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.

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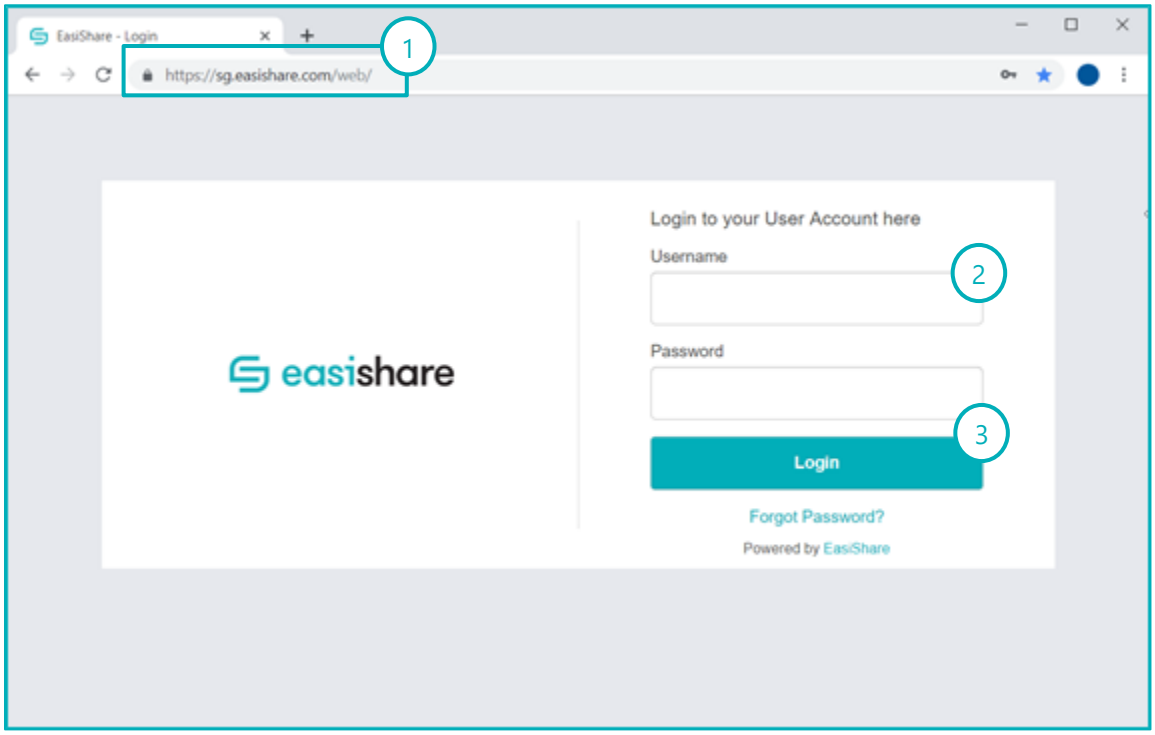
2 Login

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**.



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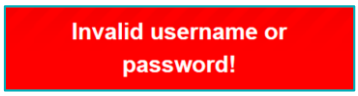
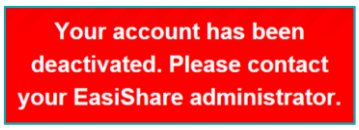
Login Errors:

If you encounter any error message below,

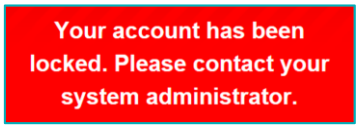
1. Username entered does not exist. Check that you have entered a correct username. Invalid password entered. Check that you have entered a correct password.



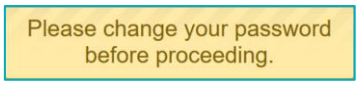
2. Your account has been disabled. Check with your Administrator.



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



4. Your must change your password before login.



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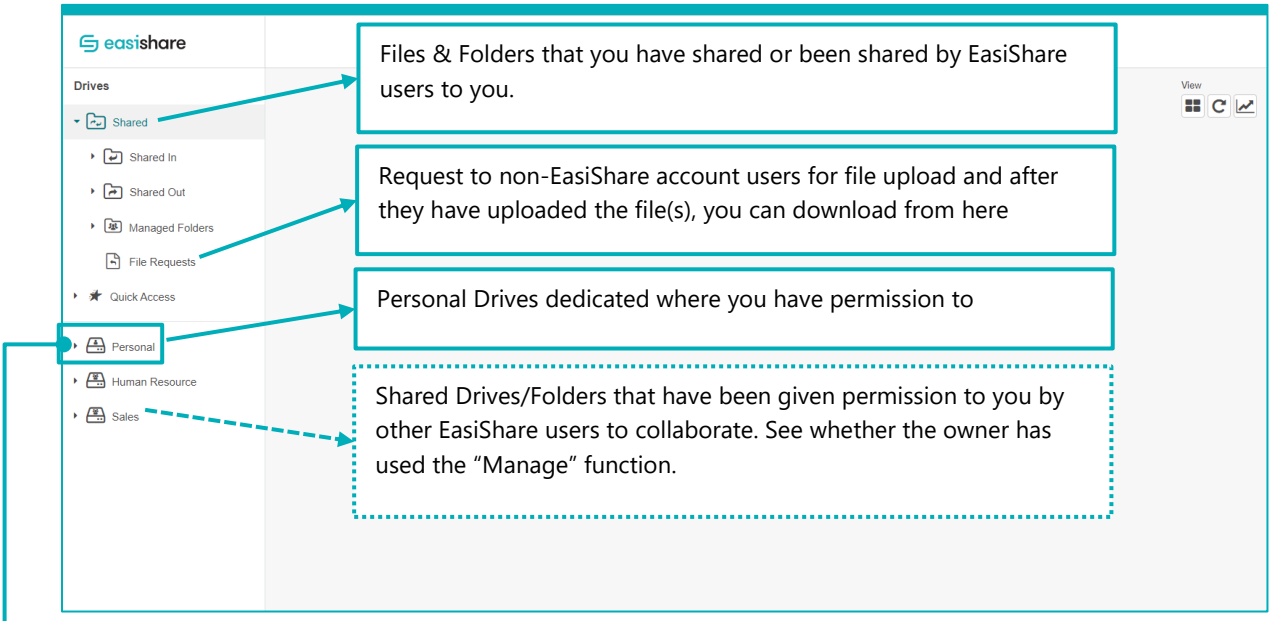
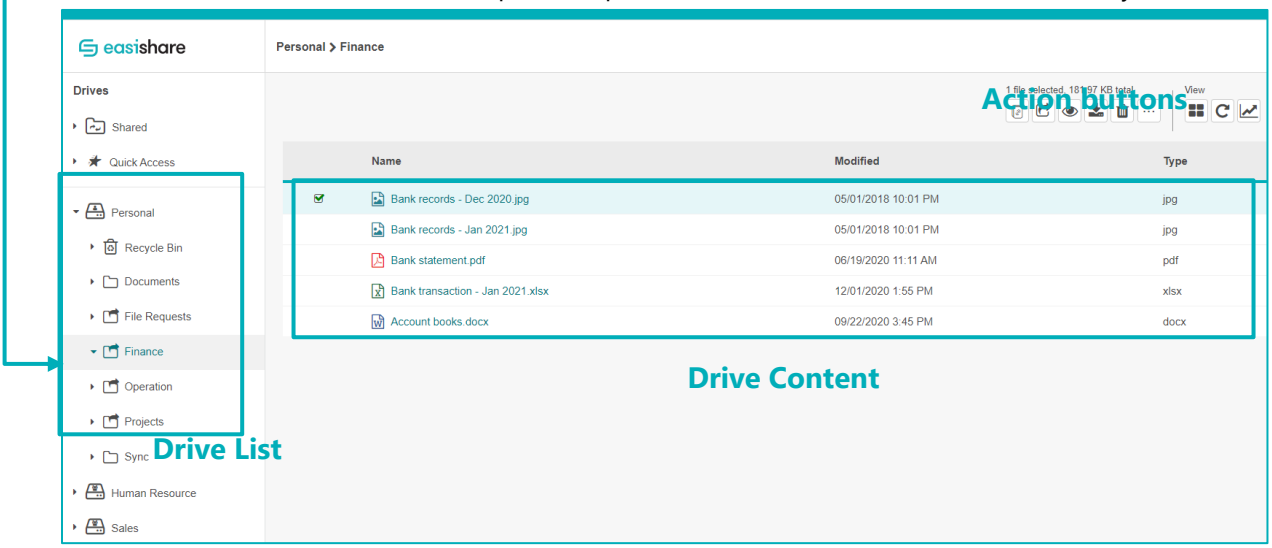
2.2 Accessing EasiShare

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



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..



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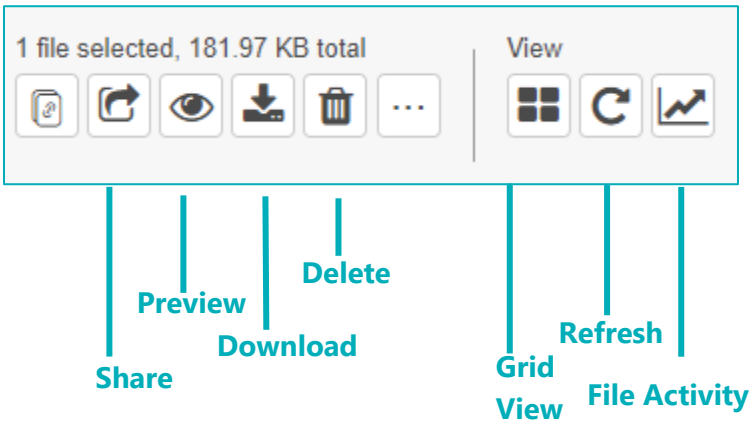
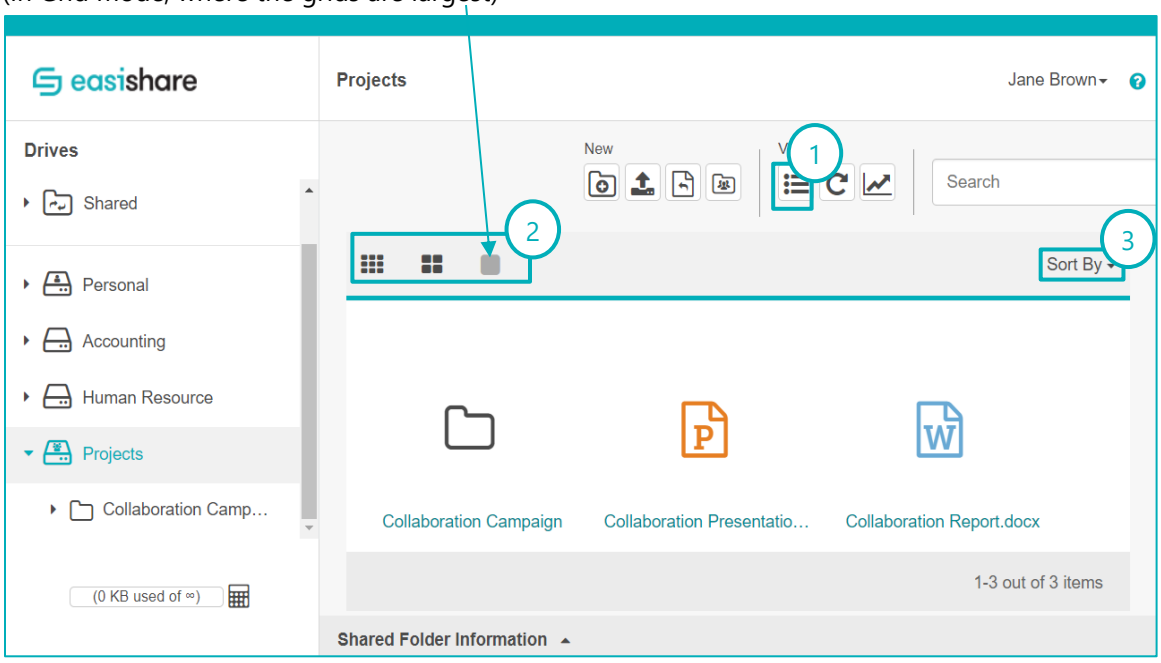
3. More tools are located at the left side of the search bar.



2.3 Switching Views

1. 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.
2. Three Sizes of choice are given, from left to right, small, medium and large views.
3. User will be able to Sort according to their preference with the help of sorting menu.

(In Grid mode, where the grids are largest)



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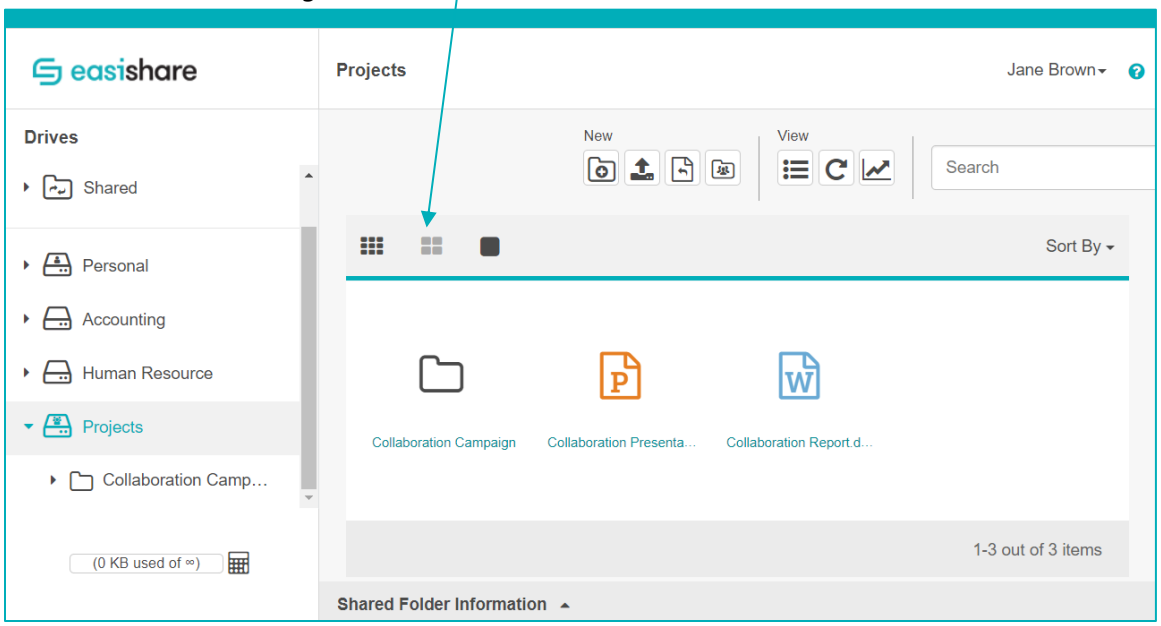
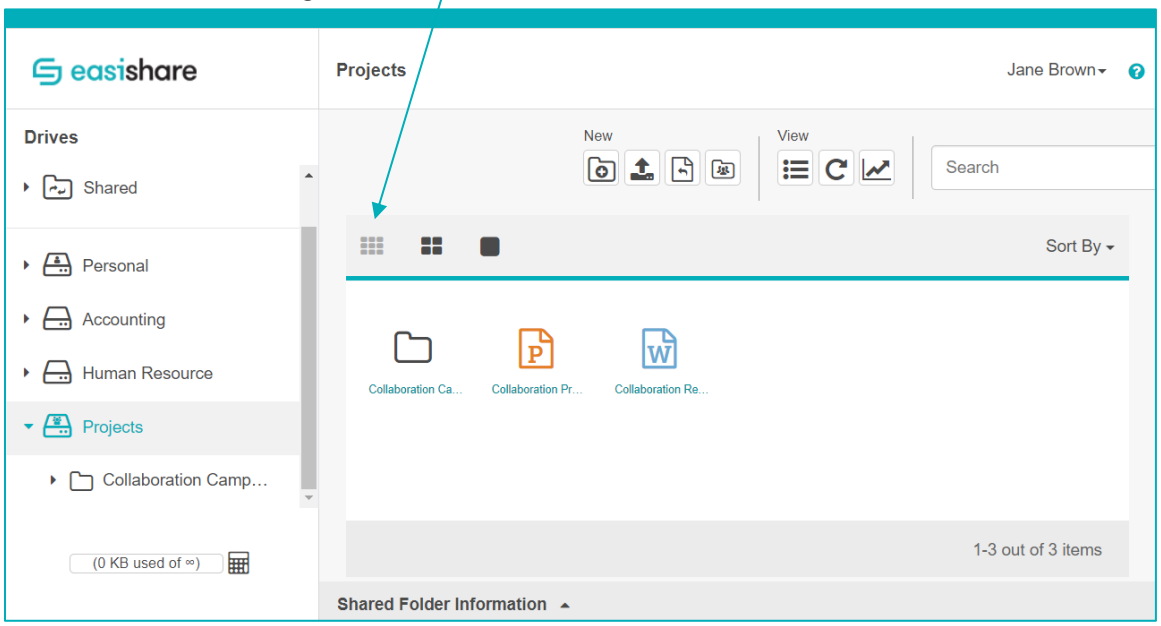
(In Grid mode, where the grids are medium)



(In Grid mode, where the grids are small)



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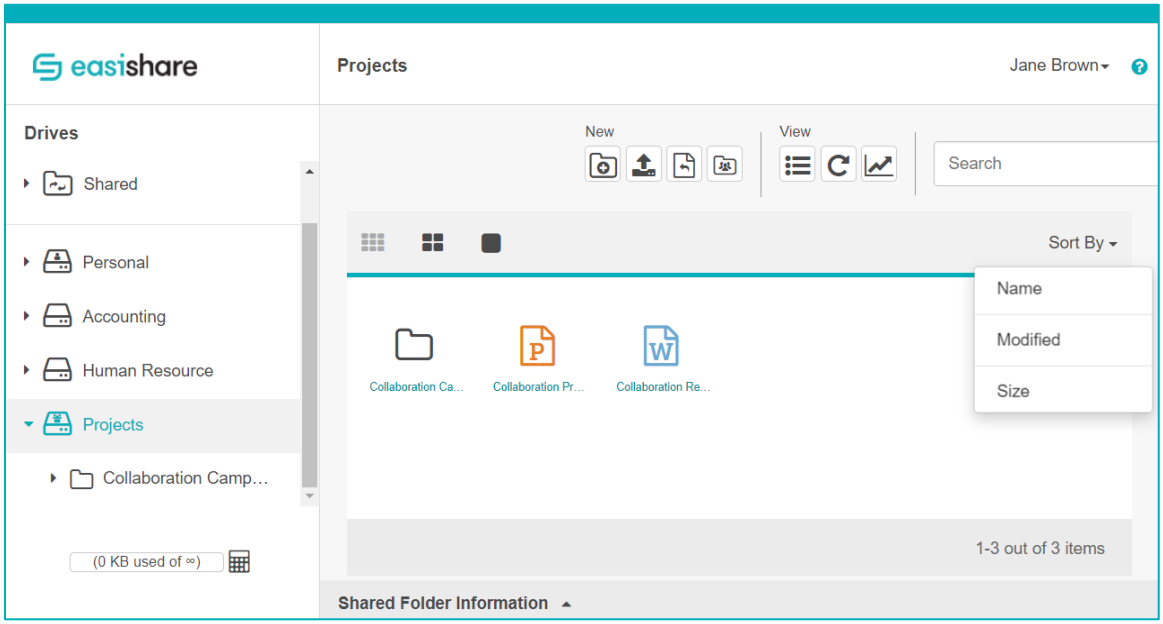
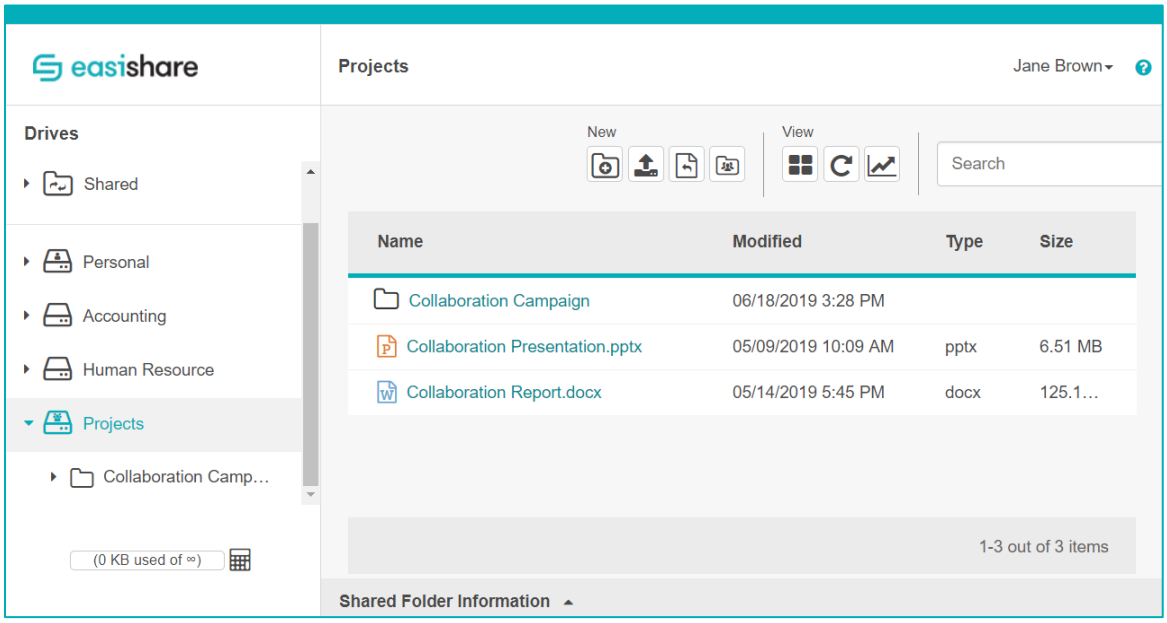
(In Grid mode, different types of sorting) *note that the type of sorting remains the same*



(In list mode)



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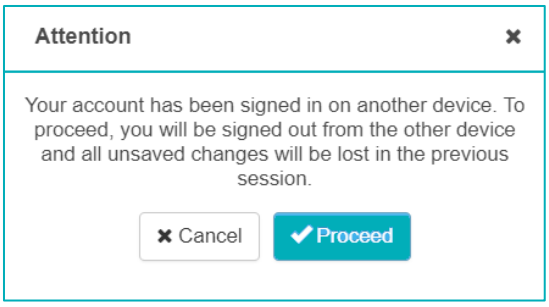
2.4 Concurrent Login

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.

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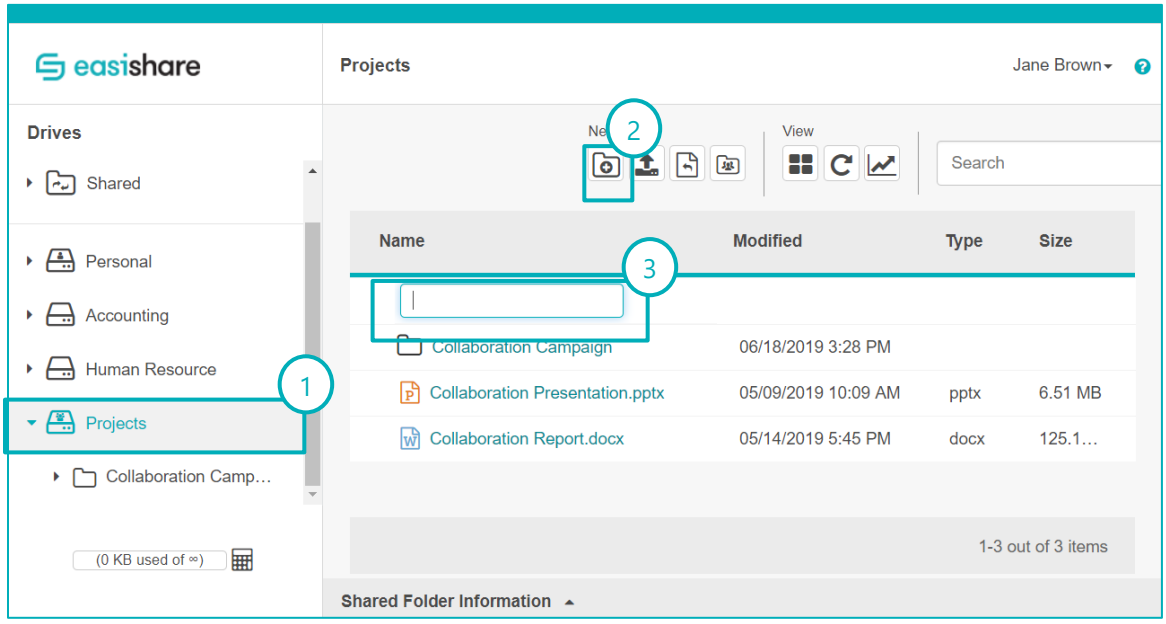

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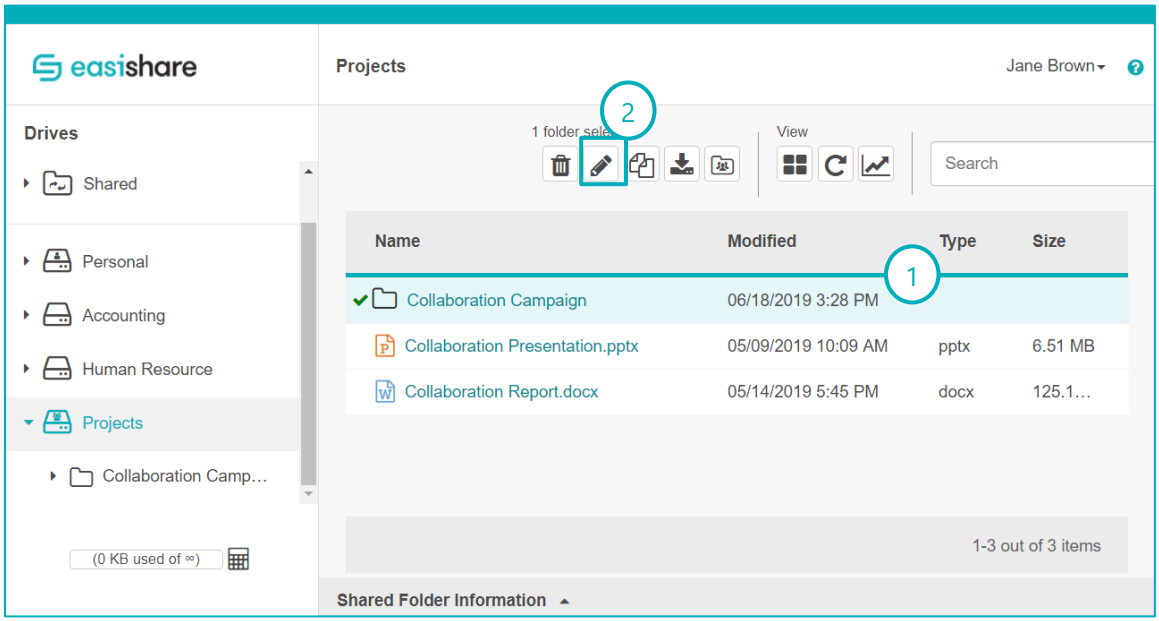
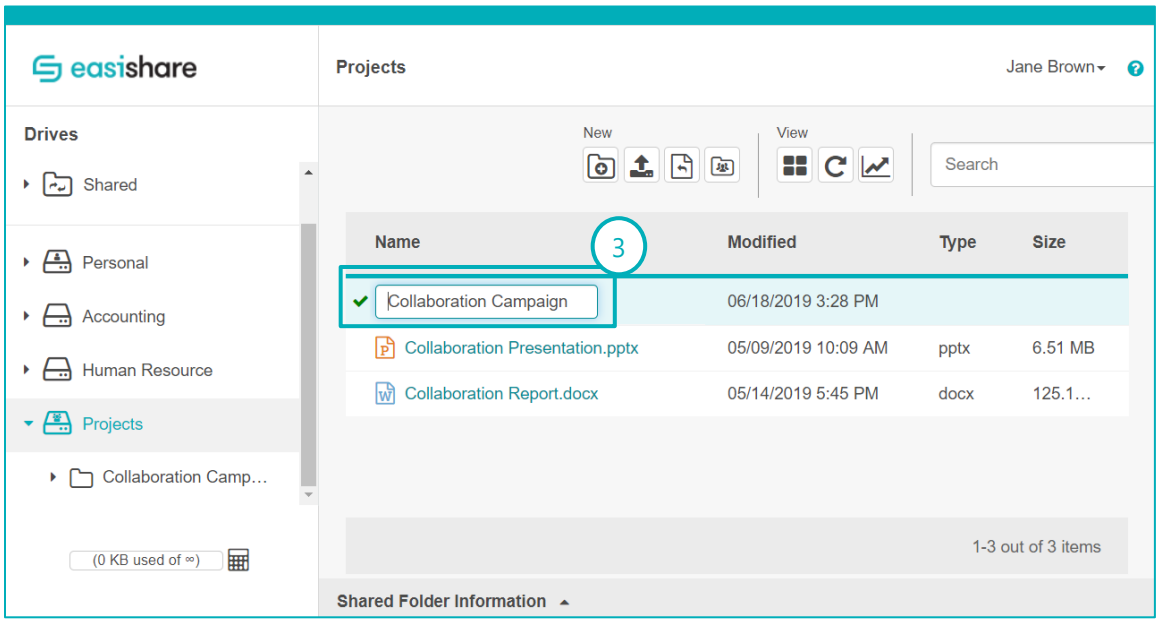
3.2 Rename a Folder

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.



