

# **EasiShare Web Portal User Guide**

V12.1

(For EasiShare User)



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## 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 directly take effect in Storage.

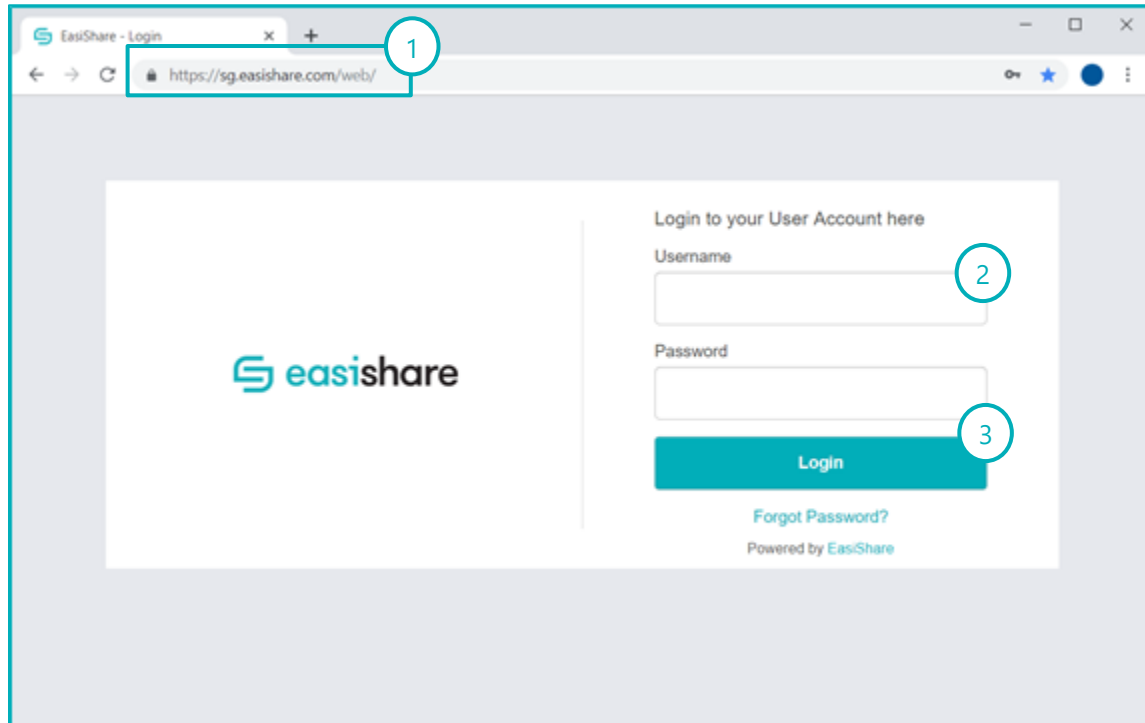


## 2 Login

### 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

- 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 area displays a list of drives. Annotations with arrows point to specific elements:

- An arrow points to the 'Shared' drive, with a text box stating: "Files & Folders that you have shared or been shared by EasiShare users to you."
- An arrow points to the 'File Requests' item, with a text box stating: "Request to non-EasiShare account users for file upload and after they have uploaded the file(s), you can download from here"
- An arrow points to the 'Personal' drive, with a text box stating: "Personal Drives dedicated where you have permission to"
- A dashed arrow points to the 'Sales' drive, with a text box stating: "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."

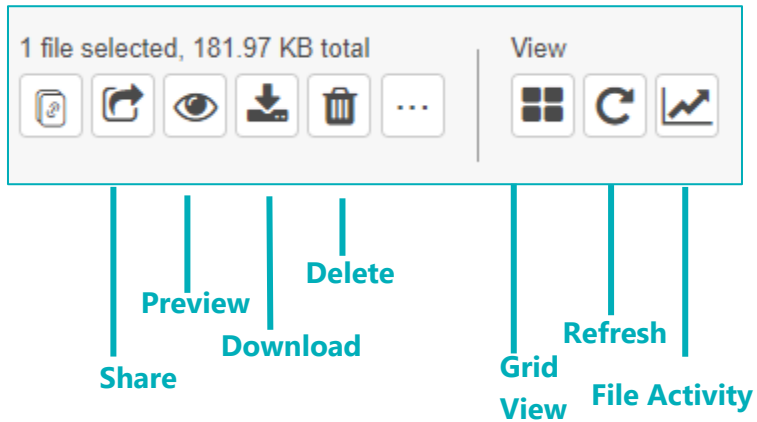
- On this page, User able to view all the drive(s) assigned are in the Drive List on the left panel. Also can view the actions like create, upload request, search, refresh, Delete, View file activity etc..

The screenshot shows the EasiShare web portal interface with the 'Personal > Finance' drive selected. The left sidebar shows the 'Drives' section with 'Personal' expanded, listing 'Recycle Bin', 'Documents', 'File Requests', 'Finance', 'Operation', 'Projects', 'Sync', 'Human Resource', and 'Sales'. The main area displays the 'Drive Content' table. Annotations include:



- A box labeled "Action buttons" points to the top right of the table, showing icons for create, upload, search, refresh, delete, and view file activity.
- A box labeled "Drive Content" points to the table listing files.
- A box labeled "Drive List" points to the 'Finance' drive in the left sidebar.

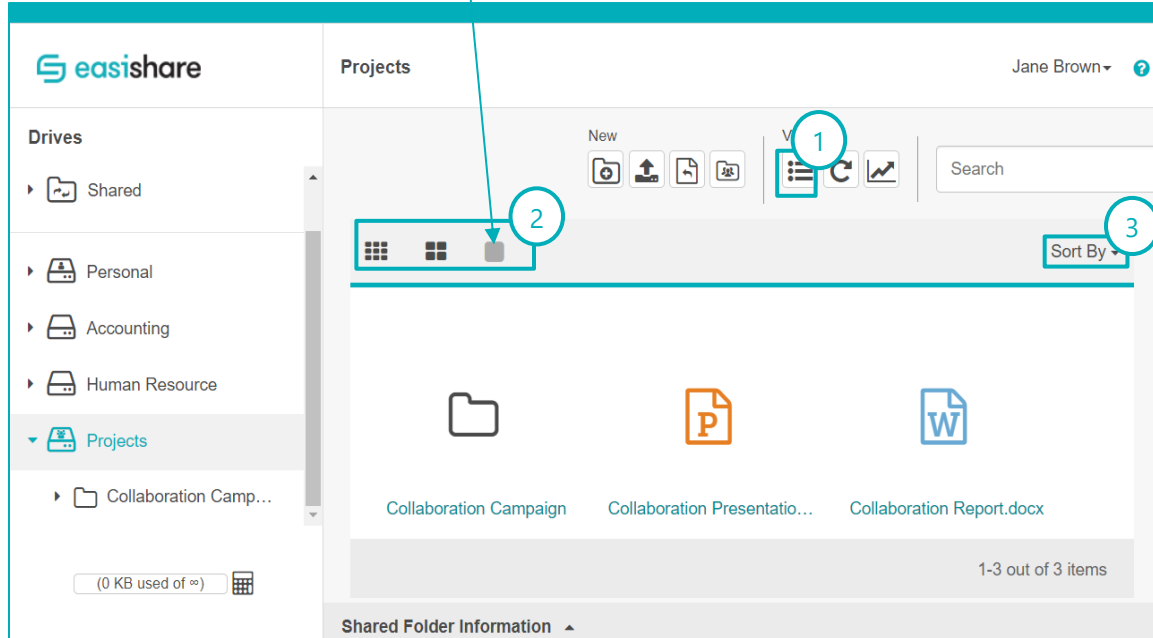
Name	Modified	Type
<input checked="" type="checkbox"/> Bank records - Dec 2020.jpg	05/01/2018 10:01 PM	jpg
Bank records - Jan 2021.jpg	05/01/2018 10:01 PM	jpg
Bank statement.pdf	06/19/2020 11:11 AM	pdf
Bank transaction - Jan 2021.xlsx	12/01/2020 1:55 PM	xlsx
Account books.docx	09/22/2020 3:45 PM	docx

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

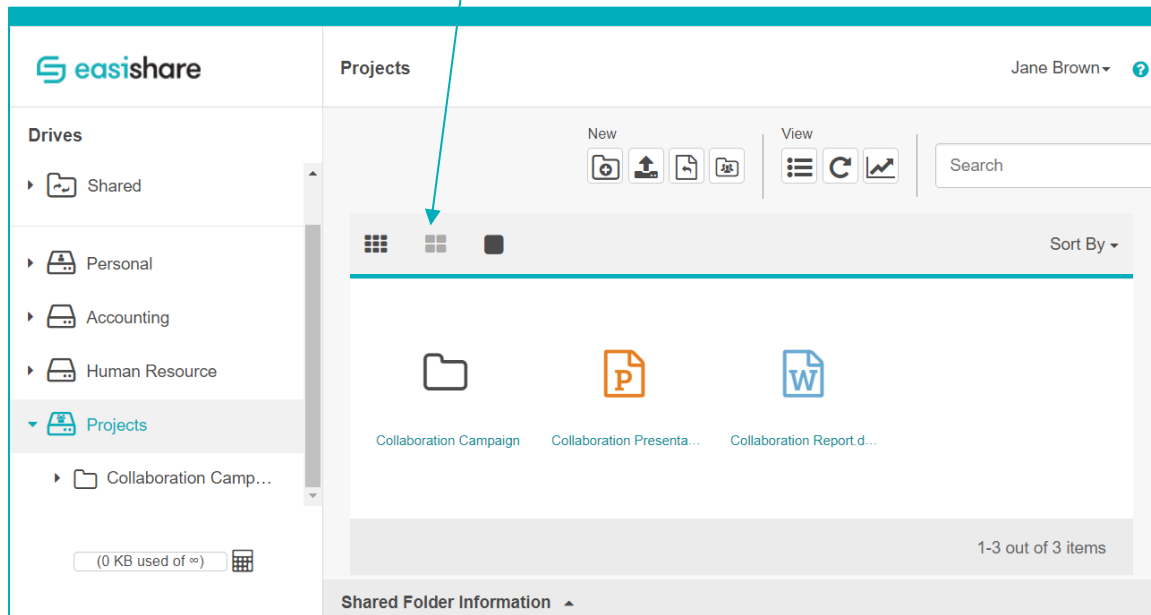


## 2.3 Switching Views

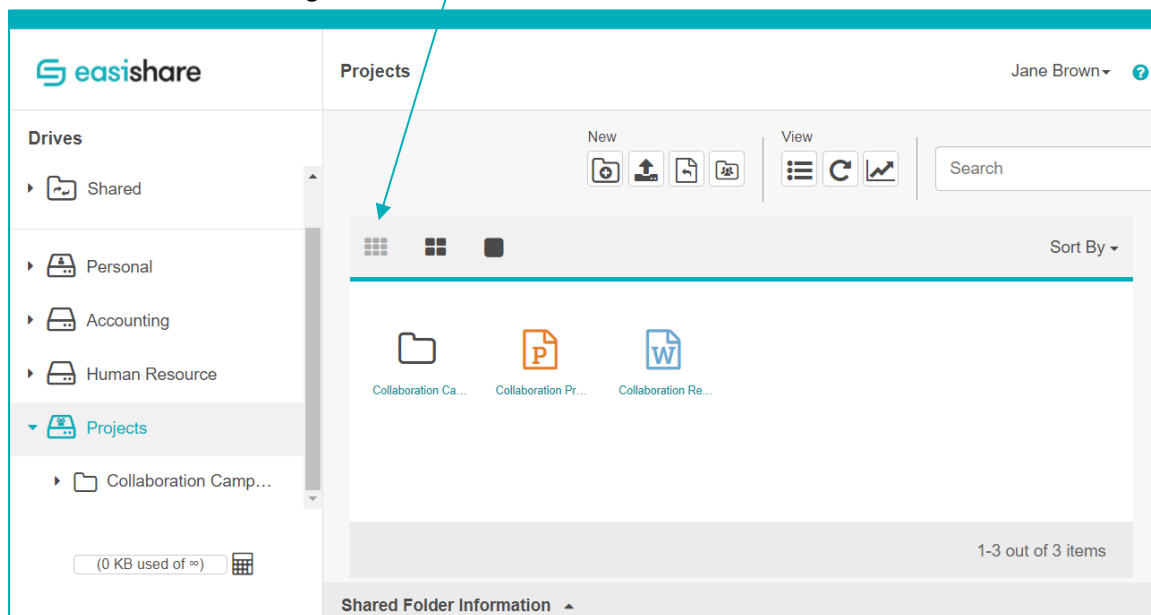
- Click the Grid view icon  on the Tools menu, if the user is in Grid view mode the icon display will change to List view icon , vice versa.
- Three Sizes of choice are given, from left to right, small, medium and large views.
- User will be able to Sort according to their preference with the help of 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 in Grid mode. The sidebar on the left lists 'Drives' including Shared, Personal, Accounting, Human Resource, and Projects. The main area is titled 'Projects' and shows a 'Sort By' dropdown menu with options: Name, Modified, and Size. The main area displays three items: 'Collaboration Ca...', 'Collaboration Pr...', and 'Collaboration Re...'. A status bar at the bottom indicates '1-3 out of 3 items'.

(In list mode)

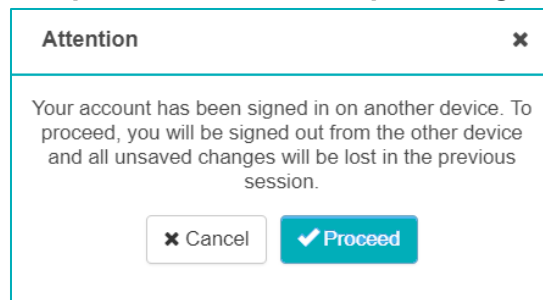
The screenshot shows the EasiShare web portal in List mode. The sidebar on the left lists 'Drives' including Shared, Personal, Accounting, Human Resource, and Projects. The main area is titled 'Projects' and displays a table with the following data:

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...

A status bar at the bottom indicates '1-3 out of 3 items'.

## 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.



The screenshot displays the EasiShare web portal interface. The left sidebar shows a list of drives: Shared, Personal, Accounting, Human Resource, and Projects. The 'Projects' drive is selected, indicated by a blue highlight and a circled '1'. The main content area shows a table of files under the 'Projects' section. The table has columns for Name, Modified, Type, and Size. The files listed are: Collaboration Campaign (folder), Collaboration Presentation.pptx (6.51 MB), and Collaboration Report.docx (125.1...). A 'New' button is visible above the table, and a circled '2' highlights it. A text input field for the file name is also present, with a circled '3' highlighting it. The interface also includes a search bar and a 'View' dropdown menu.


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...

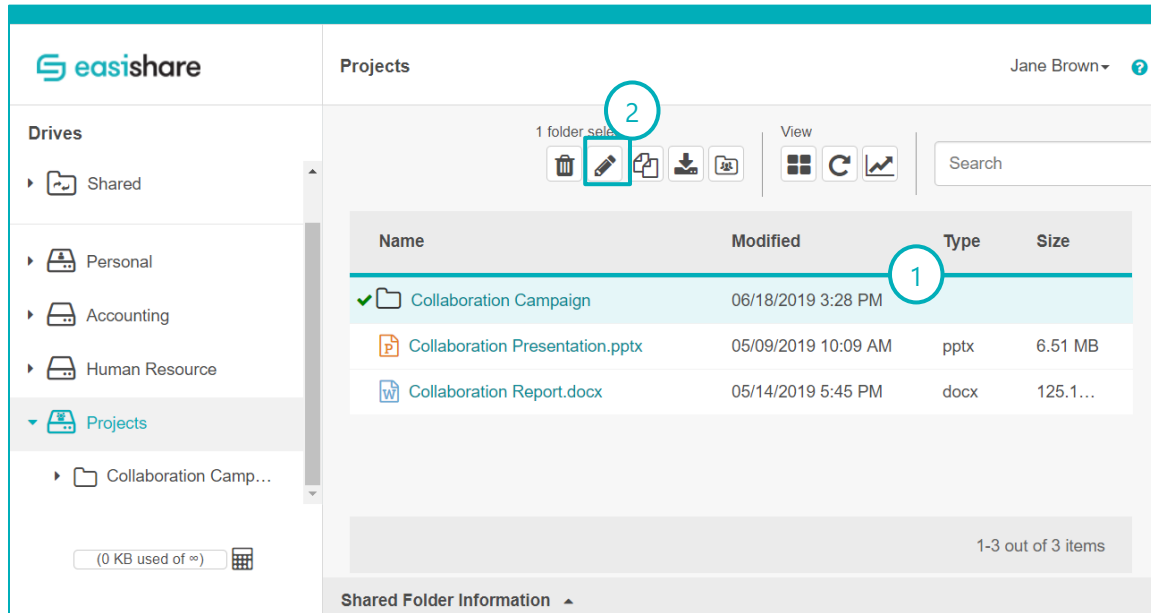
1-3 out of 3 items

Shared Folder Information ▲



### 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.

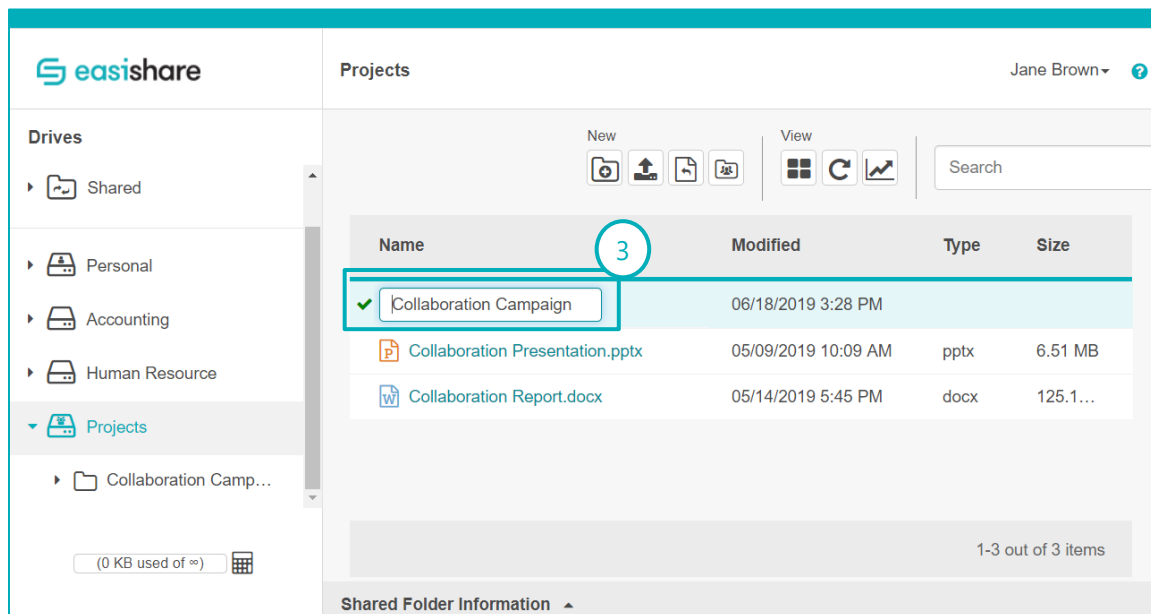


The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar lists 'Shared', 'Personal', 'Accounting', 'Human Resource', and 'Projects'. The 'Projects' drive is selected, showing a folder named 'Collaboration Camp...'. The main area displays a table of items under the 'Projects' heading. The table has columns: Name, Modified, Type, and Size. The first row is 'Collaboration Campaign', which is selected (indicated by a green checkmark and a blue highlight). A red circle with the number '1' is placed over the folder name. Above the table, there is an action pane with icons for 'New', 'Rename', 'Copy', 'Download', and 'Share'. A red circle with the number '2' is placed over the 'Rename' icon. The table contains the following data:

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...

At the bottom right of the table, it says '1-3 out of 3 items'. Below the table is a section for 'Shared Folder Information'.

3. Enter new folder name.

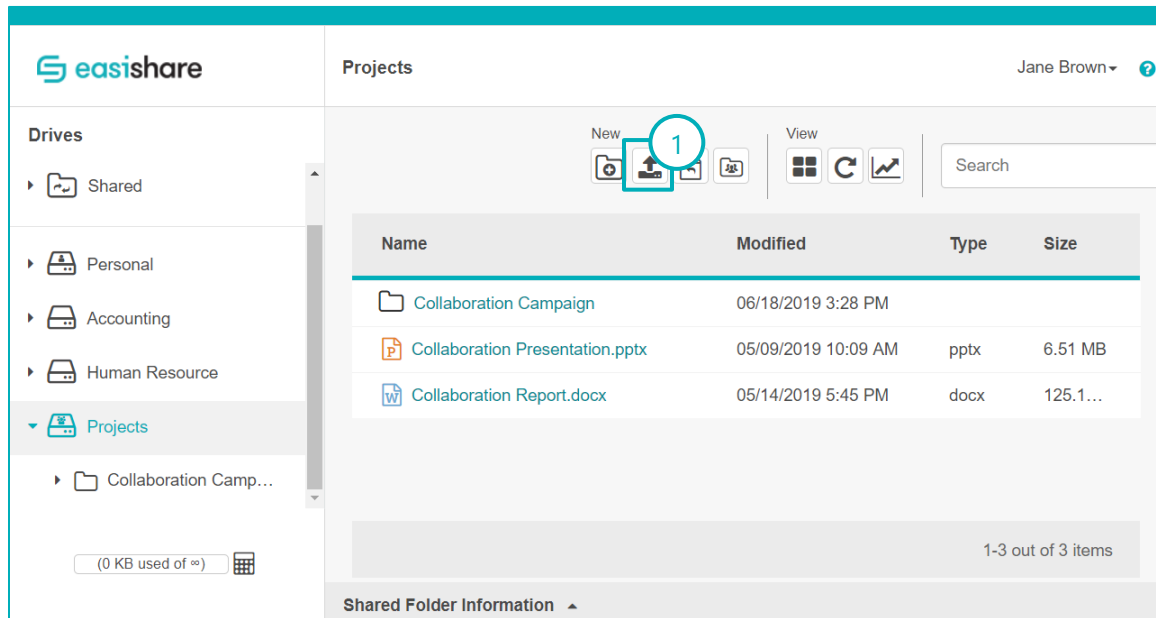


This screenshot shows the same EasiShare web portal interface as the previous one, but with the 'Collaboration Campaign' folder name highlighted in a text input field. A red circle with the number '3' is placed over the folder name, indicating where to enter the new name. The rest of the interface remains the same.

