EasiShare Web Portal User Guide

Version 15.2

(For EasiShare User)

easishare
by inspiretech

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1 Introduction

1.1 Introduction to EasiShare

EasiShare is an Enterprise File Security platform that allows user to share and collaborate 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

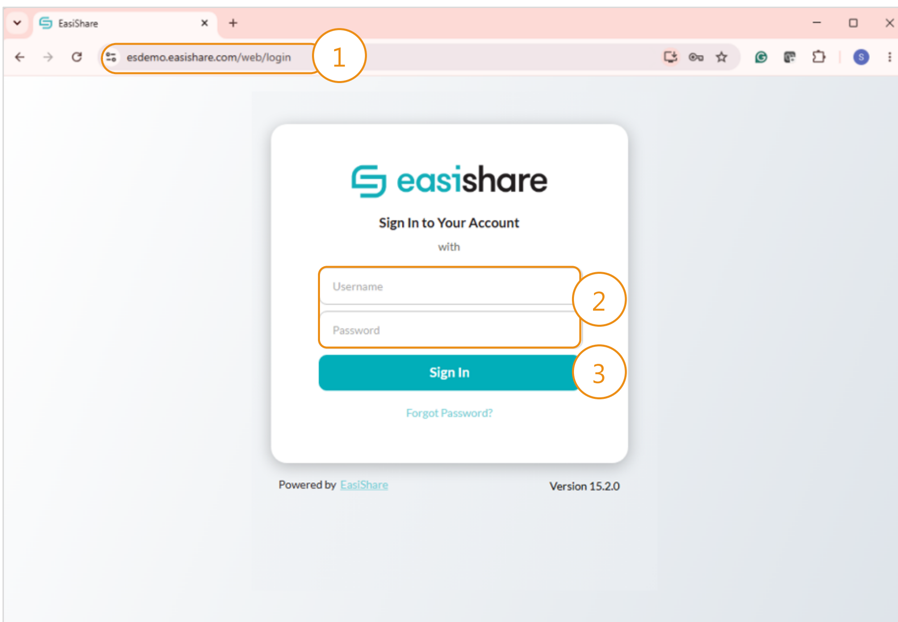
The EasiShare Web Portal allows users of EasiShare to manage storage, file, and create upload requests in a web portal. Users will be able to create new folder, upload file, download file, modify existing file, create an upload request and more. While EasiShare supports multiple access platforms like Desktop and Mobile, this User Guide focuses on the functions that can be performed via the Web Portal.

2 Login and General Navigation

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 **Sign In**.

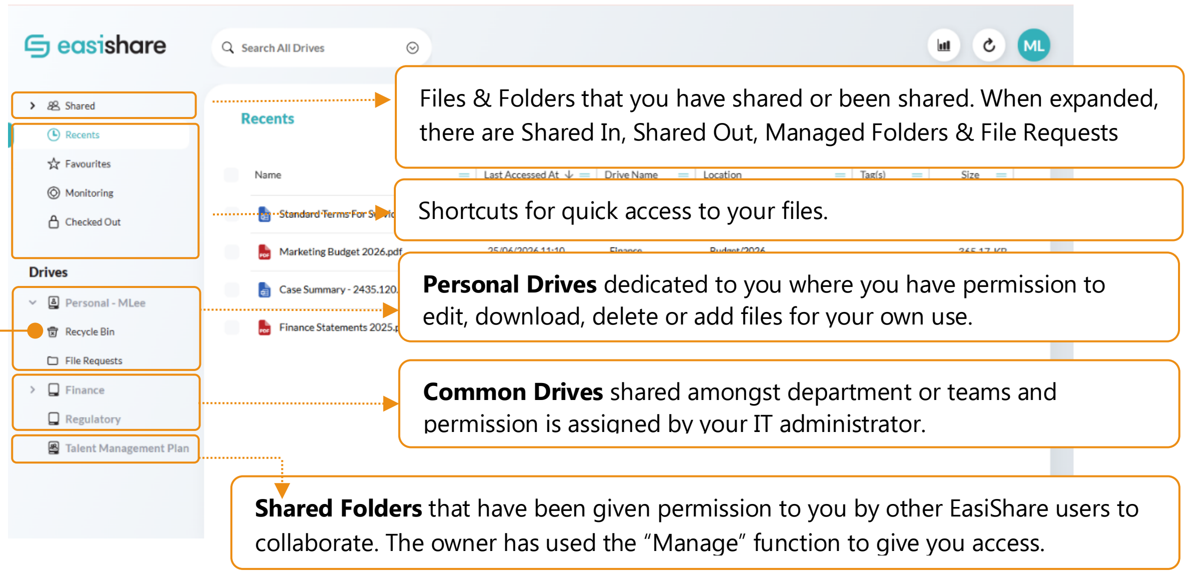


Login Errors:

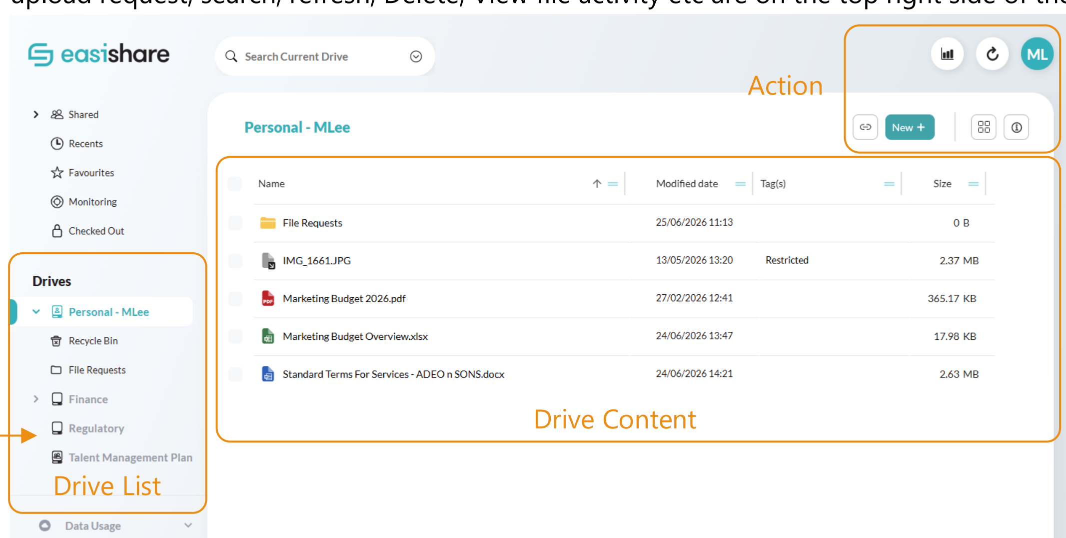
If you encounter error message	What should you do?
Invalid username or password!	Either the Username entered does not exist or your password is incorrect. Check that you have entered correctly.
User account is disabled.	Your account has been disabled. Check with your Administrator
Your account has been locked. Please contact your system administrator.	Your account is locked. Check with your Administrator.
Please change your password before proceeding.	You must change your password before login.

2.2 Accessing EasiShare

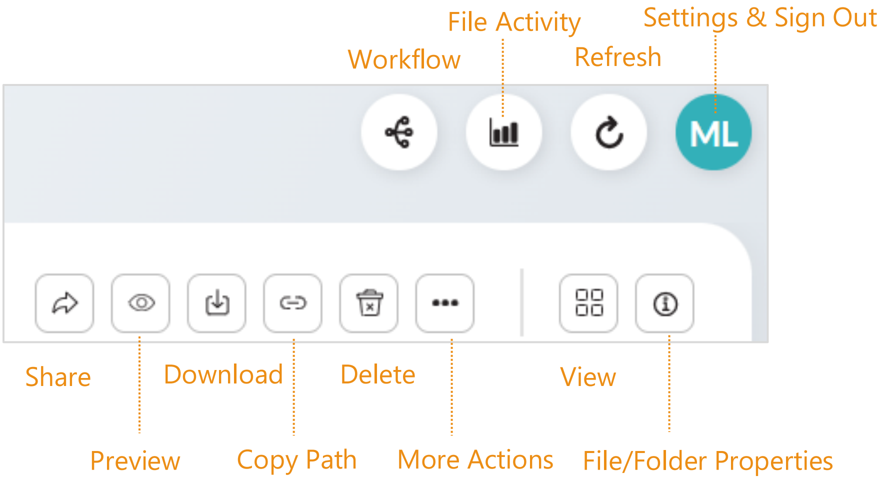
1. Page will be directed as shown below after logging in. You should see drive(s) that you can access.



2. On this page’s left panel, User is able to view all the drive(s) assigned. Action buttons like create, upload request, search, refresh, Delete, View file activity etc are on the top right side of the screen.



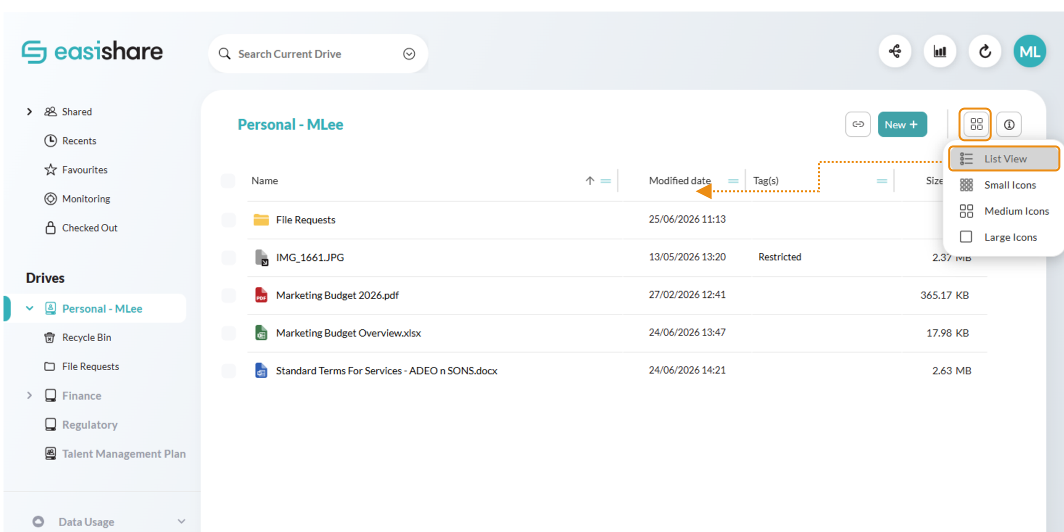
3. More Action tools are located at the top right corner.



