

EasiShare Web Portal User Guide

V12.4

(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.

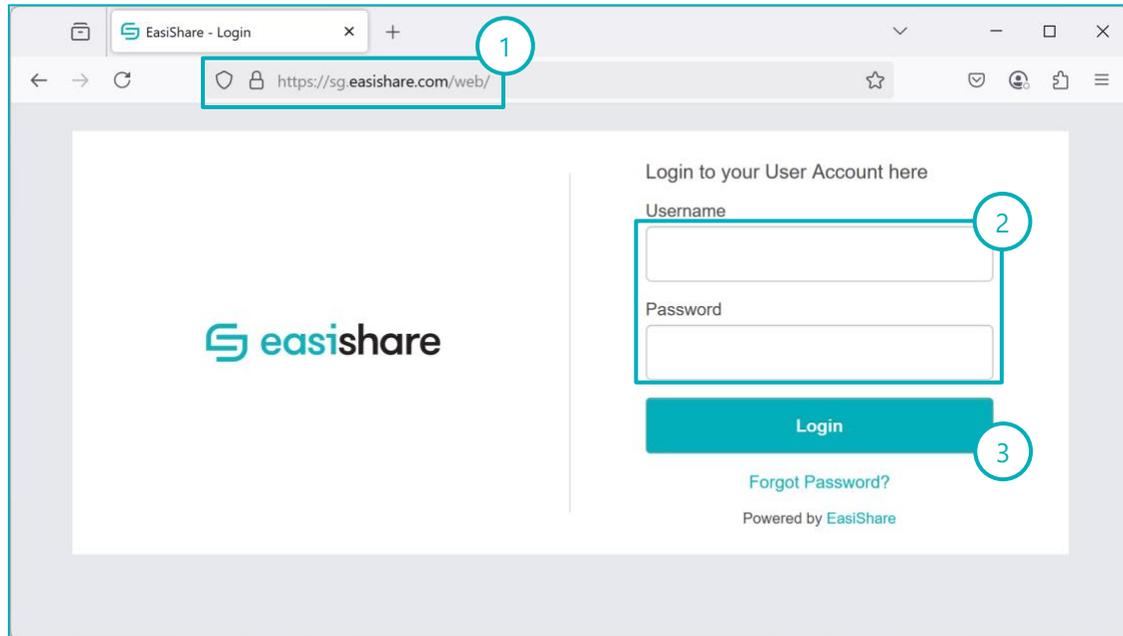


2 Login

2.1 Getting Started

To login:

1. Launch a web browser and go to the EasiShare Web Portal using your organisation's specific EasiShare domain. <https://clientname.easishare.com/web>
2. On the login page, enter your Username and Password.
3. Click Login to access your account.





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. Use the Forgot Password feature or check with your Administrator.

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

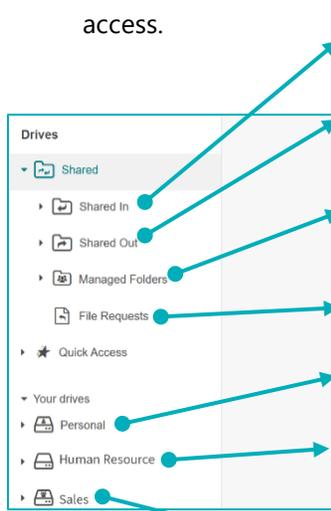
4. You must change your password before login.

Please change your password before proceeding.



2.2 Accessing EasiShare

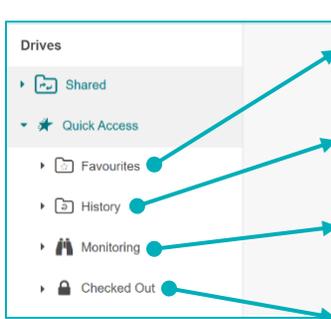
1. Logging in will direct you to the page as shown below. You should see drive(s) that you can access.



The screenshot shows a sidebar menu under the heading 'Drives'. The menu items are: Shared (expanded), Shared In, Shared Out, Managed Folders, File Requests, Quick Access (with a star icon), Your drives (expanded), Personal, Human Resource, and Sales. Red callout boxes with arrows point from these items to descriptive text blocks on the right.

- Files & Folders shared by EasiShare users to you.**
- Files and folders you've shared with others are listed here. You can review, revoke, or extend the Share as needed.**
- Folders that you, as the Owner, have shared with others are listed here. This is also where you can review the permissions granted to each user.**
- After you initiate a file upload request to non-EasiShare users and they complete the upload, you can download the files from this page.**
- A dedicated drive for your personal working files.**
- Drives that have been given permission to you by the EasiShare Administrator for collaboration on a department level**

1.1 Shared Drives/Folders that have been given permission to you by other EasiShare users for collaborating typically on peer or team level

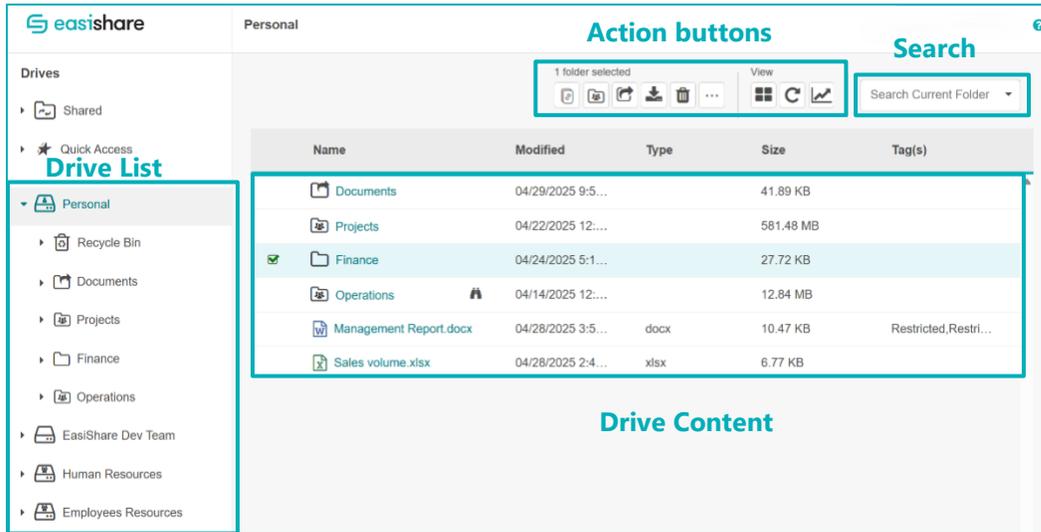


The screenshot shows the 'Drives' sidebar menu with 'Quick Access' selected. The menu items are: Shared, Quick Access (with a star icon), Favourites, History, Monitoring, and Checked Out. Red callout boxes with arrows point from these items to descriptive text blocks on the right.

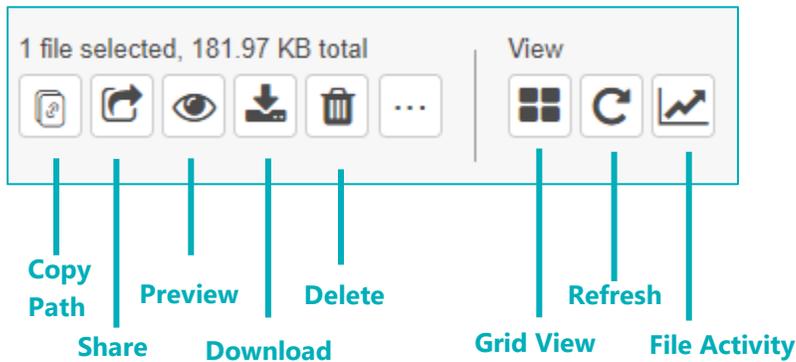
- Files and folders you've marked with a star. From here, you can easily open them or quickly navigate to their original location.**
- A record of your recent downloaded, previewed or edited files, up to maximum of 50 entries.**
- Tracks access, changes, or sharing activity on specific files and folders you're monitoring for security or collaboration purposes.**
- Access your checked-out files and perform a quick check-in when editing is complete.**



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



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

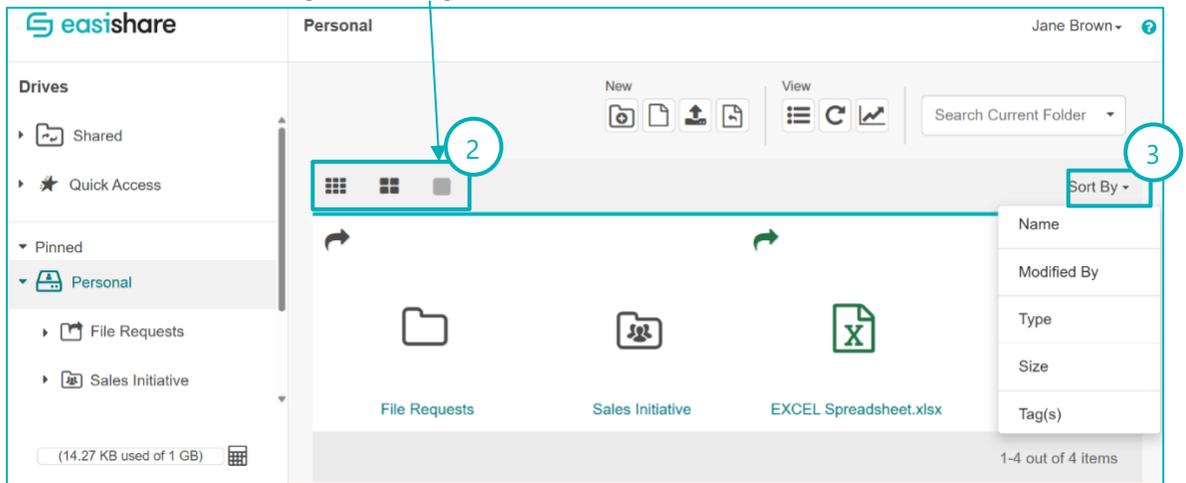




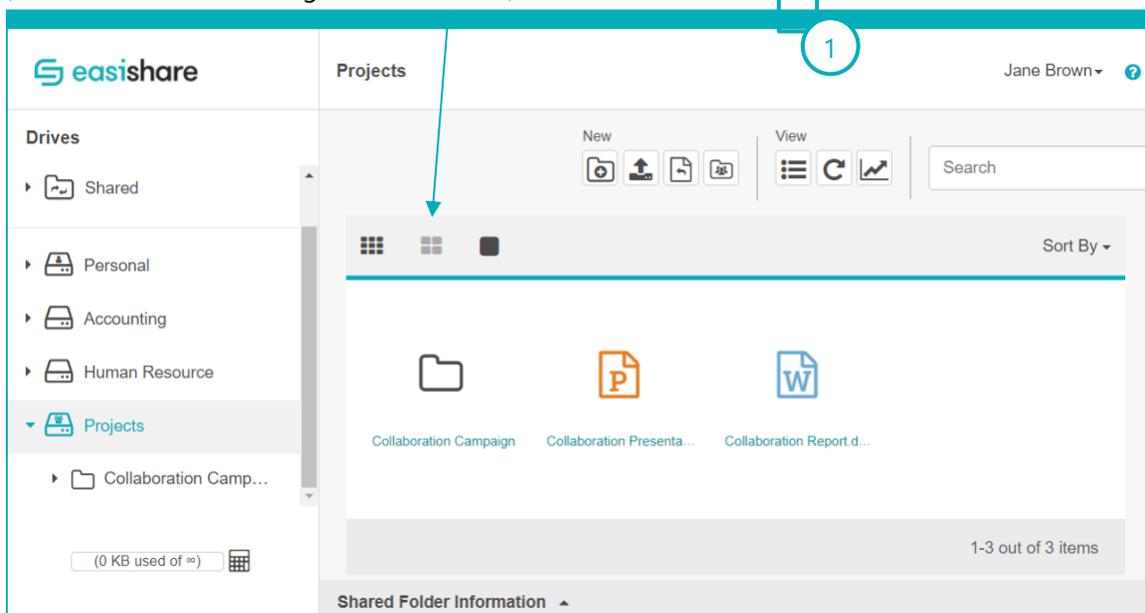
2.3 Switching Views

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. In Grid view, three sizes of choice are given, from left to right, small, medium and large views.
3. Users will be able to sort file(s)/folder(s) according to their preference with the help of the sorting menu.

(In Grid mode, where the grids are largest)

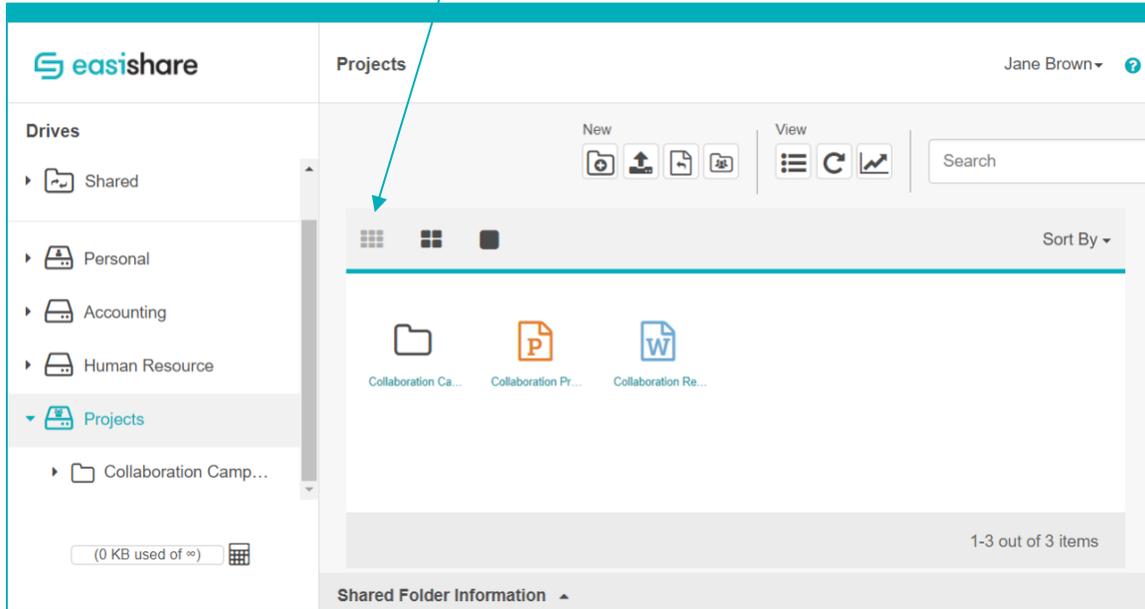


(In Grid mode, where the grids are medium)

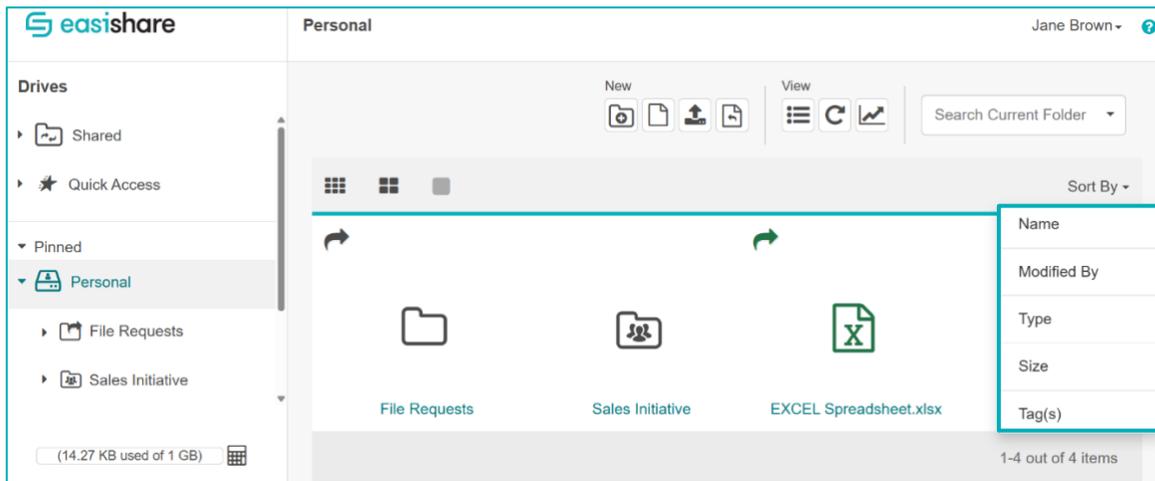




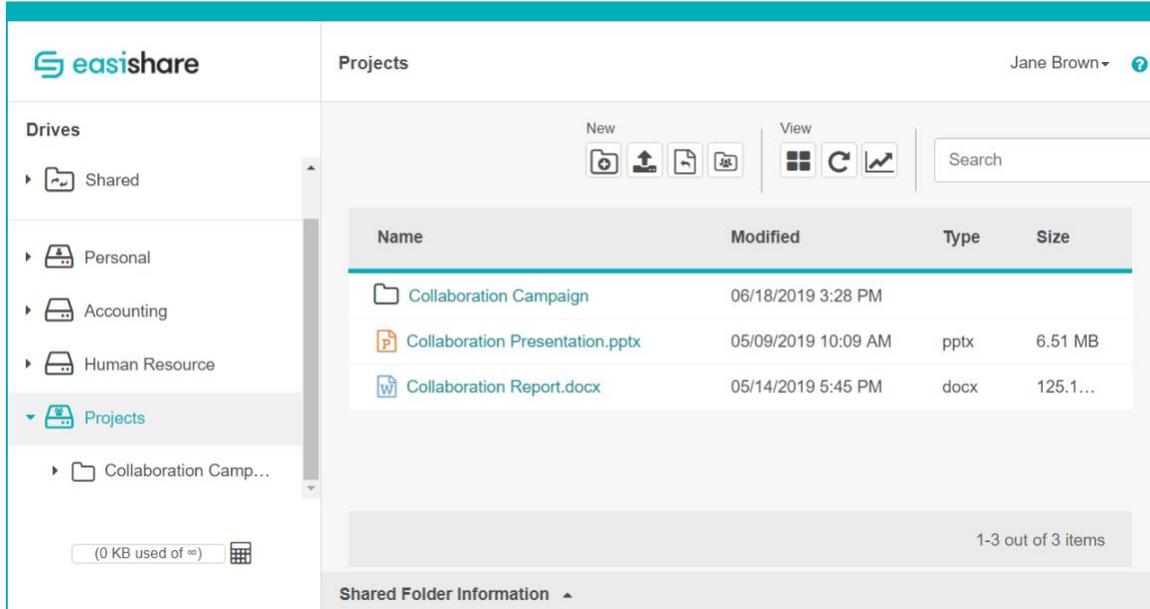
(In Grid mode, where the grids are small)



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



(In list mode)



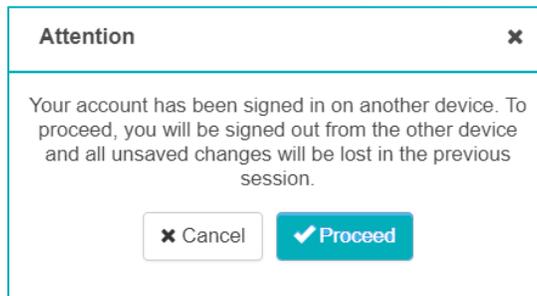
The screenshot shows the EasiShare web portal interface in list mode. The left sidebar displays a tree view of drives: Shared, Personal, Accounting, Human Resource, and Projects. The main content area shows a table of files under the 'Projects' drive. The table has columns for Name, Modified, Type, and Size. The files listed are:

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 of the table, it indicates '1-3 out of 3 items'. Below the table is a 'Shared Folder Information' section.

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 his user account on one device at a time.
 - Whenever the system detects concurrent access, it will display the message below to sign out from previous devices before proceeding to login in the current device.



Attention ✕

Your account has been signed in on another device. To proceed, you will be signed out from the other device and all unsaved changes will be lost in the previous session.

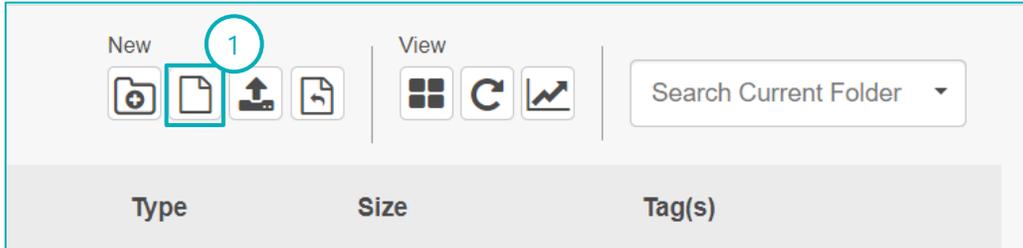
✕ Cancel Proceed

- For other devices, the same user account will be automatically signed out. To continue using those devices, you will need to log in again.