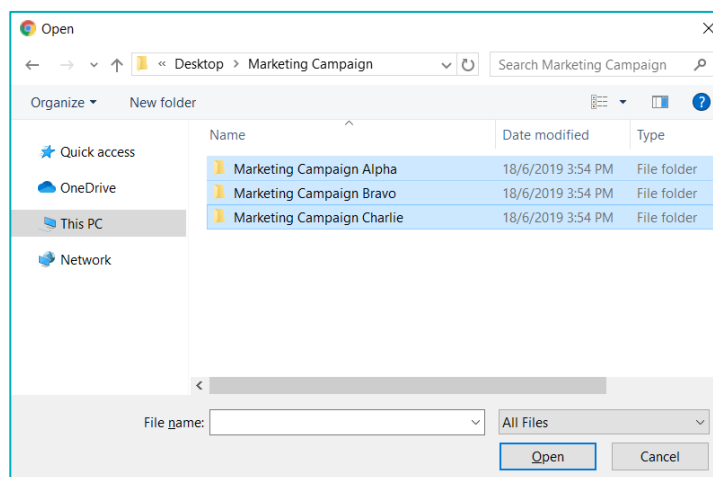
## 4 Upload Files

### 4.1 Using Upload Feature

1. Click on **Upload File** .



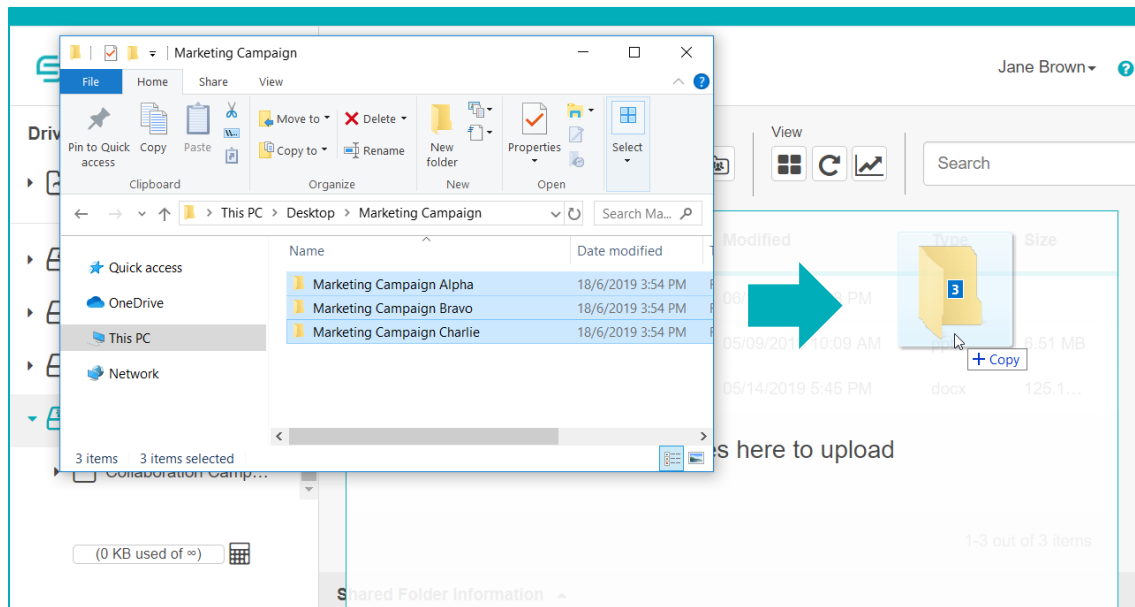
2. A file navigation window will appear. Select the file/folder(s) you wish to upload. You may select multiple file/folder(s) at a time.






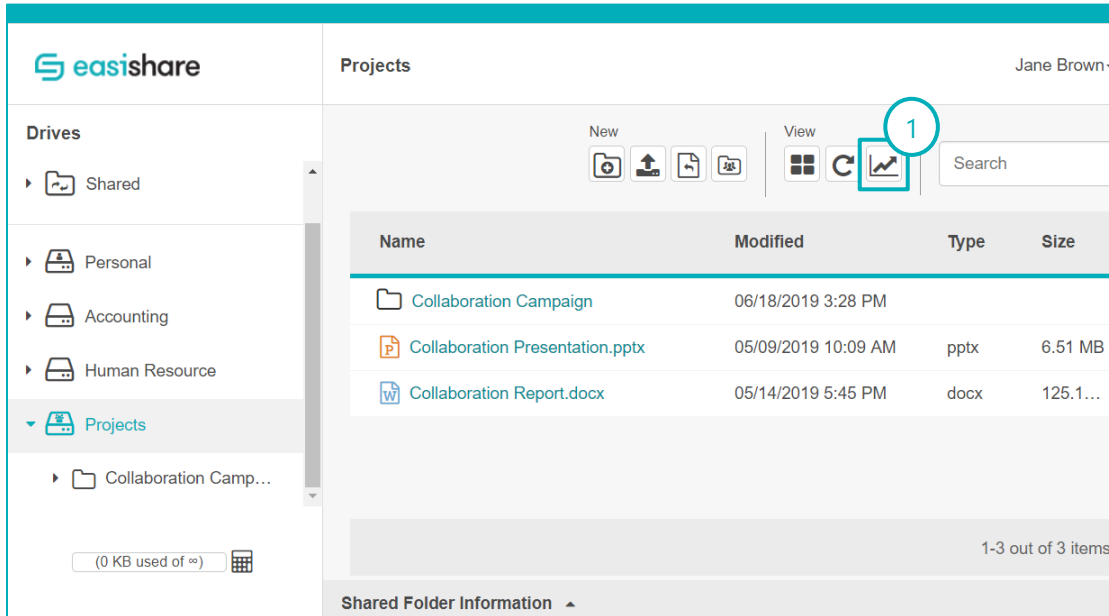
## 4.2 Using “Drag & Drop” Method

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

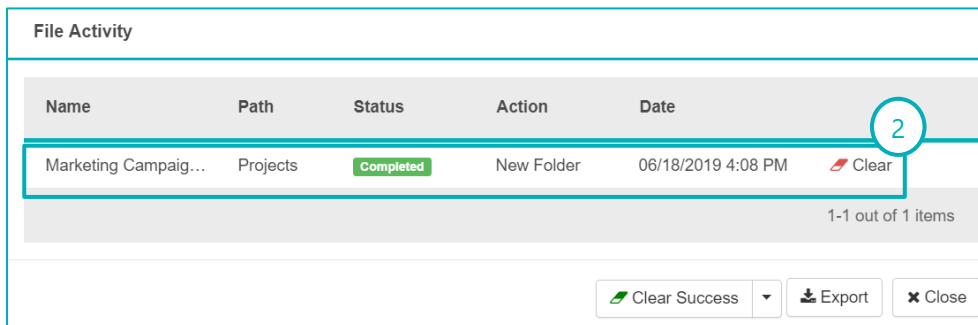


## 4.3 Check Upload Status

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's a sidebar with 'Drives' including Shared, Personal, Accounting, Human Resource, and Projects (selected). The main area is titled 'Projects' and shows a list of files and folders. A toolbar at the top right of the main area contains icons for New, View, and File Activity (circled with a blue '1'). The file list includes 'Collaboration Campaign', 'Collaboration Presentation.pptx', and 'Collaboration Report.docx'. At the bottom, it says '1-3 out of 3 items'.



The screenshot shows the 'File Activity' pop-up window. It has a table with columns: Name, Path, Status, Action, and Date. The first row shows 'Marketing Campaig...' with a 'Completed' status and a 'Clear' button (circled with a blue '2'). The bottom of the window has buttons for 'Clear Success', 'Export', and 'Close'.

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

**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>					
1-1 out of 1 items					
<div> Clear Success Export Close </div>					

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

Virus Detected

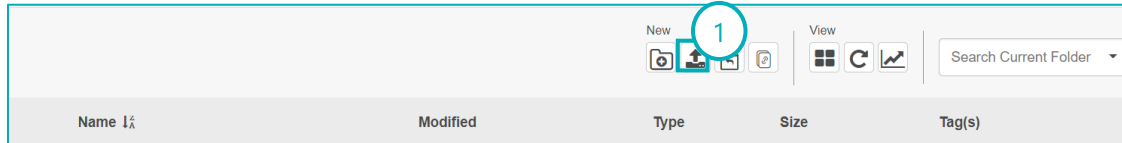
### Note:

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

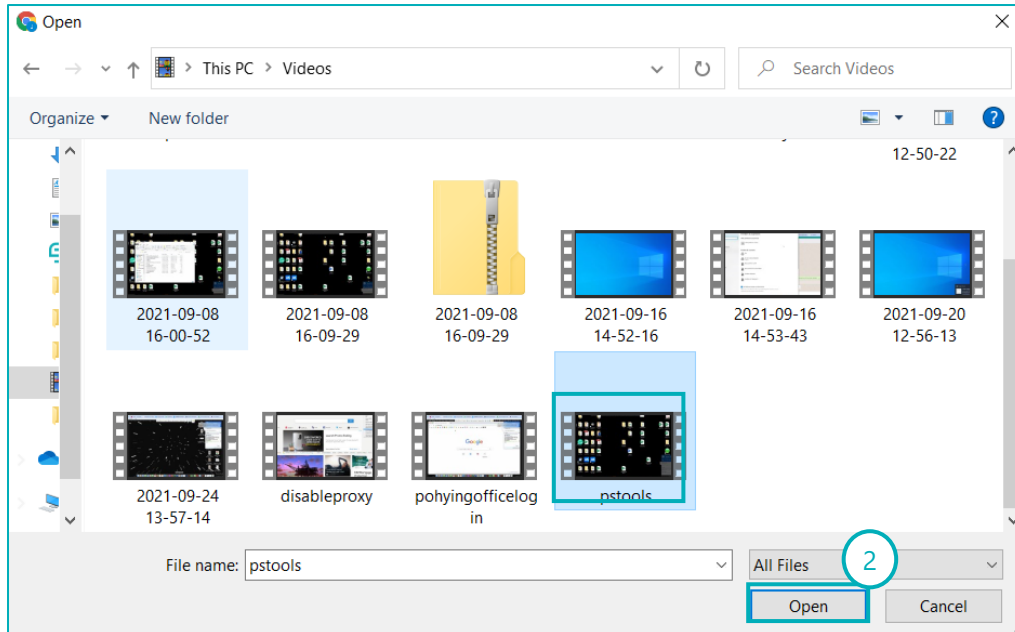
## 5 File Operations

### 5.1 Create a File

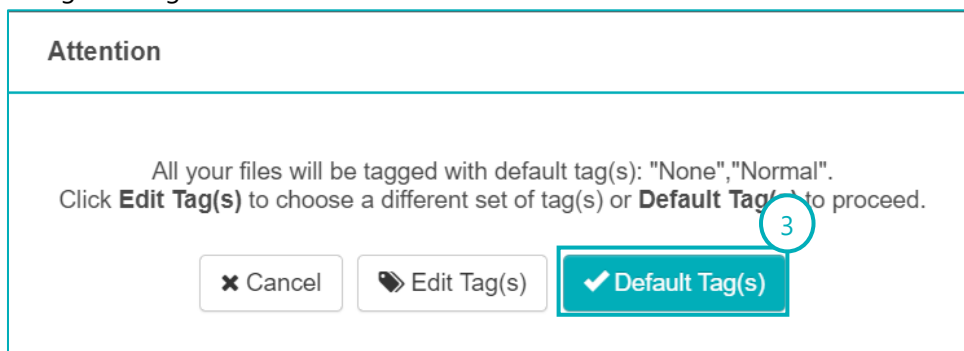
1. Click on the upload icon on the top right.



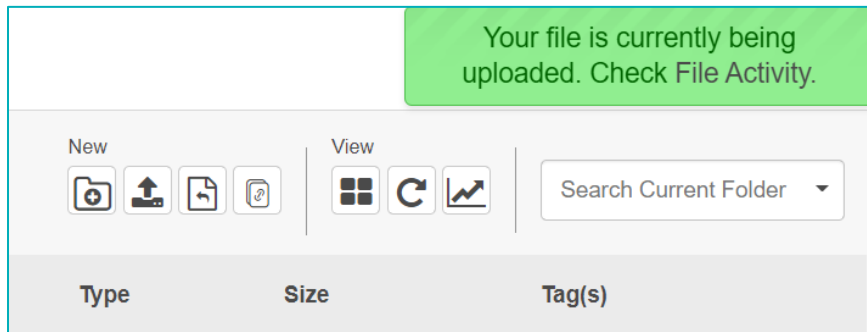
2. Select a file and click "open".



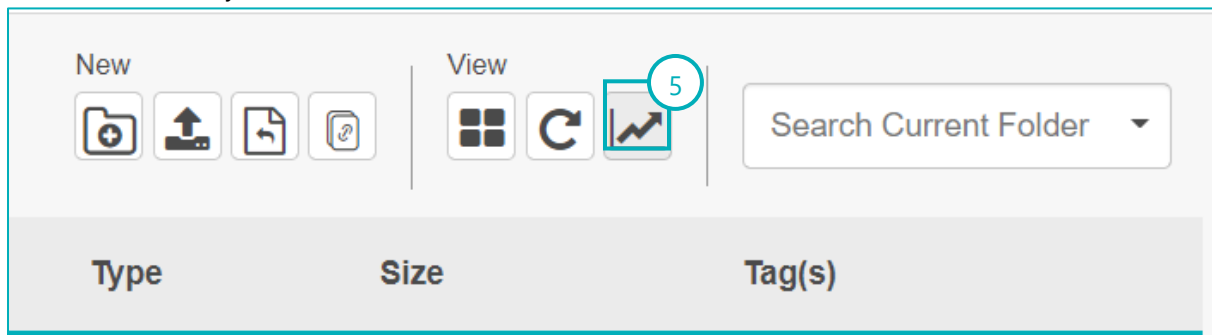
3. Press "Default Tags" when you see a pop up – "All your files will be tagged..." unless you wish to change the tag.



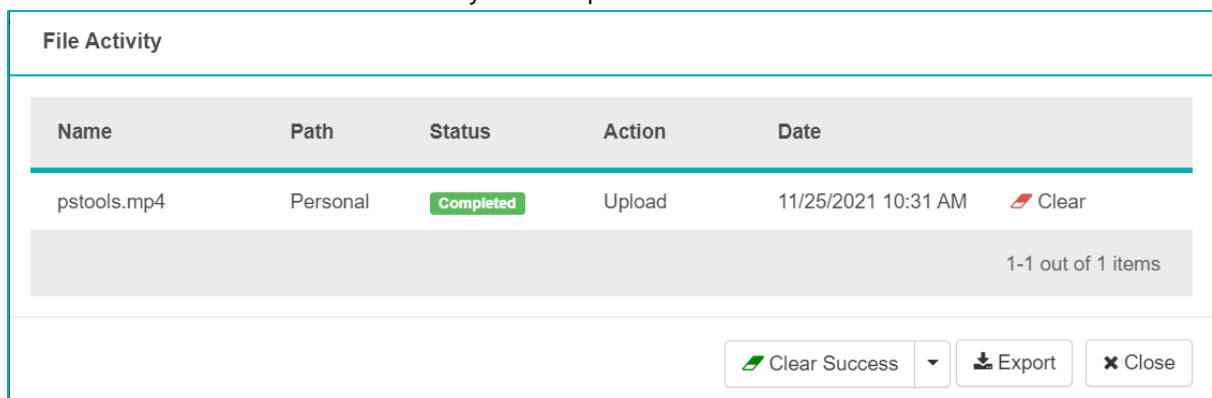
4. At the top right it should show "Your file is currenting being uploaded..."




- Click on File Activity.

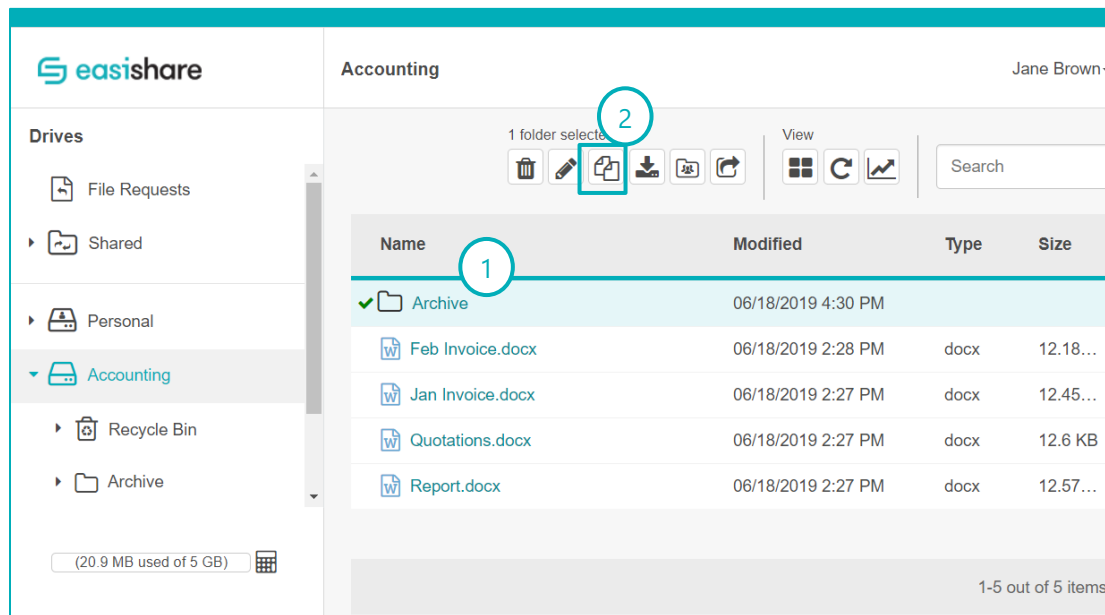


- You should be able to see the status of your file upload.

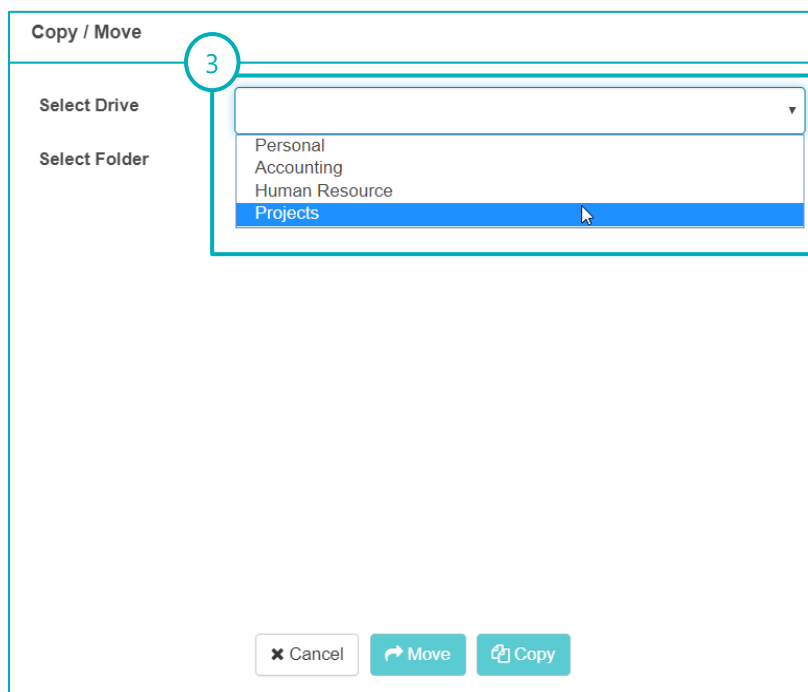


## 5.2 Copy/Move

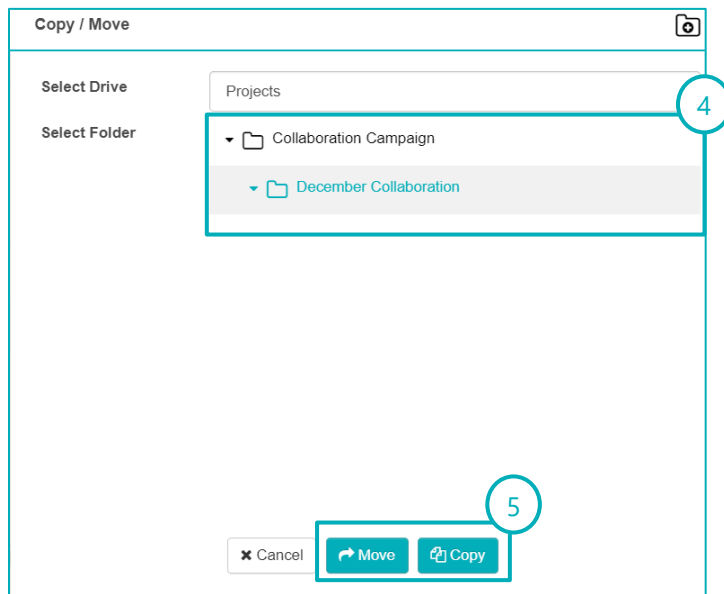
- Select the file/folder(s). To select, click on the white area beside the file/folder(s) name. You may select multiple file/folder(s) at a time.
- Click on **Move/Copy**  along the **Action Pane** located at the top.