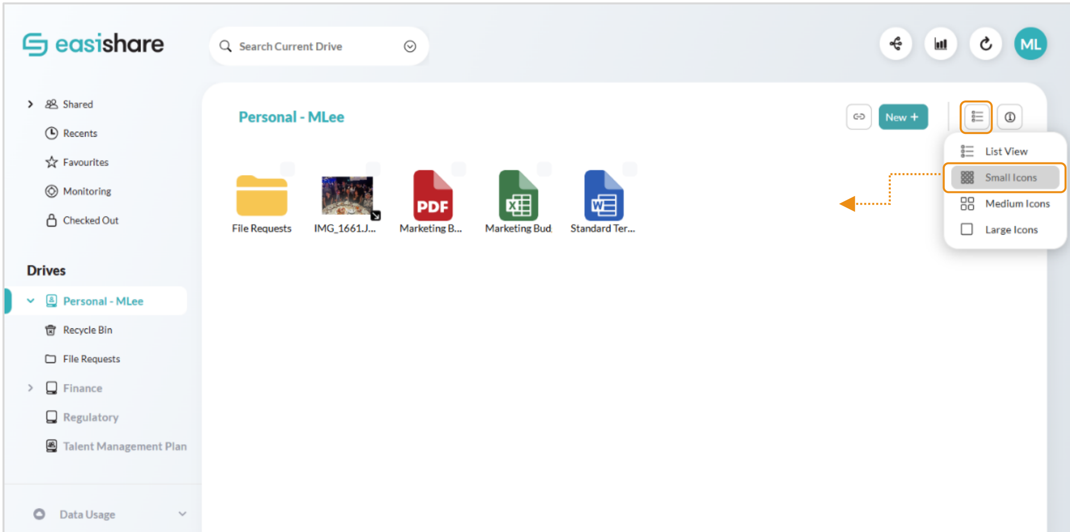
For further customising experience in using EasiShare, go to Customising User Experience (section).

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 top to bottom, **small**, **medium** and **large** icons views.
3. User will be able to sort according to their preference with the help of sorting menu.

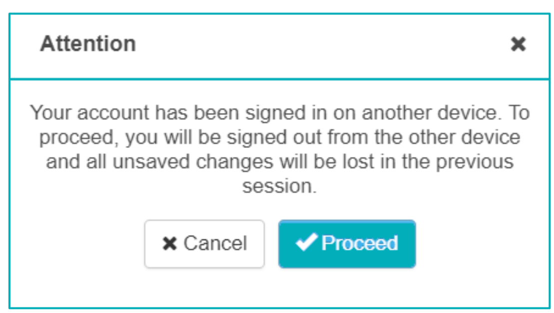


(In Grid mode, where the grids can be chosen from smallest to largest)



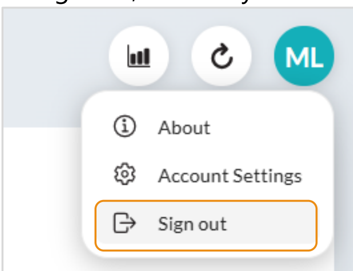
2.4 Concurrent Login

If the administrator has

Scenario	**Enabled** concurrent login	**Disabled** concurrent login
Outcome	the user would be able to login to multiple devices using the same user account.	the user would only be able to access your user account in **<u>one</u>** device at a time. If the user tries to login via another device, the system will display below message to sign out from **previous devices** before **proceeding to login** in the **current device.**  The same user account would be **automatically** signed out from other devices.

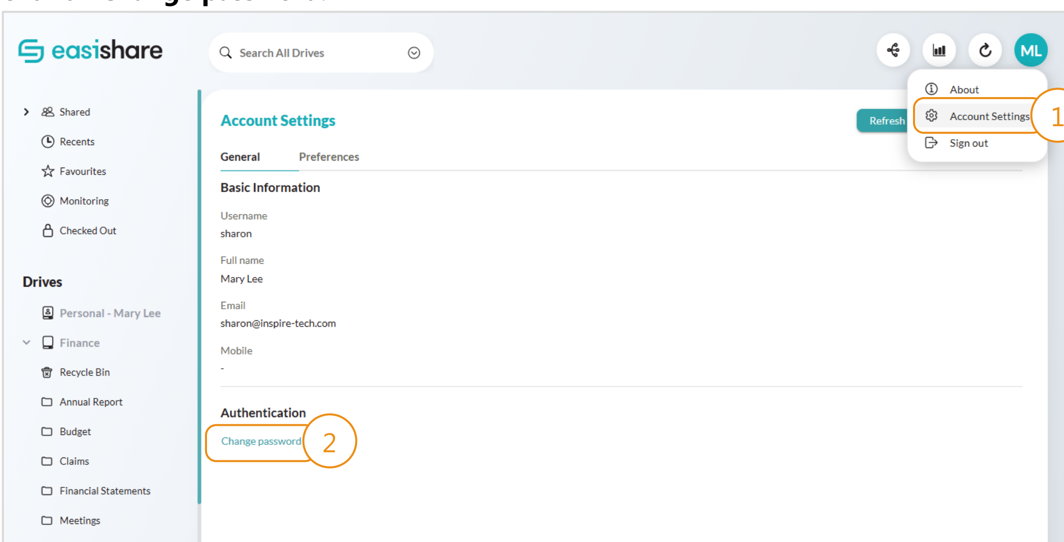
2.5 Logout

To sign out, click on your name and select Sign out.

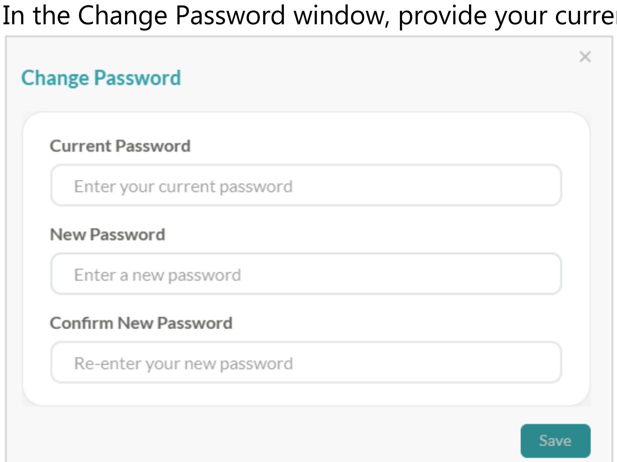


2.6 Password Management

1. To change password, click on the Username and select **Account Settings**.
2. Click on **Change password**.



3. In the Change Password window, provide your current and new password then click Save.



Note: For EntraID users, you do not need to update your password in EasiShare.

3 Common Folder & File Operations

The are common actions one may perform with the system (subject to the functionality being enabled by the administrator and the permissions one have on the Drive).

	Folder	**File**
Create	Create Folder	Create File / Upload File
Preview & Edit	-	Preview File & Online Edit where applicable
Rename	Rename Folder	Rename File
Copy/Move	Copy/Move Folder	Copy/Move File
Download	Download Folder	Download File
Delete	Delete Folder	Delete File
Versions & File Locking	-	Review & Restore File Versions, Check in/Check Out for better control while editing
Restore	Restore Folder from Recycle Bin	Restore File from Recycle Bin
Document Tag	-	Tag File classification
Monitor	Monitor Folder changes by other users (Add/Delete/Modify)	Monitor File Changes by other users (Add/Delete/Modify)
Share	Share folders with external parties via link & revoke the share.	Share files with external parties via link & revoke the share
	*More security features can be applied to ensure the share process is time-based & secure *Workflow may apply	
File Request	-	Request Files from external parties via Link
Collaborate “Manage”	Manage the permissions to allow others to view or collaborate	-

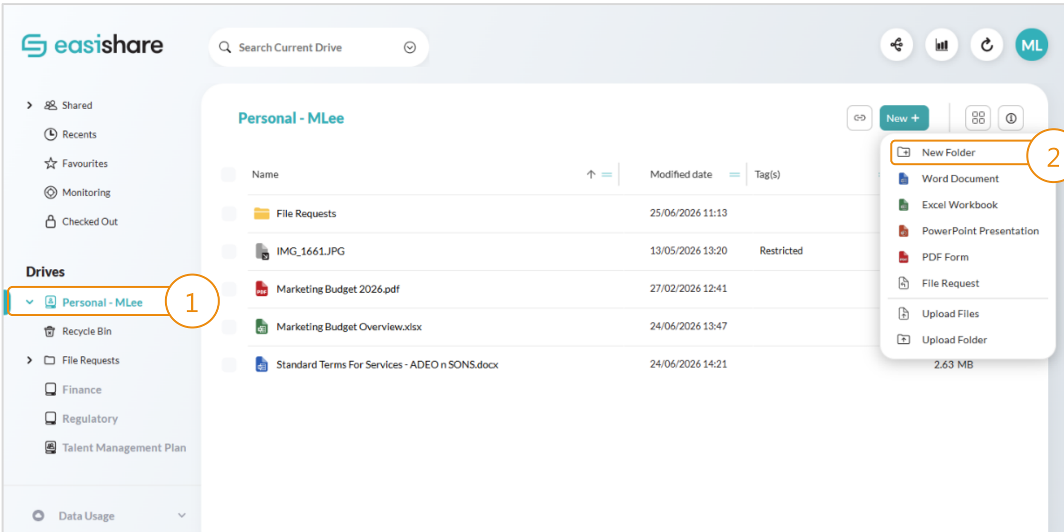
4 Folder Operations

4.1 Create a New Folder

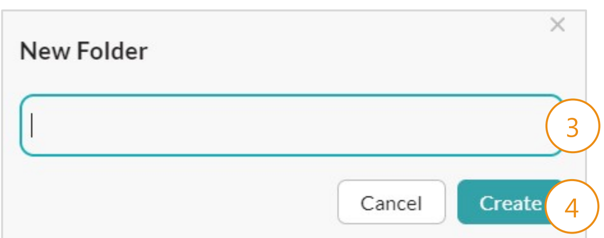
1. Click on a Drive located in the **Drive List** along the left panel to navigate to the new folder's location.

2. Click on 

then select **New Folder**  .

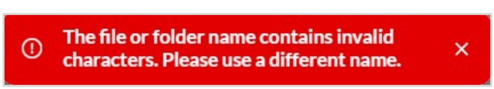


3. Enter **folder name** in the input box.
4. Click **Create.**



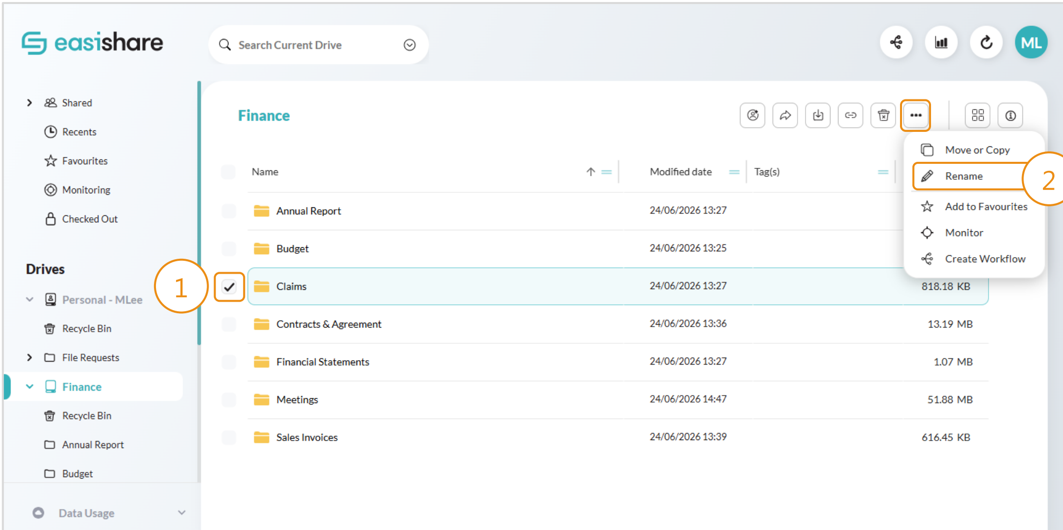
Note:

This error may pop-up if the folder name is invalid

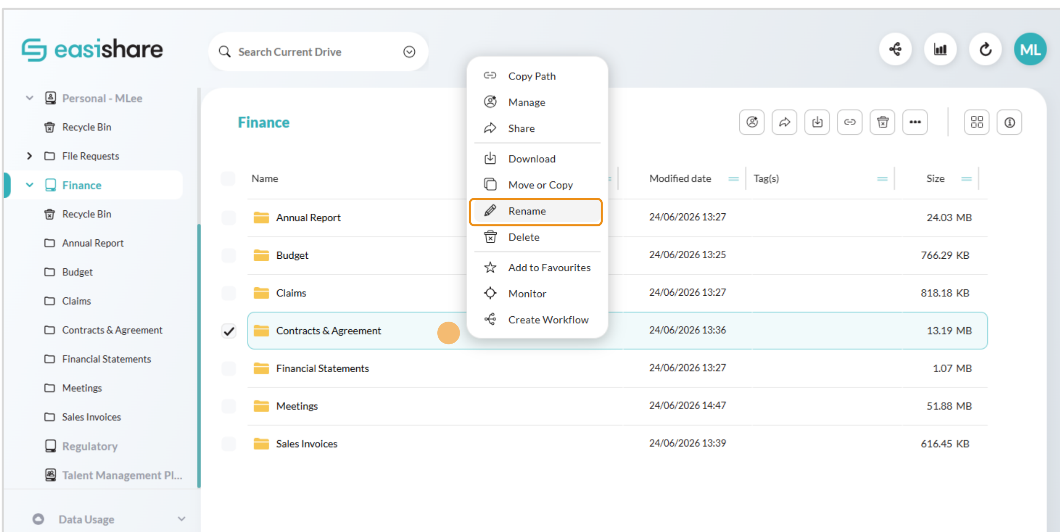


4.2 Rename a Folder

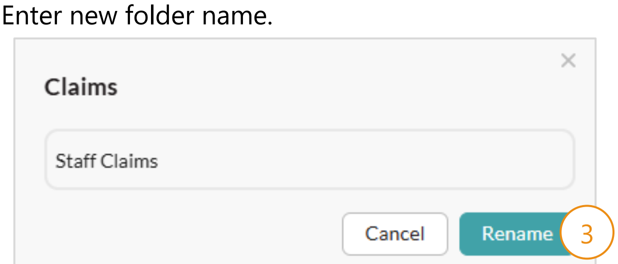
1. Select the folder by clicking on the checkbox beside the folder name.
2. Click on **More** ••• then select **Rename**.



*Alternatively, you can **right-click** on any part of the row of the folder and select **Rename** from the menu.



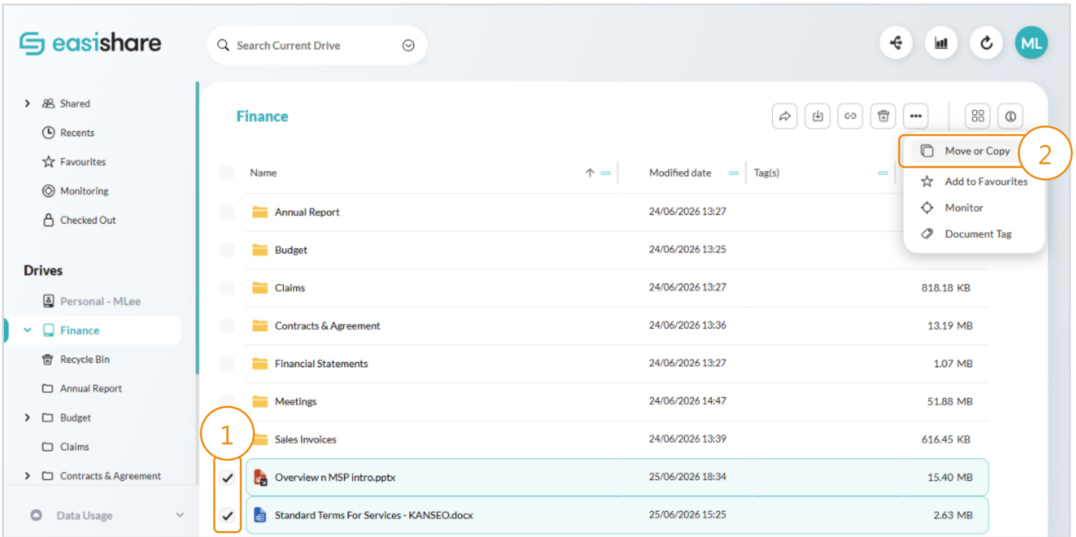
3. Enter new folder name.



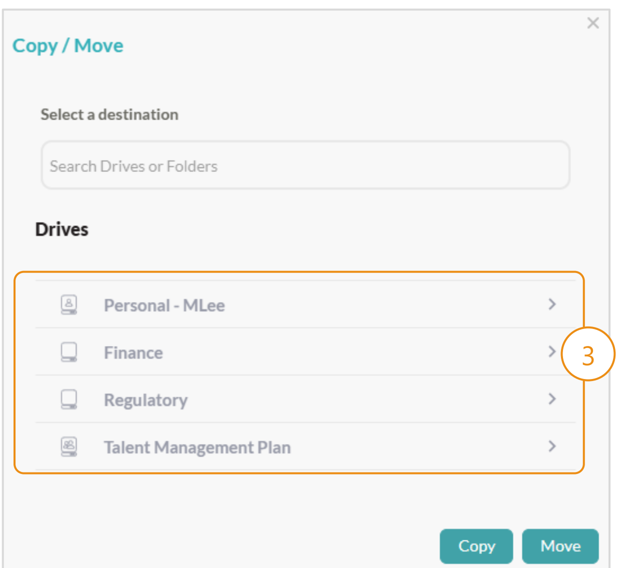
5 File Operations

5.1 Copy/Move

1. Select the file/folder(s) by clicking on the checkbox beside the file/folder name(s). You may select multiple file/folder(s) at a time.
2. Click on **More** ••• icon then select on **Move/Copy** .

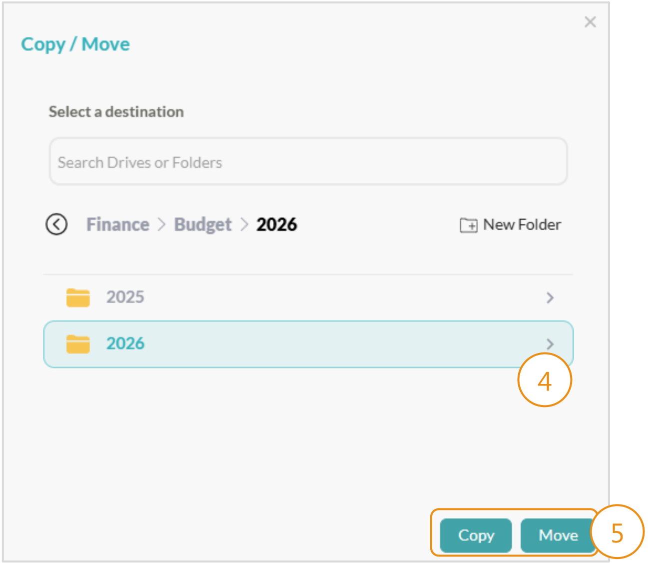


3. Select a drive in the **Drives** section.



4. Select the folder you wish to move/copy in the **Select Folder List**.

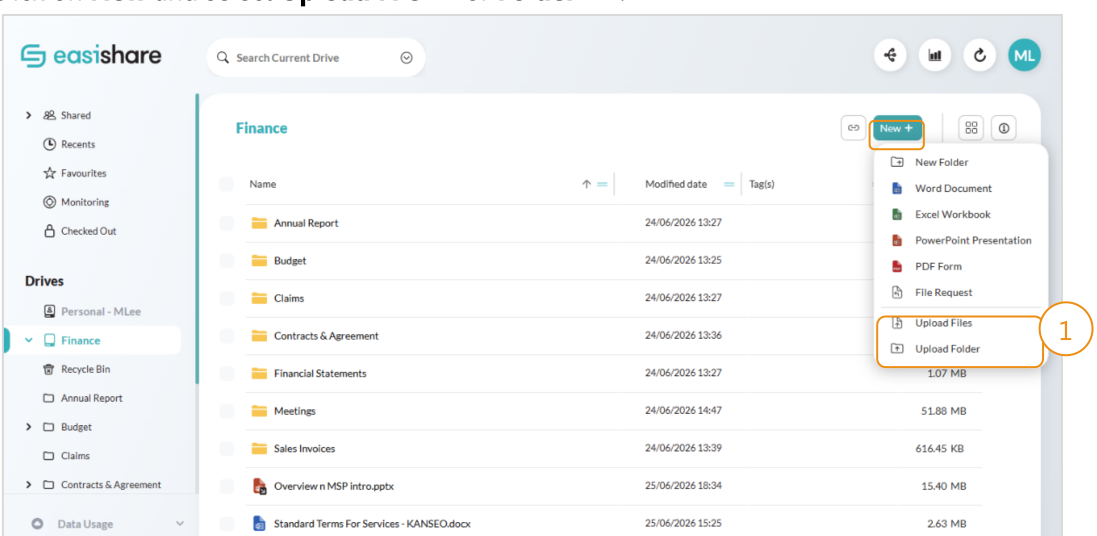
5. Click on **Move/Copy** button located at the bottom.



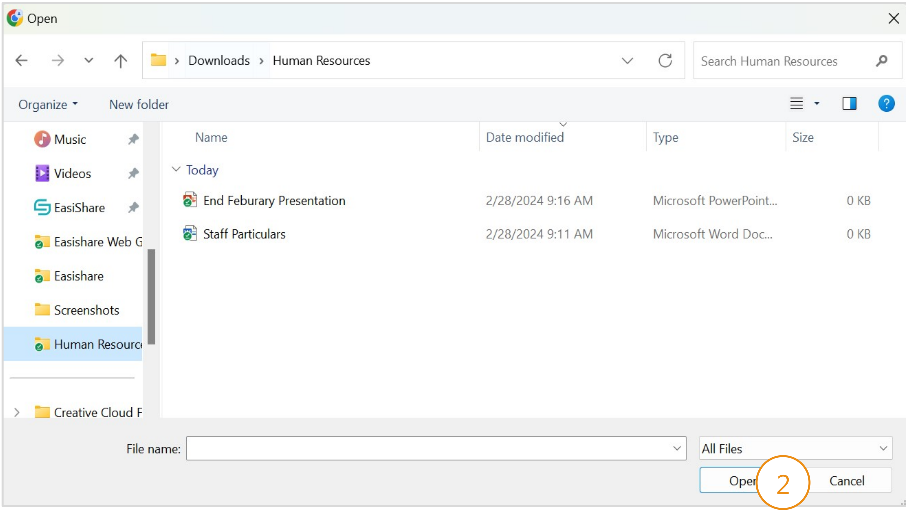
Note: Moving a file/folder that is shared may cause the link to break. Recipients may not be able to access such files/folders.