3. Enter new folder name.



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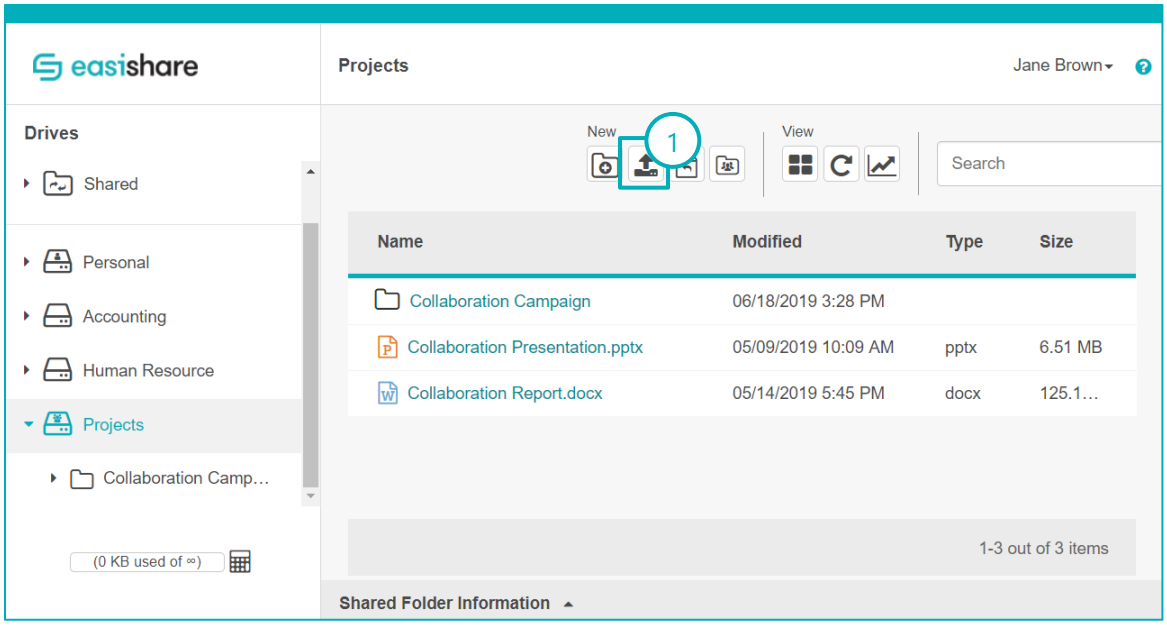
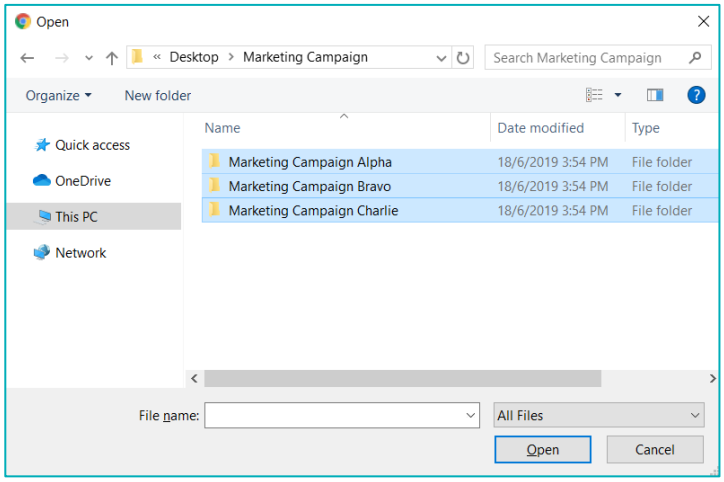
4 Upload Files

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.



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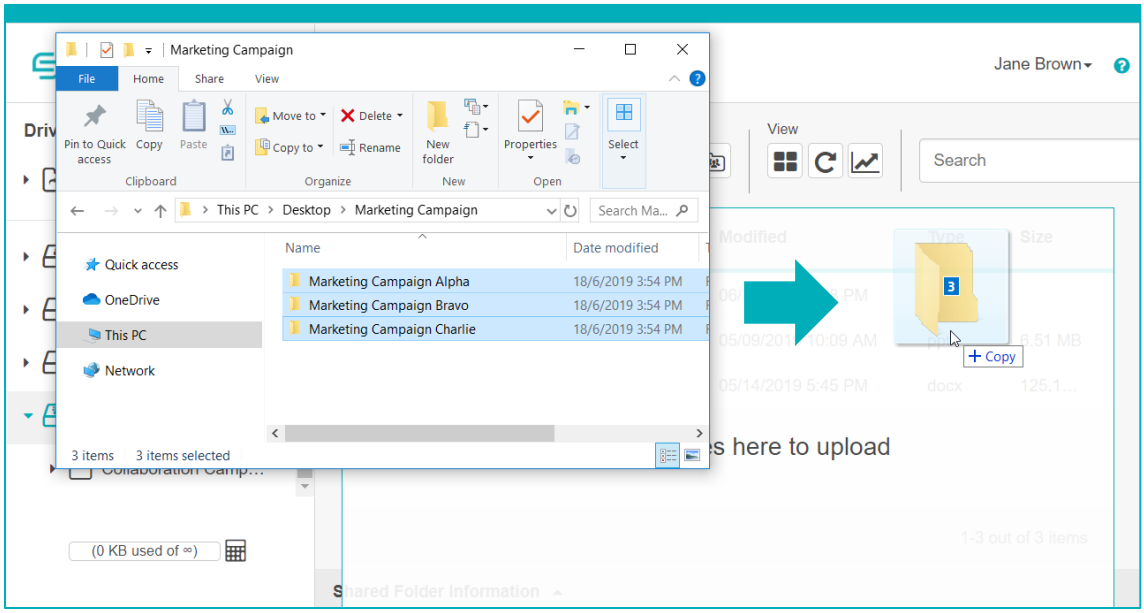
4.2 Using “Drag & Drop” Method

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



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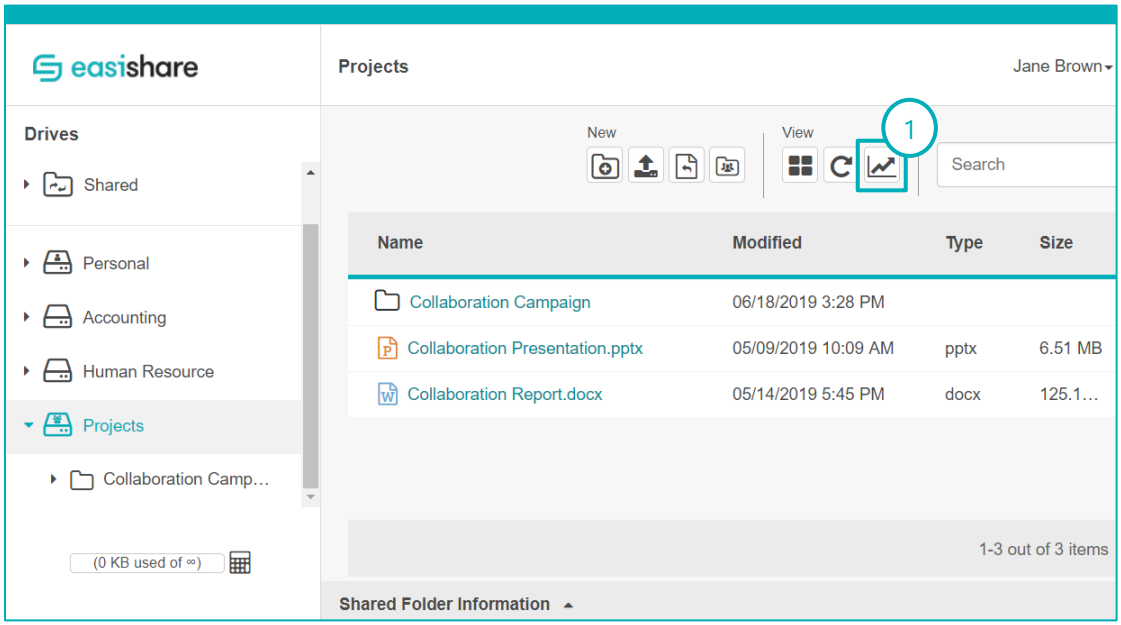
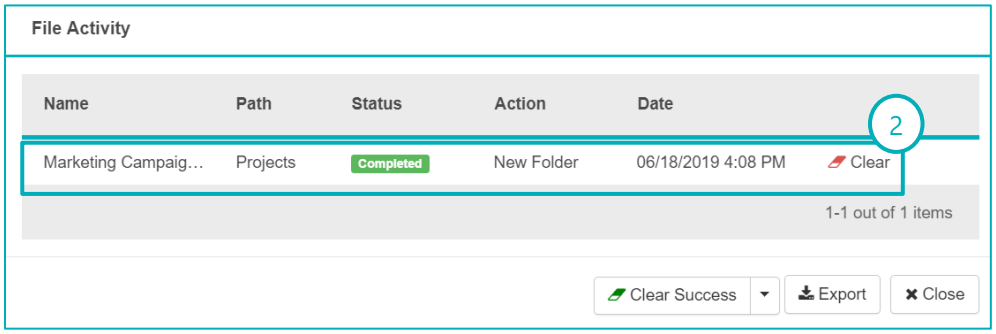
4.3 Check Upload Status

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.





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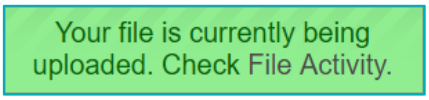
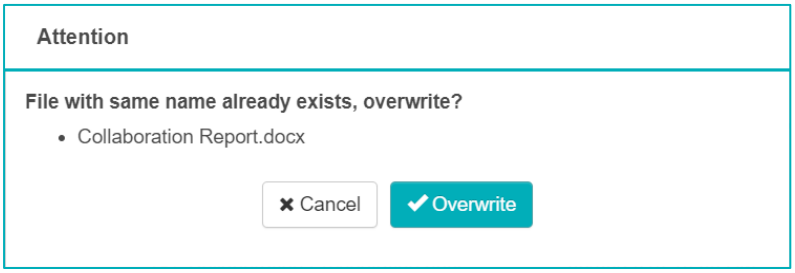
Note: You may encounter these pop-up messages.

File Upload Successfully



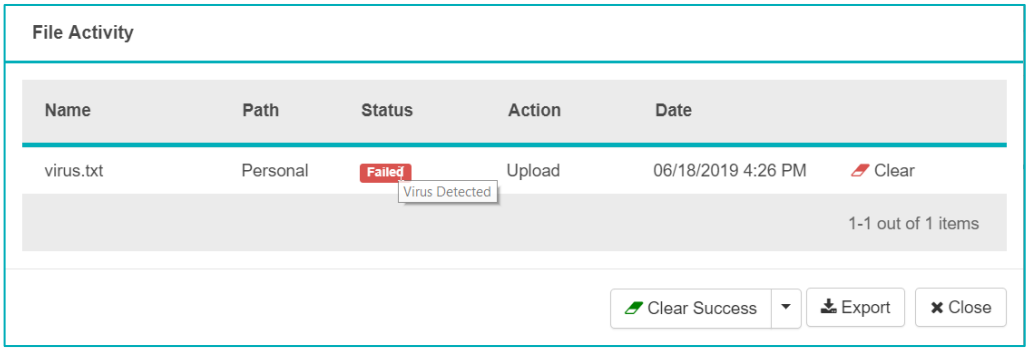
File with same name already exists



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.



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

Note:

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

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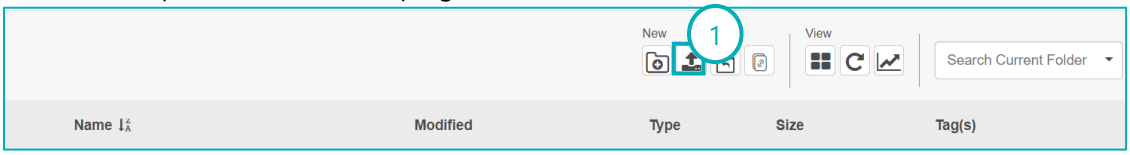
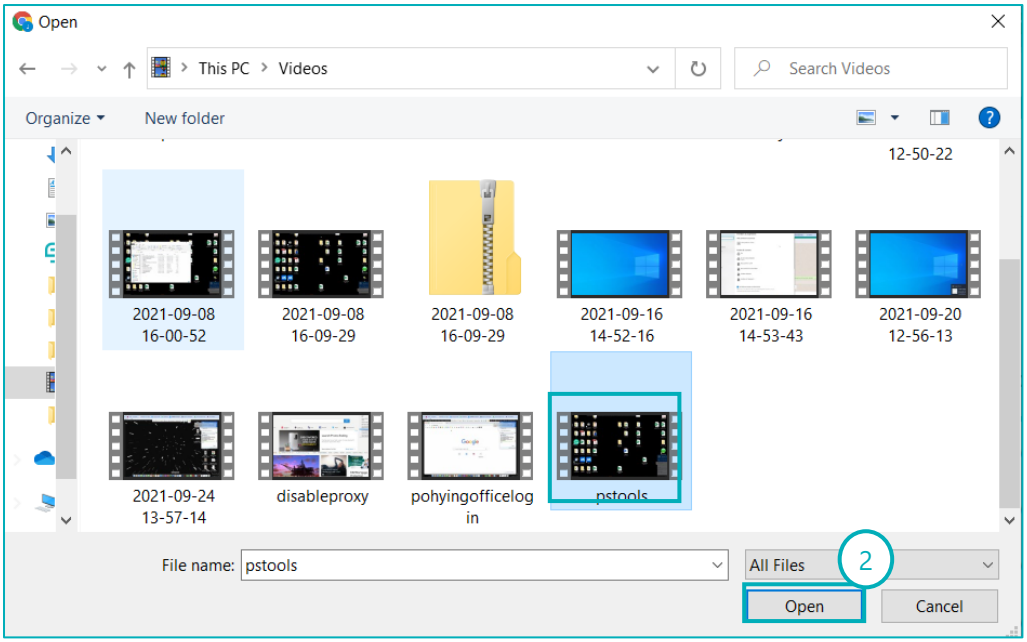
5 File Operations

5.1 Create a File

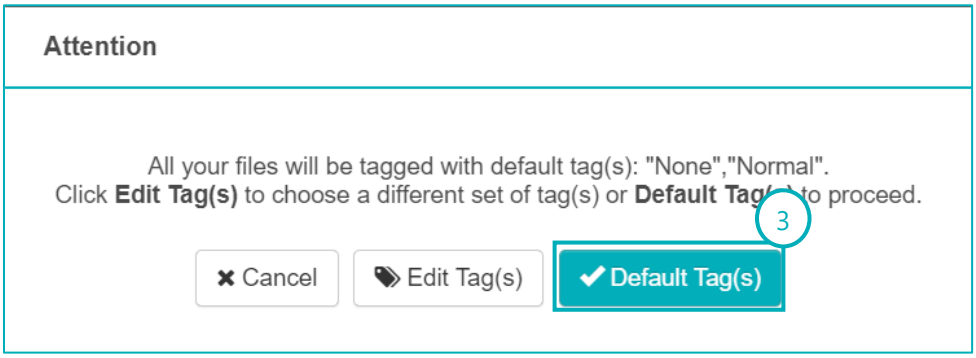
1. Click on the upload icon on the top right.



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…”

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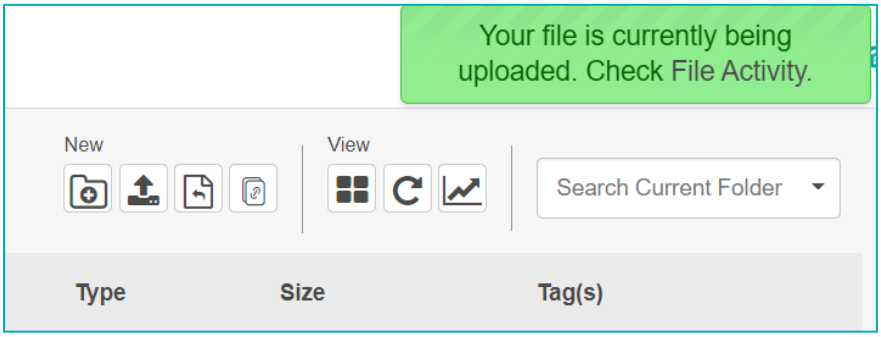
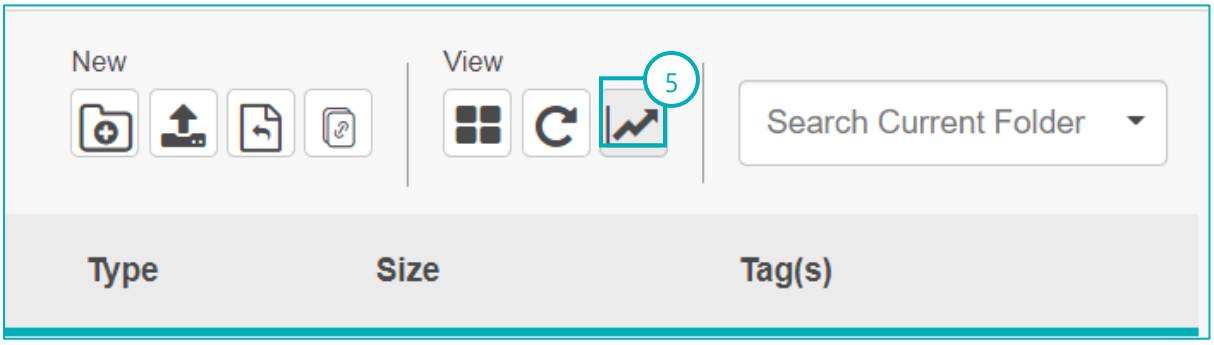
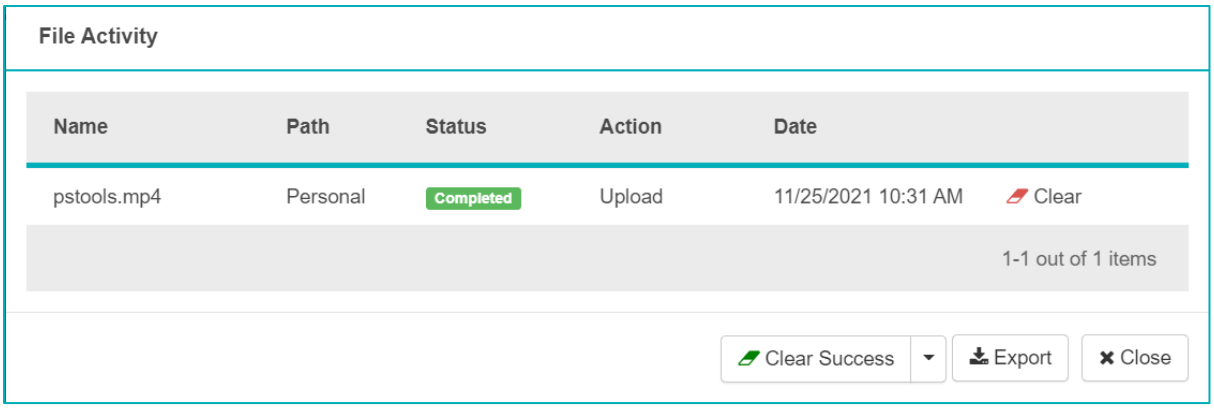


5. Click on File Activity.



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



5.2 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.

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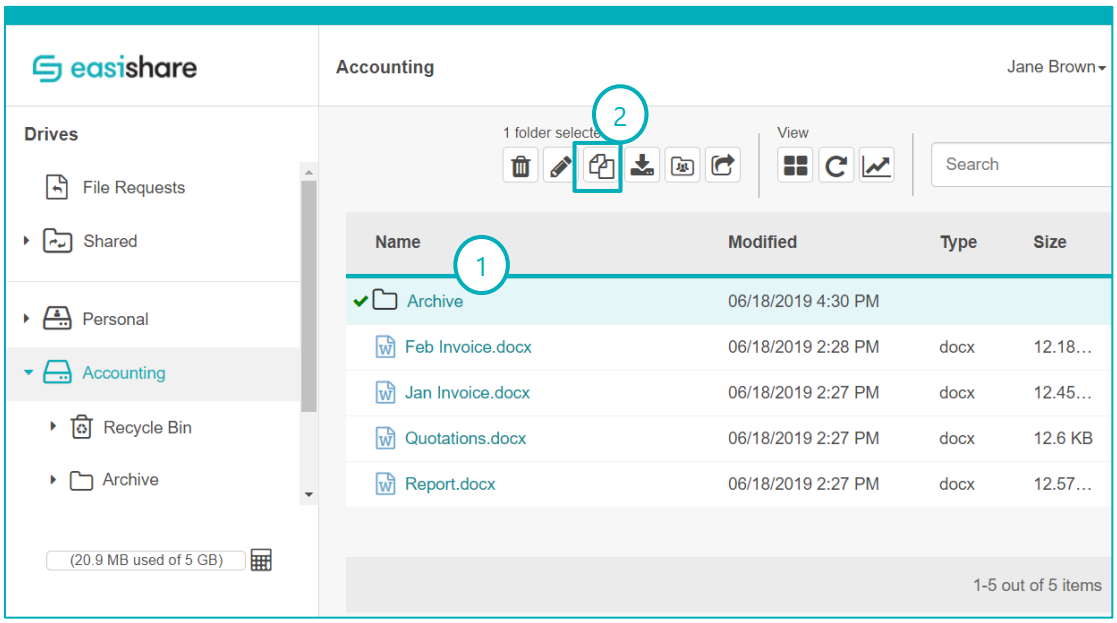
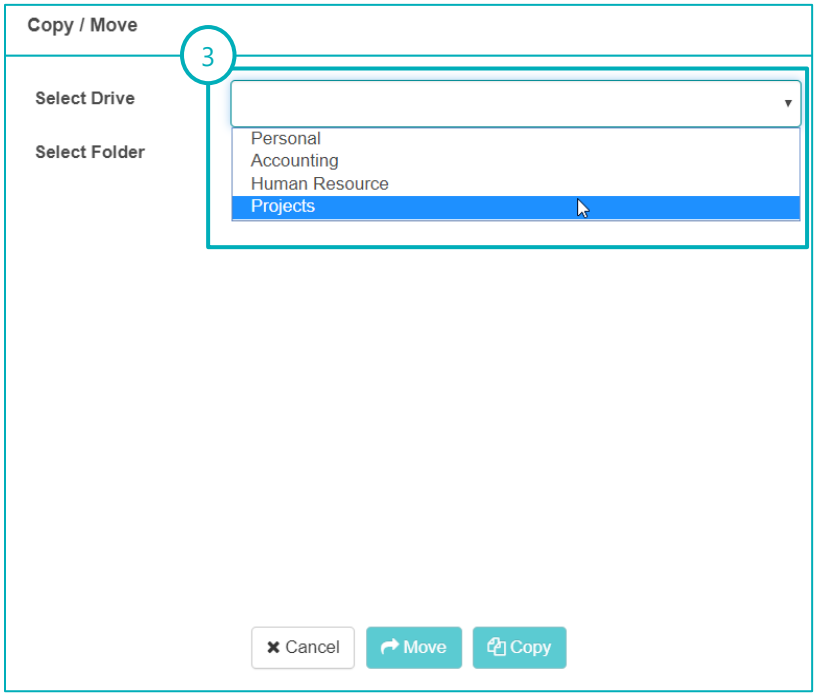


3. Select a drive in the **Select Drive** drop down list.



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

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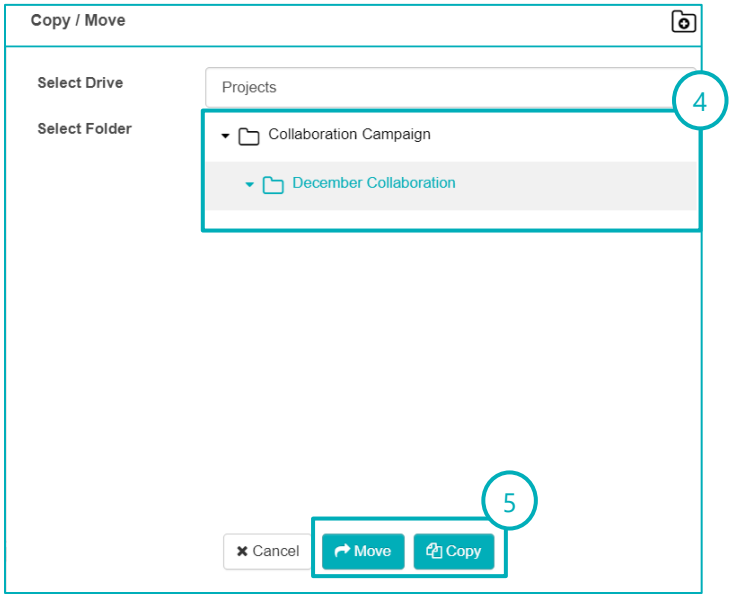

Note: Moving a file/folder that is shared may cause the link to break. Recipients may not be able to access such files/folders.

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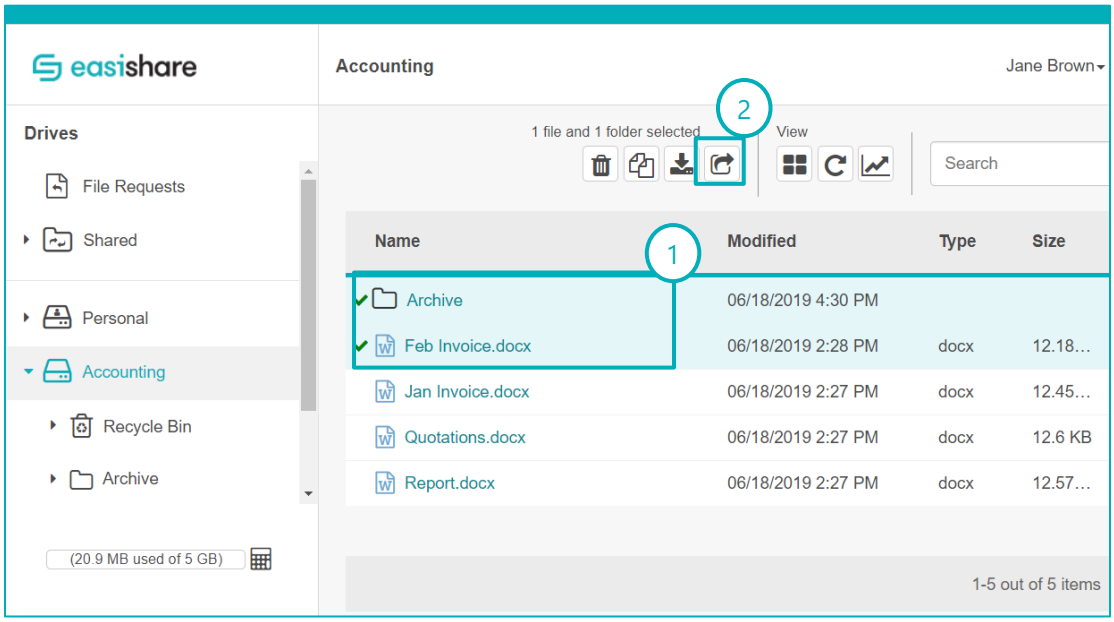
5.3 Download

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.



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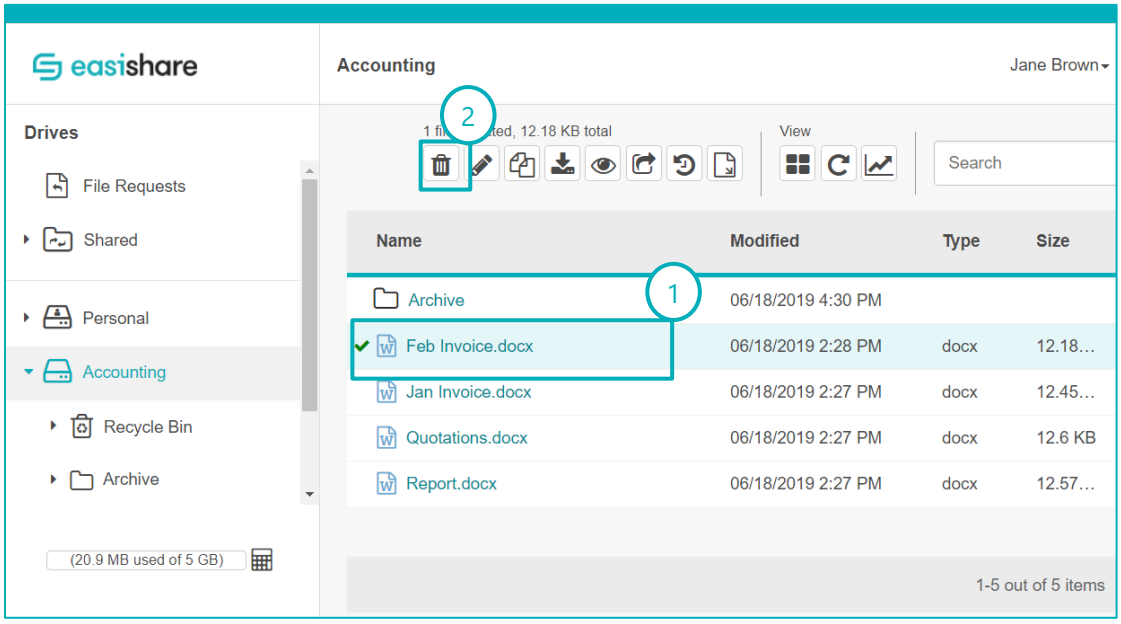
5.4 Delete

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.