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




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

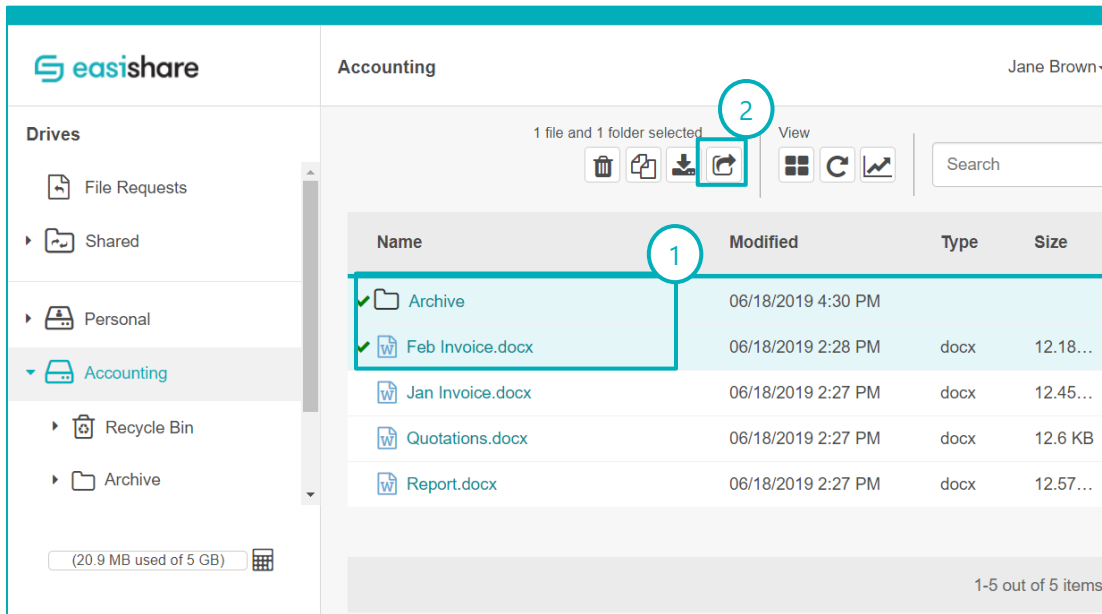


**Note:** Moving a file/folder that is shared may cause the link to break. Recipients may not be able to access such files/folders.



## 5.3 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', 'Accounting' (selected), 'Recycle Bin', and 'Archive'. The 'Accounting' drive is displayed in the main area, showing a list of files and folders. The 'Archive' folder and 'Feb Invoice.docx' file are selected, indicated by a blue highlight and a checkmark. A red box labeled '1' highlights the selection area. Above the file list, the 'Action Pane' contains icons for 'Delete', 'Copy', 'Download', and 'Share'. The 'Download' icon 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...

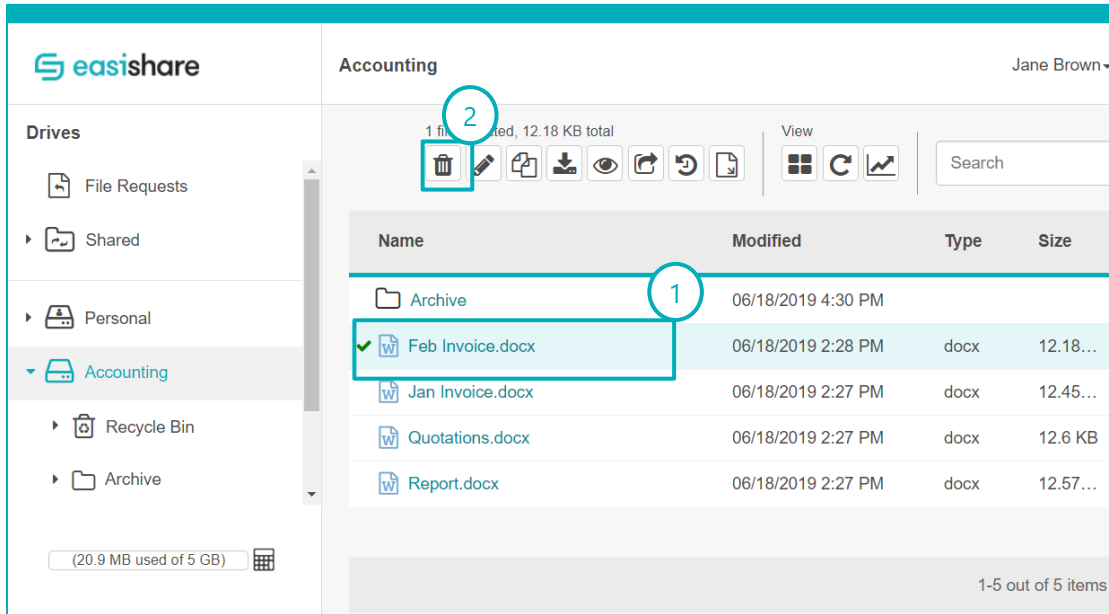
At the bottom of the interface, it shows '(20.9 MB used of 5 GB)' and '1-5 out of 5 items'.





## 5.4 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', and 'Accounting' (selected). Below 'Accounting' are 'Recycle Bin' and 'Archive'. A status bar at the bottom of the sidebar shows '(20.9 MB used of 5 GB)'. The main area displays the 'Accounting' drive contents. At the top, a summary bar indicates '1 file selected, 12.18 KB total'. Below this is an 'Action Pane' with icons for delete, edit, download, view, share, and refresh. The 'delete' icon is circled with a blue '2'. A table lists the files in the drive:

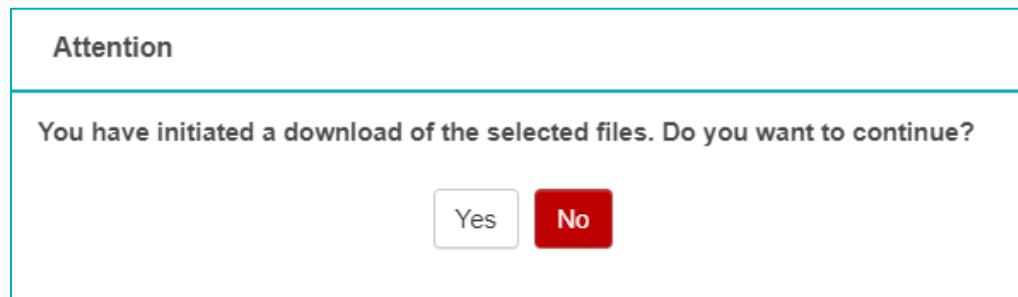
Name	Modified	Type	Size
Archive	06/18/2019 4:30 PM		
<input checked="" type="checkbox"/> Feb Invoice.docx	06/18/2019 2:28 PM	docx	12.18...
Jan Invoice.docx	06/18/2019 2:27 PM	docx	12.45...
Quotations.docx	06/18/2019 2:27 PM	docx	12.6 KB
Report.docx	06/18/2019 2:27 PM	docx	12.57...

The 'Feb Invoice.docx' row is highlighted with a blue box, and a blue circle with the number '1' is placed over the selection checkbox. At the bottom right of the table area, it says '1-5 out of 5 items'.

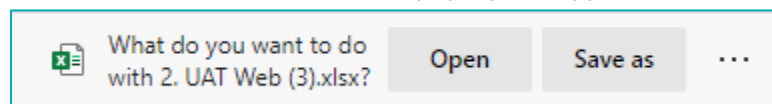
## 5.5 Recycle Bin



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'.



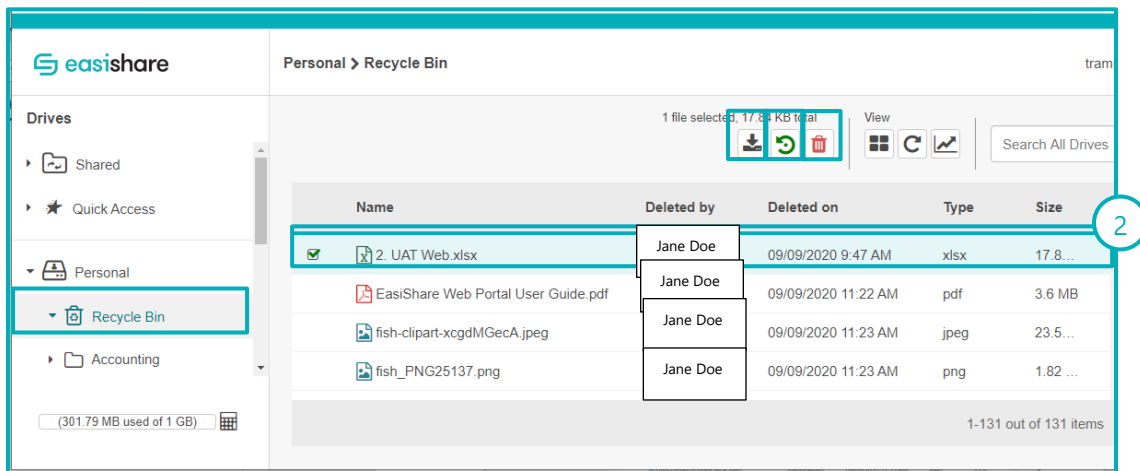
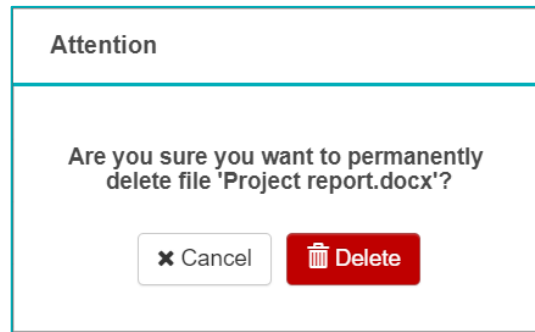
3. The file will be downloaded, and a pop-up will appear below the browser.




- 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.)**



## 5.6 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.



**Accounting** Jane Brown

1 file selected, 12.18 KB to

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

**Personal > Accounting**

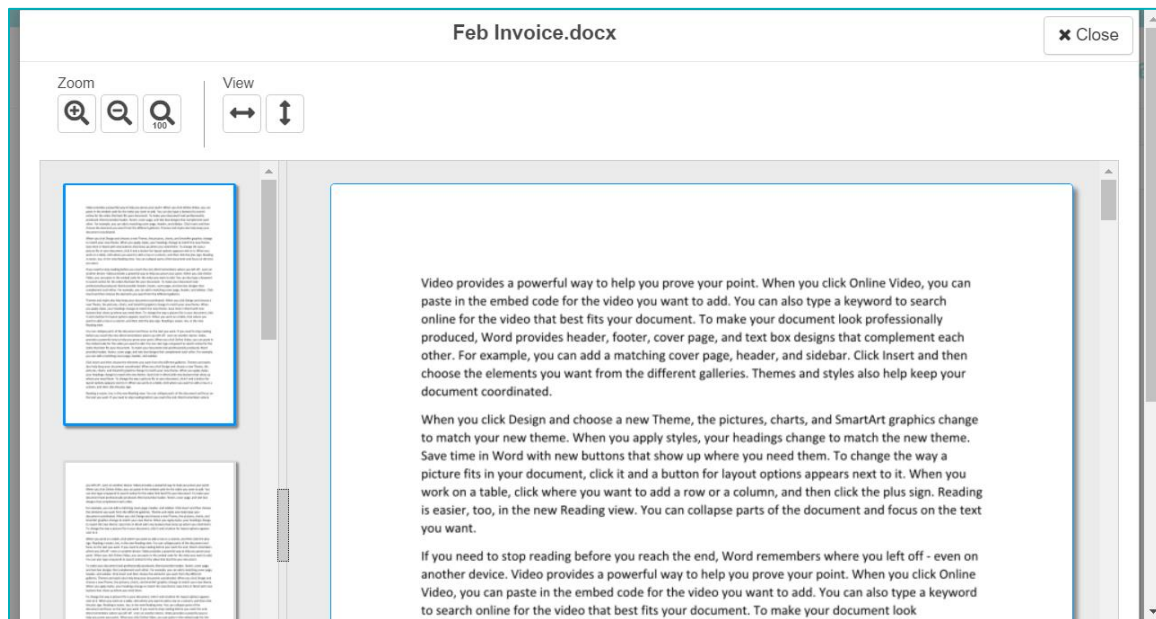
1 file selected, 4.6 MB total

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

(301.79 MB used of 1 GB)

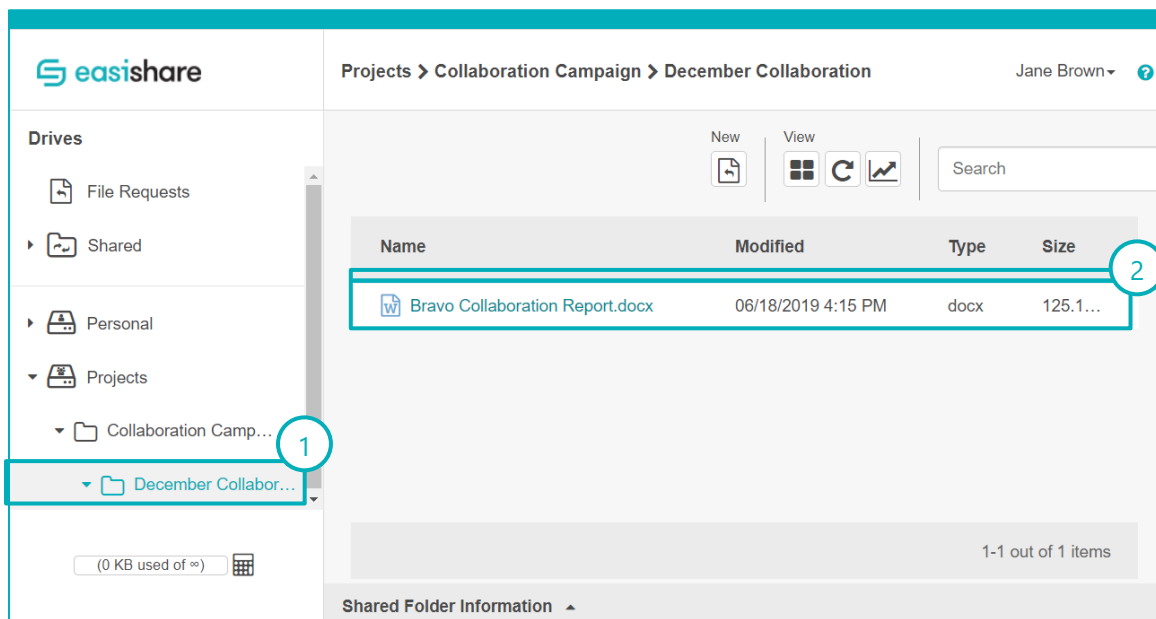
1-4 out of 4 items

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

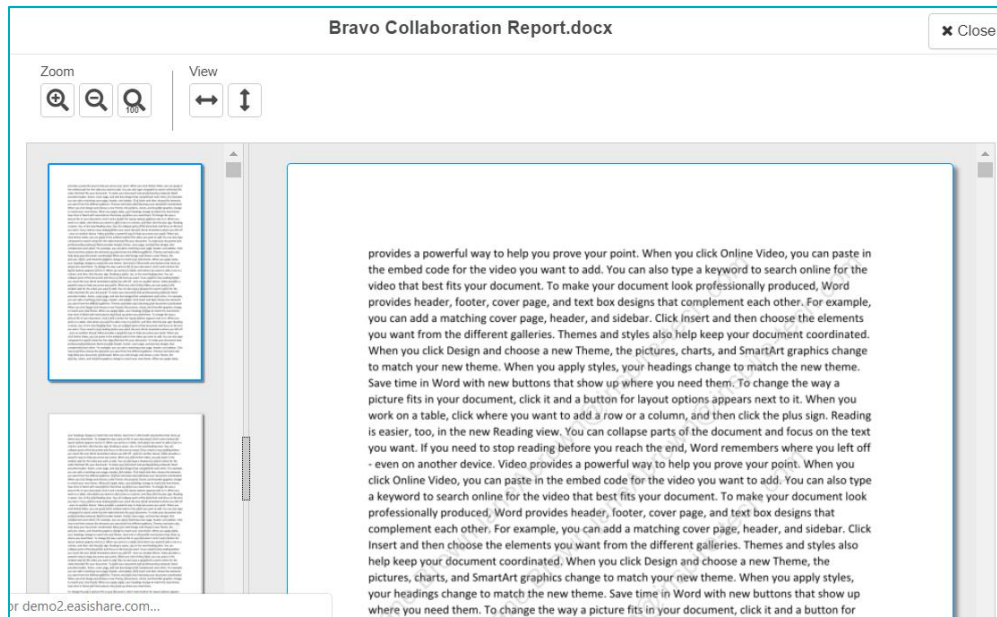


## 5.7 Preview a file with Viewer Permissions

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.

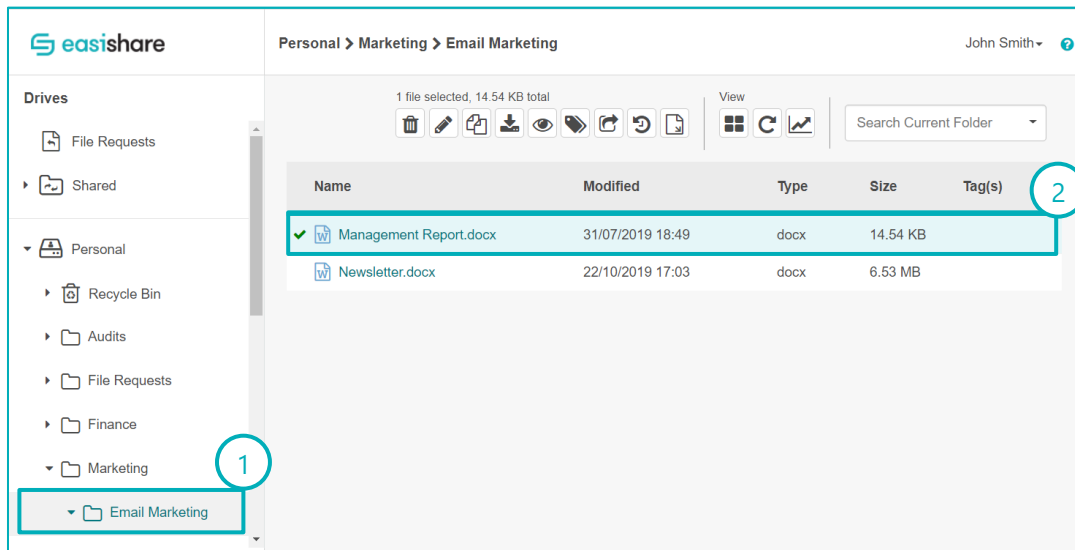



**Note:** Users with Viewer permissions previewing a file will have a watermark displaying the user's name and email address.

## 5.8 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

Diagram illustrating the Document Tag dialog box. A red circle labeled '4' highlights the Priority dropdown menu, and a red circle labeled '5' highlights the Year dropdown menu. A red box highlights the 'Apply to All' button.

Personal > Marketing > Email Marketing John Smith ?

New:    View:    Search Current Folder



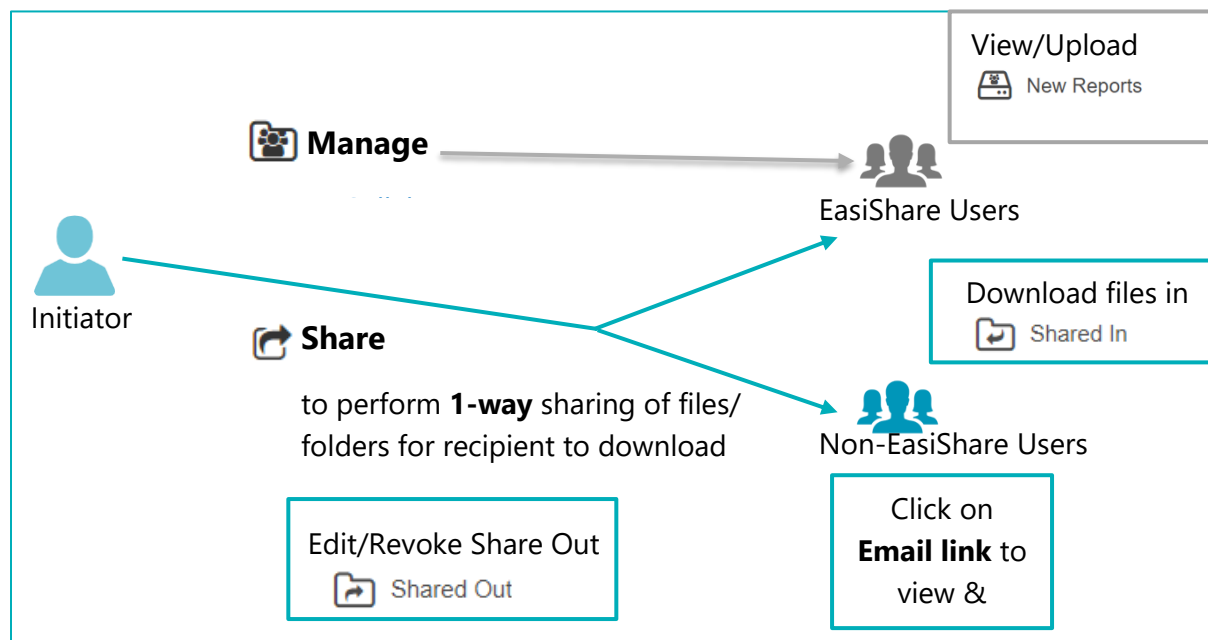
Name	Modified	Type	Size	Tag(s)
 Management Report.docx	31/07/2019 18:49	docx	14.54 KB	High,2019
 Newsletter.docx	22/10/2019 17:03	docx	6.53 MB	


Diagram illustrating the file listing interface. A red circle labeled '5' highlights the Tag(s) column header. A red box highlights the 'High,2019' tag for the 'Management Report.docx' file.



