

EasiShare Web Portal User Guide

V11.0

(for EasiShare User)





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Table of Contents

1	Introduction.....	6
1.1	Introduction to EasiShare.....	6
1.2	EasiShare Web Portal.....	6
2	Login.....	7
2.1	Getting Started.....	7
2.2	Accessing EasiShare	9
2.3	Switching Views	10
2.4	Concurrent Login	13
3	Folder Operations	13
3.1	Create a New Folder	13
3.2	Rename a Folder.....	14
4	Upload Files.....	15
4.1	Using Upload Feature.....	15
4.2	Using “Drag & Drop” Method.....	16
4.3	Check Upload Status.....	17
4.4	Uploading a Virus File	18
5	File Operations	19
5.1	Copy/Move.....	19
5.2	Download.....	21
5.3	Delete.....	22
5.4	Recycle Bin.....	23
5.5	Preview	24
5.6	Preview a file with Viewer Permissions.....	26
5.7	Document Tag.....	28
6	Share.....	30
6.1	Share	31
6.1.1	Share with User Group.....	33
6.1.2	Share with Download Permission.....	35
6.1.3	Share with ‘View Only’ Permission.....	36
6.1.4	Share with Link Expiry	37
6.1.5	Share with One Time Password (OTP)	38



6.1.6	Share and Receive Notifications When Users Accessed the File/Folder(s)	39
6.1.7	Share with Number of Download Attempts	40
6.2	Access Shared Files/Folders	41
6.2.1	Email Notifications	41
6.2.2	Shared In	42
6.2.3	Shared Out	42
6.3	Edit/Remove Share	43
6.3.1	Edit from File's Original Location	43
6.3.2	Edit from Shared Out Folder	47
7	Manage Folder to Collaborate with Internal Users	48
7.1	Manage Folder for Collaboration	48
7.2	Collaboration Permission Types	50
7.3	Manage Folder	50
7.4	Manage Folder to User Groups	51
7.5	Manage Drive Permission	53
7.6	Access Shared Drive	54
7.7	Shared Drive Information	55
7.8	Remove My Access from Shared Drive	56
8	File Request to Receive Files from External Users	57
8.1	File request	57
8.1.1	File Request with Link Expiry	59
8.1.2	File request with OTP	60
8.1.3	Receive Notification When External Users Upload Files	61
8.1.4	Restrict Number of Upload Attempts	61
8.1.5	Restrict File Types	62
8.1.6	Limit the File Upload Size	63
8.2	Upload Files Using File Request	64
8.3	Access Uploaded Files on File Request	65
8.4	Edit File Request	66
8.5	Revoke File Request	67
9	Check in/Out	68
9.1	Check Out a File	68



9.2	Check In a File.....	70
9.3	Discard Check Out.....	72
10	Versioning.....	74
10.1	View File Version	74
10.2	Create New Version.....	75
10.3	Restore Version.....	77
11	Monitor.....	78
11.1	Monitor a file	78
11.2	Monitor a folder	78
11.3	Stop Monitoring a File/Folder.....	82
12	Workflow	83
12.1	Owner Creates Workflow.....	83
12.2	Owner Edits Workflow.....	84
12.3	User Checks Pending Approvals and Remind Approvers.....	86
12.4	Approvers Approve or Reject with Comments.....	86



1 Introduction

1.1 Introduction to EasiShare

EasiShare is a file sharing tool that allows user to share their files across different devices securely and to other users. Documents are stored in a server and readily accessible to its owner and their recipients who have been shared the document. Shared documents have an expiry timer when after a certain period of the time; the access rights are automatically revoked.

1.2 EasiShare Web Portal

The EasiShare Web Portal allows users of EasiShare to manage storage, file, and create upload requests in a web portal. Users will be able to perform create new folder, upload file, download file, modify existing file, create an upload request and more. Most of these functions performed will be directly take effect in Storage.

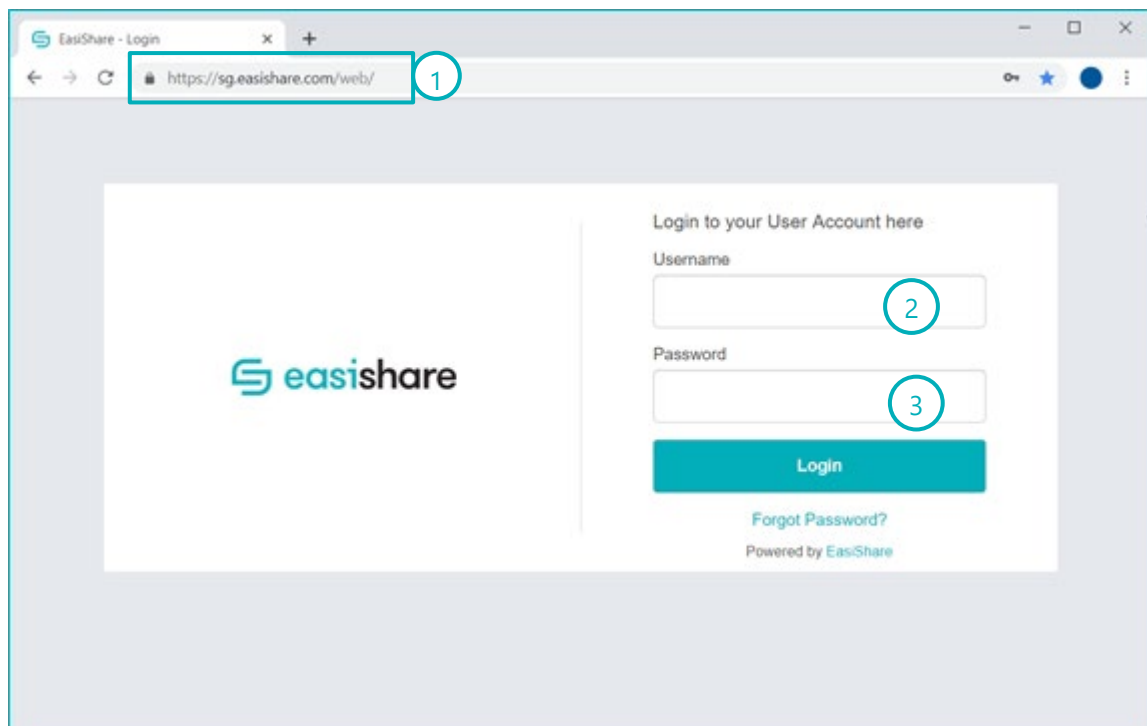


2 Login

2.1 Getting Started

To login:

1. Launch a web browser and access the EasiShare Web Portal via your respective EasiShare domain: **<Insert Client's EasiShare Domain>**
2. At the log in page, enter your **Username** and **Password**.
3. Click **Login**.



**Login Errors:**

If you encounter any error message below,

1. Username entered does not exist. Check that you have entered a correct username. Invalid password entered. Check that you have entered a correct password.

**Invalid username or
password!**

2. Your account has been disabled. Check with your Administrator.

**Your account has been
deactivated. Please contact
your EasiShare administrator.**

3. Your account is locked. Check with your Administrator.

**Your account has been
locked. Please contact your
system administrator.**

4. You must change your password before login.

Please change your password
before proceeding.



2.2 Accessing EasiShare

1. Page will be directed to the page as shown below after logging in. You should see drive(s) that you can access.

The screenshot shows the EasiShare web portal interface. The left sidebar contains a 'Drives' section with the following items: Shared, Shared In, Shared Out, Managed Folders, File Requests, Quick Access, Personal, Human Resource, and Sales. The main content area displays the 'Shared' drive, which contains a list of files and folders. Callouts provide the following information:

- Shared:** Files & Folders that you have shared or been shared by EasiShare users to you.
- File Requests:** Request to non-EasiShare account users for file upload and after they have uploaded the file(s), you can download from here.
- Personal:** Personal Drives dedicated where you have permission to.
- Human Resource / Sales:** Shared Drives/Folders that have been given permission to you by other EasiShare users to collaborate. See whether the owner has used the "Manage" function.

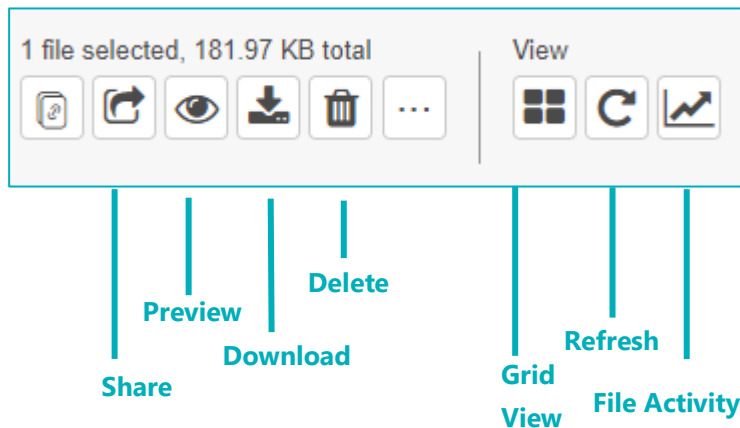
2. On this page, User able to view all the drive(s) assigned are in the Drive List on the left panel. Also can view the actions like create, upload request, search, refresh, Delete, View file activity etc..

The screenshot shows the EasiShare web portal interface with the 'Personal > Finance' drive selected. The left sidebar shows the 'Drive List' with the following items: Shared, Quick Access, Personal, Recycle Bin, Documents, File Requests, Finance, Operation, Projects, Sync, Human Resource, and Sales. The main content area displays the 'Finance' drive content, which includes a table of files and folders. The table has columns for Name, Modified, and Type. The files listed are:



Name	Modified	Type
Bank records - Dec 2020.jpg	05/01/2018 10:01 PM	jpg
Bank records - Jan 2021.jpg	05/01/2018 10:01 PM	jpg
Bank statement.pdf	06/19/2020 11:11 AM	pdf
Bank transaction - Jan 2021.xlsx	12/01/2020 1:55 PM	xlsx
Account books.docx	09/22/2020 3:45 PM	docx

The 'Action buttons' section at the top right of the main content area includes icons for creating, uploading, viewing, deleting, and refreshing. The 'Drive Content' label is positioned below the table.

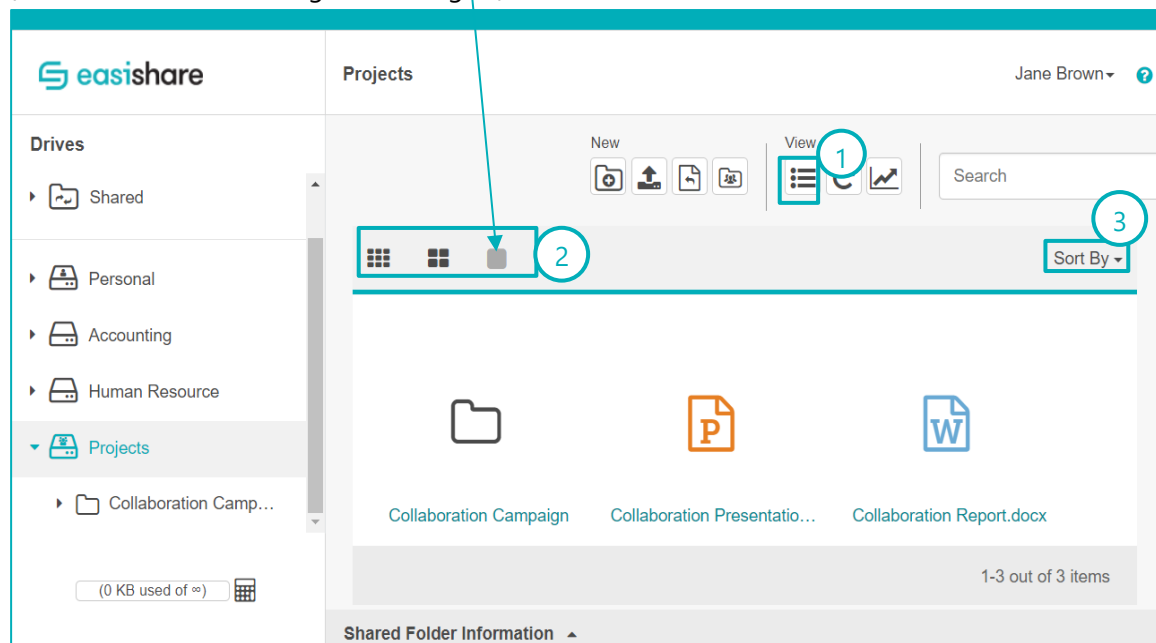
- More tools are located at the left side of the search bar.



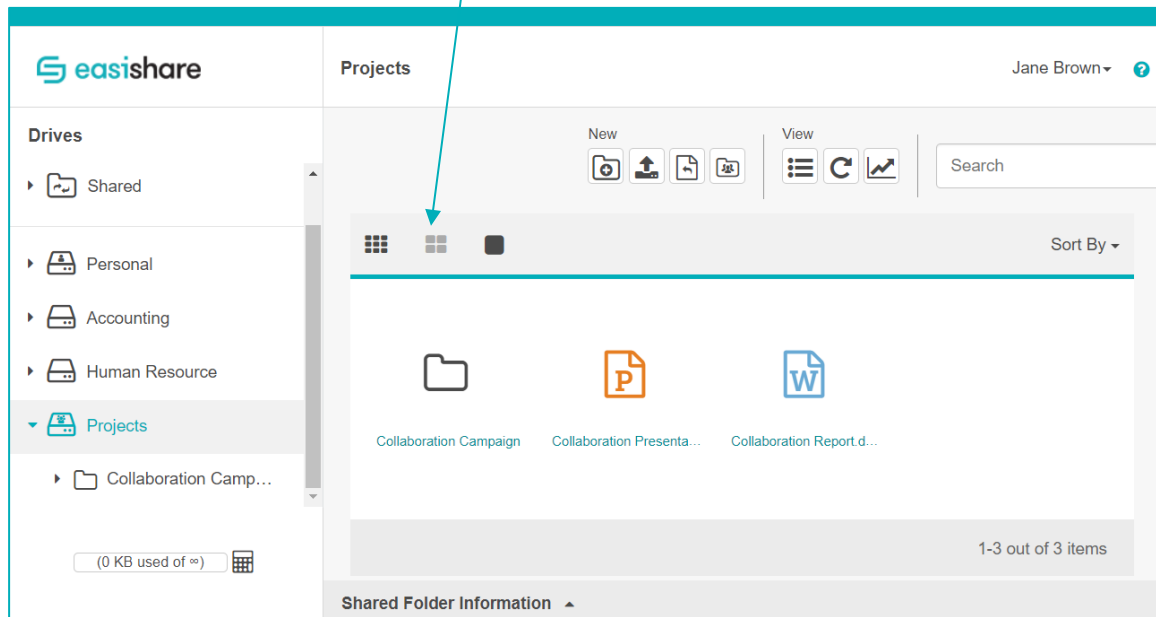
2.3 Switching Views

- Click the Grid view icon  on the Tools menu, if the user is in Grid view mode the icon display will change to List view icon , vice versa.
- Three Sizes of choice are given, from left to right, small, medium and large views.
- User will be able to Sort according to their preference with the help of sorting menu.

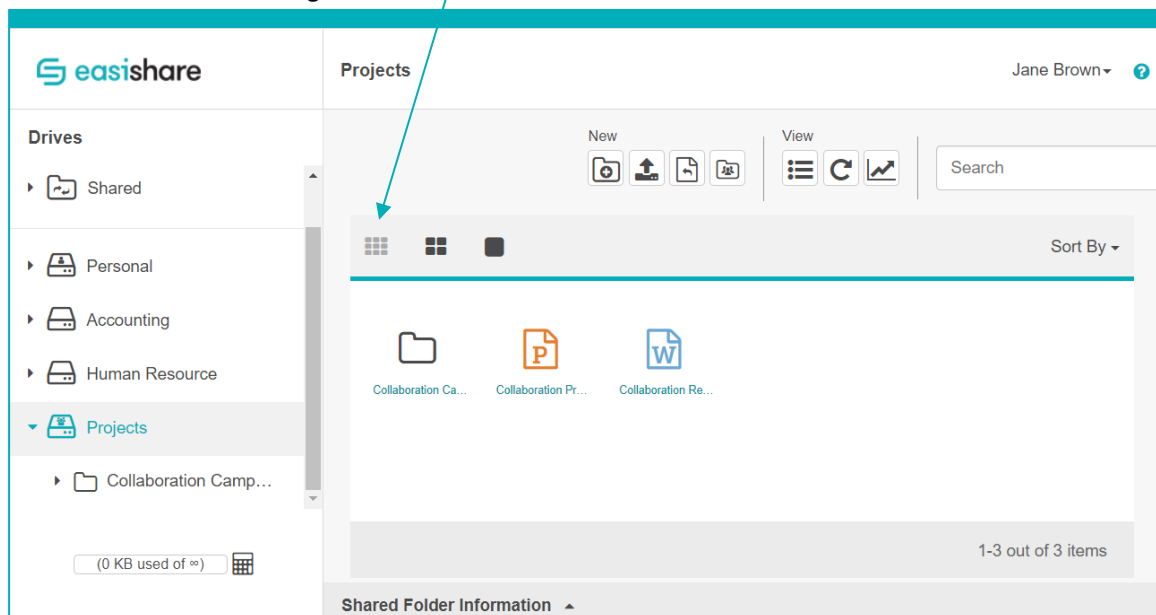
(In Grid mode, where the grids are largest)



(In Grid mode, where the grids are medium)



(In Grid mode, where the grids are small)





(In Grid mode, different types of sorting) *note that the type of sorting remains the same*

The screenshot shows the EasiShare web portal interface in Grid mode. The left sidebar displays a list of drives: Shared, Personal, Accounting, Human Resource, and Projects. The 'Projects' drive is selected, and the main content area shows a grid view of files. A 'Sort By' dropdown menu is open, showing options: Name, Modified, and Size. The files are 'Collaboration Ca...', 'Collaboration Pr...', and 'Collaboration Re...'. The status bar indicates '1-3 out of 3 items'.

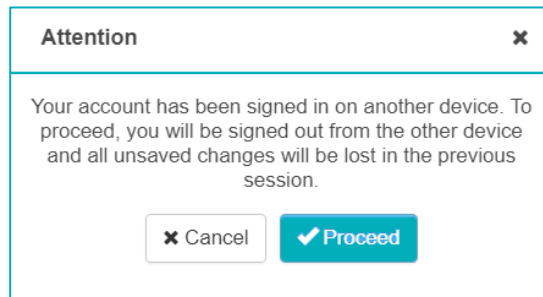
(In list mode)

The screenshot shows the EasiShare web portal interface in List mode. The left sidebar displays a list of drives: Shared, Personal, Accounting, Human Resource, and Projects. The 'Projects' drive is selected, and the main content area shows a list view of files. The files are 'Collaboration Campaign', 'Collaboration Presentation.pptx', and 'Collaboration Report.docx'. The status bar indicates '1-3 out of 3 items'.

Name	Modified	Type	Size
Collaboration Campaign	06/18/2019 3:28 PM		
Collaboration Presentation.pptx	05/09/2019 10:09 AM	pptx	6.51 MB
Collaboration Report.docx	05/14/2019 5:45 PM	docx	125.1...

2.4 Concurrent Login


1. If the administrator has **enabled** concurrent login, the user would be able to login to multiple devices using the same user account.
2. If the administrator has **disabled** concurrent login, the user would only be able to access your user account in one device at a time.
 - If the concurrent access is enforced, the system will display below message to sign out from **previous devices** before **proceeding to login** in the **current device**.

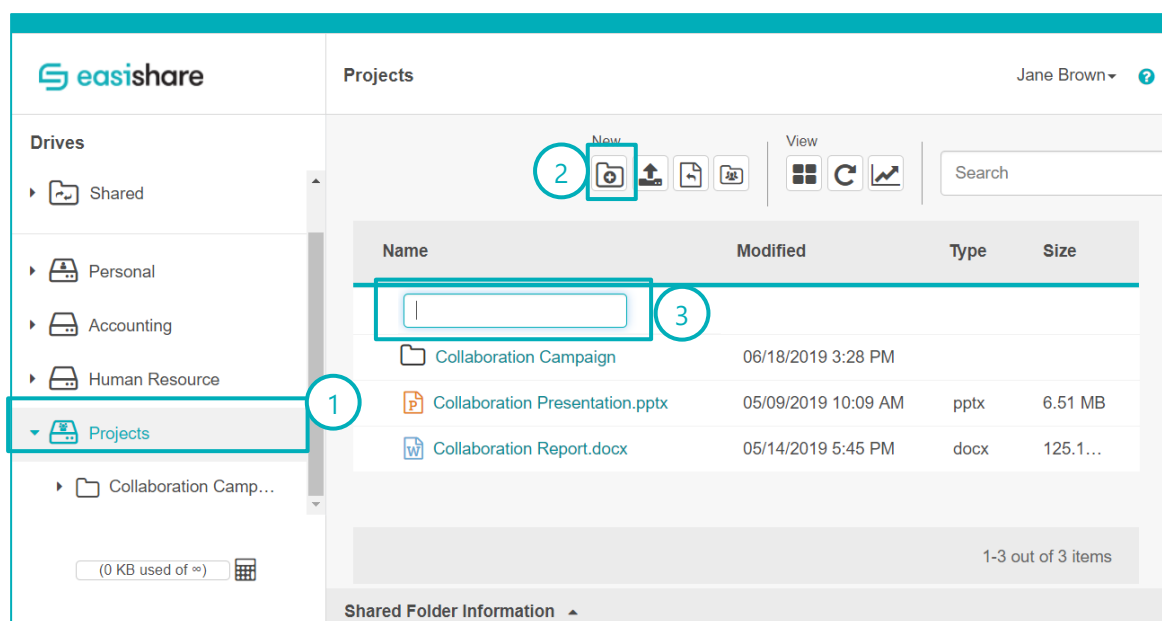


- For the other devices, the same user account would be **automatically** signed out.


3 Folder Operations

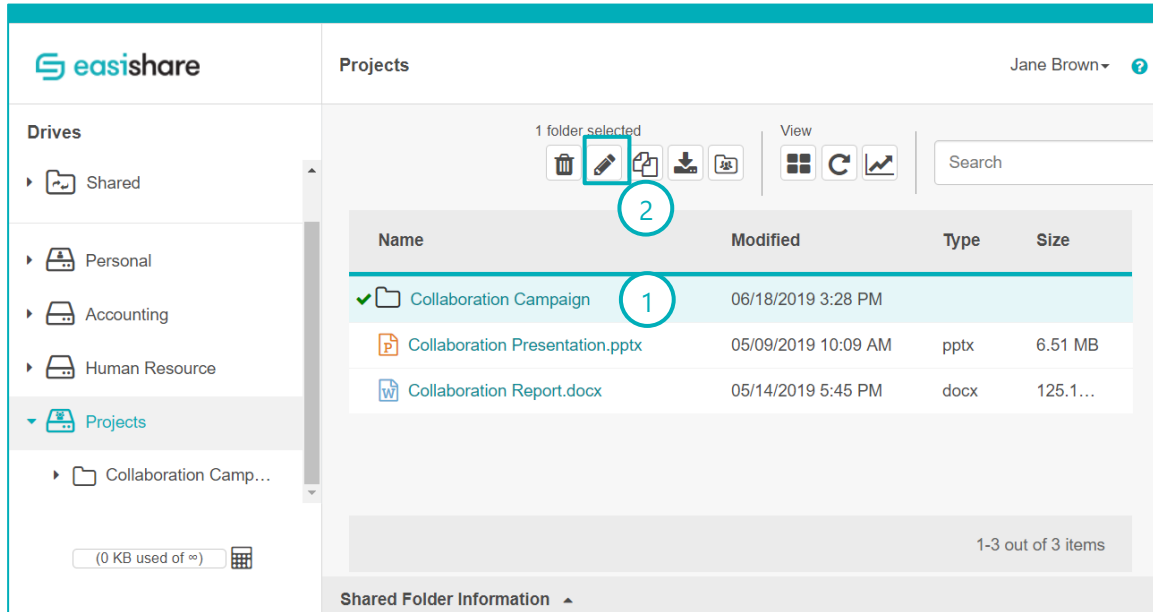
3.1 Create a New Folder

1. Click on a storage located in the **Drive List** along the left panel to navigate to the new folder's location.
2. Click on **New Folder**  along the **Action Pane** located at the top.
3. Enter **folder name** in the input box.



