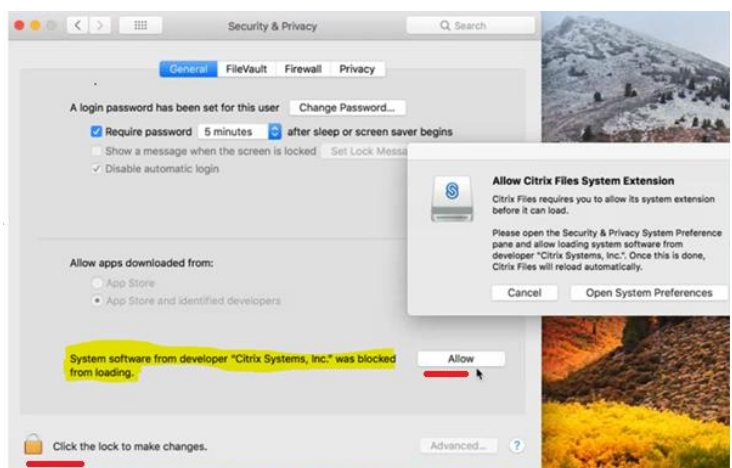
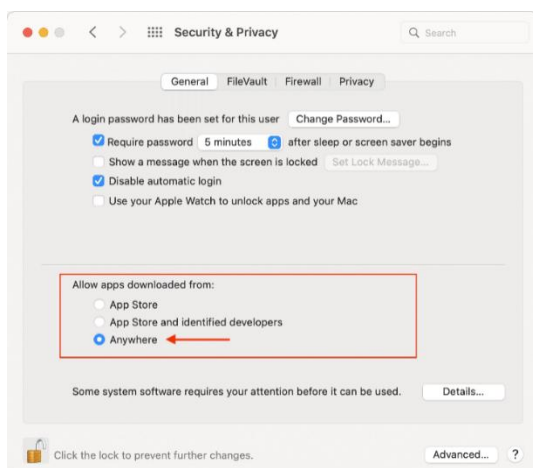
[Download](#) and install Sharefile for Windows:

- macOS users

[Download](#) and install Sharefile for Mac

Allow Apps from Unidentified Developers + Enable system extensions.

1. Click on System Preferences
2. From the System Preferences Pane click on Security and Privacy
3. Click on the lock down the bottom left and enter your password
4. Under Allow apps downloaded from, check the Anywhere radio button



1.) Load Startup Options

Shut down your Mac, then press and hold the power button until “Loading startup options” appear.



2) Access Recovery Mode

Click Options, then click Continue.

3) Open Startup Security Utility

In the menu on top of the screen, choose Utilities > Startup Security Utility.

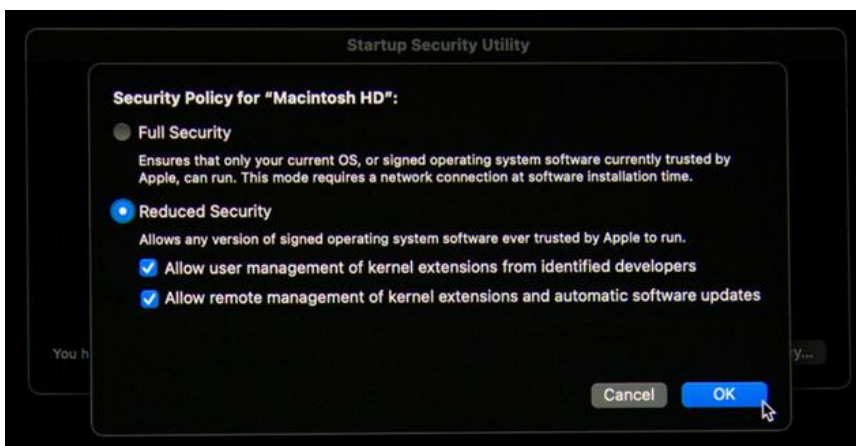


4) Open Security Policy

Select the system you want to modify, then click Security Policy.

5) Select Reduced Security

Select “Reduced Security” and enable “Allow user management of kernel extensions from identified developers” to allow installation of software that uses legacy kernel extensions.



6) Enter Administrator Password

When asked to authenticate, select an administrator account, and enter its password to apply the changes to the security policy.

7) Restart System

In the Apple menu, choose Restart to restart the system.

Phone & Tablet Apps

- iOS (iPhone, iPad)

Open the App store application on your device.
Search for Sharefile.
Tap Get



ShareFile® 4+

Citrix Systems, Inc.

Designed for iPad

Free

Tap the Sharefile icon to open.
Type your Sharefile username and password.