## 6 Share




### Scenarios & How to use the functions

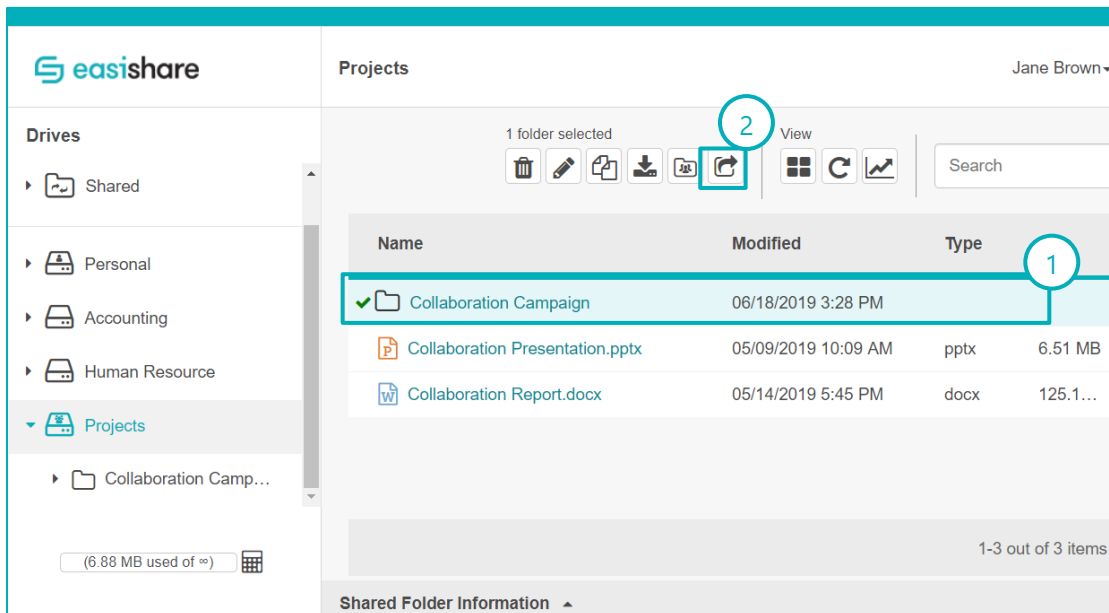
Scenarios	What do you (the initiator) do?	What do the recipient do?
<b>I want to send documents to my vendor to download.</b>	Select document & click on "Share"	Click on the link & download the file(s).
<b>I want to send a set of files to my vendor to download.</b>	Either <ol style="list-style-type: none"> <li>1) Put them in a folder, select the folder &amp; click on "Share"</li> <li>2) Multi-select the files &amp; click "Share"</li> </ol>	Click on the link from the email & download the files in a zipped folder.
<b>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.</b>	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.  <b>New Reports</b>

## 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 displays the EasiShare web portal interface. On the left, the 'Drives' sidebar shows a tree view with 'Shared', 'Personal', 'Accounting', 'Human Resource', and 'Projects' (selected). Under 'Projects', 'Collaboration Camp...' is listed. The main area shows the 'Projects' section for 'Jane Brown'. At the top, a toolbar indicates '1 folder selected' and includes icons for delete, edit, copy, download, share, and view. The 'Share' icon is highlighted with a red circle labeled '2'. Below the toolbar is a table with columns 'Name', 'Modified', and 'Type'. The first row, 'Collaboration Campaign', is highlighted with a red circle labeled '1'. Below the table, it shows '1-3 out of 3 items' and a 'Shared Folder Information' section.

Name	Modified	Type
✓ 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...



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 with the following elements and callouts:

- 3**: Points to the input fields for Name, Email, and Mobile Phone No.
- 4**: Points to the confirm icon (a person with a plus sign) next to the Mobile Phone No. field.
- 5**: Points to the 'Manage Recipients' dropdown menu.
- 6**: Points to the 'Import Recipient List' option in the dropdown.
- 7**: Points to the 'Export Recipient List' option in the dropdown.
- 8**: Points to the 'Create Group' option in the dropdown.
- 9**: Points to the settings section including Link Expires, OTP, Notifications, and No. of Attempts.
- 10**: Points to the checkbox for 'Share with View Only'.
- 11**: Points to the 'Share' button.

The form includes a warning: "WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By clicking the checkbox, you agree to our Terms and Conditions."



### 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.
<div><div>pr</div><div> Projects Team</div></div>		
	Email	Mobile Phone No.




Message



**Share**

Please enter the recipient username / name to share

Manage Recipients ▾

Name	Email	Mobile Phone No.
 Projects Team	<a href="#">show members</a>	
<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	
Name	Email	Mobile Phone No.	

Message



Link Expires

☐

OTP

☒

Notifications

☒ ☒ Per Download ☐ Summary

No. of Attempts

2

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

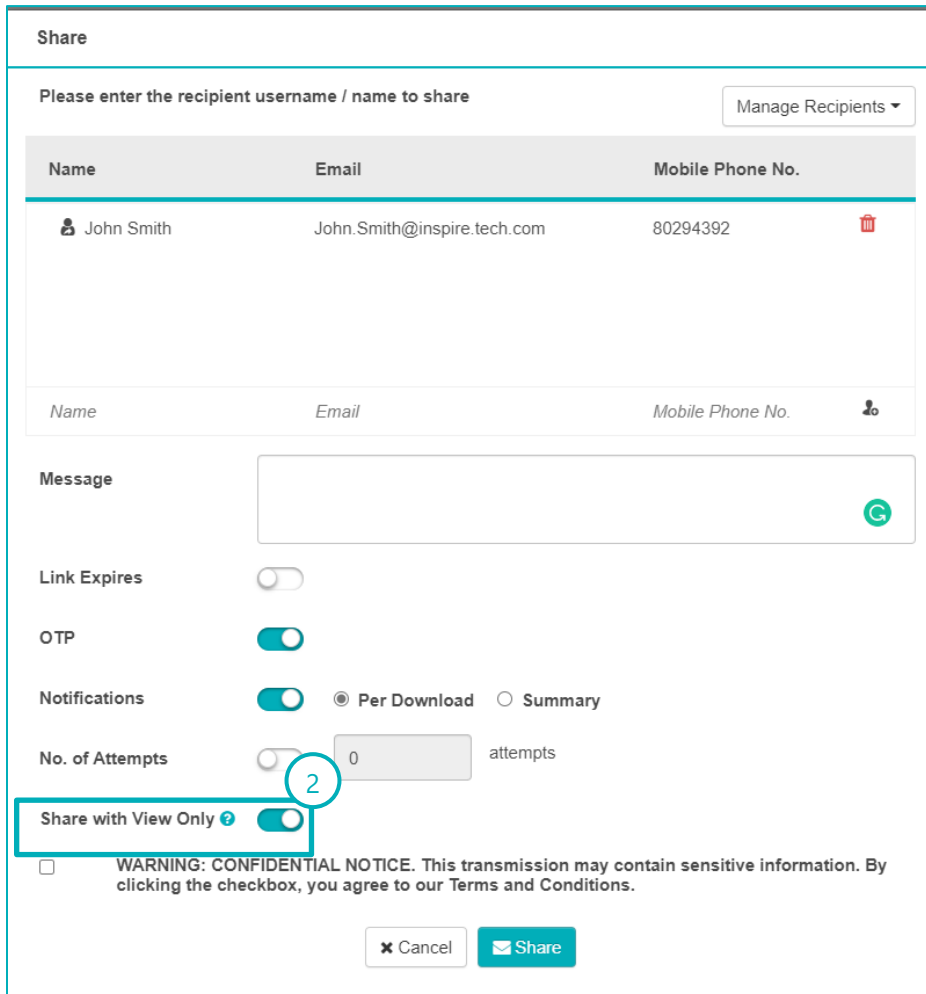
Share

### Note:

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**.



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.
- Table of recipients:
 

Name	Email	Mobile Phone No.
John Smith	John.Smith@inspire.tech.com	80294392
- Form fields: "Name", "Email", "Mobile Phone No.", and a "Message" text area with a green circular icon.
- Settings:
  - Link Expires: ☐
  - OTP: ☒
  - Notifications: ☒ Per Download ☐ Summary
  - No. of Attempts: ☐ 0 attempts
  - Share with View Only**: ☒ (highlighted with a red box and a red circle with the number 2)
- Warning: ☐ 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. 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 
Name	Email	Mobile Phone No. 


Message

2

3

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

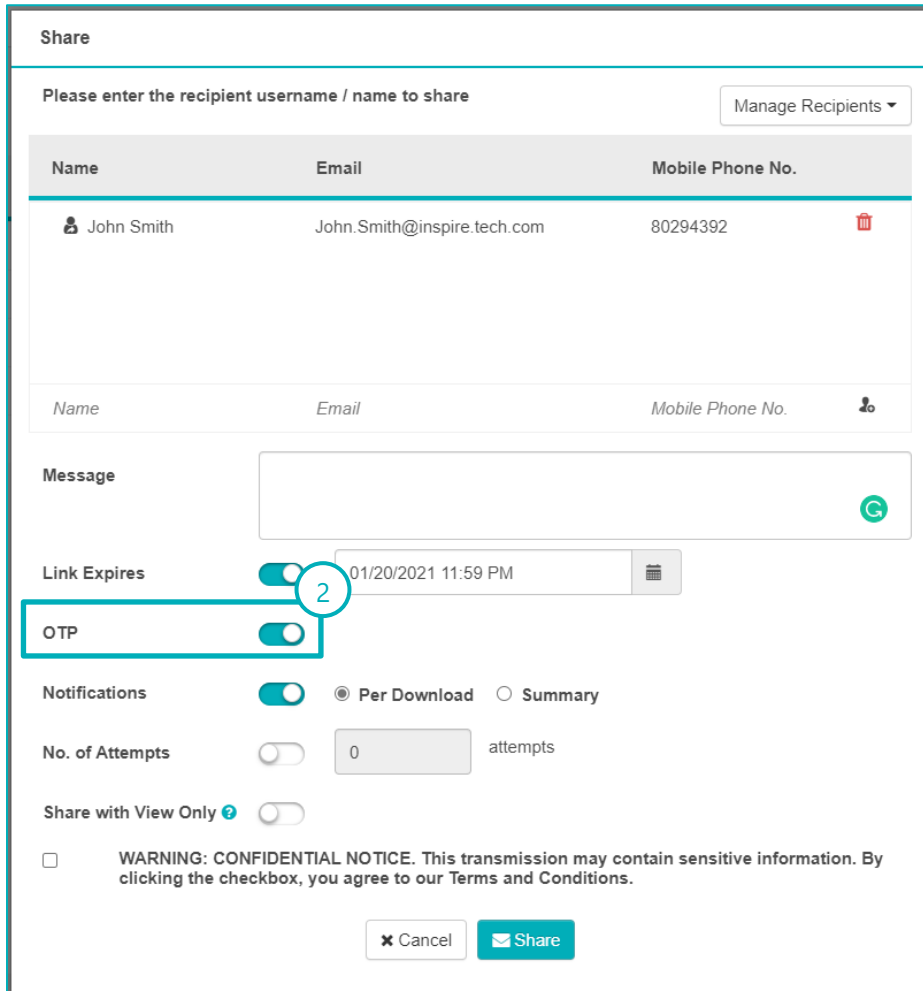
#### Note:

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**.






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  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. 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)

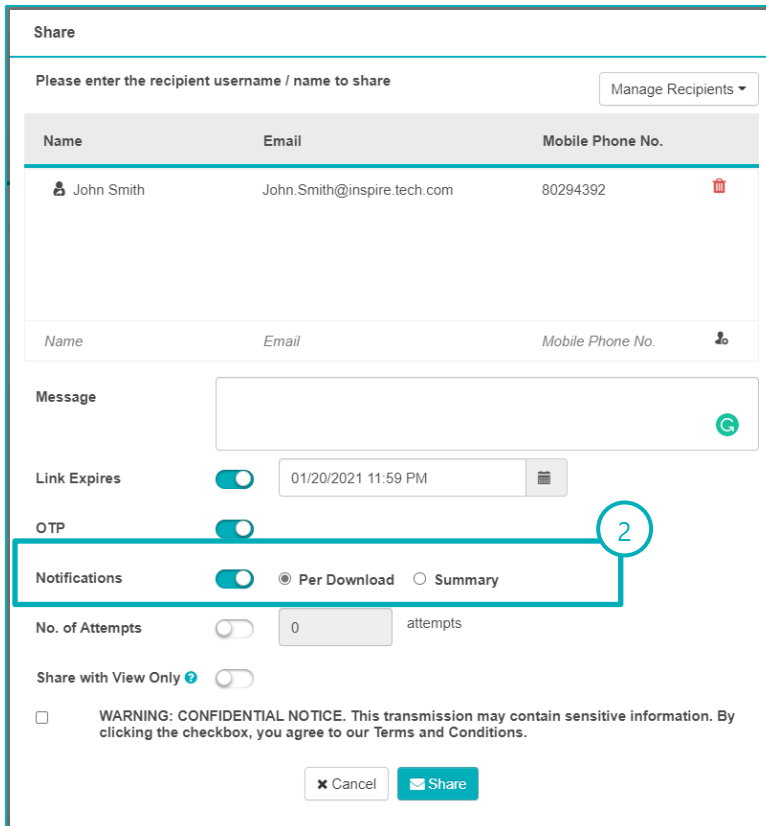
Enabling download notification allows user to know immediately when the recipient has downloaded/viewed the file. If this option is turned on and the recipient download/view the file more than once, user will also receive the same number of notifications.

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.



The screenshot shows the 'Share' form in the EasiShare web portal. The form includes a recipient selection table, a message field, and various sharing options. The 'Notifications' section is highlighted with a red box, and a red circle with the number 2 points to the 'Per Download' radio button.

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

Message:

Link Expires: ☒ 01/20/2021 11:59 PM

OTP: ☒

Notifications: ☒ ☒ Per Download ☐ Summary

No. of Attempts:  attempts

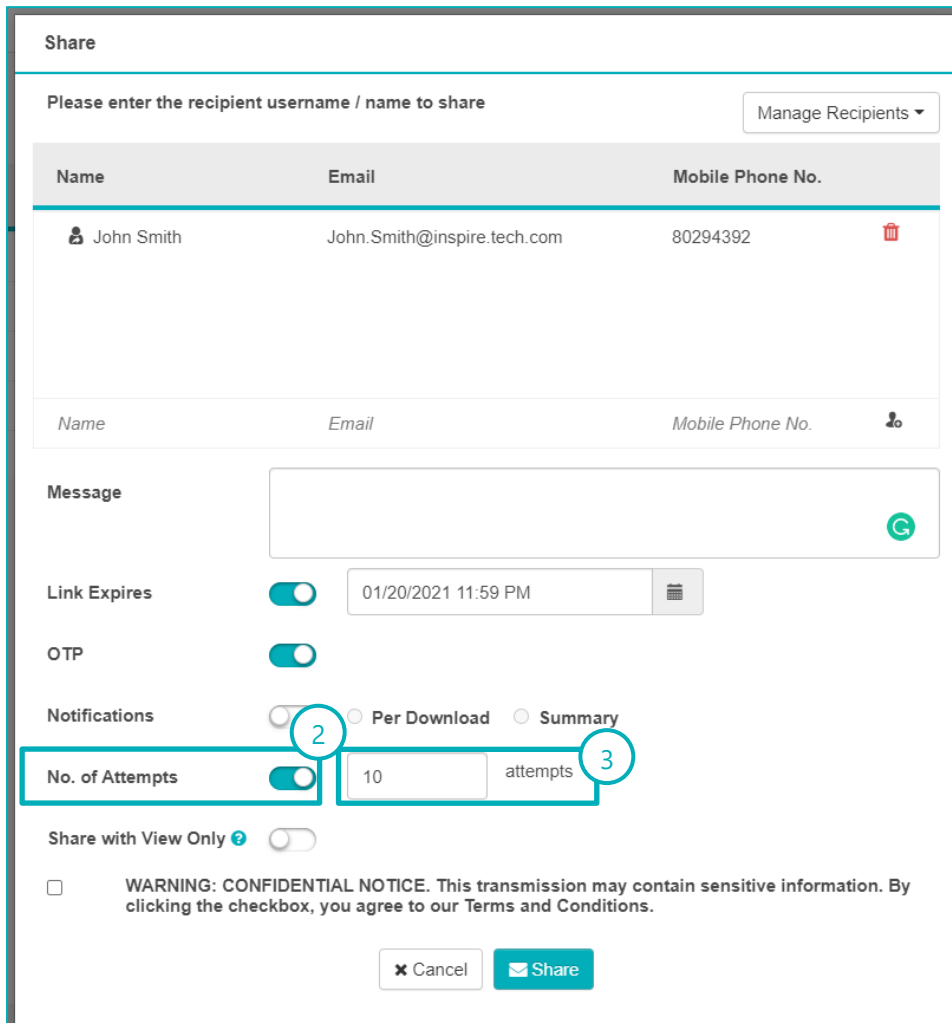
Share with View Only: ☐

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

### 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



The screenshot displays the 'Share' interface in the EasiShare web portal. At the top, there is a header 'Share' and a prompt 'Please enter the recipient username / name to share' with a 'Manage Recipients' button. Below this is a table with columns 'Name', 'Email', and 'Mobile Phone No.'. A single recipient, John Smith, is listed with email John.Smith@inspire.tech.com and mobile number 80294392. Below the table is a 'Message' input field with a green circular icon. Further down are settings for 'Link Expires' (01/20/2021 11:59 PM), 'OTP' (enabled), and 'Notifications' (Per Download selected). The 'No. of Attempts' setting is highlighted with a red box and a red circle '2', showing a toggle switch turned on and a value of '10' in a text box, with the word 'attempts' next to it. A red circle '3' highlights the 'attempts' text. Below this is a 'Share with View Only' toggle switch. At the bottom, there is a warning checkbox and a 'WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By clicking the checkbox, you agree to our Terms and Conditions.' message. The interface concludes with 'Cancel' and 'Share' buttons.

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

Message

Link Expires: 01/20/2021 11:59 PM

OTP: ☒

Notifications: ☒ Per Download ☐ Summary

No. of Attempts: ☒ 10 attempts

Share with View Only: ☐

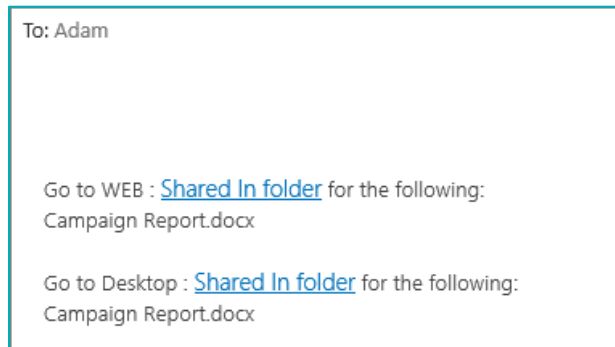
☐ WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By clicking the checkbox, you agree to our Terms and Conditions.



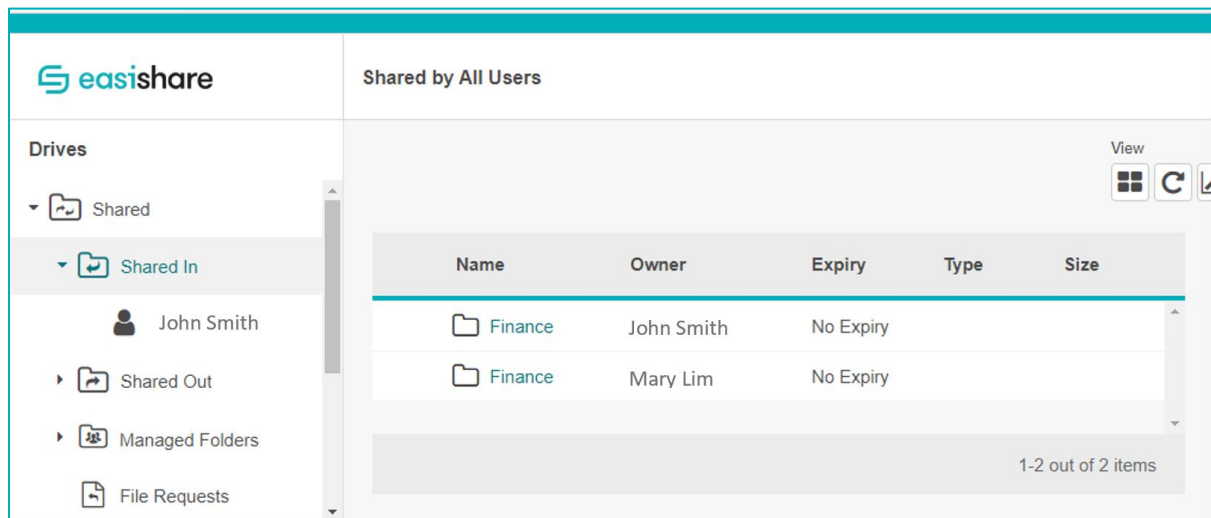
## 6.2 Access Shared Files/Folders

### 6.2.1 Email Notifications

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

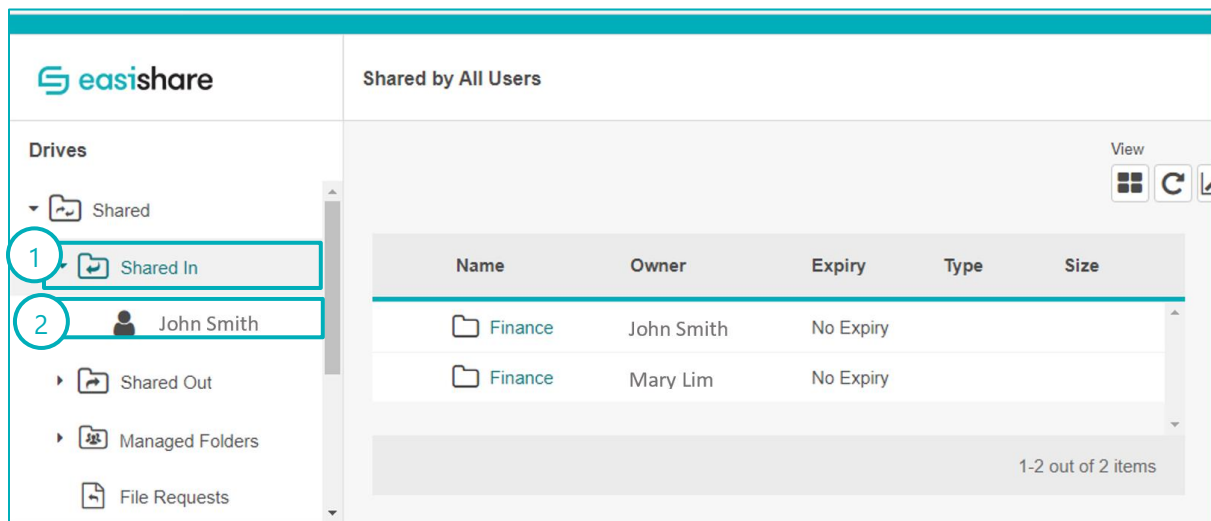


**Note:** For external recipients, they will only be able to view or download the specific file(s) or folder(s) that you have shared.