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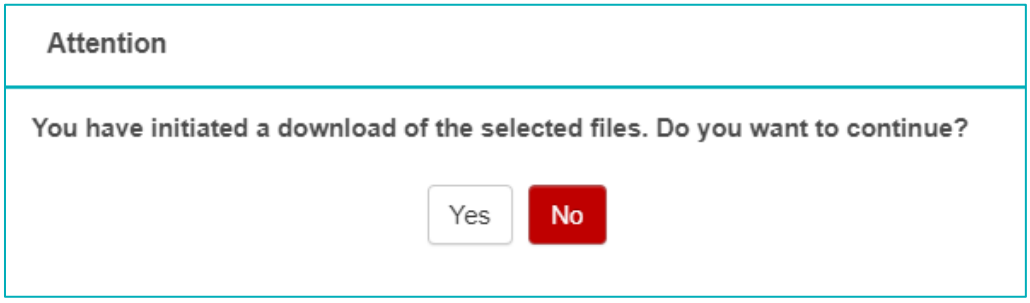
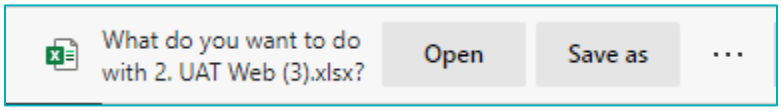
5.5 Recycle Bin

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.)

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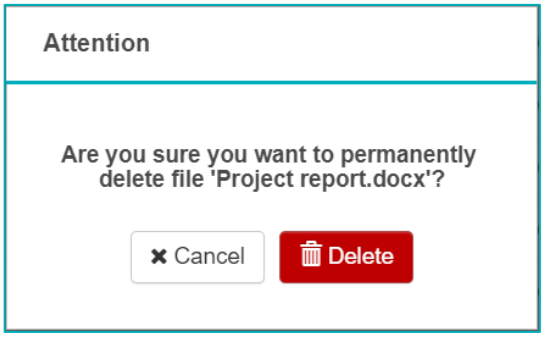

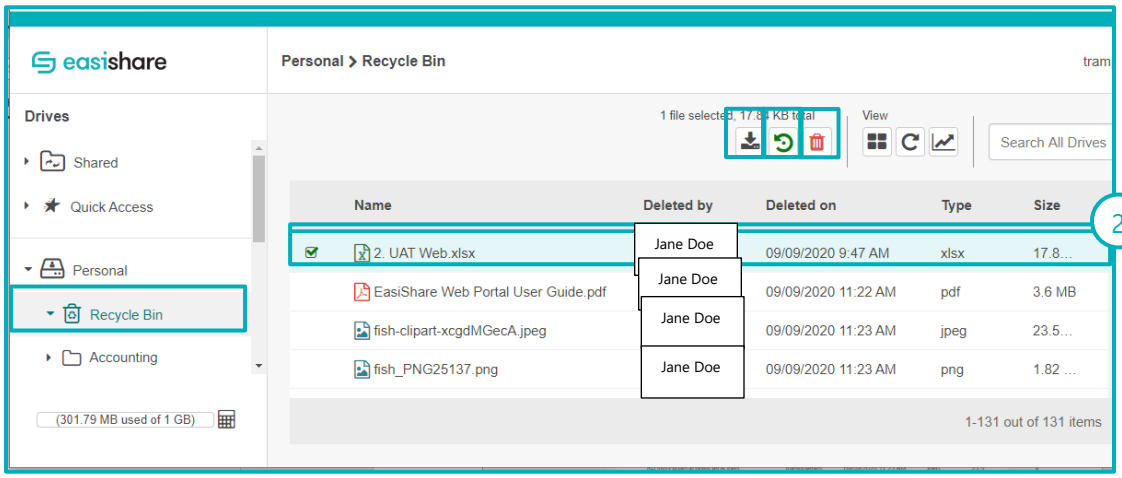

5.6 Preview

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.

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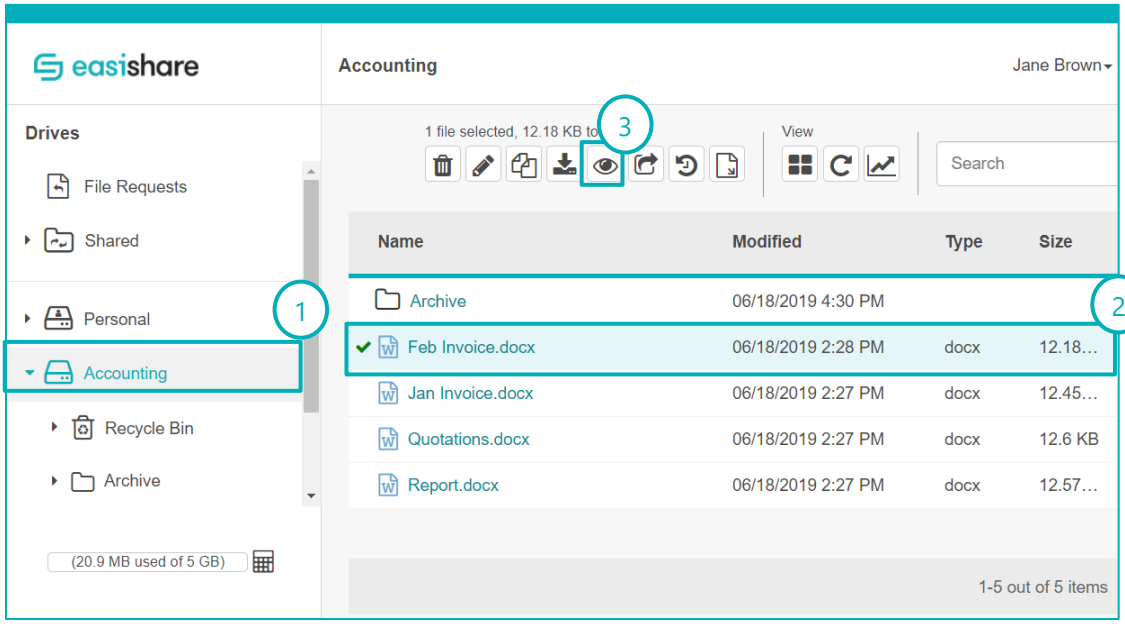

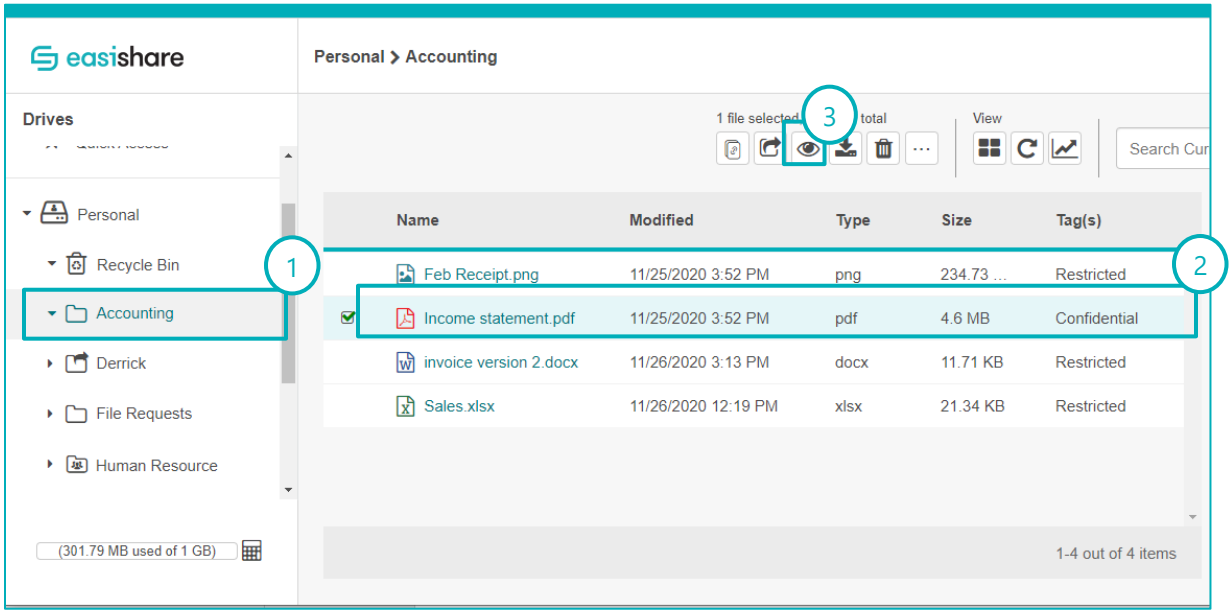

A pop-up box will appear with the preview of the file.

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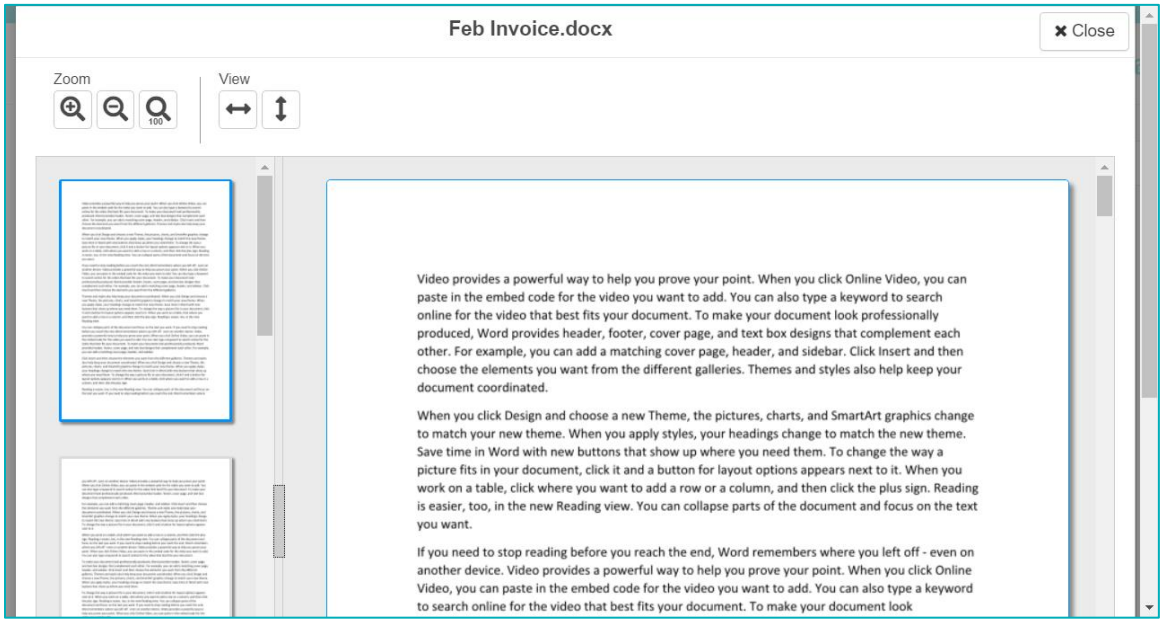
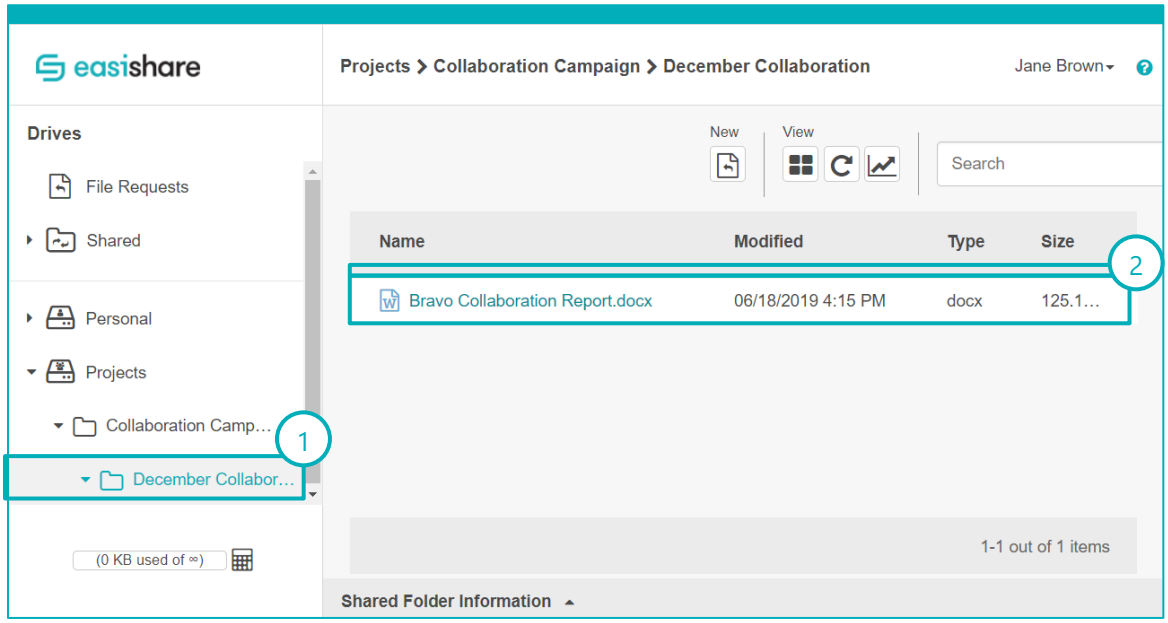


5.7 Preview a file with Viewer Permissions

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.

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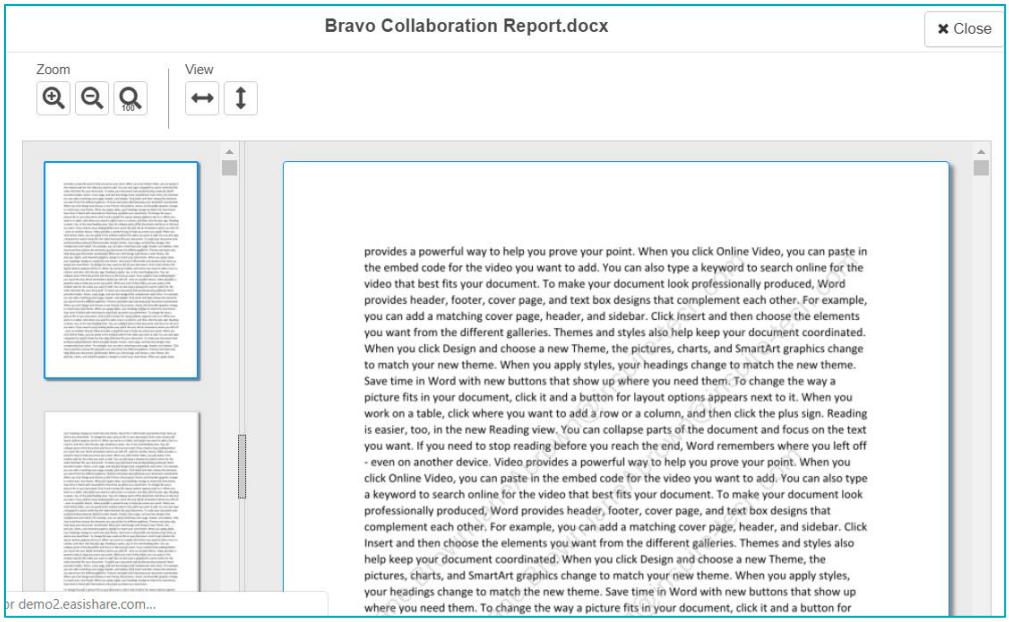

Note: Users with Viewer permissions previewing a file will have a watermark displaying the user's name and email address.

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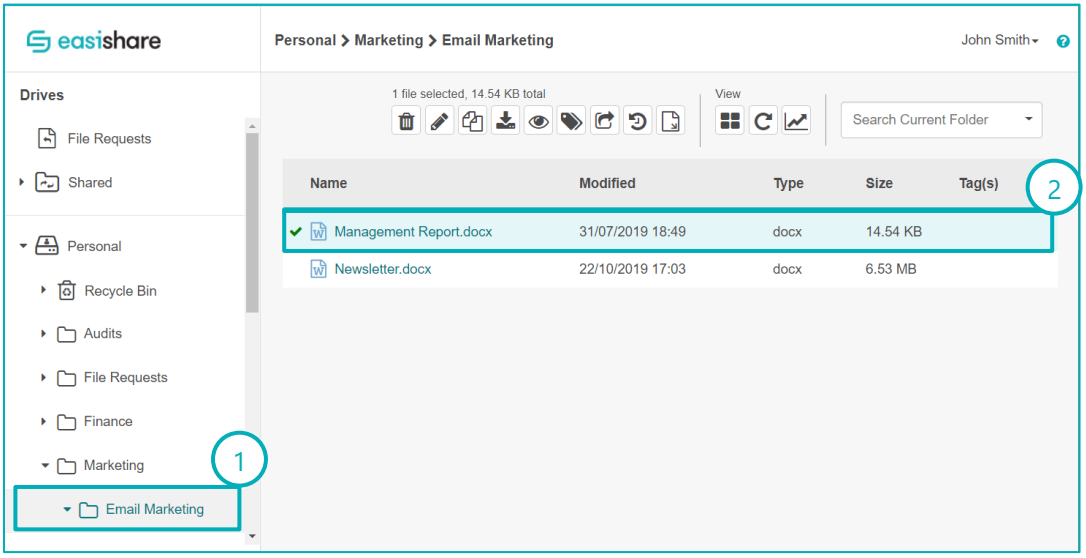
5.8 Document Tag

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.

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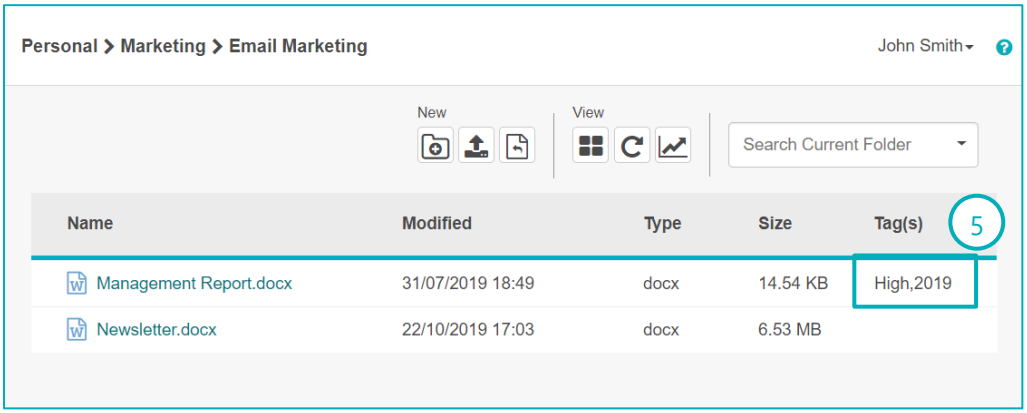
5. Click on Apply to All and the file will be tagged with the chosen tags.



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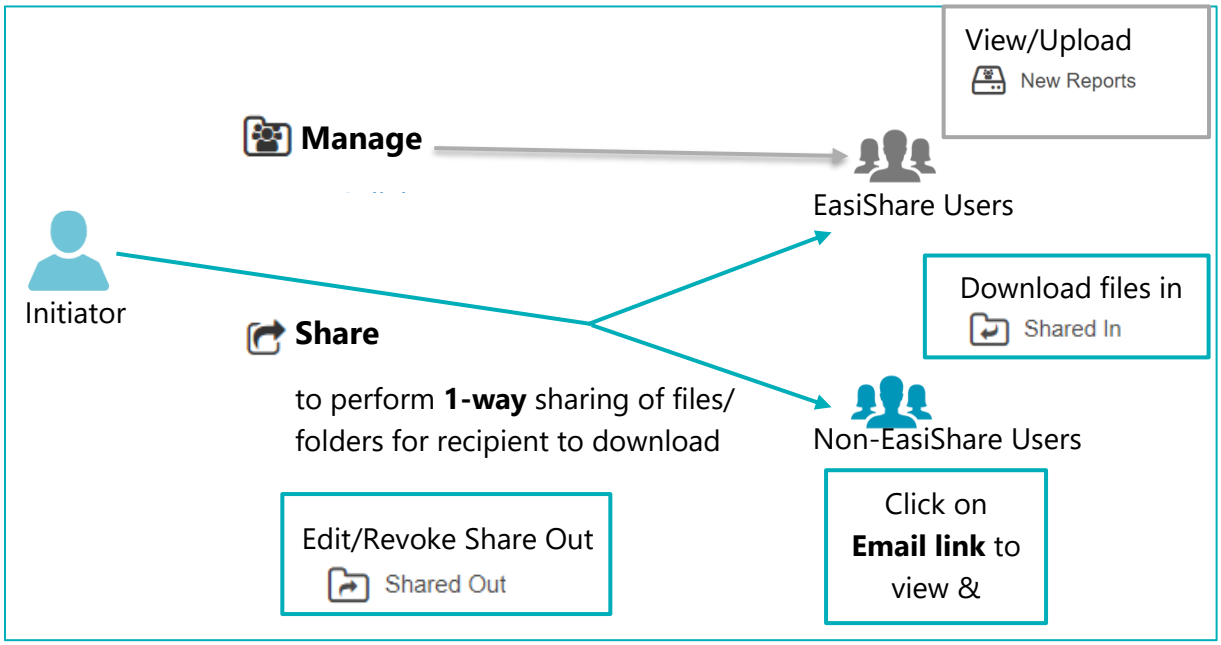
6 Share



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

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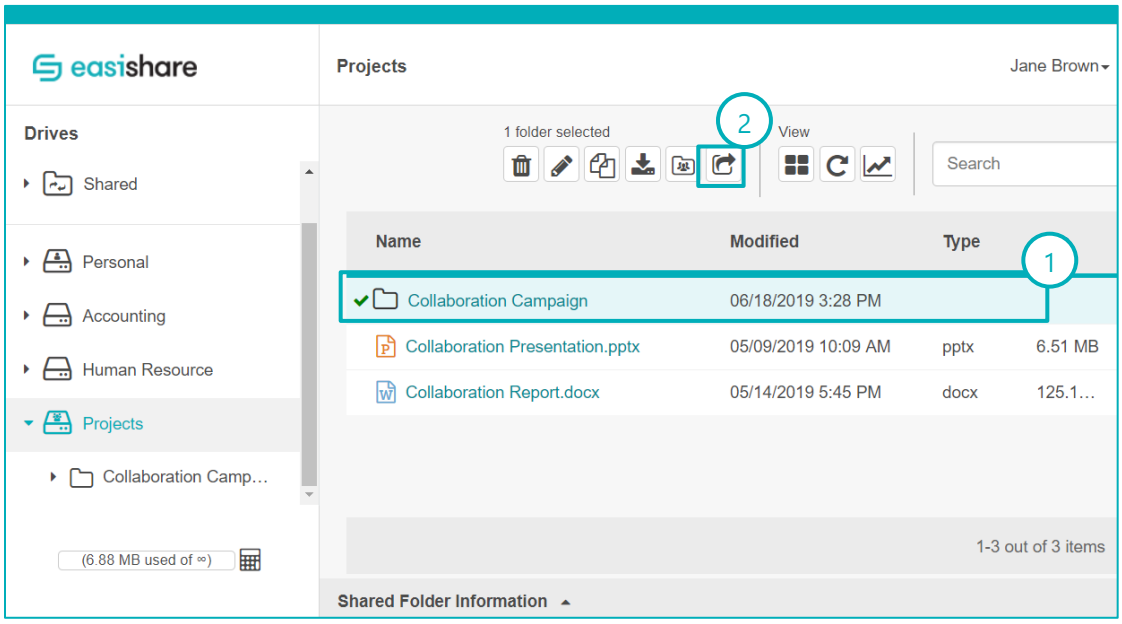
6.1 Share

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.



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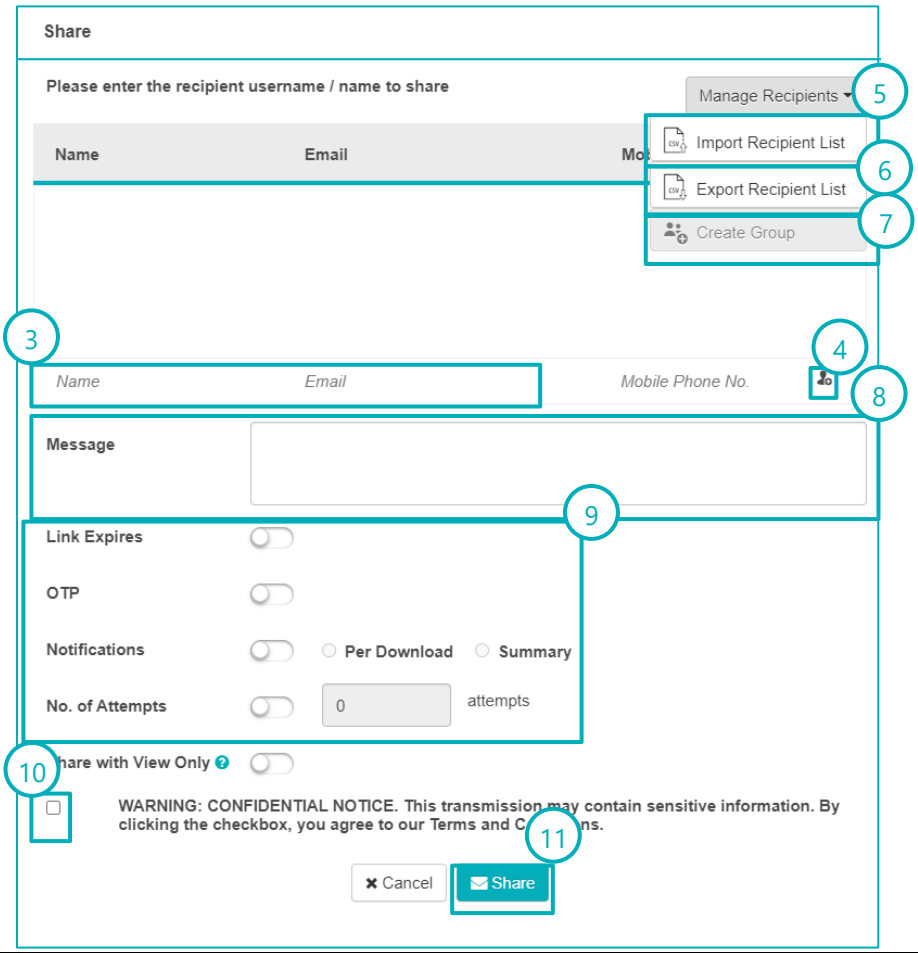
3. Enter the recipient's name, email and/or contact number. Contact number is only mandatory if you wish to enable One Time Password (OTP). Otherwise, you may leave it blank.
4. Click on to confirm recipient. Alternatively, you can press **enter**.
   Tips: After adding the recipient, the **name** and **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**.



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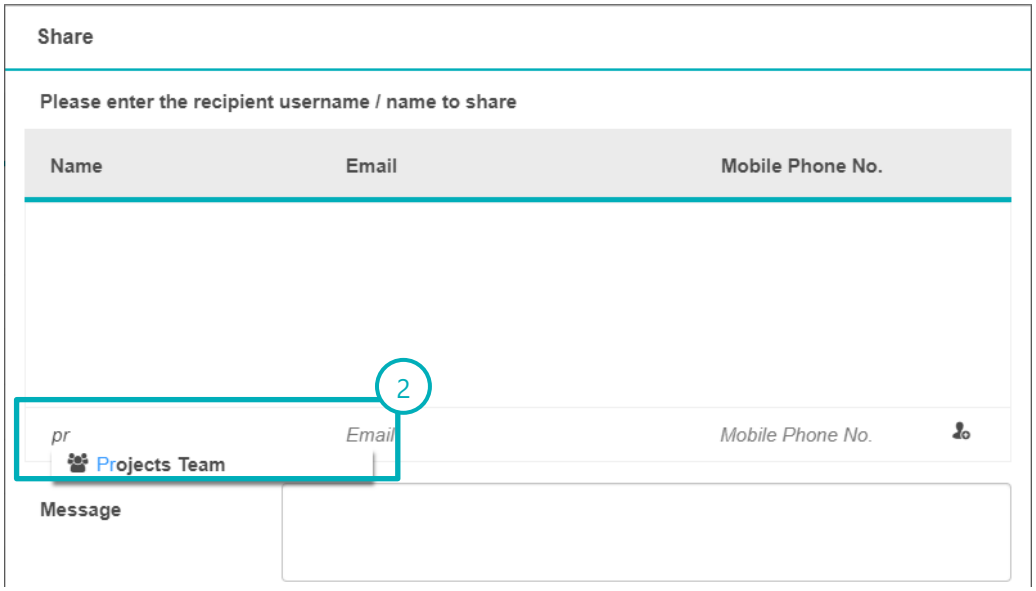
6.1.1 Share with User Group

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



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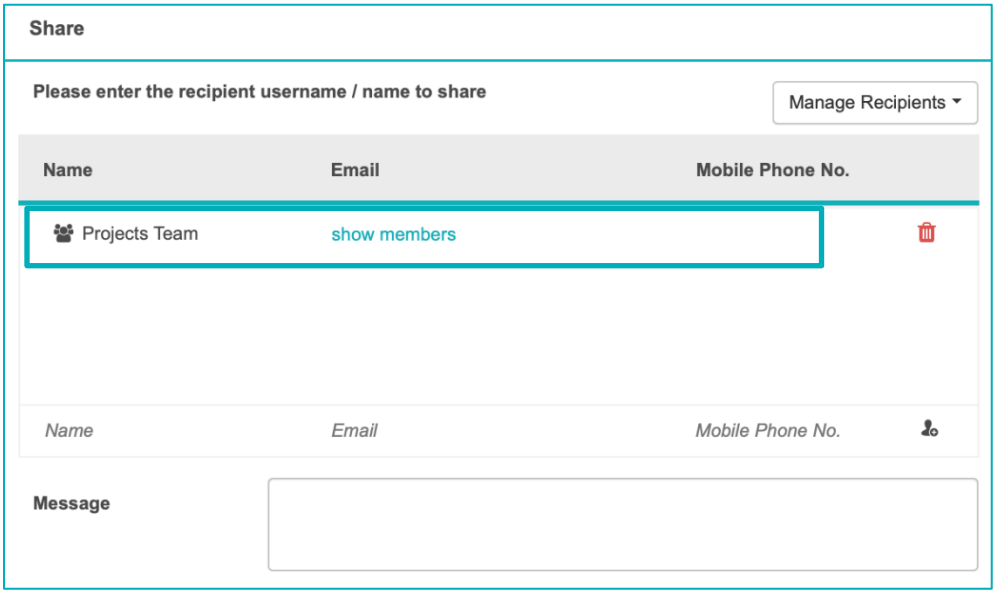

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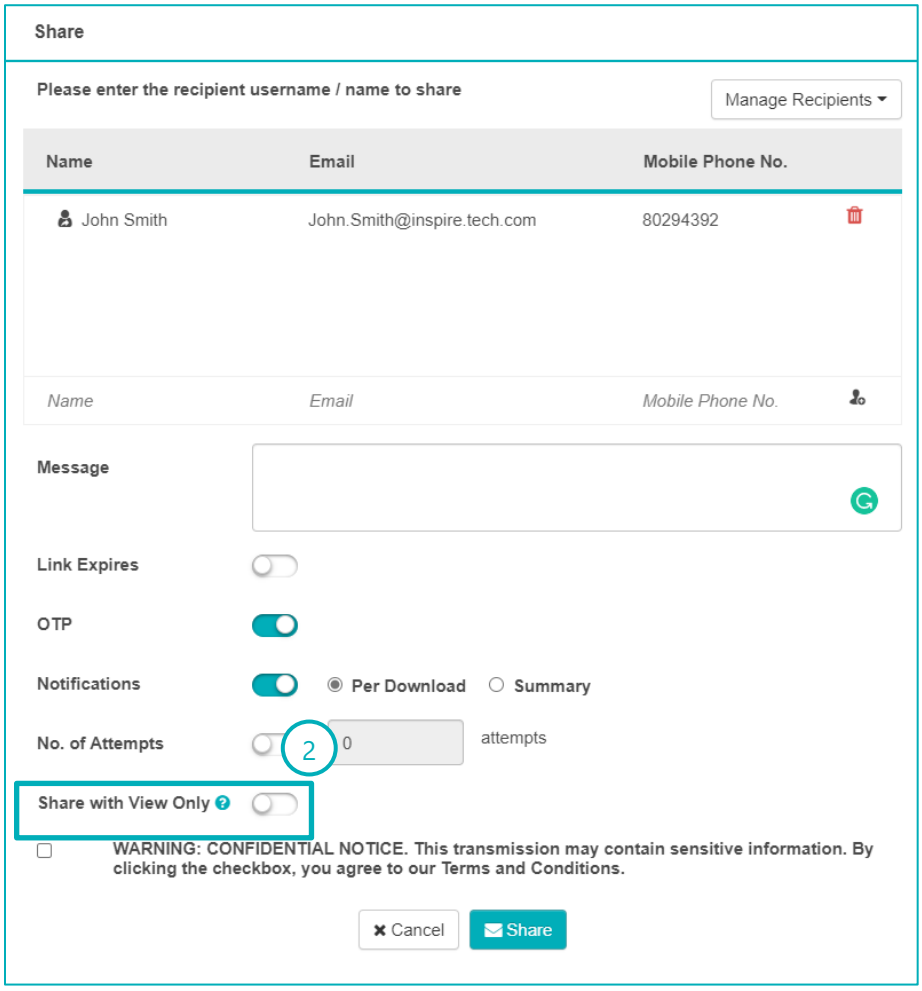
6.1.2 Share with Download Permission

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



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.