- Android

Open the PlayStore application on your device.
Search for Sharefile.
Tap Install

ShareFile

Citrix

3.9★
588 reviews

100K+
Downloads

PEGI 3

Install

Share

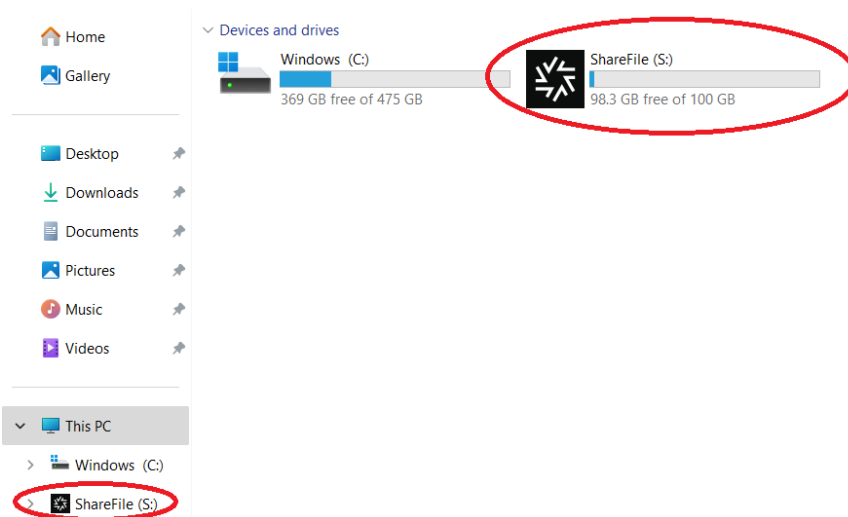
Add to wishlist




Accessing Files

- Windows

- Click on your file explorer 
- Click 'This PC' on the lefthand pane.
- Double click the Sharefile drive, by default it's S: drive.



- Favourites

Right click on the file or folder, go to  ShareFile > select Add to favourites
You can also login to the Sharefile online portal [here](#) and add a favourite folder.
Click on Folders, Shared Folders then click the star icon ☆ next to the folder.

- Personal Folders

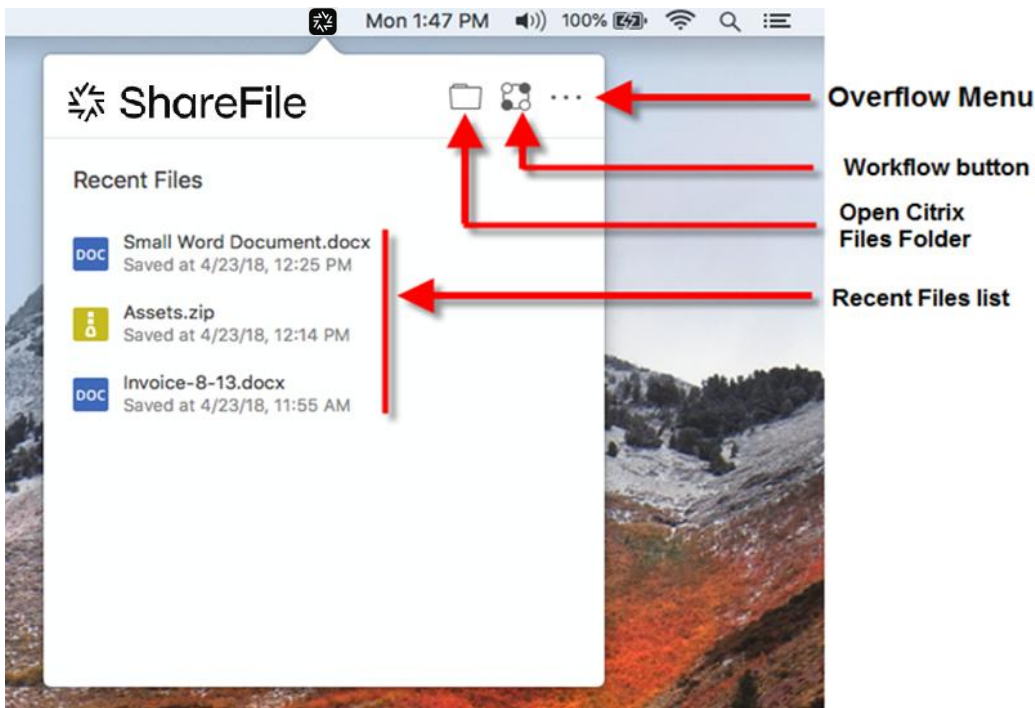
This is your private and personal folder, only you have access to this folder.

- Shared Folders

The Shared Folders section of your account contains all folders (created by you or other users) that you have been granted access to


- macOS

After installation, a volume named “Sharefile” will appear. You may access this volume by clicking on the Sharefile menu bar item and then clicking the folder icon. It will also appear in the Favourites sidebar in Finder windows. This volume displays all the files and folders from your Sharefile account.



- **Recent Files** - Files that have been uploaded or edited will appear in the list of recent files. Double click on a file to open it.
- **Overflow Menu** - Access Preferences, Send Feedback, Help Launch Website, and quit/exit the Sharefile application.
- **Workflow button** - Open a window containing Workflows where you can view.