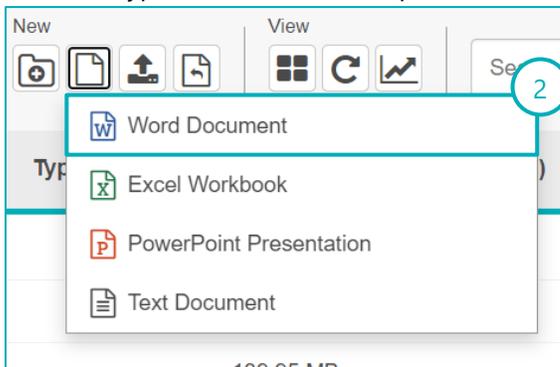
3 File Operations

3.1 Create a File

1. Click on the New Document icon in the toolbar.



2. Choose a type of file from the drop-down list.



3. The document will be created in the current folder.

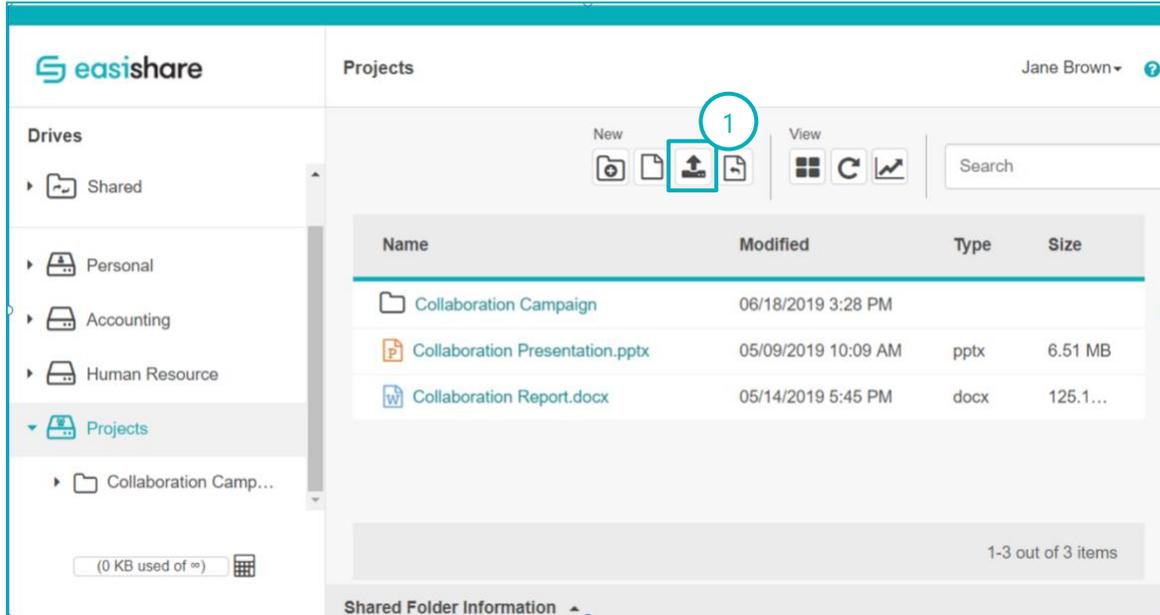
Name	Modified ↓	Type	Size	Tag(s)
New Word Document (1).docx	08/05/2024 17:02	docx	10.47 KB	



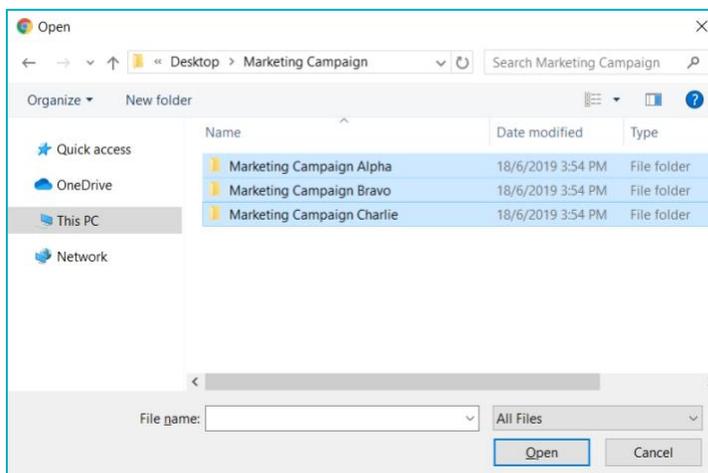
3.2 Upload Files

3.2.1 Using Upload Feature

1. Click on Upload File  in the toolbar.



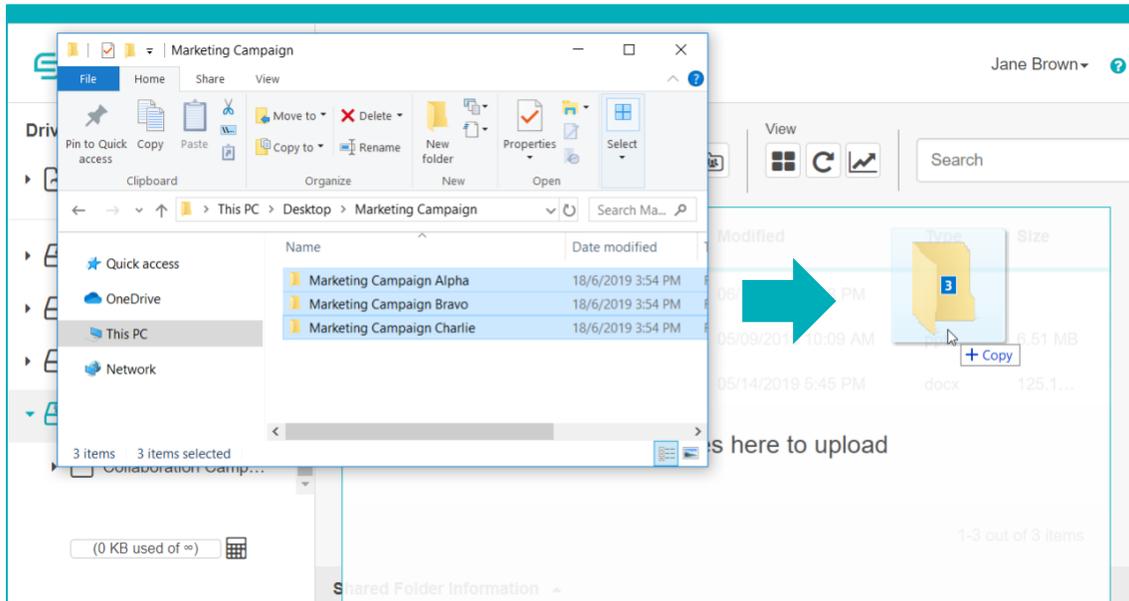
2. A file navigation window will appear. Select the file/folder(s) you wish to upload. You may select multiple file/folder(s) at a time.





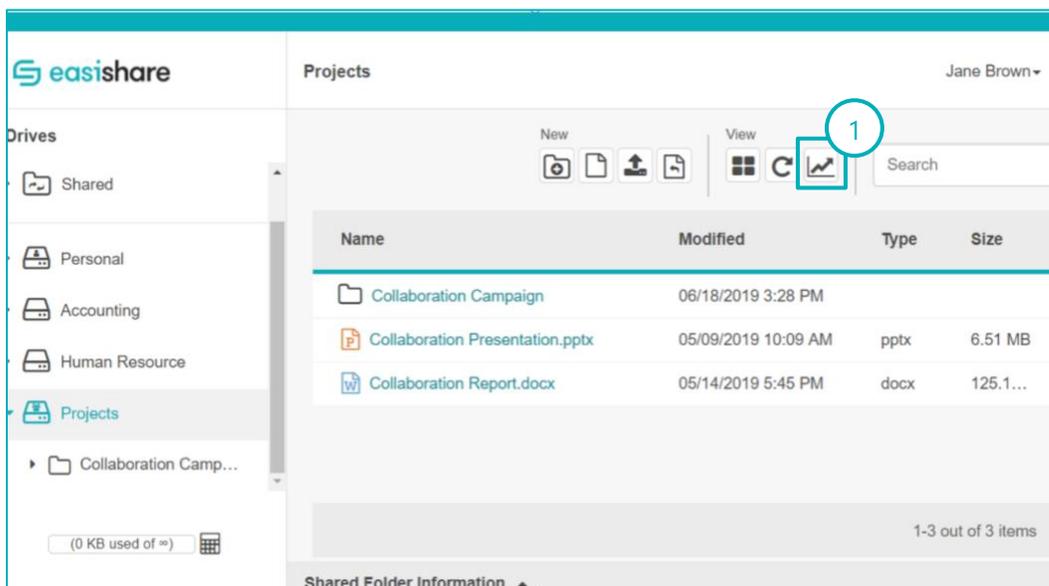
3.2.2 Using “Drag & Drop” Method

1. Drag and drop file/folder(s) from Windows File Explorer to the Web portal drive contents. You may select multiple file(s) at a time.



3.2.3 Check Upload Status

1. Click on File Activity  located in the toolbar.
2. Alternatively, you can click on File Activity in the pop-up message after each successful upload. Records are stored locally in the browser for 24 hours (by default).





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

1-1 out of 1 items

Clear Success Export Close

Note: You may encounter these pop-up messages.

- File is being uploaded

Your file is currently being uploaded. Check File Activity.

- If file with same name already exists, users will be given the options to click Overwrite to keep new copy or Cancel to keep the current copy

Attention

File with same name already exists, overwrite?

- Collaboration Report.docx

3.2.4 Uploading a Virus File

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

1. The message “Your file is currently being uploaded. Check File Activity.”

Your file is currently being uploaded. Check File Activity.

2. The diagram below shows the File Activity window.

File Activity					
Name	Path	Status	Action	Date	
virus.txt	Personal	Failed	Upload	06/18/2019 4:26 PM	Clear
		Virus Detected			

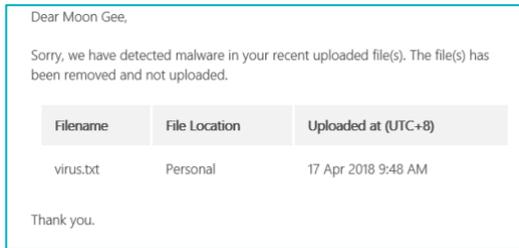
1-1 out of 1 items

Clear Success Export Close

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



- An email notification regarding the virus detection will be sent to the user:

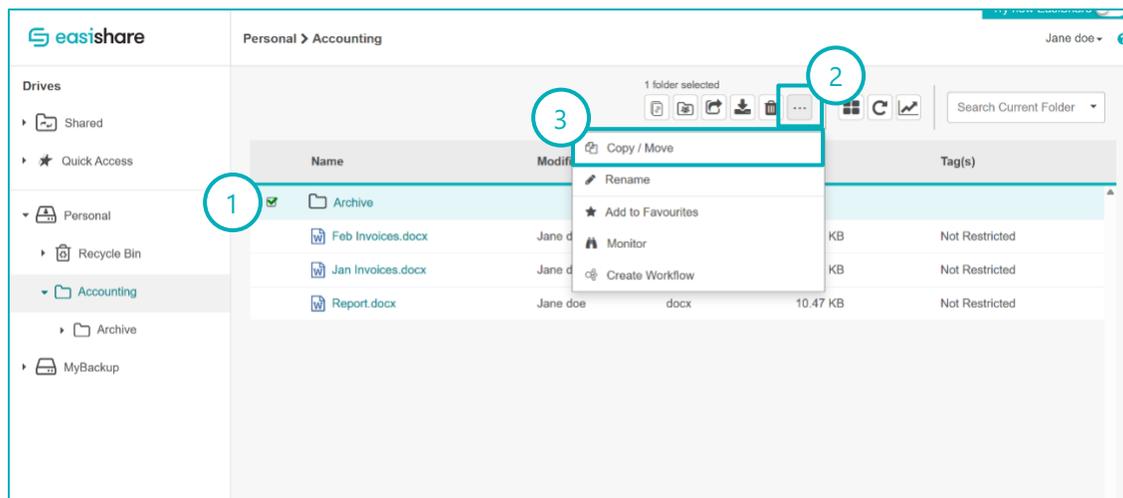


Note:

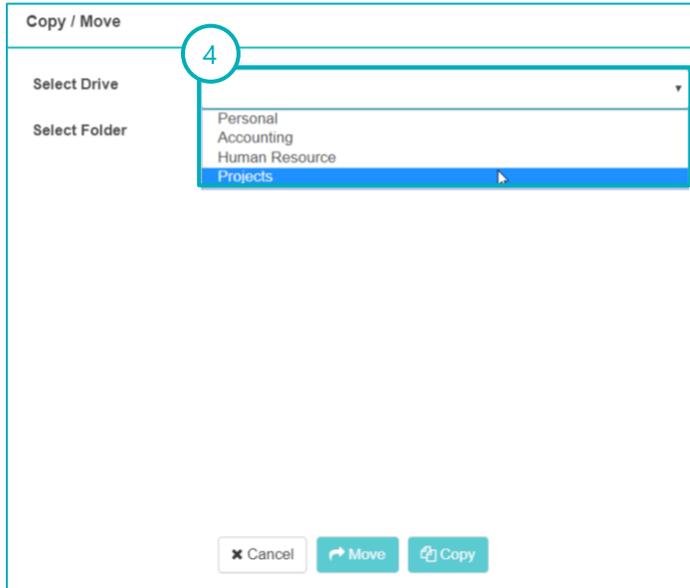
This scenario only applies if customer has implemented Virus scanning in EasiShare. If not turned on, then ignore this scenario.

3.3 Copy/Move

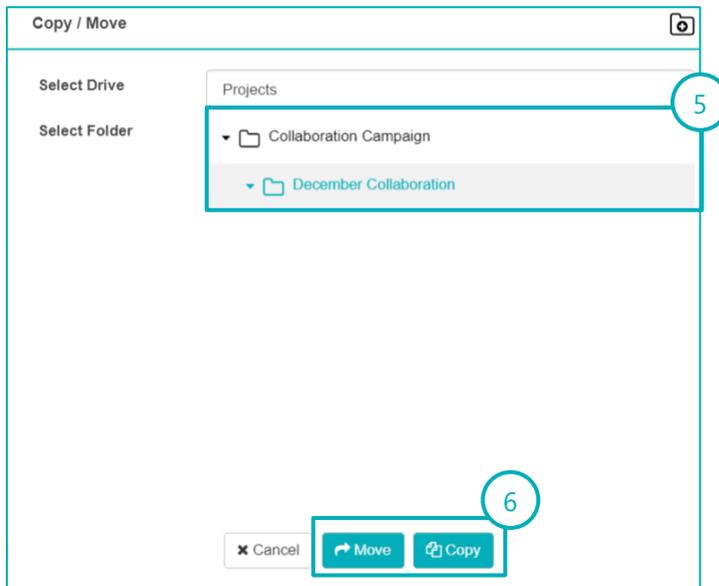
- Select the file(s)/folder(s) that you want to copy/move. To do so, hover mouse over and click on the checkbox to the left of the file/folder icon. You may select multiple file/folder(s) at a time.
- Click on More in the toolbar.
- Click on the Move/Copy option in the dropdown menu.



4. Select a drive in the Select Drive drop down list.



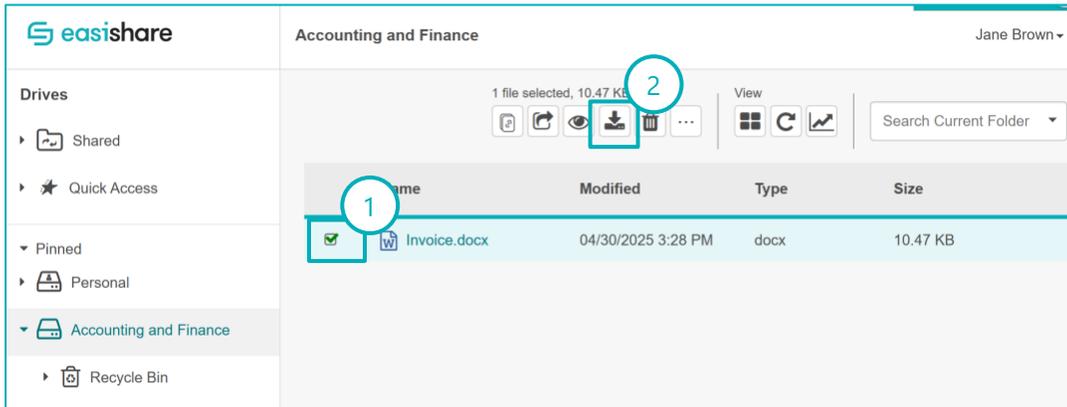
5. Select the folder you wish to move/copy in the Select Folder List.
6. Click on Move/Copy button located at the bottom.



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

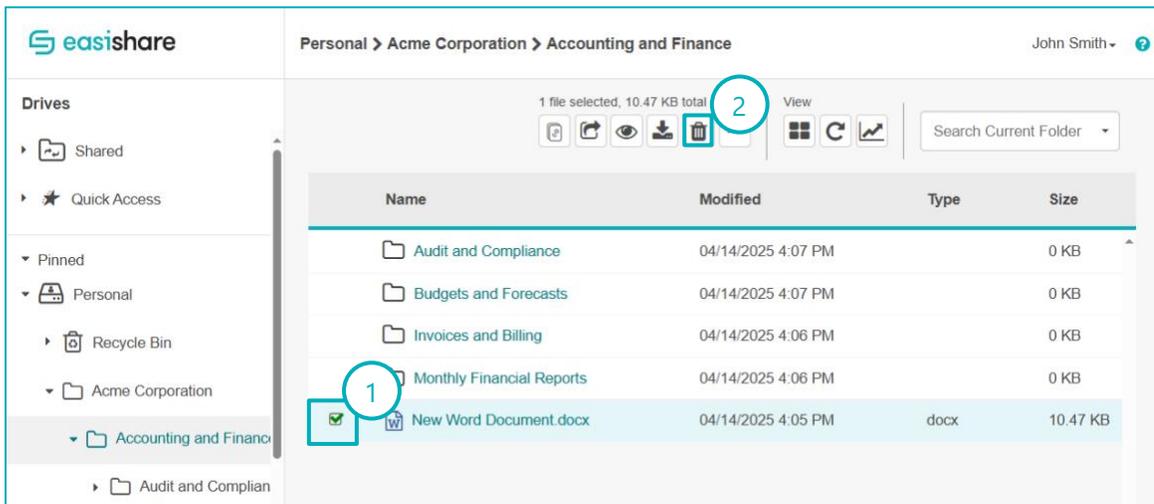
3.4 Download

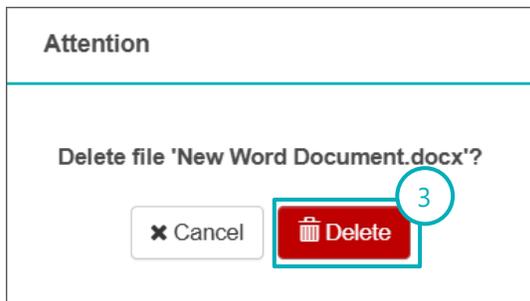
1. Select the file/folder(s). To select, click on the checkbox beside the file/folder(s) name. You may select multiple file/folder(s) at a time.
2. Click on Download  in the toolbar.



3.5 Delete

1. Select the file/folder(s). To select, click on the checkbox beside the file/folder(s) name. You may select multiple file/folder(s) at a time.
2. Click on Delete  in the toolbar.
3. Click Delete to confirm the deletion

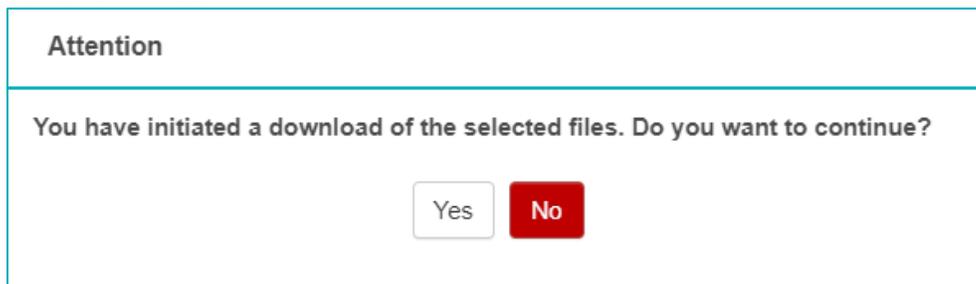




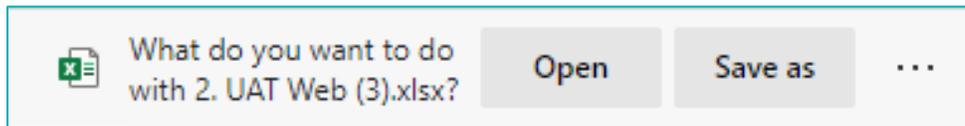
3.6 Recycle Bin

The Recycle Bin temporarily stores deleted files and folders from the drive they were removed from. Items in the Recycle Bin continue to occupy space on the drive until they are removed. The following features are available when you go to the Recycle Bin  of a drive and select the file(s)/folder(s).

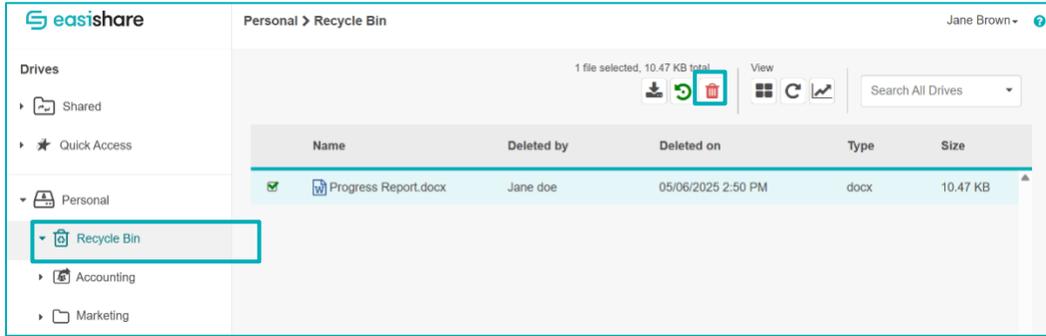
- Download
 1. The user can proceed to download the deleted file(s)/folder(s) in his Recycle Bin in Local Drive/PC by clicking the Download  icon.
 2. A pop up will appear as follows, Click on 'Yes'.



3. The file will be downloaded, and a prompt will appear in the browser.



- Restore
 1. Users can restore deleted items from his Recycle Bin to the original storage drive of the document by clicking on the Restore  icon.
 2. The file(s)/folder(s) will be restored in the original drive.

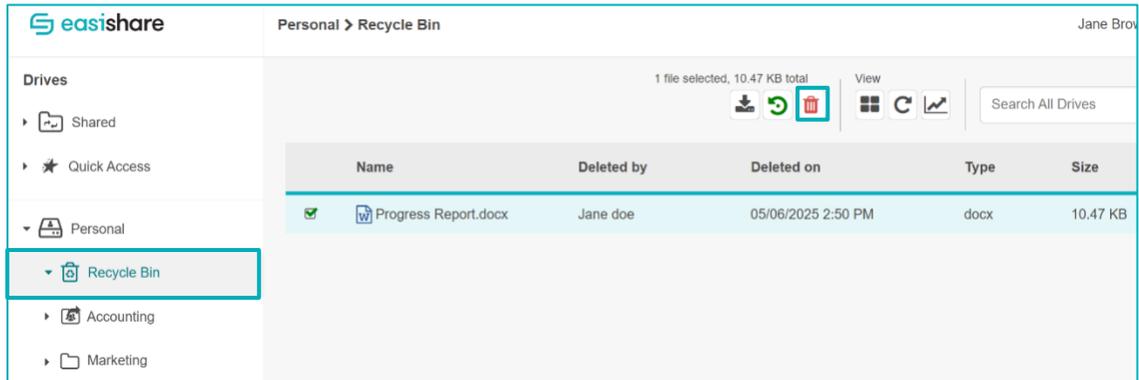


- Delete

1. Users can delete the items permanently from their Recycle Bin by clicking the Delete  icon in the toolbar.
2. The pop-up below would be displayed for the user to confirm the deletion process.
3. If the user clicked Cancel, the action will be cancelled, and file will stay in the Recycle Bin.
4. If the user clicked Delete, the file will be removed permanently from the server.