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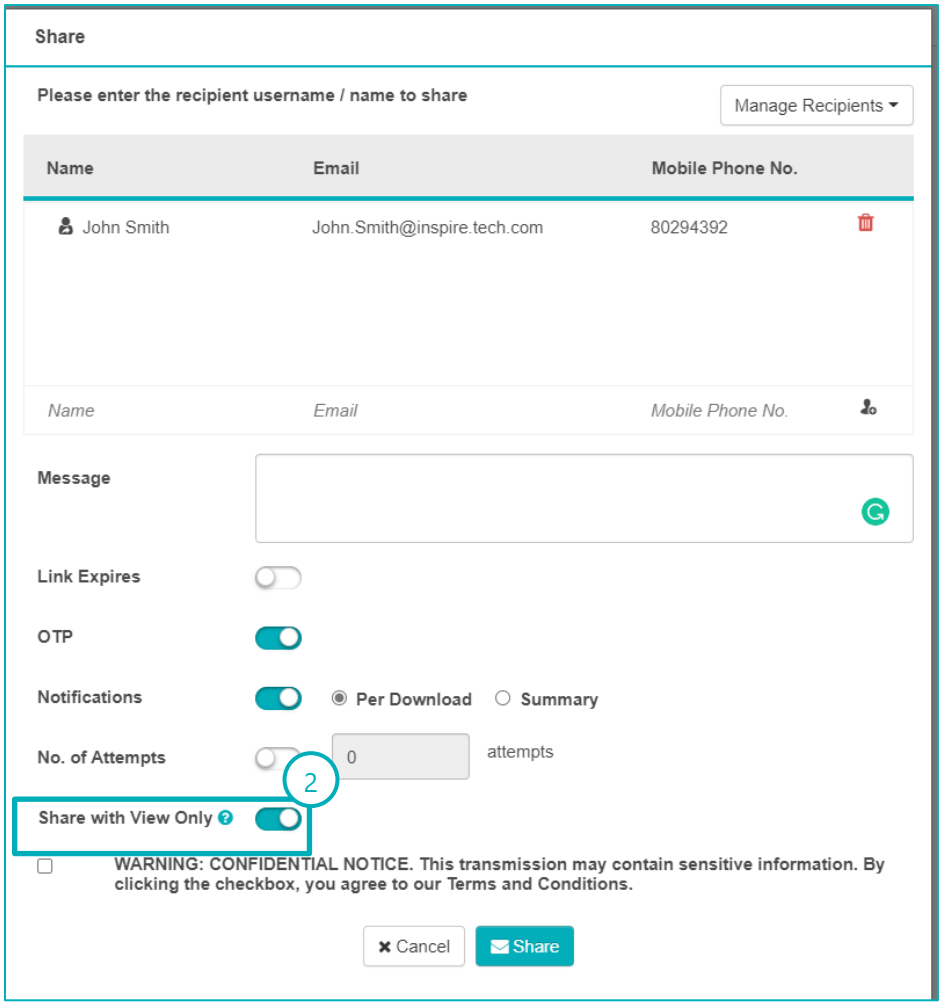
6.1.3 Share with 'View Only' Permission

1. Refer to Section Share to begin sharing.
2. Enable on **Share with View Only**.



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.

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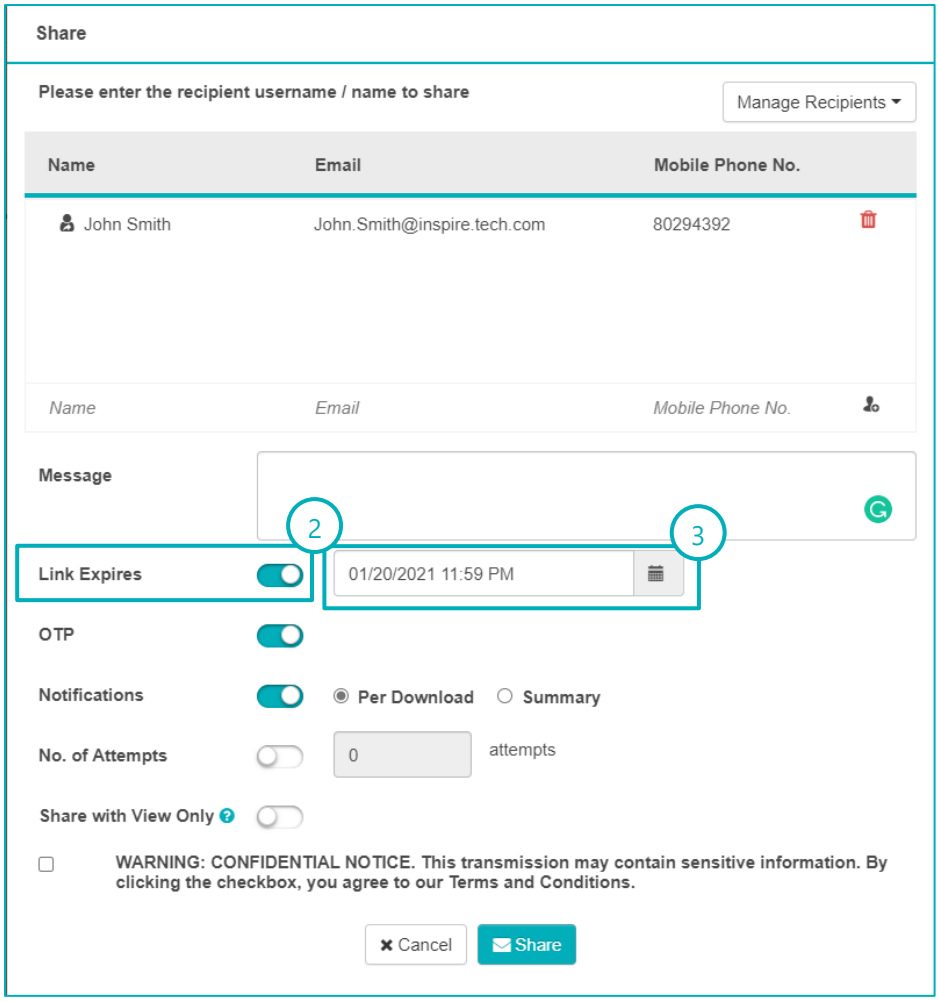
6.1.4 Share with Link Expiry

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



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.

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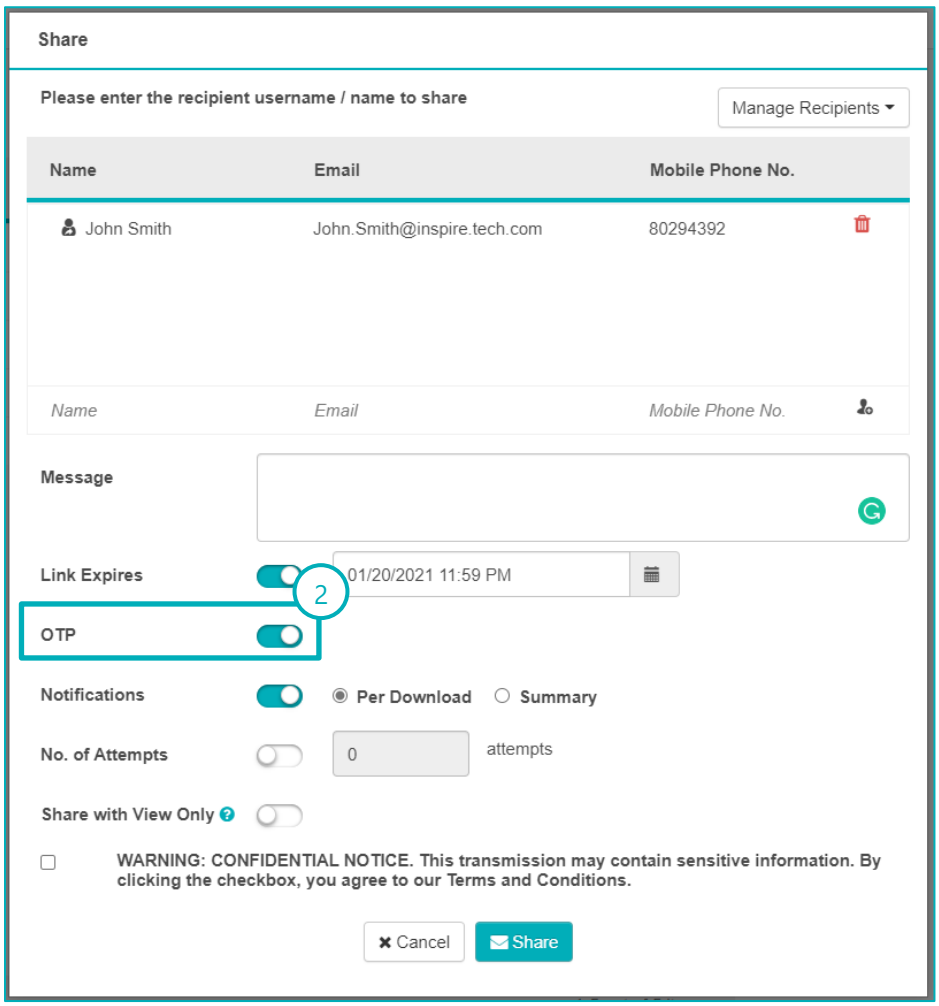
6.1.5 Share with One Time Password (OTP)

1. Refer to Section Share to begin sharing.
2. Enable **OTP**.



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.

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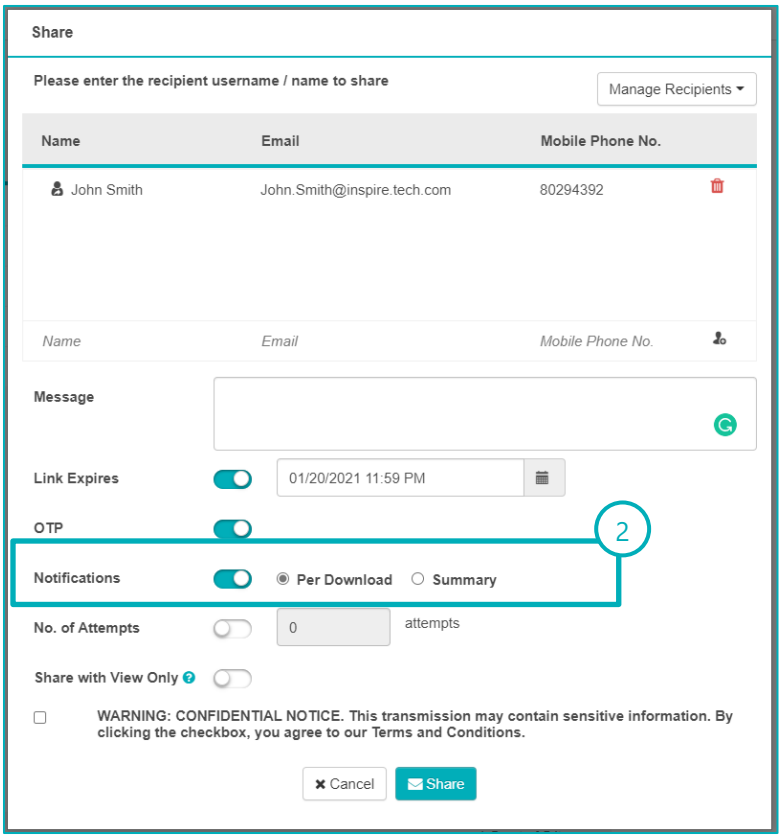
6.1.6 Share and Receive Notifications When Users Accessed the File/Folder(s)

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.



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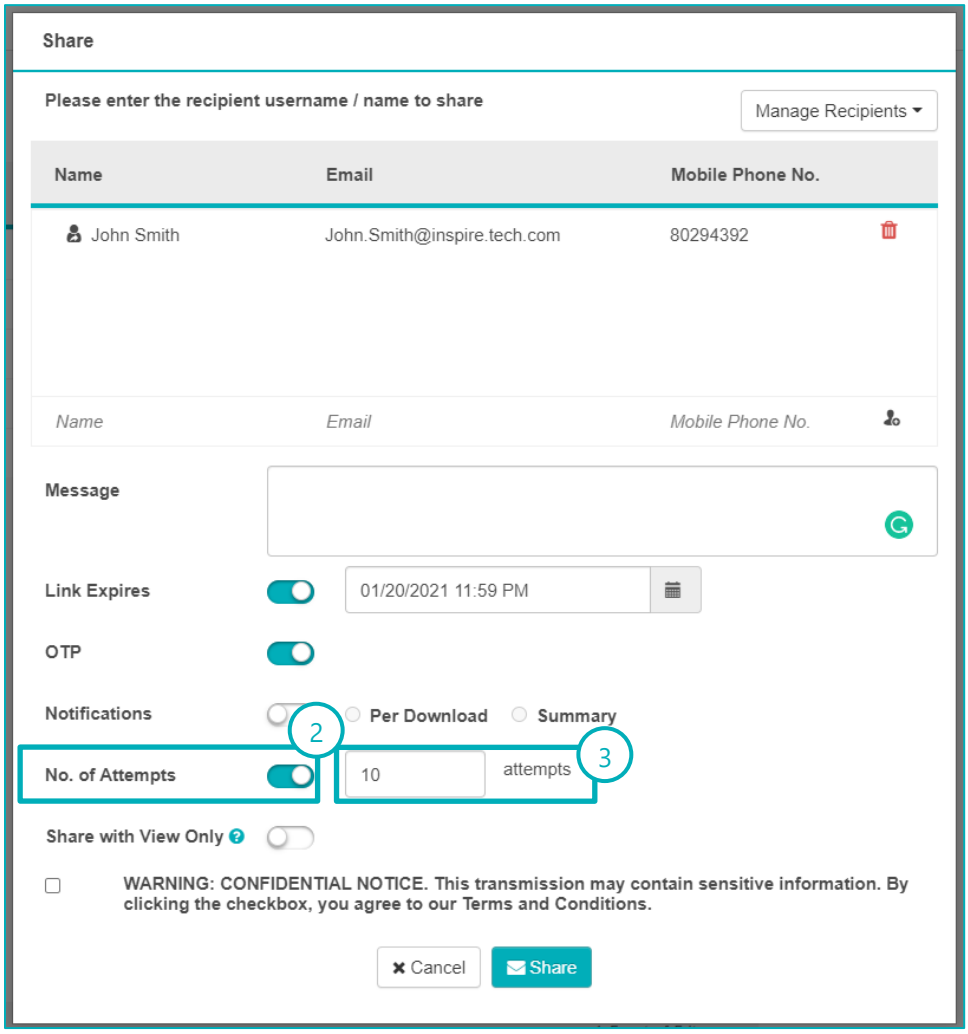
6.1.7 Share with Number of Download Attempts

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



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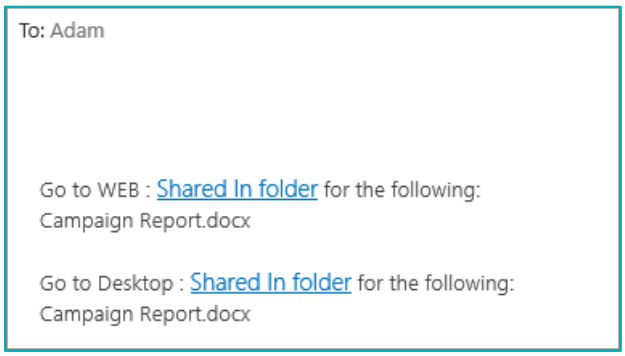
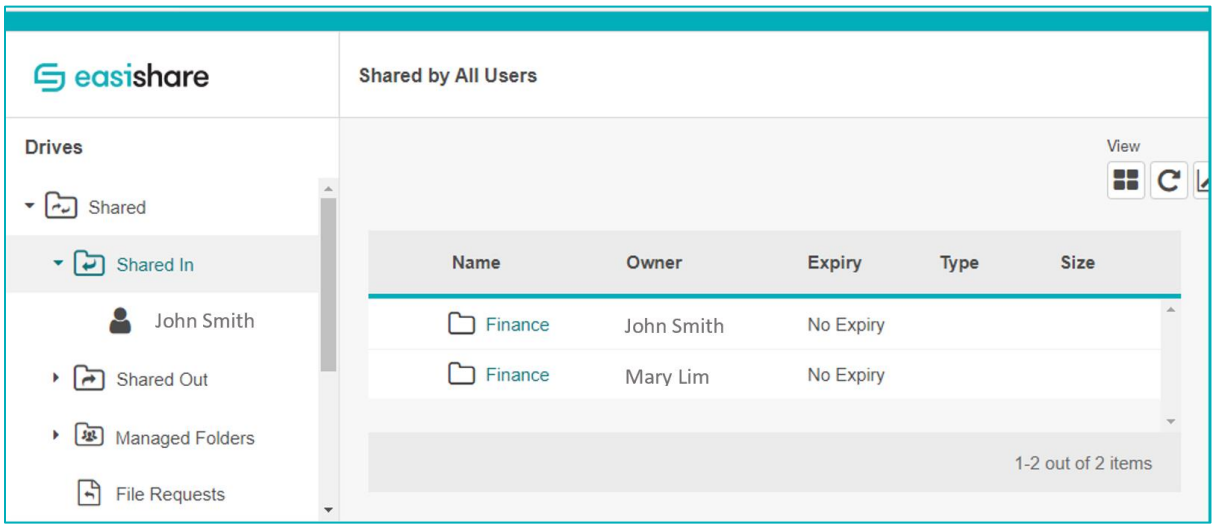
6.2 Access Shared Files/Folders

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.



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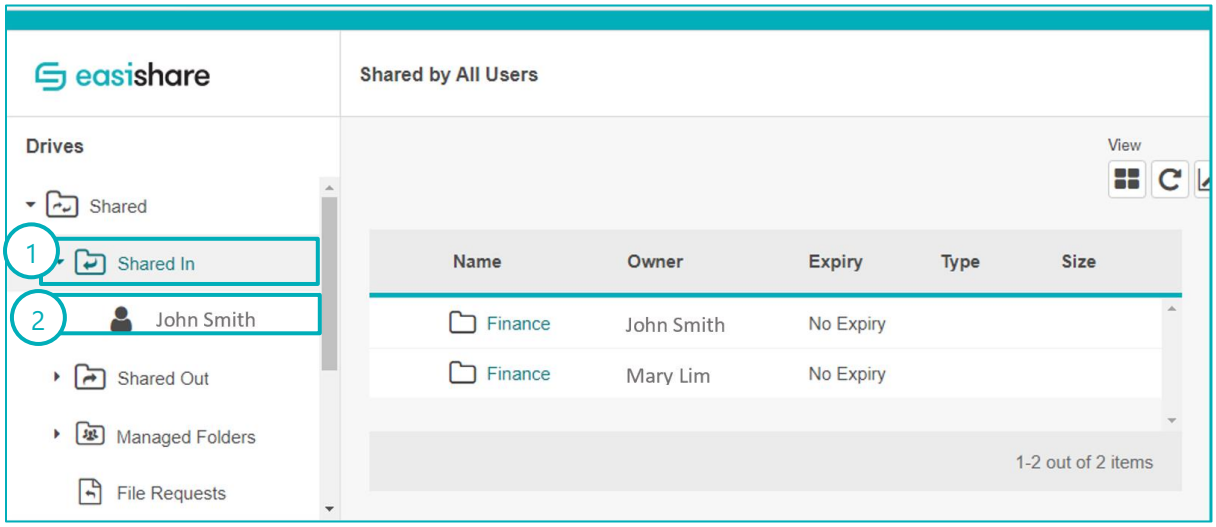
6.2.2 Shared In

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**.

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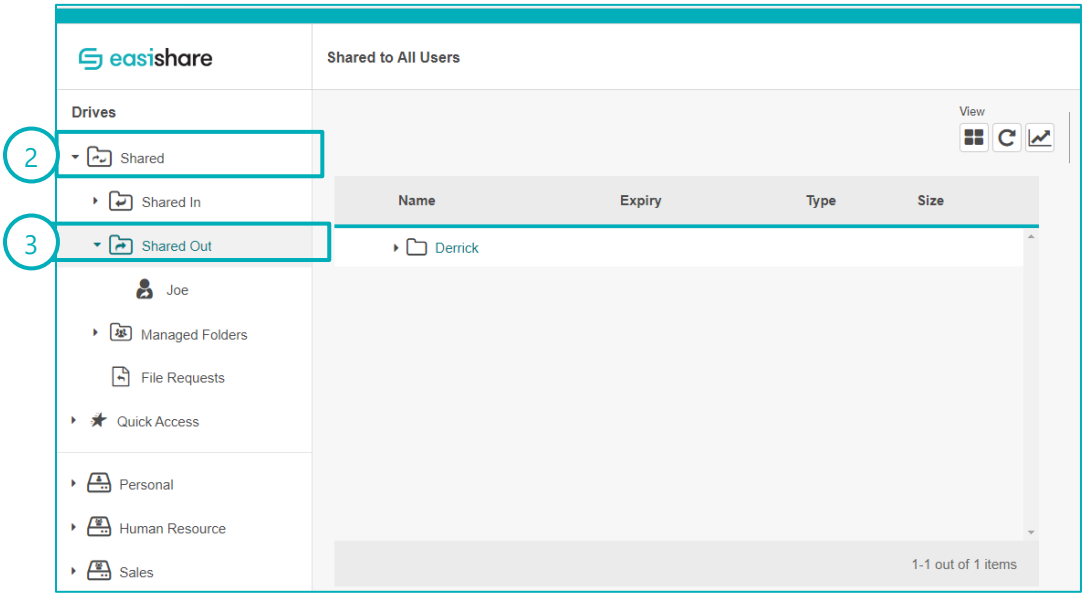

Note: External users refer to users who do not have a registered account in EasiShare.

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** .

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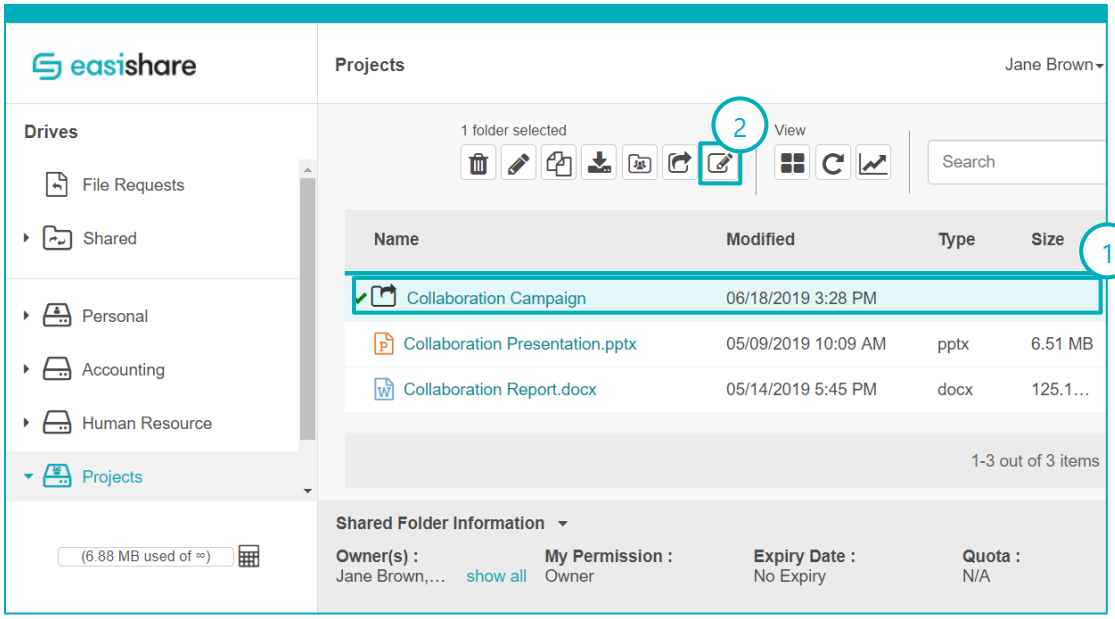
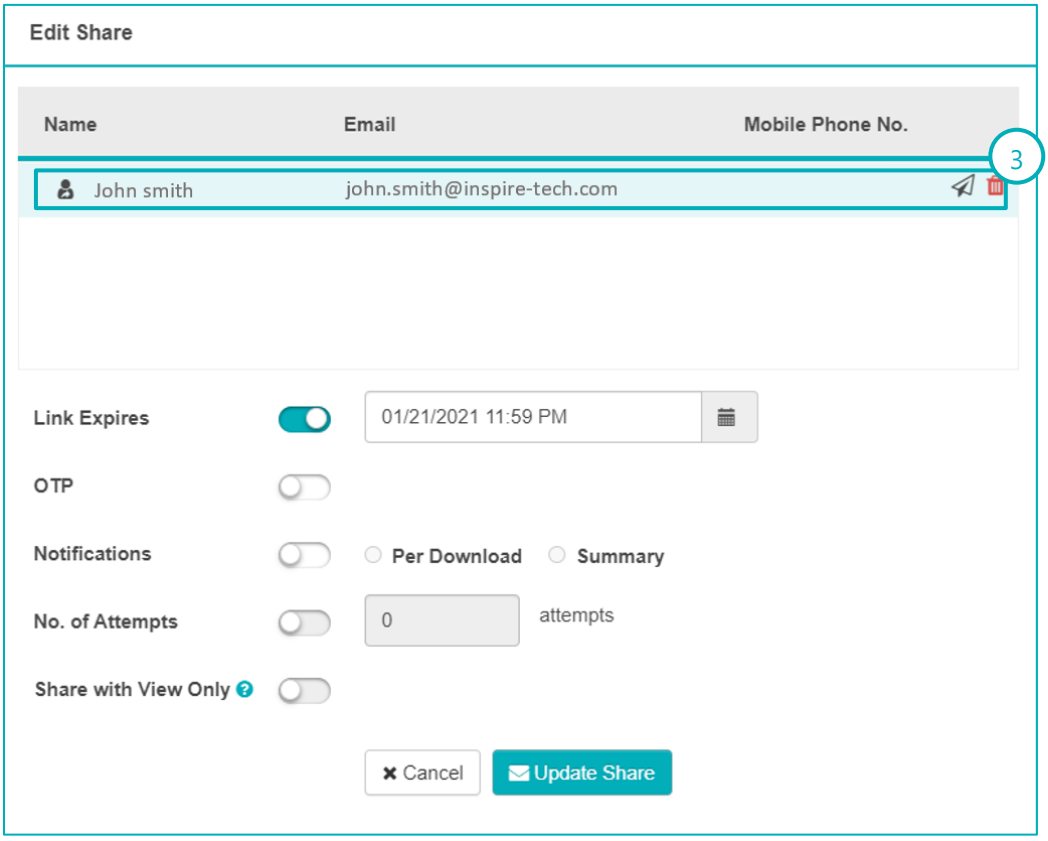


3. If you wish to change the link expiry date/time or turn off the notification for specific recipients, select the recipient you wish to apply changes to by clicking on the white space beside the recipients' name.