• **Favourites**

Right click on the file or folder, go to  ShareFile > select Add to favourites
 You can also login to the Sharefile online portal [here](#) and add a favourite folder.
 Click on Folders, Shared Folders then click the star icon ☆ next to the folder.

• **Personal Folders**

This is your private and personal folder, only you have access to this folder.

- **Shared Folders**

The Shared Folders section of your account contains all folders (created by you or other users) that you have been granted access to.

Uploading Files

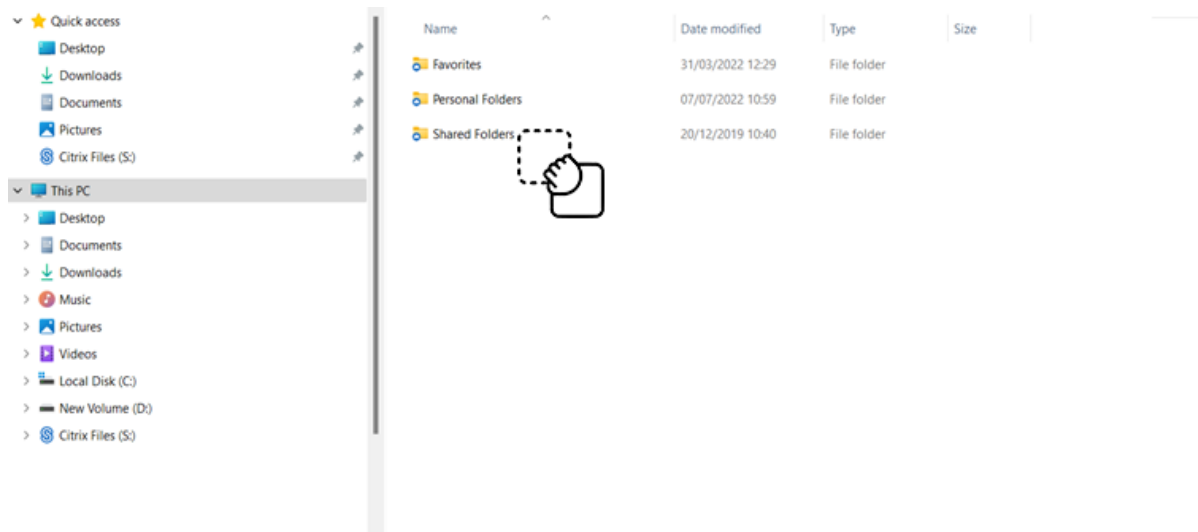
- Windows

Upload Files via the Sharefile application.

Select the file(s) you want to upload.

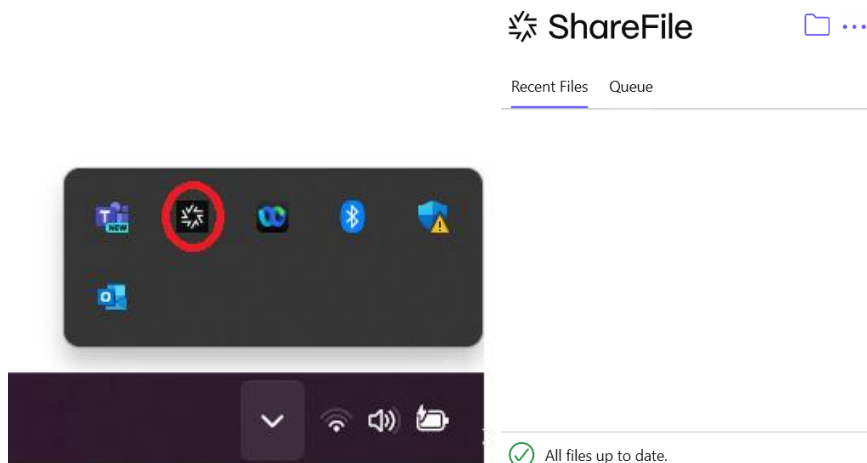
Open the Sharefile folder via File Explorer.

Drag the files to your selected folder in the Sharefile (S:) drive in Windows Explorer.



Check your recent and queued files.

- Left click the Sharefile Icon in your Icons tray.