Note:

A copy will be reserved in the Admin’s Recycle Bin if the organisation has Admin Recycle Bin feature turned on.



Attention

Are you sure you want to permanently delete file 'Progress Report.docx'?



3.7 Copy Path

1. Select the file/folder(s). To select, click on the checkbox beside the file/folder(s) name. You may select multiple file/folder(s) at a time.
2. Click on Copy Path in the toolbar.
3. Users can proceed to paste this path link into an email draft and send it to internal collaborators for easy access.

The screenshot illustrates the EasiShare web portal interface. On the left, the 'Drives' sidebar shows a tree view with 'Accounting and Finance' selected. The main content area displays a file list table with columns for Name, Modified, Type, and Size. The file 'New Word Document.docx' is selected, and its checkbox is marked with a '1'. The toolbar above the table shows the 'Copy Path' icon, which is circled with a '2'. Below the screenshot, an email draft form is shown with the 'Subject' field containing the path 'New Word Document.docx', which is circled with a '3'.

Name	Modified	Type	Size
Audit and Compliance	04/14/2025 4:07 PM		0 KB
Budgets and Forecasts	04/14/2025 4:07 PM		0 KB
Invoices and Billing	04/14/2025 4:06 PM		0 KB
Monthly Financial Reports	04/14/2025 4:06 PM		0 KB
<input checked="" type="checkbox"/> New Word Document.docx	04/14/2025 4:05 PM	docx	10.47 KB

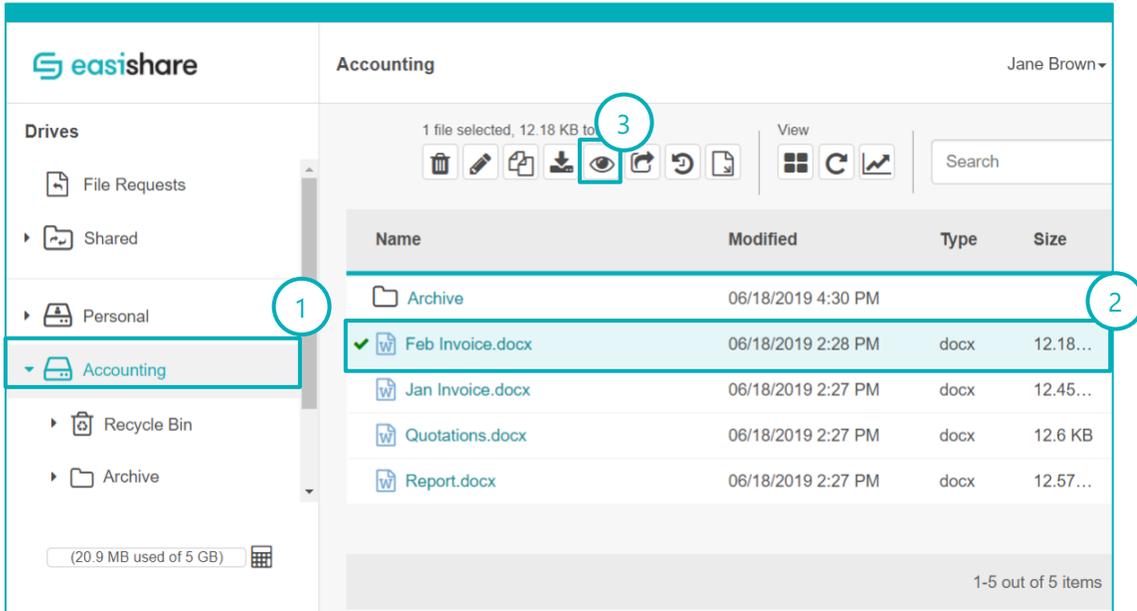
Send To:
Cc:
Subject:

3.8 Preview

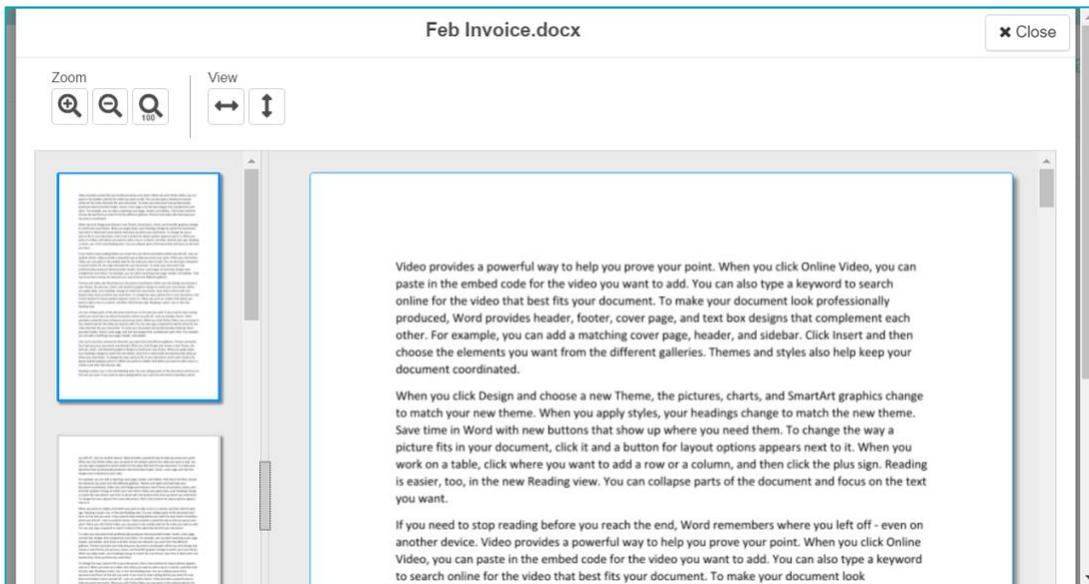
1. Select the file. To select, click on the checkbox beside the file name.



2. Select the Preview  in the toolbar.



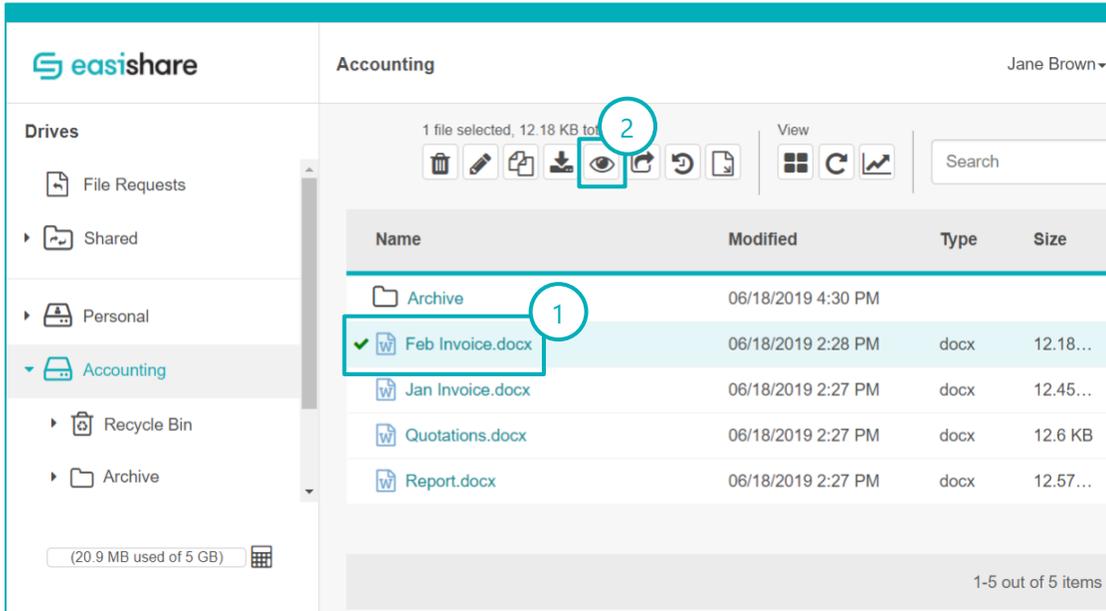
A pop-up box will appear with the preview of the file.



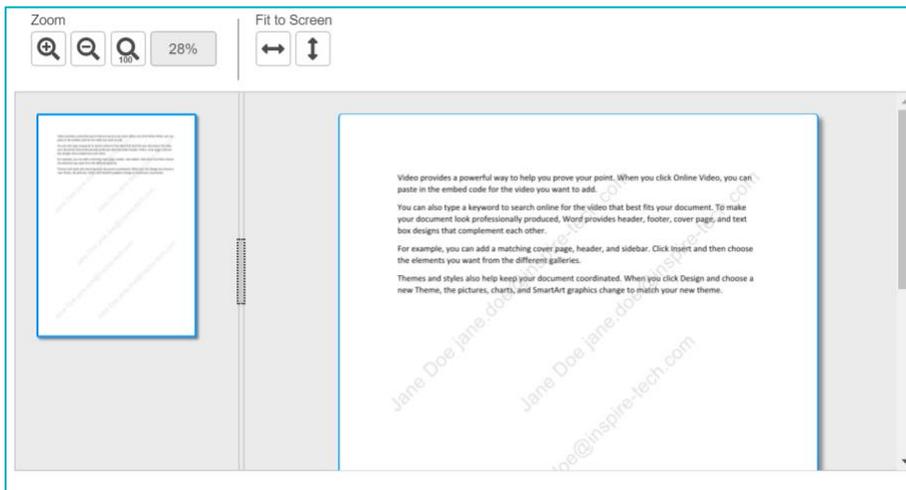
3.9 Preview a File with No Download Permissions

1. Select the file. To select, click on the checkbox beside the file name.

- Select the Preview  in the toolbar.



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



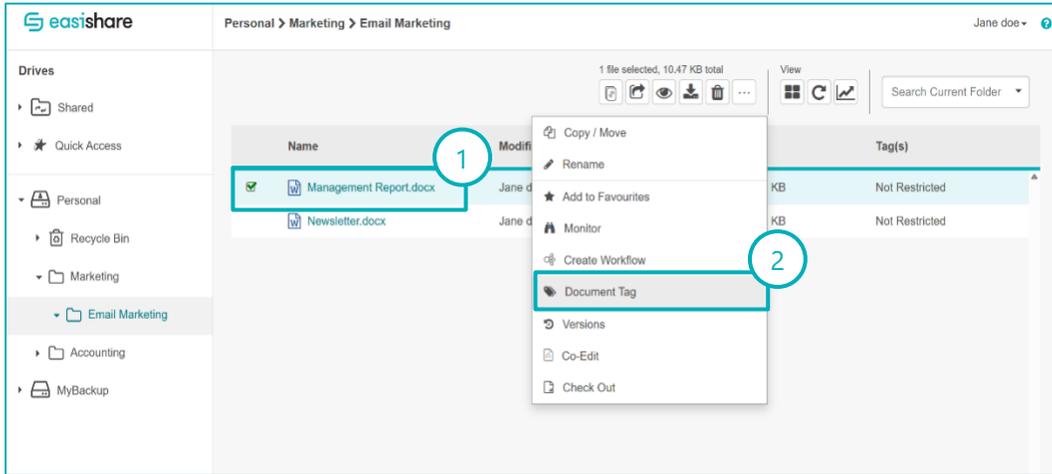
Note: Users with No Download Permissions previewing a file will have a watermark displaying the user's name and email address.

3.10 Document Tag

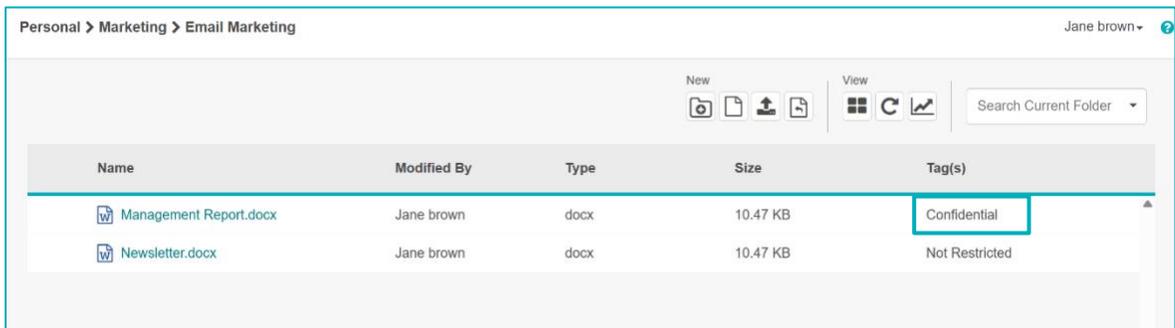
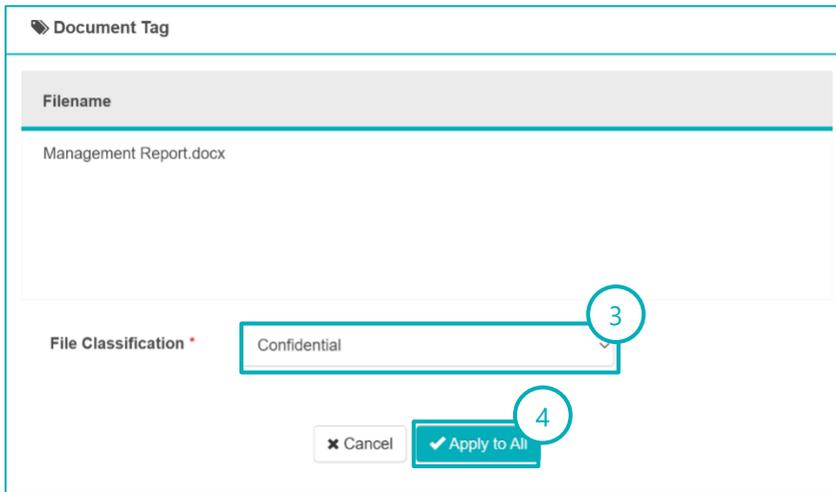
The Document Tag function allows users to apply tags to files, provided the feature is enabled for the organisation. These tags may include sharing restrictions, as defined by the administrator. Tagging may also be mandatory during the file upload process.



1. Select the file. To select, click on the checkbox beside the file name.



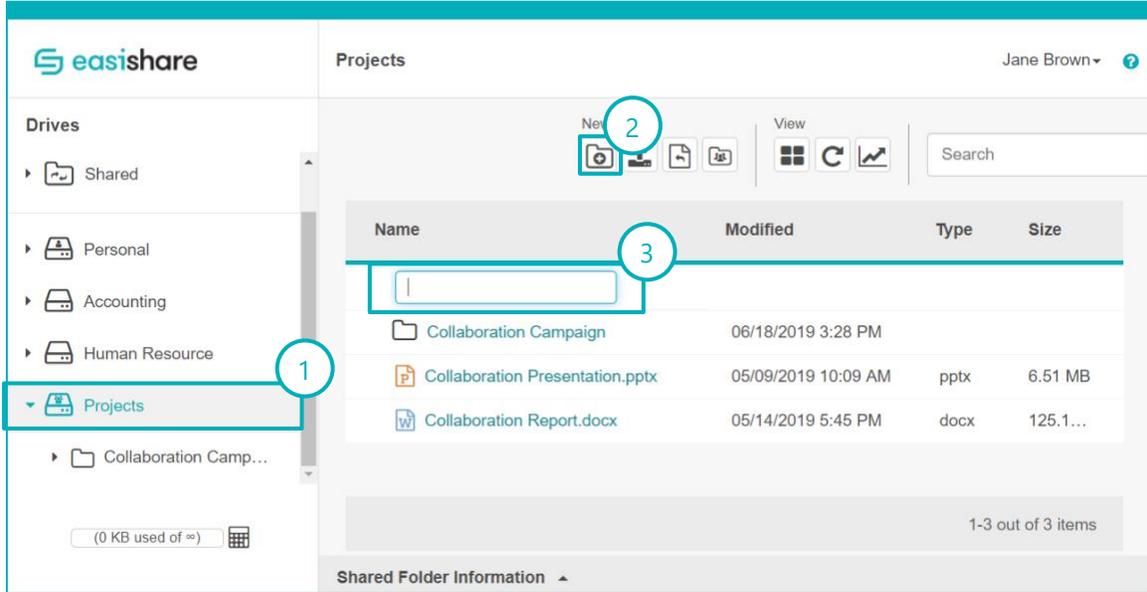
2. Click on Document Tag  in the toolbar.
3. Choose the appropriate tags for this file.
4. Click Apply to All to tag the file with the selected tags.



4 Folder Operations

4.1 Create a New Folder

1. Click on a drive located in the Drive List along the left panel to navigate to the new folder's location.
2. Click on New Folder  icon in the toolbar.
3. Enter folder name in the input box.



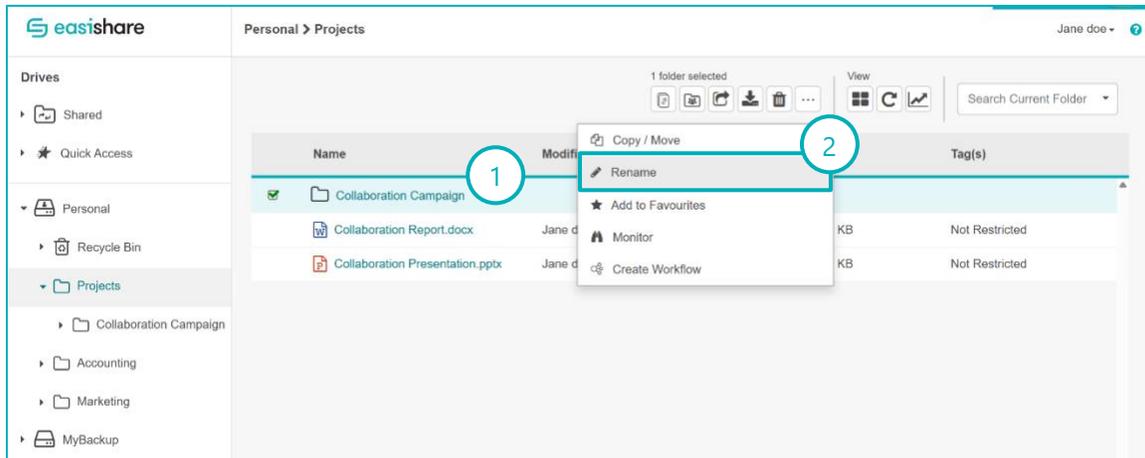
The screenshot shows the EasiShare web portal interface. The left sidebar displays a list of drives: Shared, Personal, Accounting, Human Resource, and Projects. The 'Projects' drive is selected and highlighted with a red box labeled '1'. The main content area shows the 'Projects' folder view. The toolbar includes a 'New' button with a folder icon, which is highlighted with a red box labeled '2'. Below the toolbar is a table with columns: Name, Modified, Type, and Size. The table contains three items: 'Collaboration Campaign', 'Collaboration Presentation.pptx', and 'Collaboration Report.docx'. A red box labeled '3' highlights the input field for the new folder name in the table header. The bottom of the interface shows 'Shared Folder Information'.

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...

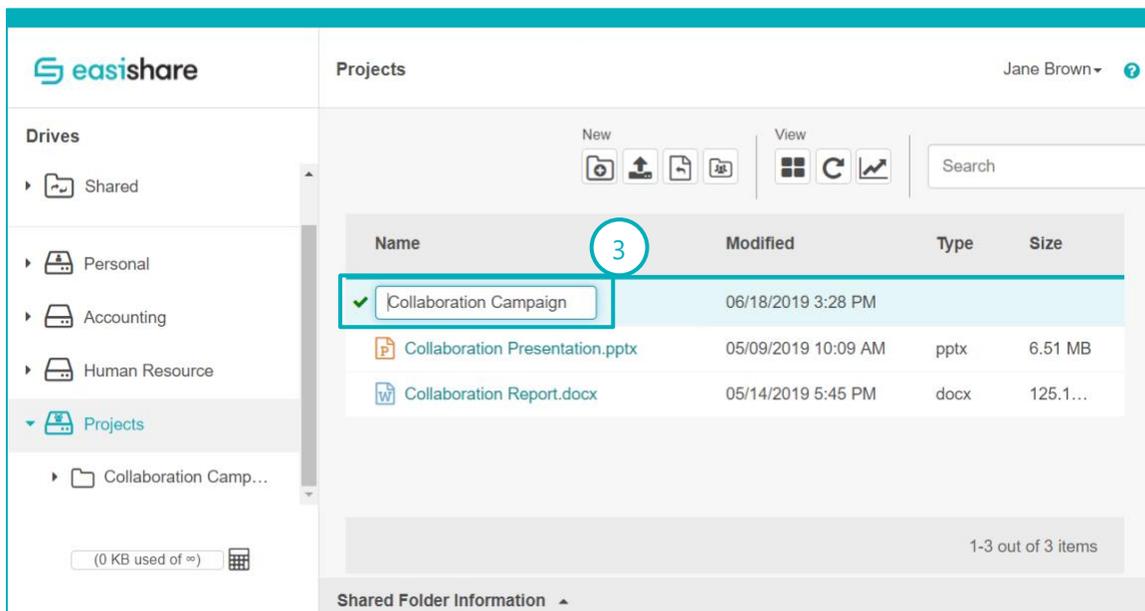


4.2 Rename a Folder

1. Select the folder. To select, click on the checkbox beside the folder name.
2. Click on Rename  in the toolbar.



3. Enter new folder name.
4. Press Enter

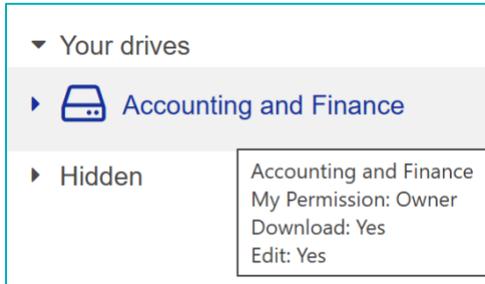


5 Drive Operations

For users who have many drives in the drives list, it would be helpful to rearrange and group the drives. These functions do not affect the permissions and are for organising purposes only, except for Remove My Access for shared drives. This is covered in Section [Remove My Access from Shared Drive](#).