### 6.2.2 Shared In

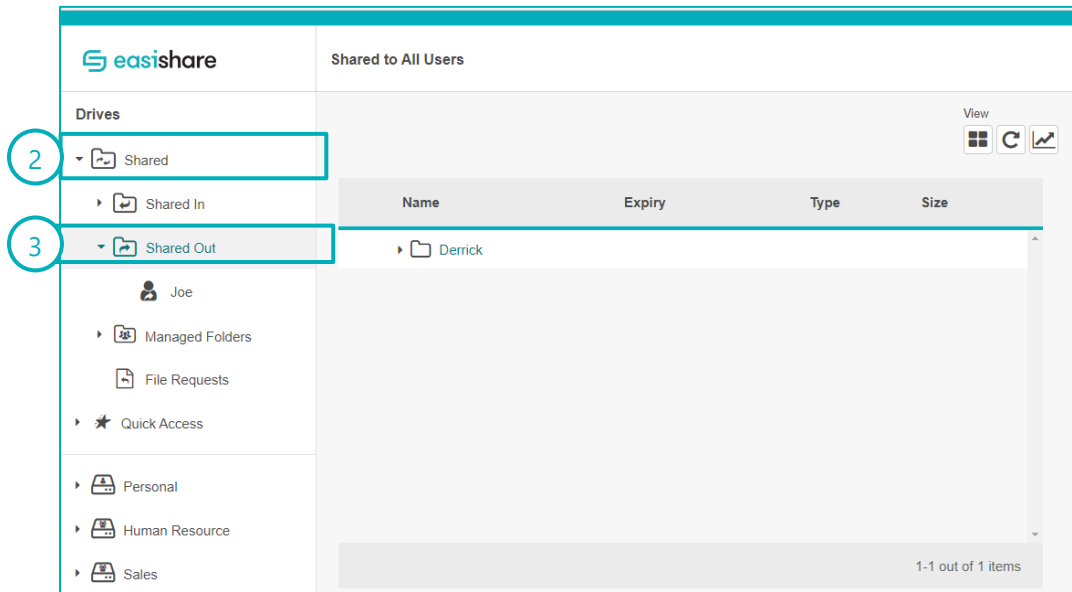
1. To access file/folder(s) shared by internal user.
2. Click on **Shared** located along the left panel.
3. Click on **Shared In**.



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

### 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**.




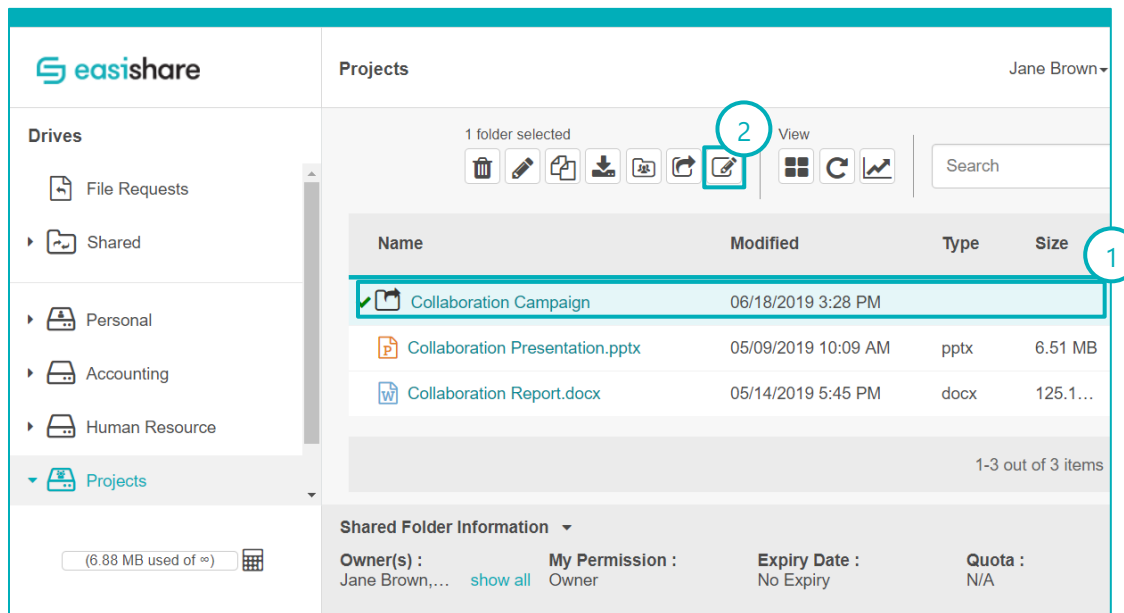
**Note:** External users refer to users who do not have a registered account in EasiShare.

## 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

View

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...

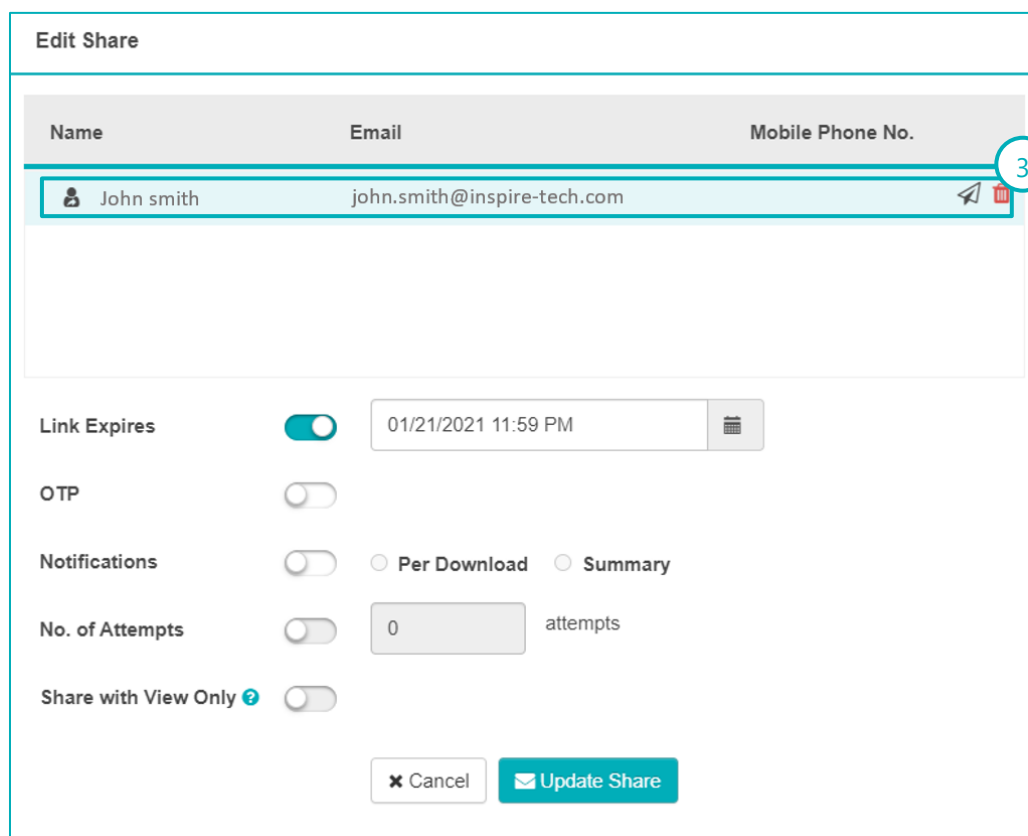
1-3 out of 3 items

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

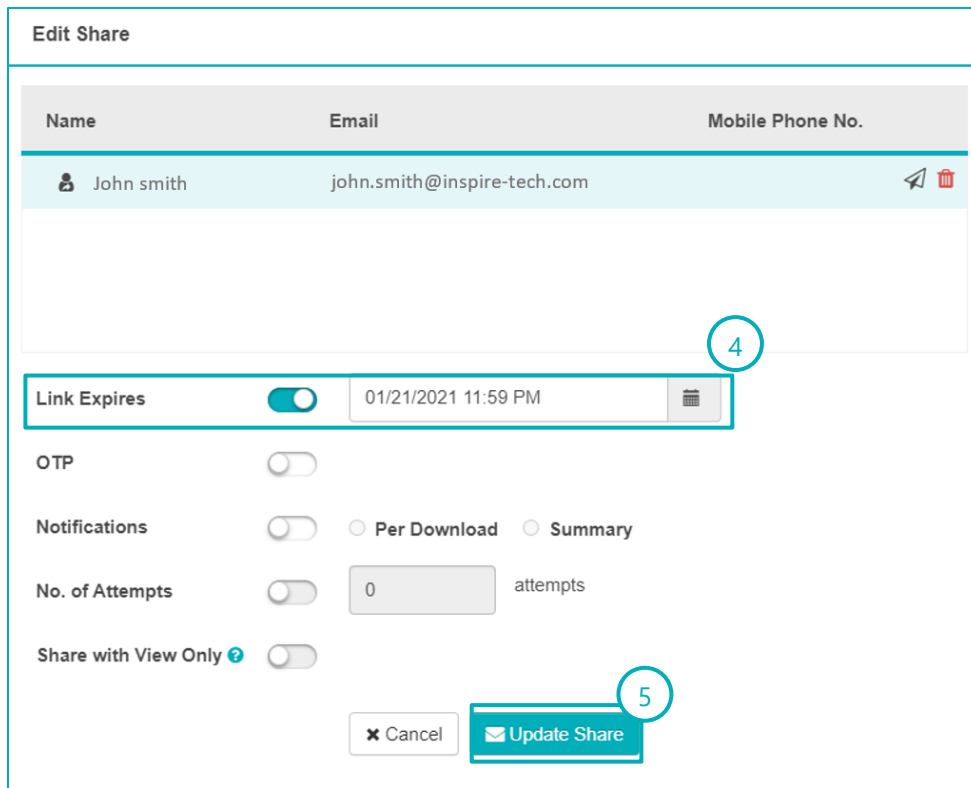
OTP ☐

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 

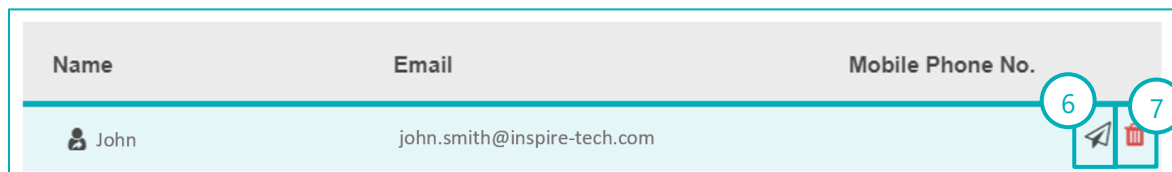
**OTP** ☐




**Notifications** ☐ ☐ Per Download ☐ Summary

**No. of Attempts** ☐ 0 attempts

**Share with View Only**  ☐

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	 

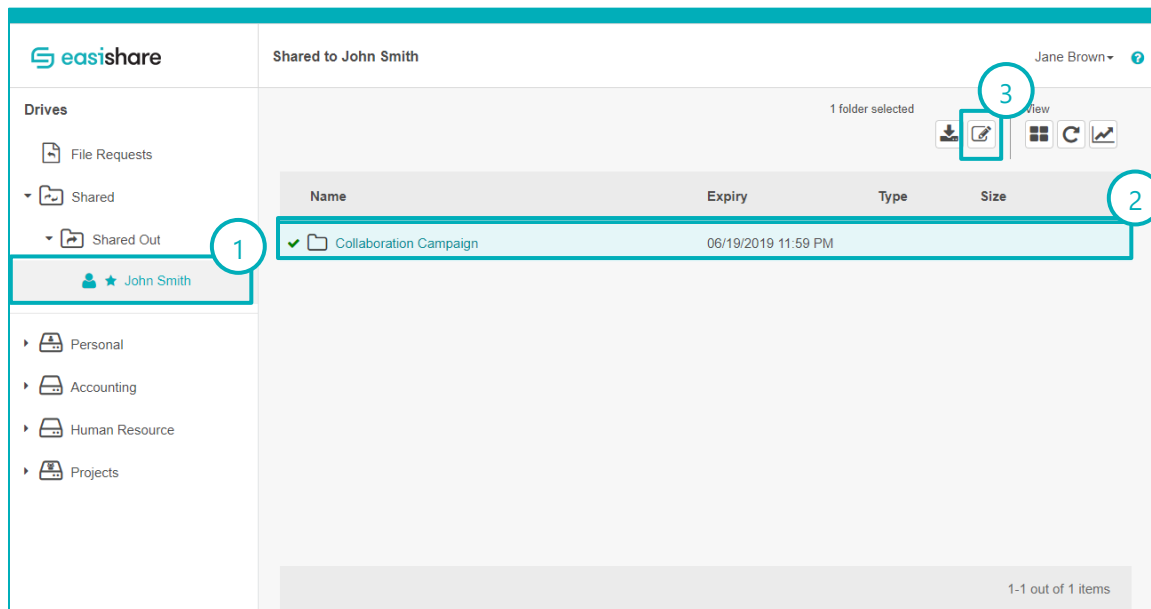


**Note:**

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.



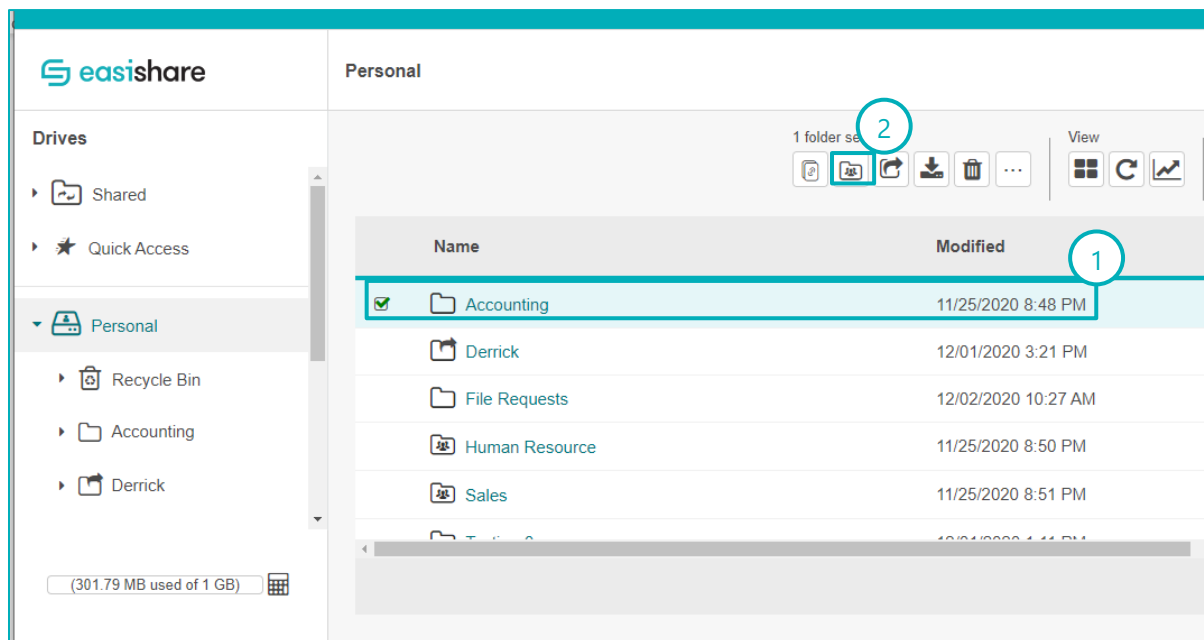




## 7 Manage Folder to Collaborate with Internal Users

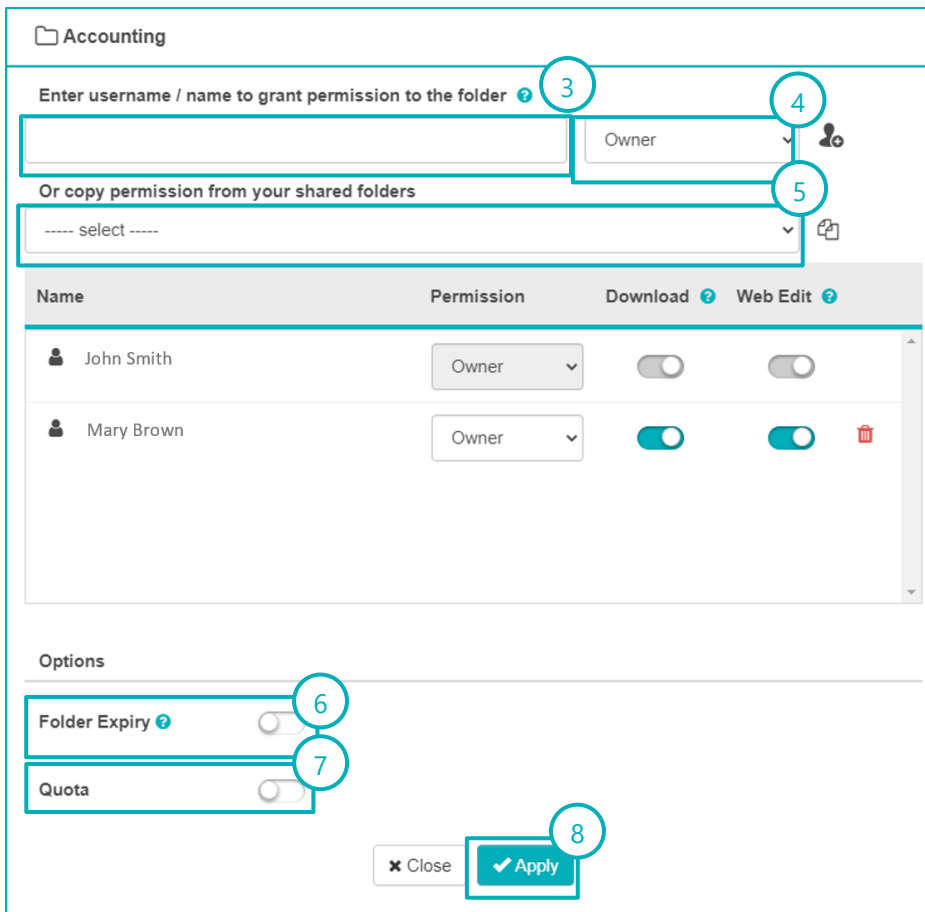
**Note:** Internal users refer to users who have a registered account in EasiShare.

### 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

---- select ---- 5 

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

Options

Folder Expiry ? 6 ☐

Quota 7 ☐

✕ Close ✓ Apply 8




**Note:**

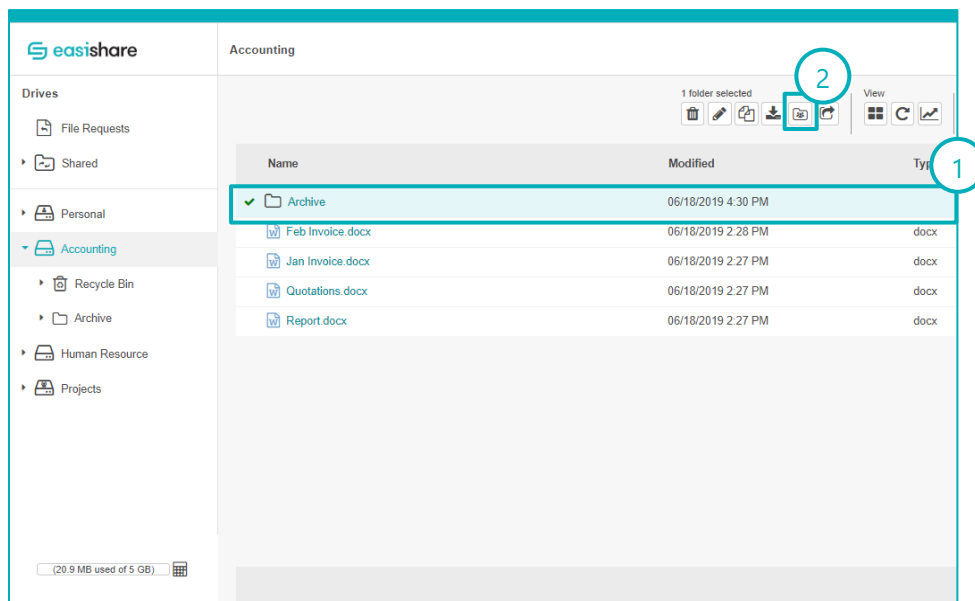
1. If the folder expiry is enabled and auto-delete is selected, after the folder expires and a pre-defined number of days set by your central administrator, the folder will be automatically purged by the system.
2. Some features may be controlled by your central administration system. If you are unable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

## 7.2 Collaboration Permission Types

Permission Type	Description
<b>Reader</b>	Permission to read files
<b>Contributor</b>	Permission to read, download, add and edit files
<b>Author</b>	Permission to read, download, add, edit and delete files
<b>Owner</b>	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.

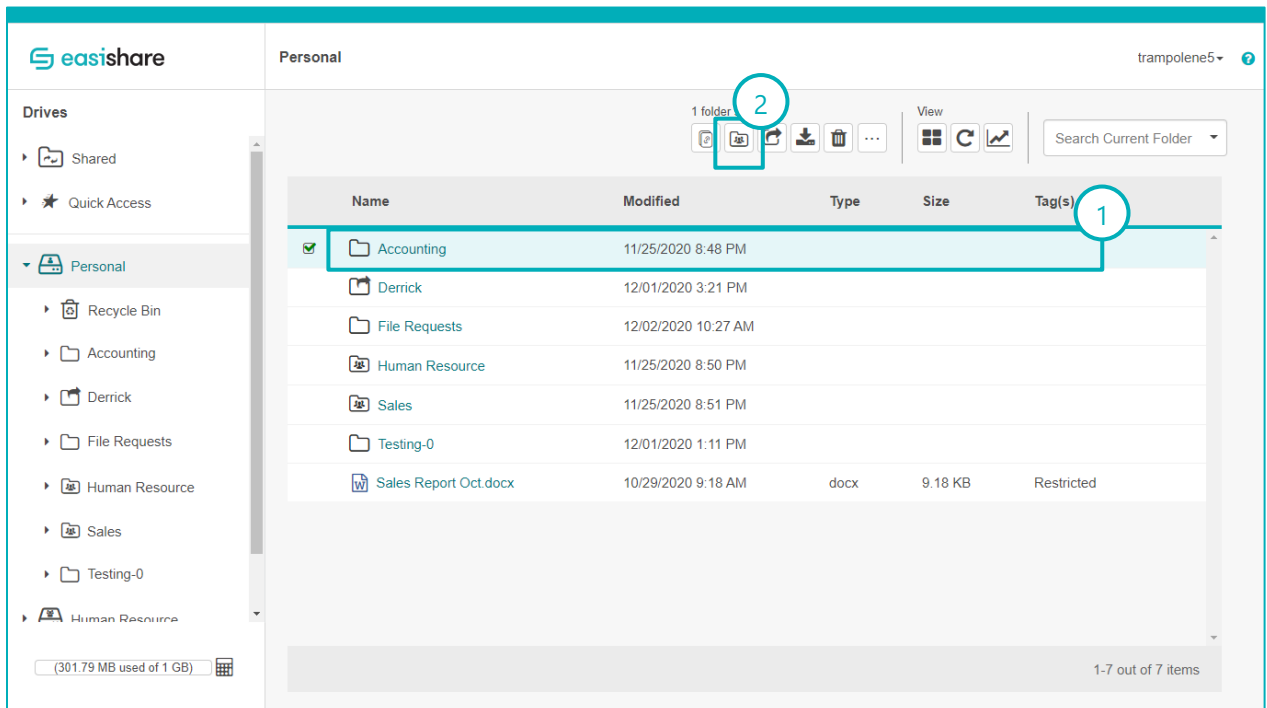


3. Add more users to collaborate with by entering the recipient's name and assigning the permission type.

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.