5.2 Upload Files

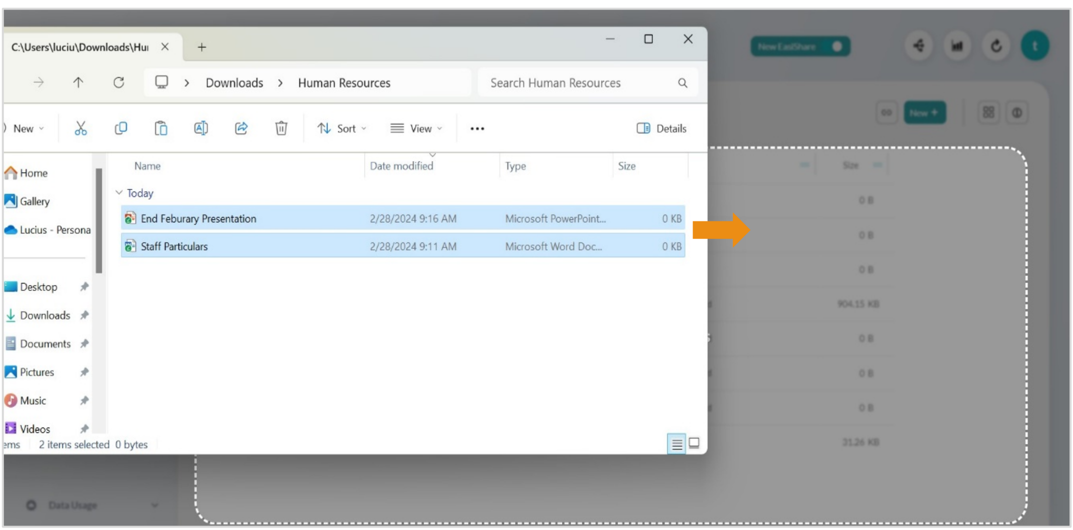
1. Click on **New** and select **Upload File** or **Folder** .



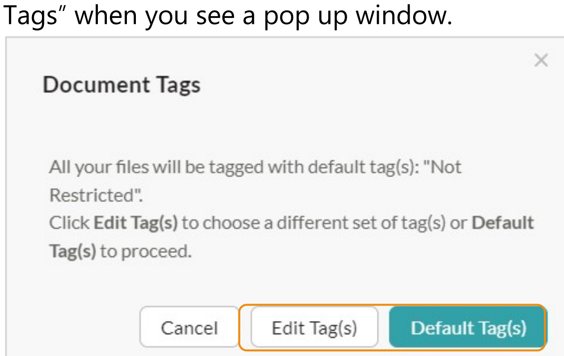
2. A file navigation window will appear. **Select** the file/folder(s) you wish to upload. You may select multiple file/folder(s) at a time.



3. Alternatively, **drag and drop** file/folder(s) from your desktop or file explorer. You may select multiple file(s) at a time.

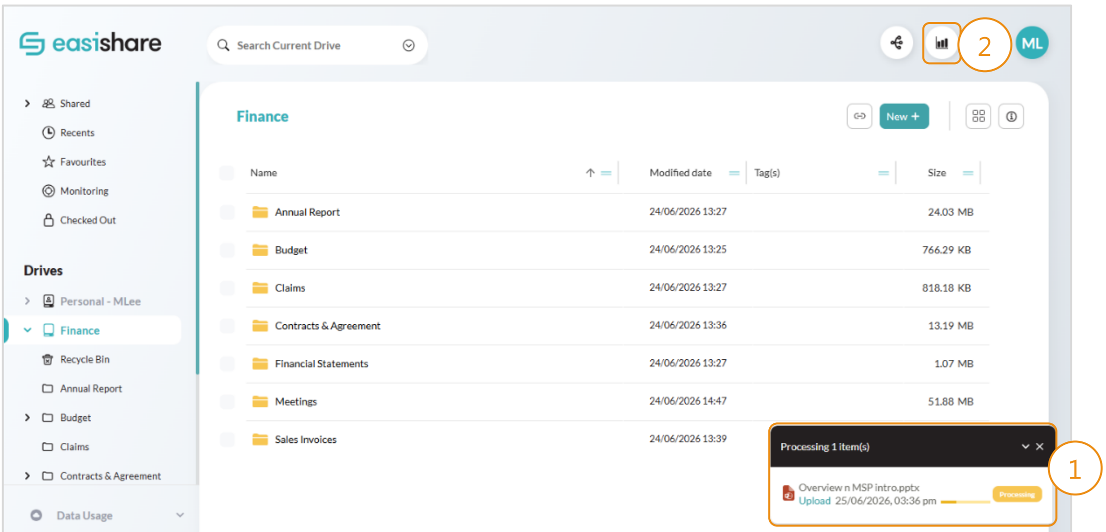


Note: If Document Tagging is turned on for your organisation, you need to select "Edit Tag(s)" or "Default Tags" when you see a pop up window.

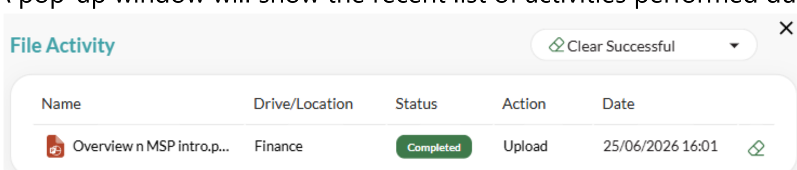


5.2.1 Check Upload Status

1. A progress window will display at the bottom right indicating “Processing X Item(s)”. (X can be any number). Once it is completed, the status will turn green.
2. Alternatively, you can click on **File Activity** icon located at the top right of the application.



3. A pop-up window will show the recent list of activities performed during the current active session.



5.2.2 Uploading a Virus File

Note:

This scenario only applies if customer has implemented **Virus scanning integration** in EasiShare. Otherwise you may ignore this scenario.

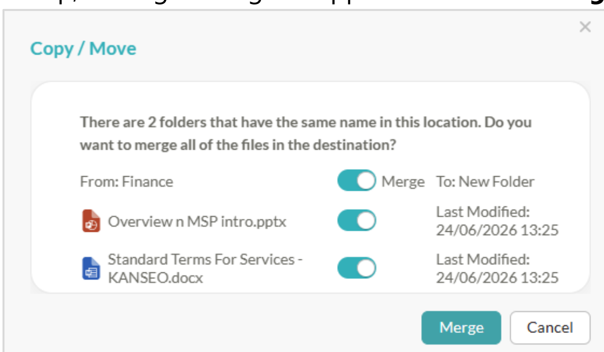
When the User accidentally uploads a virus file, the following will occur.

1. The message “Your file is currently being uploaded. Check the File Activity.”
2. In the Progress Window, it will display the processing status.

3. Upon detecting a virus, an error message will also be displayed at the top.

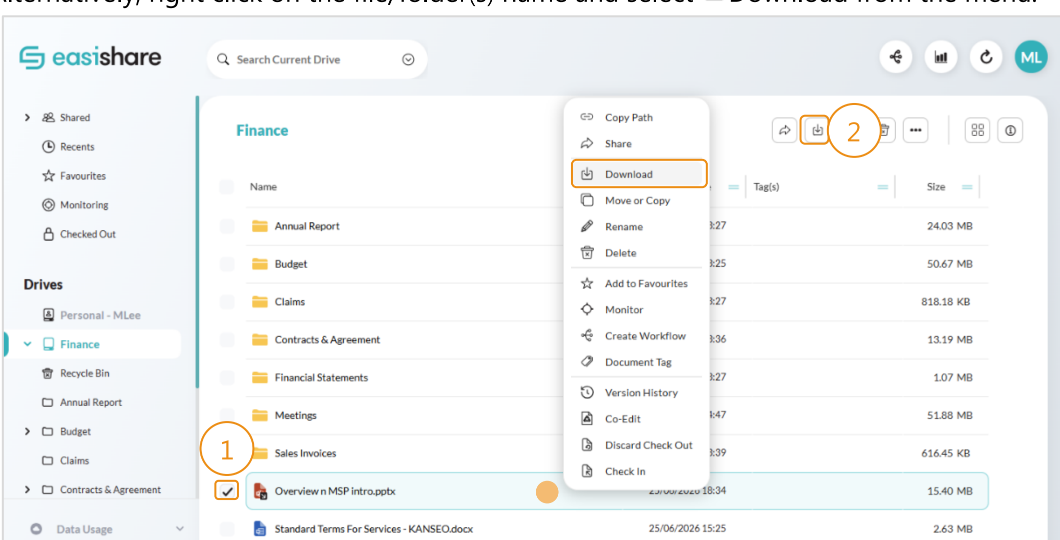
5.2.3 Overwriting Duplicate Files

If user were to Copy/Move an existing document in the destination folder with a different date/time stamp, a merge dialog will appear. Choose to **Merge** or "override" the copy in the destination folder.



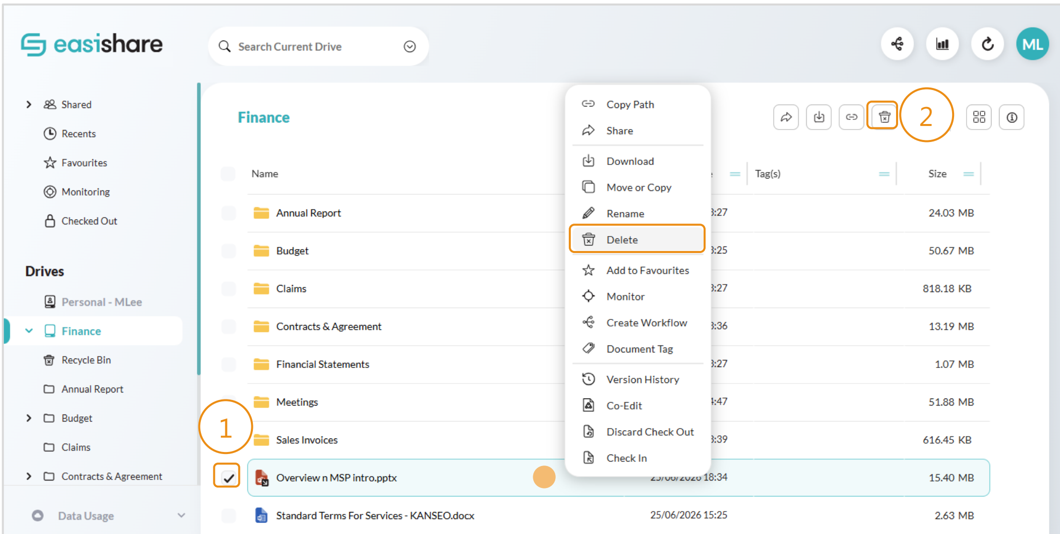
5.3 Download

1. Select the file/folder(s) by clicking on the checkbox beside the file/folder name(s). You may select multiple file/folder(s) at a time.
2. Click on **Download** icon.
3. Alternatively, right click on the file/folder(s) name and select Download from the menu.