3.2 Rename a Folder

1. Select the folder. To select, click on the white area beside the folder name.
2. Click on Rename  on the Action Pane located at the top.

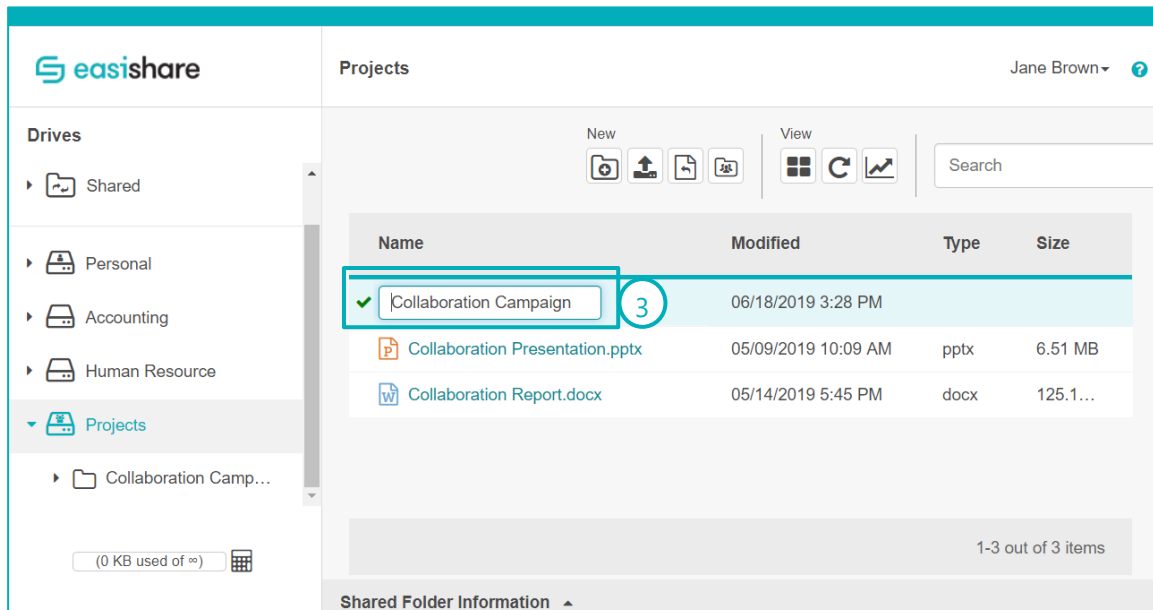


The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar lists 'Shared', 'Personal', 'Accounting', 'Human Resource', and 'Projects'. The 'Projects' drive is selected, showing a folder named 'Collaboration Camp...'. The main area displays the 'Projects' folder contents. A table lists the items:

Name	Modified	Type	Size
✓ Collaboration Campaign	06/18/2019 3:28 PM		
Collaboration Presentation.pptx	05/09/2019 10:09 AM	pptx	6.51 MB
Collaboration Report.docx	05/14/2019 5:45 PM	docx	125.1...

The 'Collaboration Campaign' folder is selected, indicated by a checkmark and a red circle '1'. The top action pane shows icons for 'New', 'Rename', 'Move', 'Copy', 'Paste', 'Delete', and 'Share'. The 'Rename' icon is highlighted with a red circle '2'. A search bar is visible on the right.

3. Enter new folder name.



The screenshot shows the EasiShare web portal interface. The 'Collaboration Campaign' folder is selected, and its name is being edited. A red circle '3' highlights the text input field. The table below shows the items in the 'Projects' folder:

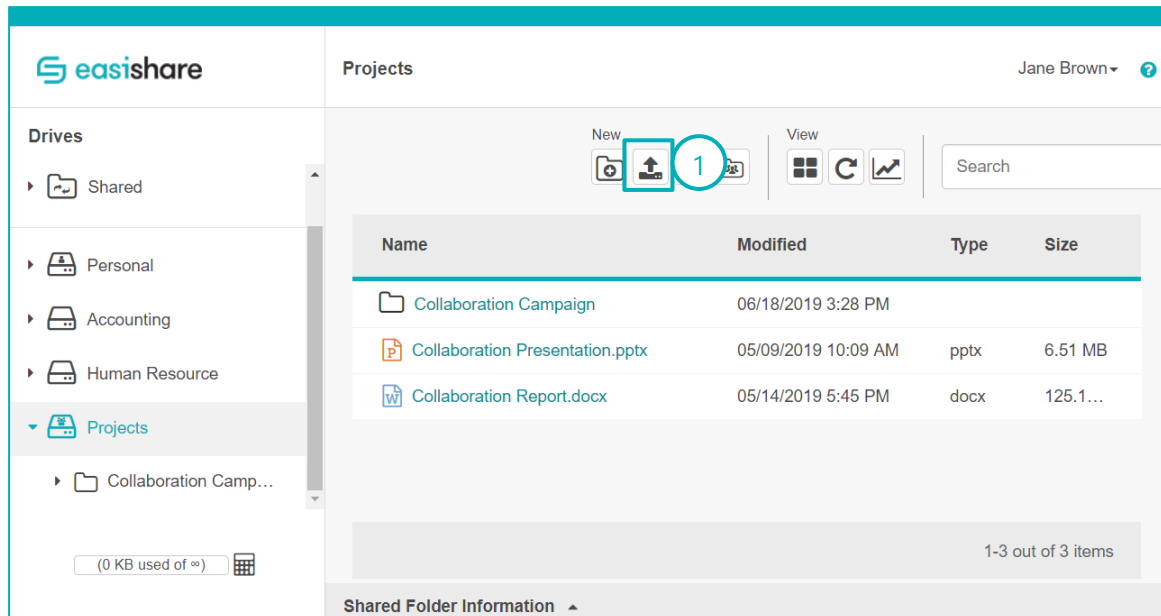
Name	Modified	Type	Size
✓ Collaboration Campaign	06/18/2019 3:28 PM		
Collaboration Presentation.pptx	05/09/2019 10:09 AM	pptx	6.51 MB
Collaboration Report.docx	05/14/2019 5:45 PM	docx	125.1...

The 'Collaboration Campaign' folder is selected, indicated by a checkmark and a red circle '3'. The top action pane shows icons for 'New', 'Rename', 'Move', 'Copy', 'Paste', 'Delete', and 'Share'. A search bar is visible on the right.

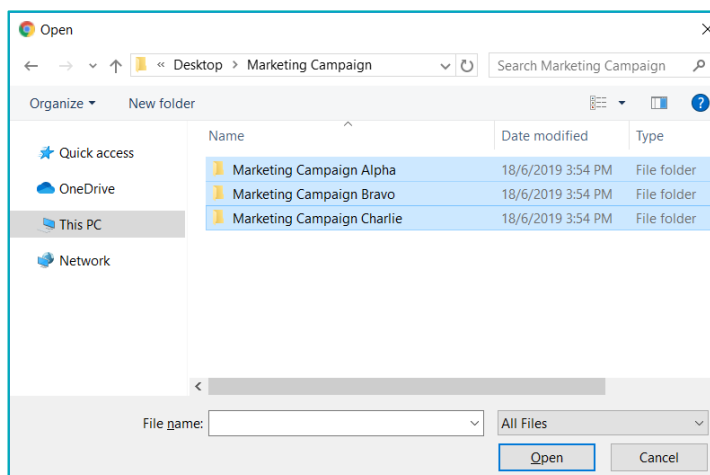
4 Upload Files

4.1 Using Upload Feature

1. Click on **Upload File** .

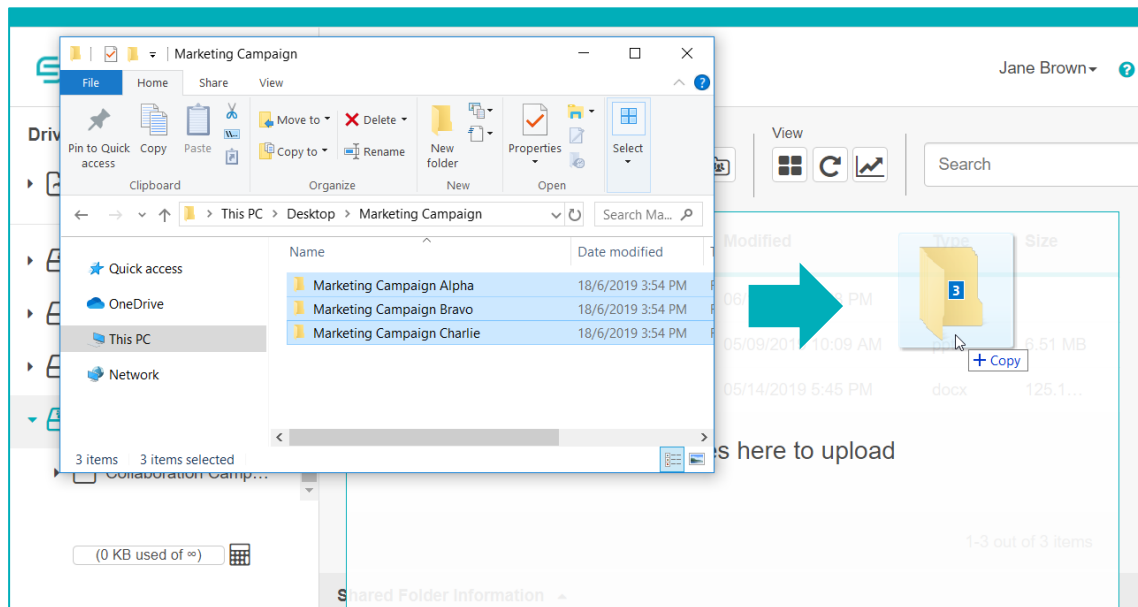


2. A file navigation window will appear. Select the file/folder(s) you wish to upload. You may select multiple file/folder(s) at a time.




4.2 Using “Drag & Drop” Method

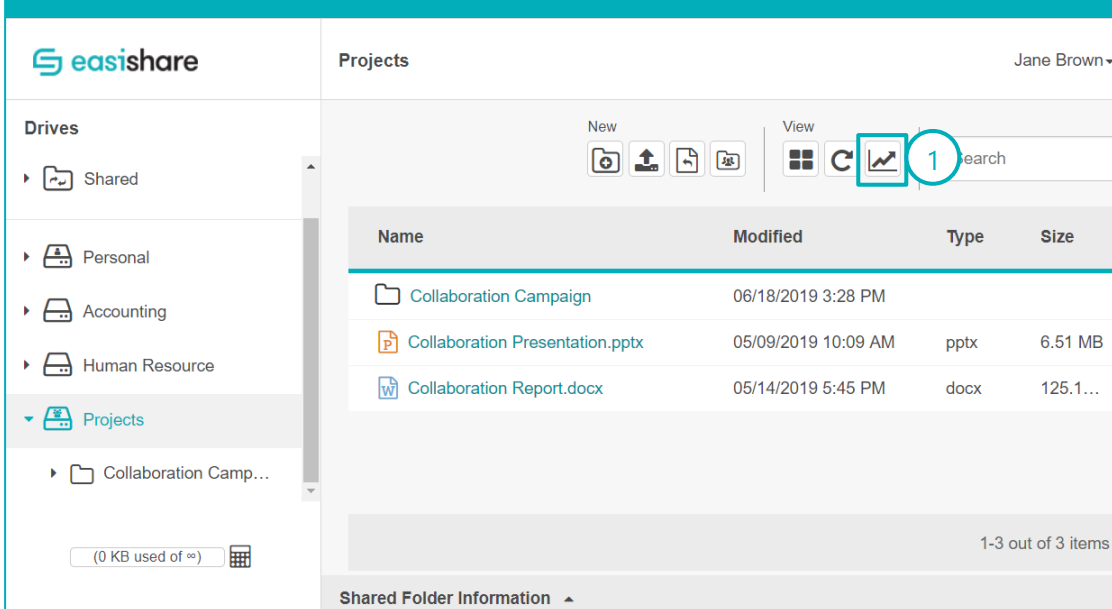
1. Drag and drop file/folder(s) from your desktop or file explorer. You may select multiple file(s) at a time.





4.3 Check Upload Status

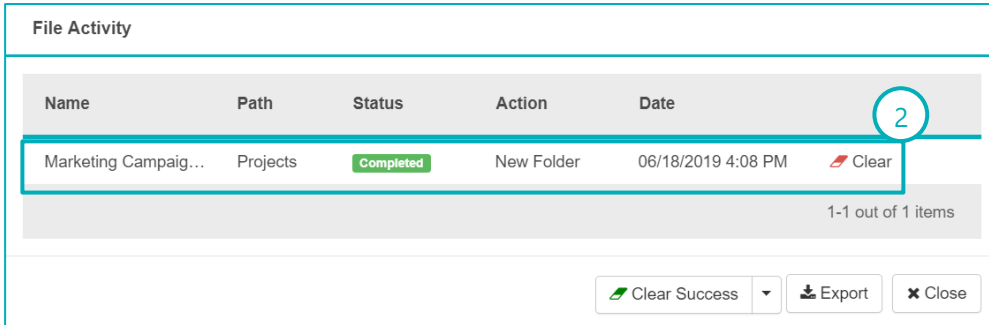
1. Click on **File Activity**  located at the top right of the application.
2. Alternative, you can click on **File Activity** in the pop-up message each time after a successful upload.



The screenshot shows the EasiShare web portal interface. On the left, there is a sidebar with 'Drives' including Shared, Personal, Accounting, Human Resource, and Projects (selected). The main area is titled 'Projects' and shows a table of files. A red circle with the number '1' highlights the 'File Activity' icon in the top right corner of the main area.

Name	Modified	Type	Size
Collaboration Campaign	06/18/2019 3:28 PM		
Collaboration Presentation.pptx	05/09/2019 10:09 AM	pptx	6.51 MB
Collaboration Report.docx	05/14/2019 5:45 PM	docx	125.1...

1-3 out of 3 items



The screenshot shows the 'File Activity' pop-up window. It contains a table with columns: Name, Path, Status, Action, and Date. A red circle with the number '2' highlights the 'Clear' button in the 'Action' column for the first row.

Name	Path	Status	Action	Date
Marketing Campaig...	Projects	Completed	New Folder	06/18/2019 4:08 PM

1-1 out of 1 items

Clear Success Export Close

Note: You may encounter these pop-up messages.

File Upload Successfully

Your file is currently being uploaded. Check File Activity.

File with same name already exists

Attention

File with same name already exists, overwrite?

- Collaboration Report.docx

✕ Cancel
✓ Overwrite

4.4 Uploading a Virus File

When the User accidentally uploaded a virus file through drag-and-drop or uploading it directly, the following steps below will occur.

1. The message "Your file is currently being uploaded. Check the File Activity."
2. In the File Activity, the diagram below will be shown.

File Activity					
Name	Path	Status	Action	Date	
virus.txt	Personal	Failed	Upload	06/18/2019 4:26 PM	Clear
<div>Virus Detected</div> <div>1-1 out of 1 items</div>					
<div> ✓ Clear Success 📄 Export ✕ Close </div>					

3. An error message will also be displayed at the top right-hand corner:


Virus Detected

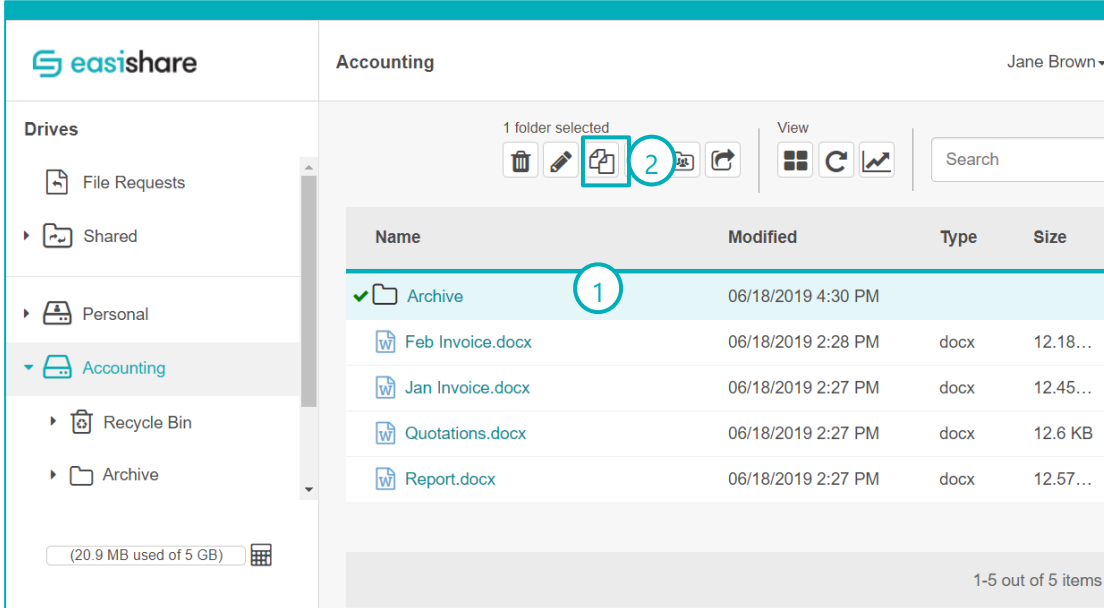
Note:

This scenario only applies if customer has implemented Virus scanning in EasiShare. If not turn on, then ignore this scenario.

5 File Operations

5.1 Copy/Move

1. Select the file/folder(s). To select, click on the white area beside the file/folder(s) name. You may select multiple file/folder(s) at a time.
2. Click on **Move/Copy**  along the **Action Pane** located at the top.



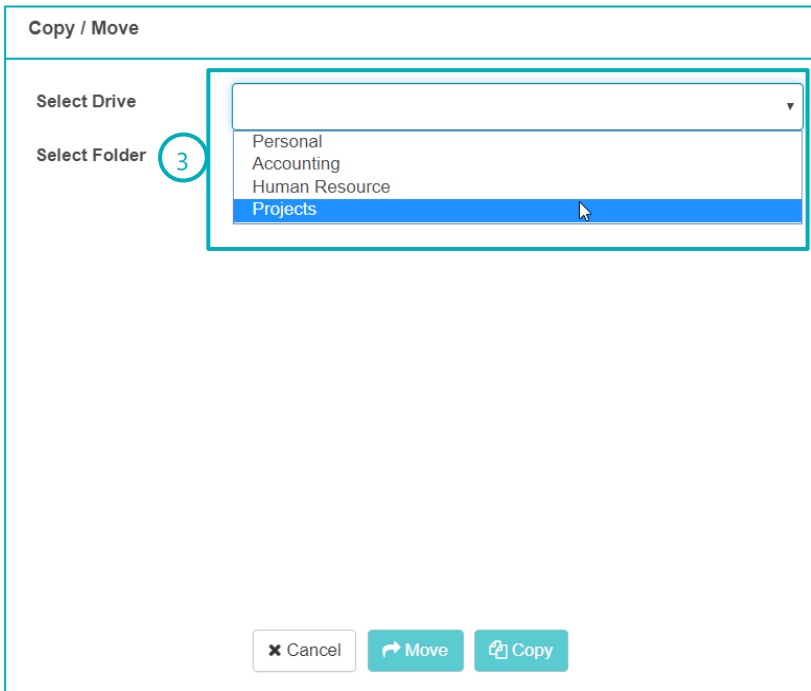
The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar lists 'File Requests', 'Shared', 'Personal', 'Accounting' (selected), 'Recycle Bin', and 'Archive'. The main area shows the 'Accounting' drive with a table of files. The 'Archive' folder is selected, indicated by a green checkmark and a circled '1'. The table lists files: 'Feb Invoice.docx', 'Jan Invoice.docx', 'Quotations.docx', and 'Report.docx'. The 'Action Pane' at the top right contains icons for 'Delete', 'Rename', 'Move/Copy' (circled '2'), 'Share', and 'View'. A search bar is also present.

Name	Modified	Type	Size
✓ Archive	06/18/2019 4:30 PM		
Feb Invoice.docx	06/18/2019 2:28 PM	docx	12.18...
Jan Invoice.docx	06/18/2019 2:27 PM	docx	12.45...
Quotations.docx	06/18/2019 2:27 PM	docx	12.6 KB
Report.docx	06/18/2019 2:27 PM	docx	12.57...

(20.9 MB used of 5 GB)

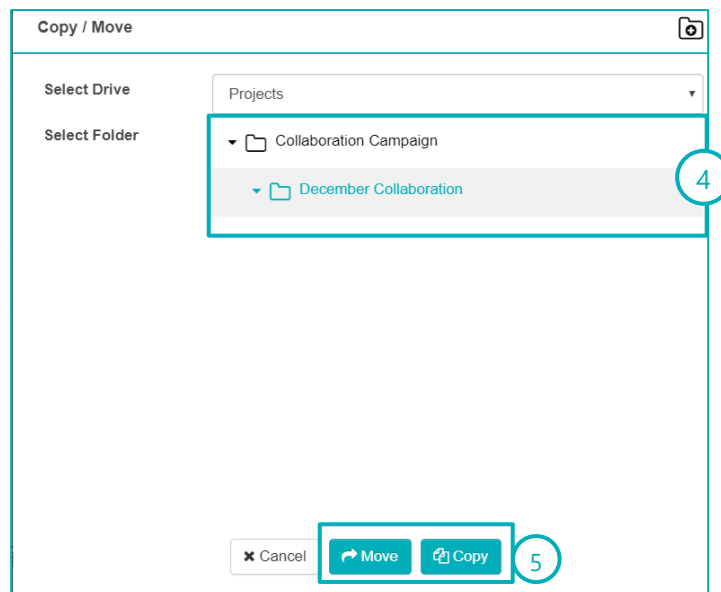
1-5 out of 5 items

3. Select a drive in the **Select Drive** drop down list.



The screenshot shows the 'Copy / Move' dialog box. It has two sections: 'Select Drive' and 'Select Folder'. The 'Select Drive' dropdown is open, showing a list of drives: 'Personal', 'Accounting', 'Human Resource', and 'Projects'. The 'Projects' drive is selected, indicated by a blue highlight and a circled '3'. At the bottom, there are buttons for 'Cancel', 'Move', and 'Copy'.


4. Select the folder you wish to move/copy in the **Select Folder List**.
5. Click on **Move/Copy** button located at the bottom.

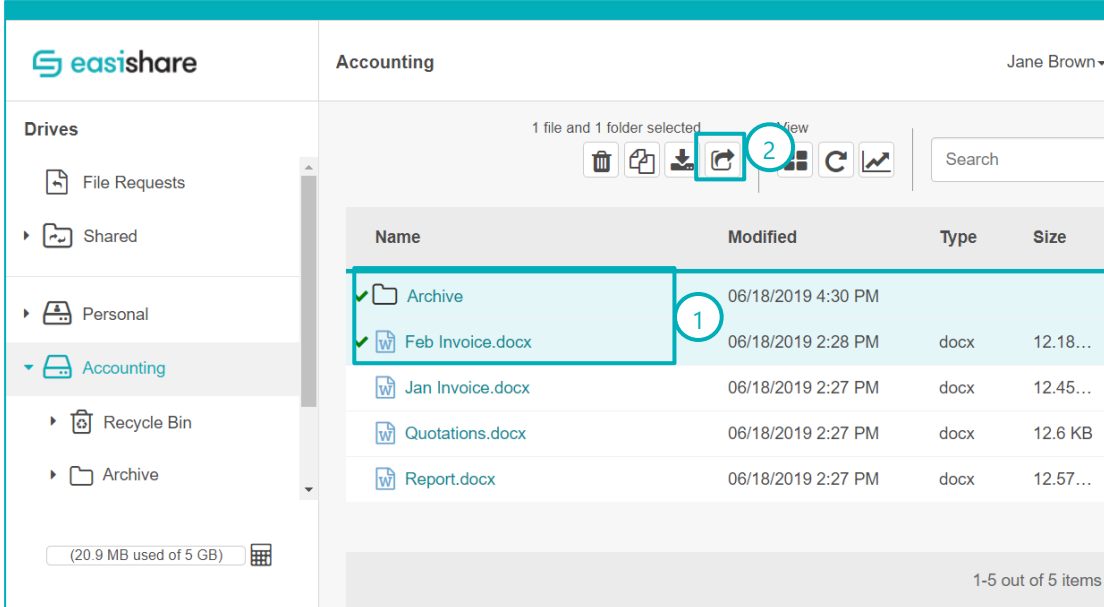


Note: Moving a file/folder that is shared may cause the link to break. Recipients may not be able to access such files/folders.