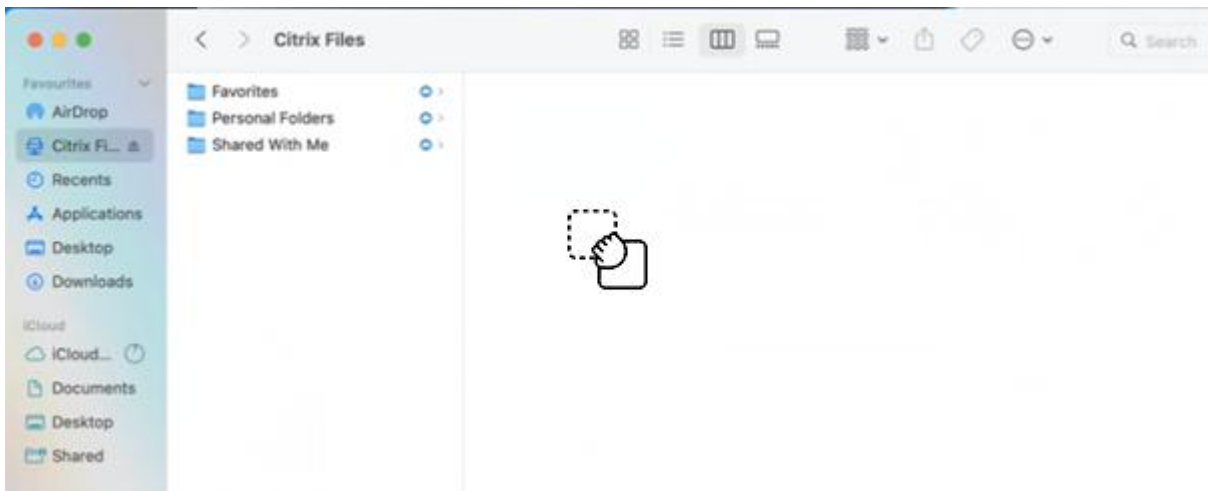


- macOS

Upload Files via the Sharefile application.

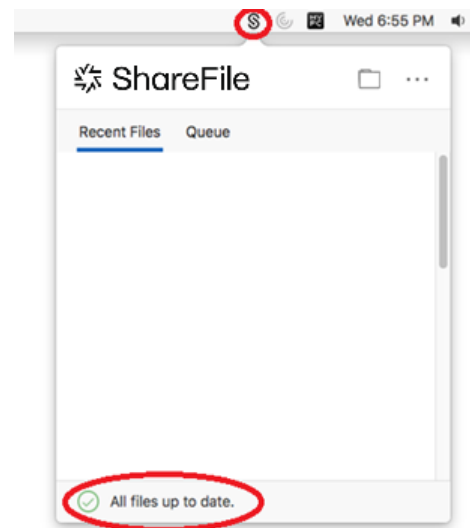
Drag and drop file(s) or folder(s) from the Sharefile folder to another folder on your computer.

You may also copy and paste files and folders.



Check your recent and queued files.

Click on the menu bar and select the Sharefile icon.

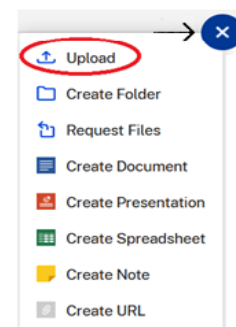


- Sharefile Portal

Upload Files via the Sharefile [portal](#).

Option 1. Drag the files directly to your selected folder on the web portal.

Option 2. Click the blue X button and choose Upload.

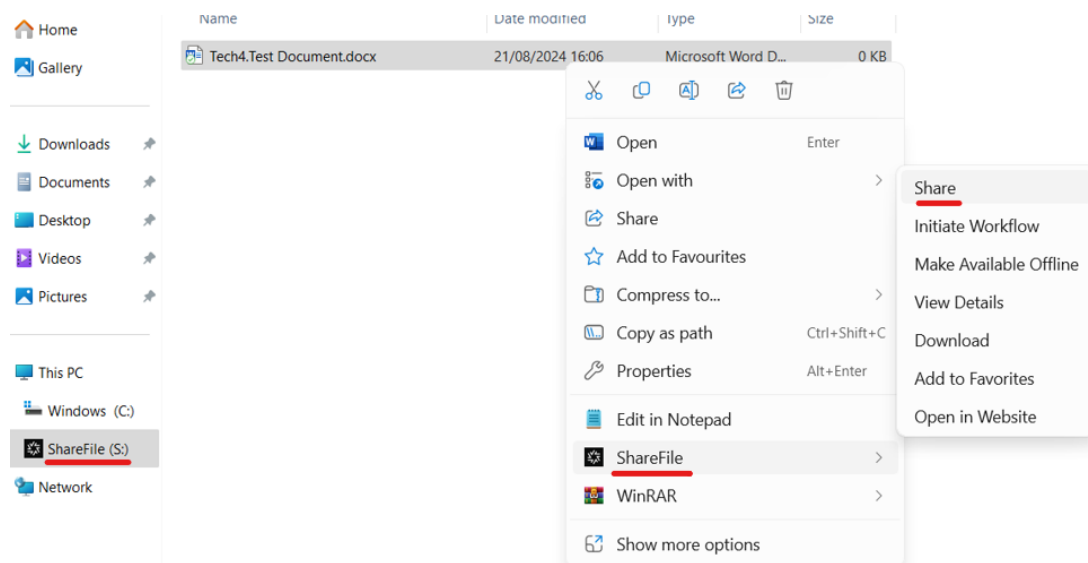


You will also find more options available, please check the [website](#) for more information.