5.4 Delete

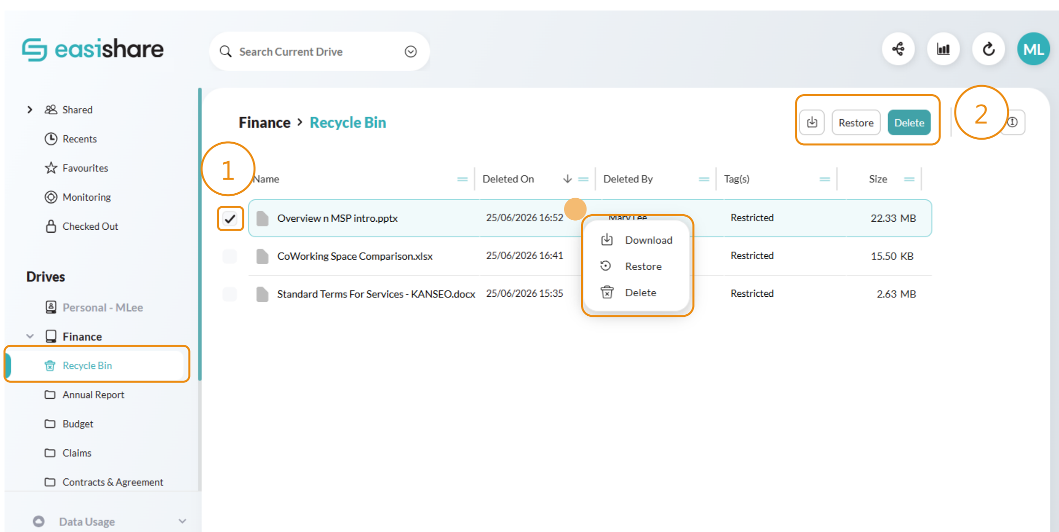
1. Select the file/folder(s) by clicking on the checkbox beside the file/folder name(s). You may select multiple file/folder(s) at a time.
2. Click on **Delete** .
3. Alternatively, right click on the file/folder(s) name and select **Delete** from the menu.



5.5 Recycle Bin

When you go the **Recycle Bin** icon of a drive and select file(s)/folder(s), you can perform any of these actions:

	Restore	Download	Permanently Delete*
Intention	To restore file/folder into its original location.	To download a copy to Local Drive/PC.	To permanently delete and restore storage space.
Steps	1. Select the checkbox next to the file name. 2. Click the **Restore** button. 3. The file(s)/folder(s) will be restored in the original location.	1. Select the checkbox next to the file name. 2. Click the **Download** icon. 3. The file will be downloaded, and a pop-up will appear at the top right of the browser.	1. To permanently delete a file/folder, select the checkbox next to the file name 2. Click the **Delete** button. 3. A confirmation window will be displayed and upon selecting **Okay**, the permanent deletion will occur.
	Alternatively, right-click on the file name and select **Restore** from the menu.	Alternatively, right-click on the file name and select **Download** from the menu.	Alternatively, right-click on the file name and select **Delete** from the menu.



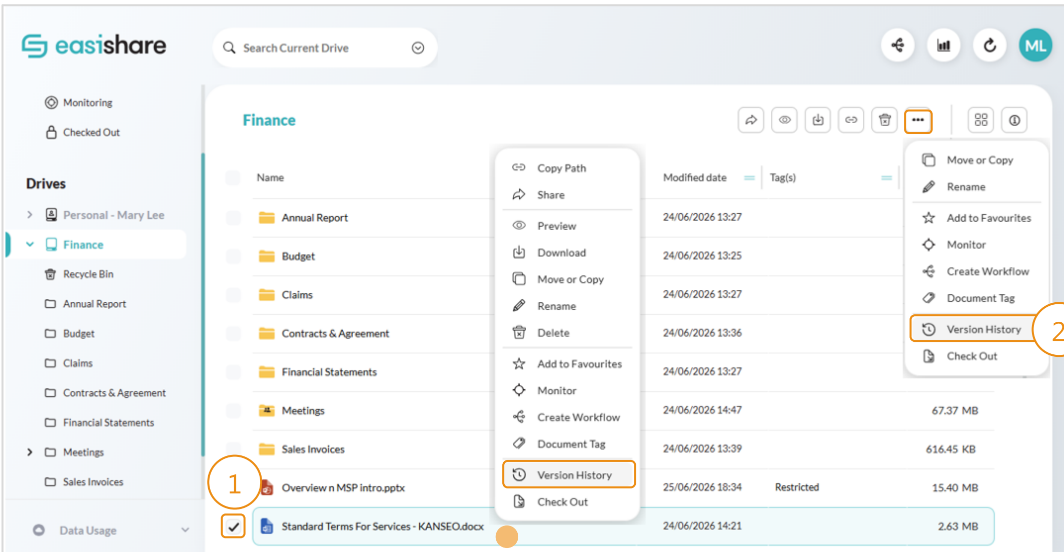
***Note:** A copy will be reserved in the Admin's Recycle Bin if your organisation has Admin Recycle Bin feature turned on by the Administrator.

5.6 Version History

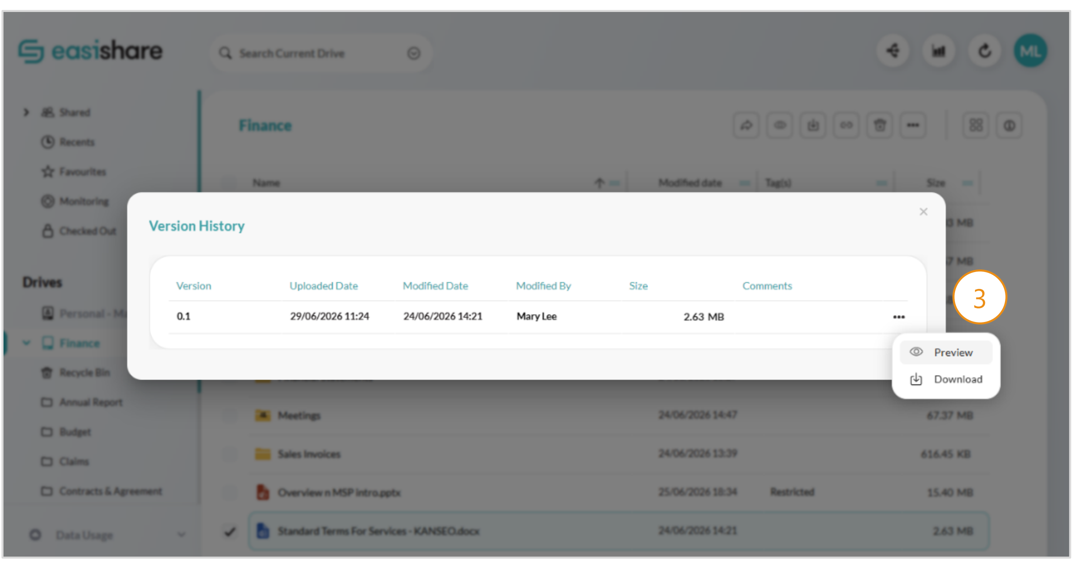
5.6.1 View File Version

1. Select the file by clicking on the checkbox beside the file name.

2. Click on the **More** ••• icon then select **Version History**.

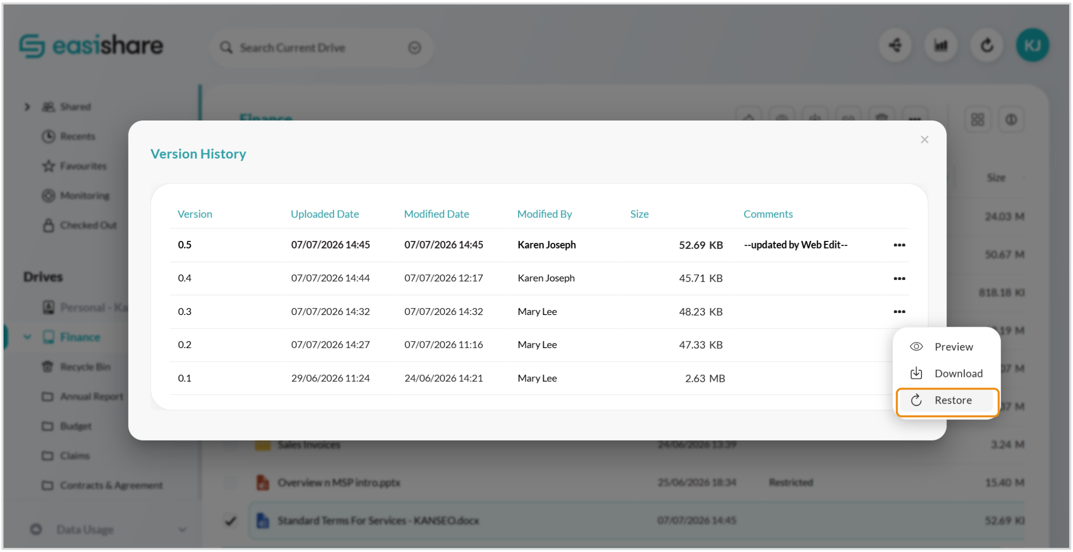


3. You may view the version history in the pop-up window and select the options to **Preview** or **Download** the file.



5.6.2 Restore Version

At the View Version History pop-up window, click on **More** icon and select **Restore** along the respective version you wish to restore to.



5.7 Versions Control

5.7.1 Understanding Check in/Out

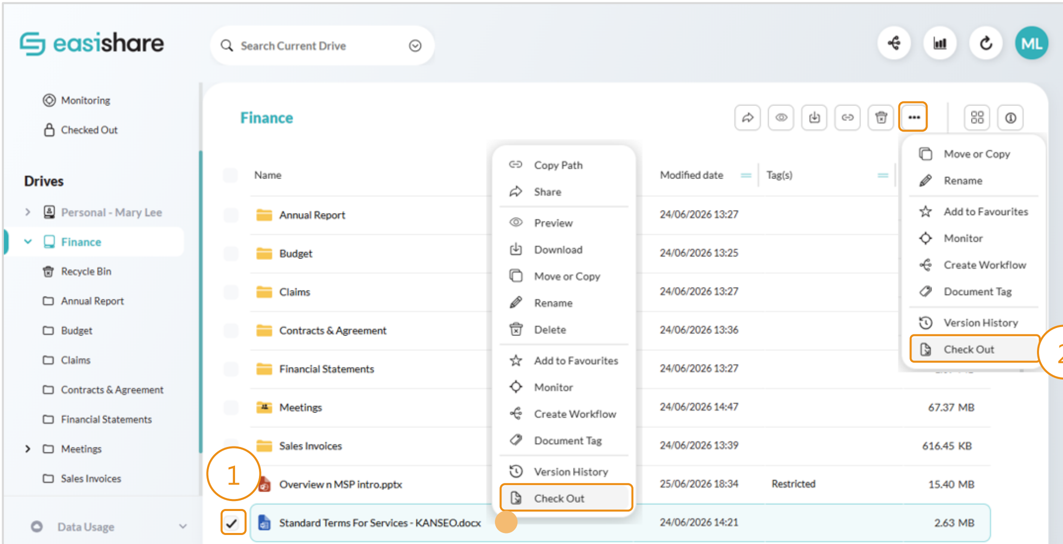
When working in a shared environment (like **Common Drives** or **Shared Folders**), **overwriting** files can create challenges among users. To prevent files from being **accidentally overwritten**, users can initiate a **check out** first before editing the file.