5.2 Download

1. Select the file/folder(s). To select, click on the white area beside the file/folder(s) name. You may select multiple file/folder(s) at a time.
2. Click on **Download**  along the **Action Pane** located at the top. Alternatively, you can click on the file/folder(s) name.




The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar lists 'File Requests', 'Shared', 'Personal', and 'Accounting' (which is selected). Below 'Accounting' are 'Recycle Bin' and 'Archive'. A storage usage bar at the bottom of the sidebar indicates '(20.9 MB used of 5 GB)'. The main area is titled 'Accounting' and shows a list of files and folders. The 'Archive' folder and 'Feb Invoice.docx' file are selected, indicated by checkmarks and a blue highlight. A red box labeled '1' is around the selection area. Above the file list, a toolbar contains icons for delete, copy, download, share, and view. The 'Download' icon (a downward arrow) is highlighted with a red box labeled '2'. The file list table is as follows:

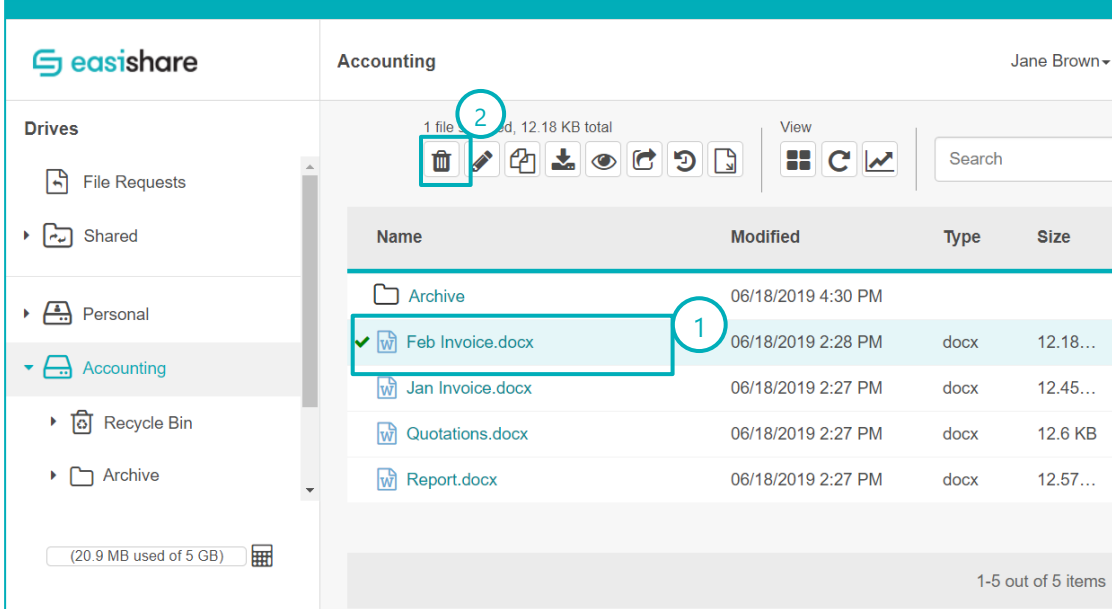
Name	Modified	Type	Size
✓ Archive	06/18/2019 4:30 PM		
✓ Feb Invoice.docx	06/18/2019 2:28 PM	docx	12.18...
Jan Invoice.docx	06/18/2019 2:27 PM	docx	12.45...
Quotations.docx	06/18/2019 2:27 PM	docx	12.6 KB
Report.docx	06/18/2019 2:27 PM	docx	12.57...

At the bottom right of the main area, it says '1-5 out of 5 items'.



5.3 Delete


1. Select the file/folder(s). To select, click on the white area beside the file/folder(s) name. You may select multiple file/folder(s) at a time.
2. Click on **Delete**  along the **Action Pane** located at the top.




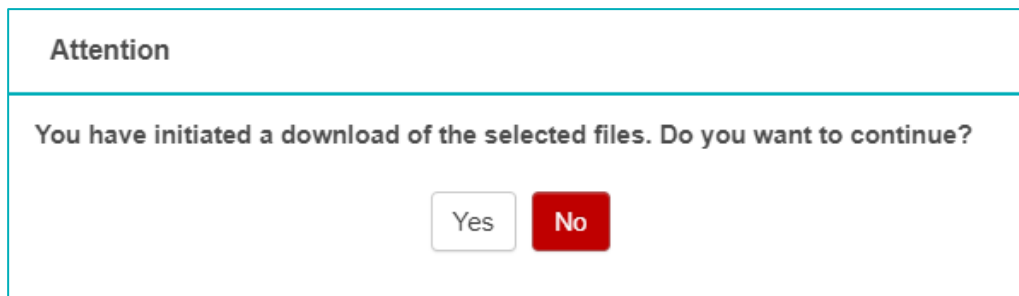
The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar lists 'File Requests', 'Shared', 'Personal', 'Accounting' (selected), 'Recycle Bin', and 'Archive'. The main area displays the 'Accounting' drive contents. A table lists files: 'Archive' (folder), 'Feb Invoice.docx' (selected with a green checkmark), 'Jan Invoice.docx', 'Quotations.docx', and 'Report.docx'. The 'Feb Invoice.docx' row is highlighted. Above the table, a toolbar contains icons for delete, edit, copy, download, view, share, and refresh. The delete icon (trash) is circled with a '2'. The selected file 'Feb Invoice.docx' is circled with a '1'. The status bar at the bottom right indicates '1-5 out of 5 items'.

Name	Modified	Type	Size
Archive	06/18/2019 4:30 PM		
✓ Feb Invoice.docx	06/18/2019 2:28 PM	docx	12.18...
Jan Invoice.docx	06/18/2019 2:27 PM	docx	12.45...
Quotations.docx	06/18/2019 2:27 PM	docx	12.6 KB
Report.docx	06/18/2019 2:27 PM	docx	12.57...

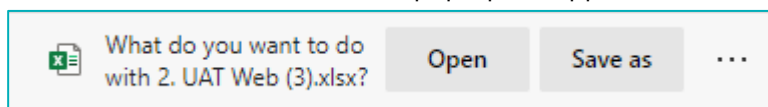
5.4 Recycle Bin



The following features are available when you click the Recycle Bin Icon  of a drive and select file(s)/folder(s).

- Download
 1. The user can proceed to download the deleted file(s)/folder(s) in his Recycle Bin in Local Drive/PC by clicking  icon.
 2. A pop up will appear as follows, Click on 'Yes'.



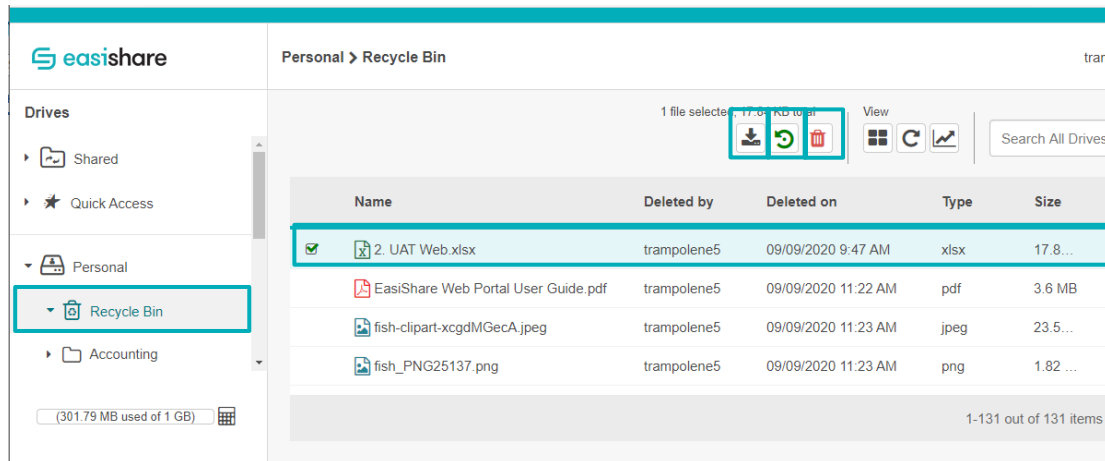
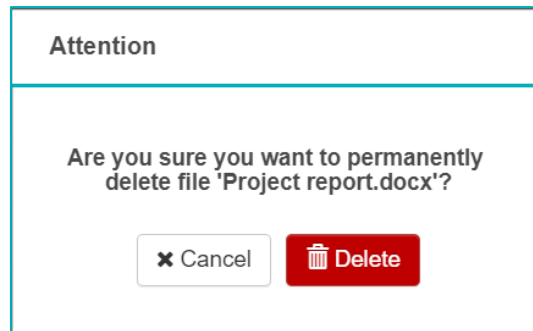
3. The file will be downloaded, and a pop-up will appear below the browser.




- Restore
 1. Users can restore deleted items from his Recycle Bin to the original storage drive of the document by clicking **Restore**  icon.
 2. The file(s)/folder(s) will be restored in the original drive.
- Delete
 1. Users can delete the items permanently from his Recycle Bin to the original storage drive of the document by clicking  icon
 2. The pop-up below would be displayed for the user to confirm the deletion process.
 3. If Click "Cancel", the action will be cancelled, and file will stay in the Recycle Bin.
 4. If Click "Delete", the file will be removed permanently from the server.

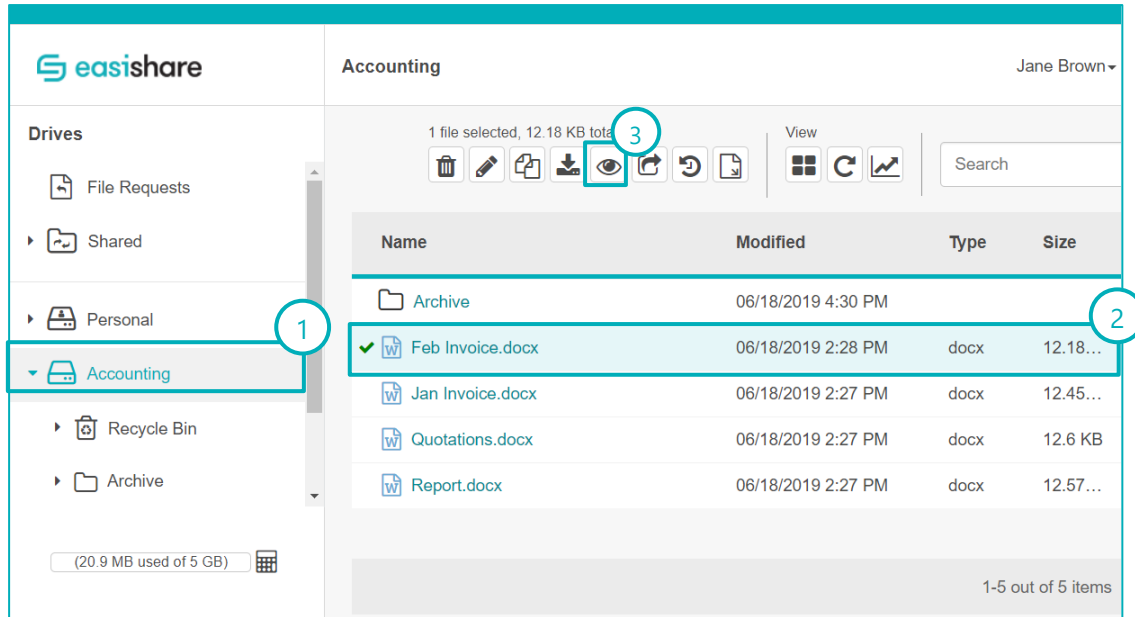
(Note:

A copy will be reserved in the Admin's Recycle Bin if customer has Admin Recycle Bin feature turned on.)



5.5 Preview

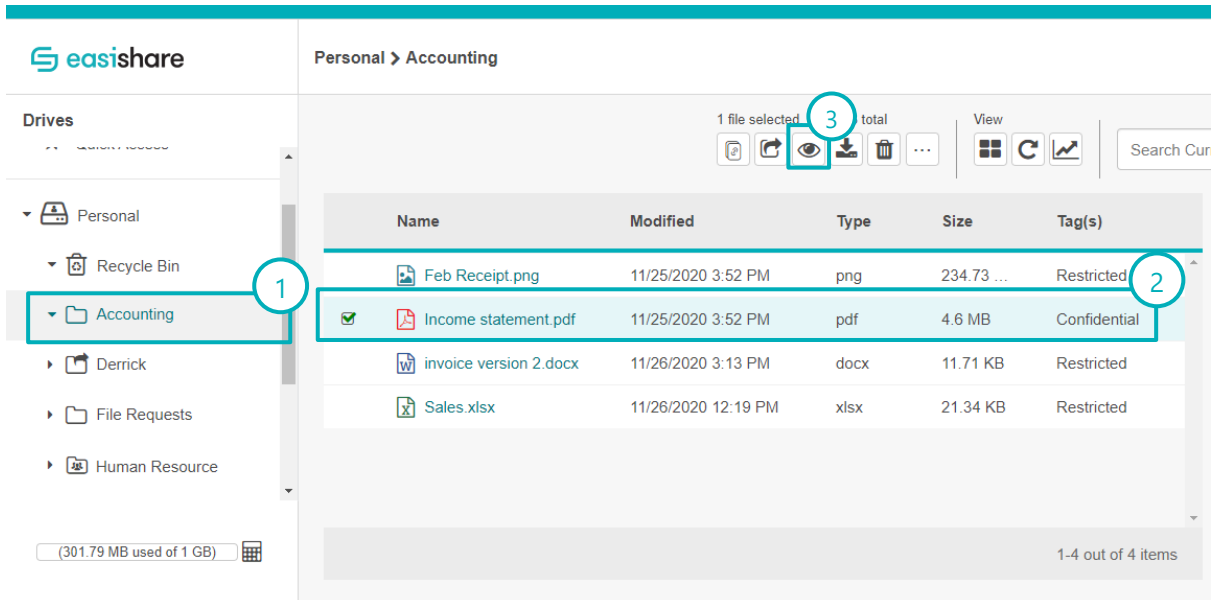
1. Navigate to the folder where the file resides.
2. Select the file. To select, click on the white area beside the file name.
3. Select the **Preview**  along the Action Pane located at the top.



The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar has 'Accounting' selected (1). The main area displays the 'Accounting' drive contents. A file named 'Feb Invoice.docx' is selected (2). Above the file list, a toolbar contains icons for file actions, with the 'Preview' icon (an eye) highlighted (3). The file list table is as follows:

Name	Modified	Type	Size
Archive	06/18/2019 4:30 PM		
✓ Feb Invoice.docx	06/18/2019 2:28 PM	docx	12.18...
Jan Invoice.docx	06/18/2019 2:27 PM	docx	12.45...
Quotations.docx	06/18/2019 2:27 PM	docx	12.6 KB
Report.docx	06/18/2019 2:27 PM	docx	12.57...

At the bottom right, it indicates '1-5 out of 5 items'.

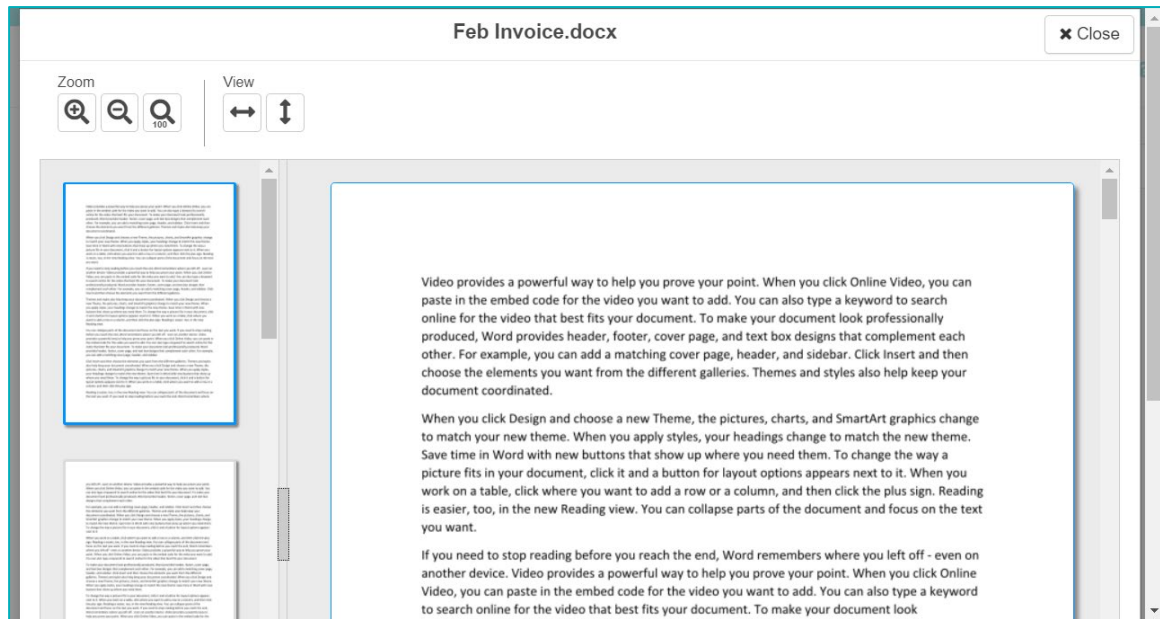


The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar has 'Accounting' selected (1). The main area displays the 'Personal > Accounting' drive contents. A file named 'Income statement.pdf' is selected (2). Above the file list, a toolbar contains icons for file actions, with the 'Preview' icon (an eye) highlighted (3). The file list table is as follows:

Name	Modified	Type	Size	Tag(s)
Feb Receipt.png	11/25/2020 3:52 PM	png	234.73 ...	Restricted
✓ Income statement.pdf	11/25/2020 3:52 PM	pdf	4.6 MB	Confidential
invoice version 2.docx	11/26/2020 3:13 PM	docx	11.71 KB	Restricted
Sales.xlsx	11/26/2020 12:19 PM	xlsx	21.34 KB	Restricted

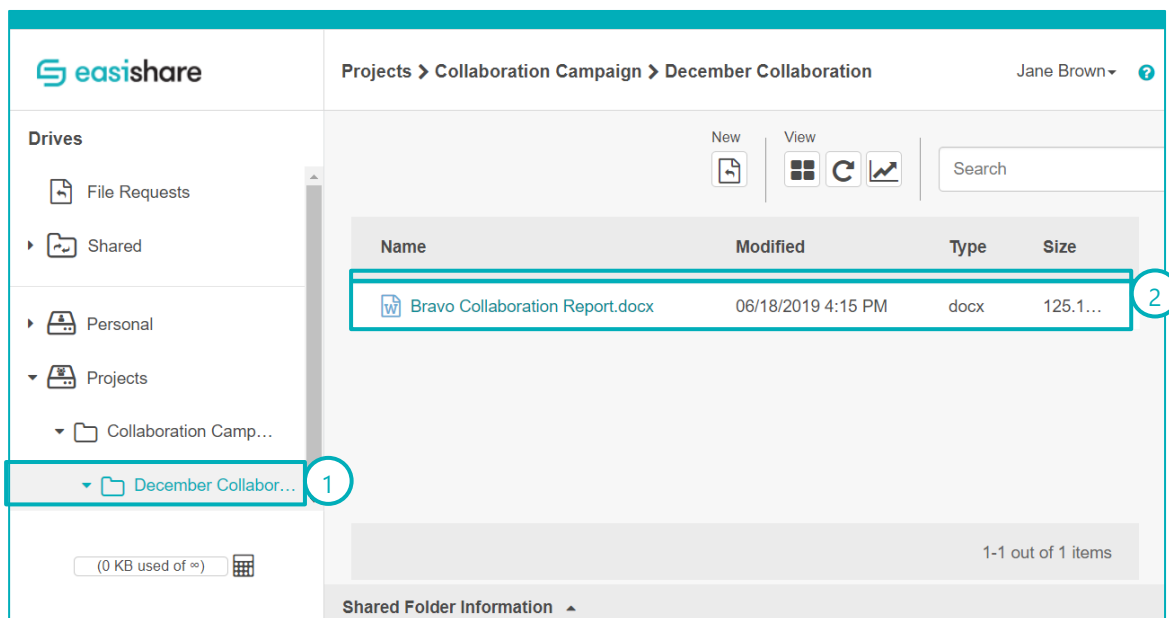
At the bottom right, it indicates '1-4 out of 4 items'.

A pop-up box will appear with the preview of the file.

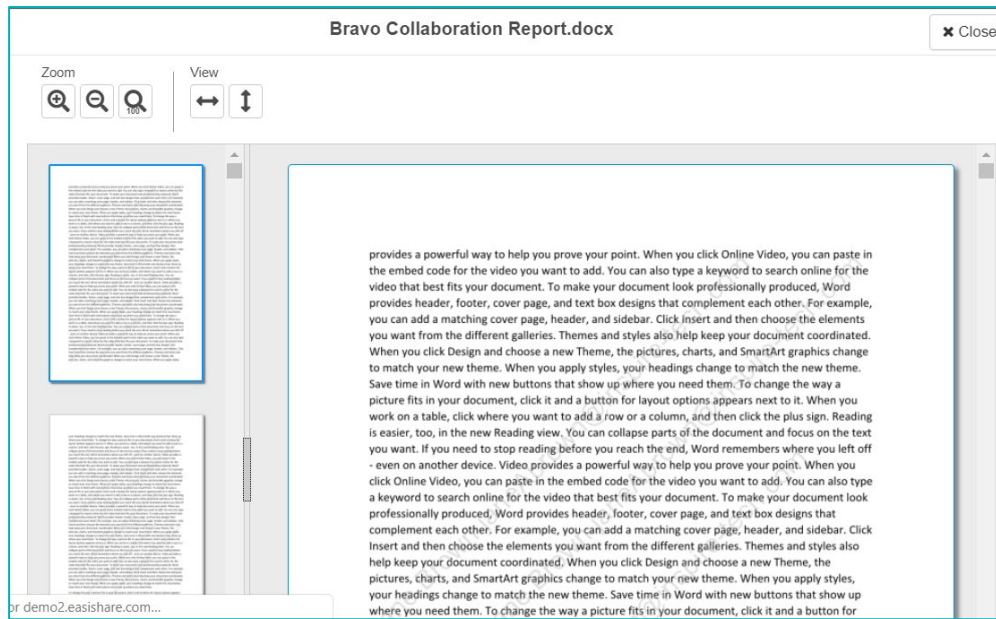


5.6 Preview a file with Viewer Permissions

1. Navigate to the folder where the file resides.
2. Select the file. To select, click on the file name.



A pop-up box will appear with the preview of the file.

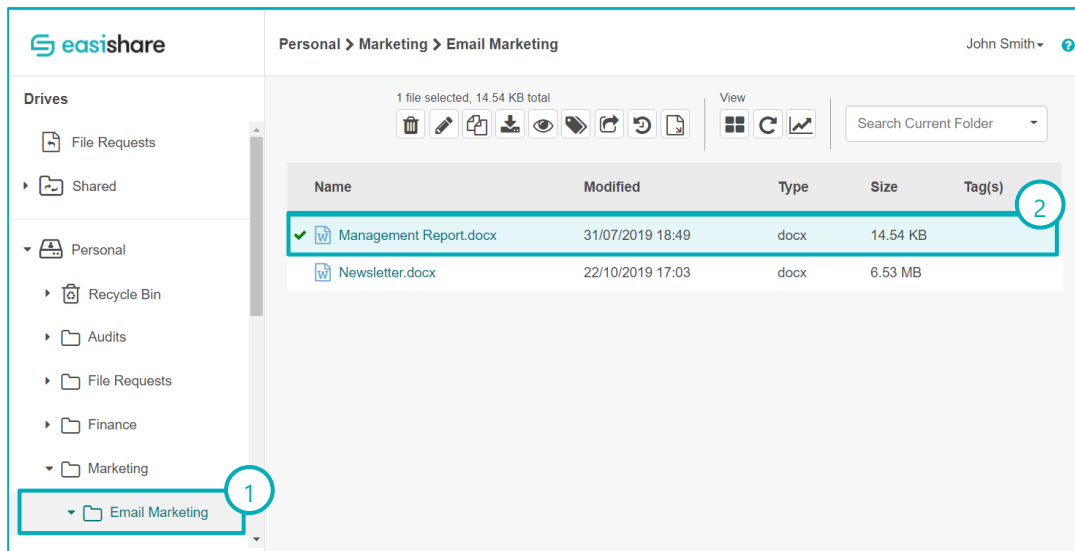



Note: Users with Viewer permissions previewing a file will have a watermark displaying the user's name and email address.