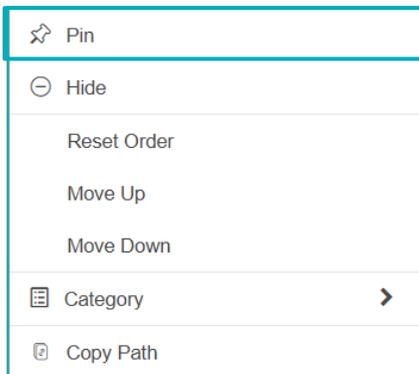
5.1 View Drive Permissions

To view your permission to the drive, you can hover your mouse over the drive and the permission appears in the tooltip.



5.2 Pin

1. Select the drive from Your Drives section
2. Right click the drive
3. Click Pin
4. The drive will be in Pinned section

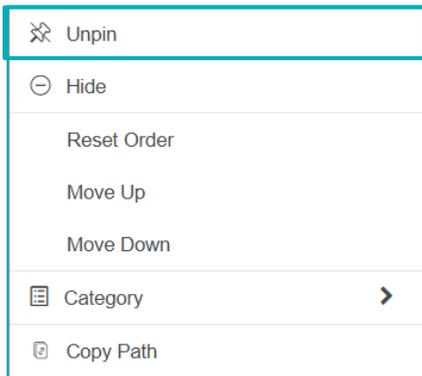


5.3 Unpin

1. Select the drive from Pinned section
2. Right click the drive
3. Click Unpin

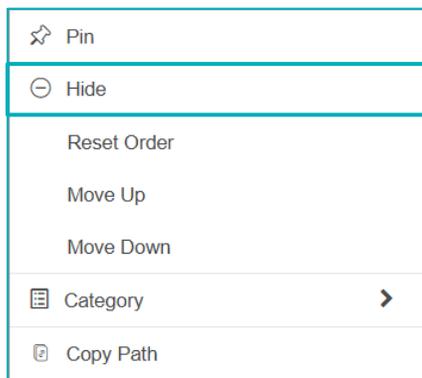


- The drive will be in Your Drives section



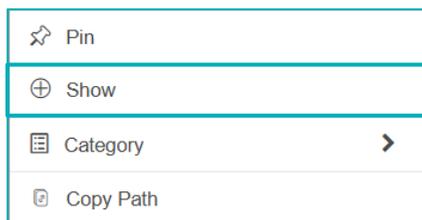
5.4 Hide

- Select the drive from Your Drives section
- Right click the drive
- Click Hide
- The drive will be in Hidden section



5.5 Show

- Expand the Hidden section
- Select the drive
- Right click the drive
- Click Show
- The drive will be in Your Drives section

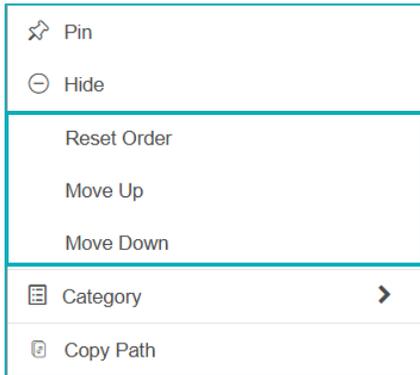


5.6 Move Up, Down and Reset Order

This section is applicable to the Pinned and My Drives section only.

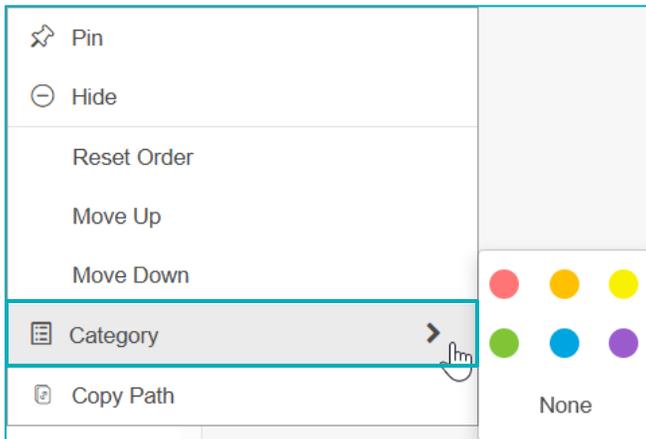
- Select the drive

2. Right click the drive
3. Choose one of the following options
 - a. Move Up: Shifts the drive one position higher in the list.
 - b. Move Down: Shifts the drive one position lower in the list.
 - c. Reset Order: Restores the drive to its original/default position in the list.



5.7 Category Colours

1. Select the drive.
2. Right click the drive.
3. Hover over Category in the context menu.
4. Select a colour from the available options.
 - a. To remove a colour, select None



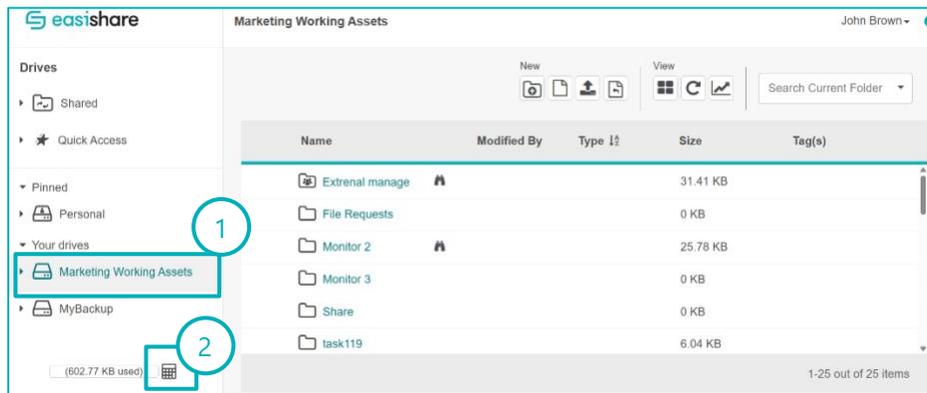
5.8 Recalculate Drive

The Recalculate Drive function performs a scan of your selected drive to:

- Update storage usage, including total drive size and individual folder sizes.
- Check for missing or newly added files
- Refresh file paths, ensuring the drive correctly reflects the current file structure.

Steps:

1. Select the drive you want to update.
2. Click on the Current Drive Usage icon 
3. Click Recalculate Now.

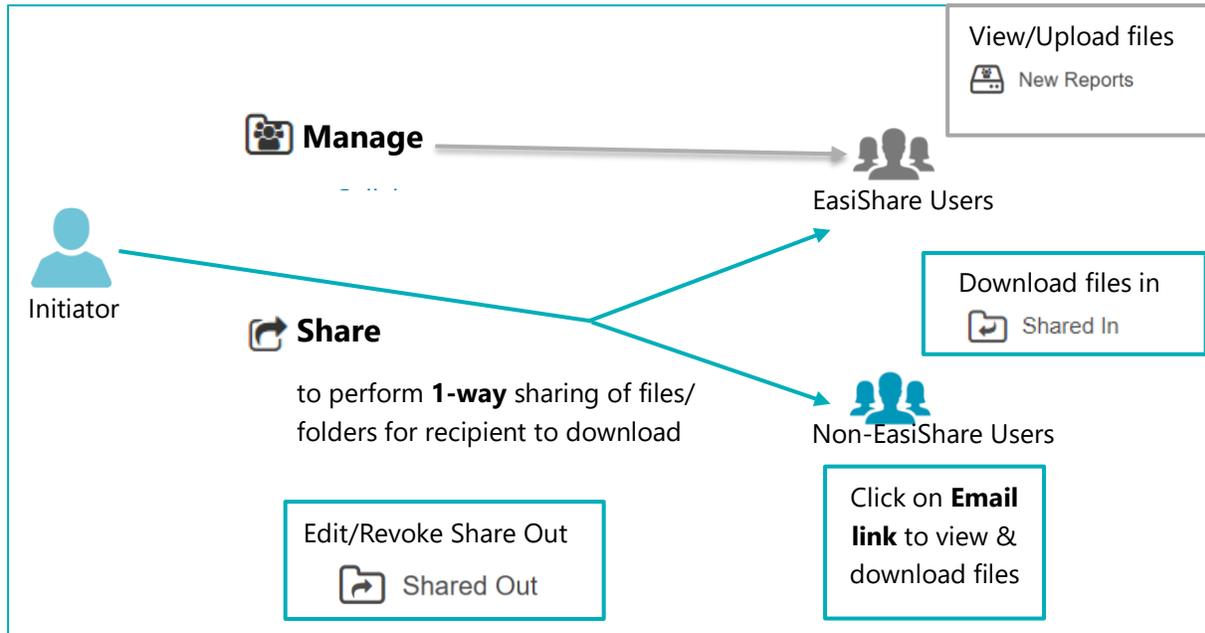


Name	Modified By	Type	Size	Tag(s)
Extrenal manage			31.41 KB	
File Requests			0 KB	
Monitor 2			25.78 KB	
Monitor 3			0 KB	
Share			0 KB	
task119			6.04 KB	

Current Drive Usage

Current Drive Usage
581.17 MB used
Calculated at 02/05/2025 16:05

6 Share



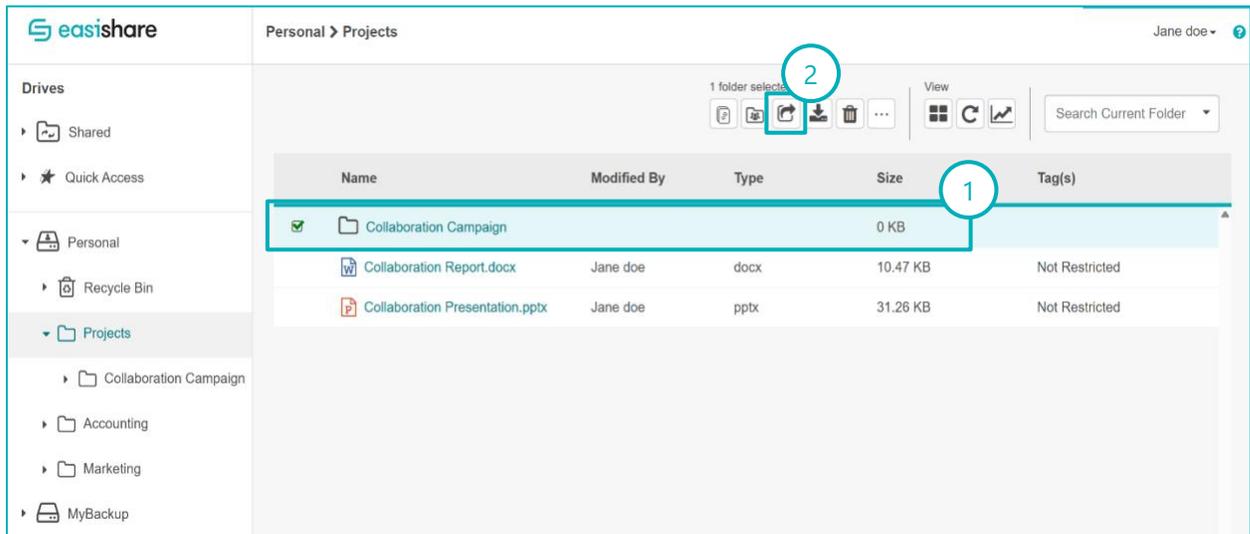
Scenarios & How to use the functions

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. Refer to Section Collaboration Permission Types to view the permission types.	Login as user & click on Shared Drives with a different icon. e.g. New Reports

6.1 Share

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 users, please use the Manage function. For a detailed guide, do refer to Section [Manage Folder for Collaboration](#) 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  in the toolbar.



3. Enter the recipient's name, email, and/or contact number. The contact number is only mandatory if you wish to enable One-Time Password (OTP) authentication; otherwise, you may leave it blank. If you provide a contact number, please ensure that the correct country code is included.

Tips:

- Internal users are indicated by a human-shaped icon 
- External users are indicated by a human-shaped icon with an arrow 
- To select an internal user, start typing the user's name; matching results will appear. Click on the user to add them to the recipient list and you may skip step 4.
- External users/groups will only appear in the search results after you have shared with them at least once.

4. Click  to confirm recipient. Alternatively, you can press enter.

Tip: 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 Recipients at 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 Recipients 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 two or more recipients with at least one external user, click on Manage Recipient on the top right corner, then click on Create Group.
8. Enter your message (optional).
9. Enable/Disable the settings you wish to apply. To find out in details how each feature works, refer to the respective sections below.
10. Select checkbox to agree to your organisation's terms and conditions.
11. Click Share.

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

- 3**: Points to the input field for the recipient username / name to share.
- 4**: Points to the 'Mobile Phone No.' input 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 'Message' text area.
- 10**: Points to the checkbox for the 'WARNING: CONFIDENTIAL NOTICE'.
- 11**: Points to the 'Share' button.

The interface includes a table for recipient details with columns for Name, Email, and Mobile Phone No. Below the table are settings for Link Expires, OTP, Notifications (Per Download and Summary), No. of Attempts, and Share with View Only. At the bottom, there is a warning message and 'Cancel' and 'Share' buttons.

6.1.1 Share with User Group

1. To begin sharing, refer to Section [Share](#).
2. Begin entering the group name and select the user group which you wish to share.
Tip: After adding the user group, the members of the user group can be displayed by clicking on show/hide members.
3. Enter your message.
4. Enable/Disable settings you wish to apply. To find out in detail how each feature works, refer to the respective sections below.
5. Select checkbox to agree to your organisation's terms and conditions.
6. Click Share.

Share

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

Name	Email	Mobile Phone No.
Sales	show members	
Marketing		
Marketing Group		
Marketing Team		

Link Expires

OTP

Share with View Only

Notifications Immediate Summary

No. of Attempts attempts

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



6.1.2 Share with Download Permission

1. To begin sharing, refer to Section [Share](#).
2. Ensure that the option 'Share with View Only' was not enabled.
3. Select checkbox to agree to your organisation's terms and conditions.
4. Click Share.

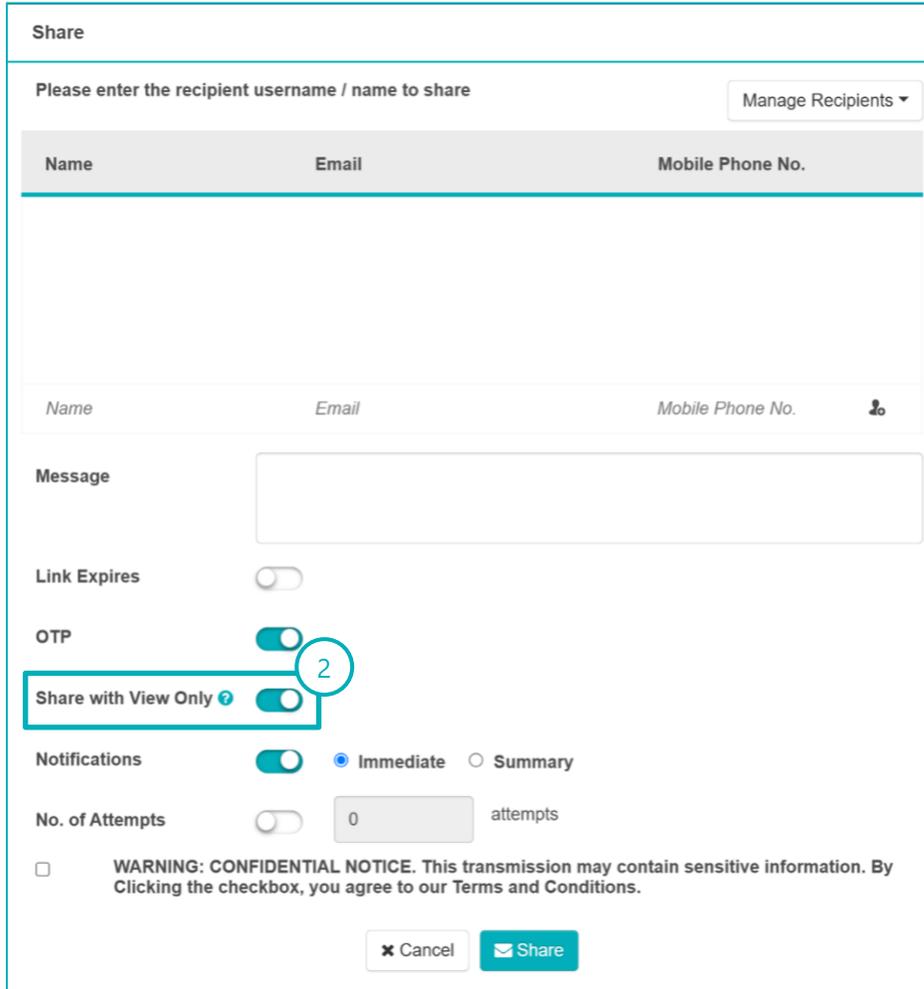
The screenshot shows the 'Share' form with the following elements:

- Share** (Section Header)
- Please enter the recipient username / name to share** (Text) with a **Manage Recipients** dropdown button.
- Table:**

Name	Email	Mobile Phone No.
<i>Name</i>	<i>Email</i>	<i>Mobile Phone No.</i>
- Message** (Text input field)
- Link Expires** (Toggle switch, currently off)
- OTP** (Toggle switch, currently on)
- Share with View Only** (Toggle switch, currently off, circled with '2')
- Notifications** (Toggle switch, currently on) with radio buttons for **Immediate** (selected) and **Summary**.
- No Attempts** (Toggle switch, currently off) with a text input field containing '0' and the word 'attempts'.
- Warning:** **WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By Clicking the checkbox, you agree to our Terms and Conditions.** (Text) with a checkbox circled with '3'.
- Buttons:** **Cancel** and **Share** (circled with '4').

6.1.3 Share with 'View Only' Permission

1. To begin sharing, refer to Section [Share](#).
2. Enable the option Share with View Only.



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

- A header section with the text 'Please enter the recipient username / name to share' and a 'Manage Recipients' dropdown menu.
- A table with three columns: 'Name', 'Email', and 'Mobile Phone No.'. The table is currently empty.
- A 'Message' text area.
- A 'Link Expires' toggle switch, currently turned off.
- An 'OTP' toggle switch, currently turned on.
- A 'Share with View Only' toggle switch, currently turned on, and highlighted with a red box and a circled '2'.
- A 'Notifications' section with a toggle switch turned on and two radio buttons: 'Immediate' (selected) and 'Summary'.
- A 'No. of Attempts' section with a toggle switch turned off and a text input field containing '0' followed by the text 'attempts'.
- A warning message: 'WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By Clicking the checkbox, you agree to our Terms and Conditions.' with an unchecked checkbox.
- At the bottom, there are two buttons: 'Cancel' and 'Share'.

Note:

1. This feature only applies to Microsoft Office documents, PDF documents and images.
2. A watermark will appear on the content viewed by your recipient. Refer to the screenshot in Section [Preview a File with No Download Permissions](#).

6.1.4 Share with Link Expiry

1. To begin sharing, refer to Section [Share](#).
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.

Name Email Mobile Phone No. 

Message

Link Expires 05/15/2025 11:59 PM 

OTP

Share with View Only

Notifications Immediate Summary

No. of Attempts attempts

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

Note:

1. The expiry date and time must 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. To begin sharing, refer to Section [Share](#).
2. Enable OTP.

Share

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

Name	Email	Mobile Phone No.
Name	Email	Mobile Phone No.

Message

Link Expires 05/15/2025 11:59 PM

OTP

Share with View Only

Notifications Immediate Summary

No. of Attempts 0 attempts

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

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 notifications allows the user to be alerted when a recipient downloads or views the file. If this option is enabled and the recipient accesses the file multiple times, the user will receive a notification for each instance.

1. To begin sharing, refer to Section [Share](#).
2. Enable Notifications.

Immediate: An email will be sent to your email inbox whenever a file is accessed

Summary: An email summary of all downloads and previews are sent 15 minutes (default) starting from the time of the first action.

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

- Share** (Title)
- Please enter the recipient username / name to share** (Text) with a **Manage Recipients** dropdown.
- Recipient List Table:**

Name	Email	Mobile Phone No.
Name	Email	Mobile Phone No.
- Message** (Text input field)
- Link Expires:** 05/15/2025 11:59 PM
- OTP:**
- Share with View Only:**
- Notifications:** Immediate Summary
- No. of Attempts:** 0 attempts
- WARNING: CONFIDENTIAL NOTICE.** This transmission may contain sensitive information. By Clicking the checkbox, you agree to our Terms and Conditions.
- Buttons:**

6.1.7 Share with Number of Download Attempts

Enable the number of attempts option to limit the number of times 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 change the number of attempts once the policy is set. After the recipient downloads reaches the limit, the recipient will not be able to download the file.

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

Share

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

Name	Email	Mobile Phone No.
<i>Name</i>	<i>Email</i>	<i>Mobile Phone No.</i> 

Message

Link Expires 05/15/2025 11:59 PM 

OTP

Share with View Only 

Notifications Immediate Summary

No. of Attempts attempts

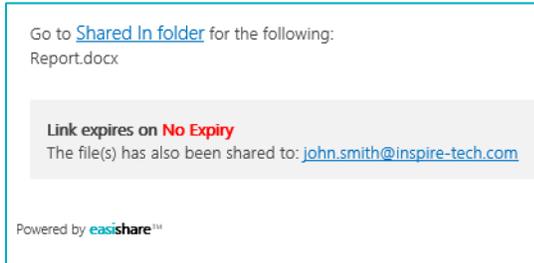
WARNING: CONFIDENTIAL NOTICE. This transmission may contain sensitive information. By Clicking the checkbox, you agree to our Terms and Conditions.