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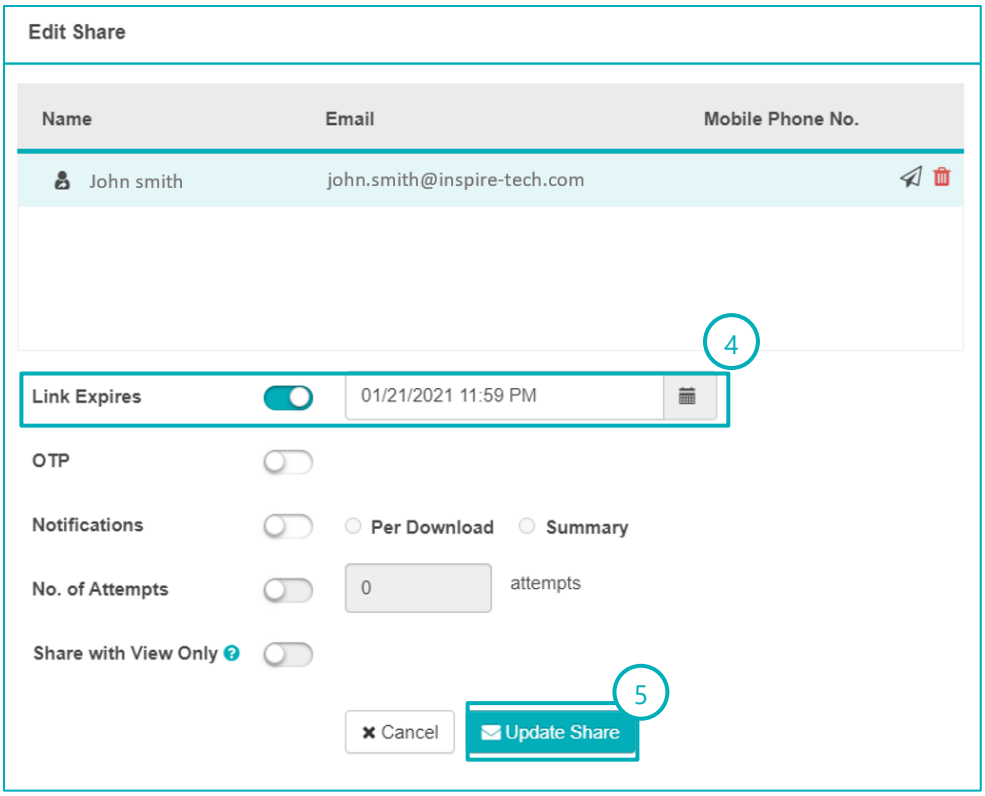
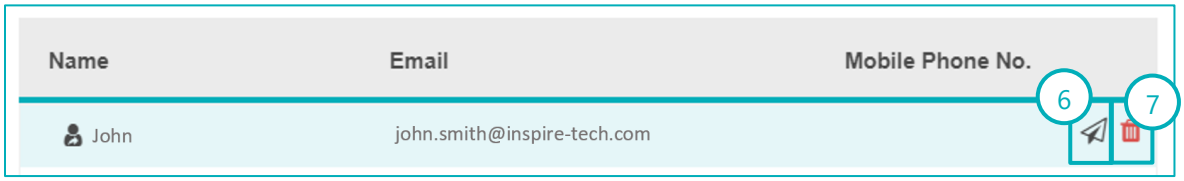
4. Apply the changes by enabling/disabling the features or changing the date and time of the link expiry. To find out in details how each feature works, refer to the respective sections above.
5. Click **Update Share** to confirm the actions.



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.



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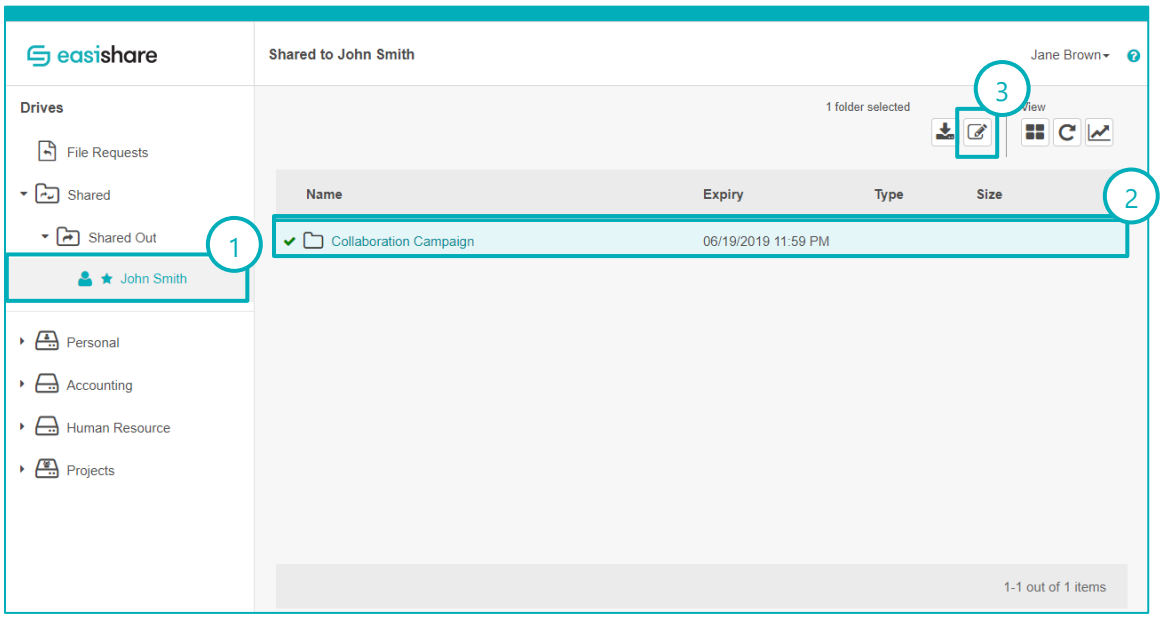
Note:

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.



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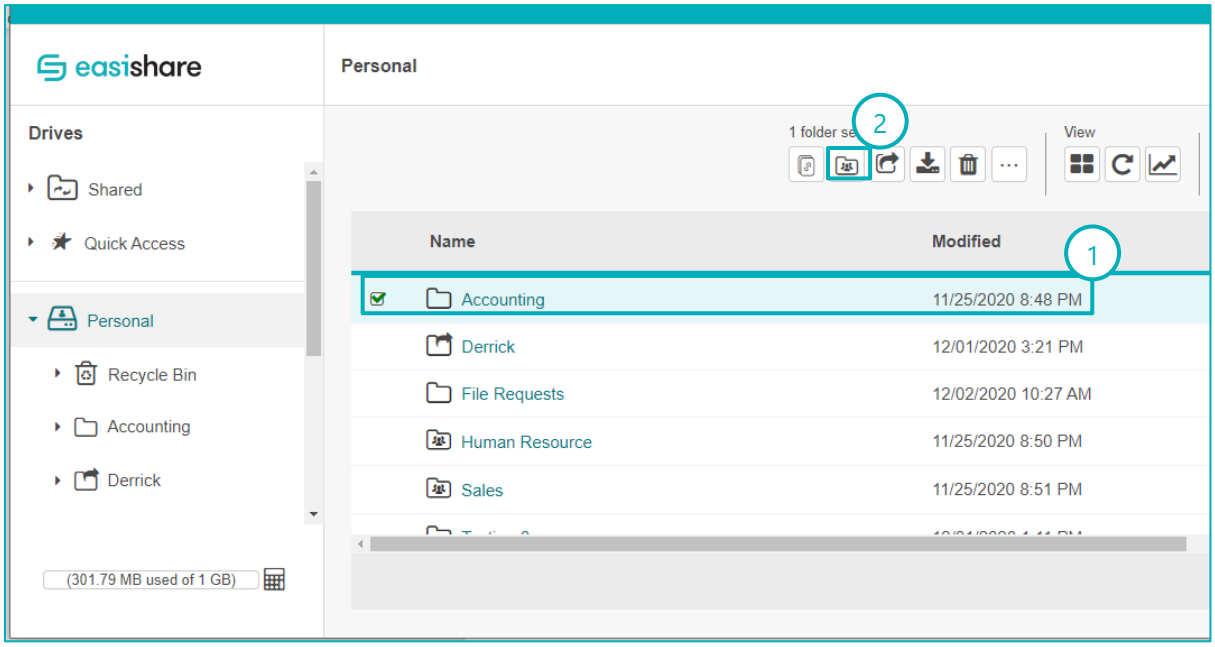
7 Manage Folder to Collaborate with Internal Users

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.



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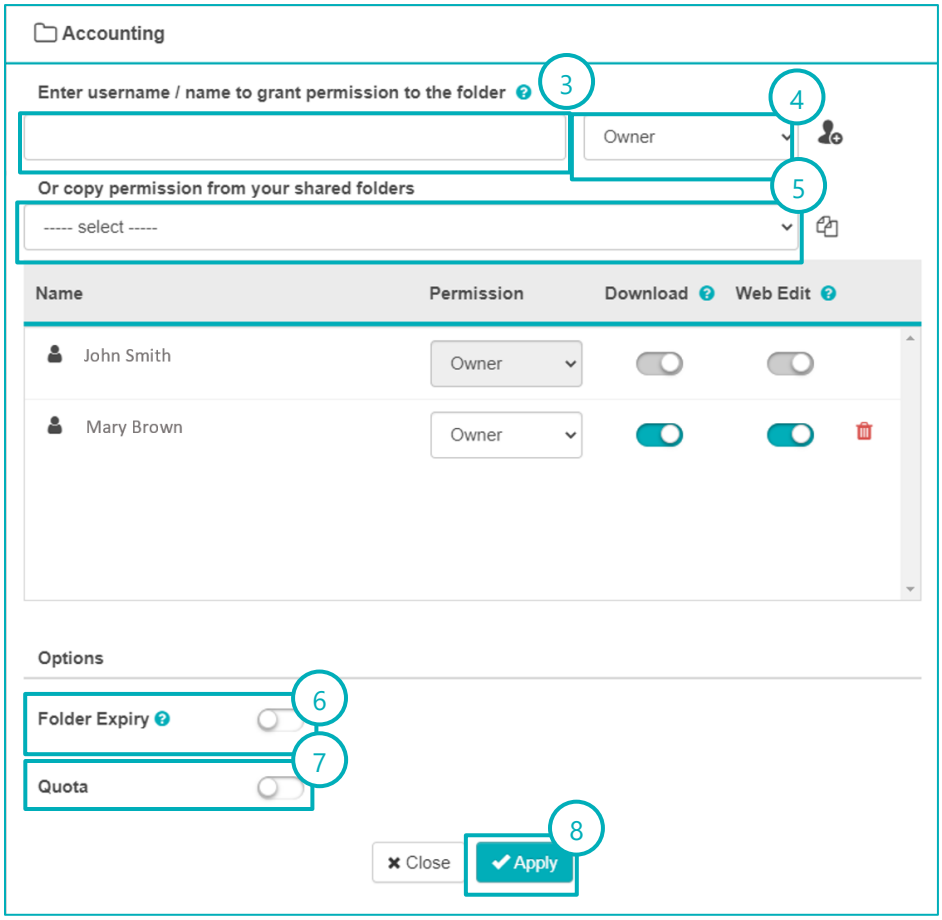
3. Enter the recipient name.
4. Assign the permission type you wish to give to the user and click on icon.
5. If you wish to copy permissions that has already been set from another folder, select the folder name from the dropdown list and click on the copy icon.
6. Enable/disable **folder expiry** if 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.



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Note:

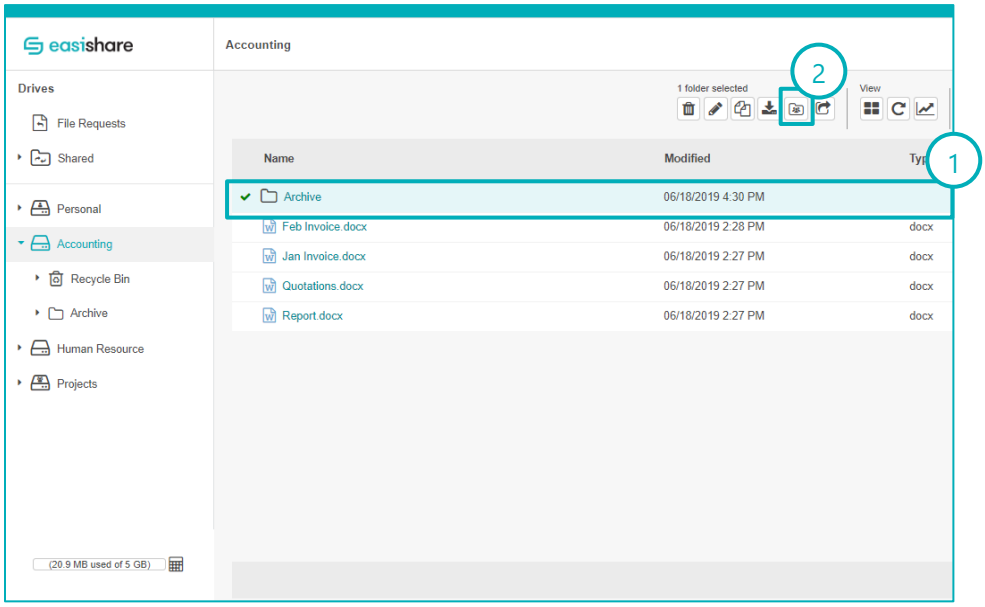
1. If the folder expiry is enabled and auto-delete is selected, after the folder expires and a pre-defined number of days set by your central administrator, the folder will be automatically purged by the system.
2. Some features may be controlled by your central administration system. If you are unable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

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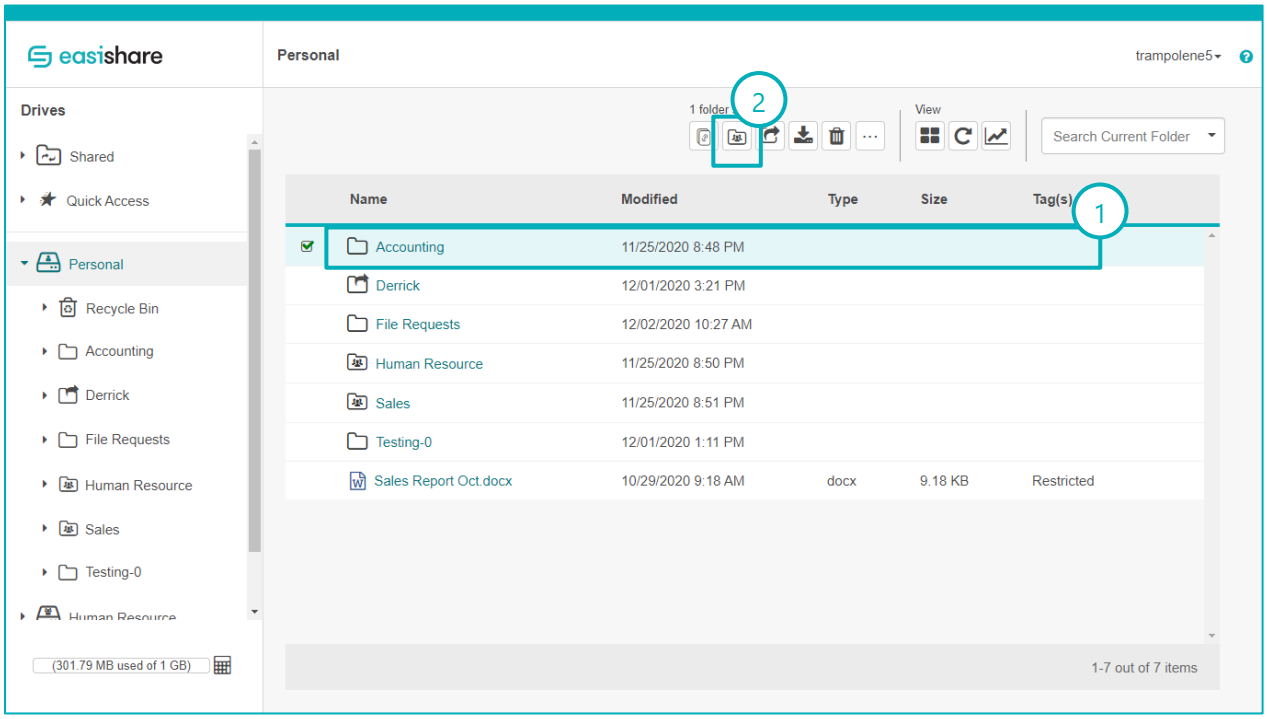
4. Enable/disable folder expiry or quota as it ought.
5. For existing users, you may wish to change the permission assigned by selecting a different permission type.

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.

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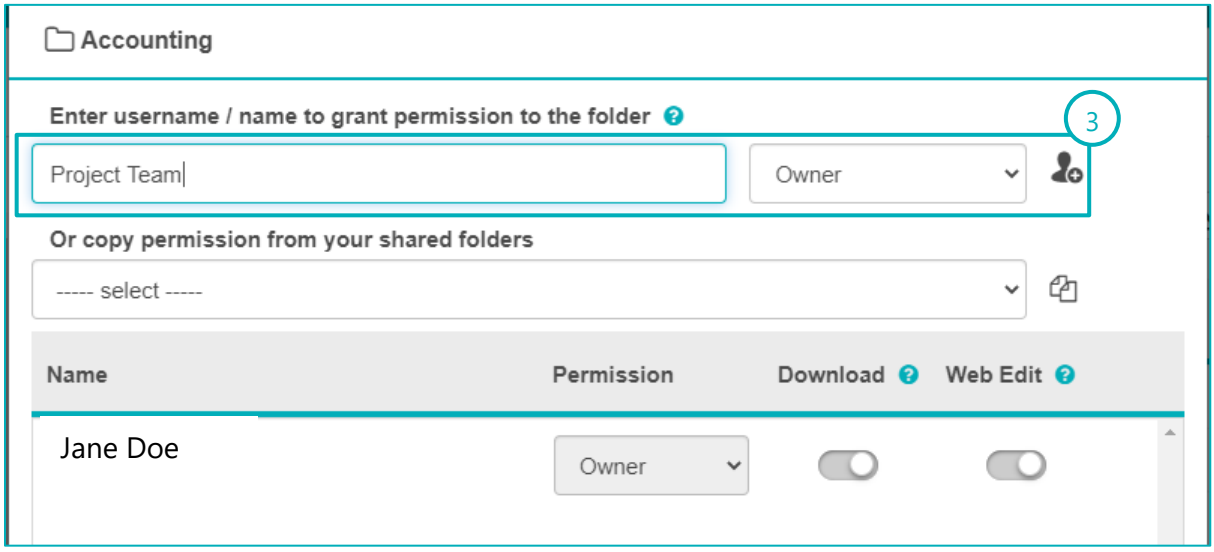
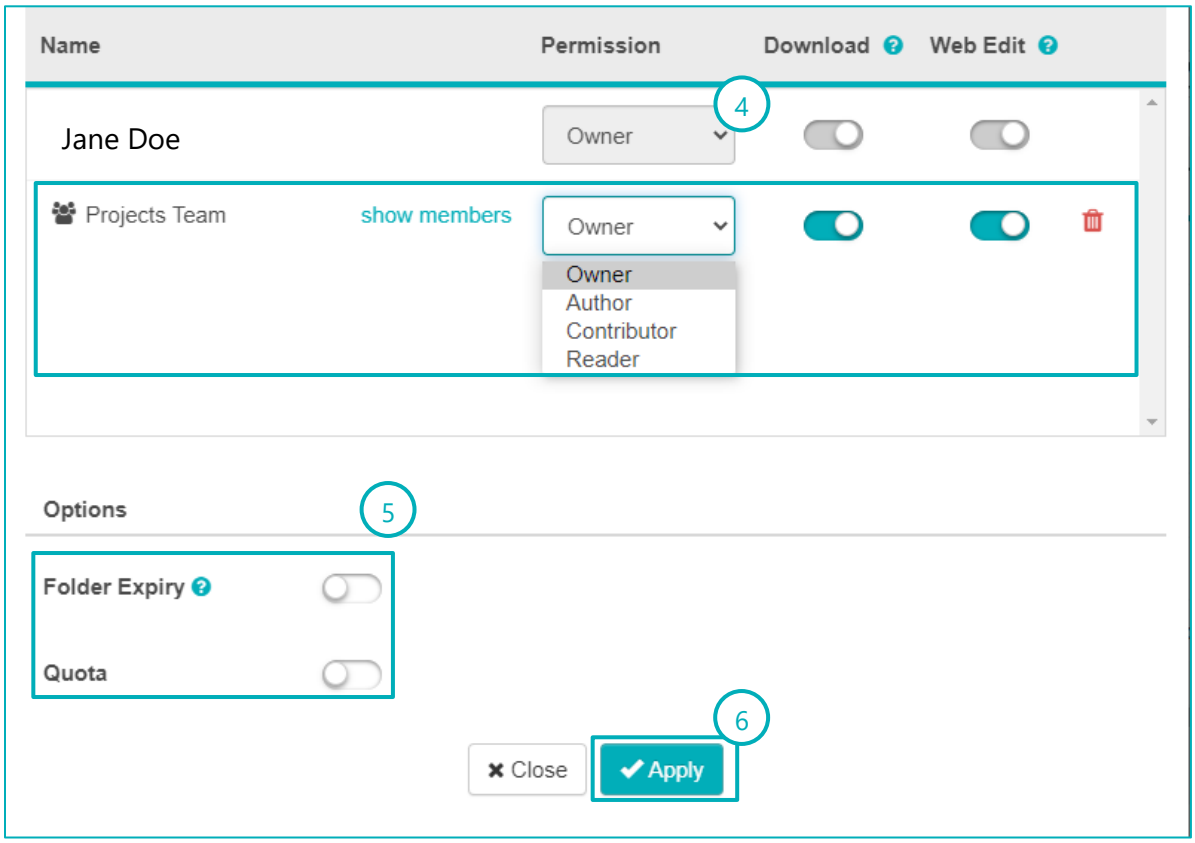


4. For existing users, you may wish to change the permission assigned by selecting a different permission type.
5. Enable/disable folder expiry or quota as it ought.
6. Click **Apply**.



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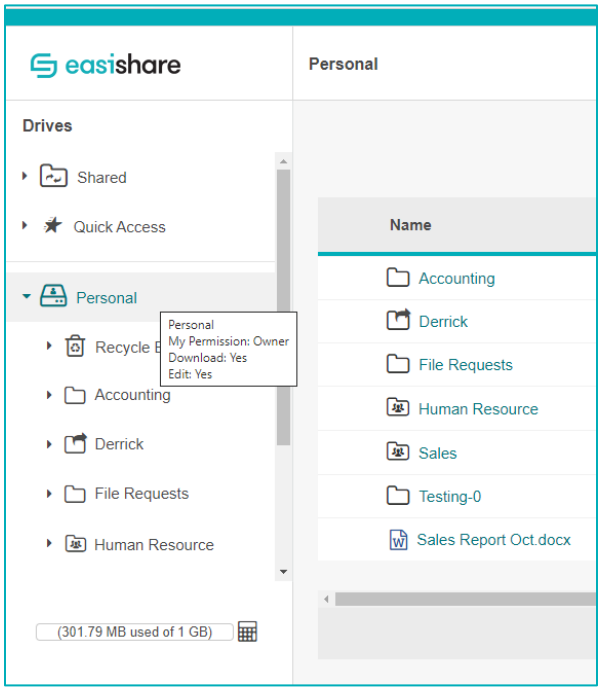
7.5 Manage Drive Permission

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.

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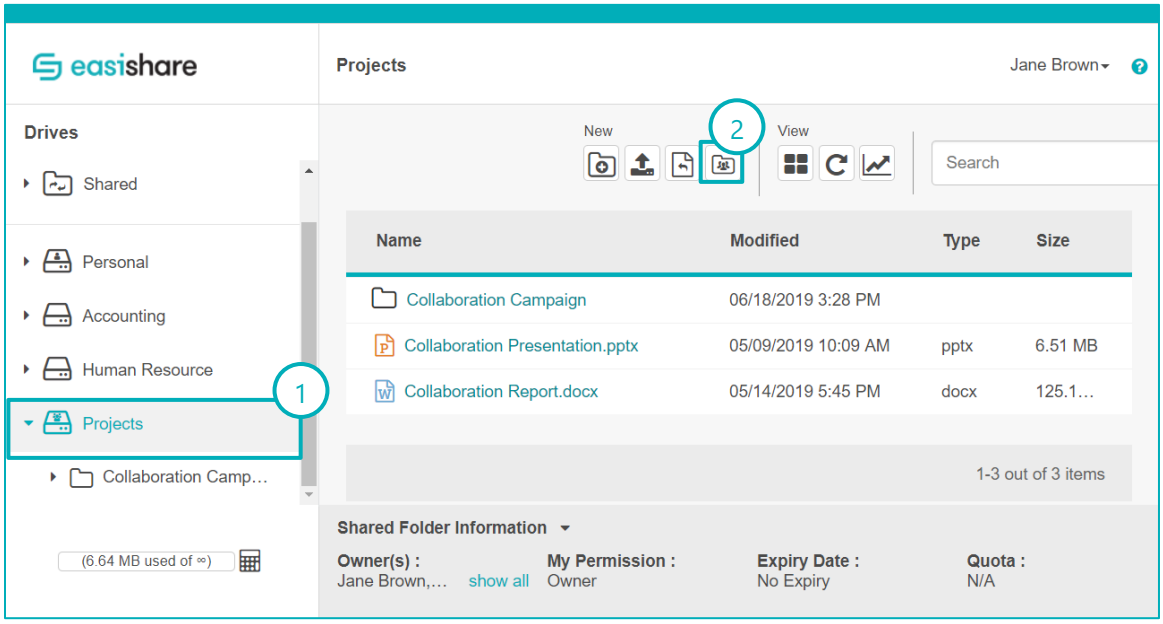

7.6 Access Shared Drive

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.

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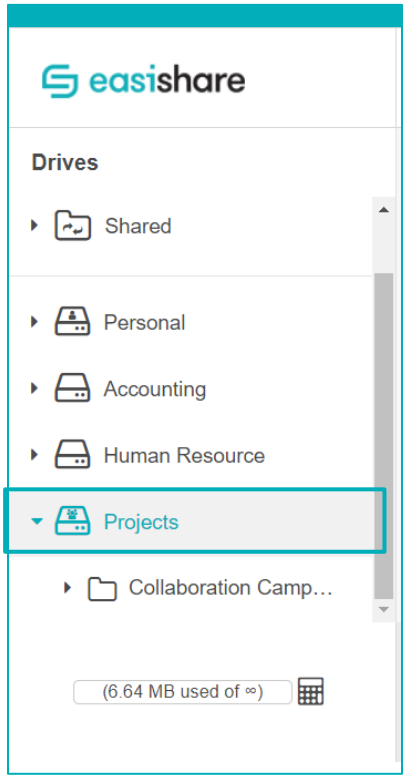

Note: Internal users refer to users who have a registered account in EasiShare.

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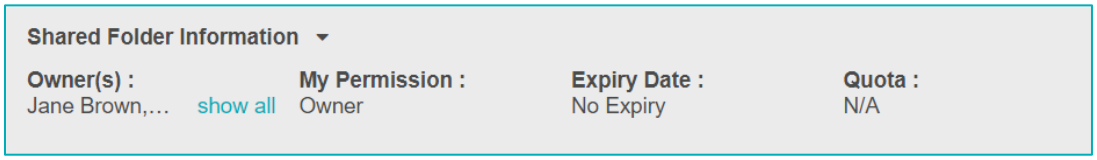
7.7 Shared Drive Information

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



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

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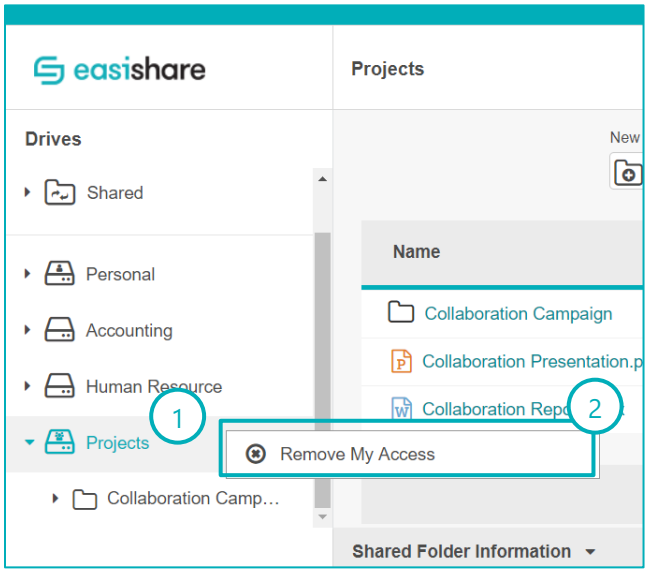
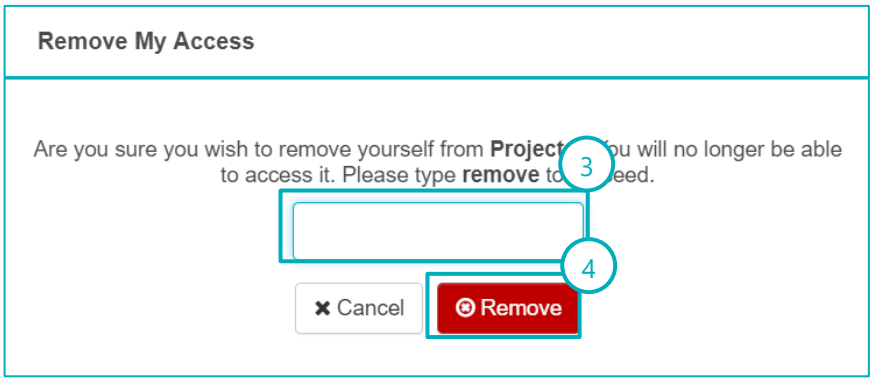
7.8 Remove My Access from Shared Drive

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**.