5.7 Document Tag

Note: The **Document Tag** function allows users to select and tag files. These tags may have sharing restrictions enforced by your administrator.

1. Navigate to the folder where the file resides.
2. Select the file. To select, click on the white area beside the file name.



3. Select the **Document Tag**  along the Action Pane located at the top.
4. Select the tags for this file.

5. Click on Apply to All and the file will be tagged with the chosen tags.

Document Tag

Filename



Management Report.docx

Priority: High

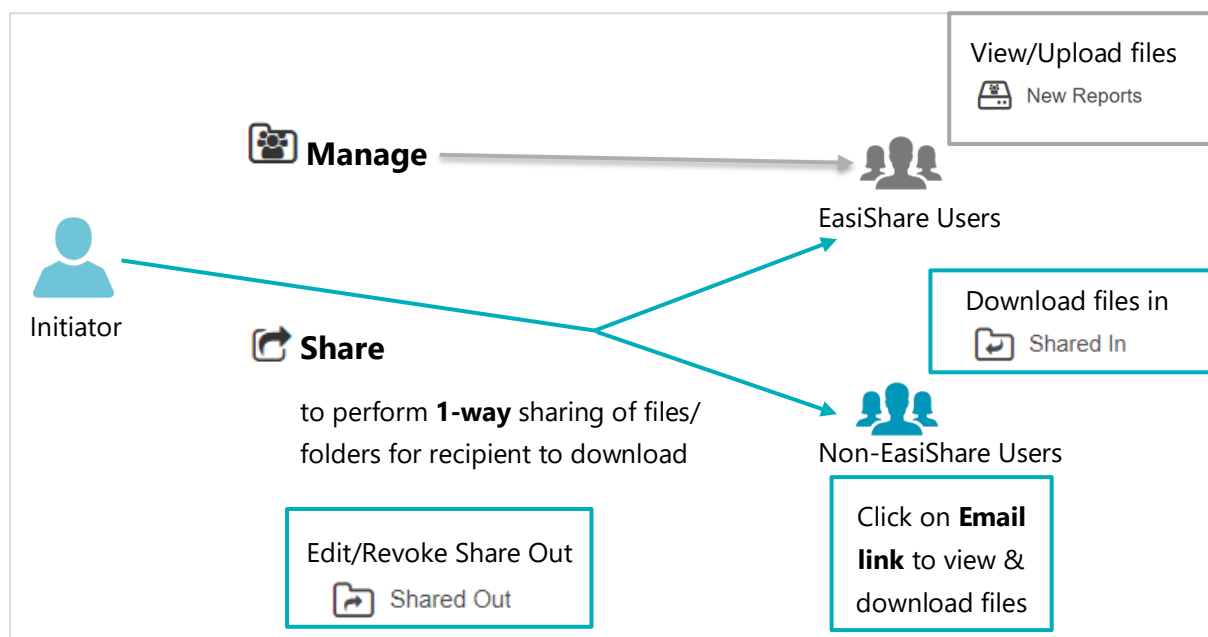
Year: 2019

Personal > Marketing > Email Marketing John Smith


New View Search Current Folder

Name	Modified	Type	Size	Tag(s)
 Management Report.docx	31/07/2019 18:49	docx	14.54 KB	High,2019
 Newsletter.docx	22/10/2019 17:03	docx	6.53 MB	

6 Share




Scenarios & How to use the functions

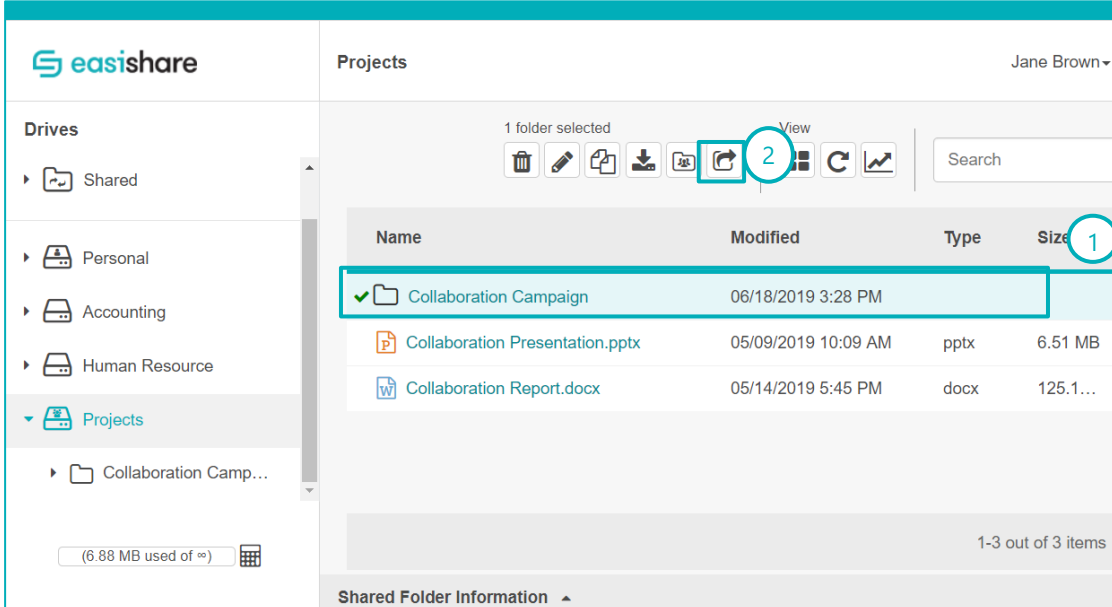
Scenarios	What do you (the initiator) do?	What do the recipient do?
I want to send documents to my vendor to download.	Select document & click on "Share"	Click on the link & download the file(s).
I want to send a set of files to my vendor to download.	Either 1) Put them in a folder, select the folder & click on "Share" 2) Multi-select the files & click "Share"	Click on the link from the email & download the files in a zipped folder.
I want to collaborate with my colleagues to allow them to contribute files for a project. Both my colleagues and I can upload and delete files in the same folder.	Select a folder & click on "Manage" Set the permission as author for the colleagues.	Login as user & click on Shared Drives with a different icon. e.g.  New Reports

6.1 Share

Note: Share function allows users to share file/folder to allow recipients to view or download and receive a copy of the file/folder(s). Any changes made to the file/folder(s) by the recipients will not affect the sender's original copy.

If you wish to collaborate with internal users, please use the **Manage** function. For a detailed guide, do refer to of this user guide.

1. Select the file/folder(s) you wish to share. You may select multiple file/folder(s).
2. Click on **Share**  along the **Action Pane** located at the top.




The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar lists 'Shared', 'Personal', 'Accounting', 'Human Resource', and 'Projects'. The 'Projects' drive is selected, showing a folder named 'Collaboration Camp...'. The main area displays the 'Projects' section for user 'Jane Brown'. A table lists the contents of the 'Collaboration Campaign' folder:

Name	Modified	Type	Size
✓ Collaboration Campaign	06/18/2019 3:28 PM		
Collaboration Presentation.pptx	05/09/2019 10:09 AM	pptx	6.51 MB
Collaboration Report.docx	05/14/2019 5:45 PM	docx	125.1...

The 'Collaboration Campaign' folder is selected, indicated by a green checkmark and a red box. The 'Share' icon in the action pane is highlighted with a red circle and the number 2. The 'Collaboration Campaign' folder is highlighted with a red box and the number 1. The bottom status bar shows '(6.88 MB used of ∞)' and '1-3 out of 3 items'.



3. Enter the recipient's name, email and/or contact number. Contact number is only mandatory if you wish to enable One Time Password (OTP). Otherwise, you may leave it blank.
4. Click on  to confirm recipient. Alternatively, you can press **enter**.
Tips: After adding the recipient, the **name** and **mobile number** can still be edited by clicking on the respective fields.
5. To import multiple recipients, click on **Manage Recipient** on the top right corner, click on **Import Recipient List** to browse for a CSV file to import a list of recipients with the headers **Name, Email** and **Mobile**.
6. You can also export an empty template by clicking on **Manage Recipient** on the top right corner, click on **Export Recipient List** for exporting a list of recipients' details that are added individually.
7. If you wish to create a group, add 2 or more recipients, click on **Manage Recipient** on the top right corner, then click on **Create Group**.
8. Enter your message.
9. Enable/Disable settings you wish to apply. To find out in details how each feature works, refer to the respective sections below.
10. Click on the checkbox to **agree to our Terms and Conditions**.
11. Click **Share**.

The screenshot shows the 'Share' form in the EasiShare web portal. The form is titled 'Share' and contains the following elements:

- 3**: A text input field for the recipient's name, email, and/or contact number.
- 4**: A 'Manage Recipients' dropdown menu with options: 'Import Recipient List', 'Export Recipient List', and 'Create Group'.
- 5**: 'Import Recipient List' button.
- 6**: 'Export Recipient List' button.
- 7**: 'Create Group' button.
- 8**: A text input field for the message.
- 9**: A settings section with the following options:
 - Link Expires: ☐
 - OTP: ☐
 - Notifications: ☐ Per Download ☐ Summary
 - No. of Attempts: attempts
- 10**: A checkbox for 'Share with View Only'.
- 11**: A 'Share' button.

At the bottom of the form, there is a warning message: 'WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By clicking the checkbox, you agree to our Terms and Conditions.' Below this message are 'Cancel' and 'Share' buttons.



6.1.1 Share with User Group

1. Refer to Section [Share](#) to begin sharing.
2. Enter the group name and select the user group which you wish to share

Share

Please enter the recipient username / name to share

Name	Email	Mobile Phone No.
pr Projects Team		




Message



Share

Please enter the recipient username / name to share

Manage Recipients ▾

Name	Email	Mobile Phone No.
 Projects Team	show members	
<i>Name</i>	<i>Email</i>	<i>Mobile Phone No.</i> 

Message




6.1.2 Share with Download Permission

1. Refer to Section [Share](#) to begin sharing.
2. If **Share with View Only** feature is turned on, **disable** it.


Share

Please enter the recipient username / name to share

Manage Recipients ▾

Name	Email	Mobile Phone No.	
 John Smith	John.Smith@inspire.tech.com	80294392	
<i>Name</i>	<i>Email</i>	<i>Mobile Phone No.</i>	

Message



Link Expires

☐

OTP

☒

Notifications

☒ ☒ Per Download ☐ Summary

No. of Attempts

☐ attempts

Share with View Only ?

☐ 2

☐ WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By clicking the checkbox, you agree to our Terms and Conditions.

✕ Cancel

✉ Share

Note:

This feature may be controlled by your central administration system. If you are unable to enable or disable, it may be due to your organisation policy settings.




6.1.3 Share with 'View Only' Permission

1. Refer to Section [Share](#) to begin sharing.
2. Enable on **Share with View Only**.


Share

Please enter the recipient username / name to share

Manage Recipients ▾

Name	Email	Mobile Phone No.	
 John Smith	John.Smith@inspire.tech.com	80294392	
<i>Name</i>	<i>Email</i>	<i>Mobile Phone No.</i>	

Message



Link Expires

☐

OTP


☒

Notifications

☒ ☒ Per Download ☐ Summary

No. of Attempts

☐ 0 attempts

Share with View Only ? 

☒

2

☐ WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By clicking the checkbox, you agree to our Terms and Conditions.

✕ Cancel

✉ Share

Note:

1. This feature only applies to **Microsoft Office documents** and **PDF documents**.
2. There will be a watermark on the content viewed by your recipient.
3. This feature may also be controlled by your central administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.



6.1.4 Share with Link Expiry

1. Refer to Section [Share](#) to begin sharing.
2. Enable **Link Expires**.
3. Set the date and time by clicking on the calendar icon.

Share

Please enter the recipient username / name to share

Manage Recipients ▾

Name	Email	Mobile Phone No.
John Smith	John.Smith@inspire.tech.com	80294392
<i>Name</i>	<i>Email</i>	<i>Mobile Phone No.</i>

Message

Link Expires

01/20/2021 11:59 PM

OTP

Notifications

☒ Per Download
☐ Summary

No. of Attempts

0 attempts

Share with View Only

☐

WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By clicking the checkbox, you agree to our Terms and Conditions.

Cancel

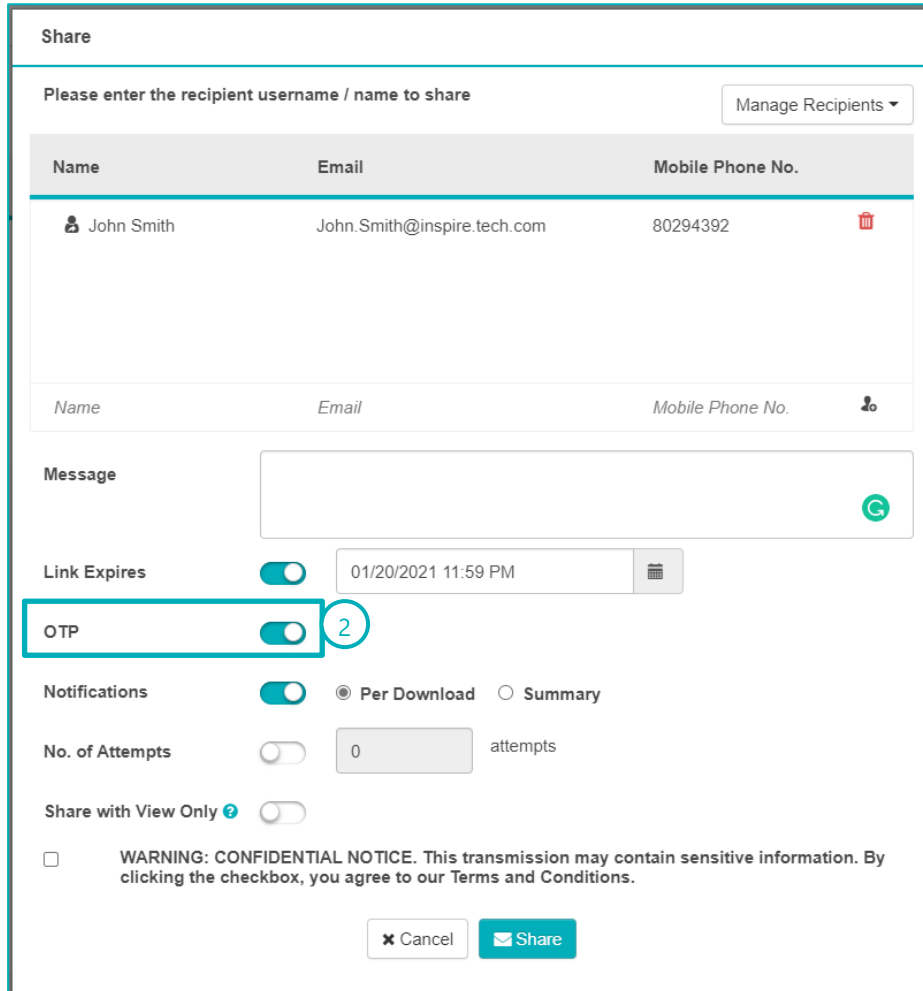
Share

Note:

1. The expiry date and time has to be set at least an hour later than the current time.
2. The maximum expiry date may also be restricted by your organisation policy.
3. This feature may also be controlled by your central administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.




6.1.5 Share with One Time Password (OTP)

1. Refer to Section [Share](#) to begin sharing.
2. Enable **OTP**.



The screenshot shows the 'Share' interface with the following elements:

- Share** header
- Input field: "Please enter the recipient username / name to share" with a "Manage Recipients" dropdown.
- Recipient list table:

Name	Email	Mobile Phone No.	
 John Smith	John.Smith@inspire.tech.com	80294392	
Name	Email	Mobile Phone No.	

- Message** input field with a green send icon.
- Link Expires** toggle (on) and date/time picker (01/20/2021 11:59 PM).
- OTP** toggle (on) with a red circle and number '2' highlighting it.
- Notifications** toggle (on) with radio buttons for "Per Download" (selected) and "Summary".
- No. of Attempts** toggle (off) and input field (0 attempts).
- Share with View Only** toggle (off).
- ☐ **WARNING: CONFIDENTIAL NOTICE.** This transmission may contain sensitive information. By clicking the checkbox, you agree to our Terms and Conditions.
- Buttons:** "Cancel" and "Share".

Note:

1. To enable OTP, the mobile number field is mandatory.
2. This feature may also be controlled by your central administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.

6.1.6 Share and Receive Notifications When Users Accessed the File/Folder(s)

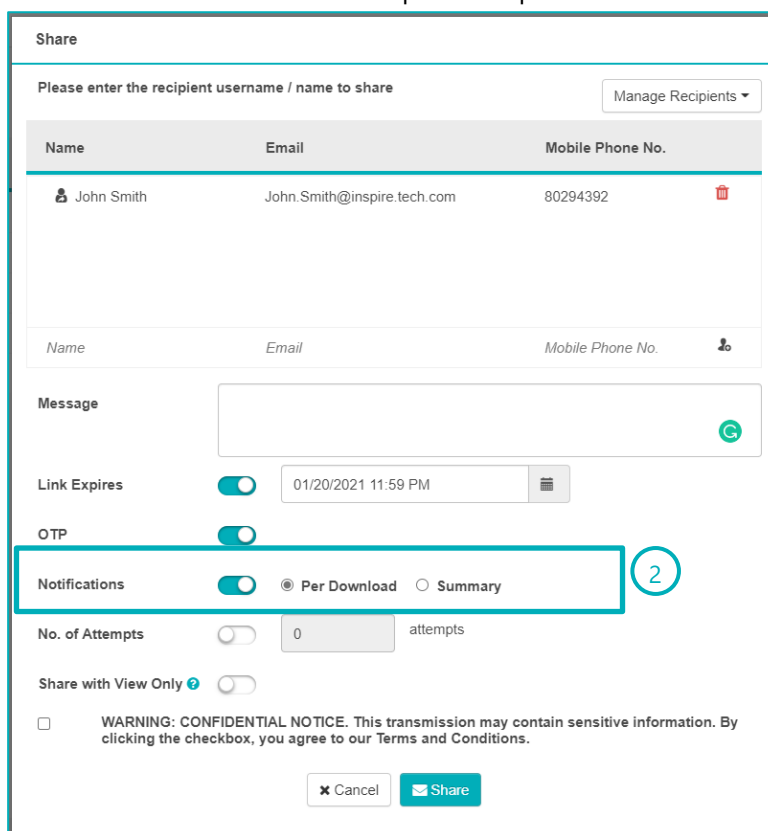
Enabling download notification allows user to know immediately when the recipient has downloaded/viewed the file. If this option is turned on and the recipient download/view the file more than once, user will also receive the same number of notifications.

However, if this option is not turned enabled, the system will still send a summary of all the different downloads by at certain time interval.

1. Refer to Section [Share](#) to begin sharing.
2. Enable **Notifications**.


Per Download: An email will be sent to your inbox whenever a file is downloaded


Summary: An email will be sent to your inbox at regular intervals to inform you of all downloads which occurred in the past time period.




Share

Please enter the recipient username / name to share Manage Recipients ▾

Name	Email	Mobile Phone No.
 John Smith	John.Smith@inspire.tech.com	80294392

Name *Email* *Mobile Phone No.* 

Message

Link Expires ☒ 01/20/2021 11:59 PM 

OTP ☒

Notifications ☒ ☒ Per Download ☐ Summary 2

No. of Attempts ☐ 0 attempts

Share with View Only ☒

☐ WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By clicking the checkbox, you agree to our Terms and Conditions.

✕ Cancel ✉ Share



6.1.7 Share with Number of Download Attempts

Enable the number of attempts allow the user to limit the number of download the recipient can download the file. This option can be set as default in the policy; however, the user will not be able to enable/disable this option nor changing the numbers of attempts as the policy is set. After the recipient downloads reaches the limit, the recipient will not be able to download the file.

1. Refer to Section [Share](#) to begin sharing.
2. Enable No. of attempts
3. Fill in the number of attempts the user can download the file

Share

Please enter the recipient username / name to share

Manage Recipients ▾

Name	Email	Mobile Phone No.
John Smith	John.Smith@inspire.tech.com	80294392
Name	Email	Mobile Phone No.

Message

Link Expires

01/20/2021 11:59 PM

OTP

Notifications

Per Download

Summary

No. of Attempts

10 attempts

Share with View Only

☐

WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By clicking the checkbox, you agree to our Terms and Conditions.

✕ Cancel

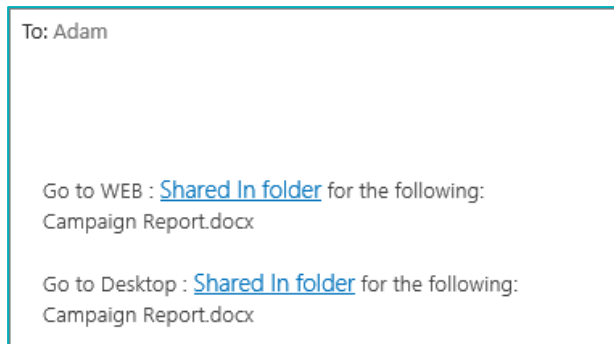
✉ Share



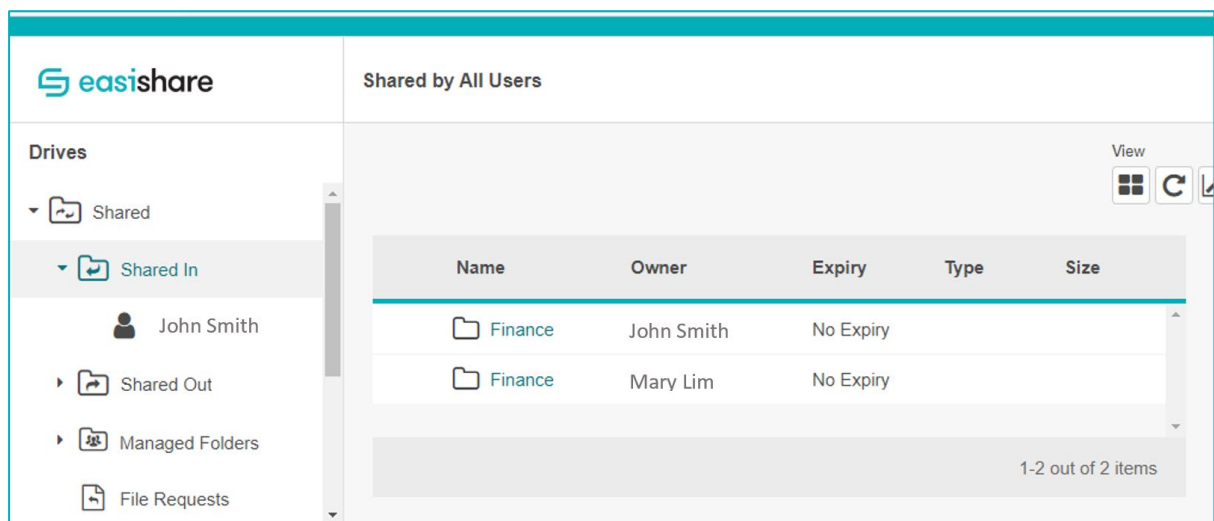
6.2 Access Shared Files/Folders

6.2.1 Email Notifications

1. User can access the file/folder(s) shared via email notification.



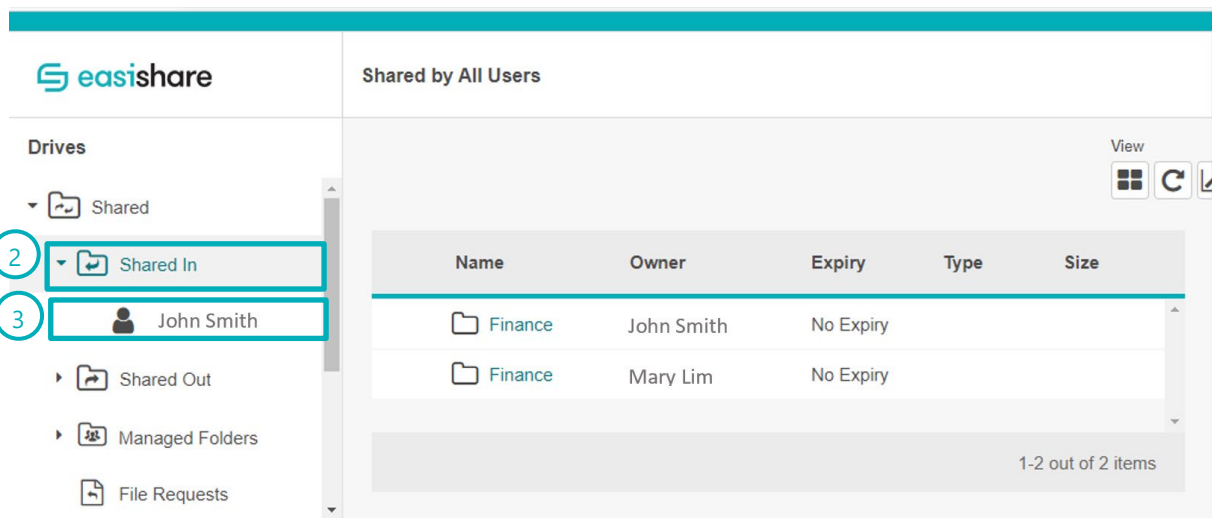
Note: For external recipients, they will only be able to view or download the specific file(s) or folder(s) that you have shared.