Sharing Files

- Windows

Right click on the file you would like to share, go to Sharefile -> Share



A new window will appear with more options.

- Allow people with this link to:
 - Download **only**
 - Edit (**required to sign in**)
- Who can access this link
 - Anyone (No information required)
 - Anyone (Public, must enter a name and email)
 - Client and employee users (after signing in)
 - Employee users (after signing in)
- Access expires
 - Here you can limit the days of access to the file (Change this to your preference)

- Notifications
 - Here you can be notified when the file is accessed, you will receive an email.

ShareFile

Edit options

Access Options

Allow people with this link to

Download

Who can access this link

Client and employee users (after signing in)

Access expires

never

Always link to the latest version of the file

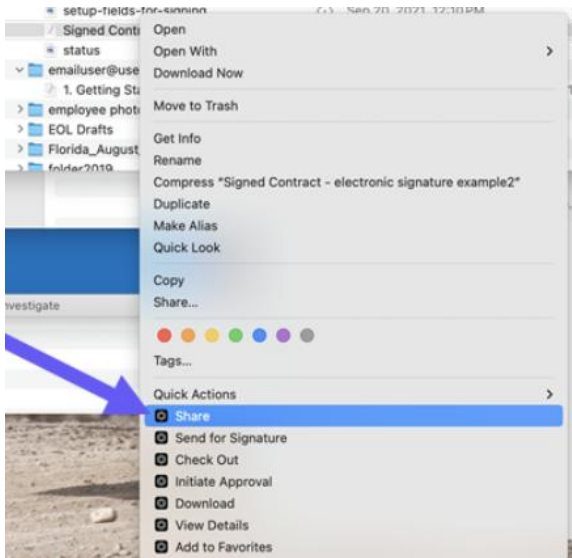
Notifications

Notify me when this is accessed

Save Cancel

- macOS

Navigate to the file that you want to share from the ShareFile folder in Finder
To open the menu, use **Control-click** on the file you would like to share.
The ShareFile for Mac menu displays.
Select **Share**.



A new window will appear with more options.

- Allow people with this link to:
 - Download **only**
 - Edit (**required to sign in**)
- Who can access this link
 - Anyone (No information required)
 - Anyone (Public, must enter a name and email)
 - Client and employee users (after signing in)
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Edit options

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Client and employee users (after signing in)

Access expires

never

Always link to the latest version of the file

Notifications

Notify me when this is accessed

Save

Cancel

Collaboratively Editing Files Online

Using ShareFile [Portal](#) allows you to collaboratively edit a file.

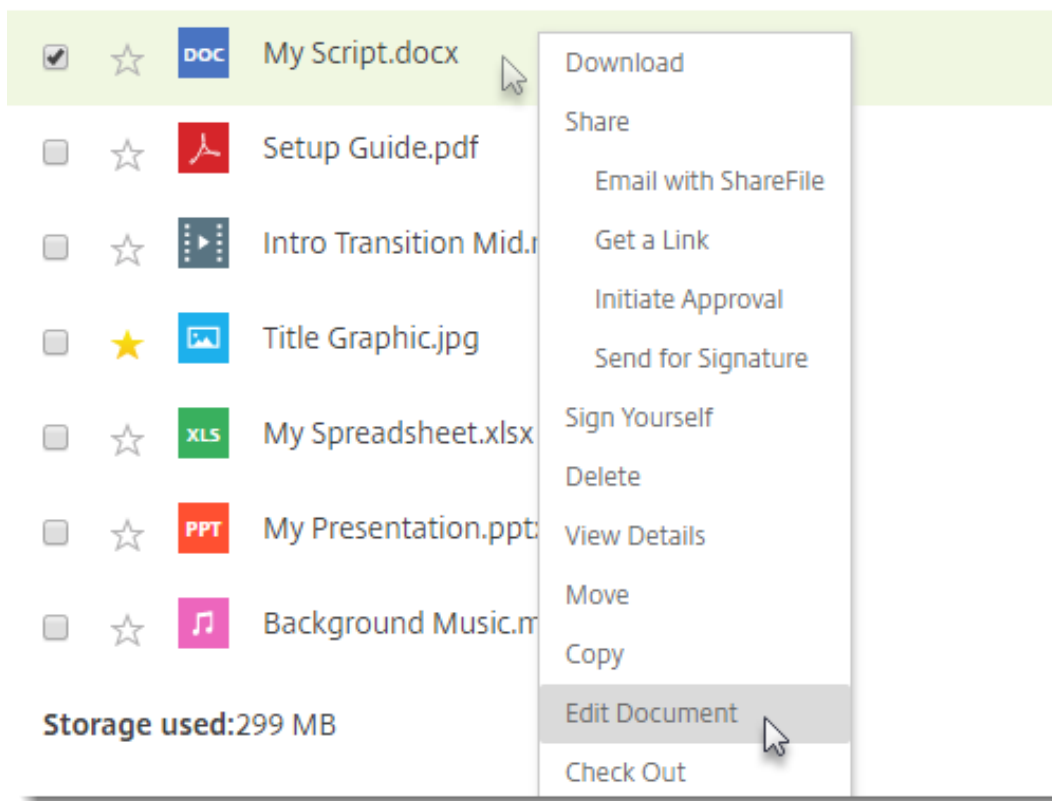
There are some limitations to this, files need to be in the latest version of Microsoft Office.