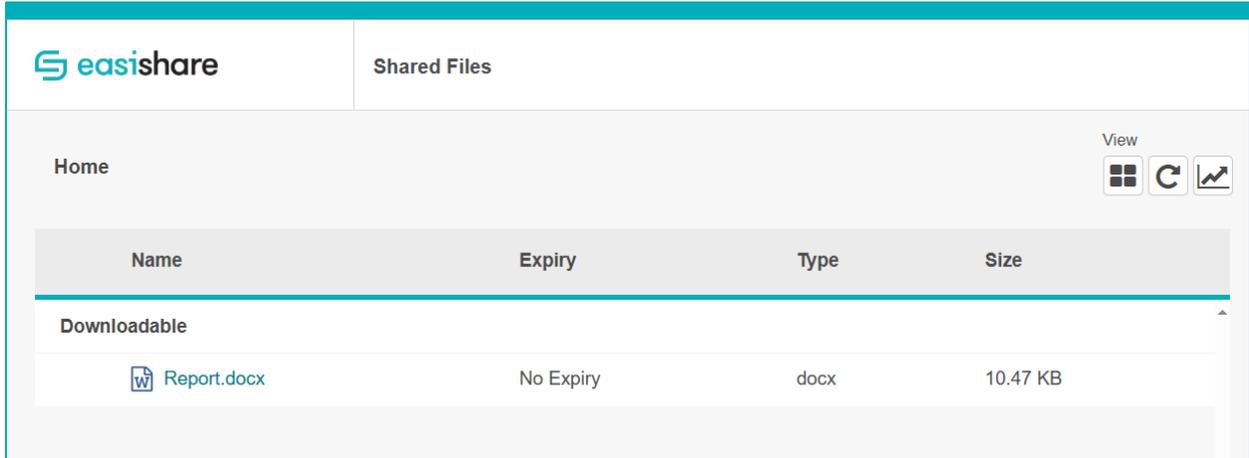
6.2 Access Shared Files/Folders

6.2.1 Email Notifications

Recipients can access the shared file(s) or folder(s) by clicking the link in the email notification.

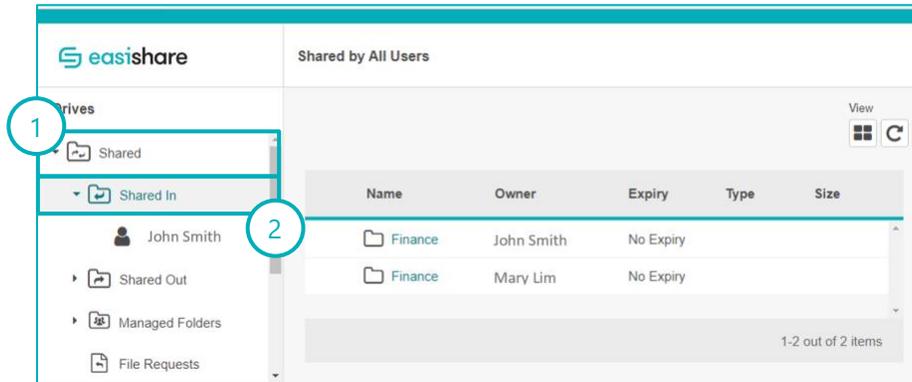


Note: For external recipients, they will only be able to view or download the specific file(s) or folder(s) that you have shared.



6.2.2 Shared In

1. To access file/folder(s) shared by other internal users to you, click on Shared located along the left panel.
2. Click Shared In.

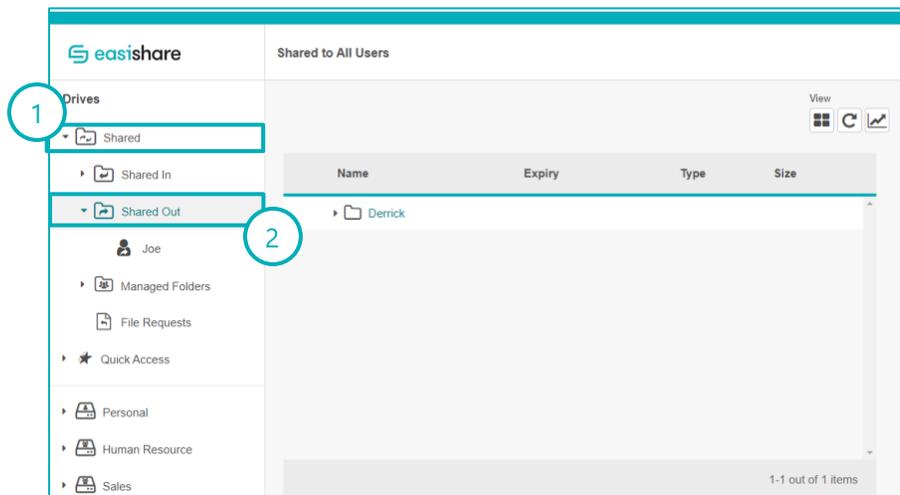


Note: Internal users refer to users who have a registered account in EasiShare.

6.2.3 Shared Out

This section explains how to access file(s) or folder(s) that you have shared one-way with internal or external users.

1. Click Shared located along the left panel.
2. Click Shared Out.



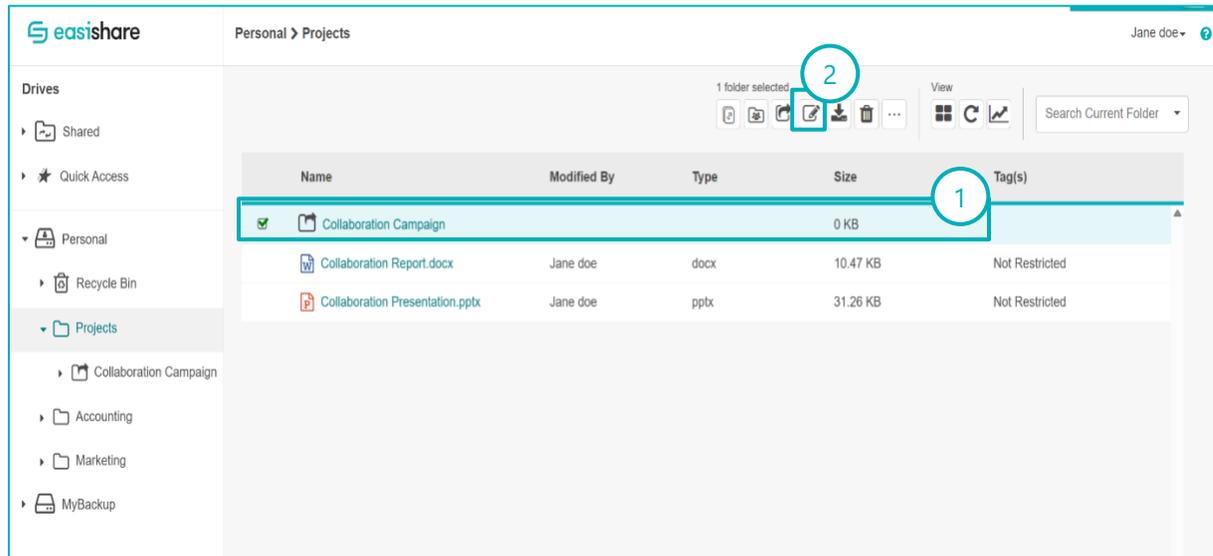
Note: External users refer to users who do not have a registered account in EasiShare.

6.3 Edit/Remove Share

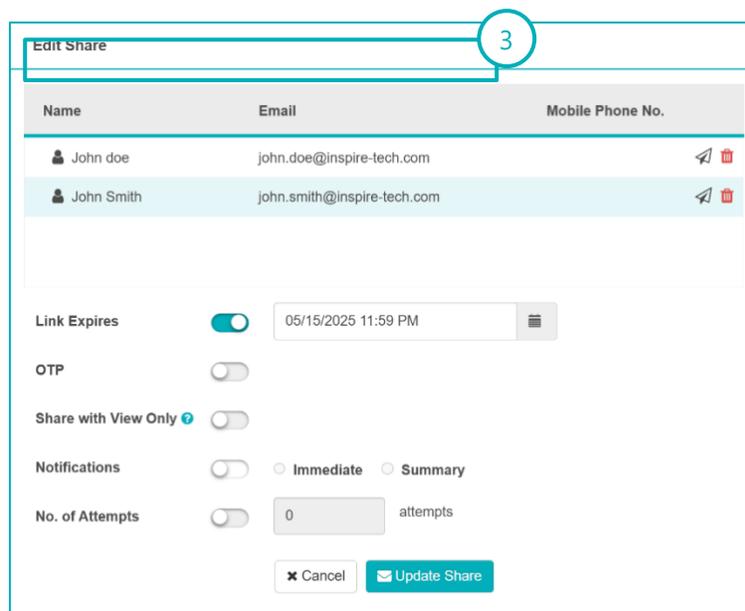
There are two ways to edit share. Edits can be made at the file's original location. Alternatively, you may choose to locate the file by the recipient's name you have shared the file with in the Shared Out drive.

6.3.1 Edit from File's Original Location

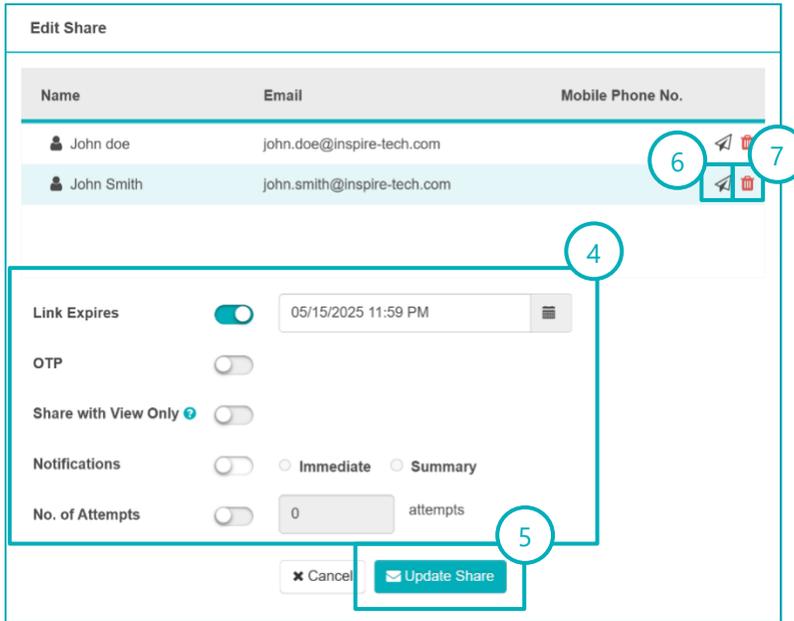
1. Select the file/folder.
2. Click on Edit Share .



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 row that contains the recipient's name.
4. Apply the changes by enabling/disabling the features or changing the date and time of the link expiry. It is also possible to update the No. of Attempts. To find out in detail how each feature works, refer to the respective sections above.



5. Click Update Share to confirm the actions.



The screenshot shows the 'Edit Share' interface. At the top, there is a table with columns for Name, Email, and Mobile Phone No. Below the table is a settings panel with various options. At the bottom, there are 'Cancel' and 'Update Share' buttons. Numbered callouts are placed as follows: 4 points to the settings panel, 5 points to the 'Update Share' button, 6 points to the resend icon, and 7 points to the delete icon.

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

Link Expires: 05/15/2025 11:59 PM

OTP:

Share with View Only:

Notifications: Immediate Summary

No. of Attempts: 0 attempts

Buttons:

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.

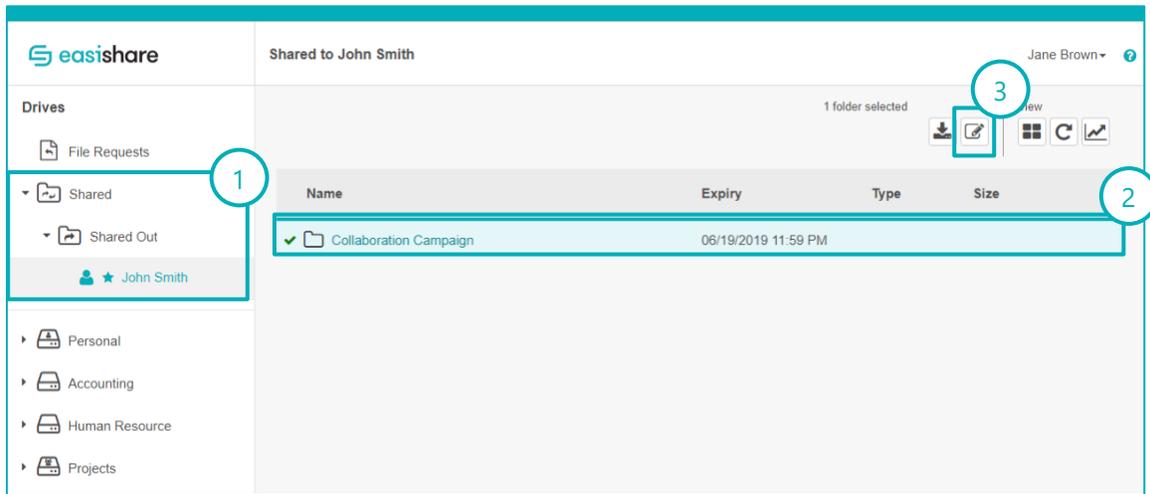
Note:

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



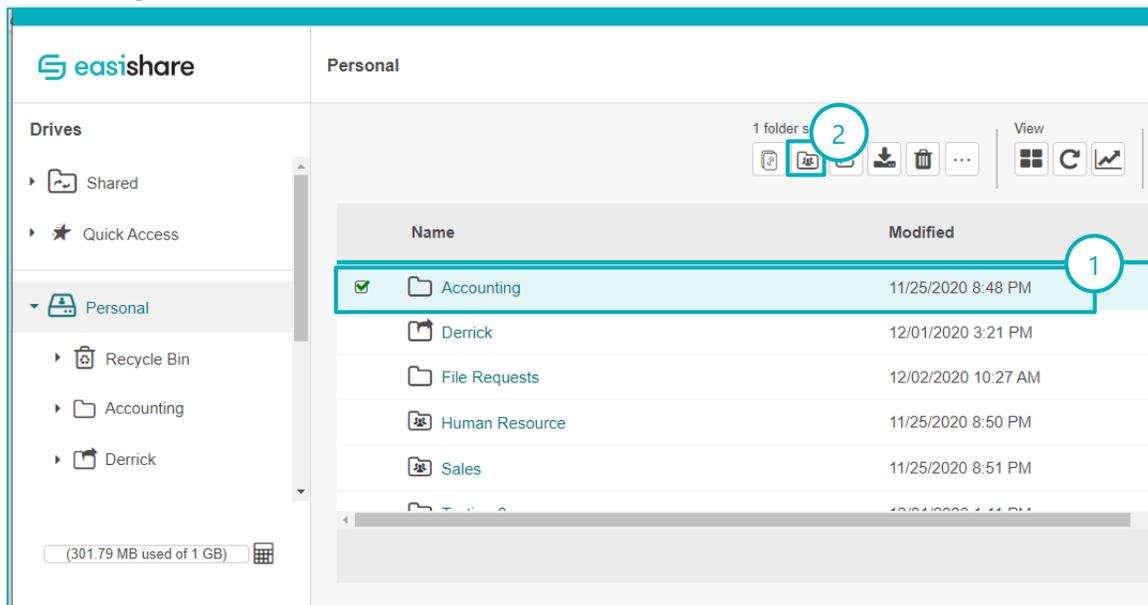
7 Manage Folder for Collaboration

Managed Folder is a folder in EasiShare managed by designated users (owners) who control access permissions for other users to enable collaboration. The following chart shows the different types of permissions available.

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

7.1 Manage Folder

1. Navigate to the folder you wish to collaborate with other users. Select the folder.
2. Click Manage in the toolbar.



3. Enter the recipient's name, email, and/or contact number. The contact number is only mandatory if you wish to enable One-Time Password (OTP) authentication; otherwise, you may leave it blank.

If you provide a contact number, please ensure that the correct country code is included.

Tips:

- Internal users are indicated by a human-shaped icon 
- External users are indicated by a human-shaped icon with an arrow 
- To select an internal user, start typing the user's name; matching results will appear. Click on the user to add them to the recipient list and you may skip step 4.
- External users/groups will only appear in the search results after you have shared with them at least once.

4. Click  to confirm recipient. Alternatively, you can press enter.
Tip: After adding the recipient, the name and mobile number can still be edited by clicking on the  icon.
5. To import multiple recipients, click on Manage Recipients at 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 Recipients 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 two or more recipients with at least one external user, click on Manage Recipient on the top right corner, then click on Create Group.
8. Assign the permission type you wish to give to the user(s)/group(s).
9. If you wish to apply the same permissions that has been set on another folder, select the folder name from the 'Copy from' dropdown list then click on the copy icon 
10. Enable/disable folder expiry if you wish to set an expiry for the folder.
11. Enable/disable OTP verification for external users accessing the folder
12. Enable/disable quota if you wish to limit the folder size.
13. Click Apply.
14. When the permission has been granted, the user will receive an email notification.



Accounting

Copy from: ----- select ----- Manage Recipients

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

Name Email Mobile Phone No.

Options Document Tag Advanced Options

Folder Expiry 05/22/2025 11:59 PM Auto-Delete

OTP

Quota

Close Apply

Manage Recipients

Import Recipient List

Export Recipient List

Create Group

Dear John Smith,

Jane brown has shared a **Accounting** folder.

[Click here](#) to access in EasiShare.

The folder is shared to : John Smith

Powered by easishare™

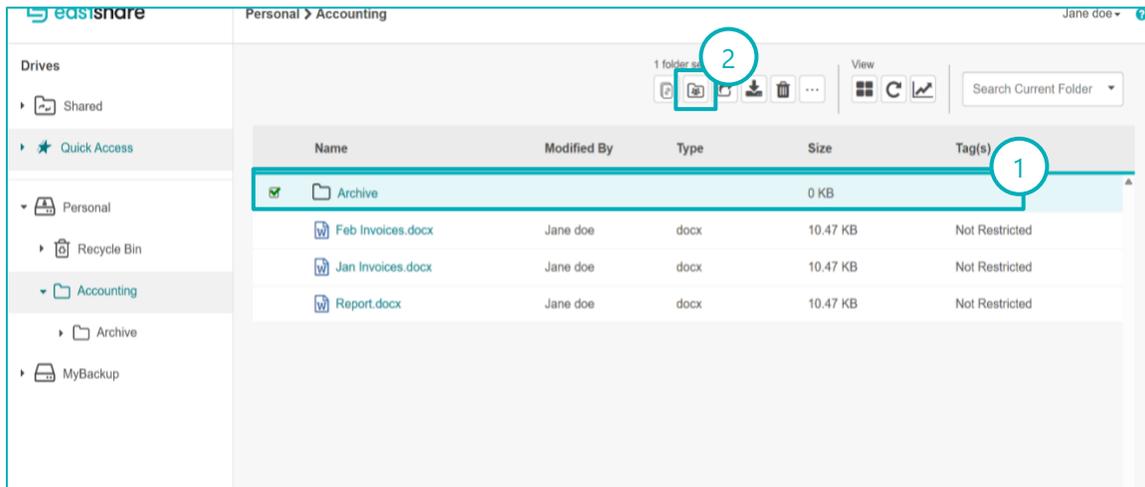
Note:

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 administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.

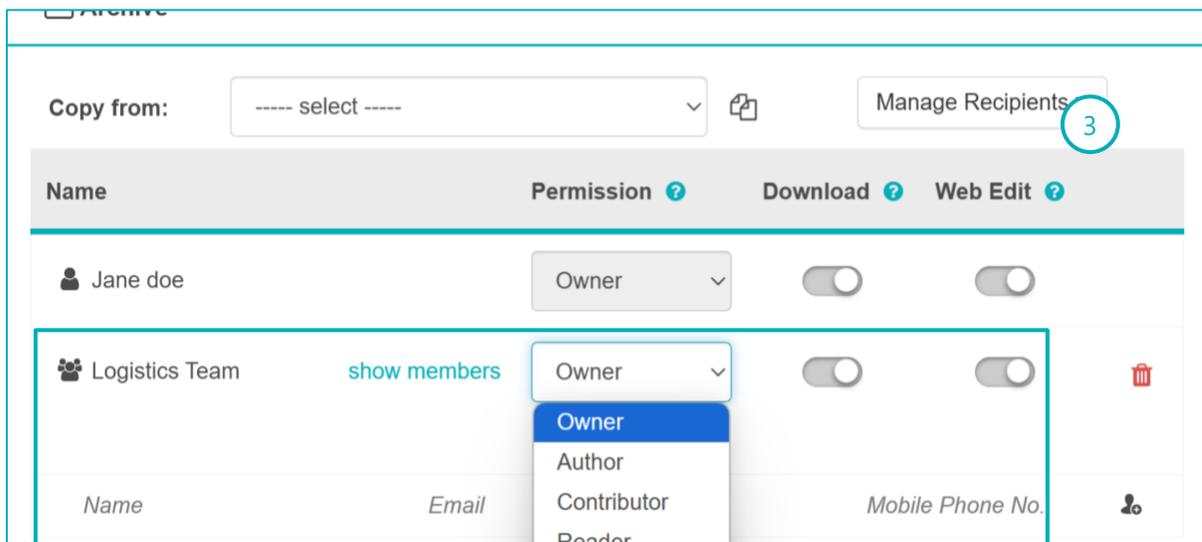


7.2 Manage Folder to User Groups

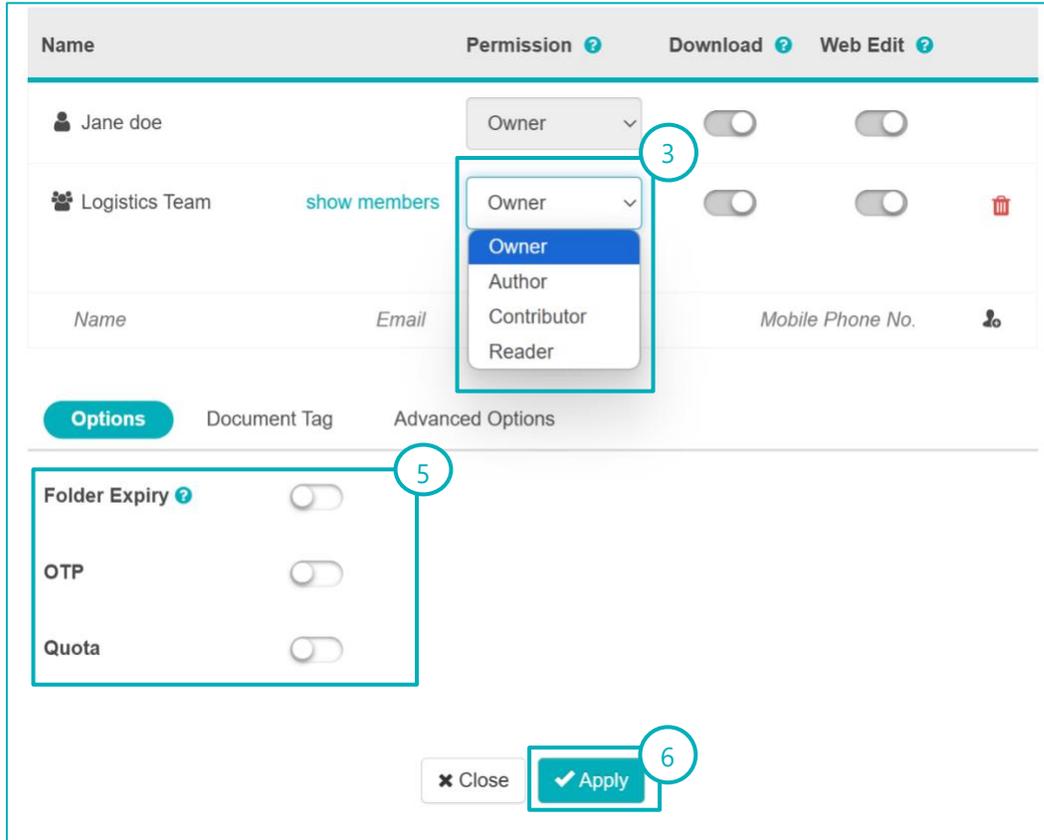
1. Navigate to the folder intended for collaboration and select it.
2. Click on Manage  in the toolbar.