Once the file has been updated, a new **version** is created and **check in**. After the file has been **checked in**, other user can use the **updated version** to continue.

5.7.2 Manual Check Out a File

In some organisation's implementation, the file is automatically checked out the moment a user opens the file for editing. See Online Edit section. Assuming you would like to manually check out a file:

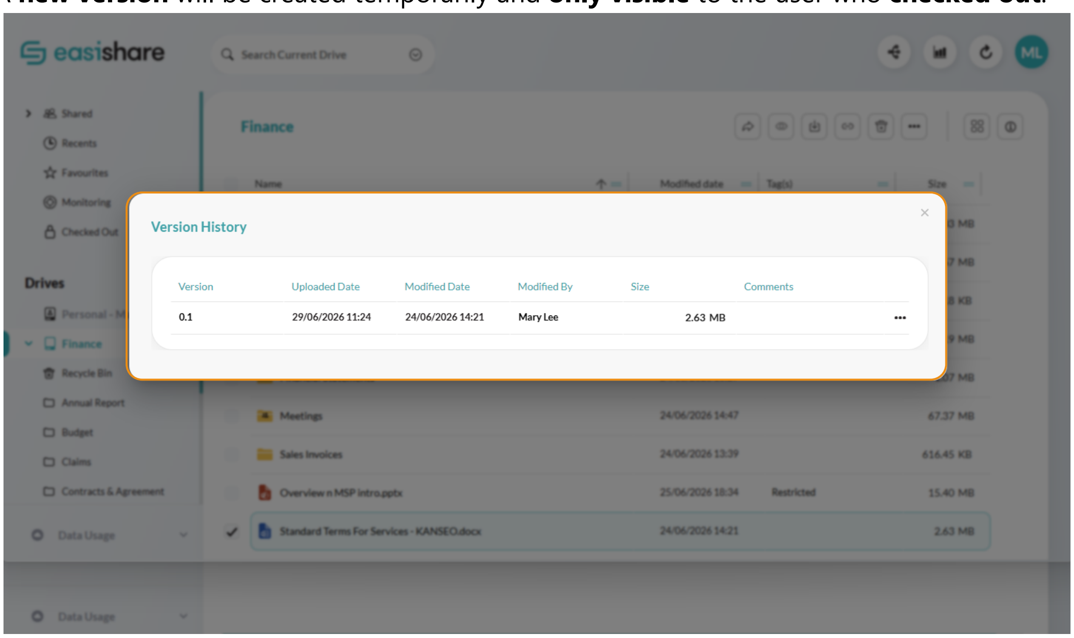
1. Select the file you wish to check out.
2. Click on **More** icon then select **Check Out**. Alternatively, you can **right-click** on the file you want and select **Check Out** from the menu.



3. A success message will appear. 

4. A checked out icon  will overlay on the file icon.

5. A **new version** will be created temporarily and **only visible** to the user who **checked out**.



6. You can choose to edit or overwrite the file except **rename, move** or **delete**.

Note:

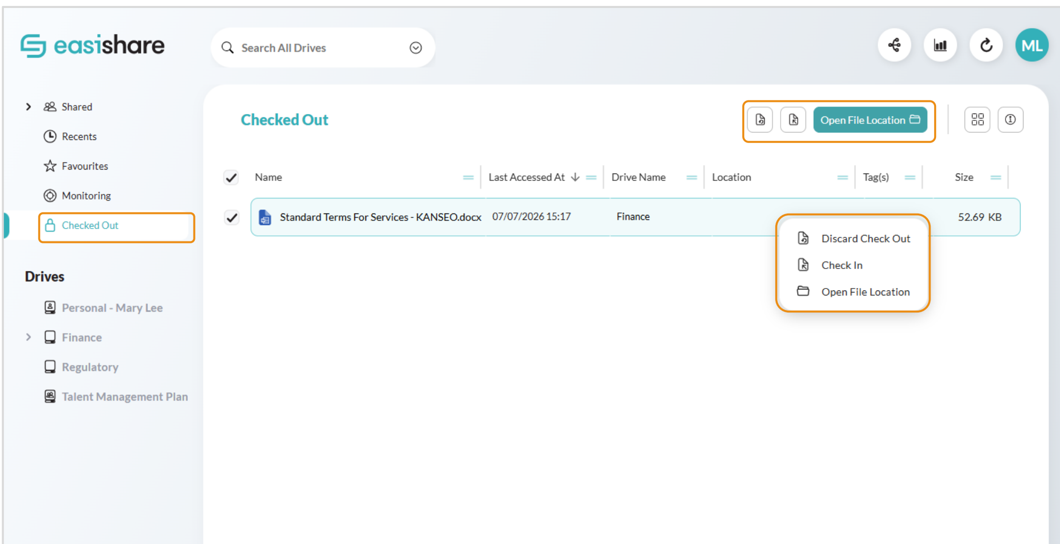
When you or other user are sharing a "checked out" file, the version that is shared will be based on the version prior to your check out. Even if you have overwritten the current file, as long as the file has not been checked in, there is no increment of version.

What does other collaborators see and do when a file is checked out?

1. A lock icon will overlay on the file icon. You may hover over the **lock icon** to find the name of the user who checked out the file.
2. Find the previous version details on the Version History.
3. Restricted from performing certain file operations such as **edit/overwrite**, **delete**, **rename** or **move** a file that has been checked out.
4. **Preview, download, copy and share** the earlier versions during the checked out period.

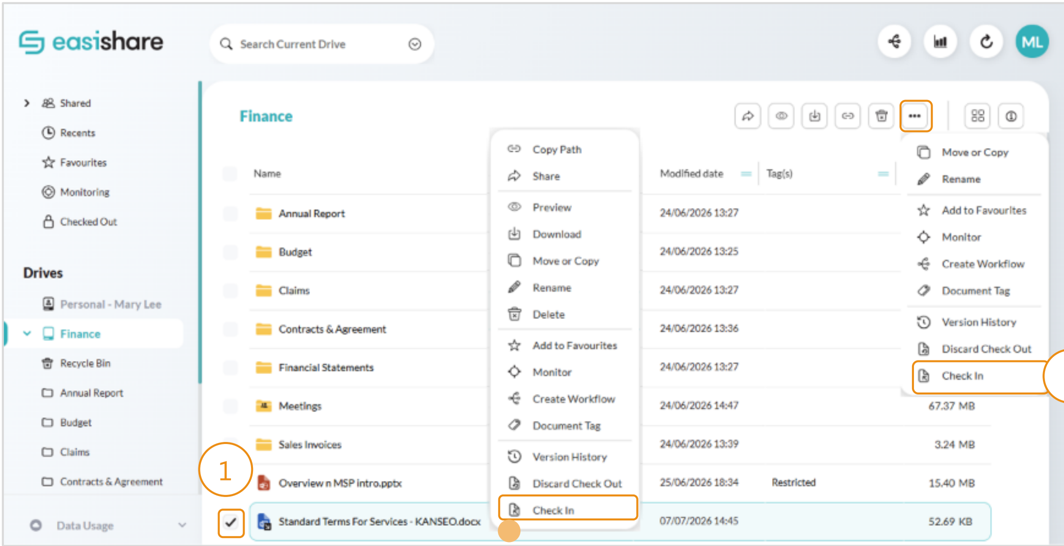
Tip: Shortcut to Checked Out file

1. At the left navigation bar, select **Checked Out** and you can view the file(s) that you have checked out.
2. Use this shortcut to bring you to the file location or perform **check in** or **discard check out**.

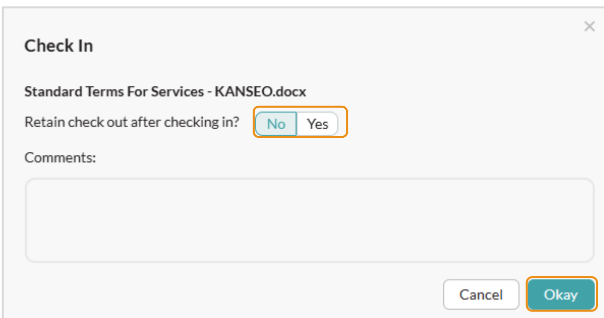


5.7.3 Check In

1. Select the file that was **Checked out.**
2. Click on More icon and select **Check In**. Alternatively, you can right-click on the file you want and select **Check In** from the menu.

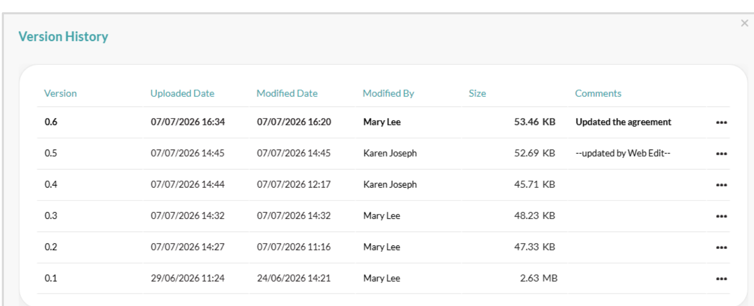


3. In the pop-up window, click **Yes** Or **No**. Yes is to **retain** “Check out” after checking in and **No** is to **remove** “Check out” after checking in. Comment in the **Comment** text box. Click **Okay**



4. The lock icon on the file will **disappear** and a success message will appear.

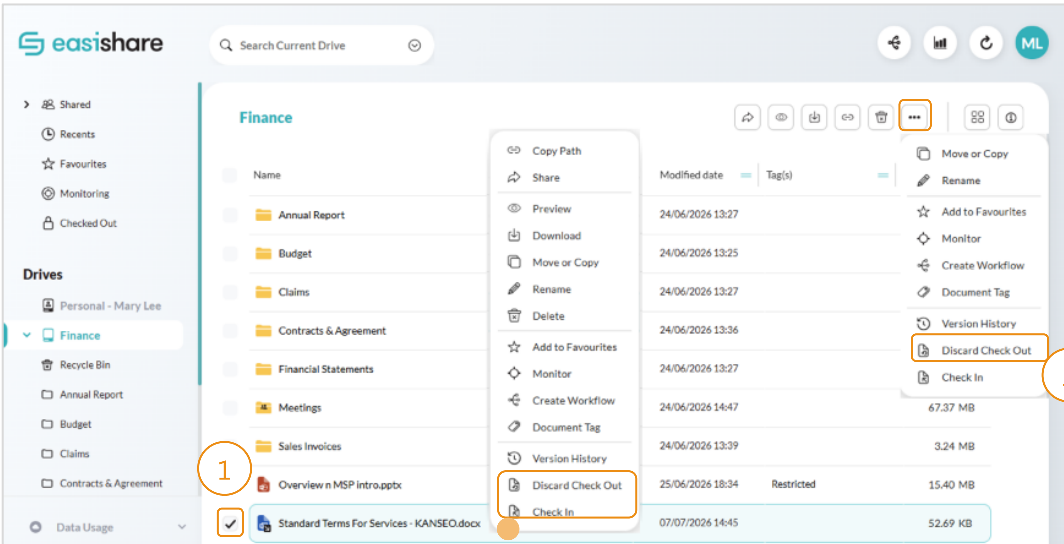
5. The **version** number that was created during **check out** will be recorded. This version is visible to all users.