Excel spreadsheets can't exceed 5MB.

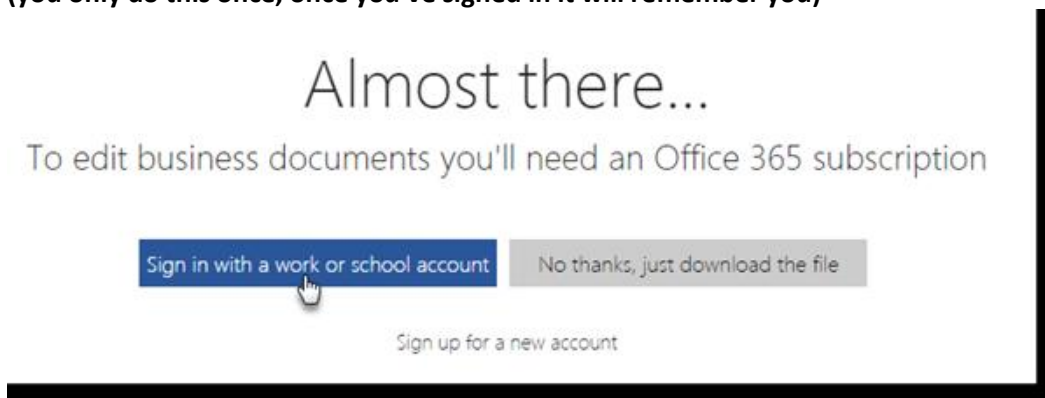
See the tutorial videos on the Portal dashboard for more information.

Multiple users can edit a file simultaneously all from within the ShareFile portal.

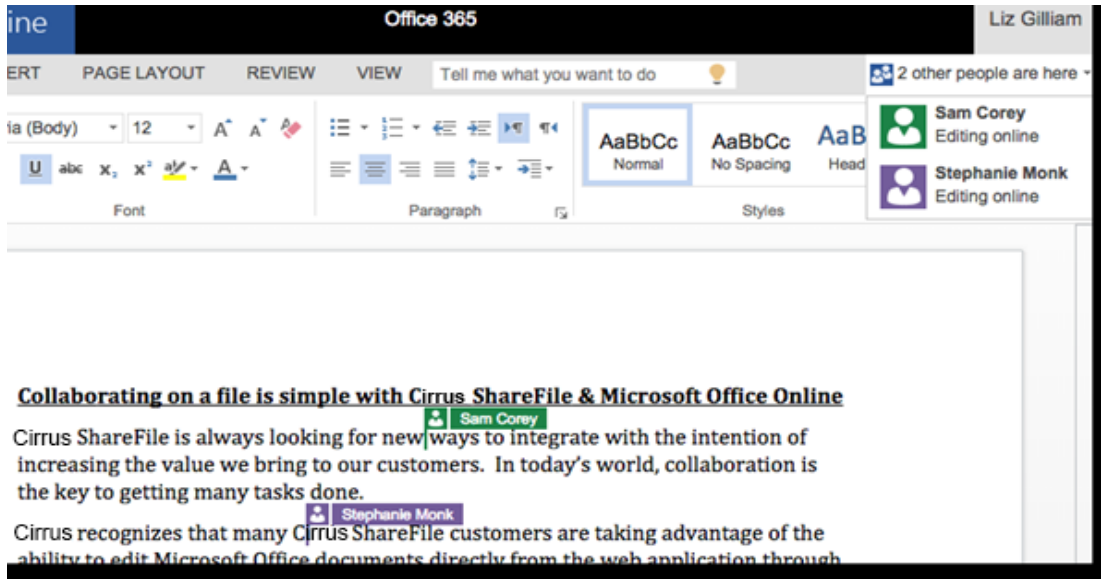
To co-edit a document or join an active editing session, right-click the file and choose the **Edit Document** option.