6.2.2 Shared In

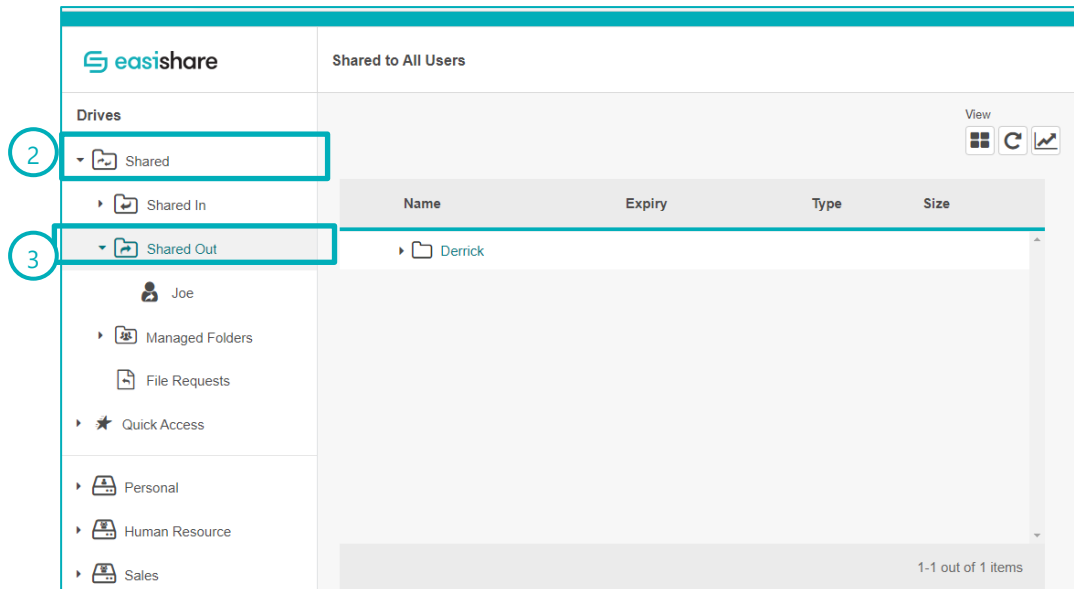
1. To access file/folder(s) shared by internal user.
2. Click on **Shared** located along the left panel.
3. Click on **Shared In**.



6.2.3 Shared Out

1. To access file/folder(s) that have been shared out 1-way by you to internal/external users.
2. Click on **Shared** located along the left panel.
3. Click on **Shared Out**.

Note: Internal users refer to users who have a registered account in EasiShare.




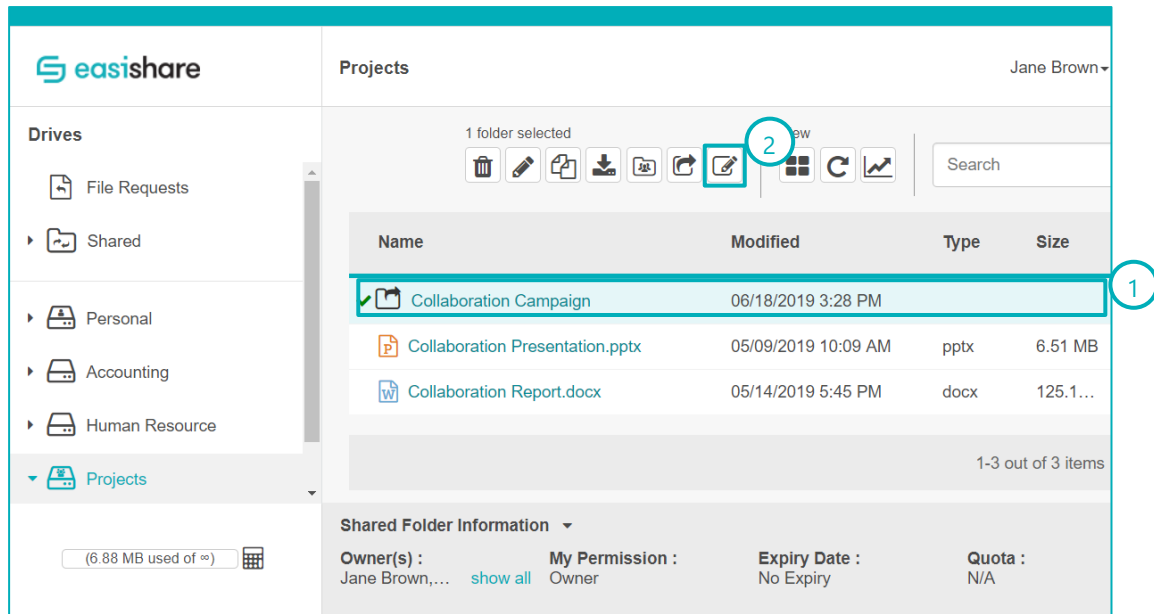
Note: External users refer to users who do not have a registered account in EasiShare.

6.3 Edit/Remove Share

There are two ways to edit share. Edits can be made at the file's original location. Alternatively, you may choose to locate the file by the user's email you have shared the file to in the '**Shared Out**' drive.

6.3.1 Edit from File's Original Location

1. Select the file/folder.
2. Click on **Edit Share** .



Projects Jane Brown

1 folder selected

Search

Name	Modified	Type	Size
✓ Collaboration Campaign	06/18/2019 3:28 PM		
Collaboration Presentation.pptx	05/09/2019 10:09 AM	pptx	6.51 MB
Collaboration Report.docx	05/14/2019 5:45 PM	docx	125.1...

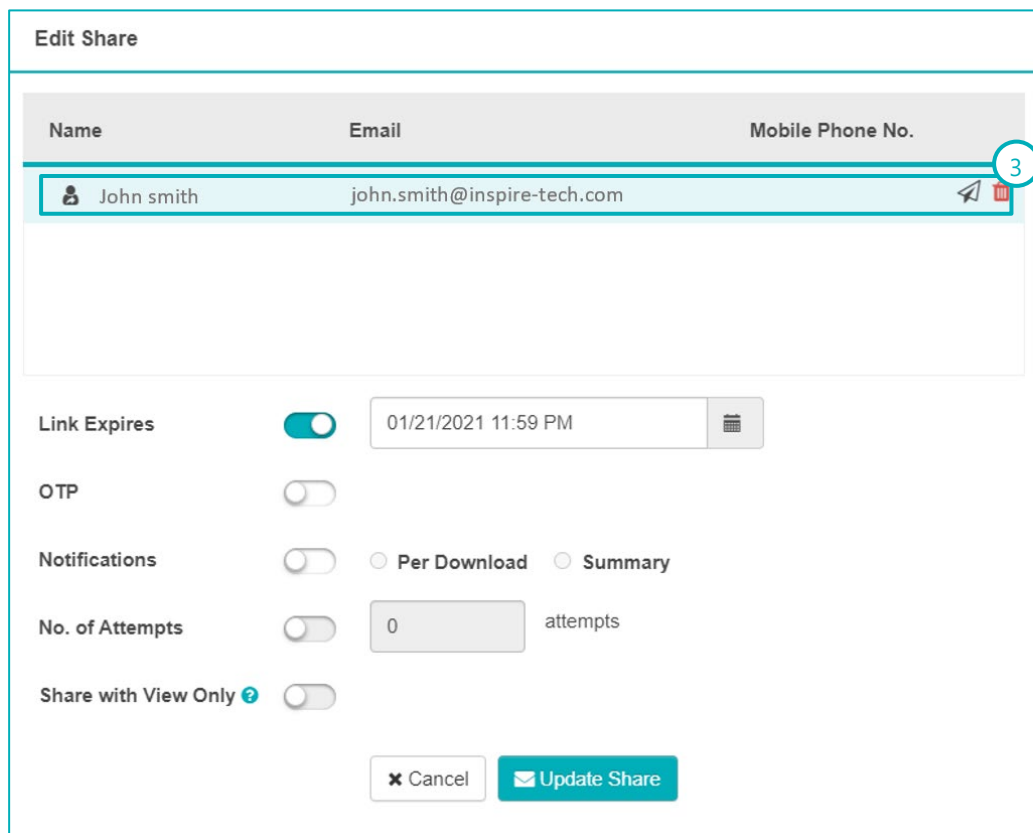
1-3 out of 3 items

Shared Folder Information

Owner(s) : Jane Brown, ... [show all](#) My Permission : Owner Expiry Date : No Expiry Quota : N/A

(6.88 MB used of ∞)

- If you wish to change the link expiry date/time or turn off the notification for specific recipients, select the recipient you wish to apply changes to by clicking on the white space beside the recipients' name.



Edit Share

Name	Email	Mobile Phone No.
John smith	john.smith@inspire-tech.com	

Link Expires ☒ 01/21/2021 11:59 PM

OTP ☐

Notifications ☐ ☐ Per Download ☐ Summary

No. of Attempts ☐ 0 attempts

Share with View Only ☐



4. Apply the changes by enabling/disabling the features or changing the date and time of the link expiry. To find out in details how each feature works, refer to the respective sections above.
5. Click **Update Share** to confirm the actions.

Edit Share

Name	Email	Mobile Phone No.
John smith	john.smith@inspire-tech.com	

Link Expires ☒ 01/21/2021 11:59 PM

OTP ☐

Notifications ☐

☐ Per Download
☐ Summary

No. of Attempts ☐

attempts

Share with View Only

☐

Cancel

Update Share

6. If you wish to **resend** the email for a user, click on and the email will be sent immediately.
7. If you wish to **remove** a user, click on and click on **Update Share** to confirm your decision.

Name	Email	Mobile Phone No.
John	john.smith@inspire-tech.com	




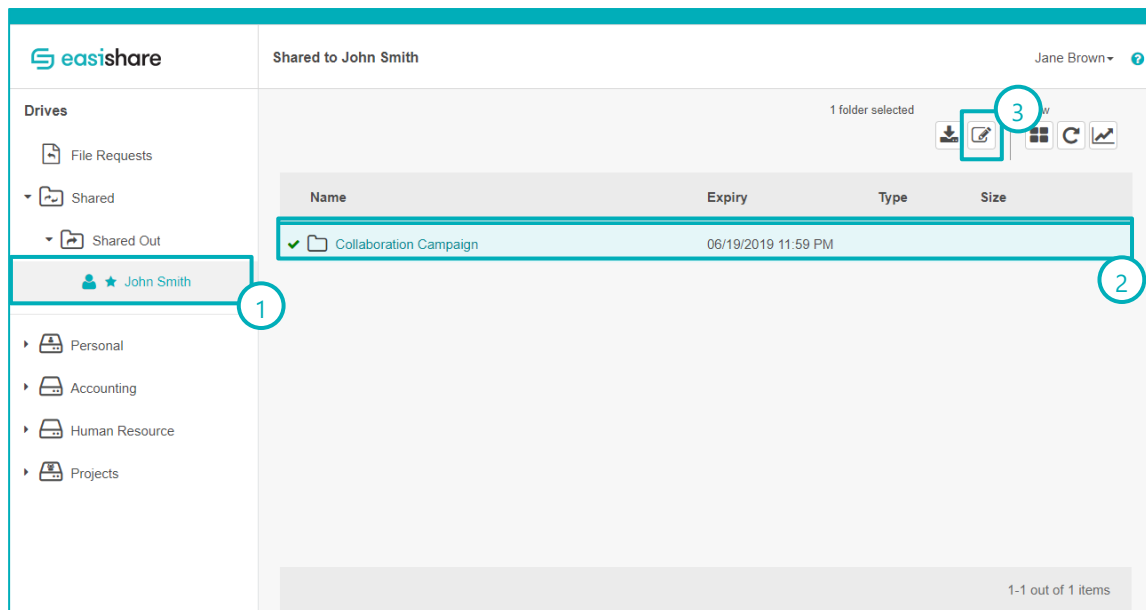
Note:

1. Modifications to the settings will only be applied to the user you have selected.
2. Some features may be controlled by your central administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.



6.3.2 Edit from Shared Out Folder

1. Click on **Shared** along the left panel. Click on **Shared Out**. Select the user's name.
2. Select the file you wish to edit.
3. Click on **Edit Share** 
4. A similar edit share pop-up window will appear. You may refer to [Edit from File's Original Location](#) to find out how to edit, resend email or remove share.

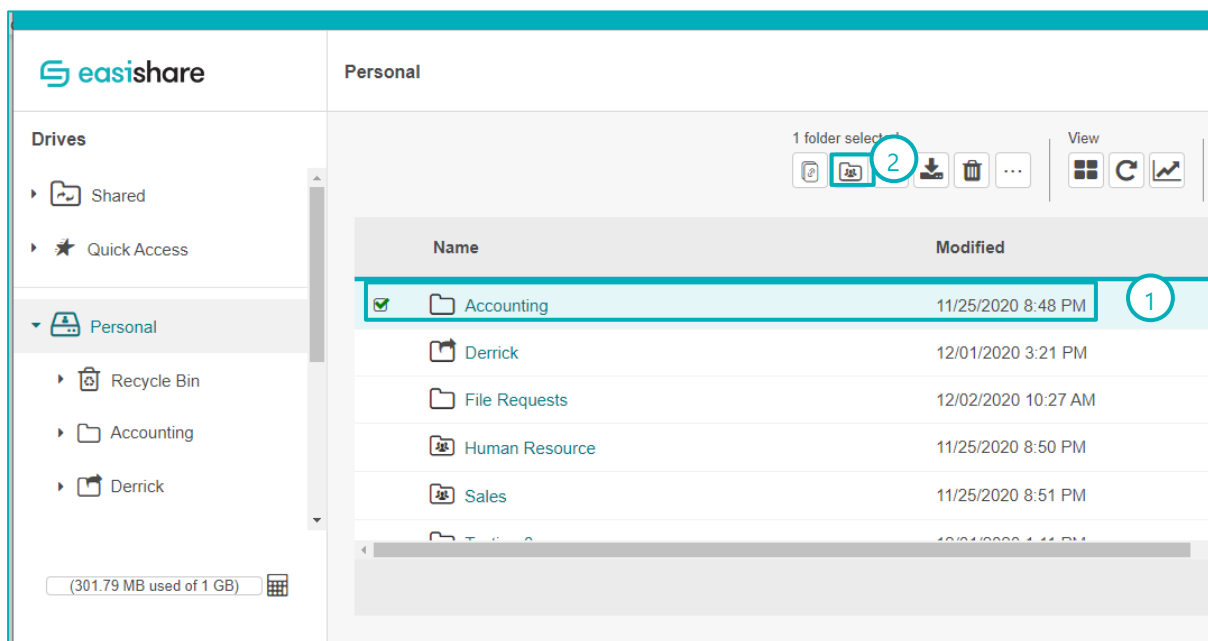




7 Manage Folder to Collaborate with Internal Users

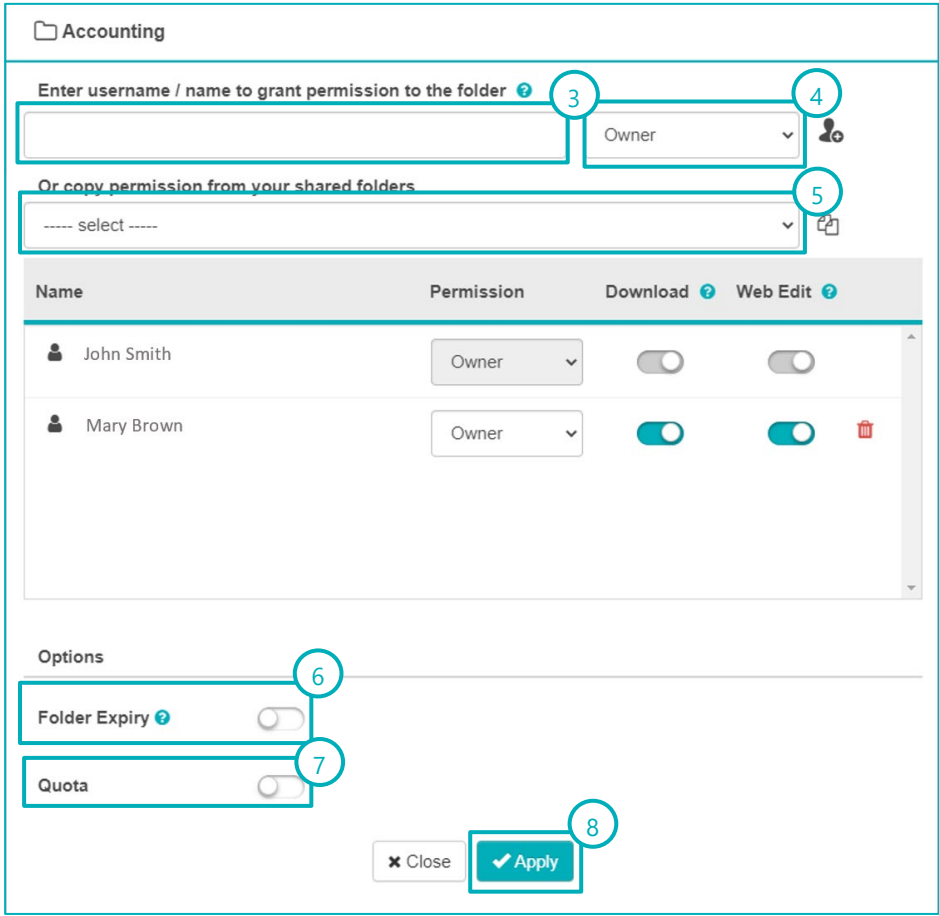
Note: Internal users refer to users who have a registered account in EasiShare.

7.1 Manage Folder for Collaboration


1. Navigate to the folder you wish to collaborate with other users. Select the folder.
2. Click on **Manage** along the **Action Pane** located at the top.




3. Enter the recipient name.
4. Assign the permission type you wish to give to the user and click on  icon.
5. If you wish to copy permissions that has already been set from another folder, select the folder name from the dropdown list and click on the copy icon .
6. Enable/disable **folder expiry** if you wish to set an expiry for the folder.
7. Enable/disable **quota** if you wish to limit the folder size.
8. Click **Apply**.
9. When the permission has been granted, the user will receive an email notification.









Accounting

Enter username / name to grant permission to the folder  3


Owner  4

Or copy permission from your shared folders 5

----- select ----- 

Name	Permission	Download 	Web Edit 
 John Smith	Owner	<input type="checkbox"/>	<input type="checkbox"/>
 Mary Brown	Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 

Options 6

Folder Expiry  7 ☐

Quota ☐

8


Note:

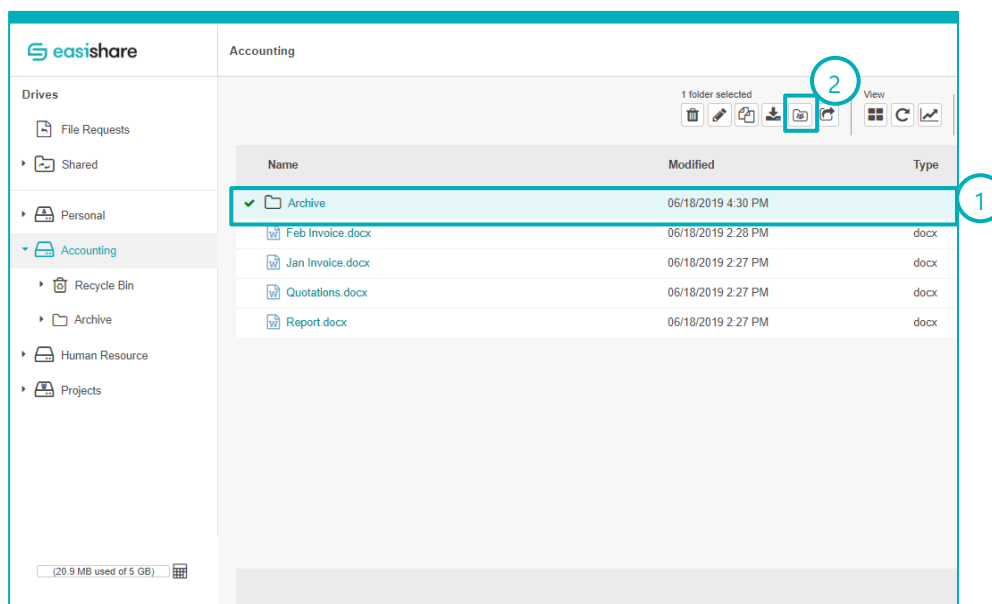
1. If the folder expiry is enabled and auto-delete is selected, after the folder expires and a pre-defined number of days set by your central administrator, the folder will be automatically purged by the system.
2. Some features may be controlled by your central administration system. If you are unable to enable or disable, it may be due to your organisation policy settings.

7.2 Collaboration Permission Types

Permission Type	Description
Reader	Permission to read files
Contributor	Permission to read, download, add and edit files
Author	Permission to read, download, add, edit and delete files
Owner	Permission to read, download, add, edit, delete and share files

7.3 Manage Folder


1. Navigate to the folder shared by internal users for collaboration. Select the folder.
2. Click on **Manage**  along the **Action Pane** located at the top.