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



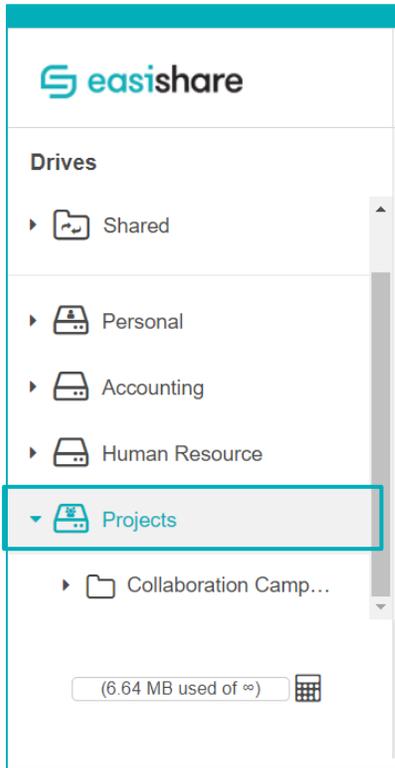
4. Enable/disable the necessary settings.
5. Click Apply.



The screenshot displays the user management interface. At the top, there are columns for 'Name', 'Permission', 'Download', and 'Web Edit'. The first row shows 'Jane doe' with 'Owner' permission and two toggle switches. The second row shows 'Logistics Team' with 'Owner' permission, two toggle switches, and a delete icon. A dropdown menu is open for the 'Logistics Team' user, showing options: 'Owner' (selected), 'Author', 'Contributor', and 'Reader'. Below the table, there are tabs for 'Options', 'Document Tag', and 'Advanced Options'. The 'Options' tab is active, showing three toggle switches: 'Folder Expiry', 'OTP', and 'Quota'. At the bottom, there are 'Close' and 'Apply' buttons.

7.3 Access Shared Drive as An Internal User

1. A Shared Drive is a folder shared to you for collaboration. It is labelled with a different icon  in the drives list.
2. You may access the Shared Drive by clicking on it.
3. Once your permission has been revoked, you will no longer see the files and folders under the Shared Drive.



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



7.4 Shared Drive Information

1. Click on a shared drive denoted by the icon 
2. The shared drive information will appear at the bottom of the page.

Managed Folder Information ▾

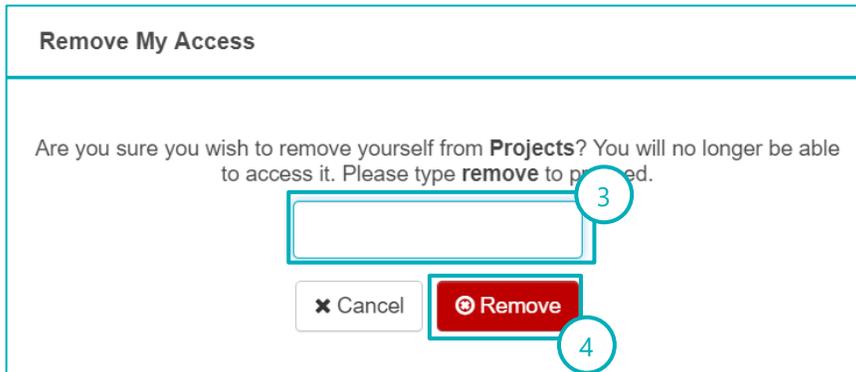
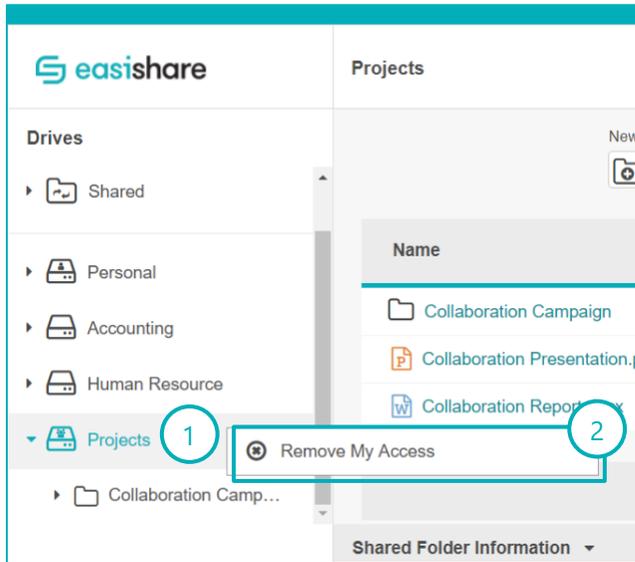
Owner(s) : John Smith	My Permission : Author Download: No Web Edit: No	Expiry Date : No Expiry	Quota : N/A
---------------------------------	--	-----------------------------------	-----------------------

Shared Folder Information	Description
Owner(s)	Displays the designated user(s) who manages the folder.
My Permission	Displays the current access level assigned to the user for the selected folder
Download	Allow users to download files from the folder to their local device.
Web Edit	Allows users to open and edit files directly in the browser without downloading
Expiry Date	Indicates the date when the user's access to the folder will expire.
Quota	Shows the maximum storage space allocated for the folder.

7.5 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.

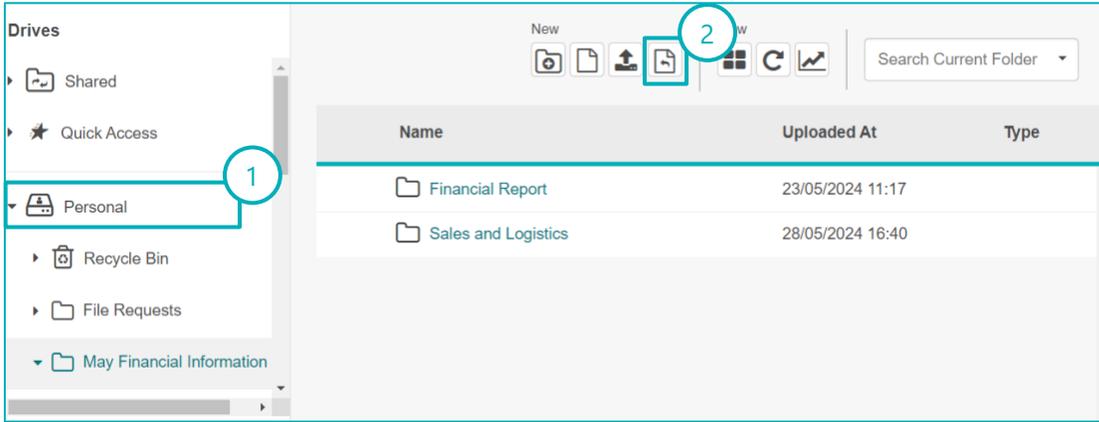
1. Right click the Shared Drive that you wish to remove.
2. Click on Remove My Access.
3. Type remove.
4. Click Remove.



8 File Request to Receive Files from External Users

8.1 File Request

1. Begin by selecting the drive where the file will be uploaded.
2. Select New File Request  in the toolbar.



3. Enter the title of the file request.
4. Enter the recipient's name, email, and/or contact number. The contact number is only mandatory if you wish to enable One-Time Password (OTP) authentication; otherwise, you may leave it blank. If you provide a contact number, please ensure that the correct country code is included.

Tips: External users are indicated by a human-shaped icon with an arrow . To select an external user, start typing the user's name; matching results will appear only after you have requested files from them at least once. Click on the user to add them to the recipient list and you may skip the next step.

5. Click on  to confirm recipient. Alternatively, you can press Enter.
6. To import multiple recipients, click on Manage Recipients at 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 Recipients on the top right corner, then click on Create Group.
9. Enter your message (optional).



New File Request

Enter the title of your file request... 3

Manage Recipients 6

- Import Recipient List 7
- Export Recipient List 8
- Create Group 8

Name	Email	Mo
<input type="text"/>	<input type="text"/>	<input type="text"/>

4 5

Options **Advanced Options**

9 Message

10 Link Expires 04/28/2025 11:59 PM

OTP

Notifications Per Upload Summary

Options **Advanced Options**

No. of attempts attempts 10

File size limit

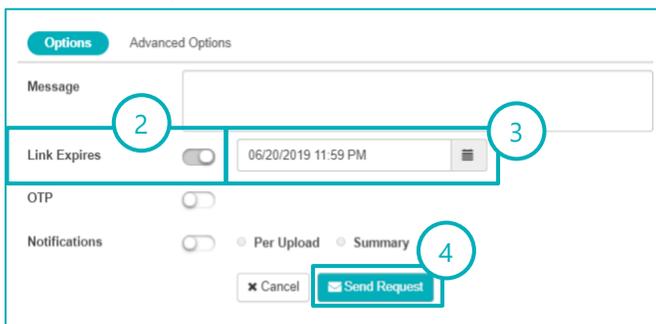
File type restrictions Allow all except Block all except

11

10. Enable/disable the settings you wish to apply. For details on how each feature work, refer to respective sections below. More settings are available under Advanced Options.
11. Click Send Request.

8.1.1 File Request with Link Expiry

1. To begin requesting files, refer to Section [File Request](#).
2. Enable Link Expires
3. Set the date and time by clicking on the calendar icon
4. Click Send Request.



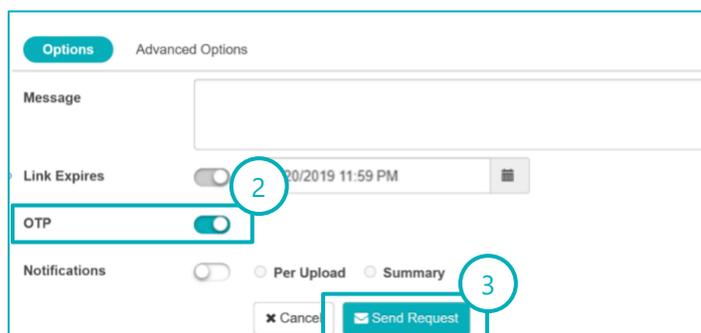
The screenshot shows the 'Advanced Options' section of a file request form. It includes a 'Message' text area, a 'Link Expires' toggle switch (checked), a date and time picker showing '06/20/2019 11:59 PM', an 'OTP' toggle switch (unchecked), and 'Notifications' options for 'Per Upload' and 'Summary'. At the bottom are 'Cancel' and 'Send Request' buttons. Circled numbers 2, 3, and 4 highlight the 'Link Expires' toggle, the date/time picker, and the 'Send Request' button respectively.

Note:

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. To begin requesting files, refer to Section [File Request](#)
2. Enable OTP.
3. Click Send Request.



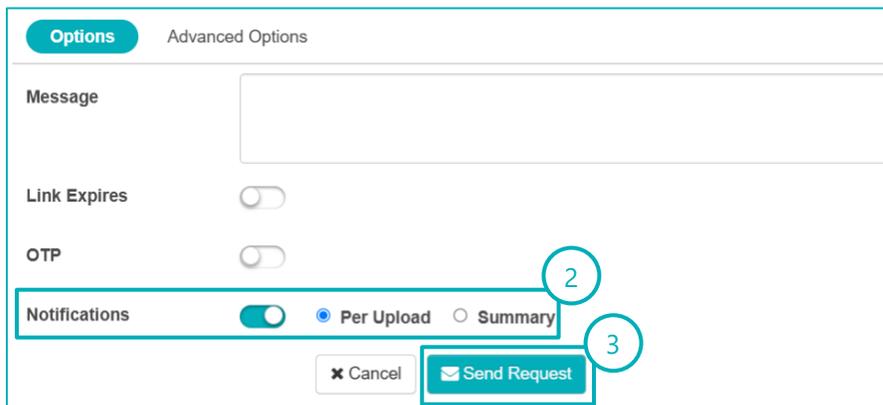
The screenshot shows the 'Advanced Options' section of a file request form. It includes a 'Message' text area, a 'Link Expires' toggle switch (unchecked), a date and time picker showing '06/20/2019 11:59 PM', an 'OTP' toggle switch (checked), and 'Notifications' options for 'Per Upload' and 'Summary'. At the bottom are 'Cancel' and 'Send Request' buttons. Circled numbers 2 and 3 highlight the 'OTP' toggle and the 'Send Request' button respectively.

Note:

- To enable OTP, contact number field is mandatory.
- 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

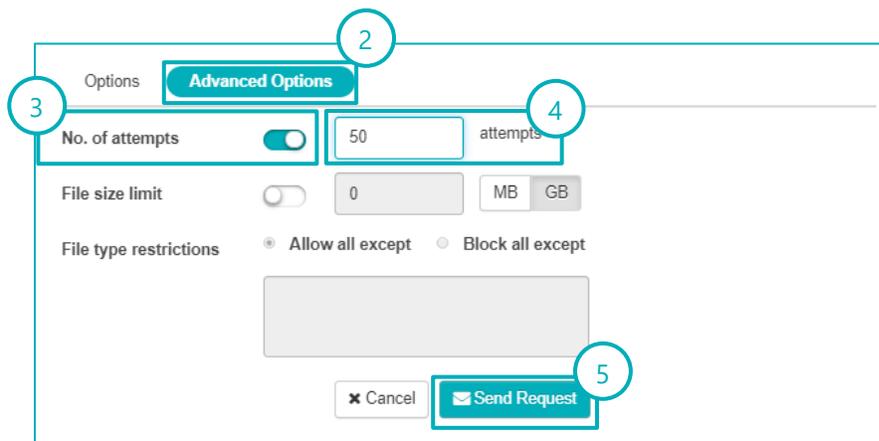
1. To begin requesting files, refer to Section [File Request](#)
2. Enable Notifications.
Per Upload: An email will be sent to your email inbox whenever a file is uploaded
Summary: An email summary of all uploads are sent 60 minutes (default) starting from the time of the first upload.
3. Click Send Request.



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

8.1.4 Restrict Number of Upload Attempts

1. To begin requesting files, refer to Section [File Request](#).
2. View more settings by clicking Advanced Options.
3. Enable No. of attempts.
4. Specify the number of attempts you wish to limit.
5. Click Send Request.



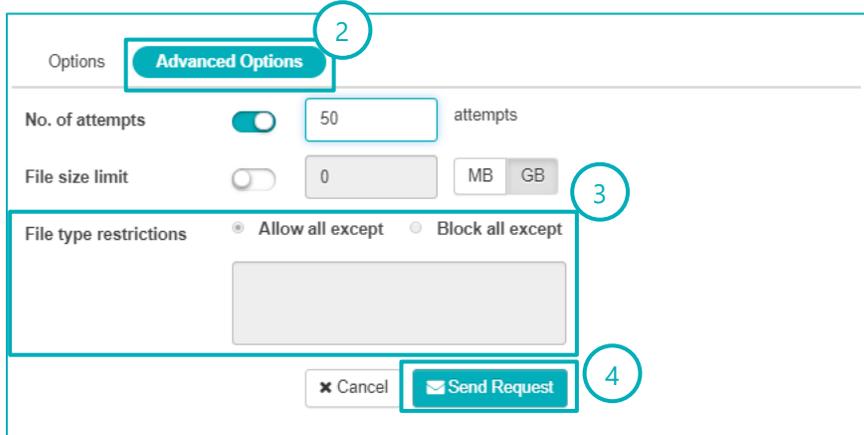
The screenshot shows the 'Advanced Options' dialog box. The 'No. of attempts' section is highlighted with a red box and a circled '3'. The 'Send Request' button is highlighted with a red box and a circled '5'. A circled '2' points to the 'Advanced Options' tab, and a circled '4' points to the '50' input field.

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 Restricted File Types

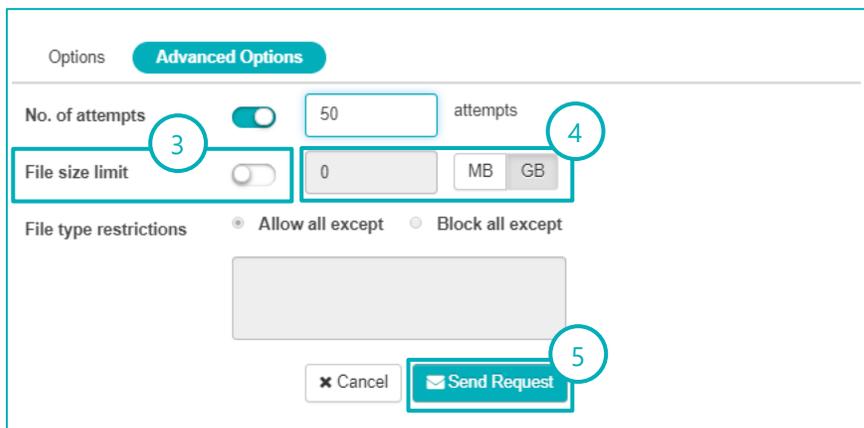
1. To begin requesting files, refer to Section [File Request](#).
2. View more settings by clicking Advanced Options.
3. View File Type Restrictions.
4. Click Send Request.



Note: This feature is controlled by your central administrator. The file type restrictions are set by the organisation policy settings.

8.1.6 Limit File Size Upload

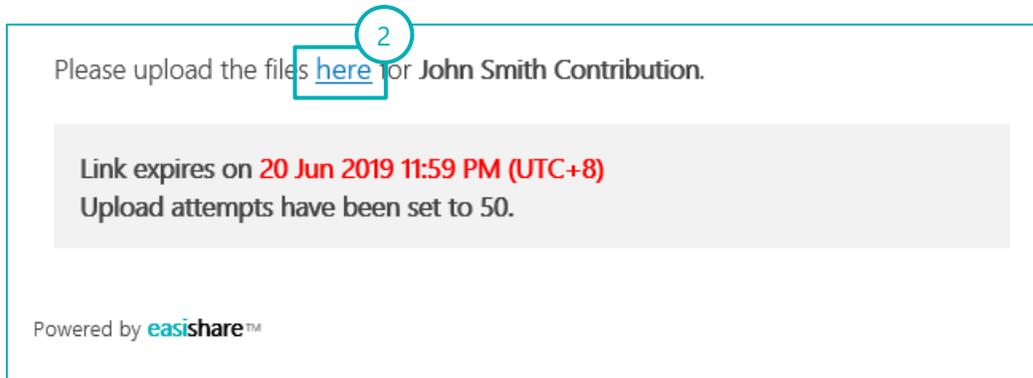
1. To begin requesting files, refer to Section [File Request](#).
2. View more settings by clicking Advanced Options.
3. Enable File Size Limit
4. Specify the file size limit and select either MB or GB.
5. Click Send Request



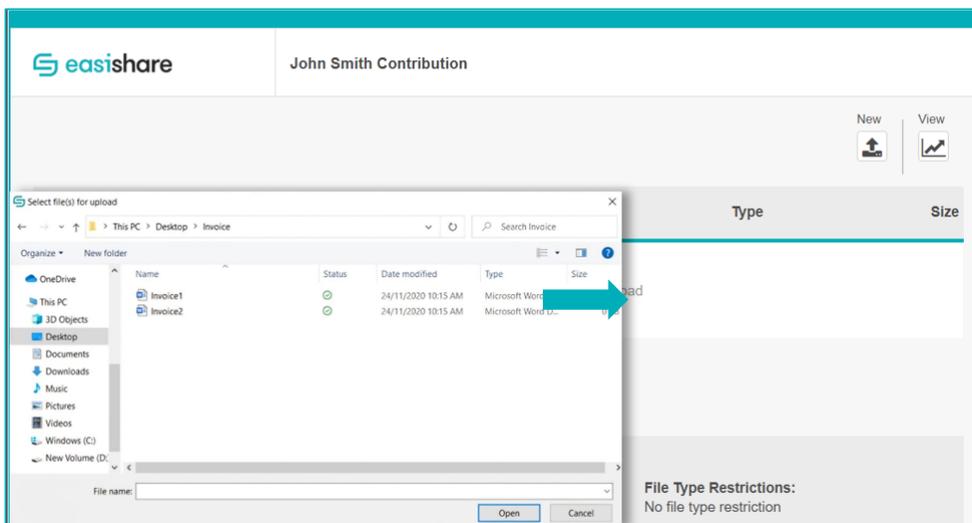
Note: This feature may be controlled by your central administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.