You will be prompted to verify your Microsoft Office credentials before accessing your file.
(you only do this once, once you've signed in it will remember you)

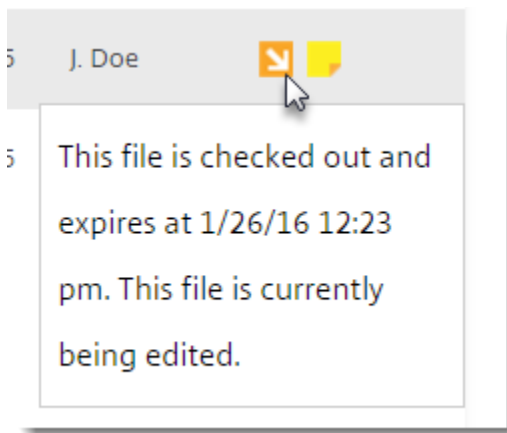


After verifying your Microsoft credentials, you may use the web-based editor to modify the file. Other users in the editing session are denoted by coloured cursors within the document. You can also view editing users in the upper right corner of the editor menu.



How do I know when a file is being edited?

A file that is currently being edited is denoted by the orange icon shown below. Hovering your cursor over the orange icon will display the status of the file.

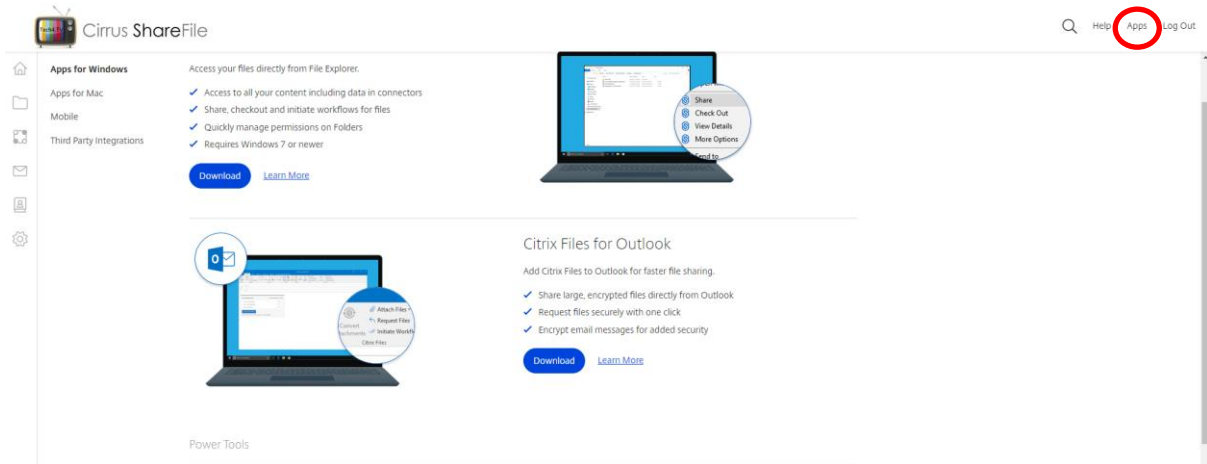


Changes to the file will automatically be saved. You can view the Save status of your file at the bottom of the editor. Please ensure that it says "**Saved to ShareFile**" before exiting the editor.

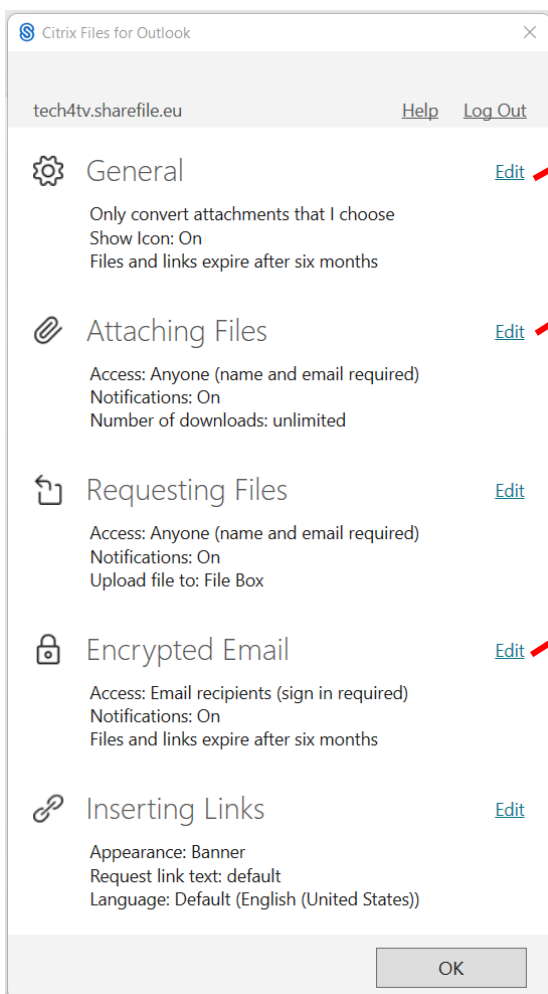
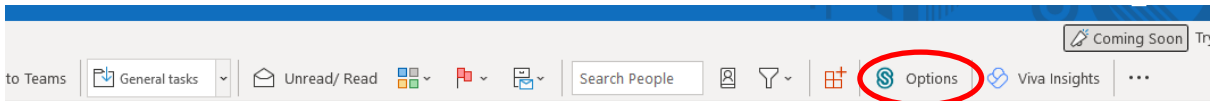
Sharefile For Outlook

You can find this from the Sharefile [portal](#) by going to 'Apps' in the top right corner.