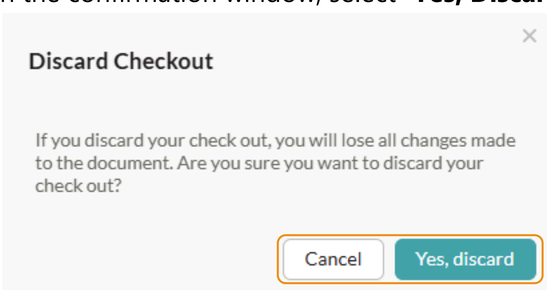
6. Post **check in**, **all actions** are available to all users. Any users can choose to perform any file actions **as per normal**.

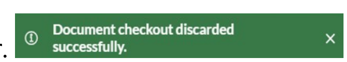
5.7.4 Discard Check Out

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



4. In the confirmation window, select "**Yes, Discard**".



5. The lock icon on the file will **disappear** and a success message will appear. 

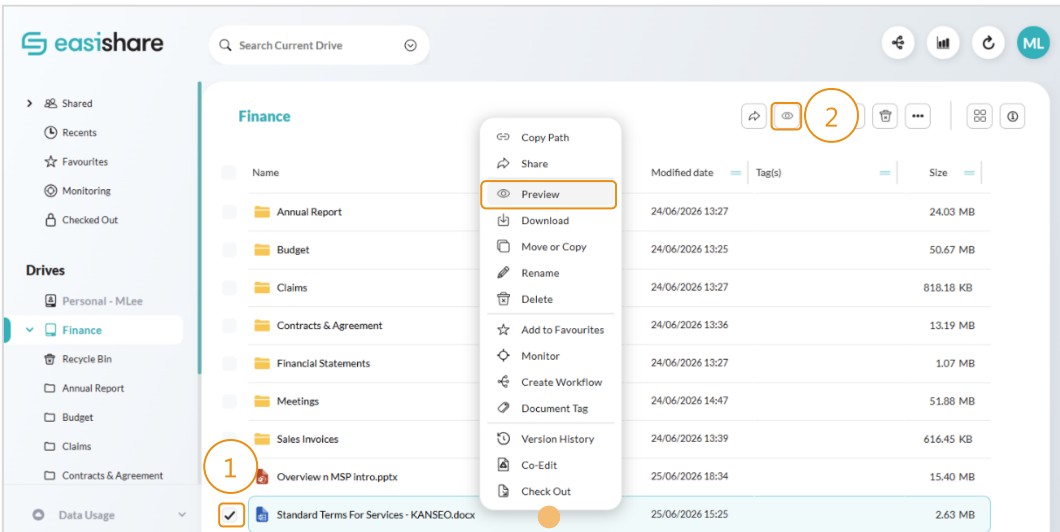
6. The "temporary" **version number** that was created **during check out** will be **discarded**.
7. Any users can choose to perform any file actions **as per normal**. **All actions** are **available** to **all users**.

5.8 Preview

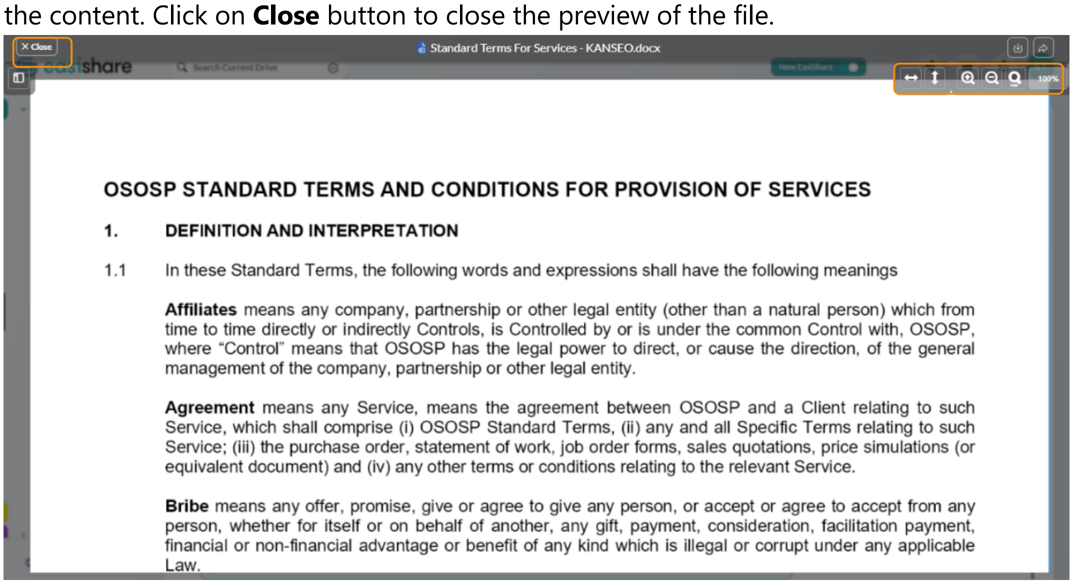
Office and PDF files can be previewed without having to download.

5.8.1 Full Preview

1. Select the file you want to preview.
2. Click the **Preview** icon.

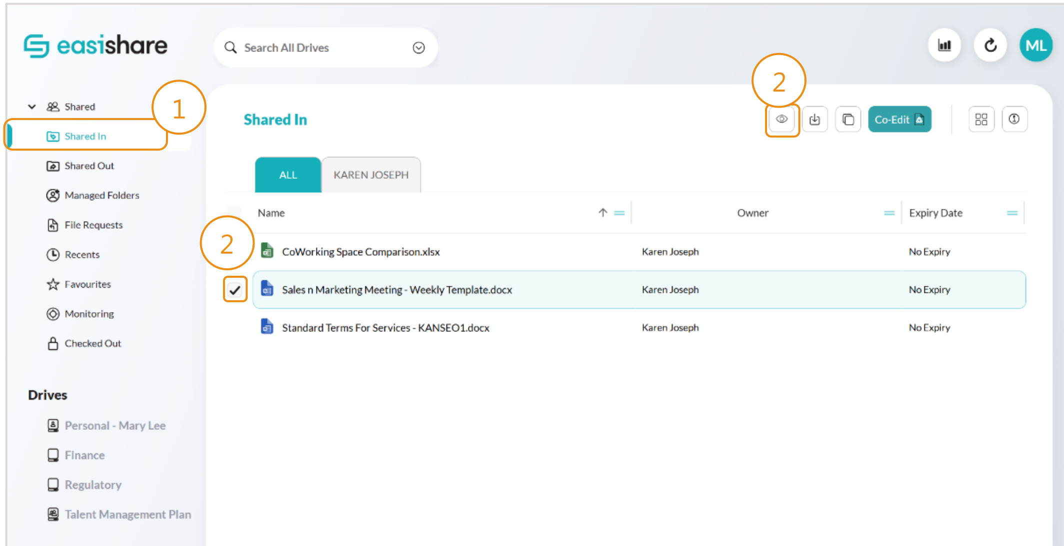


The document will appear on the pop-up window. You can scroll, expand/reduce the size as you view the content. Click on **Close** button to close the preview of the file.

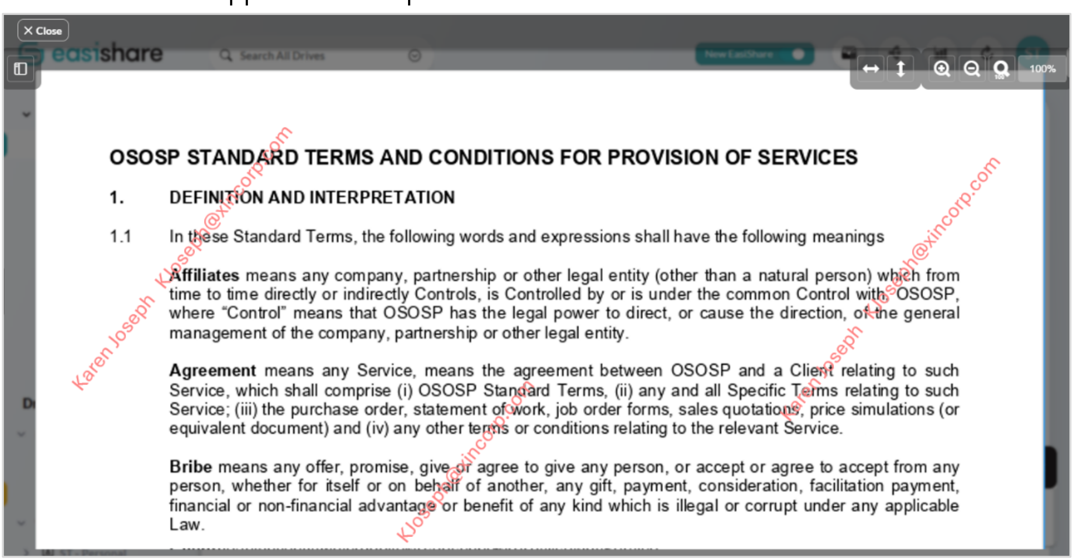


5.8.2 Preview a file with Viewer Permissions

1. Navigate to the **Shared In** folder under the shortcut of Shared.
2. Select the file and click **Preview** .



3. A new window will appear with the preview of the file.

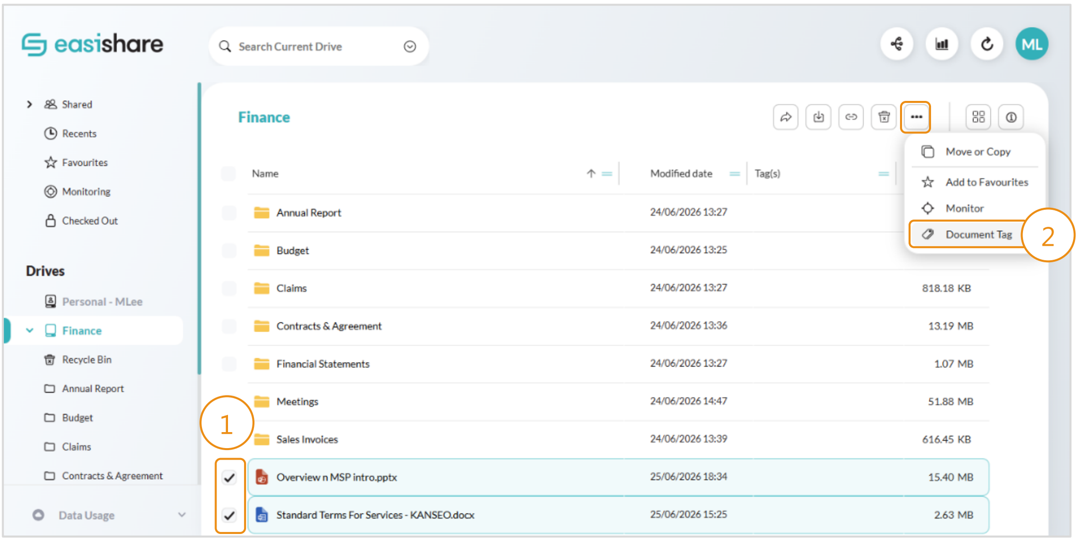


Note:

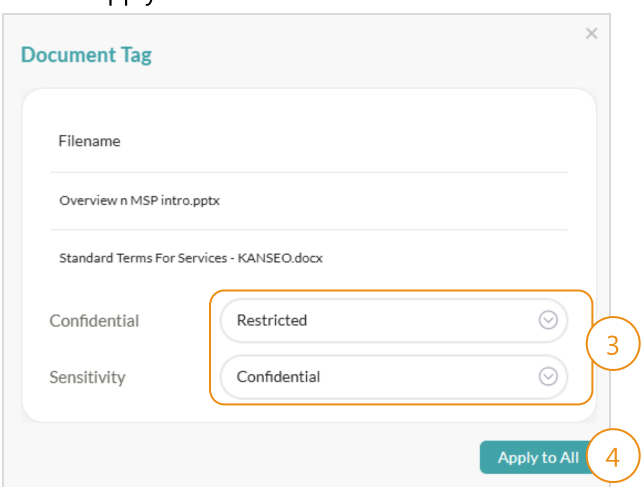
Users with Viewer permissions previewing a file will have a watermark displaying the user's name and email address.