The screenshot shows the EasiShare web portal interface. On the left, the 'Drives' sidebar is visible, with 'Personal' selected. The main area displays a list of folders and files under the 'Personal' drive. The 'Accounting' folder is selected, and the 'Manage' button (represented by a group of people icon) is highlighted in the top action pane. A table lists the contents of the 'Accounting' folder.

Name	Modified	Type	Size	Tag(s)
Accounting	11/25/2020 8:48 PM			
Derrick	12/01/2020 3:21 PM			
File Requests	12/02/2020 10:27 AM			
Human Resource	11/25/2020 8:50 PM			
Sales	11/25/2020 8:51 PM			
Testing-0	12/01/2020 1:11 PM			
Sales Report Oct.docx	10/29/2020 9:18 AM	docx	9.18 KB	Restricted

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

Accounting

Enter username / name to grant permission to the folder ?

Project Team

Owner

Or copy permission from your shared folders

----- select -----

Name	Permission	Download ?	Web Edit ?
Jane Doe	Owner	<input type="checkbox"/>	<input type="checkbox"/>

- For existing users, you may wish to change the permission assigned by selecting a different permission type.
- Enable/disable folder expiry or quota as it ought.
- Click **Apply**.

Name	Permission	Download ?	Web Edit ?
Jane Doe	Owner	<input type="checkbox"/>	<input type="checkbox"/>
<div><div>Projects Team</div><div>show members</div></div>	<div>Owner</div> <div>Owner</div> <div>Author</div> <div>Contributor</div> <div>Reader</div>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Options

Folder Expiry ?

☐

Quota

☐

Close

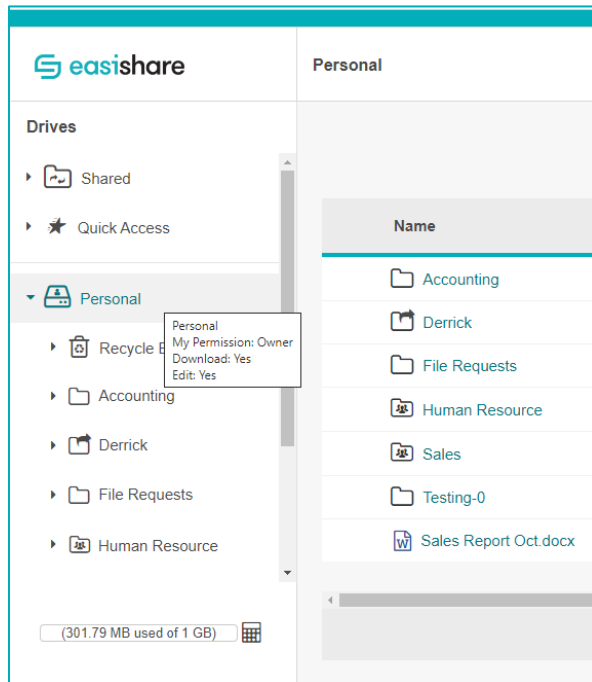
Apply




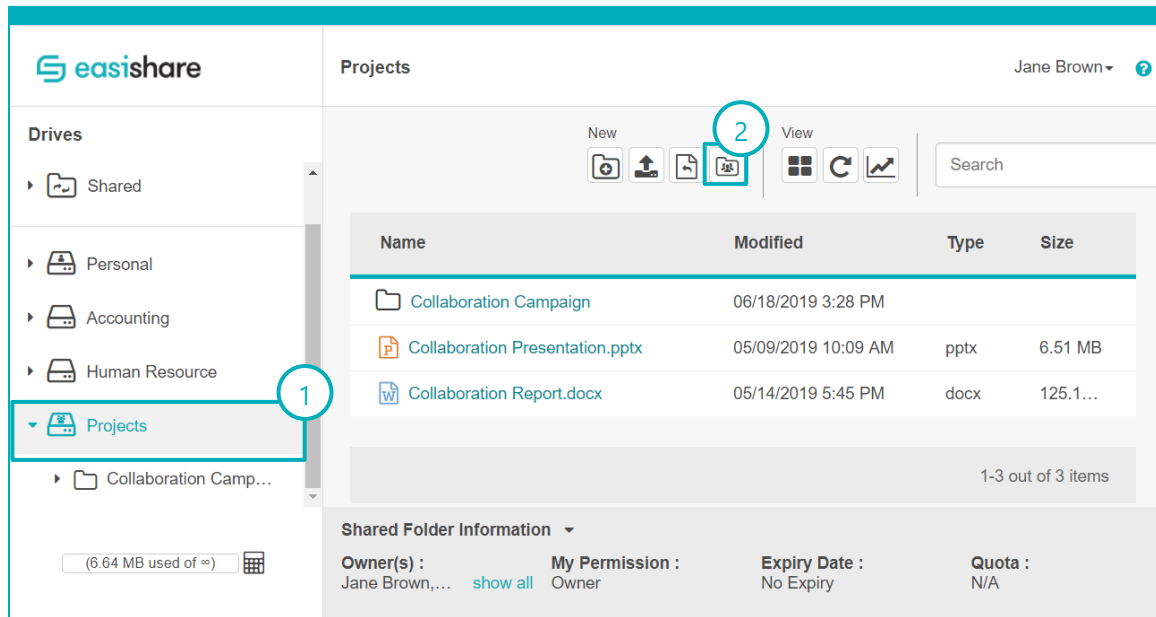
## 7.5 Manage Drive Permission

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.



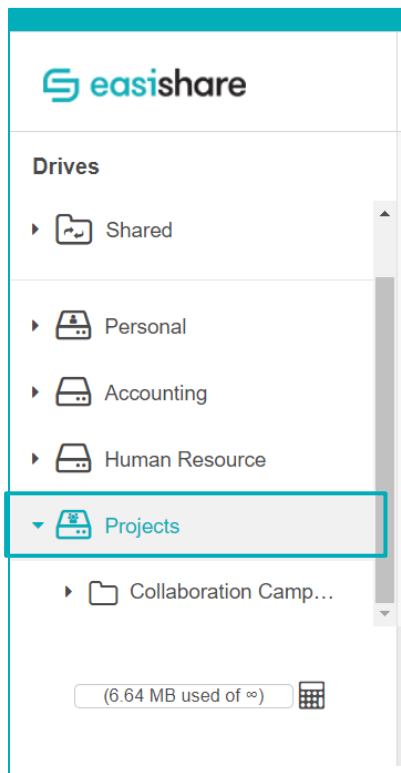
1. Navigate to the folder shared by internal users.
2. Click on **Manage**  along the **Action Pane** located at the top.



## 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

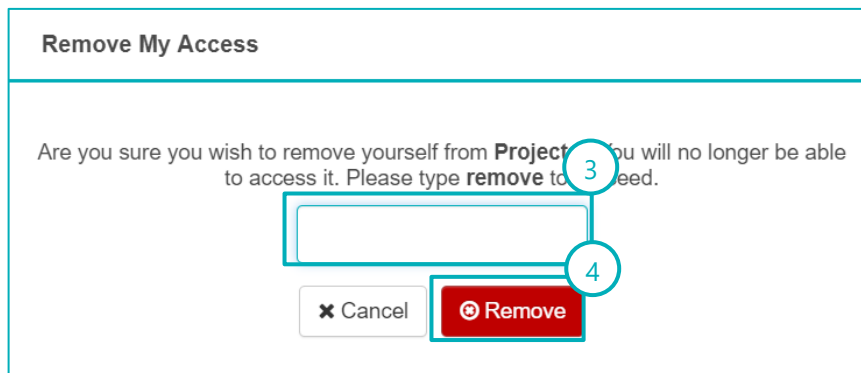
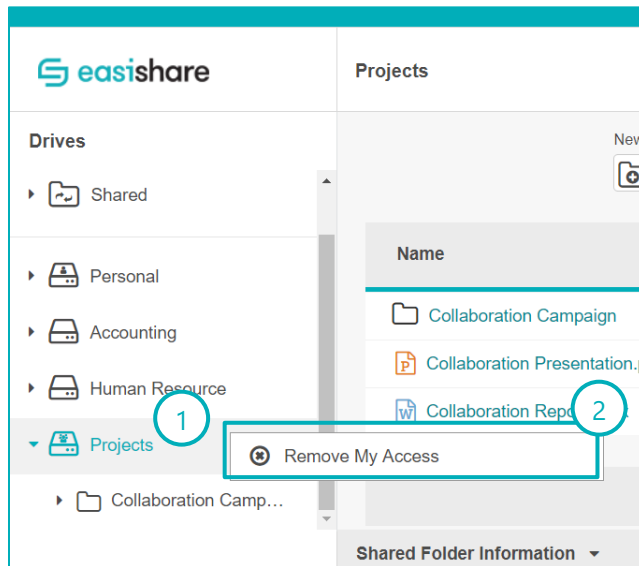
Heading	Description
<b>Owner(s)</b>	The list of owners of the shared drive
<b>My Permission</b>	User permission for the drive. Please refer to 7.2 for the list of permission types
<b>Expiry Date</b>	The expiry date of the shared drive
<b>Quota</b>	The drive space of the shared drive



## 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.

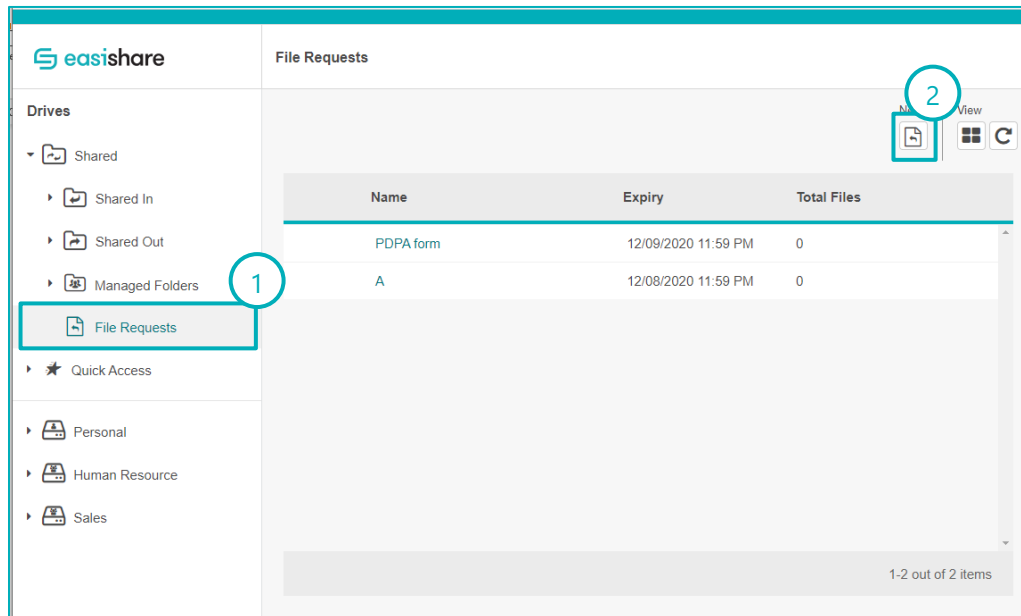
1. Right click the Shared Drive that you wish to remove.
2. Click on **Remove My Access**.
3. Type **remove**.
4. Click **Remove**.




## 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.

### New File Request

Enter the title of your file request...

Manage Recipients

Import Recipient List

Export Recipient List

Create Group

Name	Email	Mobile Phone No.

Name

Email

Mobile Phone No.

Options

Advanced Options

Message

Link Expires

OTP

Notifications

Per Upload

Summary

Cancel

Send Request

Options

Advanced Options

No. of attempts

0

attempts

File size limit

0

MB

GB

File type restrictions

Allow all except

Block all except

Cancel

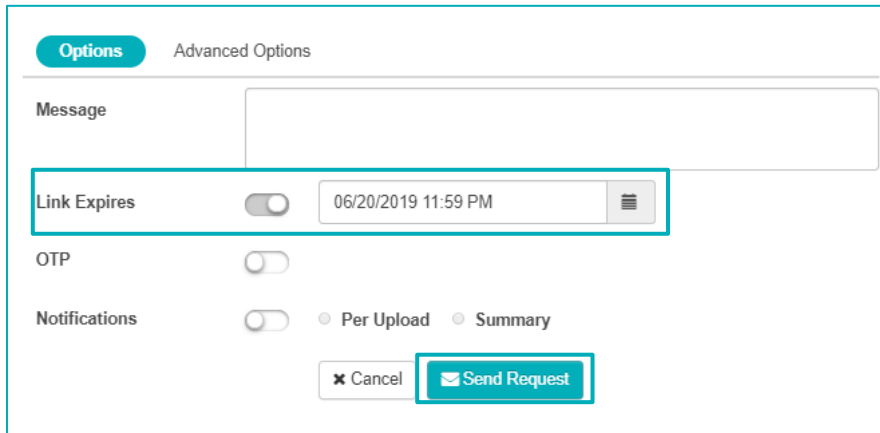
Send Request

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.



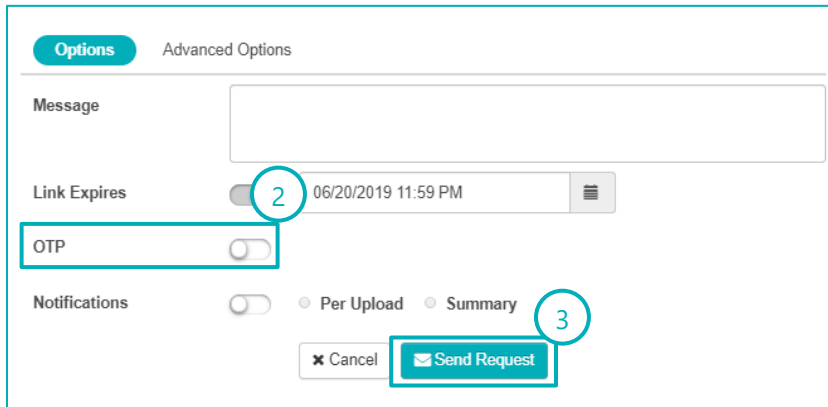
The screenshot shows the 'Advanced Options' section of a file request form. It includes a 'Message' text area, a 'Link Expires' section with a toggle switch and a date/time picker set to '06/20/2019 11:59 PM', an 'OTP' toggle switch, and 'Notifications' with radio buttons for 'Per Upload' and 'Summary'.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

**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.



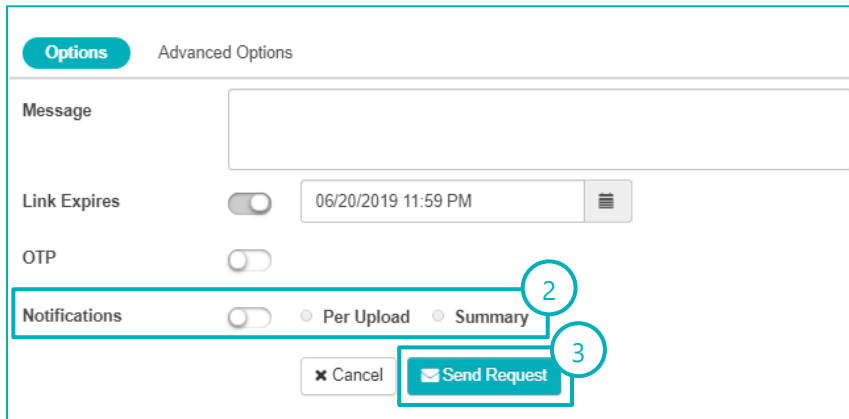
The screenshot shows the 'Advanced Options' section of a file request form. It includes a 'Message' text area, a 'Link Expires' date/time picker set to 06/20/2019 11:59 PM, an 'OTP' toggle switch, and 'Notifications' with radio buttons for 'Per Upload' and 'Summary'. At the bottom are 'Cancel' and 'Send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

**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

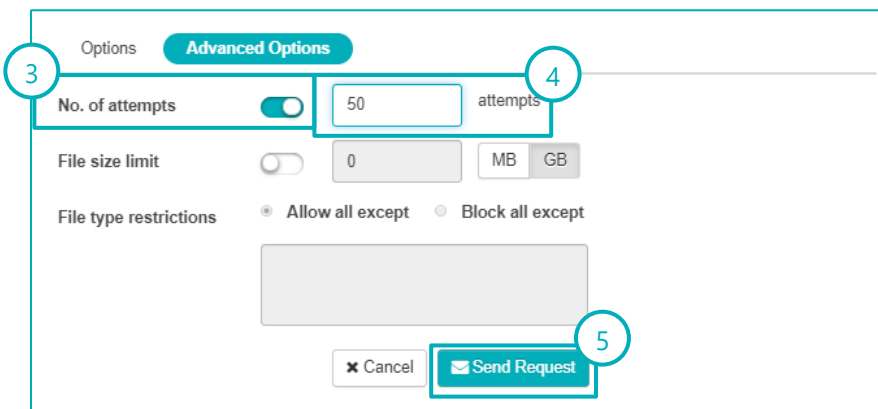
1. Refer to Section [File request](#) to begin requesting files.
2. Enable **Notifications**.  
**Per Upload:** An email will be sent to your inbox whenever a file is uploaded  
**Summary:** An email will be sent to your inbox at regular intervals to inform you of all uploads which occurred in the past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



The screenshot shows the 'Options' tab with 'Advanced Options' selected. The 'Notifications' section is highlighted with a red box and a red circle labeled '2'. The 'Per Upload' radio button is selected. The 'Send Request' button is highlighted with a red box and a red circle labeled '3'. The 'Link Expires' date is set to 06/20/2019 11:59 PM. The 'OTP' toggle is turned off. The 'Message' field is empty.

### 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**.



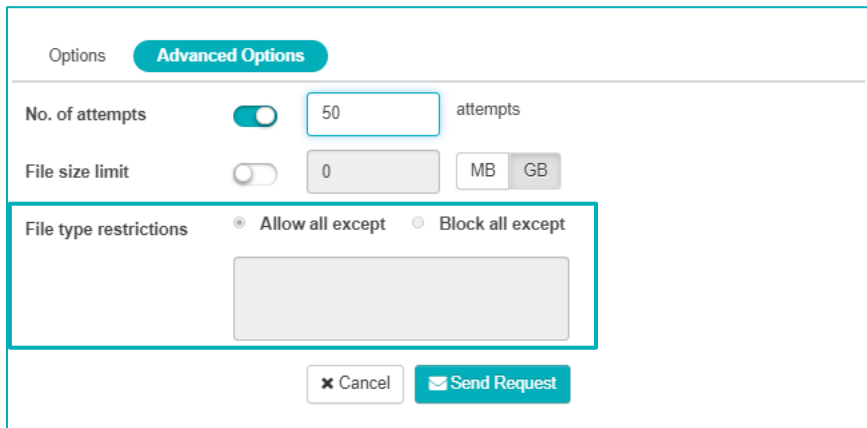
The screenshot shows the 'Advanced Options' tab. The 'No. of attempts' toggle is turned on, and the value '50' is entered in the adjacent text box. The 'Send Request' button is highlighted with a red box and a red circle labeled '5'. The 'File size limit' is set to 0 MB. The 'File type restrictions' are set to 'Allow all except'.



**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 View Restricted File Types

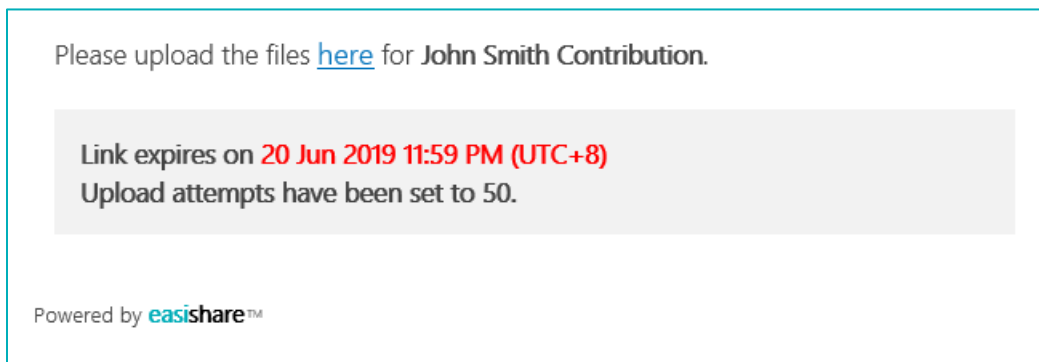
1. Refer to Section [File request](#) to begin requesting files.
2. Navigate to the next page by clicking **Advanced Options**.
3. View **File Type Restrictions**.
4. Click **Send Request**.



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 input field (0 MB/GB), and a 'File type restrictions' section with radio buttons for 'Allow all except' (selected) and 'Block all except'. Below these is an empty text area for restrictions. At the bottom are 'Cancel' and 'Send Request' buttons.