Once you have downloaded and installed the application, open Outlook and the Sharefile icon will appear in the top right corner of your toolbar.



You can adjust this – can send attachments up to 100GB
(Converts to a download link)

Here you can adjust permissions of who you want being able to access the attachments you send.

Turning this on is useful if you need to send personnel files.



Online only files: These files and folders are stored on the cloud. These files and folders are not stored on the local device.

✔ Only files or folders marked as “Make available offline” display a green circle with the white check mark. These files or folders are downloaded to your device and are available offline.

✔ Mixed state folder or cached file: This occurs when folder contents are in the various modes including online, offline, and cached.

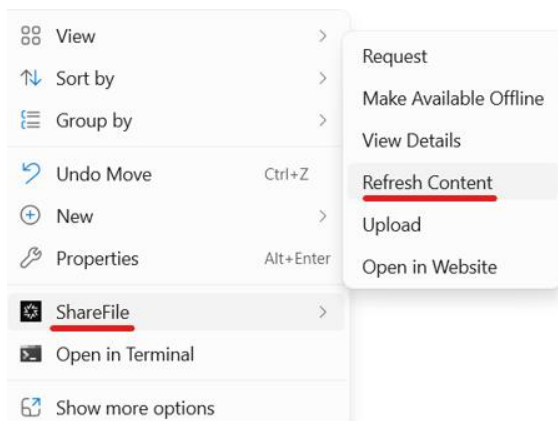
🔒 The file or folder is checked out.

Troubleshooting Sharefile

- Windows

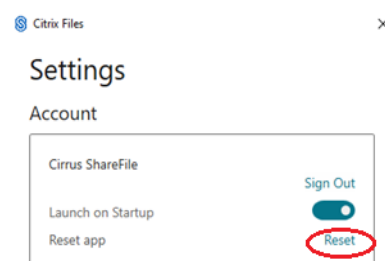
Files not syncing?

Right click the white space within the File Explorer

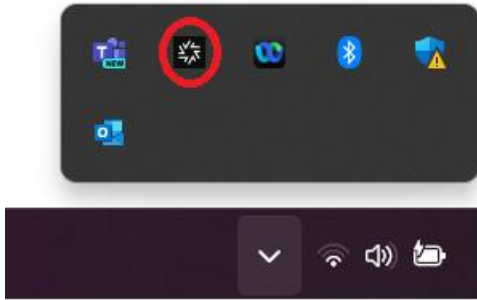


Click ShareFile, Refresh Content

Reset your Sharefile application



- Right click the Sharefile Icon
- Click settings.

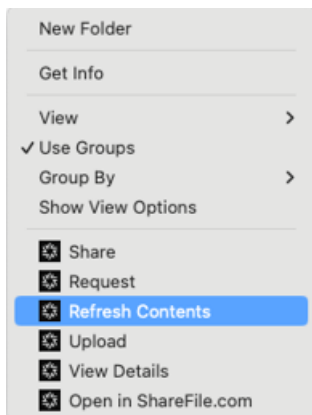


- Click on the 'Reset' app.
- This will sign you out and reset the application.
- You may need to enter the subdomain again which is: tech4
- Now continue to login with your Sharefile username and password.

- macOS

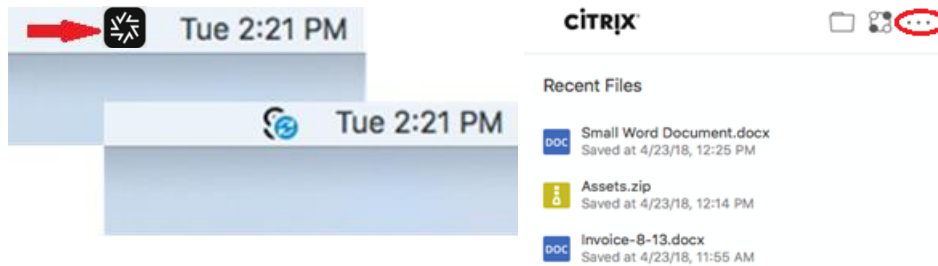
Files not syncing?

Right click the white space within the Finder
Click ShareFile, Refresh Content



Reset your Sharefile application

- Click the Sharefile Icon
- Now click on the three dots ...



- Go to preferences
- App settings
- Reset app
- You may need to enter the subdomain again which is, tech4
- Now continue to login with your Sharefile username and password.