8.2 Upload Files Using File Request

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

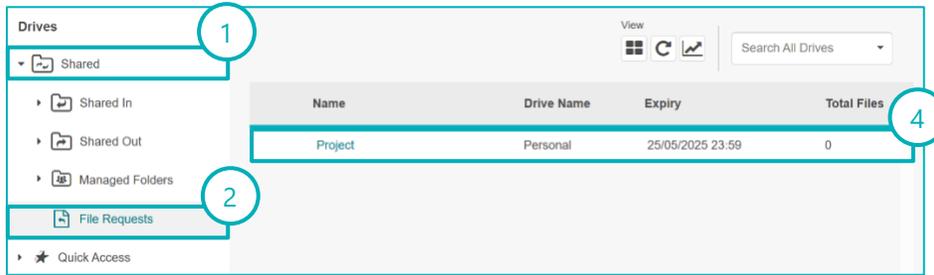


3. The recipient will be directed to the upload page.
4. Click on Upload File or simply drag and drop the files into the empty area.



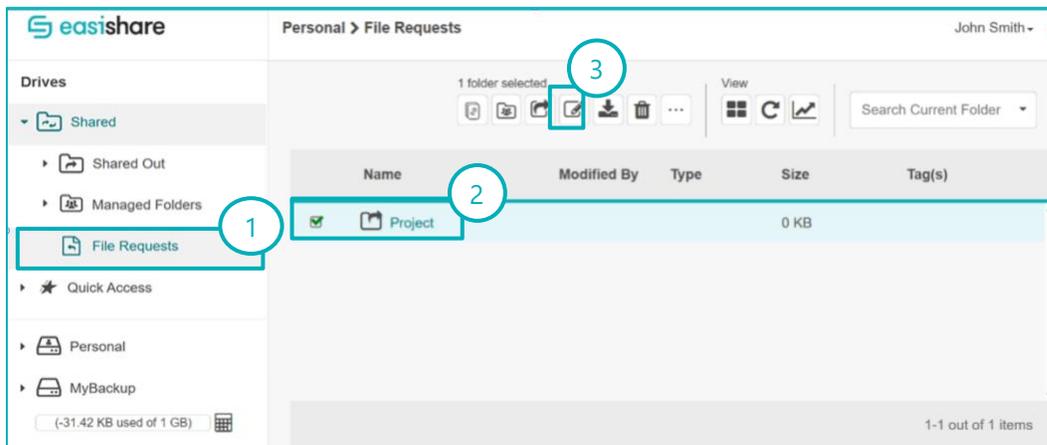
8.3 Access Uploaded Files

1. Click on Shared located along the left panel.
2. Click on File Requests.
3. Click on the title of the file request you wish to access. You will be redirected to the folder.
4. Select the file to perform download or other file operations.



8.4 Edit File Request

1. Select File Requests along the left panel.
2. Choose an active File Request to edit.
3. Click Edit File Request  in the toolbar.
4. A window will appear, follow the steps in each bubble for each intended purpose.
5. Click on the Update button.





Edit Request

File Request title: John Smith Contribution

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

Options | Advanced Options

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

OTP:

Notifications: Per Upload Summary

To resend email
Click to resend email to guest user

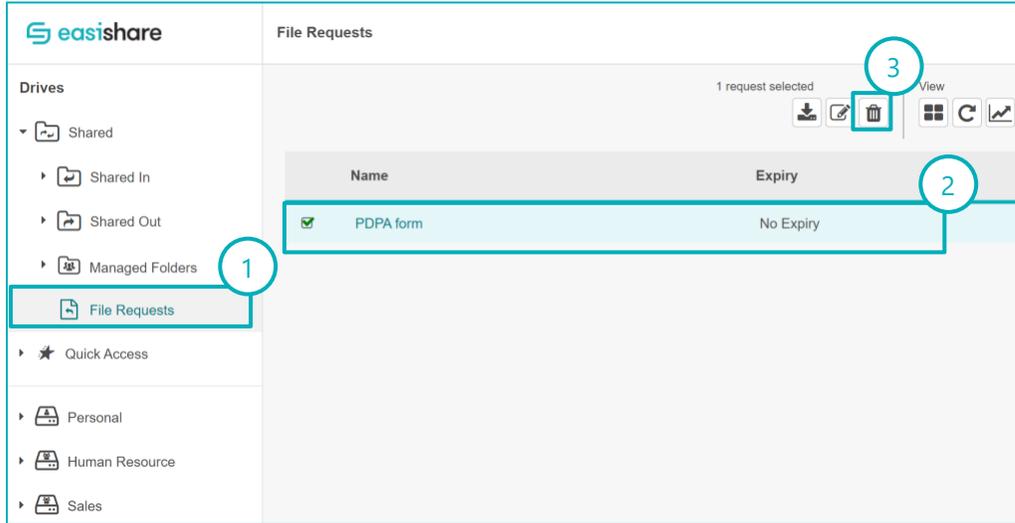
To remove one of the guest users
1. Click on delete icon
2. Click on Update button to remove one of the guest users

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 Requests under Shared.
2. Choose an active File Request to revoke.
3. Click Revoke File Request  located at the toolbar.
4. A confirmation window will appear, click Delete to proceed with File Request Revoke.





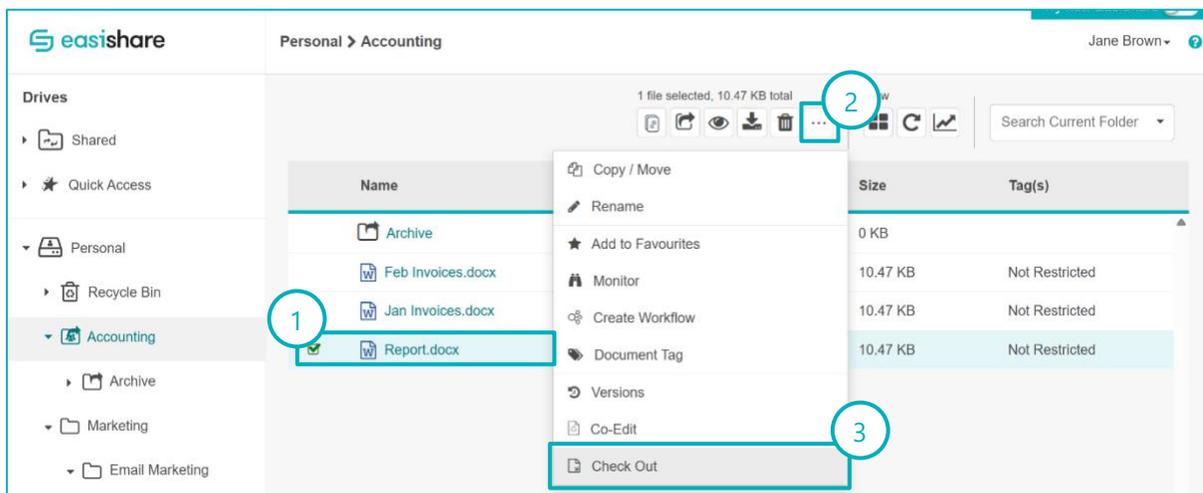
9 Check In/Out

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, users can upload the new version and check in. After the file has been checked in, other users can use the updated version to continue their editing.

Action	Meaning	Purpose
Check Out	Lock the file for editing. Others can't edit until you check it back in.	Prevents multiple people from editing the same file at once.
Check In	Save your changes and release the file so others can edit it.	Updates the file with your changes and makes it available.
Discard	Cancel the check-out without saving any changes you made.	Useful if you changed your mind or made a mistake while editing.

9.1 Check Out a File

1. Select the file you wish to check out.
2. Click on More 
3. Click 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.

- 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.

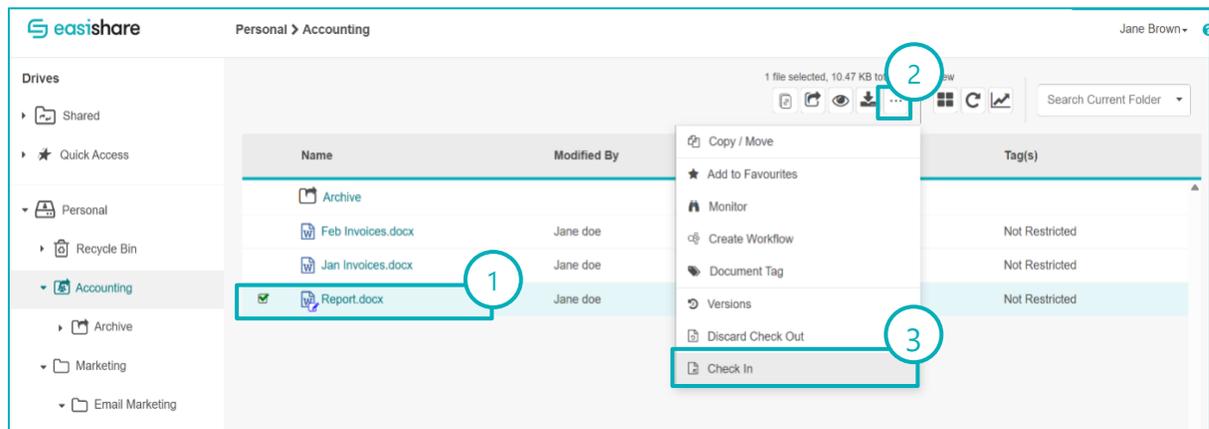
File Versions					
No.	Uploaded	Modified	Modified By	Size	Comments
0.4	05/05/2025 5:4...	05/05/2025 10:...	Jane Brown	10.47 KB	
0.3	05/05/2025 5:3...	05/05/2025 10:...	Jane Brown	10.47 KB	
0.2	05/05/2025 5:3...	05/05/2025 10:...	Jane Brown	10.47 KB	
0.1	05/05/2025 10:...	05/05/2025 10:...	Jane Brown	10.47 KB	

1-4 out of 4 items

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 More 
3. Click on Check In 



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

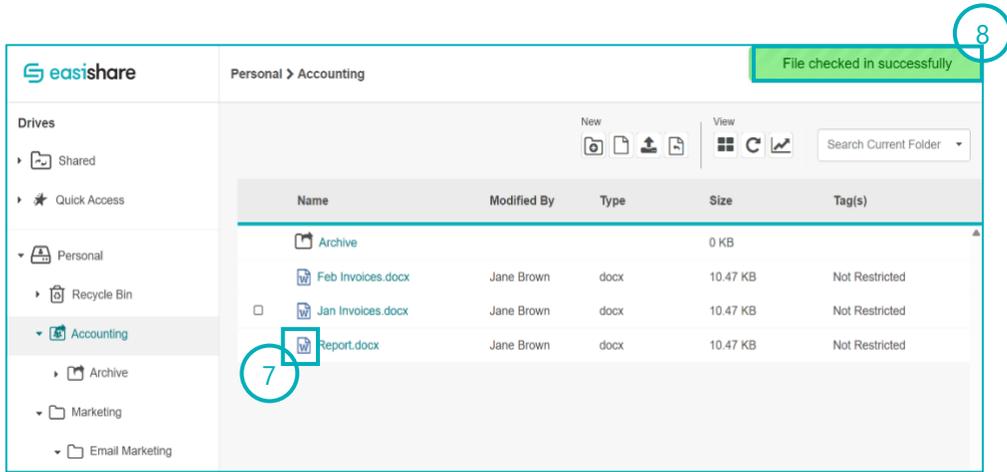
Check In

New Word Document.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.



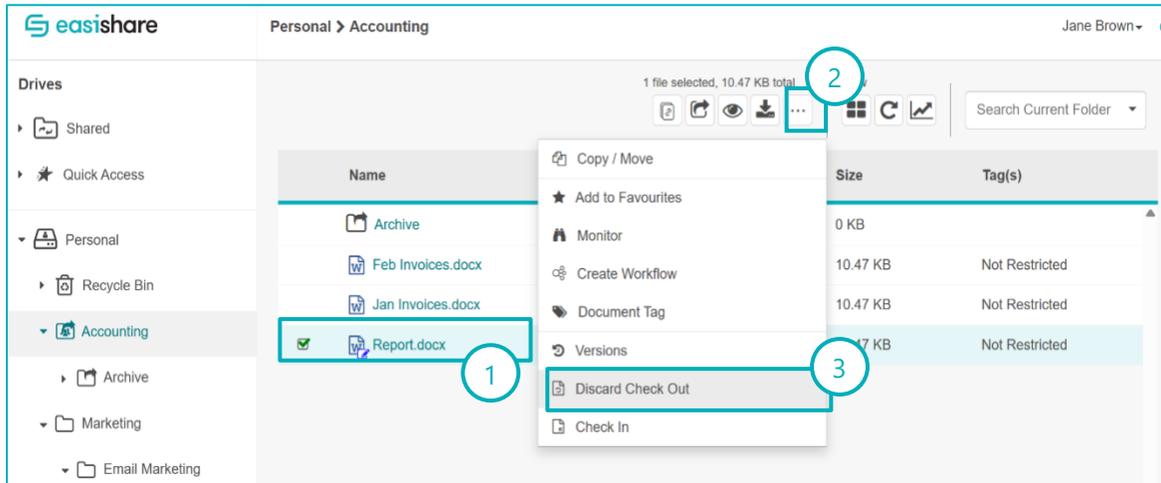
9. The version number that was created during check out will be recorded. This version is visible to all users.
10. After checking in, all actions are available to all users. Any users can choose to perform any file actions as per normal.

File Versions						
No.	Uploaded	Modified	Modified By	Size	Comments	
2	05/05/2025 5:3...	05/05/2025 10:...	Jane Brown	10.47 KB	checked in	
1	05/05/2025 10:...	05/05/2025 10:...	Jane Brown	10.47 KB		

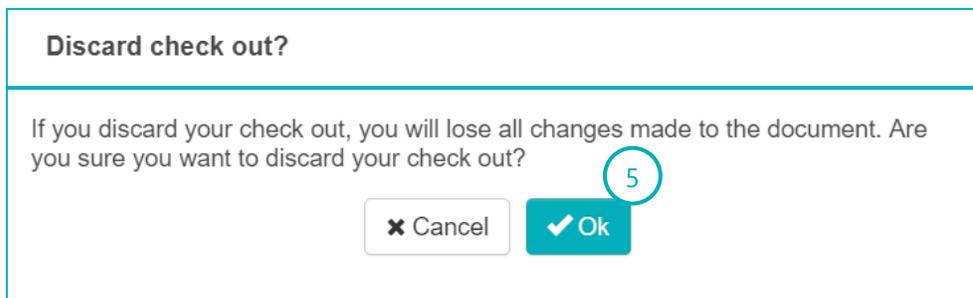
1-2 out of 2 items

9.3 Discard Check Out

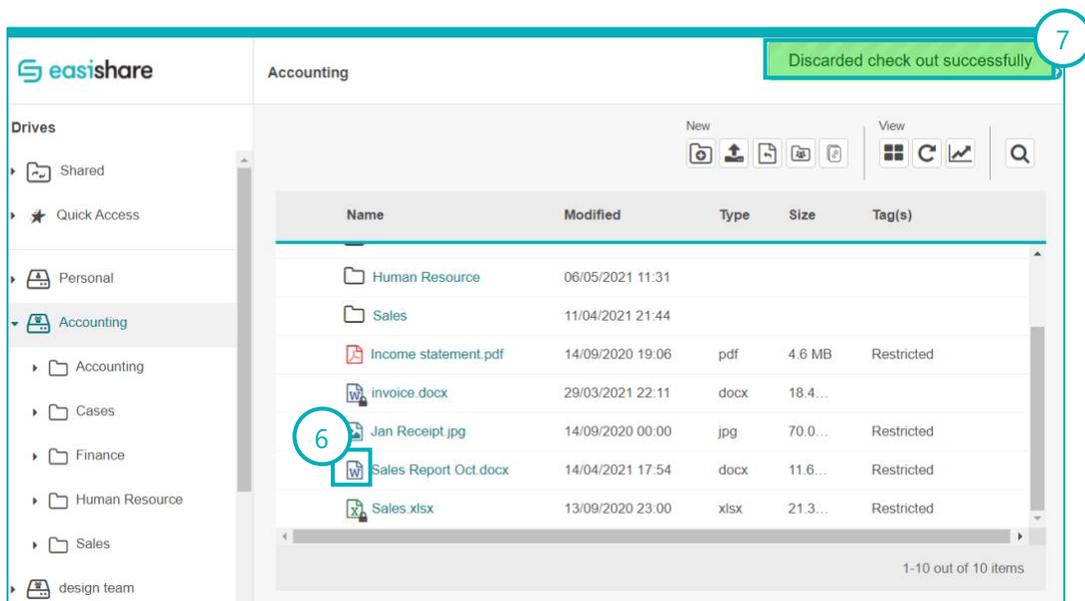
1. Select the file that was checked out.
2. Click on More
3. Click on Discard Check Out



4. A pop-up will appear for the user to confirm discarding the check-out.
5. Click Ok to proceed.



6. The Lock Icon no longer appears on the file.
7. A Discard Check Out message will appear.





- 8. The version number that was created during check out will be discarded. Refer to Section [Check Out a File](#) for more details on how the version number was generated.
- 9. Any users can choose to perform any file actions as per normal. All actions are available to all users.

No.	Uploaded	Modified	Modified By	Size	Comments
0.3	05/05/2025 5:4...	05/05/2025 10:...	Jane Brown	10.47 KB	
0.2	05/05/2025 5:4...	05/05/2025 10:...	Jane Brown	10.47 KB	
0.1	05/05/2025 10:...	05/05/2025 10:...	Jane Brown	10.47 KB	

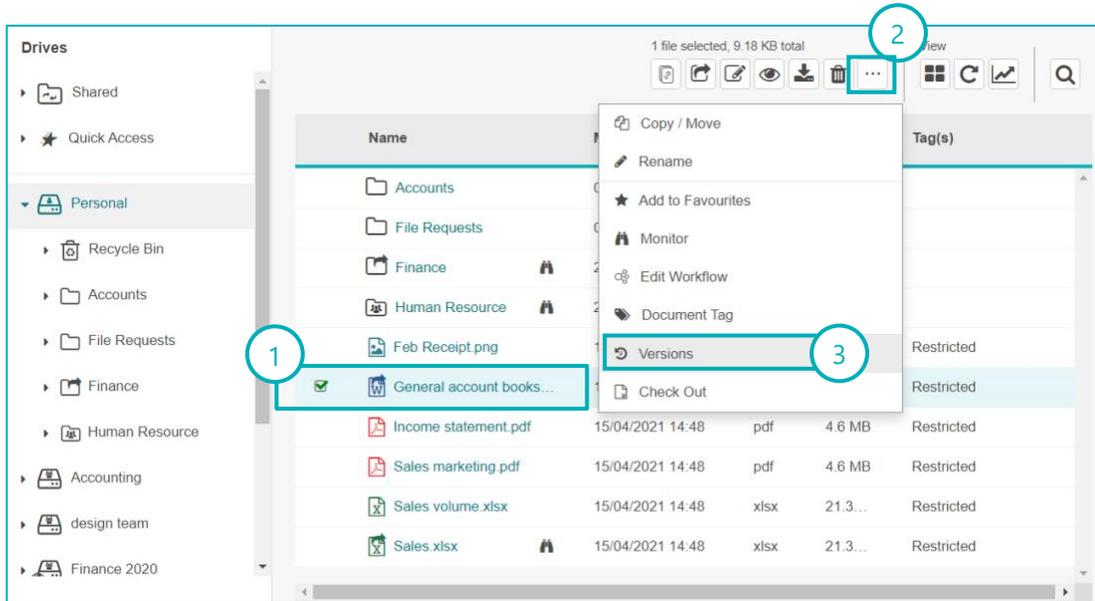
1-3 out of 3 items

8

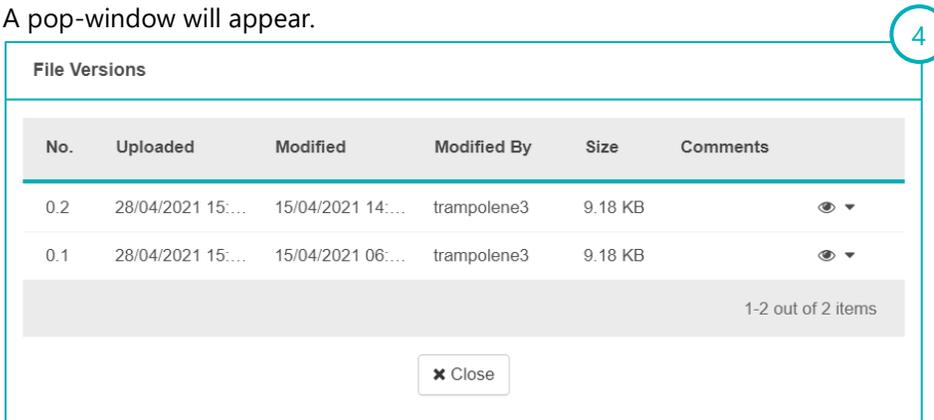
10 Versioning

10.1 View File Version

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

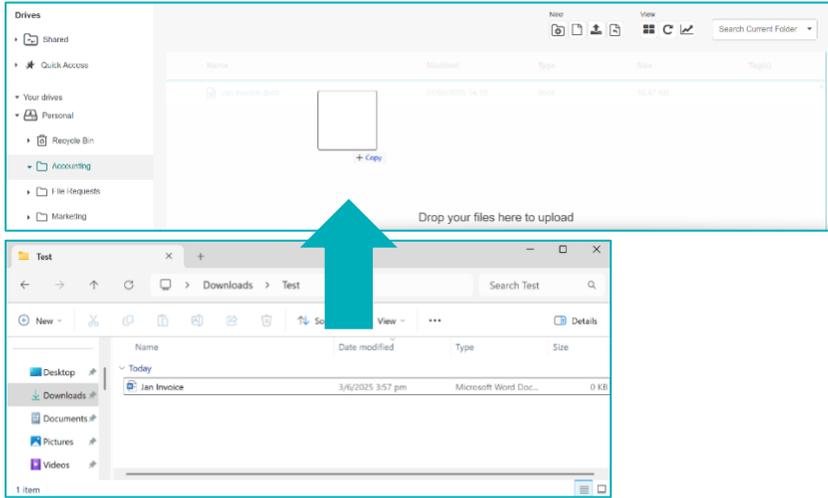


4. A pop-window will appear.

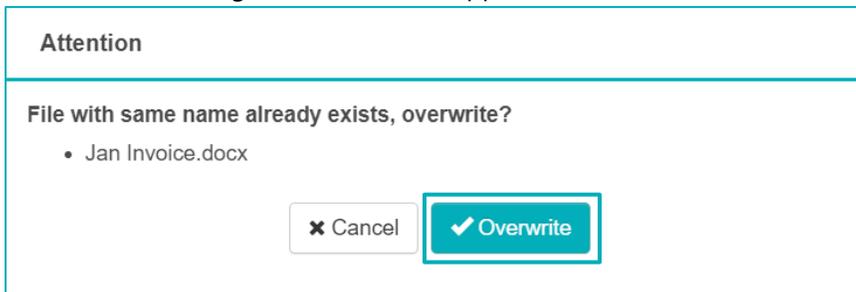


10.2 Create New Version

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

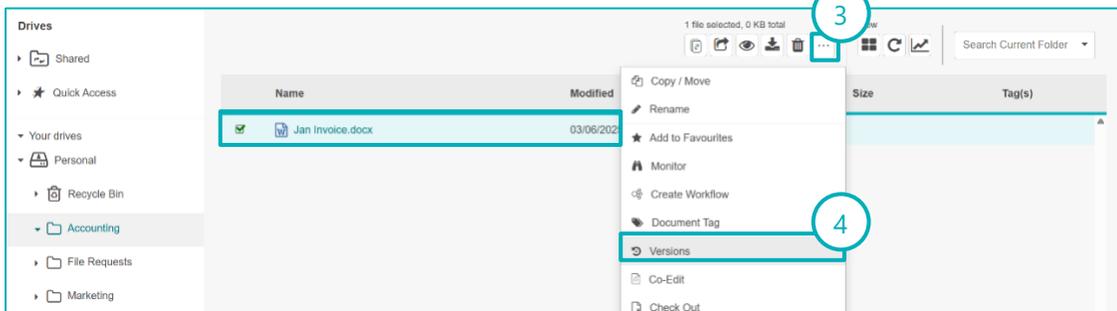


2. An overwrite message notification will appear and click Overwrite



3. Click More  located at the toolbar.

4. Click Versions 



5. A pop-up window will appear.



- The version number increased by 0.1.