## 8.2 Upload Files Using File Request

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



The screenshot shows an email notification with the text: 'Please upload the files [here](#) for John Smith Contribution.' Below this is a grey box containing: 'Link expires on 20 Jun 2019 11:59 PM (UTC+8)' and 'Upload attempts have been set to 50.' At the bottom, it says '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.

File Requests

New View


Drives

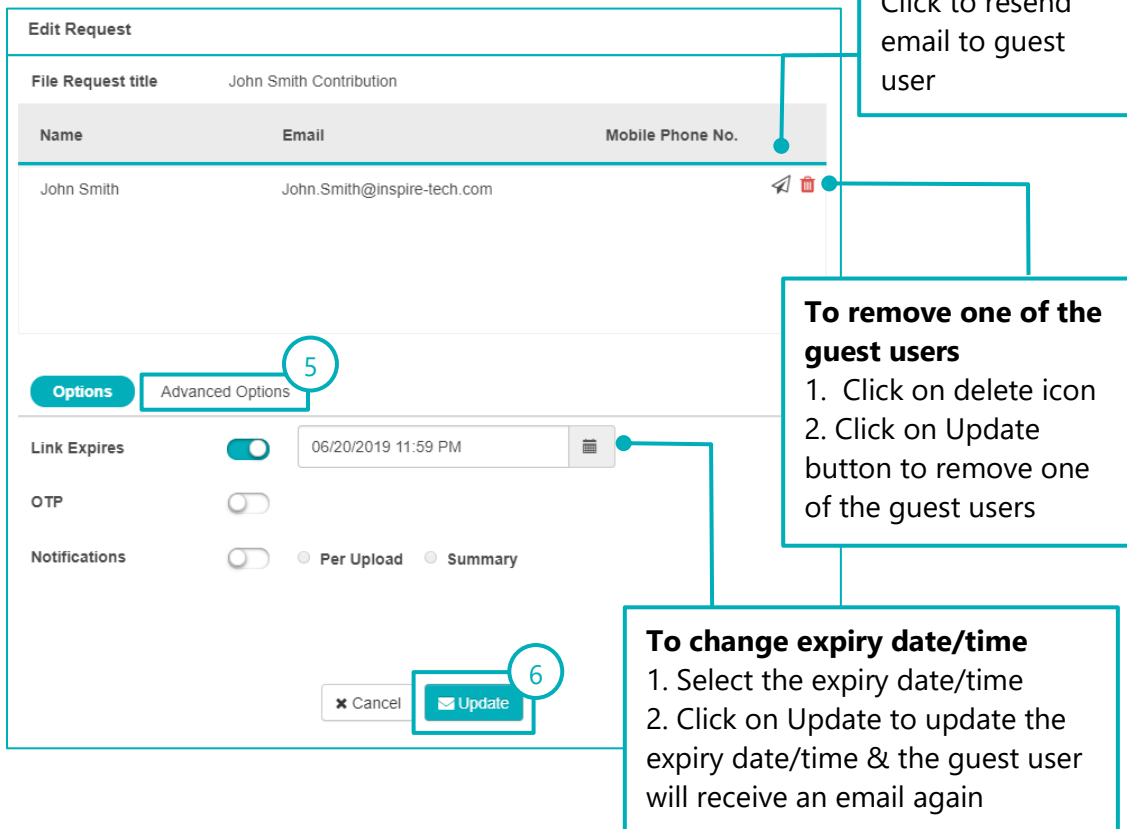
- Shared
  - Shared In
  - Shared Out
  - Managed Folders
- File Requests**
- Quick Access
- Personal
- Human Resource
- Sales

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

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.



The screenshot shows the 'Edit Request' window. At the top, the 'File Request title' is 'John Smith Contribution'. Below it is a table with columns 'Name', 'Email', and 'Mobile Phone No.'. The table contains one row for 'John Smith' with email 'John.Smith@inspire-tech.com'. To the right of the table are icons for 'resend email' (envelope) and 'remove user' (trash). Below the table are two tabs: 'Options' and 'Advanced Options' (highlighted with a blue circle and the number 5). Under 'Advanced Options', there are settings for 'Link Expires' (a toggle switch and a date/time picker set to '06/20/2019 11:59 PM'), 'OTP' (a toggle switch), and 'Notifications' (a toggle switch and radio buttons for 'Per Upload' and 'Summary'). At the bottom are 'Cancel' and 'Update' buttons. The 'Update' button is highlighted with a blue circle and the number 6. Three callout boxes provide instructions: 'To resend email' points to the resend icon, 'To remove one of the guest users' points to the trash icon, and 'To change expiry date/time' points to the date/time picker.


**To resend email**  
Click to resend email to guest user

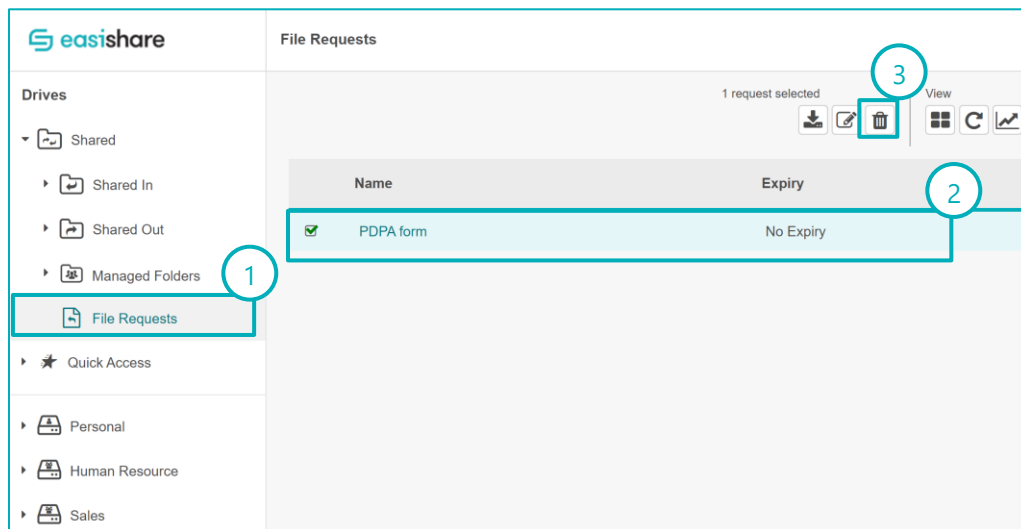
**To remove one of the guest users**  
1. Click on delete icon  
2. Click on Update button to remove one of the guest users

**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.

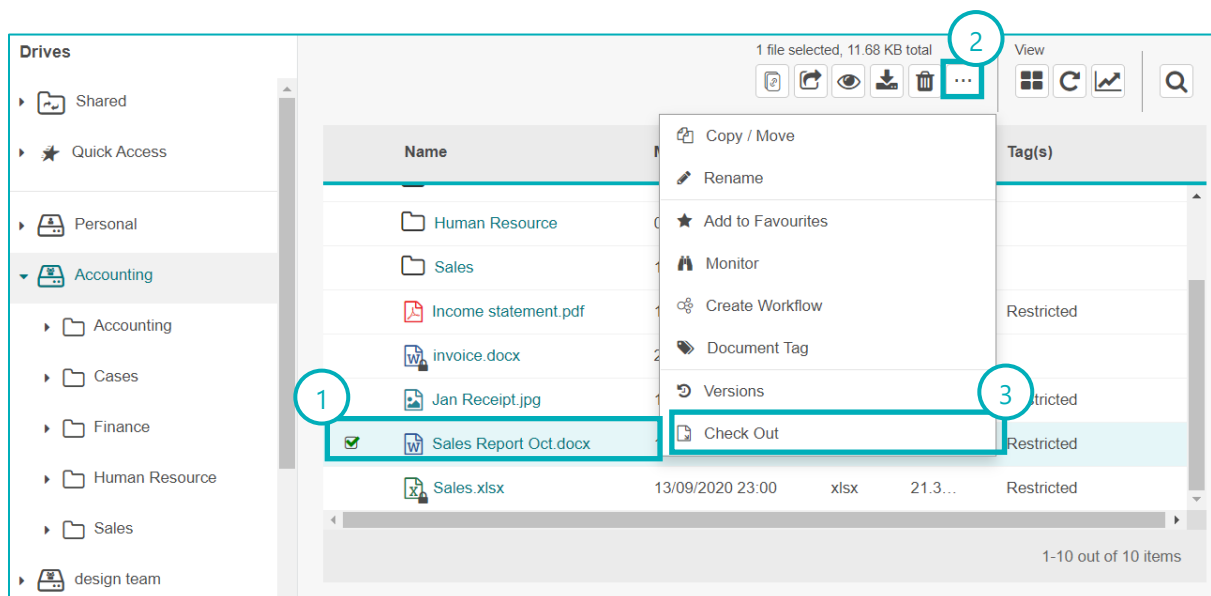


## 9 Check in/Out

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 More .
3. Click on **Check Out** .



4. An edit icon will appear on the file icon on the user's PC while a lock icon will appear on the file icon on another user's PC.
5. A check out success message will appear.

6. Hover over the lock icon to find the name of the user who checked out the file.

The screenshot shows the EasiShare web portal interface. On the left is a sidebar with 'Drives' including Shared, Quick Access, Personal, Accounting (selected), Cases, Finance, Human Resource, Sales, and design team. The main area displays the 'Accounting' drive contents. A green notification bar at the top right states 'File checked out successfully' with a circled '4'. The file list table has columns: Name, Modified, Type, Size, and Tag(s). The file 'invoice.docx' is highlighted with a circled '5' next to its lock icon.

Name	Modified	Type	Size	Tag(s)
Human Resource	06/05/2021 11:31			
Sales	11/04/2021 21:44			
Income statement.pdf	14/09/2020 19:06	pdf	4.6 MB	Restricted
invoice.docx	29/03/2021 22:11	docx	18.4...	
Jan Receipt.jpg	14/09/2020 00:00	jpg	70.0...	Restricted
Sales Report Oct.docx	14/04/2021 17:54	docx	11.6...	Restricted
Sales.xlsx	13/09/2020 23:00	xlsx	21.3...	Restricted

1-10 out of 10 items

7. 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.
8. 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.

The screenshot shows the 'File Versions' dialog box. It contains a table with columns: No., Uploaded, Modified, Modified By, Size, and Comments. Three versions are listed: 0.3, 0.2, and 0.1. A circled '7' highlights the download icon in the 'Comments' column for version 0.3.



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 ...	

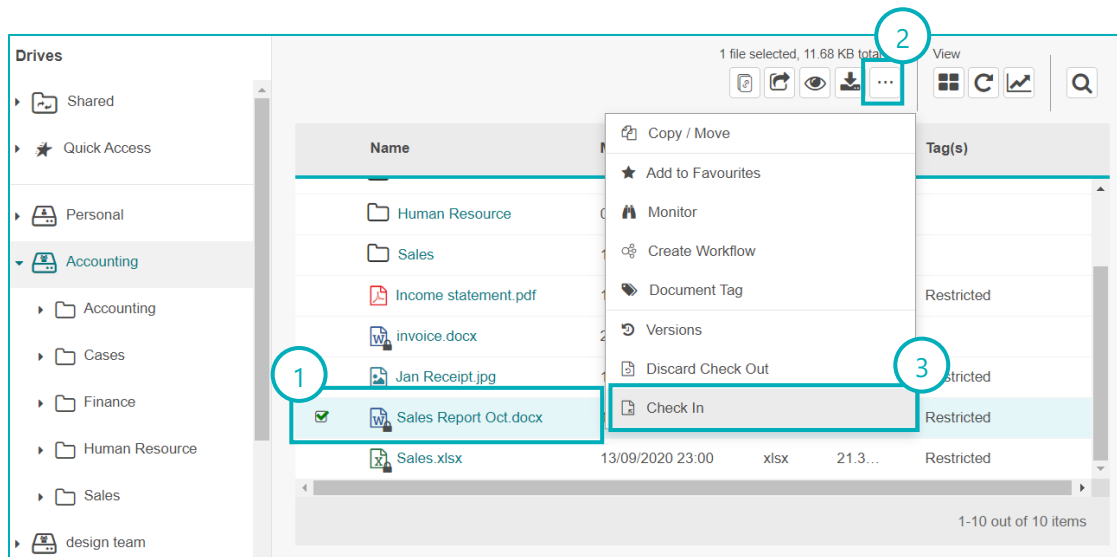
1-3 out of 3 items

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 More .
3. Click on **Check In** .



4. A pop-up window will appear.
5. Click **Yes** Or **No**, Yes is to **retain** "Check out" after checking in and **No** is to **remove** "Check out" after checking in.
6. Comment in the **Comment** text box. Click **OK**

### Check In

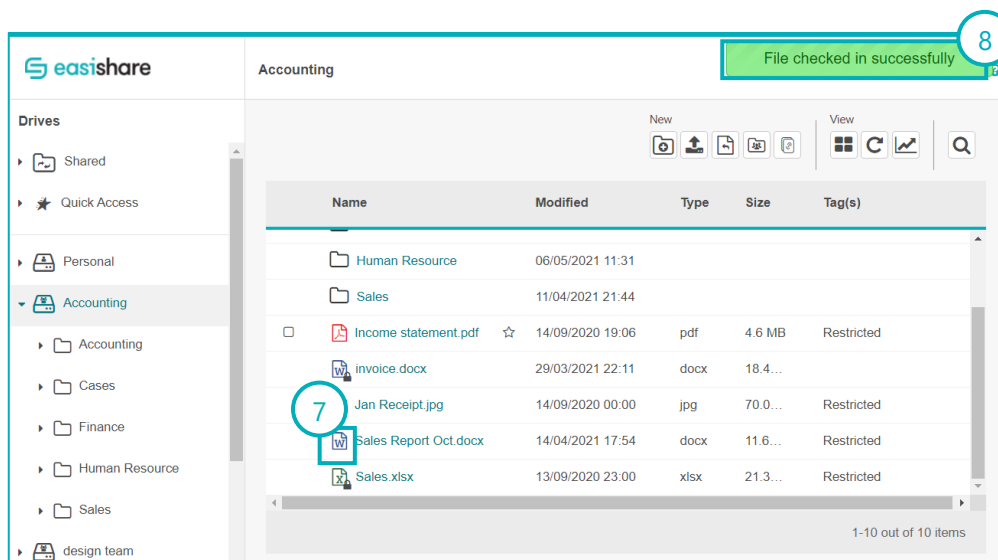
**Feb Invoice.docx**

Retain check out after checking in? ☐ Yes ☒ No

Comments:



7. The lock icon on the file will **disappear**.
8. A check in success message will appear.



9. The **version** number that was created during **check out** will be recorded. This version is visible to all users.
10. After **check in**, **all actions** are **available** to all users. Any users can choose to perform any file actions **as per normal**.

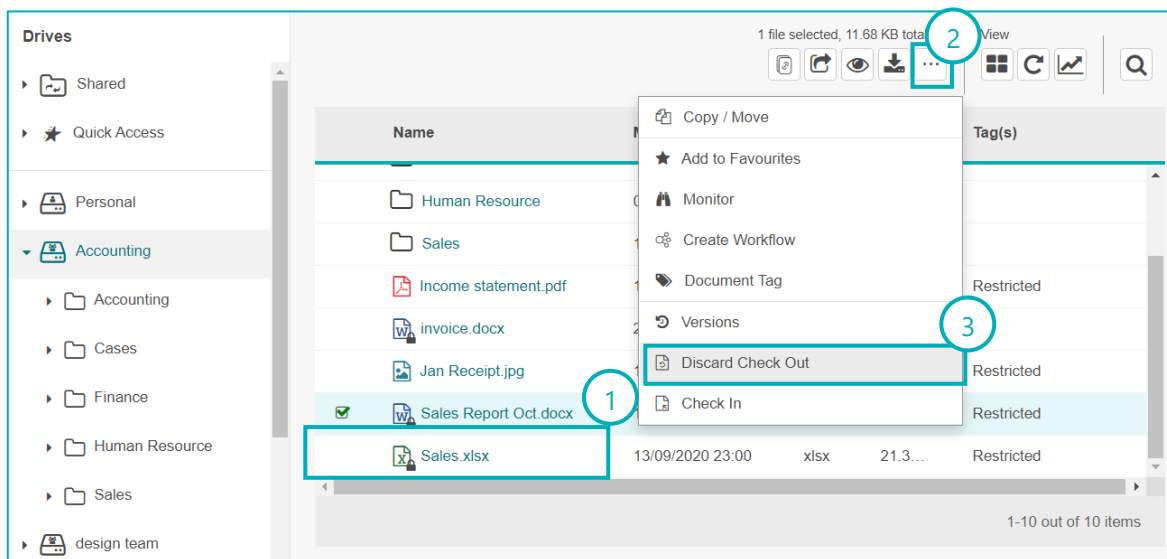
File Versions					
No.	Uploaded	Modified	Modified By	Size	Comments
0.3	06/21/2019 9:34 ...	06/18/2019 2:28 ...	Jane Brown	12.18 ...	
0.2	06/21/2019 9:33 ...	06/18/2019 2:28 ...	Jane Brown	12.18 ...	
0.1	06/18/2019 2:28 ...	06/18/2019 2:28 ...	Jane Brown	12.18 ...	
1-3 out of 3 items					
<div>✕ Close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

### 9.3 Discard Check Out

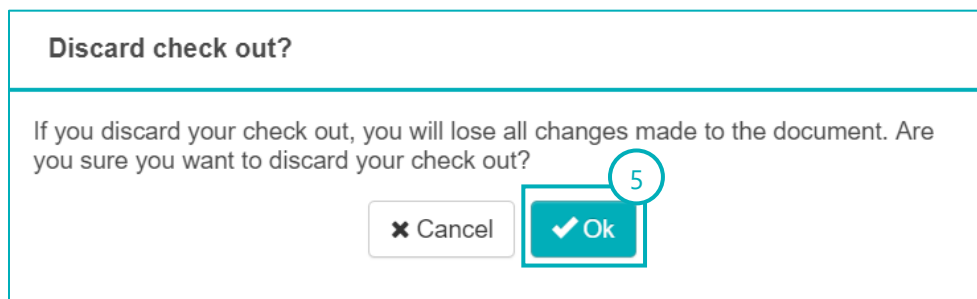
1. Select the file that was checked out.
2. Click on More



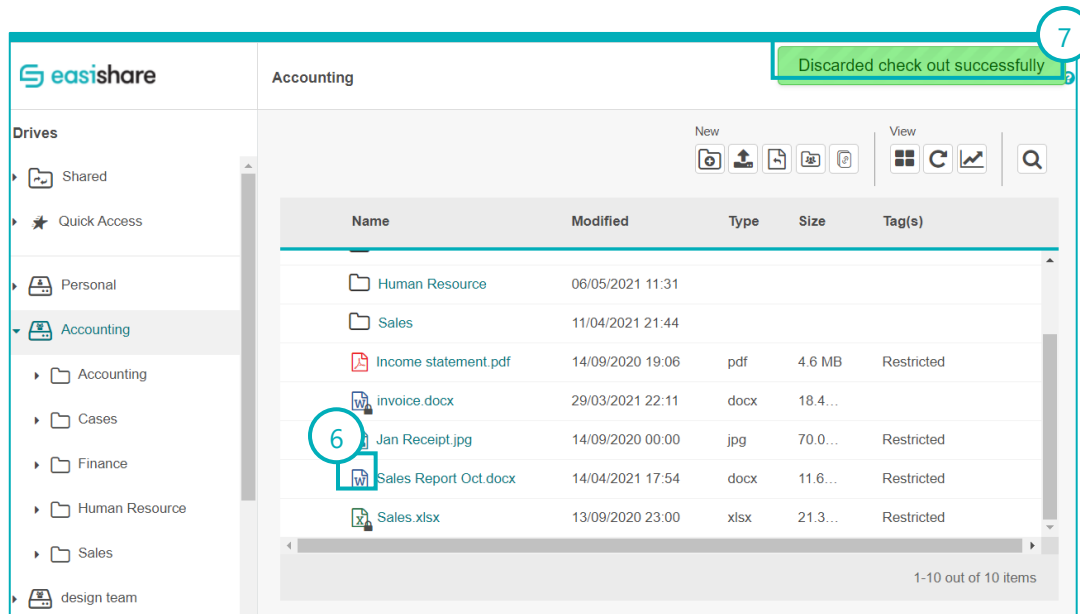
3. Click on **Discard Check Out** .





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



6. The Lock Icon is not on the file anymore.
7. A Discard Check Out success message will appear.





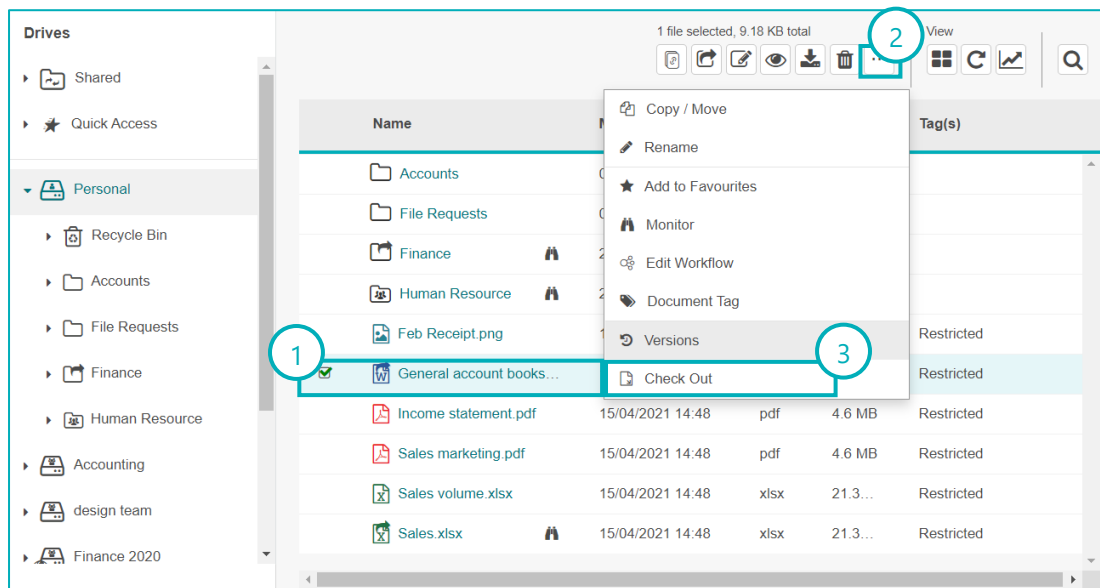
8. The **version number** that was created **during check out** will be **discarded**.
9. Any users can choose to perform any file actions **as per normal**. **All actions** are **available** to **all users**.