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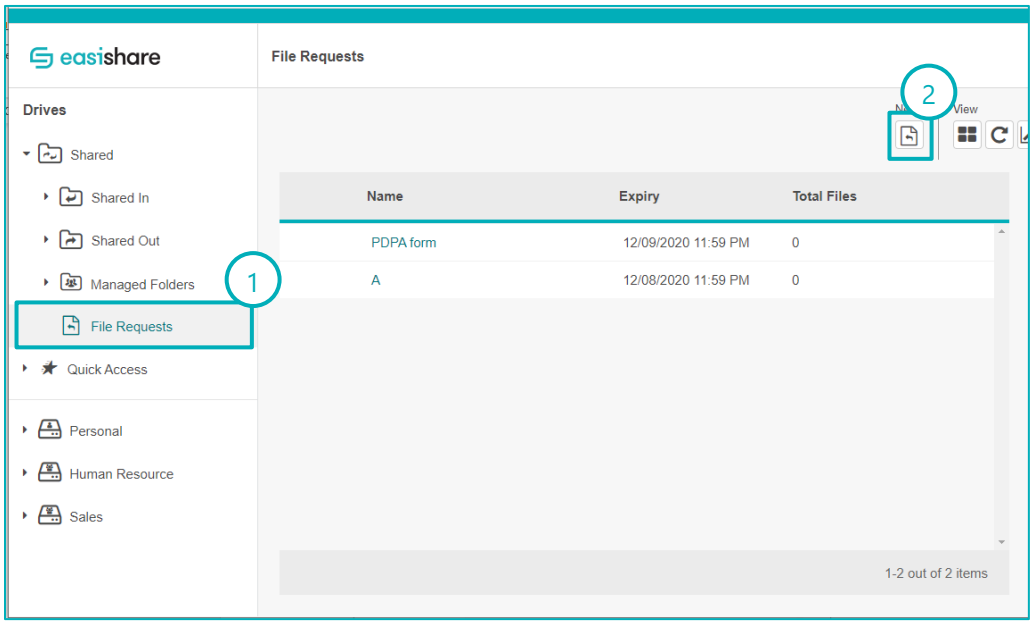
8 File Request to Receive Files from External Users

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.

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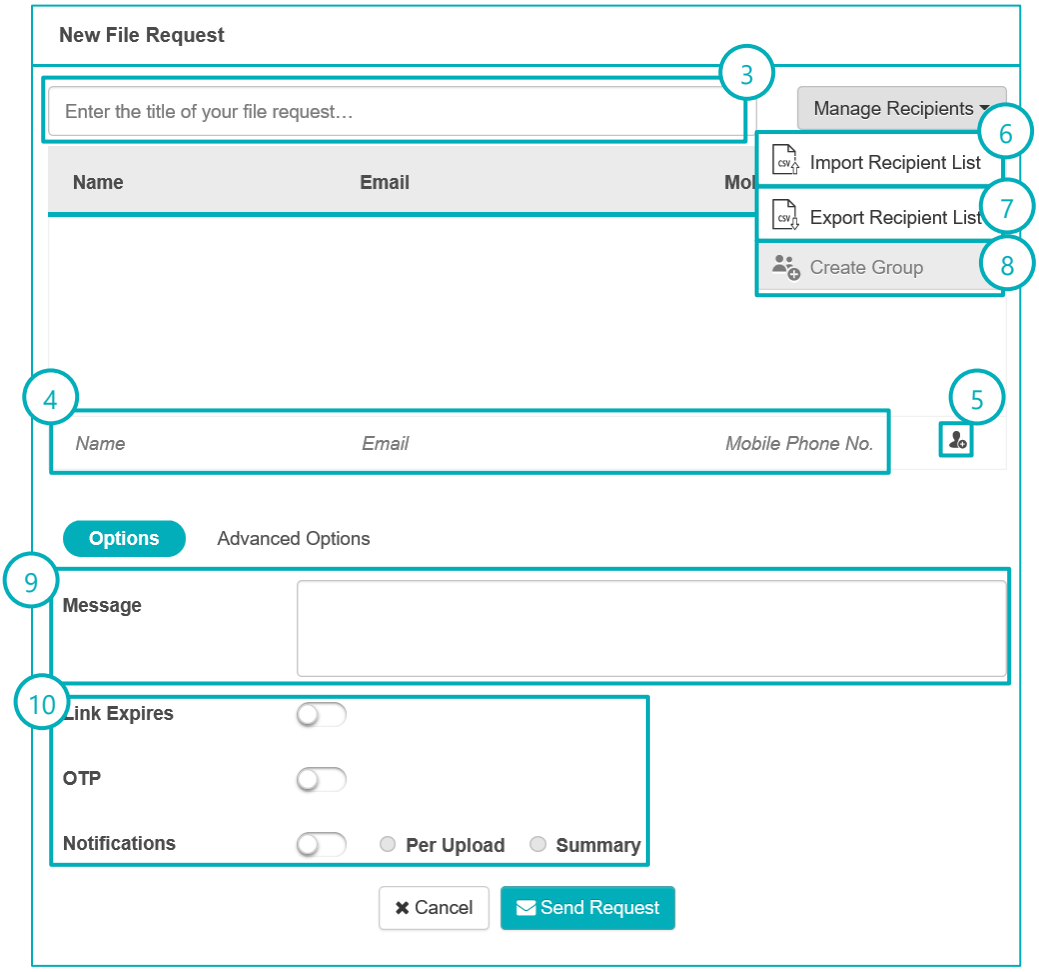

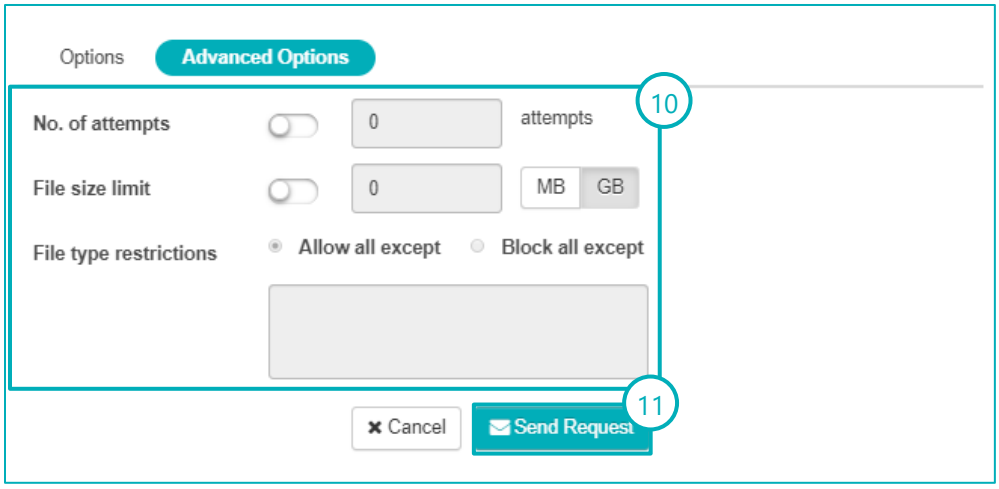

10. Enable/Disable settings you wish to apply. To find out in details how each feature works, refer to the respective sections below.
11. Click **Send Request**.

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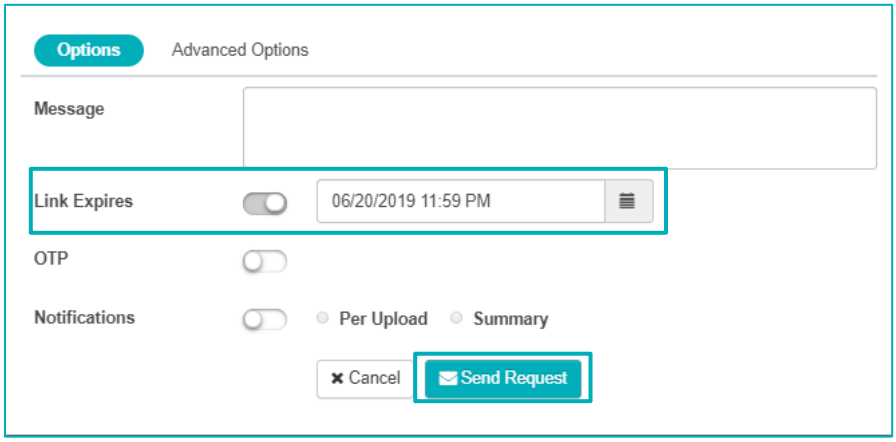
8.1.1 File Request with Link Expiry

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.



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.

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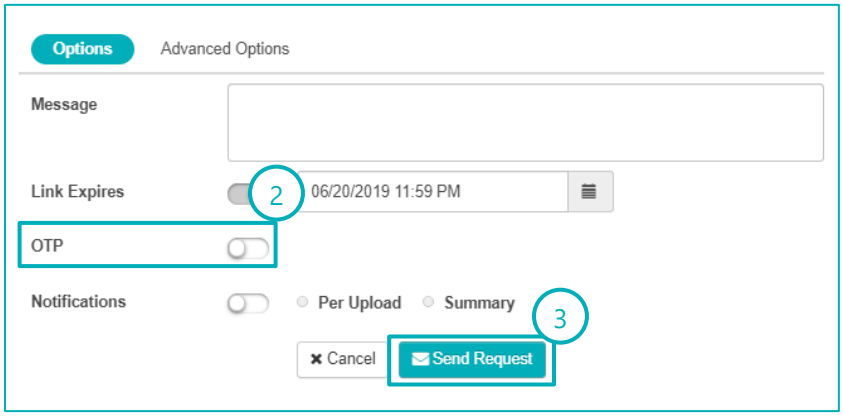
8.1.2 File request with OTP

1. Refer to Section File request to begin requesting files.
2. Enable **OTP**.
3. Click Send Request.



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.

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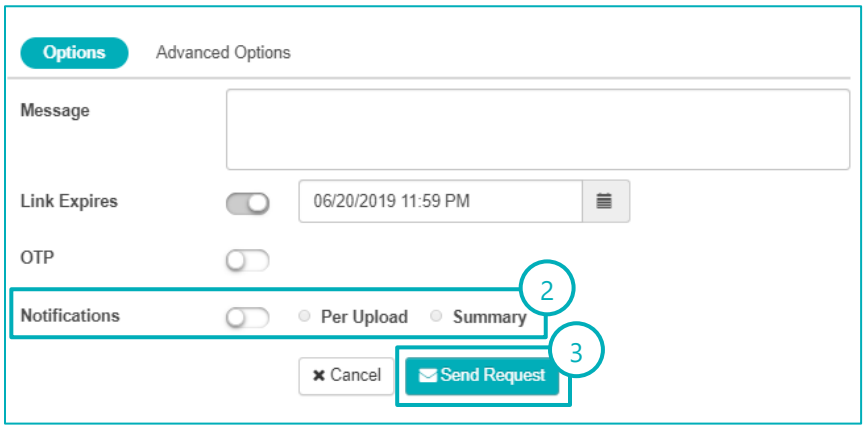
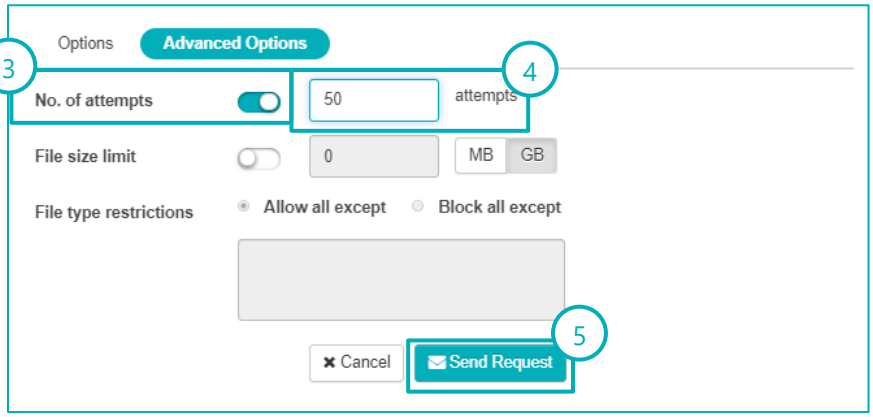
8.1.3 Receive Notification When External Users Upload Files

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.



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**.



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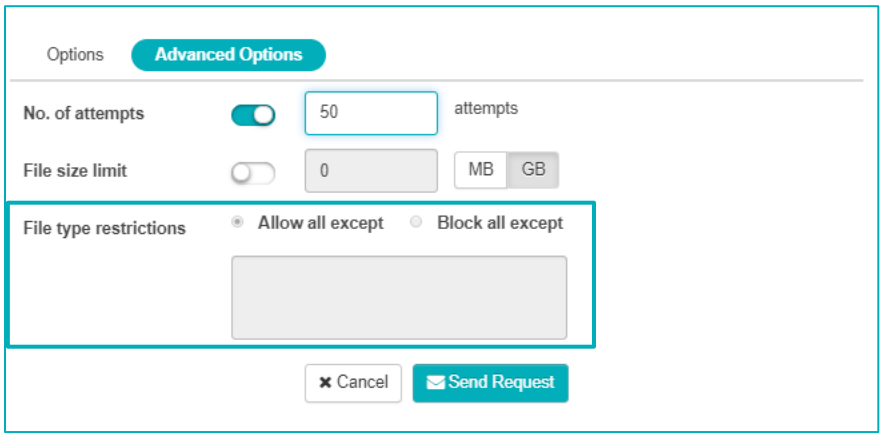
Note: This feature may be controlled by your central administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.

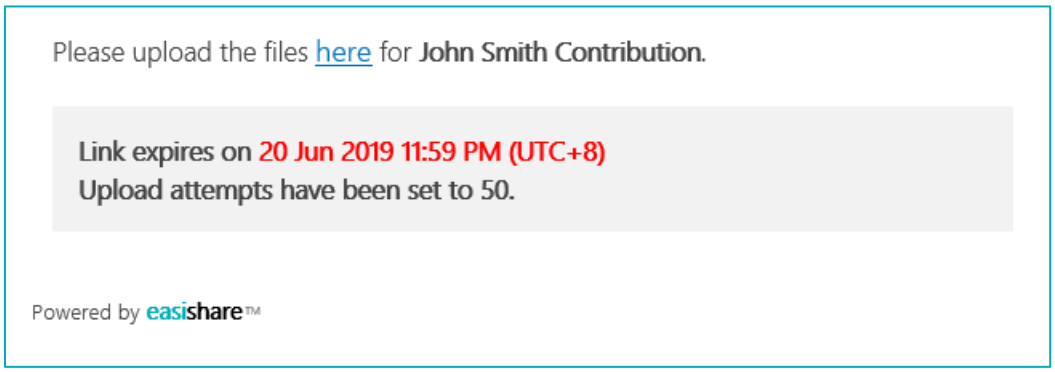
8.1.5 View Restricted File Types

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**.



8.2 Upload Files Using File Request

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



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**.**

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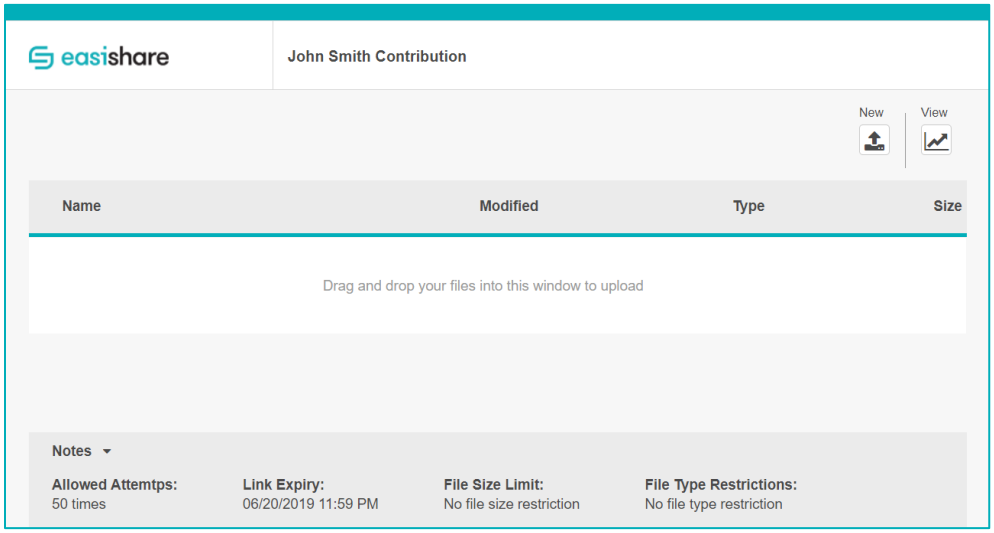
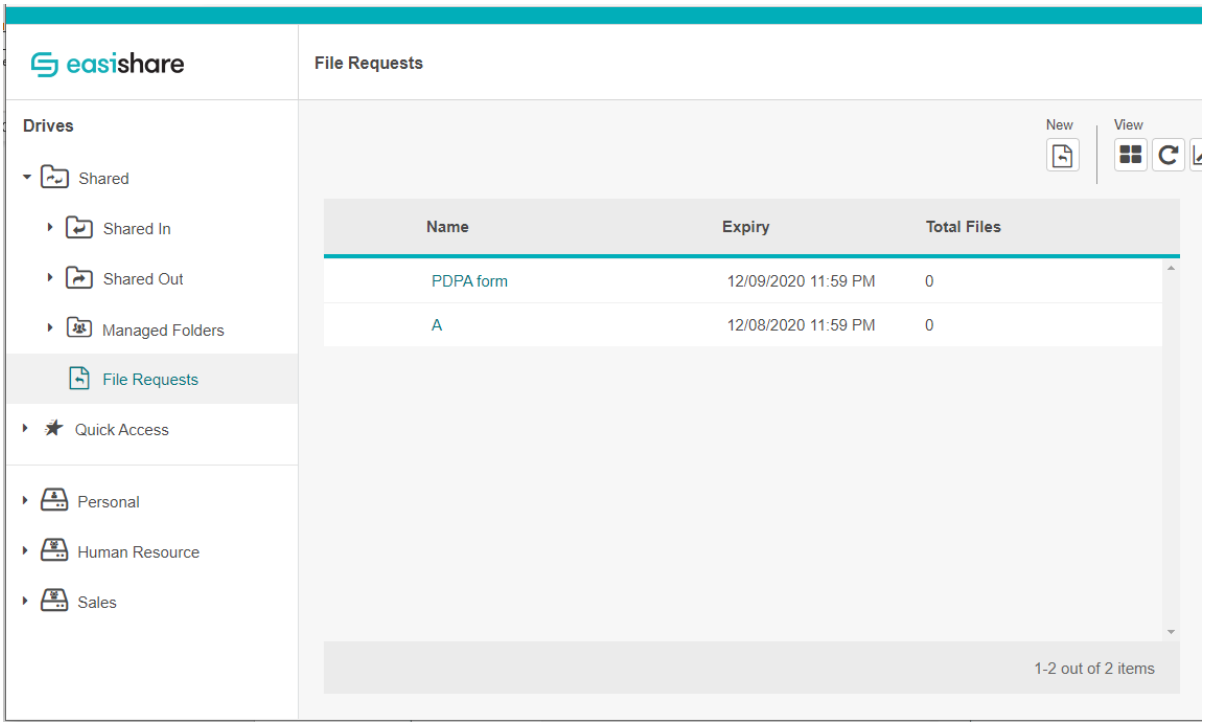


8.3 Access Uploaded Files on File Request

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.



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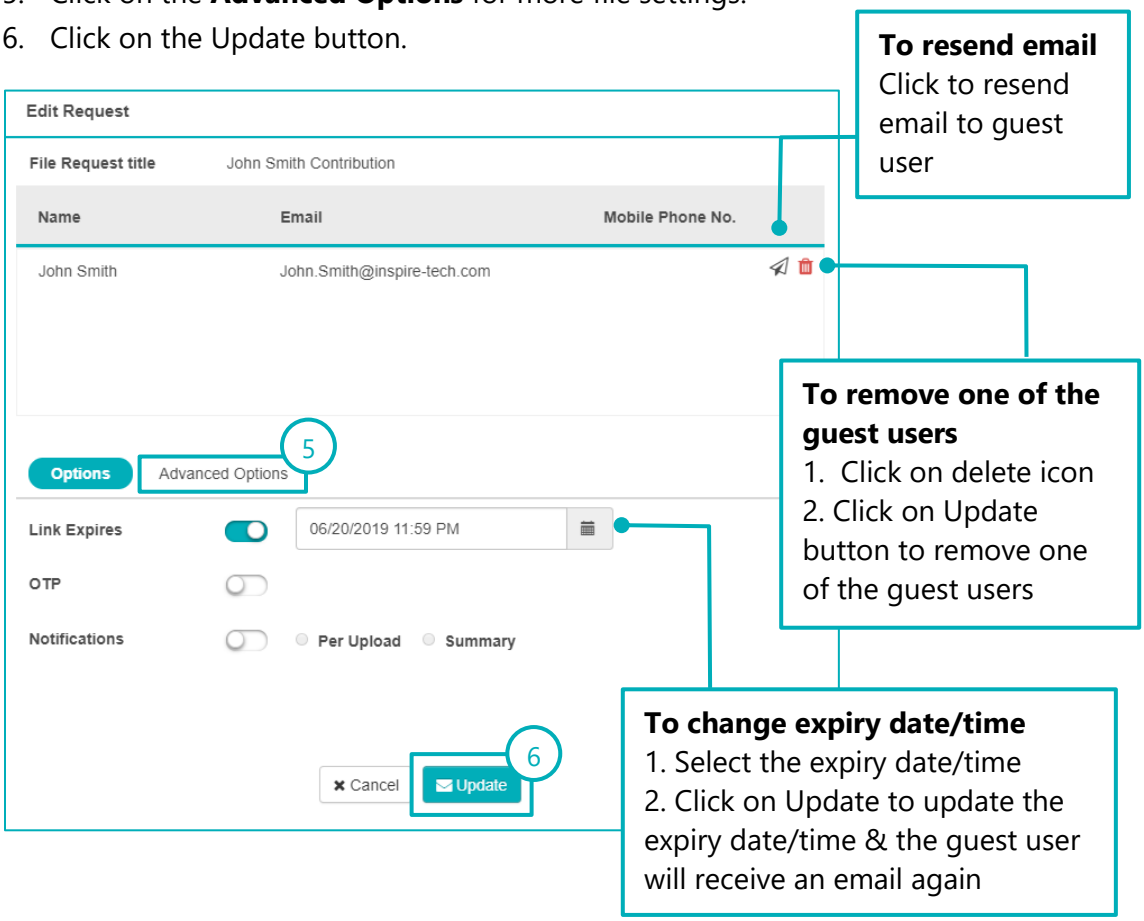
8.4 Edit File Request

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.



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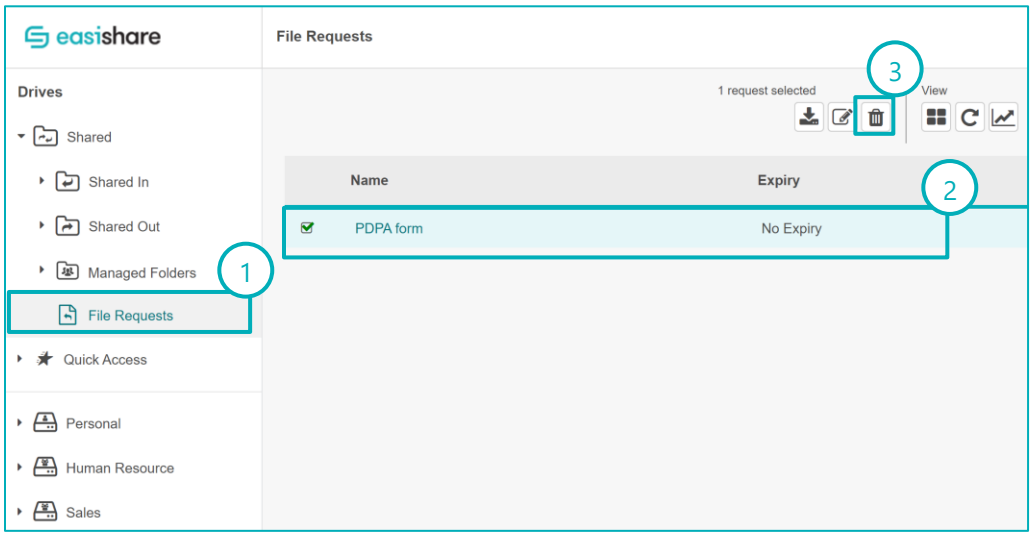
8.5 Revoke File Request

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.



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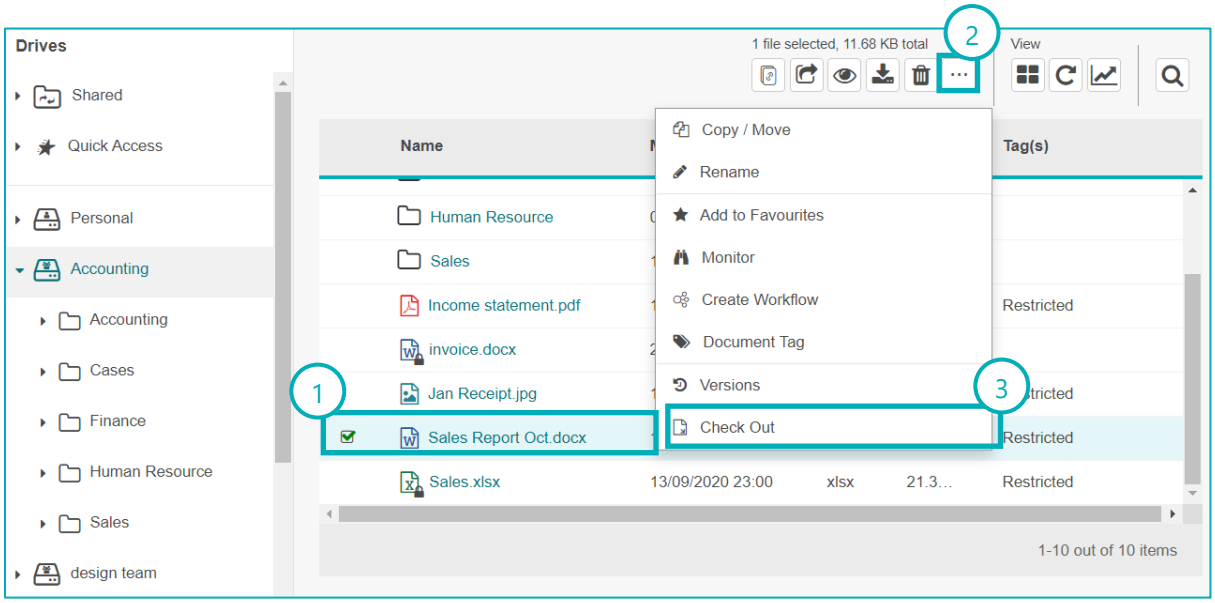
9 Check in/Out

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.

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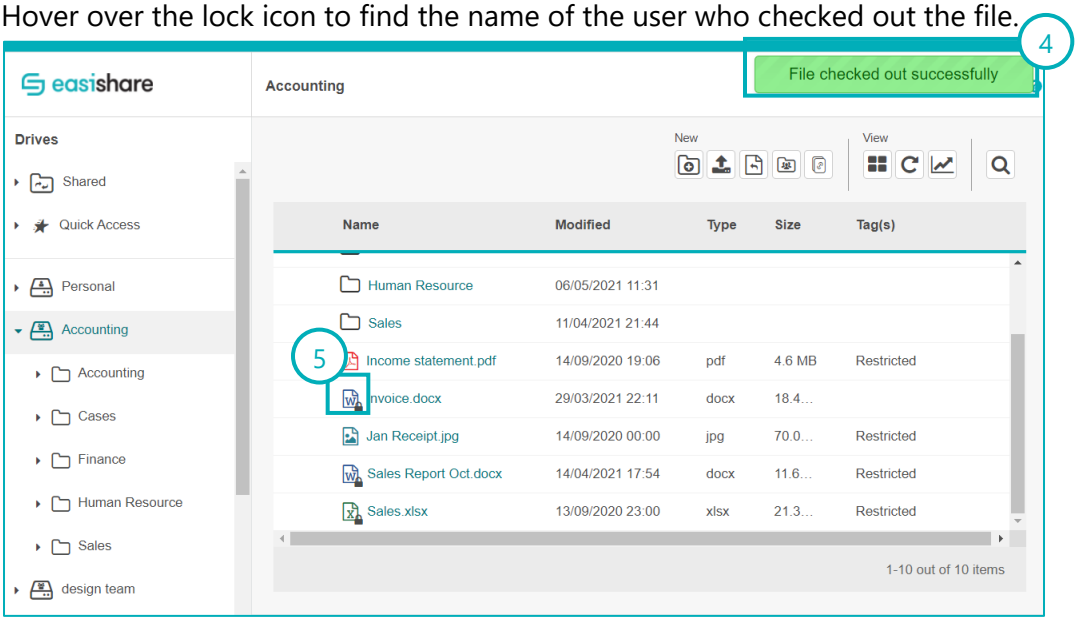
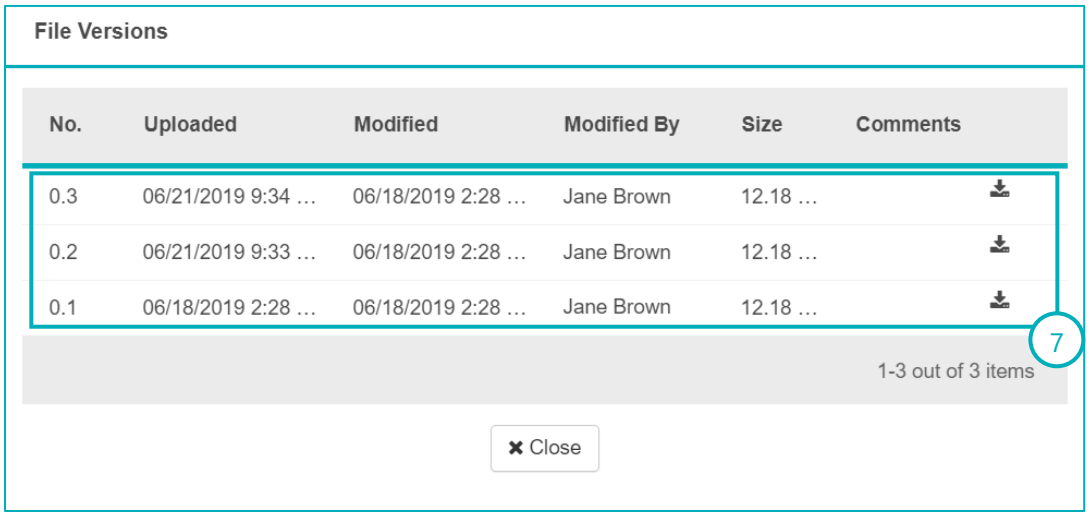
6. Hover over the lock icon to find the name of the user who checked out the file.