File Versions						
No.	Uploaded	Modified	Modified By	Size	Comments	
0.2	03/06/2025 16:...	03/06/2025 15:...	Jane Brown	0 KB	👁️ ▼	
0.1	07/05/2025 14:...	07/05/2025 14:...	Jane Brown	10.47 KB	👁️ ▼	

1-2 out of 2 items

✕ Close

10.3 Restore Version

- Select the file you wish to restore.
- Click Versions 
- A pop-up window will appear.
- Click on the dropdown icon and select Restore  next to that version.

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	👁️ ▼	

📄 Download

🔄 Restore

✕ Close

11 Monitor

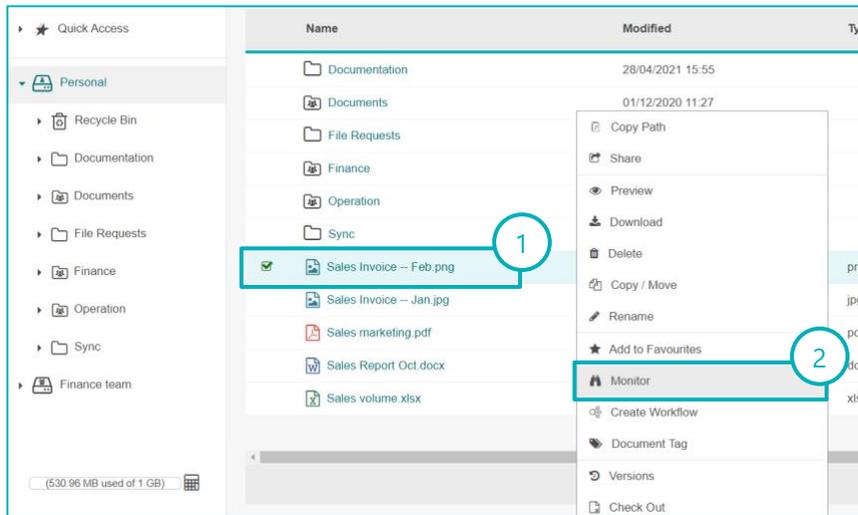
EasiShare’s Monitor feature allows all users to keep track of the changes made to the files such as modifications, deletions, and new uploads etc. You can get a notification via email whenever a file or folder is changed in your drive(s). You may see different options when you monitor a file or folder.

11.1 Monitor a File

- Select the file that you wish to monitor.



2. Click Monitor from the toolbar.



3. Select the options.

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

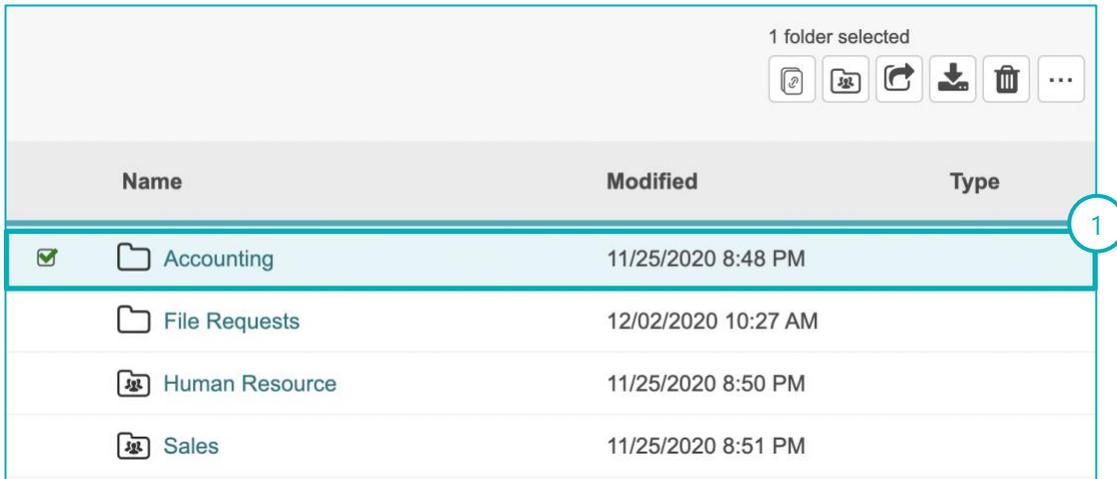
4. Once the file is successfully added to Monitor, you should see a Monitor icon beside the file name.

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

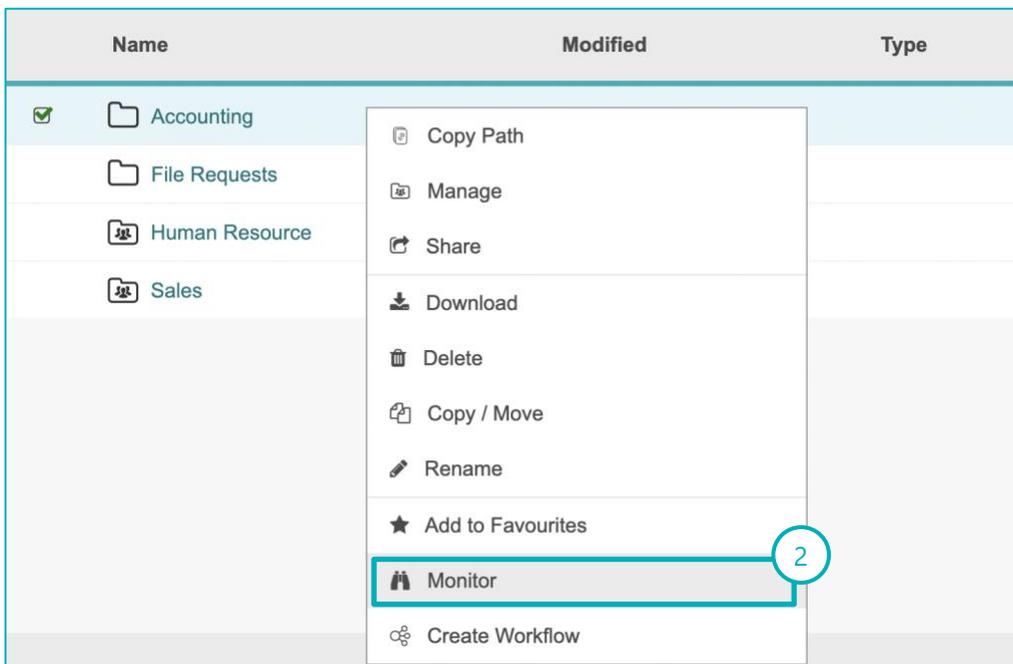


11.2 Monitor a Folder

1. Select the folder that you wish to monitor.



2. Select Monitor from the toolbar.



3. Select the options.



Monitor Accounting

Change

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

Frequency

Immediately ▼

When

Any changes ▼

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 or unshared
Changes > Managed Changed	When managed permissions are added, modified or removed Note: This selection only affects folders and the following 'When' Options do not apply: <ul style="list-style-type: none"> Any changes to document(s) created by me Someone else changes document(s) created by me Someone else changes document(s) last edited by me
Frequency	To control when you receive an email notification <ul style="list-style-type: none"> Immediately Daily (Default: 9AM) Weekly (Default: Monday)
When	Available selection: <ul style="list-style-type: none"> Any changes Someone else changes Any changes to document created by me

- | | |
|--|---|
| | <ul style="list-style-type: none"> • Someone else changes documents created by me • Someone else changes document last edited by me |
|--|---|

4. Click Monitor.

Monitor Accounting

Change

New Uploads

File Modified

File Deleted

File Unlocked

Share Changed

Manage Changed

Frequency

Immediately ▼

When

Any changes ▼

4

5. Once the folder is successfully added to Monitor, you should see a Monitor icon beside the folder name.

Name	Modified
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> <div>Accounting</div> </div>	<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> <div>11/25/2020 8:48 PM</div> </div>
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> <div>File Requests</div> </div>	12/02/2020 10:27 AM
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> <div>Human Resource</div> </div>	11/25/2020 8:50 PM
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"></div> <div>Sales</div> </div>	11/25/2020 8:51 PM

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

easishare

Monitoring

Drives

- ▶ Shared
- ▶ Quick Access
- ▶ Favourites
- ▶ History
- ▶ Monitoring 6

View [Grid] [Refresh] [Chart]

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



11.3 Stop Monitoring a File/Folder

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

Name	Modified
<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. Select Monitor from the toolbar.

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 Stop.

Monitor Accounting

Change

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

Frequency

Immediately

When

Any changes

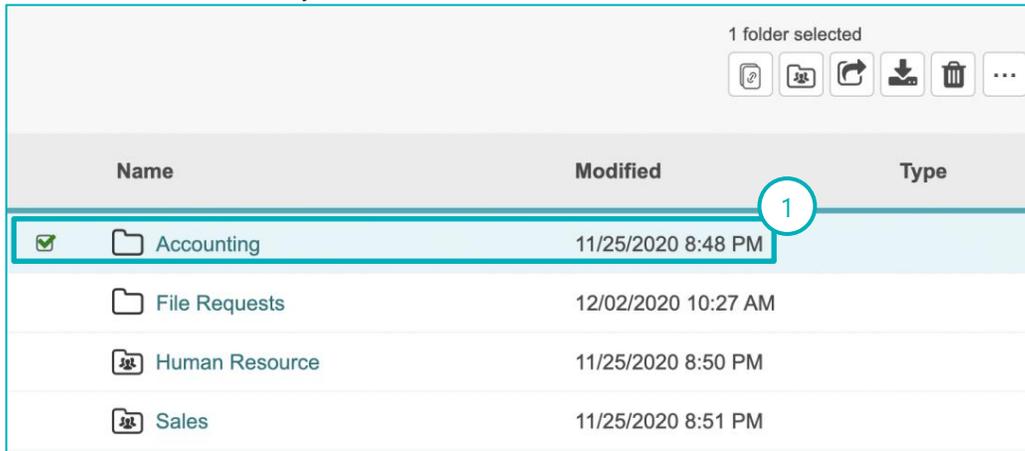


12 Workflow

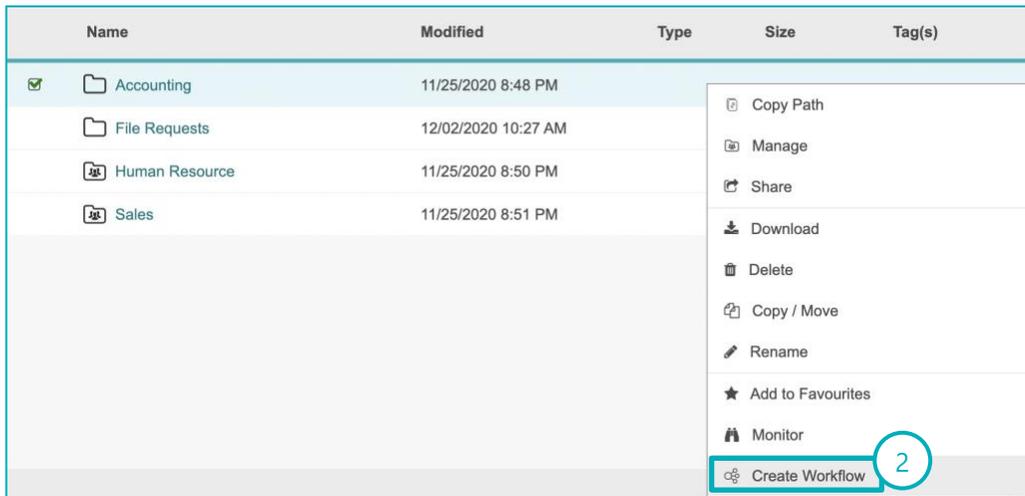
This section explains how to create a Share or Manage Folder approval workflow that requires agreement from all or any assigned approvers before the action is approved. A Share workflow requires approval to share a file or folder, while a Manage Folder workflow requires approval to move, copy, or perform administrative actions on folders. This feature helps enforce your organisation’s security and policy requirements.

12.1 Owner Creates Workflow

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



2. Select Create Workflow  from the toolbar.





3. Select workflow type, then click Proceed

The screenshot shows a dialog box titled "Workflow". Inside, there is a section "Select workflow type:" with two radio button options: "Share" (which is selected) and "Manage Folder". At the bottom of the dialog, there are two buttons: "Cancel" and "Proceed".

4. Select the approver(s).
5. Select ALL must approve or ANYONE can approve.
6. Click Apply.

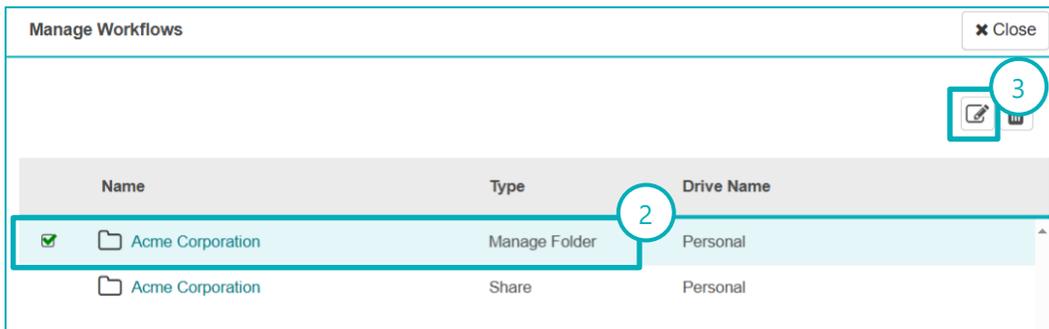
The screenshot shows a "Share Approval Workflow" dialog box. At the top, it says "Select user or group who can approve sharing of this file(s)". Below this is a table with a header "Name" and two rows: "Jane Brown" and "John Smith", each with a checked checkbox. Below the table is an "Options" section with a "Share when" label and two radio button options: "ALL must approve" (selected) and "ANYONE can approve". At the bottom, there are "Close" and "Apply" buttons. Numbered callouts are present: a circle with "4" points to the user selection table, a circle with "5" points to the "Share when" options, and a circle with "6" points to the "Apply" button.

12.2 Owner Edits Workflow

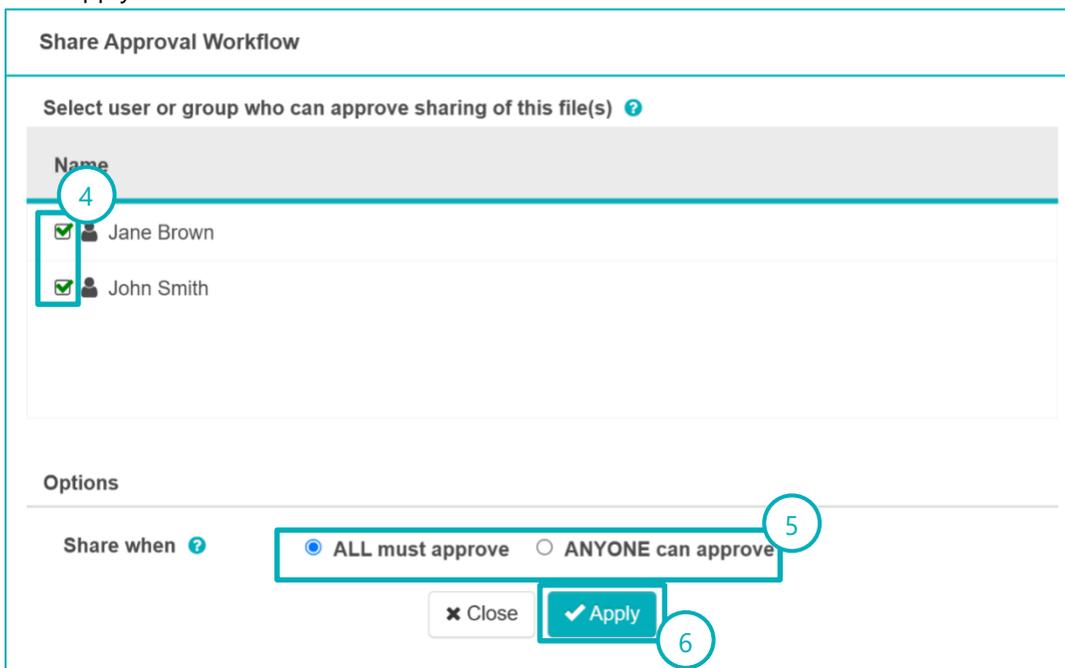
1. Select Manage Workflows  from the user profile dropdown list.



2. Select the file/folder that you wish to edit a workflow.
3. Click Edit



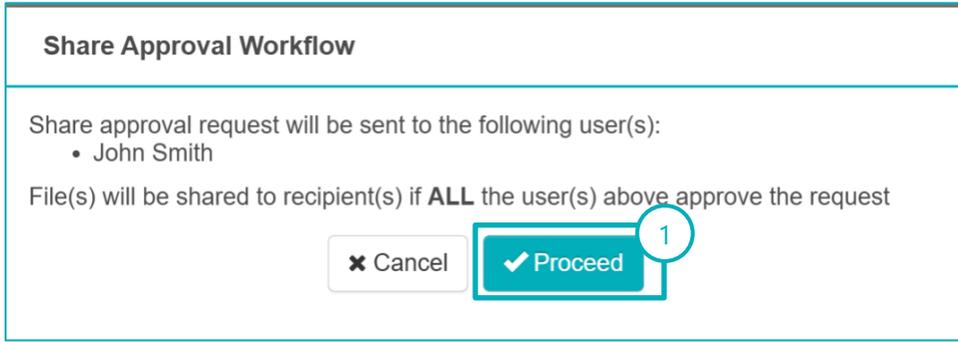
4. Select the approver(s).
5. Select All must approve or ANYONE can approve.
6. Click Apply.



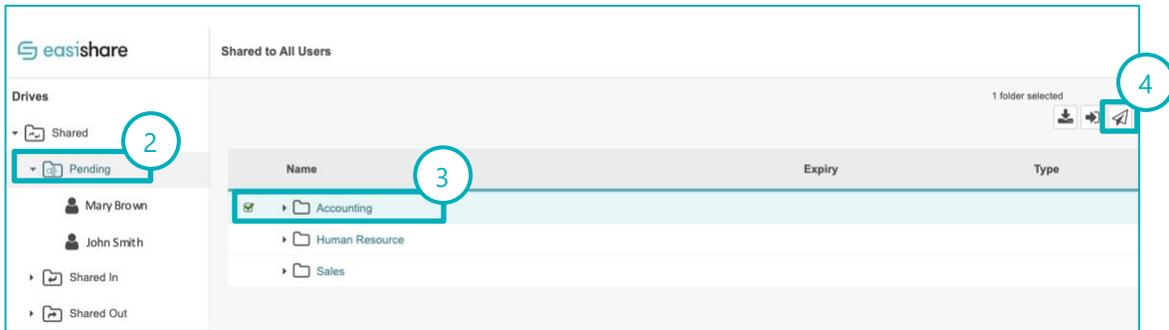
12.3 User Checks Pending Approvals and Remind Approvers

1. User shares a file/folder as per Section [Share](#).

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

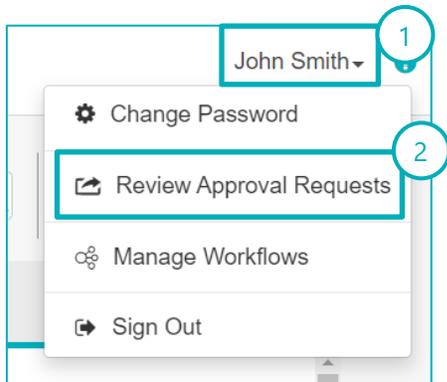


2. To check on requests pending for approval, click on Shared > Pending.
3. To send a reminder, select a pending request.
4. Click Send Reminder in the toolbar.



12.4 Approvers Approve or Reject with Comments

1. To review a Share Request, navigate to Review Share Request by clicking on dropdown button beside your username.



2. Click on Review Approval Requests.
3. Select Approve or Reject.



Name	Workflow Type	Drive	Shared By	Initiated On	Link Expires	Action
Accounting	Share	Accounting	Jane Brown	05/05/2025 ...	No Expiry	Reject Approve

1-1 out of 1 items

- 4. If Reject is selected, enter a reason for the rejection to inform the user (optional).
- 5. Click Ok.

Reject Approval Request

Comments

Your comment will be sent to Jane Brown

✕ Cancel ✓ Ok