File Versions					
No.	Uploaded	Modified	Modified By	Size	Comments
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 ...	
1-2 out of 2 items					
<div>✕ Close</div>					

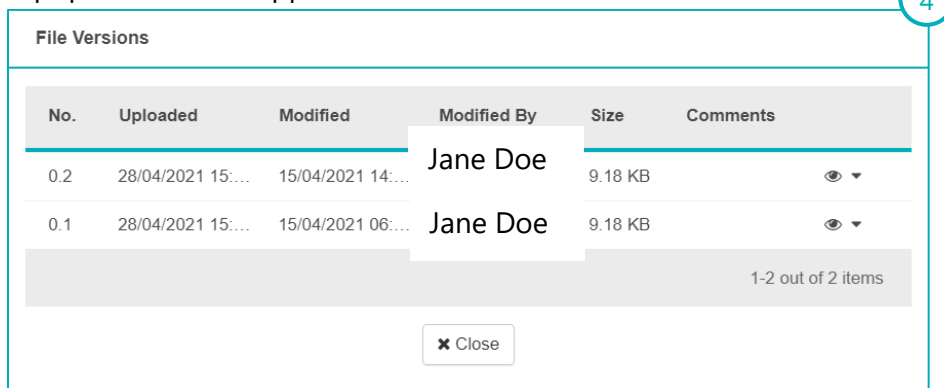
## 10 Versioning

### 10.1 View File Version

1. Select a file.
2. Click on the **Options**  located at the top.
3. Click on **Versions** .

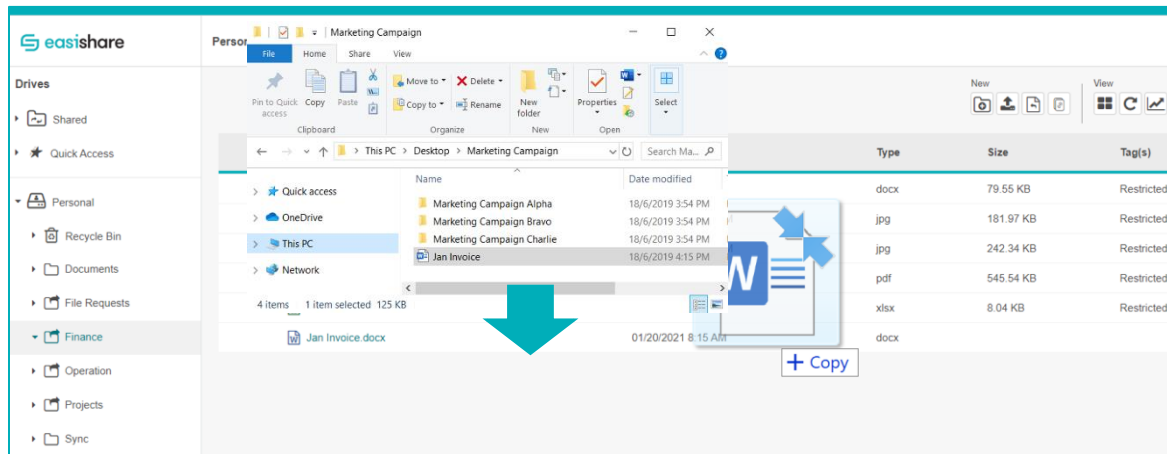


4. A pop-window will appear.



### 10.2 Create New Version

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





## Attention

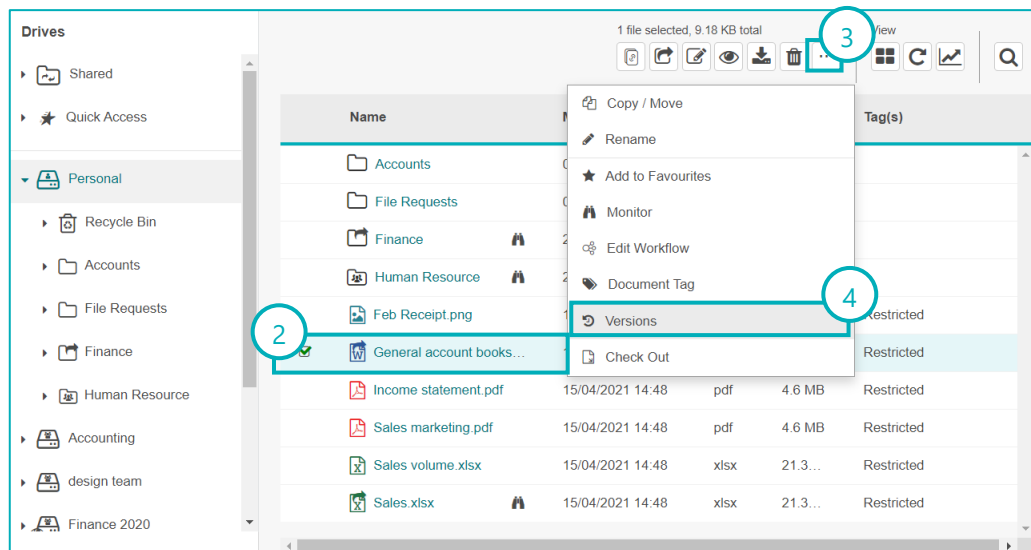
### File with same name already exists, overwrite?

- Jan Invoice.docx

✕ Cancel

✓ Overwrite

2. Select File Uploaded
3. Click on the **Options**  located at the top.
4. Click on **Versions** .








5. A pop-up window will appear.
6. A new version number will be created.

File Versions					
No.	Uploaded	Modified	Modified By	Size	Comments
0.1	11/25/2021 10:...	09/08/2021 4:4...	Unknown	18.42 ...	
1-1 out of 1 items					

### 10.3 Restore Version

1. Go to version by this [Section](#) (10.2) View Version.
2. A pop-up window will appear.
3. Click on the dropdown icon and select **Restore** along the respective version you wish to restore to.

File Versions					
No.	Uploaded	Modified	Modified By	Size	Comments
0.2	08/18/2021 3:3...	08/18/2021 3:3...	John Smith	21.95 KB	--uploaded ... 
0.1	05/18/2021 10:...	09/13/2020 3:0...	John Smith	21.34 KB	
<div>  Download            Restore         </div>					
<div>  Close         </div>					

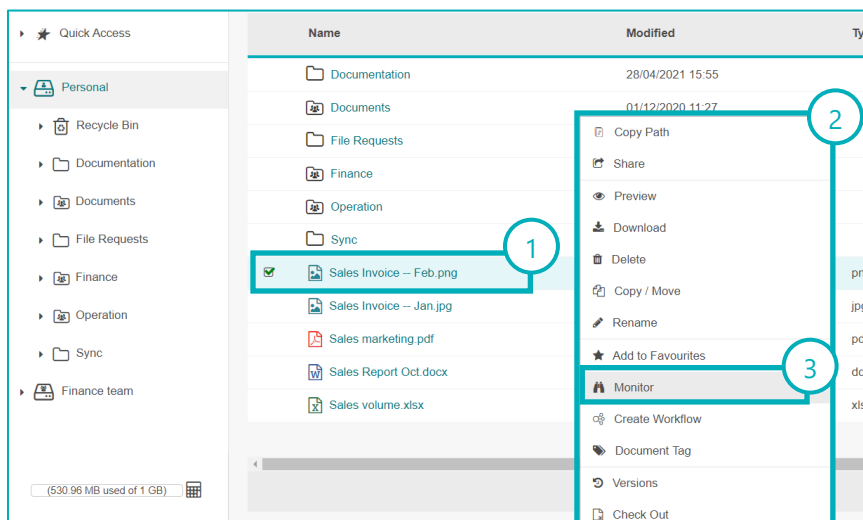
4.

## 11 Monitor

EasiShare's **Monitor** feature allows all users to keep track of the changes made to the files such as modifications, deletions, and new uploads etc. 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. Click **Monitor**.

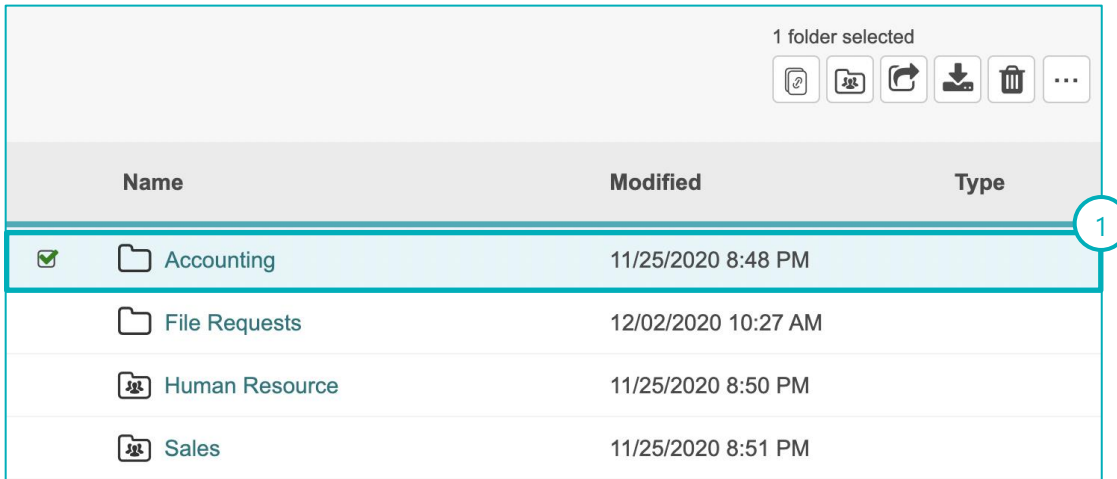


Option	Description
Changes > Modified	When the file has been overwritten
Changes > Deleted	When the file has been deleted
Changes > Unlocked	When the file is Discard Check-Out
Changes > Share Changed	When the file was shared
Frequency	To control when you will receive an email notification <ul style="list-style-type: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





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

## 11.2 Monitor a folder

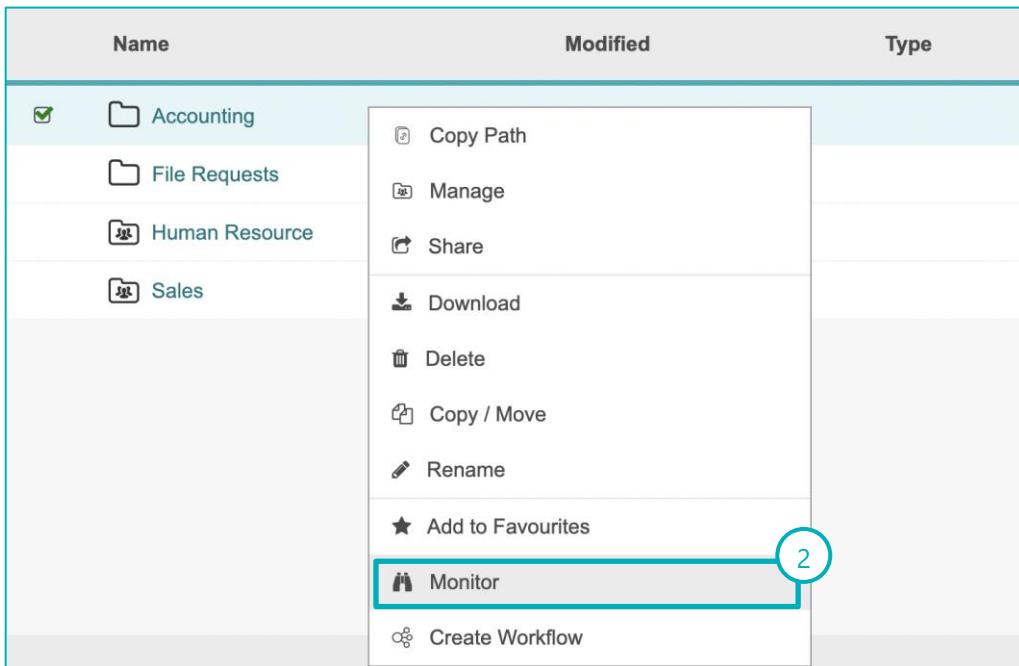
1. Select the folder that you wish to monitor

















1 folder selected

Name	Modified	Type
<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 the folder and select Monitor



Name	Modified	Type
<input checked="" type="checkbox"/>  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**

Immediatly

**When**

Any changes

Cancel

Stop

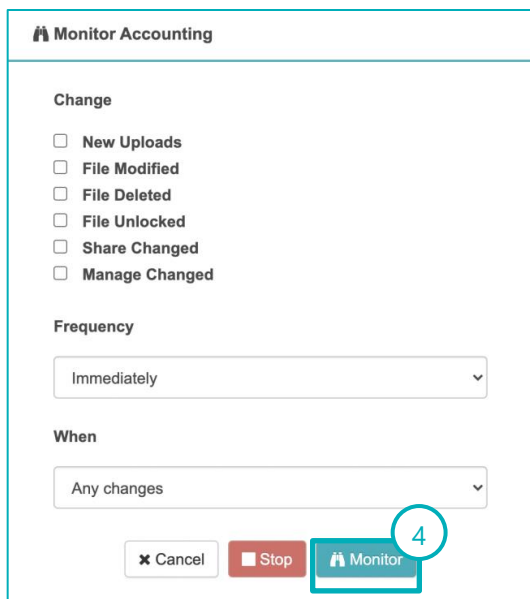
Monitor

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"> <li>Any changes to document(s) created by me</li> <li>Someone else changes document(s) created by me</li> <li>Someone else changes document(s) last edited by me</li> </ul>
Frequency	<p>To control when you will receive an email notification</p> <ul style="list-style-type: none"> <li>Immediatly</li> </ul>








	<ul style="list-style-type: none"> <li>• Daily (Default: 9AM)</li> <li>• Weekly (Default: Monday)</li> </ul>
When	<p>Available selection:</p> <ul style="list-style-type: none"> <li>• Any changes</li> <li>• Someone else changes</li> <li>• Any changes to document(s) created by me</li> <li>• Someone else changes document(s) created by me</li> <li>• Someone else changes document(s) last edited by me</li> </ul>

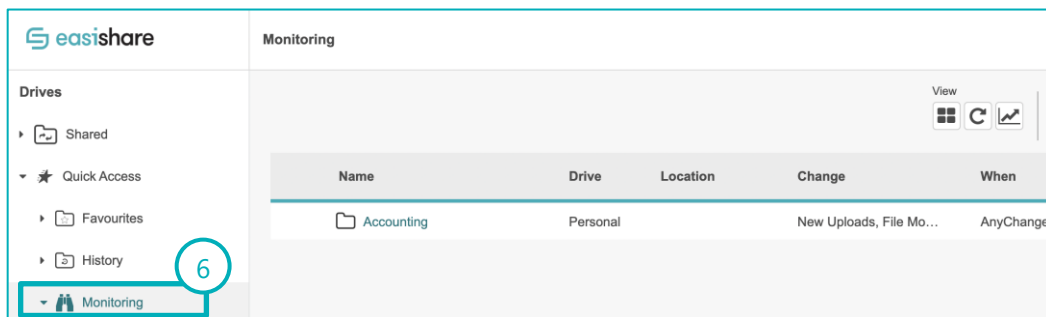
#### 4. Click on Monitor



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

Name	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



### 11.3 Stop Monitoring a File/Folder

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

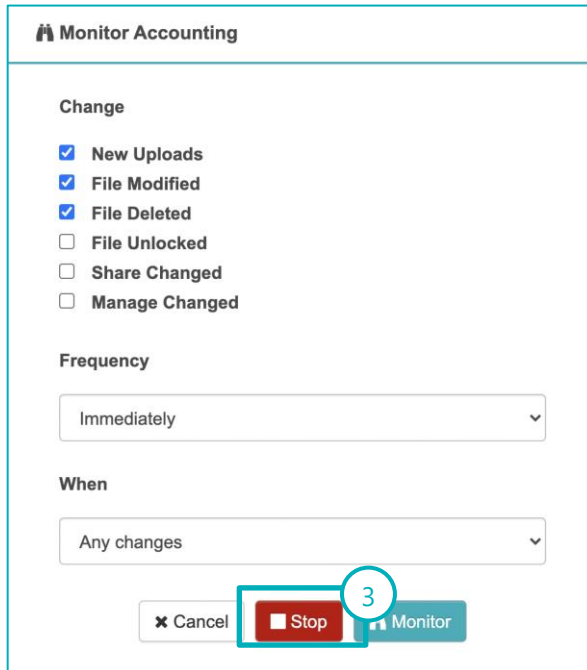
Name		Modified	
<input type="checkbox"/>	Accounting		11/25/2020 8:48 PM
	File Requests		12/02/2020 10:27 AM
	Human Resource		11/25/2020 8:50 PM
	Sales		11/25/2020 8:51 PM

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



The image shows a 'Monitor Accounting' dialog box. It has a title bar with a house icon and the text 'Monitor Accounting'. Inside, there are three sections: 'Change' with five checkboxes (New Uploads, File Modified, File Deleted, File Unlocked, Share Changed, Manage Changed), 'Frequency' with a dropdown menu set to 'Immediately', and 'When' with a dropdown menu set to 'Any changes'. At the bottom, there are three buttons: 'Cancel' (with an 'x' icon), 'Stop' (with a red square icon), and 'Monitor' (with a monitor icon). A red box highlights the 'Stop' button, and a blue circle with the number '3' is next to it.

## 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			
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. 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 approve

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

4 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	
<input checked="" type="checkbox"/>	Jane Brown
<input checked="" type="checkbox"/>	John Smith

3

Options

Share when ?

☒ ALL must approve ☐ ANYONE approve

4

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**

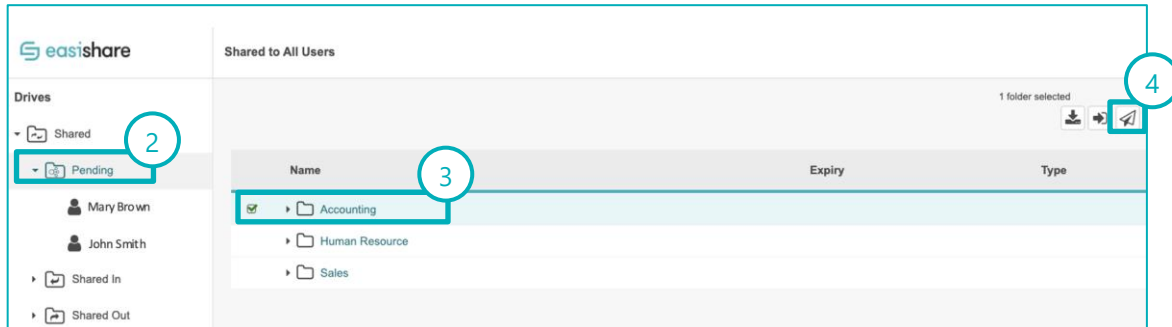
Share approval request will be sent to the following user(s):

- Mary Brown

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

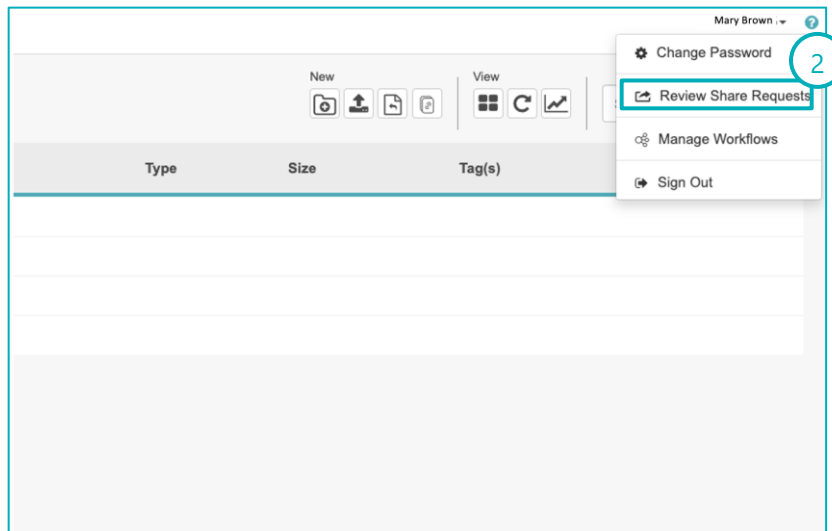
1

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

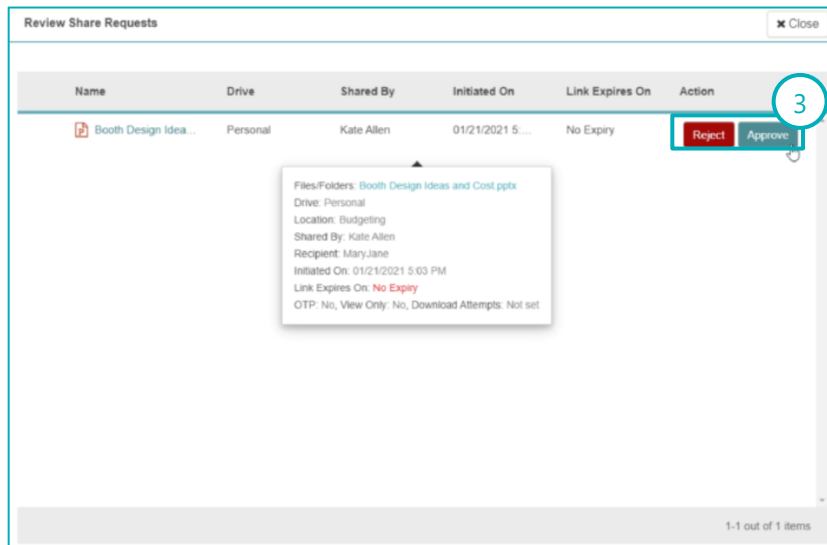


## 12.4 Approvers Approve or Reject with Comments

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.