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.



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.

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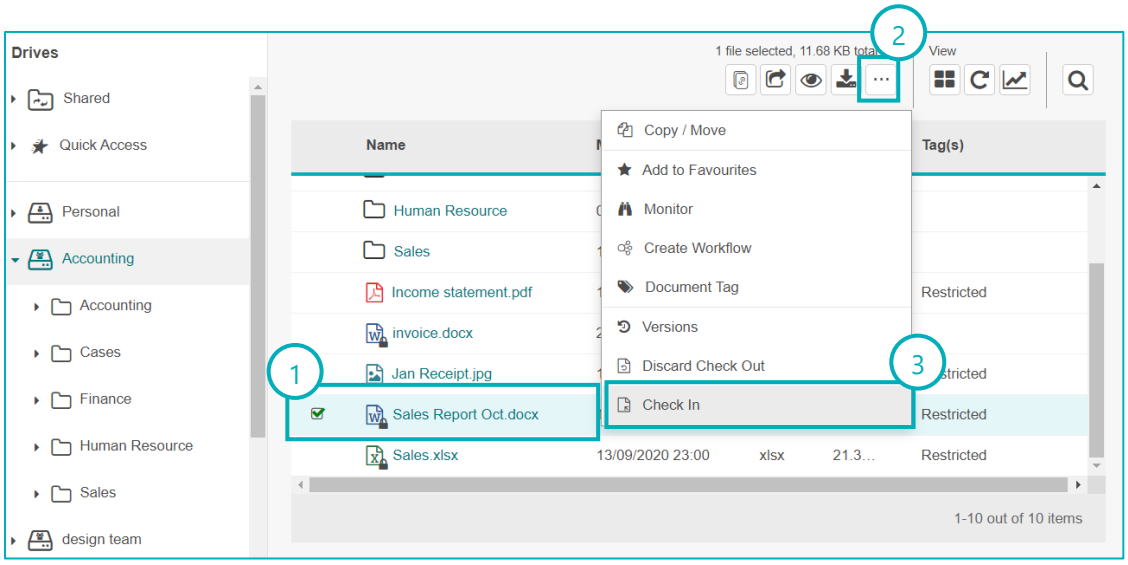
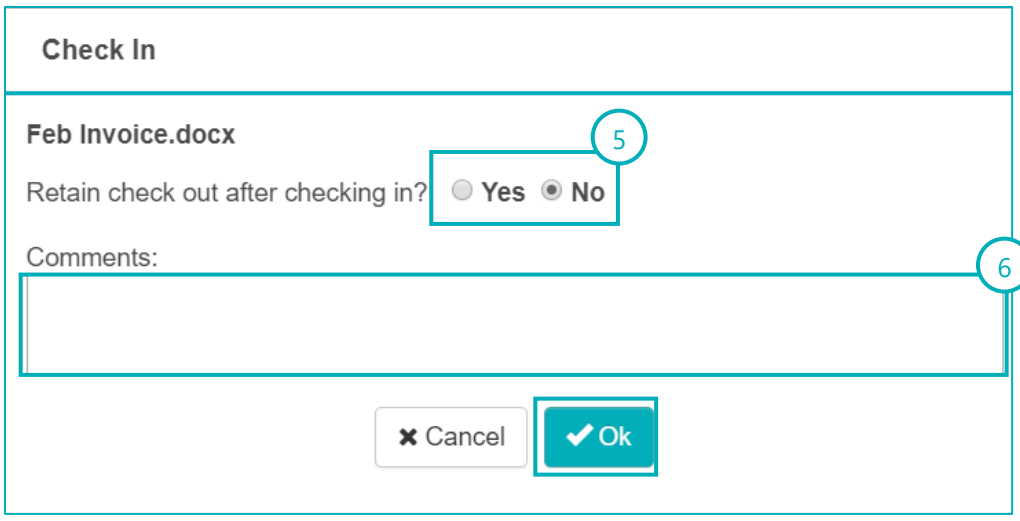
9.2 Check In a File

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**



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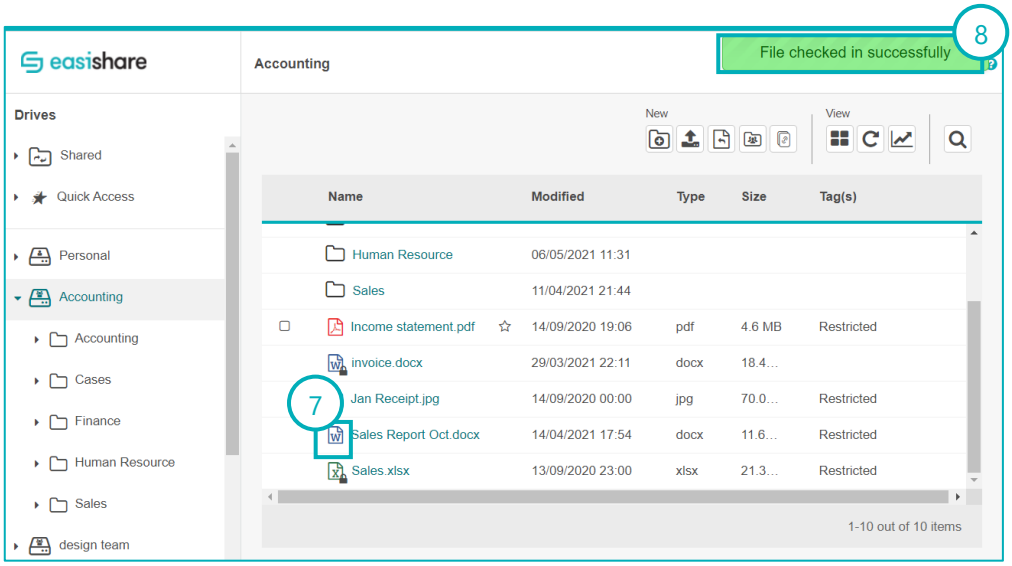
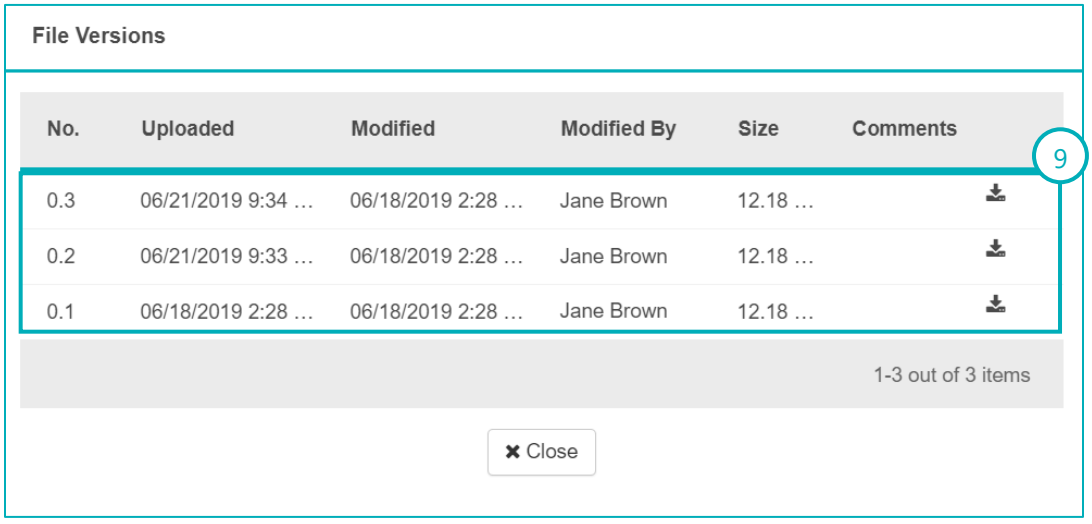
7. The lock icon on the file will **disappear**.
8. A check in success message will appear.



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**.



9.3 Discard Check Out

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

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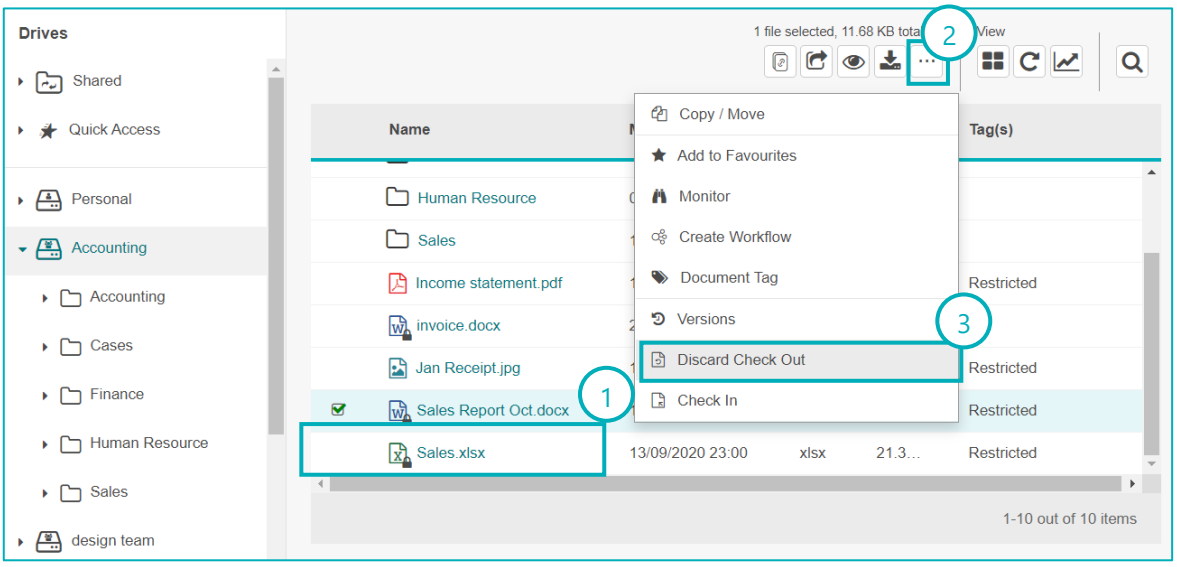
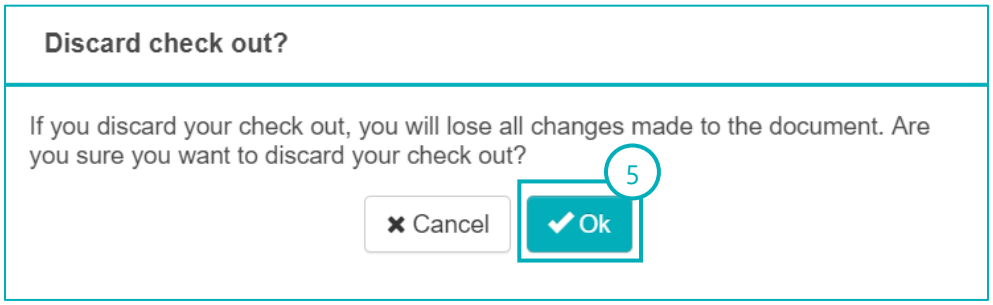
3. Click on **Discard Check Out** .



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



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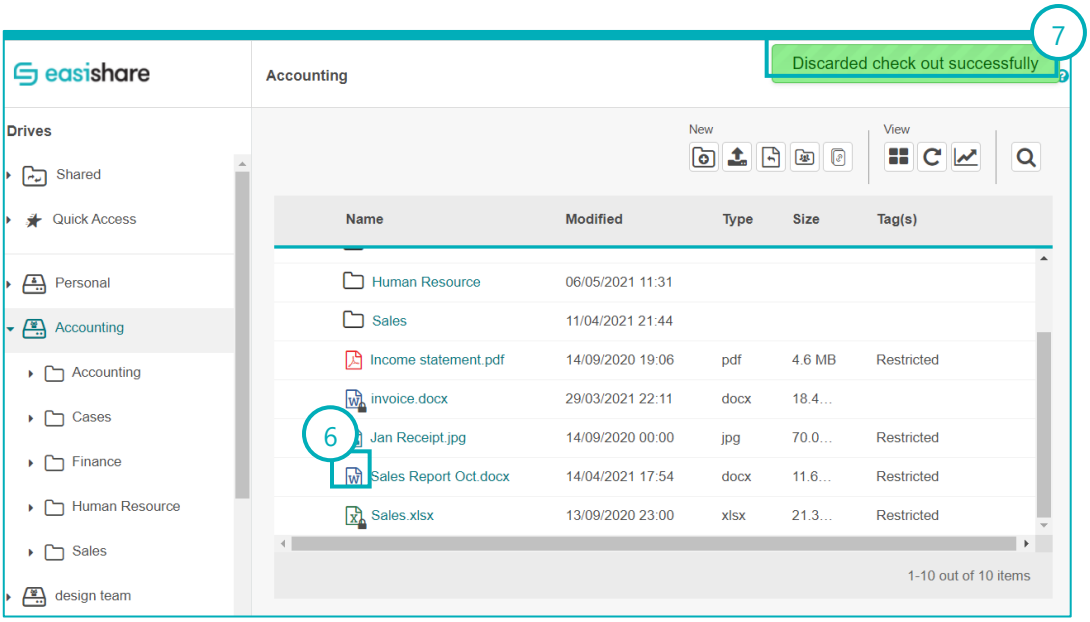
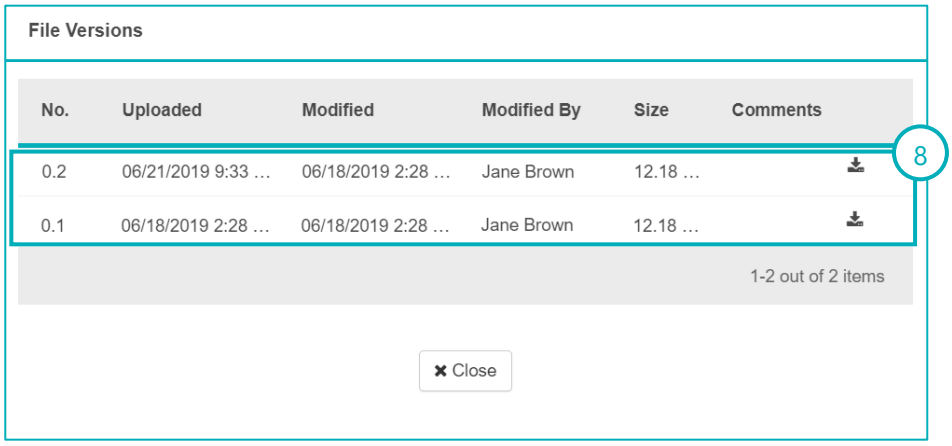
6. The Lock Icon is not on the file anymore.
7. A Discard Check Out success message will appear.



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**.



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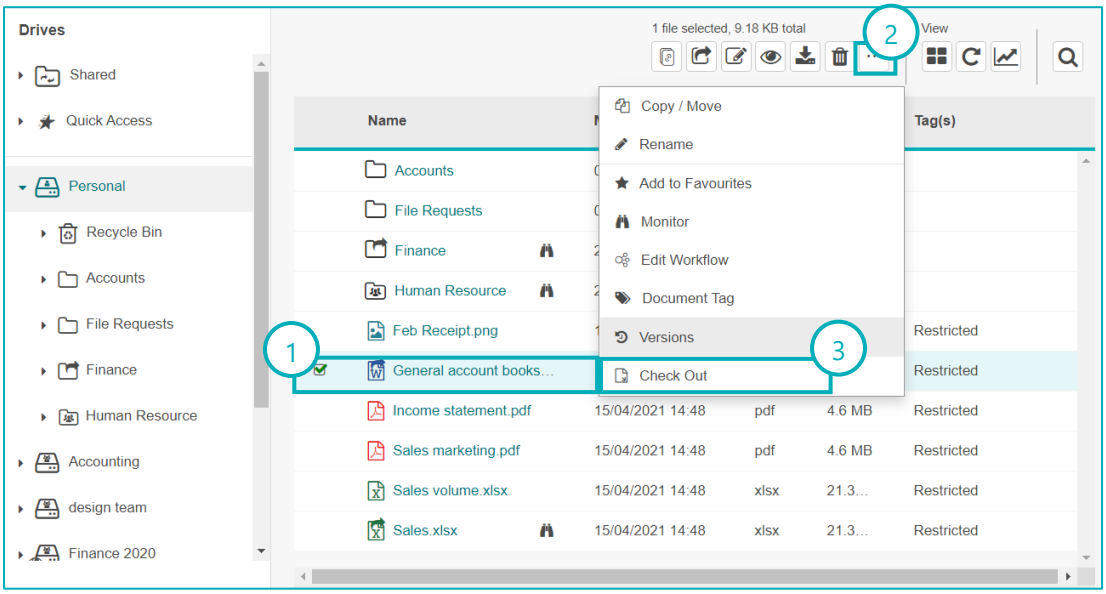
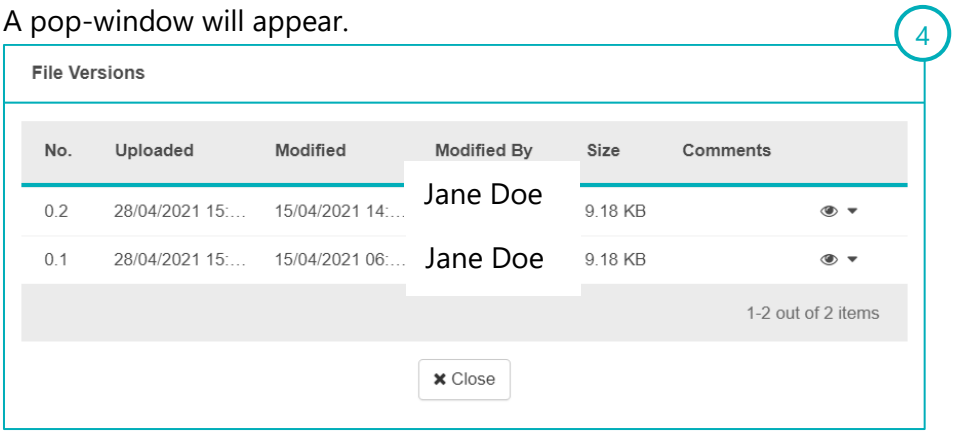
10 Versioning

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.

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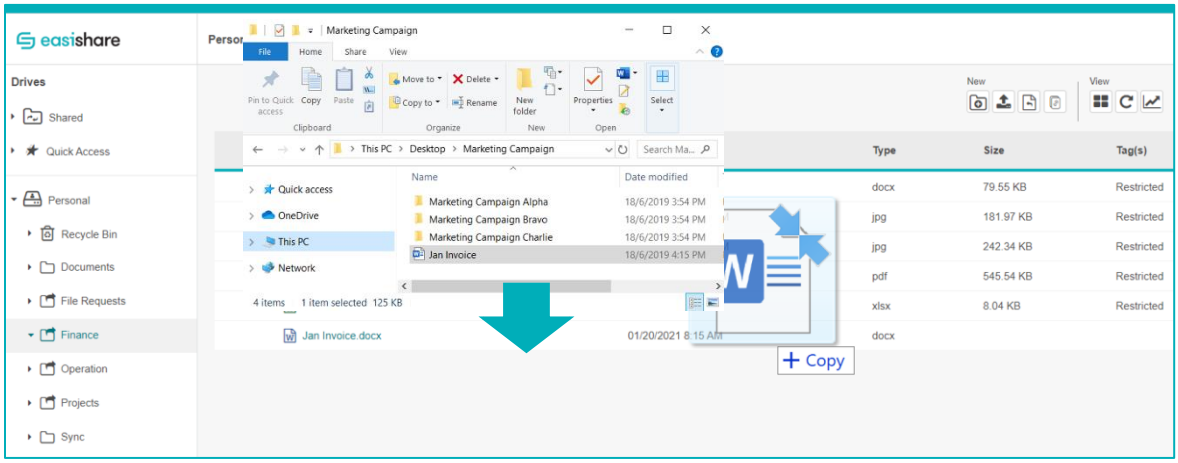
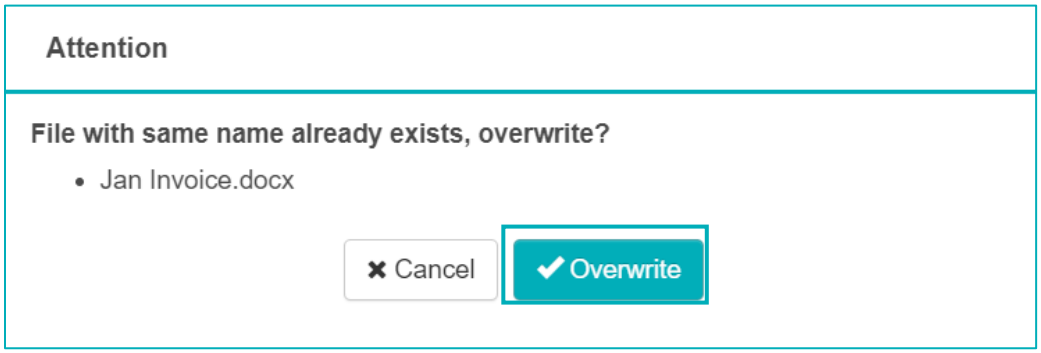
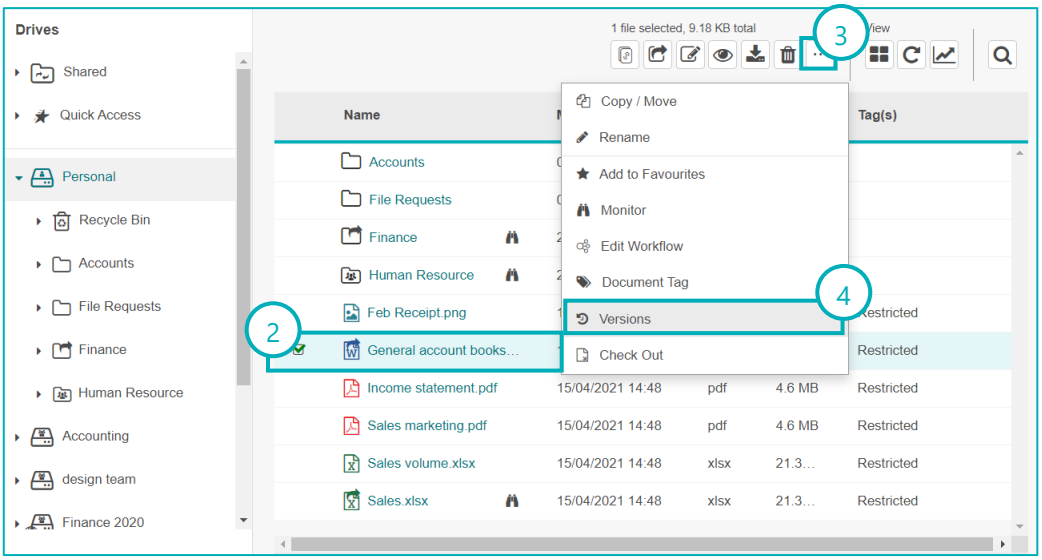




2. Select File Uploaded
3. Click on the **Options** ··· located at the top.
4. Click on **Versions** .



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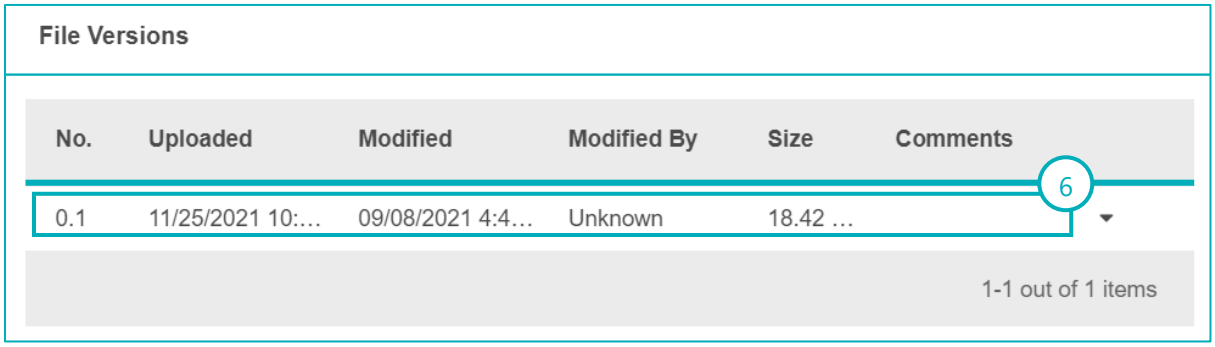
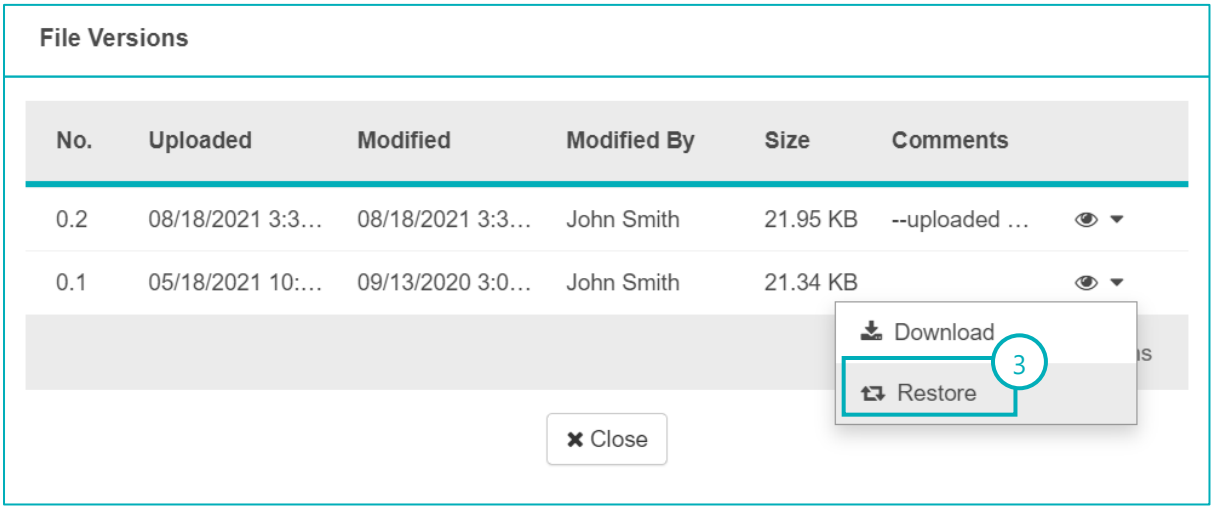
5. A pop-up window will appear.
6. A new version number will be created.



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.
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.