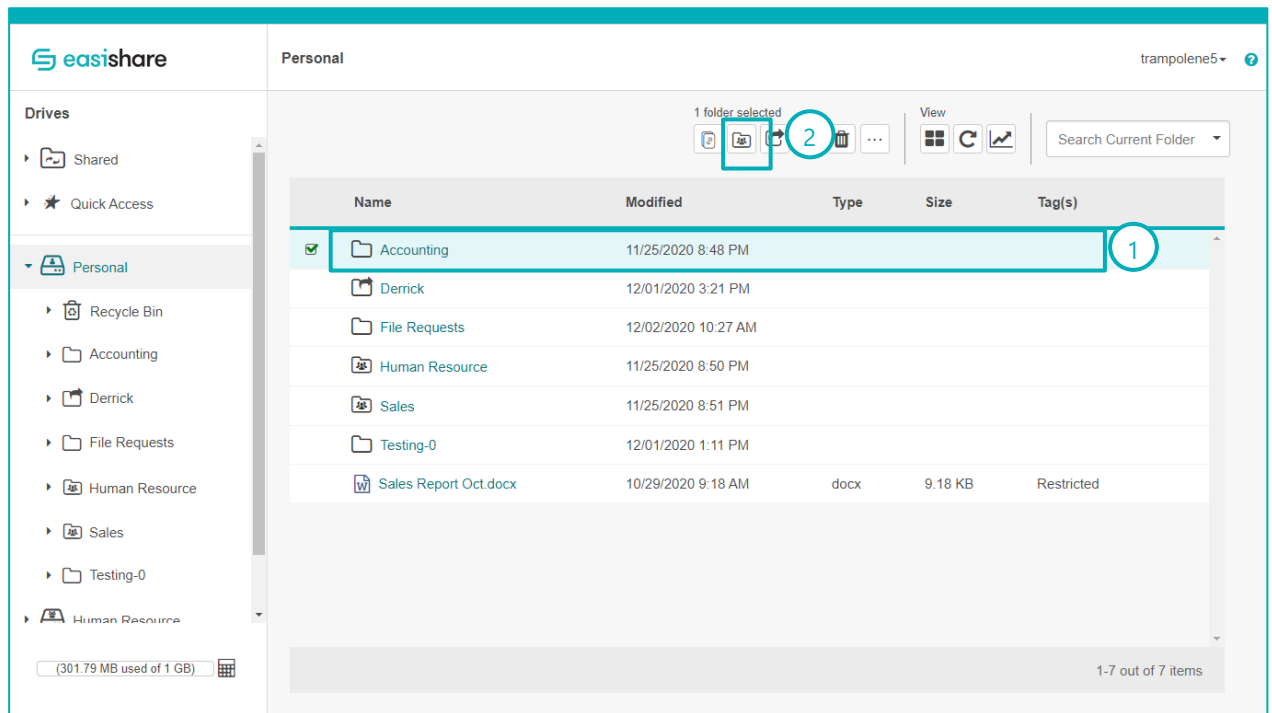



3. Add more users to collaborate with by entering the recipient's name and assigning the permission type.
4. Enable/disable folder expiry or quota as it ought.
5. For existing users, you may wish to change the permission assigned by selecting a different permission type.

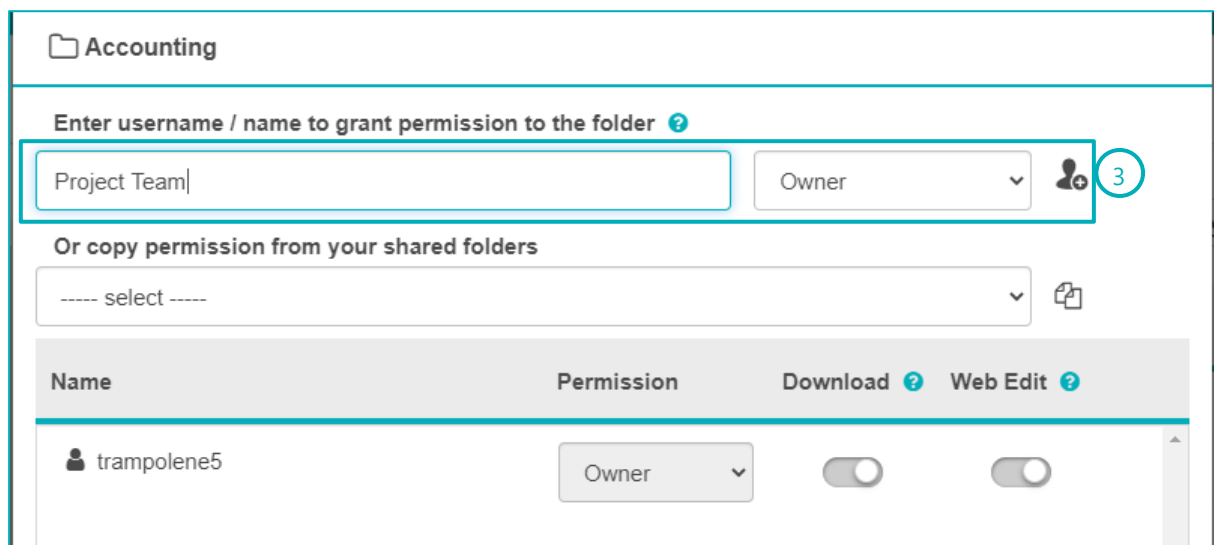


7.4 Manage Folder to User Groups

1. Navigate to the folder shared by internal users for collaboration. Select the folder.
2. Click on **Manage**  along the **Action Pane** located at the top.



3. Enter the group name, assign the relevant permission type to the group and select the  button.



4. For existing users, you may wish to change the permission assigned by selecting a different permission type.



5. Enable/disable folder expiry or quota as it ought.
6. Click **Apply**.

The screenshot displays the EasiShare Web Portal interface. At the top, there is a header bar with columns: Name, Permission, Download, and Web Edit. Below this, a table lists users and their permissions. The first user is 'trampoline5' with 'Owner' permission. The second user is 'Projects Team' with 'Owner' permission. A dropdown menu is open for the 'Projects Team' user, showing options: Owner, Author, Contributor, and Reader. Below the table, there is an 'Options' section with two toggle switches: 'Folder Expiry' and 'Quota'. At the bottom, there are two buttons: 'Close' and 'Apply'.

Name	Permission	Download	Web Edit
trampoline5	Owner	<input type="checkbox"/>	<input type="checkbox"/>
Projects Team	Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Options

Folder Expiry ☐

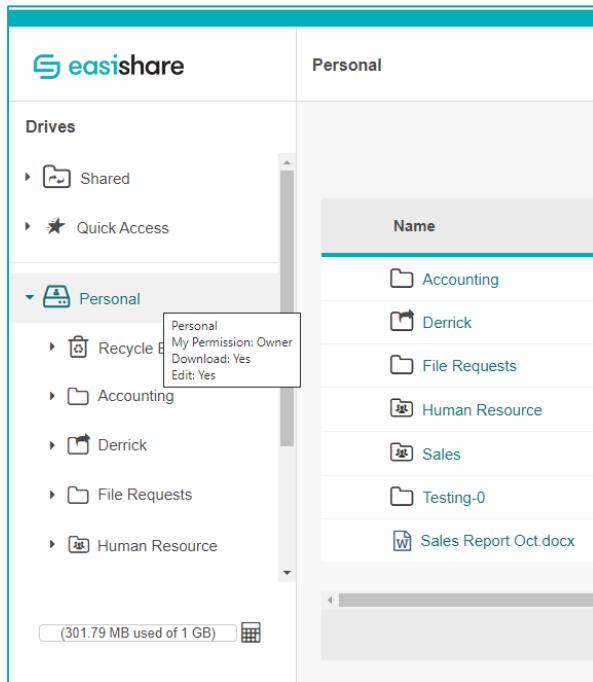
Quota ☐


Close Apply

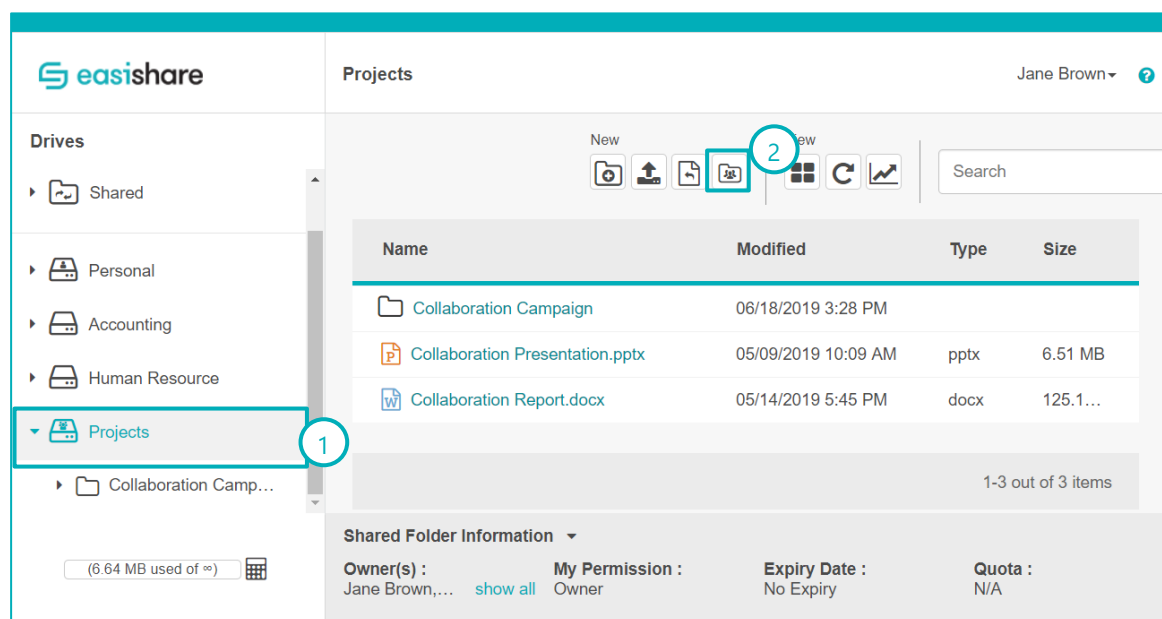
7.5 Manage Drive Permission

If you have been given the owner permission to a specific folder/drive, you can start to manage the permission to the drive.


Note: To check your own permissions given to the drive, you can hover to the drive and check the permission.

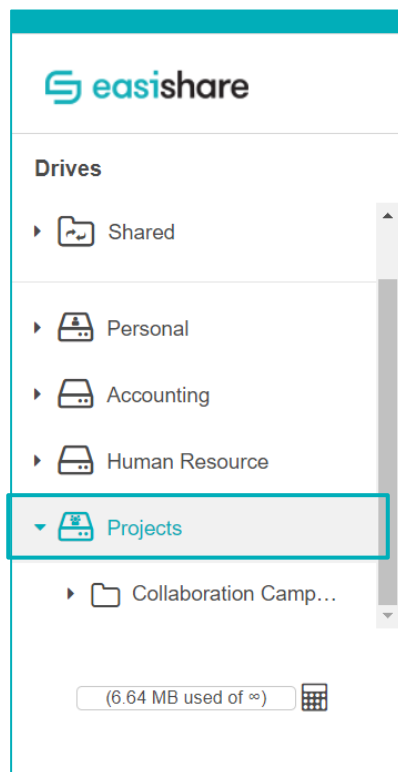


1. Navigate to the folder shared by internal users.
2. Click on **Manage**  along the **Action Pane** located at the top.



7.6 Access Shared Drive


1. A **Shared Drive** is a folder shared to you for collaboration among internal users. It is labelled with a different icon .
2. The user may access the Shared Drive by clicking on it.
3. Once your permission has been revoked, the user will not be able to see the folders under the Shared Drives.



Note: Internal users refer to users who have a registered account in EasiShare.



7.7 Shared Drive Information

1. **Click** on a shared drive with an icon .
2. The shared drive information will appear at the bottom.

Shared Folder Information ▼

Owner(s) : Jane Brown,... show all	My Permission : Owner	Expiry Date : No Expiry	Quota : N/A
---	---------------------------------	-----------------------------------	-----------------------

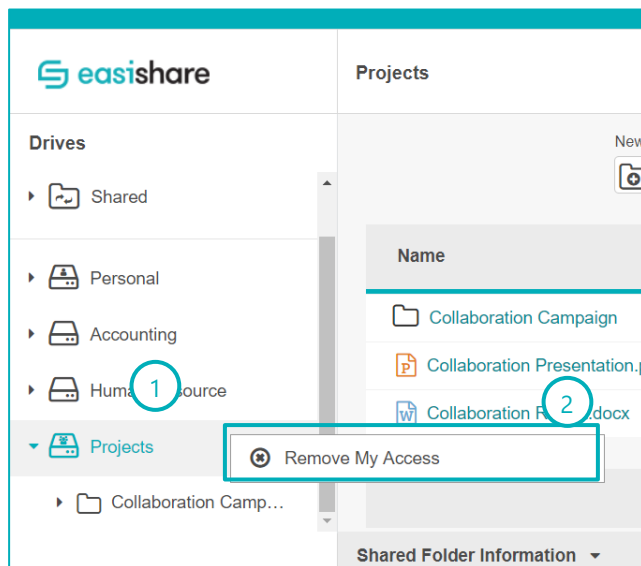
Heading	Description
Owner(s)	The list of owners of the shared drive
My Permission	User permission for the drive. Please refer to 7.2 for the list of permission types
Expiry Date	The expiry date of the shared drive
Quota	The drive space of the shared drive



7.8 Remove My Access from Shared Drive

If you no longer require the access to the shared drive, you can remove it from the drive list.

1. Right click the Shared Drive that you wish to remove.
2. Click on **Remove My Access**.
3. Type **remove**.
4. Click **Remove**.



Remove My Access

Are you sure you wish to remove yourself from **Projects**? You will no longer be able to access it. Please type **remove** to proceed.

3

✕ Cancel

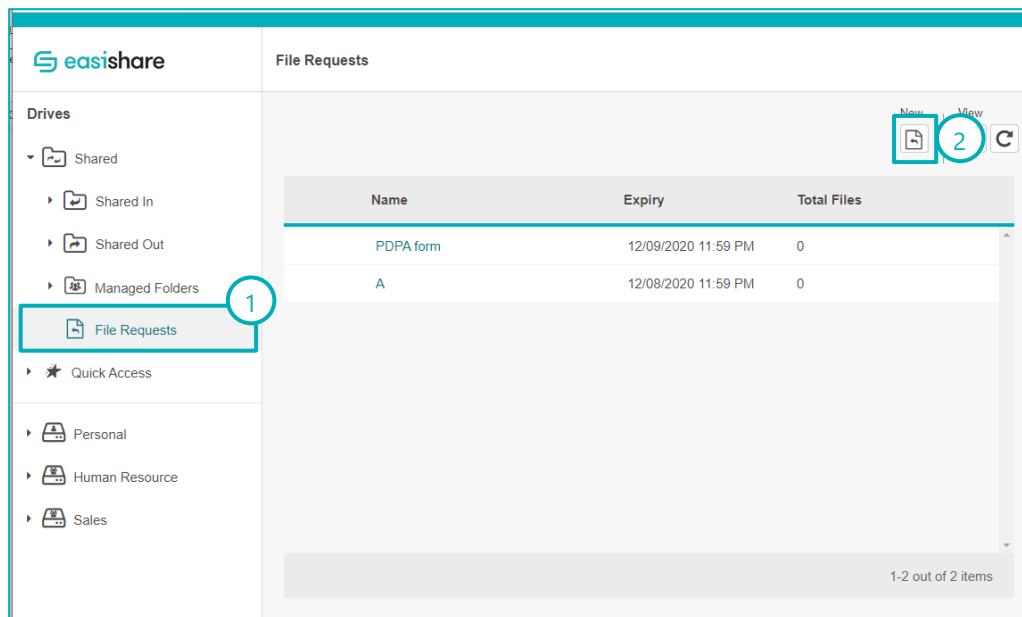
Remove


4

8 File Request to Receive Files from External Users

8.1 File request

1. Select **File Request** at the drive list.
2. Select **New File Request** at the **Action Pane** located at the top.



3. Enter the title of the file request
4. Enter the recipient's name, email and/or contact number. Contact number is only mandatory if you wish to enable One Time Password (OTP). Otherwise, you may leave it blank.
5. Click on  to confirm recipient. Alternatively, you can press **Enter**.
6. To import multiple recipients, click on **Manage Recipient** on the top right corner, click on **Import Recipient List** to browse for a CSV file to import a list of recipients with the headers **Name, Email** and **Mobile**.
7. You can also export an empty template by clicking on **Manage Recipient** on the top right corner, click on **Export Recipient List** for exporting a list of recipients' details that are added individually.
8. If you wish to create a group, add 2 or more recipients, click on **Manage Recipient** on the top right corner, then click on **Create Group**.
9. Enter your message.



3

Enter the title of your file request...

Manage Recipients ▾

6

Import Recipient List

7

Export Recipient List

8

Create Group

4

Name	Email	Mo
Name	Email	Mobile Phone No.

5

Options

Advanced Options

9

Message

Link Expires

OTP

Notifications

Per Upload

Summary

10

✕ Cancel

Send Request

Options

Advanced Options

No. of attempts

0

attempts

10

File size limit

0

MB

GB

File type restrictions

Allow all except

Block all except

11

✕ Cancel

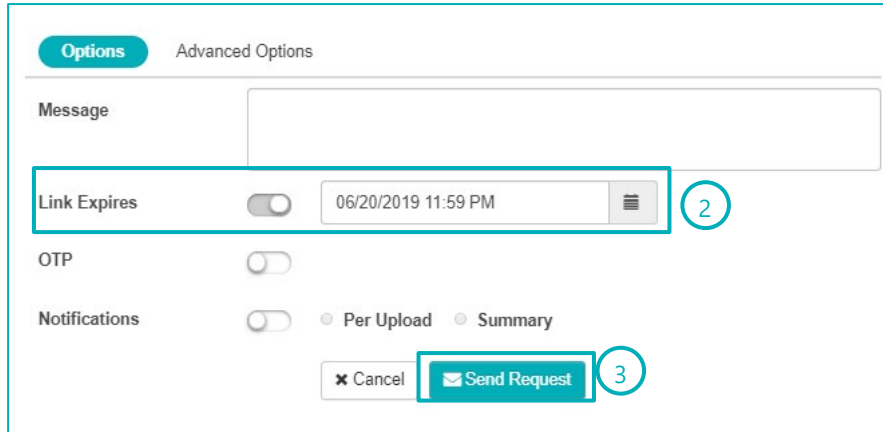
Send Request

10. Enable/Disable settings you wish to apply. To find out in details how each feature works, refer to the respective sections below.

11. Click **Send Request**.

8.1.1 File Request with Link Expiry

1. Refer to Section [File request](#) to begin requesting files.
2. Enable **Link Expiry**. Set the date and time by clicking on the calendar icon.
3. Click Send Request.



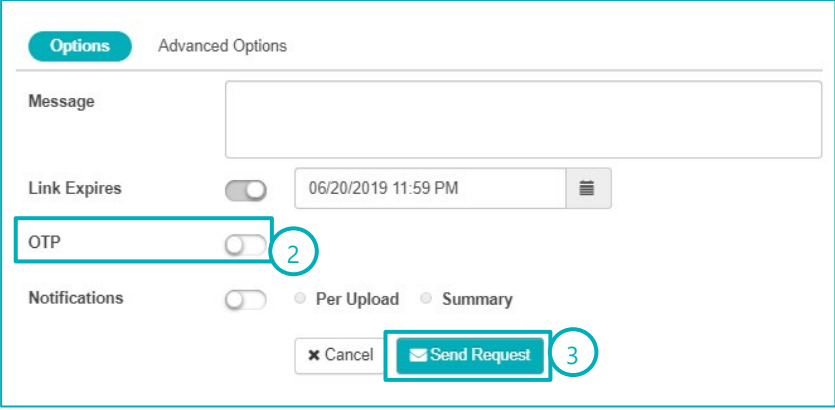
The screenshot shows the 'Advanced Options' section of a file request form. It includes a 'Message' text area, a 'Link Expires' section with a toggle switch and a date/time picker set to '06/20/2019 11:59 PM' with a calendar icon, an 'OTP' toggle switch, and 'Notifications' with radio buttons for 'Per Upload' and 'Summary'. At the bottom are 'Cancel' and 'Send Request' buttons. Numbered callouts 2 and 3 highlight the date/time picker and the 'Send Request' button respectively.

Note:

1. After the folder expires and a pre-defined number of days set by your central administrator, the folder will be automatically purged by the system.
2. Some features may be controlled by your central administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.

8.1.2 File request with OTP

1. Refer to Section [File request](#) to begin requesting files.
2. Enable **OTP**.
3. Click Send Request.



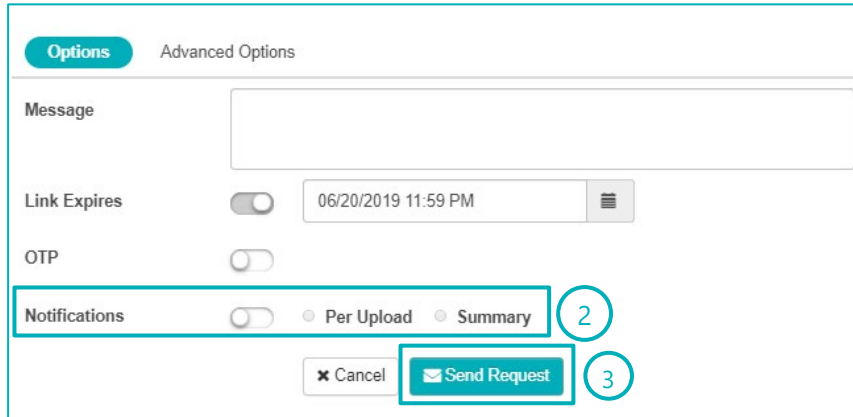
The screenshot shows the 'Advanced Options' section of a file request form. It contains a 'Message' text area, a 'Link Expires' date/time picker set to '06/20/2019 11:59 PM', an 'OTP' toggle switch (circled with a blue '2'), and 'Notifications' radio buttons for 'Per Upload' and 'Summary'. At the bottom are 'Cancel' and 'Send Request' buttons (the latter is circled with a blue '3'). A blue box highlights the 'OTP' toggle and the 'Send Request' button.

Note:

1. To enable OTP, contact number field is mandatory.
2. This feature may be controlled by your central administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.

8.1.3 Receive Notification When External Users Upload Files

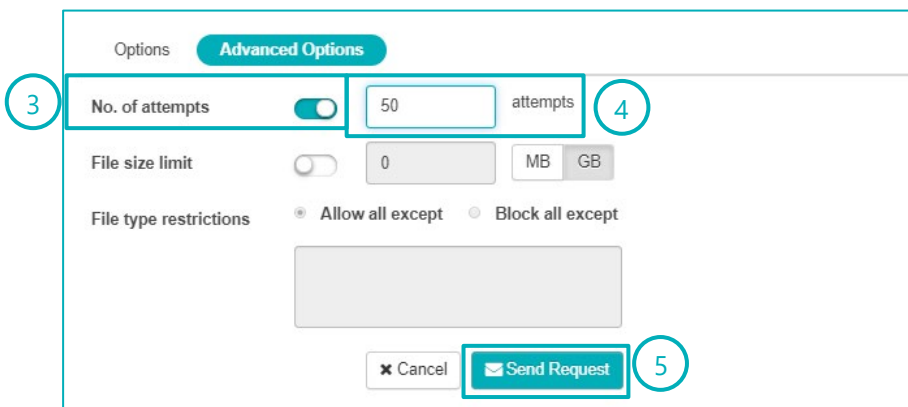
1. Refer to Section [File request](#) to begin requesting files.
2. Enable **Notifications**.
Per Upload: An email will be sent to your inbox whenever a file is uploaded
Summary: An email will be sent to your inbox at regular intervals to inform you of all uploads which occurred in the past time period.
3. Click Send Request.



The screenshot shows the 'Advanced Options' dialog box. The 'Notifications' section is highlighted with a red box and a circled '2'. The 'Per Upload' radio button is selected. The 'Send Request' button is highlighted with a red box and a circled '3'.

8.1.4 Restrict Number of Upload Attempts

1. Refer to Section [File request](#) to begin requesting files.
2. Navigate to the next page by clicking **Advanced Options**.
3. Enable **No. of attempts**.
4. Specify the number of attempts you wish to limit.
5. Click **Send Request**.

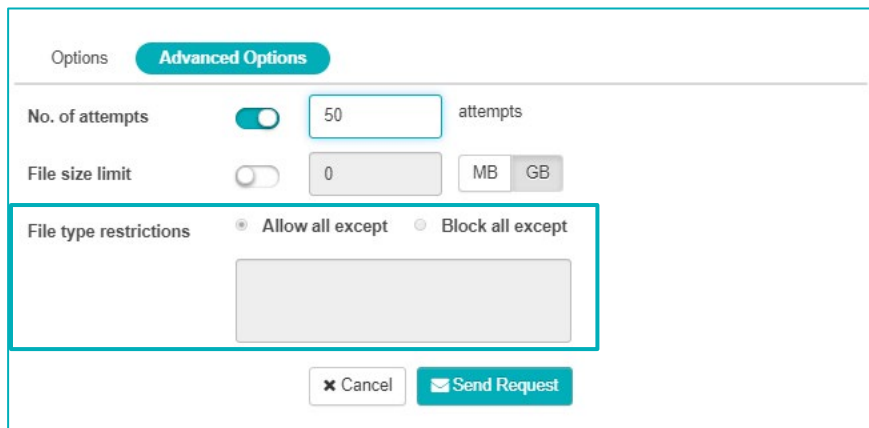


The screenshot shows the 'Advanced Options' dialog box. The 'No. of attempts' toggle is turned on, and the value '50' is entered in the adjacent text box. The 'Send Request' button is highlighted with a red box and a circled '5'.