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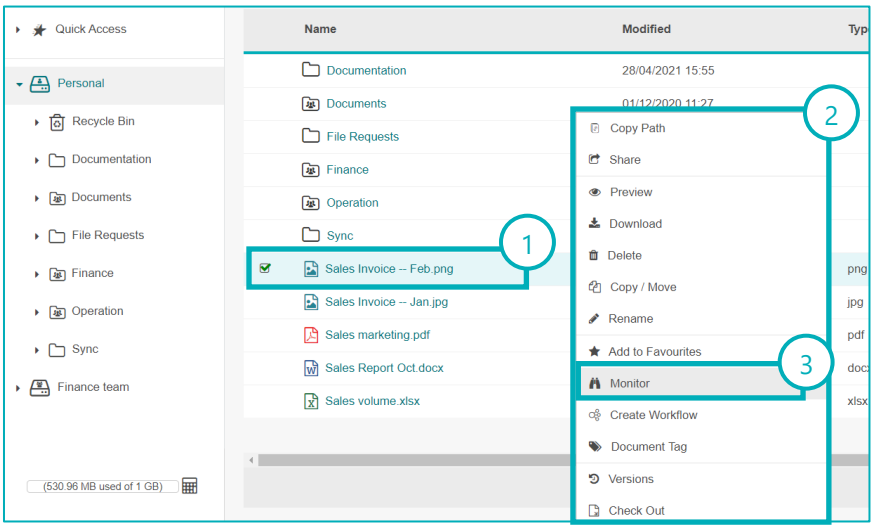
11.1 Monitor a file

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 • Immediately • Daily (Default: 9AM) • Weekly (Default: Monday)
When	Available selection: • 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

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

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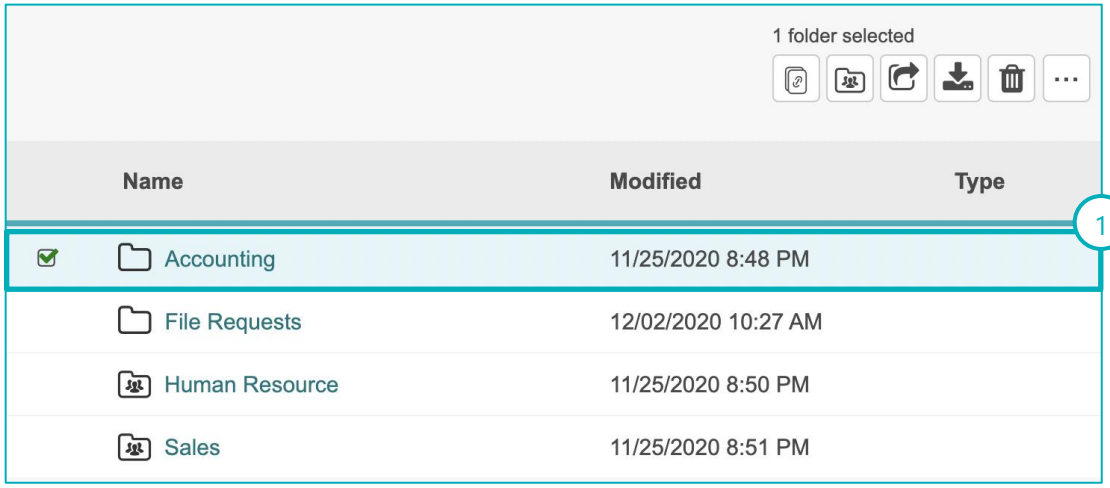
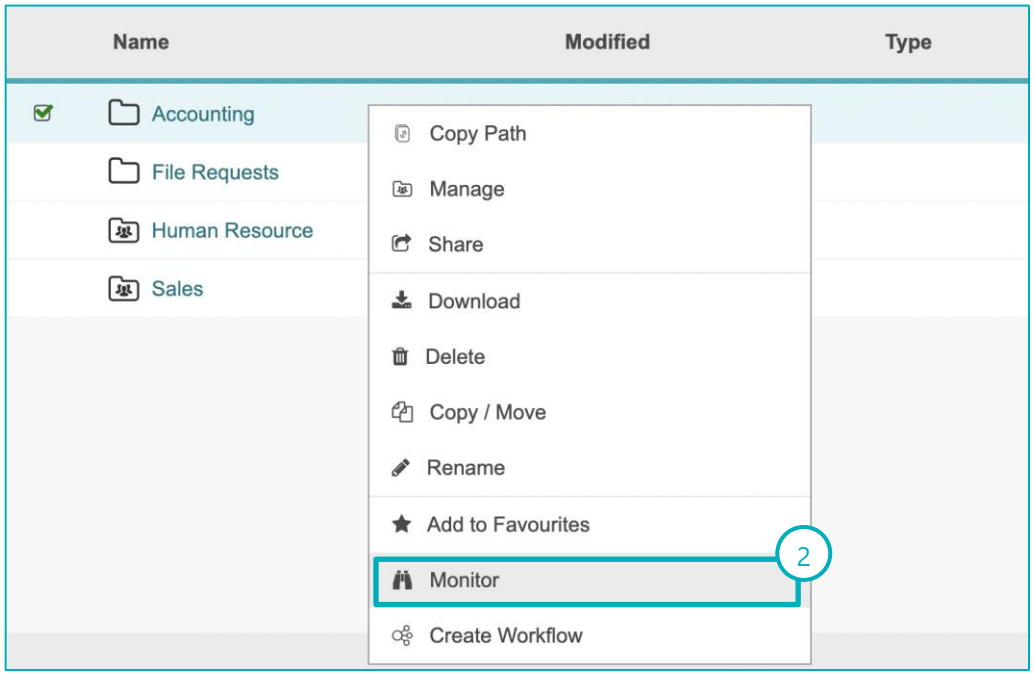
11.2 Monitor a folder

1. Select the folder that you wish to monitor



2. Right-click the folder and select Monitor



3. Select the options

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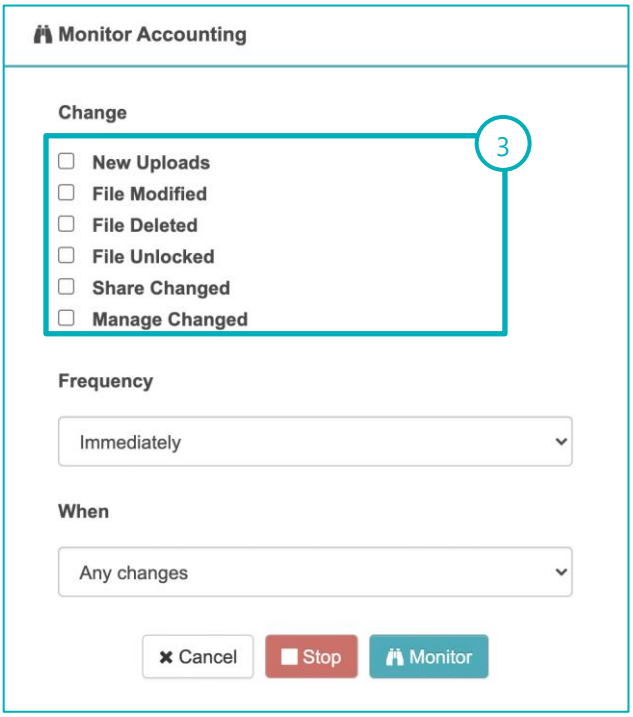

Option	Description
Changes > New Uploads	When a file is uploaded in the folder and any of its subfolders
Changes > File Modified	When any file has been overwritten
Changes > File Deleted	When any file has been deleted
Changes > File Unlocked	When any file is Discard Check-Out
Changes > Share Changed	When any file was shared
Changes > Manage Changed	When the folder and any of its subfolders has added/removed/edited managed permissions Note: This selection only affects folders and the following 'When' Options do not apply: • 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	To control when you will receive an email notification • Immediately

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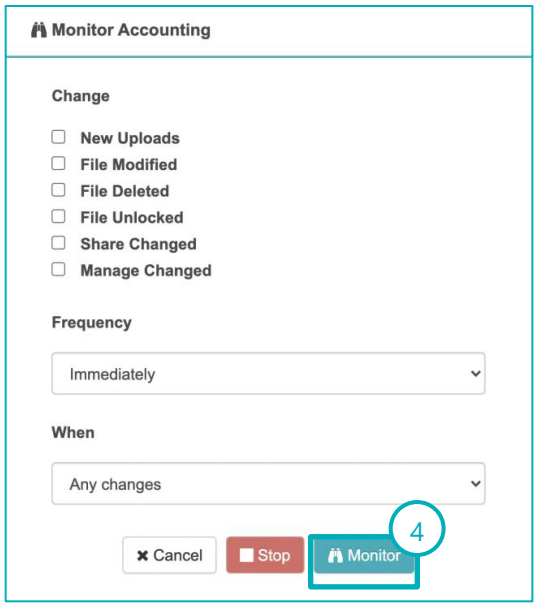
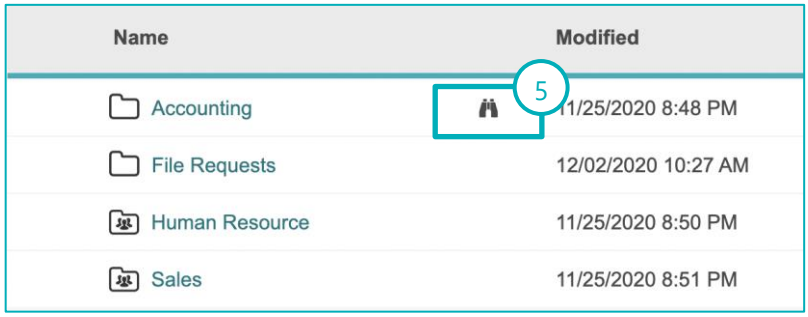
	• Daily (Default: 9AM) • Weekly (Default: Monday)
When	Available selection: • Any changes • Someone else changes • Any changes to document(s) created by me • Someone else changes document(s) created by me • Someone else changes document(s) last edited by me

4. Click on Monitor



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



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

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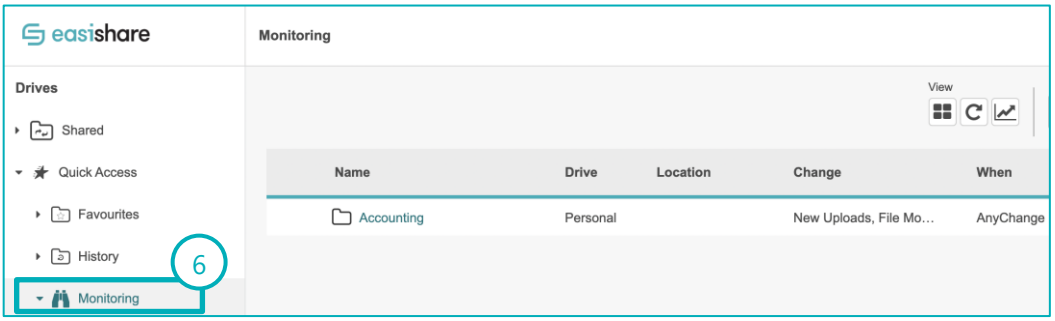
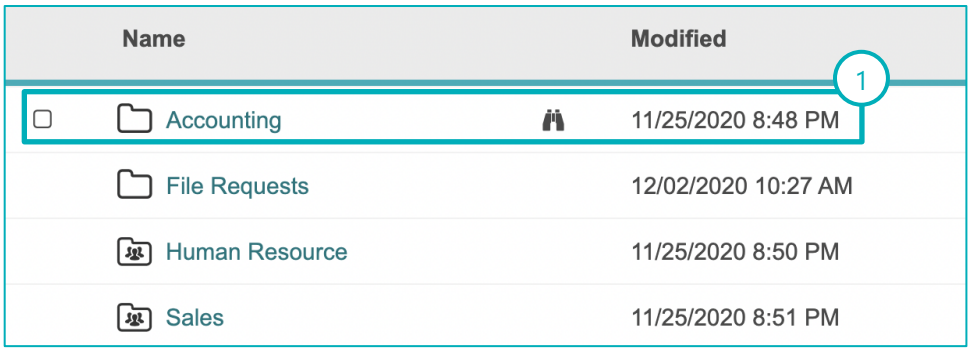
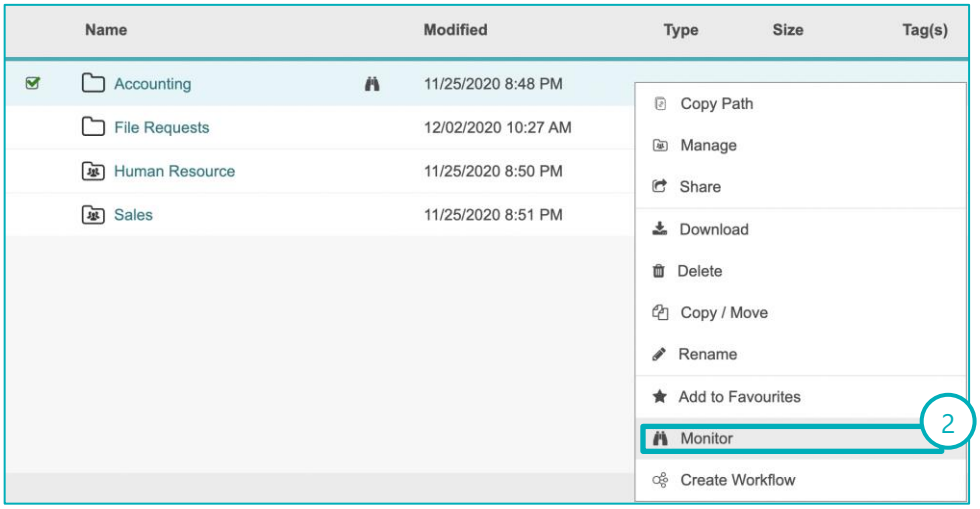


11.3 Stop Monitoring a File/Folder

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



2. Right-click the folder and select Monitor



3. Click on Stop

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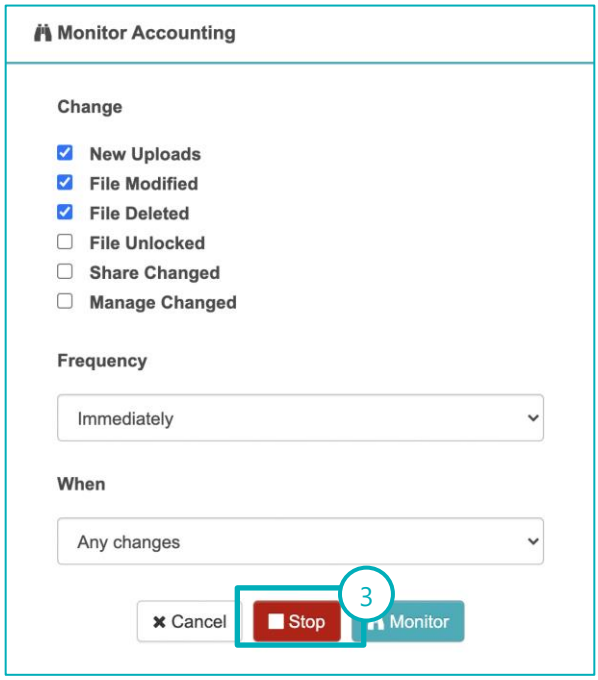

12 Workflow

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

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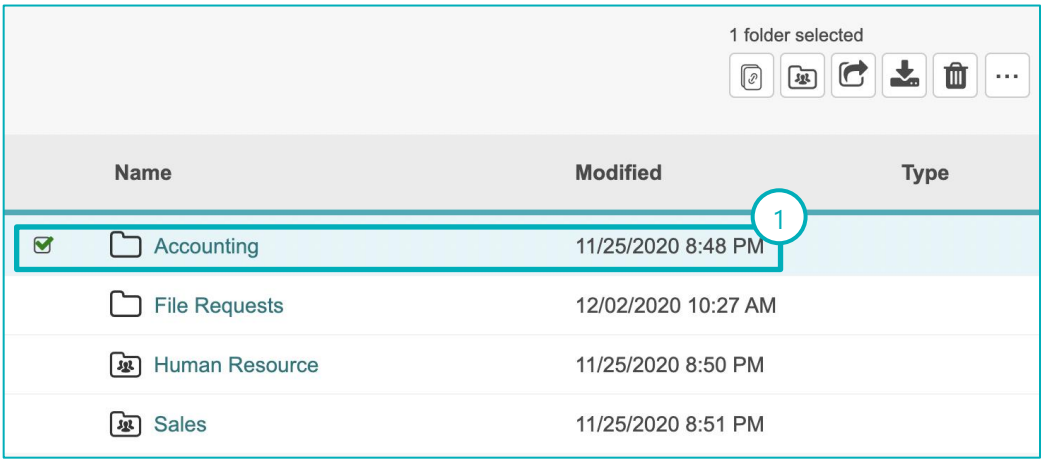
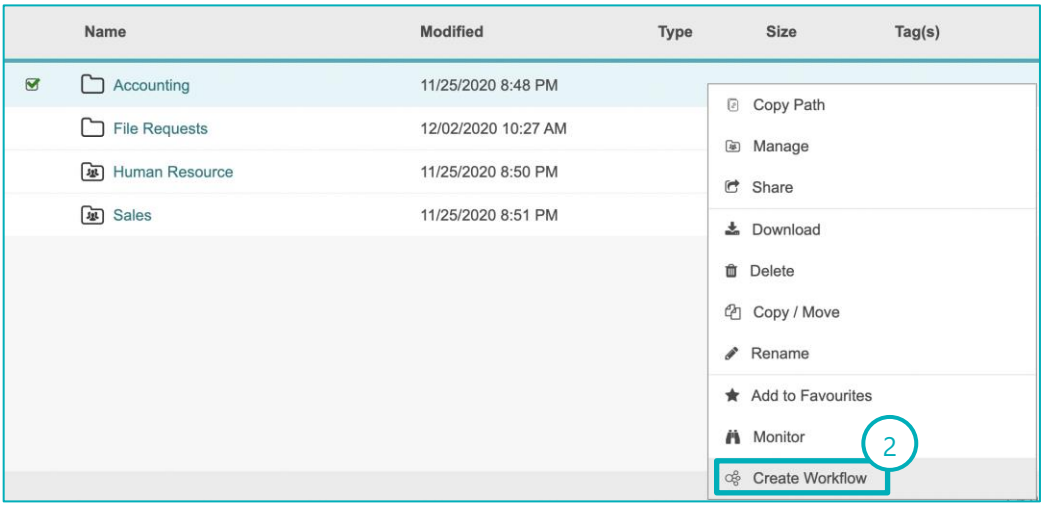


2. Right-click and select Create Workflow



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

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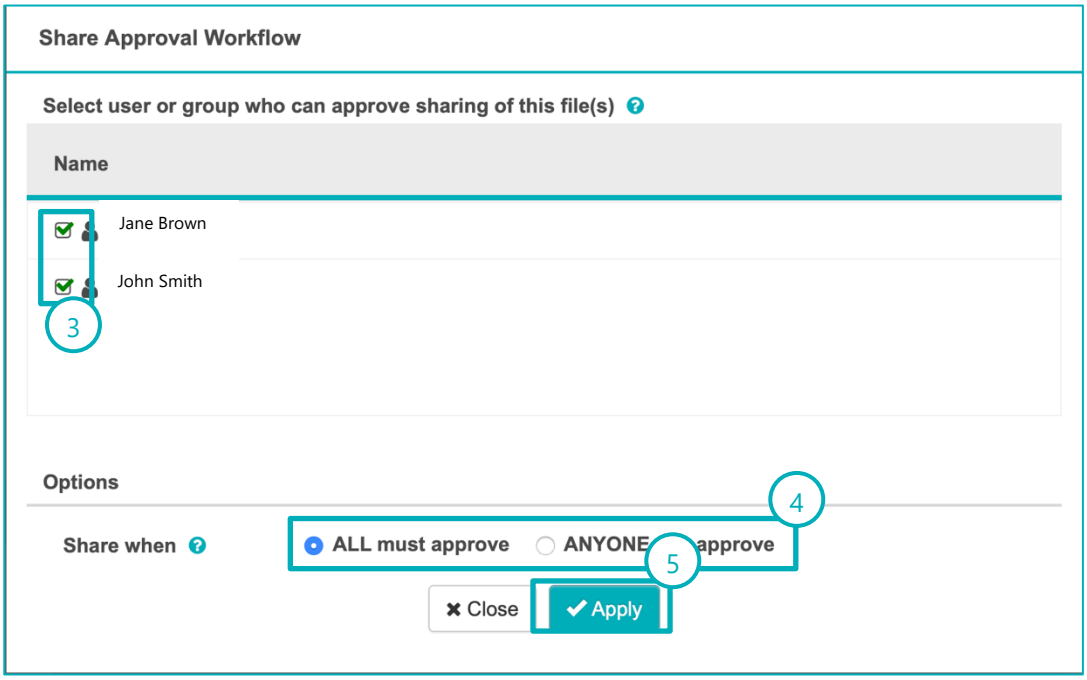
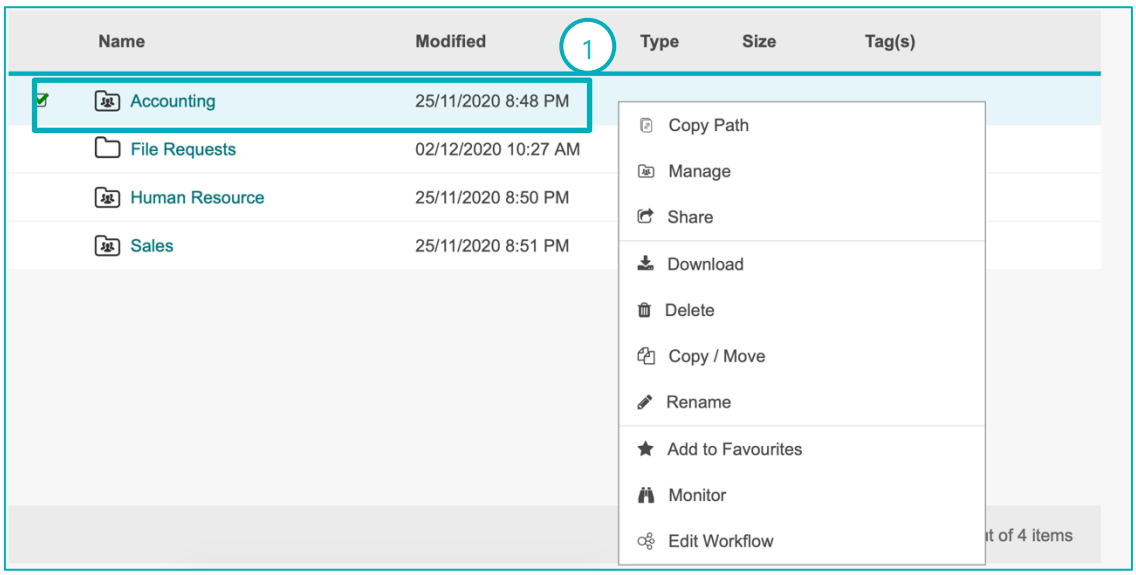


12.2 Owner Edits Workflow

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



3. Select the approver(s)

4. Select "All must approve" or "Anyone can approve"

5. Click on Apply

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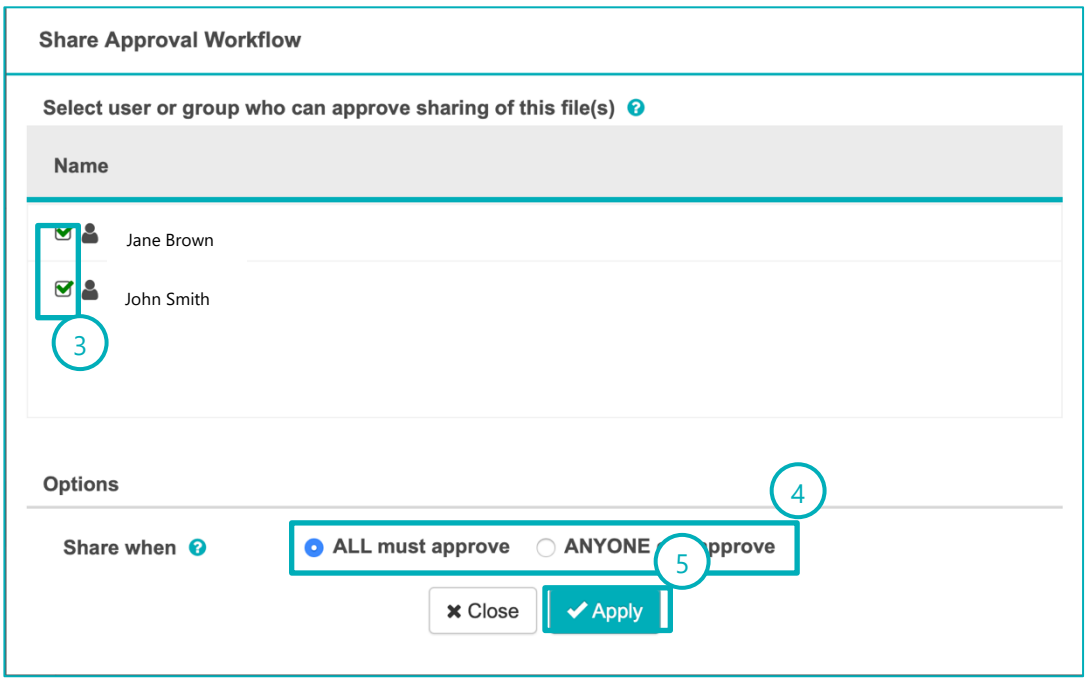
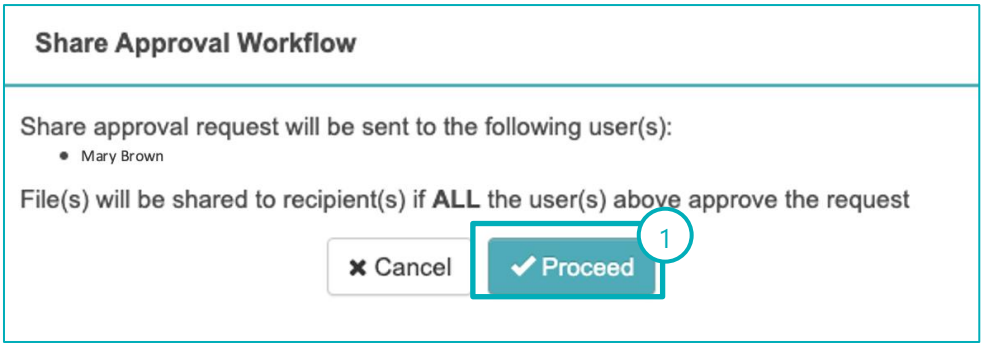


12.3 User Checks Pending Approvals and Remind Approvers

1. User shares a file/folder as per Share section
   Note: A Share Approval Workflow appears if a Workflow was created. Click on Proceed



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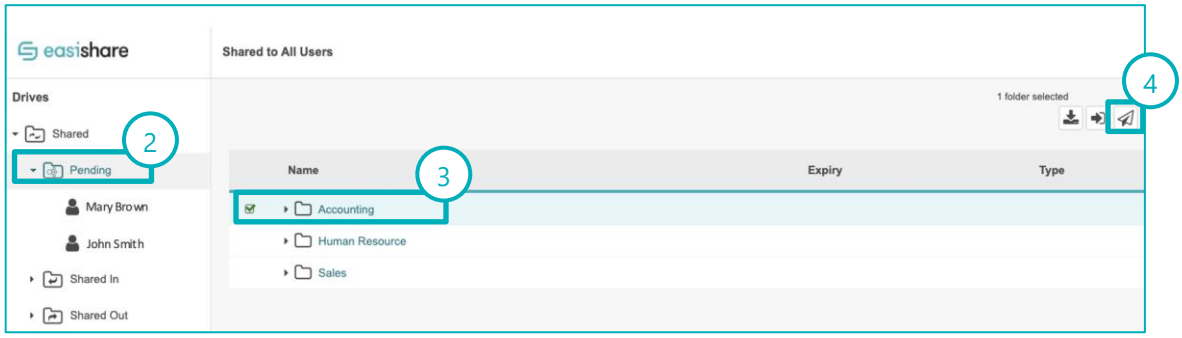
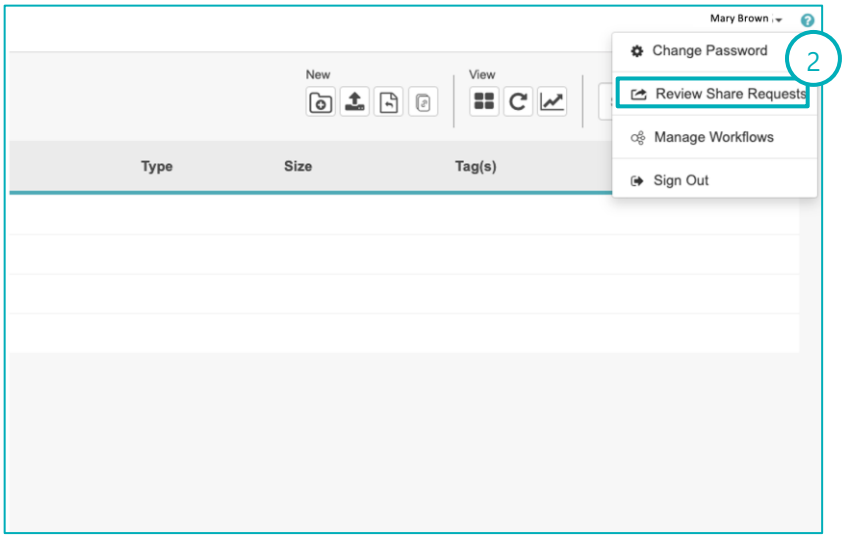
2. To check on Shares pending for approval, click on Shared > Pending
3. To send a reminder, select a pending Share
4. Click on Send Reminder on the top right



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

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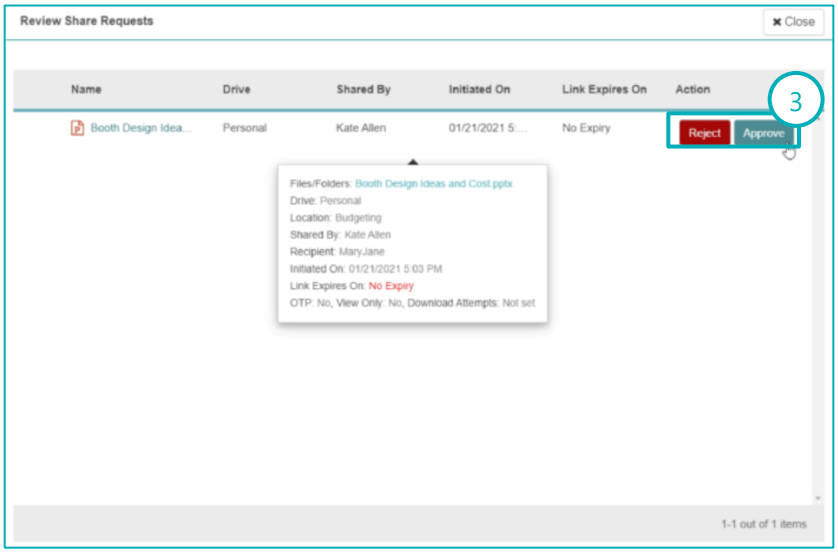

4. If Reject was selected, enter a reason for the rejection for the user.
5. Click on OK.

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