Note: This feature may be controlled by your central administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.

8.1.5 Restrict File Types

1. Refer to Section [File request](#) to begin requesting files.
2. Navigate to the next page by clicking **Advanced Options**.
3. Enable **File Type Restrictions**.
4. Select either **allow all except** or **block all except**.
5. Specify the file types you wish to allow or block.
6. Click **Send Request**.

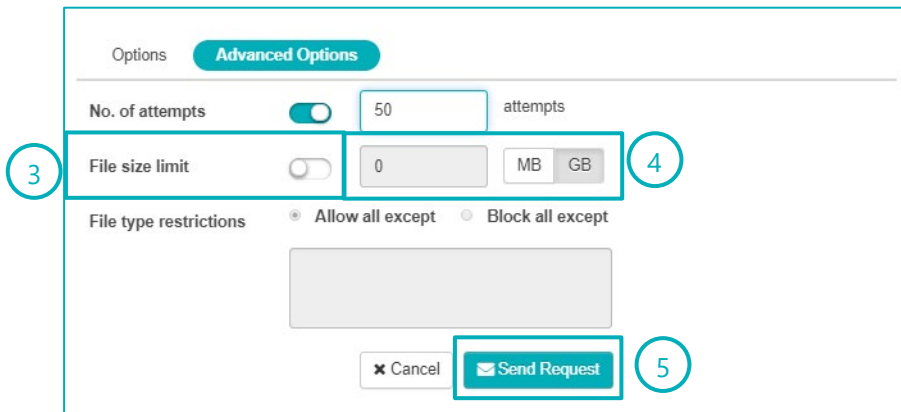


The screenshot shows the 'Advanced Options' section of a file request form. It includes a toggle for 'No. of attempts' set to 50, a 'File size limit' section with a toggle and a value of 0 (with MB and GB units), and a 'File type restrictions' section with radio buttons for 'Allow all except' (selected) and 'Block all except'. Below these is a large text area for specifying file types. At the bottom are 'Cancel' and 'Send Request' buttons.

Note: This feature may be controlled by your central administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.

8.1.6 Limit the File Upload Size

1. Refer to Section [File request](#) to begin requesting files.
2. Navigate to the next page by clicking **Advanced Options**.
3. Enable **File size limit**.
4. Specify the file size limit and select either MB or GB.
5. Click **Send Request**.



Options **Advanced Options**

No. of attempts ☒ 50 attempts

3 File size limit ☒ 0 **4** MB GB

File type restrictions ☒ Allow all except ☐ Block all except

5

Note: This feature may be controlled by your central administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.



8.2 Upload Files Using File Request

1. The recipient will receive an email notification
2. Click on the link provided.

Please upload the files [here](#) for **John Smith Contribution**.

Link expires on **20 Jun 2019 11:59 PM (UTC+8)**
Upload attempts have been set to 50.

Powered by **easishare™**

3. The recipient will be directed to the upload page.
4. Click on **Upload File** or simply **drag and drop** the files into the empty area.

John Smith Contribution

New

View

Name	Modified	Type	Size
Drag and drop your files into this window to upload			

Notes ▾

Allowed Attempts:
50 times

Link Expiry:
06/20/2019 11:59 PM

File Size Limit:
No file size restriction

File Type Restrictions:
No file type restriction



8.3 Access Uploaded Files on File Request


1. Click on the **Personal** drive.
2. Click on **File Request** on the left panel.
3. Click on the title of the file request you wish to access.
4. Click on the file name to download or select the file to perform other file operations.

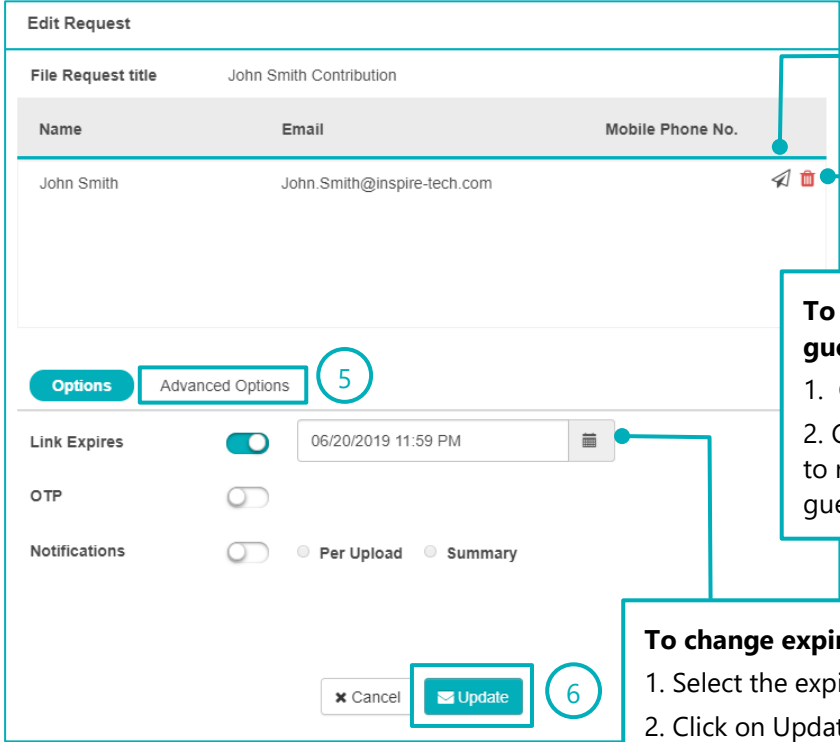
The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar is visible with the following items: Shared (expanded), Shared In, Shared Out, Managed Folders, File Requests (selected), Quick Access, Personal, Human Resource, and Sales. The main content area is titled 'File Requests' and contains a table with the following data:

Name	Expiry	Total Files
PDPA form	12/09/2020 11:59 PM	0
A	12/08/2020 11:59 PM	0

At the bottom right of the table area, it indicates '1-2 out of 2 items'.

8.4 Edit File Request

1. Select **File Request** drive.
2. Choose an active File Request to edit.
3. Click **Edit File Request**  located at the top.
4. A window will appear, follow the steps in each bubble for each intended purpose.
5. Click on the **Advanced Options** for more file settings.
6. Click on the Update button.




Edit Request

File Request title John Smith Contribution

Name	Email	Mobile Phone No.
John Smith	John.Smith@inspire-tech.com	

Options **Advanced Options** **5**

Link Expires ☒ 06/20/2019 11:59 PM 

OTP ☐

Notifications ☐ ☐ Per Upload ☐ Summary

6


To resend email
Click to resend email to guest user

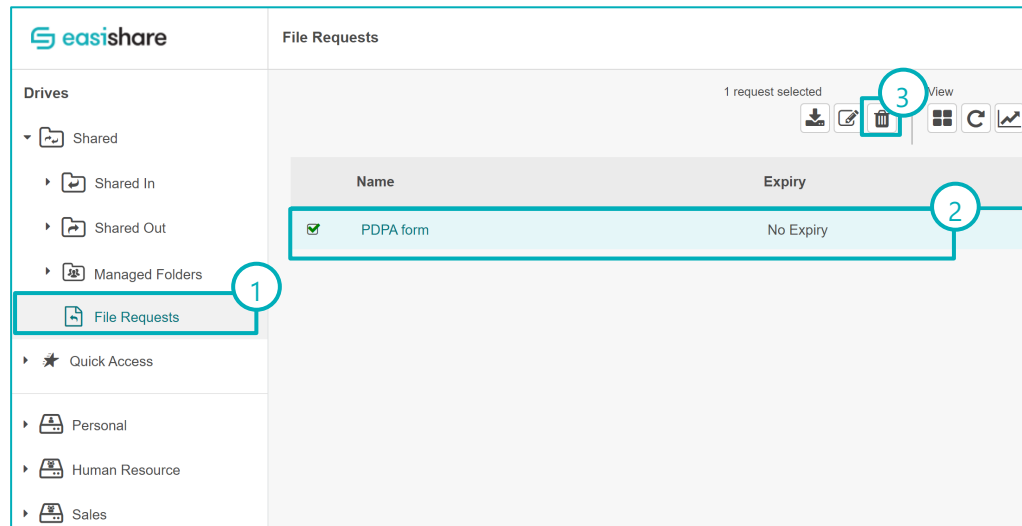
To remove one of the guest users
1. Click on delete icon
2. Click on Update button to remove one of the guest users

To change expiry date/time
1. Select the expiry date/time
2. Click on Update to update the expiry date/time & the guest user will receive an email again



8.5 Revoke File Request


1. Select **File Request** drive.
2. Select an active File Request to revoke.
3. Click **Revoke File Request**  located at the top.
4. A window will appear, click Delete to confirm File Request Revoke.

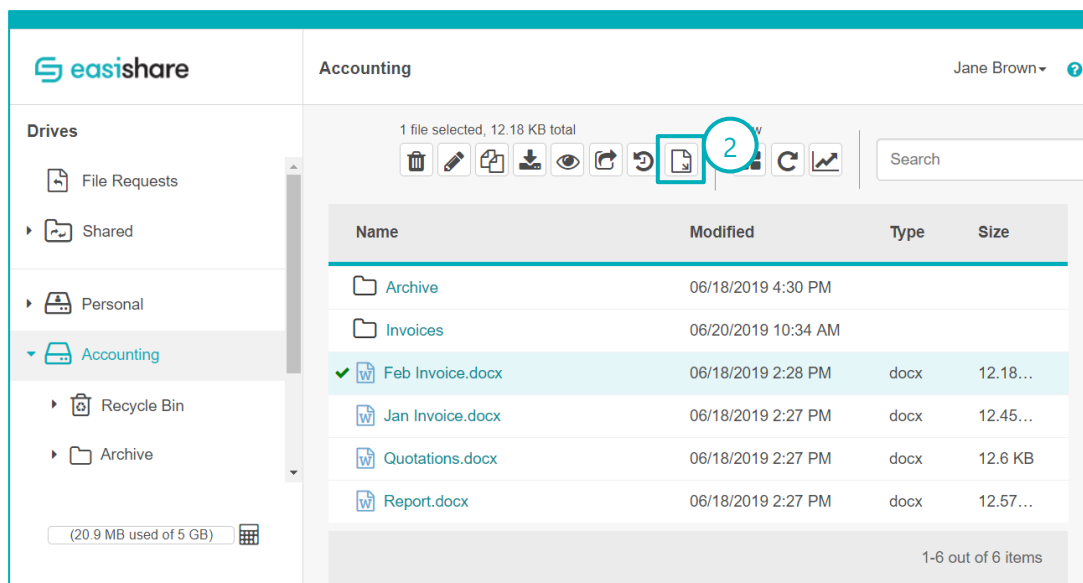


9 Check in/Out

When working in a shared environment, overwriting files can create challenges among users. To prevent files to be accidentally overwritten, users can initiate a check out first before editing the file. Once the file has been updated, user can upload the new version and check in. After the file has been checked in, other user can use the updated version to continue their editing.

9.1 Check Out a File

1. Select the file you wish to check out.
2. Click on **Check Out**  located at the top.



CHANGE!

3. A lock icon will appear on the file icon.
4. A check out success message will appear.



easishare Accounting File checked out successfully

Drives

- File Requests
- Shared
- Personal
- Accounting**
 - Recycle Bin
 - Archive

(20.9 MB used of 5 GB)

Accounting

New View

Name	Modified	Type	Size
Archive	06/18/2019 4:30 PM		
Invoices	06/20/2019 10:34 AM		
Feb Invoice.docx	06/18/2019 2:28 PM	docx	12.18...
Checked Out By: Jane Brown Checked Out At: 06/21/2019 9:34 AM	06/18/2019 2:27 PM	docx	12.45...
Quotations.docx	06/18/2019 2:27 PM	docx	12.6 KB
Report.docx	06/18/2019 2:27 PM	docx	12.57...

1-6 out of 6 items

CHANGE!

5. Hover over the lock icon to find the name of the user who checked out the file.
6. A new version will be created temporarily. This version is only visible to the user who checked out. Other users will only see the change in version after you have checked in.
7. You can choose to perform any file actions. All actions are available to the user who checked out. Other users will be able to perform some actions only.

File Versions

No.	Uploaded	Modified	Modified By	Size	Comments
0.3	06/21/2019 9:34 ...	06/18/2019 2:28 ...	Jane Brown	12.18 ...	
0.2	06/21/2019 9:33 ...	06/18/2019 2:28 ...	Jane Brown	12.18 ...	
0.1	06/18/2019 2:28 ...	06/18/2019 2:28 ...	Jane Brown	12.18 ...	


1-3 out of 3 items

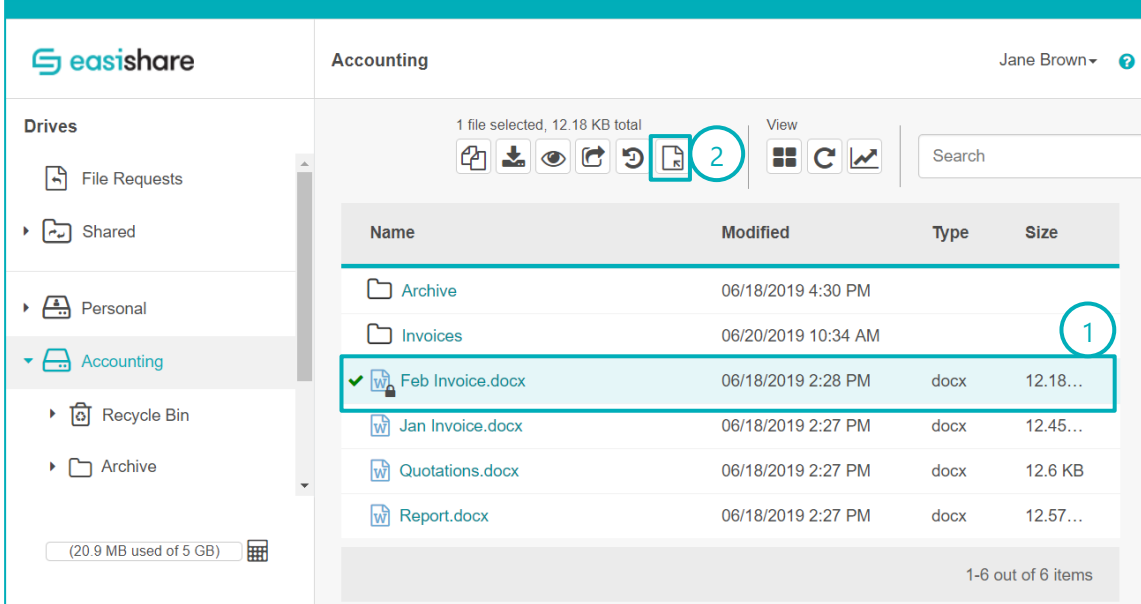
✕ Close

Note: Other users will be restricted from performing certain file operations such as delete, rename, copy/move on a file that has been checked out. Even when another user is sharing a file, the user is sharing based on the version that was prior to your check out.



9.2 Check In a File

1. Select the file that was checked out.
2. Click on **Check In**  located at the top.



The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar lists 'File Requests', 'Shared', 'Personal', 'Accounting' (selected), 'Recycle Bin', and 'Archive'. The 'Accounting' drive is selected, showing a file list with columns: Name, Modified, Type, and Size. The file 'Feb Invoice.docx' is selected, indicated by a green checkmark and a blue highlight. The 'Check In' icon in the top toolbar is circled with a '2'. The file 'Feb Invoice.docx' is circled with a '1'.

Name	Modified	Type	Size
Archive	06/18/2019 4:30 PM		
Invoices	06/20/2019 10:34 AM		
Feb Invoice.docx	06/18/2019 2:28 PM	docx	12.18...
Jan Invoice.docx	06/18/2019 2:27 PM	docx	12.45...
Quotations.docx	06/18/2019 2:27 PM	docx	12.6 KB
Report.docx	06/18/2019 2:27 PM	docx	12.57...

1-6 out of 6 items

CHANGE!

Check In

Feb Invoice.docx

Retain check out after checking in?
☐ Yes
☒ No

Comments:

✕ Cancel

✓ Ok




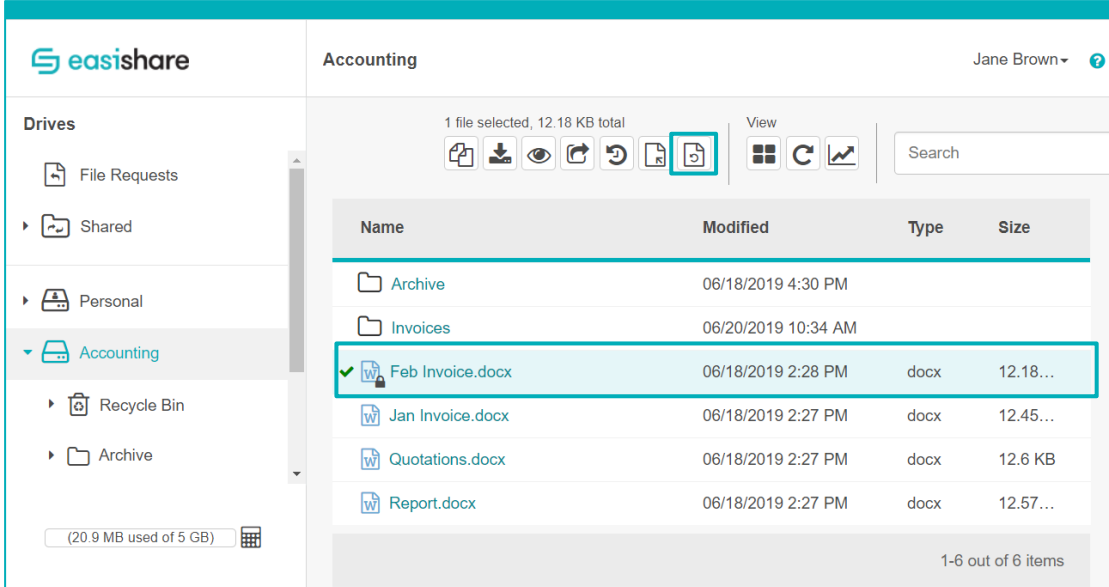
3. A pop-up window will appear. You may choose to retain check out after checking in and enter comments. Click **Ok**.
4. The lock icon on the file will disappear.
5. A check in success message will appear.
6. The version number that was created during check out will be recorded. This version is visible to all users.
7. After check in, all actions are available to all users. Any users can choose to perform any file actions as per normal.

File Versions					
No.	Uploaded	Modified	Modified By	Size	Comments
0.3	06/21/2019 9:34 ...	06/18/2019 2:28 ...	Jane Brown	12.18 ...	
0.2	06/21/2019 9:33 ...	06/18/2019 2:28 ...	Jane Brown	12.18 ...	
0.1	06/18/2019 2:28 ...	06/18/2019 2:28 ...	Jane Brown	12.18 ...	
					1-3 out of 3 items



9.3 Discard Check Out

1. Select the file that was checked out.
2. Click on **Discard Check Out**  located at the top.



The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar lists 'File Requests', 'Shared', 'Personal', 'Accounting' (selected), 'Recycle Bin', and 'Archive'. The main area displays the 'Accounting' drive with a table of files. The file 'Feb Invoice.docx' is selected, indicated by a green checkmark and a blue highlight. The table has columns for Name, Modified, Type, and Size. The top toolbar shows various icons, with the 'Discard Check Out' icon (a document with a red X) highlighted by a red box.

Name	Modified	Type	Size
Archive	06/18/2019 4:30 PM		
Invoices	06/20/2019 10:34 AM		
✓ Feb Invoice.docx	06/18/2019 2:28 PM	docx	12.18...
Jan Invoice.docx	06/18/2019 2:27 PM	docx	12.45...
Quotations.docx	06/18/2019 2:27 PM	docx	12.6 KB
Report.docx	06/18/2019 2:27 PM	docx	12.57...

1-6 out of 6 items

CHANGE!

3. A Discard Check Out confirmation pop-up will appear.
4. Select **Ok**.

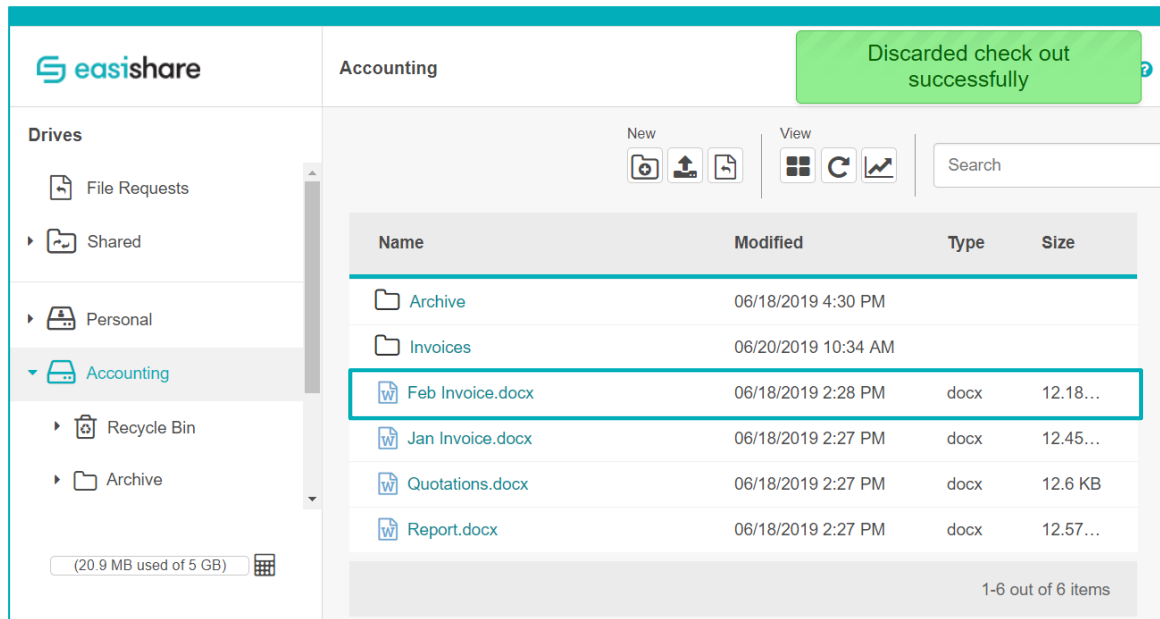
Discard check out?

If you discard your check out, you will lose all changes made to the document. Are you sure you want to discard your check out?

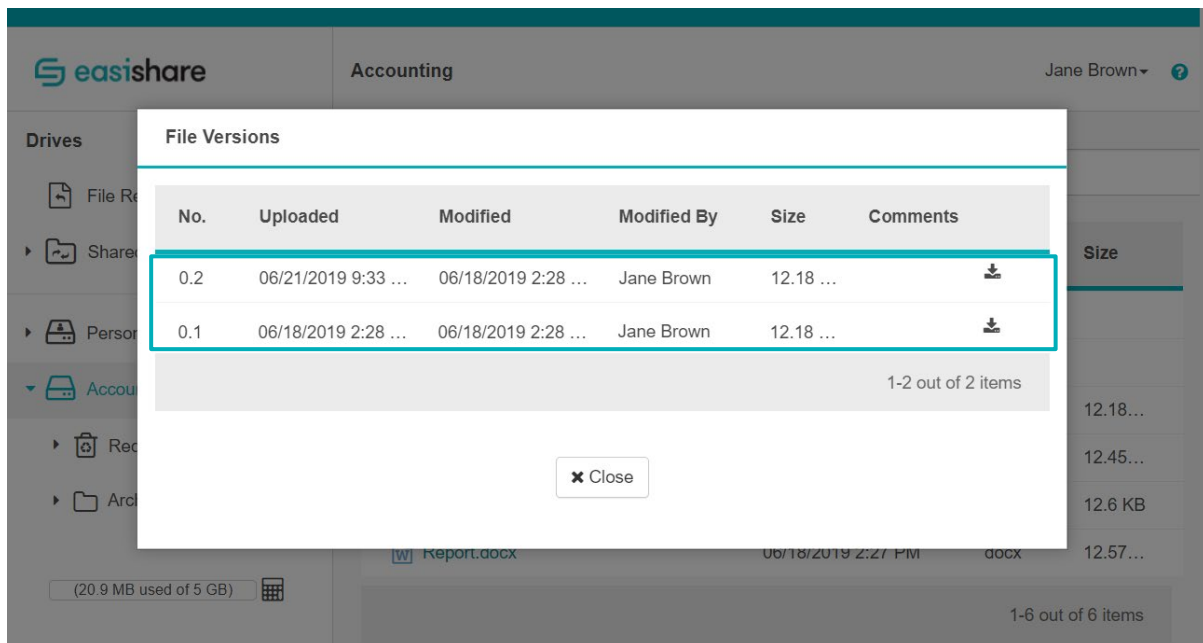
✕ Cancel
✓ Ok



5. A Discard Check Out success message will appear.



CHANGE!




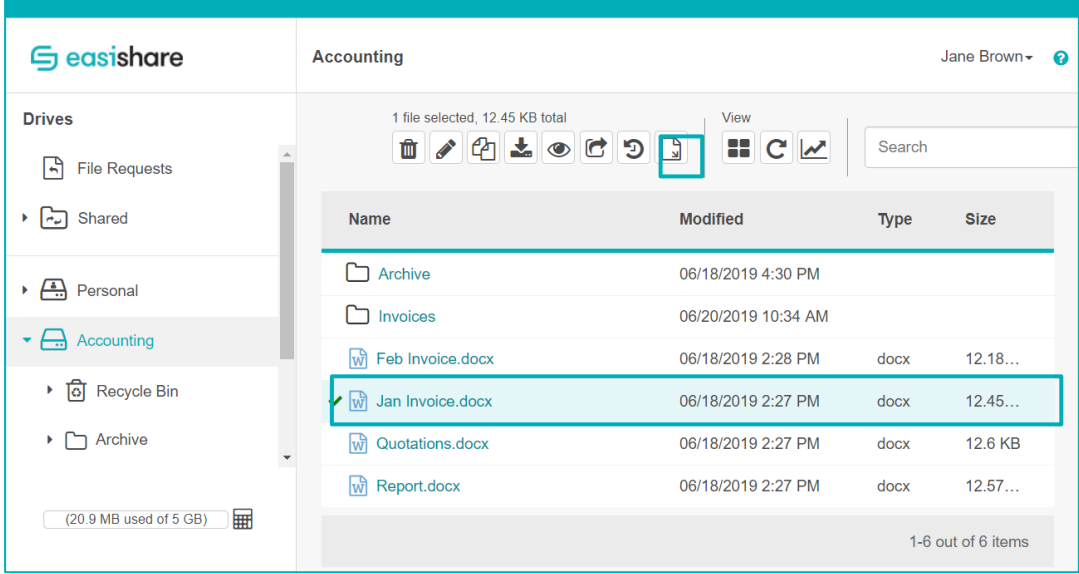
6. The version number that was created during check out will be discarded.
7. Any users can choose to perform any file actions as per normal. All actions are available to all users.



10 Versioning

10.1 View File Version

1. Select a file.
2. Click on **Versions**  located at the top.
3. A pop-window will appear.
4. A new version number will be created.

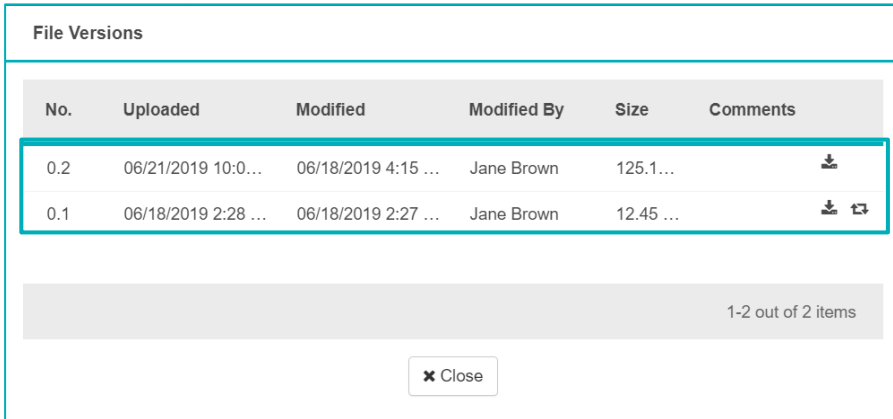


The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar lists 'File Requests', 'Shared', 'Personal', 'Accounting' (selected), 'Recycle Bin', and 'Archive'. The main area displays the 'Accounting' folder contents. A toolbar at the top of the file list includes icons for delete, edit, copy, download, view, share, and versions. The 'Versions' icon, which shows a document with a circular arrow, is highlighted with a red box. Below the toolbar, a table lists files in the Accounting folder:




Name	Modified	Type	Size
Archive	06/18/2019 4:30 PM		
Invoices	06/20/2019 10:34 AM		
Feb Invoice.docx	06/18/2019 2:28 PM	docx	12.18...
Jan Invoice.docx	06/18/2019 2:27 PM	docx	12.45...
Quotations.docx	06/18/2019 2:27 PM	docx	12.6 KB
Report.docx	06/18/2019 2:27 PM	docx	12.57...

The 'Jan Invoice.docx' file is highlighted with a red box. At the bottom right of the file list, it says '1-6 out of 6 items'.

CHANGE!



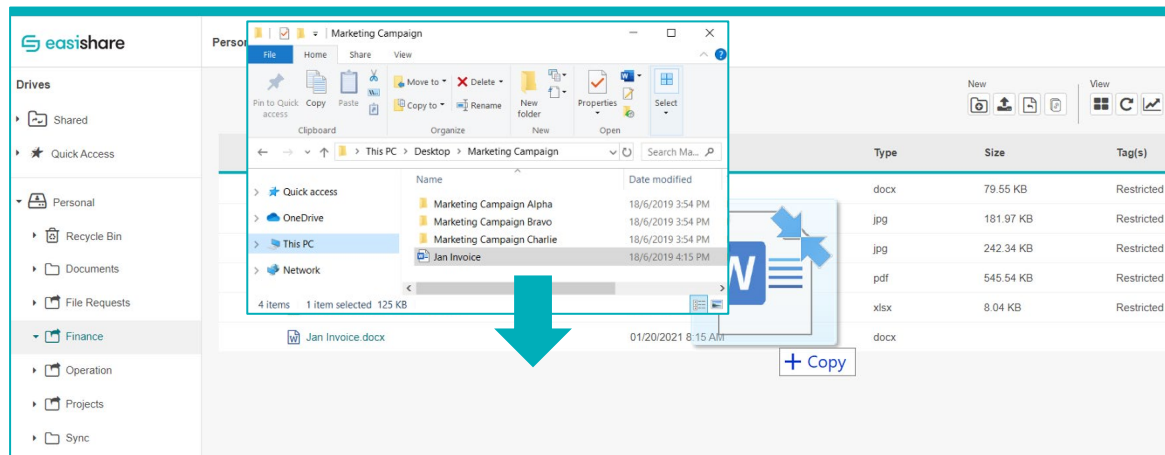
The screenshot shows a 'File Versions' pop-up window. It contains a table with the following columns: No., Uploaded, Modified, Modified By, Size, and Comments. The table lists two versions of a file:

No.	Uploaded	Modified	Modified By	Size	Comments
0.2	06/21/2019 10:0...	06/18/2019 4:15 ...	Jane Brown	125.1...	
0.1	06/18/2019 2:28 ...	06/18/2019 2:27 ...	Jane Brown	12.45 ...	 

At the bottom right of the table, it says '1-2 out of 2 items'. At the bottom center, there is a 'Close' button with a red 'X' icon.

10.2 Create New Version

1. Upload a file with the same name in the same folder.





Attention

File with same name already exists, overwrite?

- Jan Invoice.docx

✕ Cancel

✓ Overwrite

2. Click on the **Options**  located at the top.
3. Click on **Versions** .
4. A pop-up window will appear.
5. A new version number will be created.



easishare Personal > Finance

1 file selected, 11.58 KB total

2


Name	Modified	
Account books.docx	09/22/2020 3:45 PM	
Bank records - Dec 2020.jpg	05/01/2018 10:01 PM	
Bank records - Jan 2021.jpg	05/01/2018 10:01 PM	
Bank statement.pdf	06/19/2020 11:11 AM	
Bank transaction - Jan 2021.xlsx	12/01/2020 1:55 PM	xlsx 8.04 KB
Jan Invoice.docx	01/20/2021 8:16 AM	docx 11.58 KB

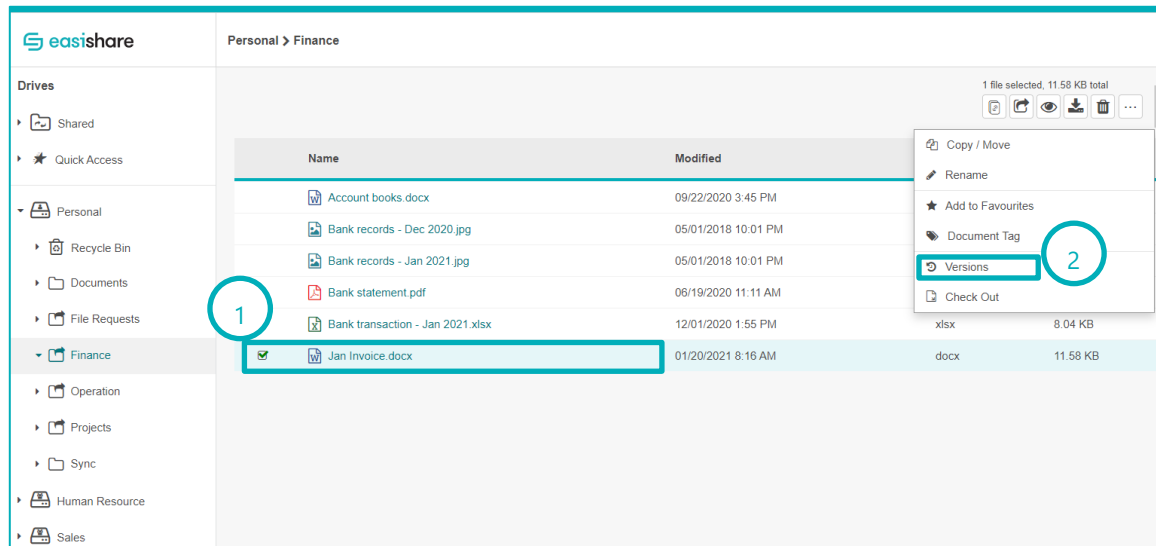
3

- Copy / Move
- Rename
- Add to Favourites
- Document Tag
- Versions
- Check Out

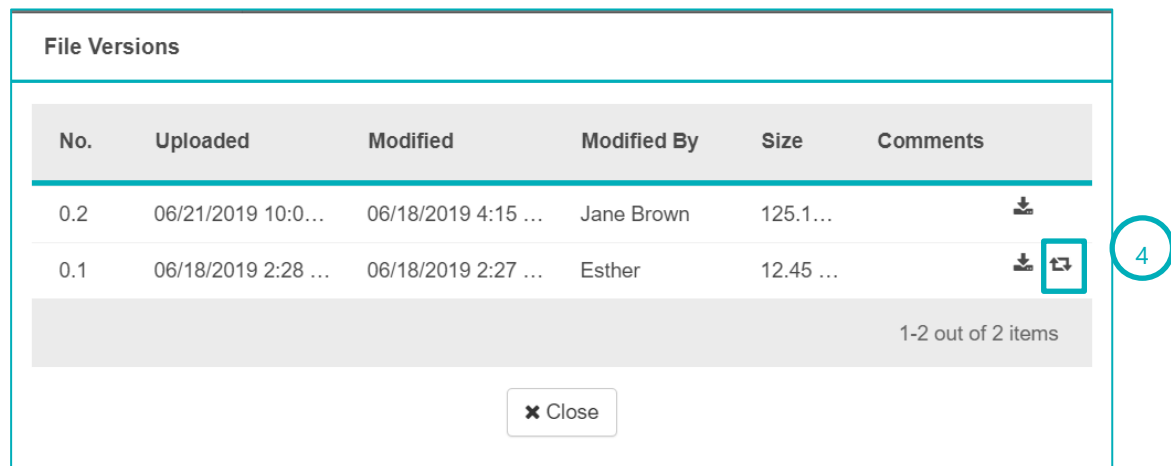
File Versions					
No.	Uploaded	Modified	Modified By	Size	Comments
0.3	06/25/2019 10:4...	06/25/2019 10:4...	Jane Brown	124.7...	
0.2	06/21/2019 10:0...	06/18/2019 4:15 ...	Jane Brown	125.1...	
0.1	06/18/2019 2:28 ...	06/18/2019 2:27 ...	Jane Brown	12.45 ...	
1-3 out of 3 items					
Close					

10.3 Restore Version

1. Select the file you wish to restore.
2. Click on **Versions**  located at the top.



3. A pop-up window will appear.
4. Click on the restore icon along the respective version you wish to restore to.





11 Monitor

You can get a notification via email whenever a file or folder is changed in your drive(s). You may see different options when you monitor a file or folder.

11.1 Monitor a file

1. Select the file that you wish to monitor
2. Right-click the file and select Monitor
3. Select the options






Option	Description
Changes > Modified	When the file has been overwritten
Changes > Deleted	When the file has been deleted
Changes > Unlocked	When the file is Discard Check-Out
Changes > Share Changed	When the file was shared
Frequency	To control when you will receive an email notification <ul style="list-style-type: none"> • Immediately • Daily (Default: 9AM) • Weekly (Default: Monday)
When	Available selection: <ul style="list-style-type: none"> • Any changes • Someone else changes • Any changes to document created by me • Someone else changes document created by me • Someone else changes document last edited by me






4. Click on Monitor
5. Once successful added to Monitor, you should see a Monitor icon beside the file.
6. You can check all Monitored files in Quick Access > Monitor

11.2 Monitor a folder






1. Select the folder that you wish to monitor


1 folder selected


    


Name	Modified	Type
  Accounting	11/25/2020 8:48 PM	
 File Requests	12/02/2020 10:27 AM	
 Human Resource	11/25/2020 8:50 PM	
 Sales	11/25/2020 8:51 PM	


2. Right-click the folder and select Monitor


Name	Modified	Type
  Accounting		
 File Requests		
 Human Resource		
 Sales		


 Copy Path


 Manage


 Share


 Download


 Delete

 Copy / Move


 Rename

 Add to Favourites

 Monitor

 Create Workflow

3. Select the options

 **Monitor Accounting**

Change

☐ New Uploads
☐ File Modified
☐ File Deleted
☐ File Unlocked
☐ Share Changed
☐ Manage Changed

Frequency


Immediately

When

Any changes

✕ Cancel


■ Stop

 Monitor

Option	Description
Changes > New Uploads	When a file is uploaded in the folder and any of its subfolders
Changes > File Modified	When any file has been overwritten
Changes > File Deleted	When any file has been deleted
Changes > File Unlocked	When any file is Discard Check-Out
Changes > Share Changed	When any file was shared
Changes > Manage Changed	<p>When the folder and any of its subfolders has added/removed/edited managed permissions</p> <p>Note: This selection only affects folders and the following 'When' Options do not apply:</p> <ul style="list-style-type: none"> Any changes to document(s) created by me Someone else changes document(s) created by me Someone else changes document(s) last edited by me
Frequency	<p>To control when you will receive an email notification</p> <ul style="list-style-type: none"> Immediately Daily (Default: 9AM) Weekly (Default: Monday)

When	<p>Available selection:</p> <ul style="list-style-type: none"> Any changes Someone else changes Any changes to document(s) created by me Someone else changes document(s) created by me Someone else changes document(s) last edited by me
------	---

4. Click on Monitor

 **Monitor Accounting**

Change

☐ New Uploads

☐ File Modified

☐ File Deleted

☐ File Unlocked

☐ Share Changed


☐ Manage Changed

Frequency






Immediately

When

Any changes

✕ Cancel ■ Stop  Monitor 4

5. Once successful added to Monitor, you should see a Monitor icon beside the folder.

Name	5	Modified
 Accounting		11/25/2020 8:48 PM
 File Requests		12/02/2020 10:27 AM
 Human Resource		11/25/2020 8:50 PM
 Sales		11/25/2020 8:51 PM

6. You can check all Monitored files in Quick Access > Monitor



Name	Drive	Location	Change	When
Accounting	Personal		New Uploads, File Mo...	AnyChange

11.3 Stop Monitoring a File/Folder

1. Select the file/folder that you wish to stop Monitoring


Name		Modified	1
<input type="checkbox"/>	Accounting	11/25/2020 8:48 PM	
	File Requests	12/02/2020 10:27 AM	
	Human Resource	11/25/2020 8:50 PM	
	Sales	11/25/2020 8:51 PM	

2. Right-click the folder and select Monitor

Name	Modified	Type	Size	Tag(s)
<input checked="" type="checkbox"/> Accounting	11/25/2020 8:48 PM			
File Requests	12/02/2020 10:27 AM			
Human Resource	11/25/2020 8:50 PM			
Sales	11/25/2020 8:51 PM			

☐ Copy Path
☐ Manage
☐ Share
☐ Download
☐ Delete
☐ Copy / Move
☐ Rename
☐ Add to Favourites
☒ Monitor
☐ Create Workflow

3. Click on Stop

 **Monitor Accounting**

Change

- ☒ New Uploads
- ☒ File Modified
- ☒ File Deleted
- ☐ File Unlocked
- ☐ Share Changed
- ☐ Manage Changed

Frequency


Immediately

When

Any changes

✕ Cancel

■ Stop

3  Monitor

12 Workflow






This section shows you how to create a share approval workflow that requires everyone (all/any assigned approvers) to agree for a share request to be approved.





This is useful in an organisation that requires sharing requests of certain documents to be approved.

12.1 Owner Creates Workflow

1. Select the file/folder that you wish to create a workflow

1 folder selected

Name	Modified	Type
<input checked="" type="checkbox"/>  Accounting	11/25/2020 8:48 PM	
 File Requests	12/02/2020 10:27 AM	
 Human Resource	11/25/2020 8:50 PM	
 Sales	11/25/2020 8:51 PM	

2. Right-click and select Create Workflow

Name	Modified	Type	Size	Tag(s)
<input checked="" type="checkbox"/> Accounting	11/25/2020 8:48 PM			
<input type="checkbox"/> File Requests	12/02/2020 10:27 AM			
<input type="checkbox"/> Human Resource	11/25/2020 8:50 PM			
<input type="checkbox"/> Sales	11/25/2020 8:51 PM			

Copy Path
Manage
Share
Download
Delete
Copy / Move
Rename
Add to Favourites
Monitor
Create Workflow

3. Select the approver(s)
4. Select "All must approve" or "Anyone can approve"
5. Click on Apply

Share Approval Workflow

Select user or group who can approve sharing of this file(s) ?

Name	
<input checked="" type="checkbox"/> Jane Brown	
<input checked="" type="checkbox"/> John Smith	

Options





Share when ?

☒ ALL must approve
☐ ANYONE can approve

Close Apply

12.2 Owner Edits Workflow

1. Select the file/folder that you wish to edit a workflow
2. Right-click and select Edit Workflow

Name	Modified	Type	Size	Tag(s)
<input checked="" type="checkbox"/>  Accounting	25/11/2020 8:48 PM			
 File Requests	02/12/2020 10:27 AM			
 Human Resource	25/11/2020 8:50 PM			
 Sales	25/11/2020 8:51 PM			

1

Copy Path

Manage

Share

Download

Delete

Copy / Move

Rename

Add to Favourites

Monitor

Edit Workflow


at of 4 items


3. Select the approver(s)
4. Select "All must approve" or "Anyone can approve"
5. Click on Apply

Share Approval Workflow

Select user or group who can approve sharing of this file(s) ?

Name

☒  Jane Brown

☒  John Smith

3

Options

Share when ?

☒ ALL must approve

☐ ANYONE can approve

4

✕ Close

5

12.3 User Checks Pending Approvals and Remind Approvers

1. User shares a file/folder as per Share section

Note: A Share Approval Workflow appears if a Workflow was created. Click on Proceed

Share Approval Workflow

Share approval request will be sent to the following user(s):

- Mary Brown

File(s) will be shared to recipient(s) if **ALL** the user(s) above approve the request

✕ Cancel

✓ Proceed

1

2. To check on Shares pending for approval, click on Shared > Pending
3. To send a reminder, select a pending Share
4. Click on Send Reminder on the top right

easishare

Shared to All Users

Drives

Shared

Pending

Mary Brown

John Smith

Shared In

Shared Out

1 folder selected

Download

Share

Send Reminder

4

Name

Expiry

Type

✓

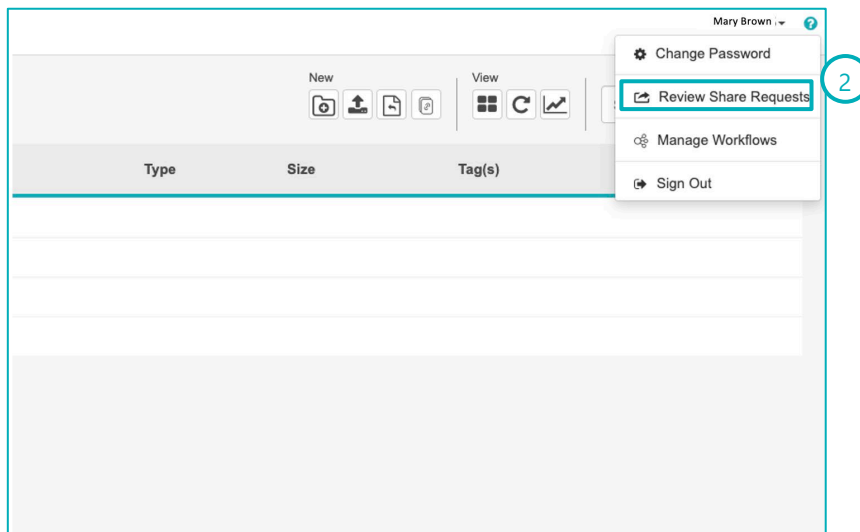
Accounting

Human Resource

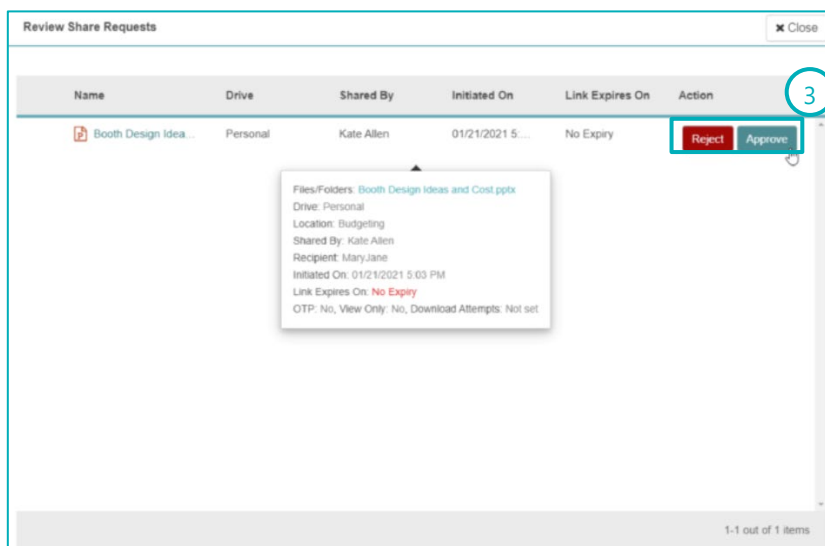
Sales

12.4 Approvers Approve or Reject with Comments

1. To review a Share Request, navigate to Review Share Request
2. Click on Review Share Request



3. Select Approve or Reject



4. If Reject was selected, enter a reason for the rejection for the user.
5. Click on OK.