5.9 Document Tag

1. Select the file (s) by clicking on the checkbox beside the file name(s). You may select multiple file(s) at a time.
2. Click on **More** ••• then select on Document Tag icon.

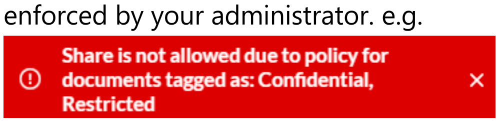


3. Select the tags for the file(s).
4. Click on Apply.



Note:

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



6 Differentiating purpose of Share, File Request & Manage

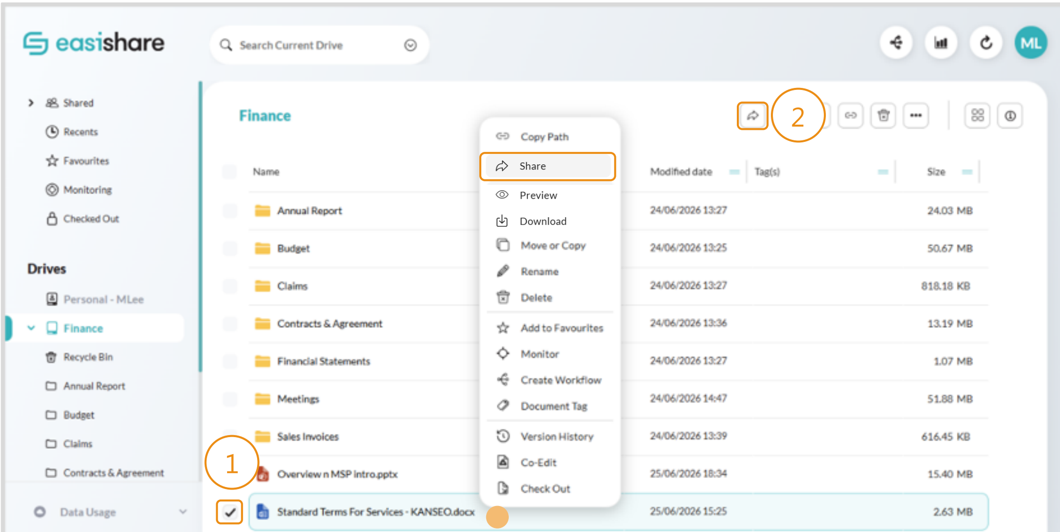
Besides uploading and managing your own files, you may want to share files and folders within or outside your organisation. There are different ways you may want to note when using the "Share" function in EasiShare. Here are the 3: **Manage, Share, File Request**

Function	**Manage** to Collaborate	**Share** for 1-way file sharing	**File Request** for receiving files
Scenarios	I am working on a project and want to collaborate with others to allow them to contribute files for a project. We upload and delete files in the same folder.	I want to send documents to my vendor to download.	I want my partner to upload their project for my review. I want the receive proposals from bidders.
Initiator's Actions	Manage the folder and set permission. The invitation can be made to both an EasiShare account user or one without an account.	Share file or folder. Customise the security settings when sharing e.g. OTP, Link Expiry, View Only	Initial a File Request. Customise the security settings when requesting for file e.g. OTP, Link Expiry, File Type
Indicators			-
Recipient's Receive	• Email notification of the folder being shared	• Email notification of the file(s) being shared	• Email notification of a request to upload files
Recipient's Actions	• Click on link to access the folder • Continue to upload/download files (subject to the permission given)	• Click on link to download or only view the file(s) • No upload is allowed	• Click on link to upload the file(s) • No download is allowed

6.1 Share

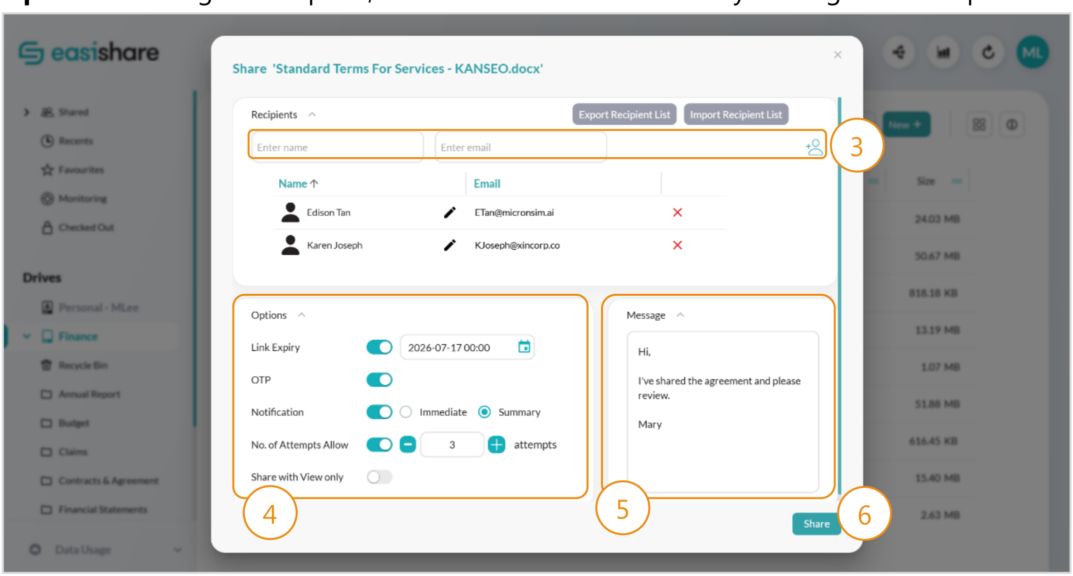
6.1.1 Initiating a Share

1. Select the file/folder(s) you wish to share. You may select multiple file/folder(s).
2. Click on **Share** icon. Alternatively, right click on the file/folder(s) and select **Share** from the menu.



3. Enter the recipient's name and email. Click on to add the recipient.

   Tips: After adding the recipient, the **name** can still be edited by clicking on the respective fields.



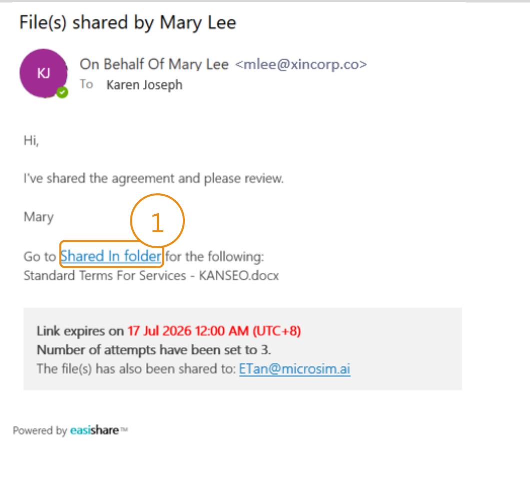
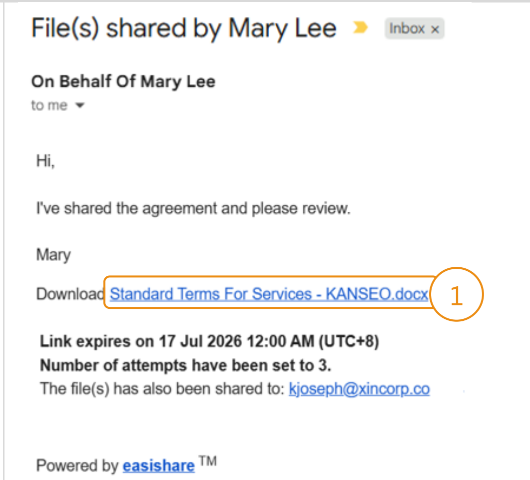
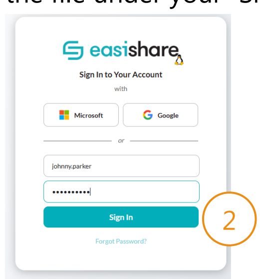
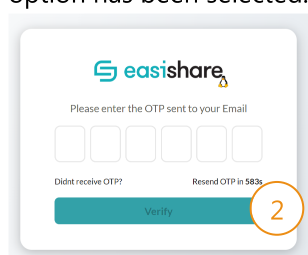
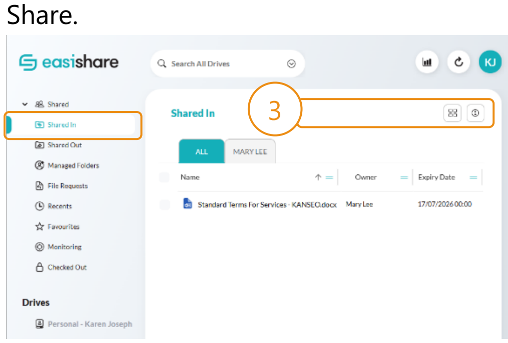
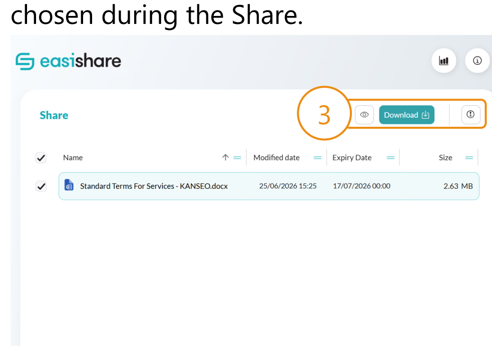
4. Expand the Options and customise the **security settings** you wish to apply. To find out how each feature works, refer to **Advanced Share Options** section.
5. Optional: Enter your message.
6. Click **Share**.

   Note: You may have to select the checkbox if your organisation turns on this notice.

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

6.1.2 Accessing the Shared File/Folder(s)

1. Both the recipient and initiator (sender) receive an email notification containing the link.
2. Upon clicking on the link, depending on the recipient's profile, there are 2 possible outcomes:

	Has a Registered EasiShare account	Without EasiShare account
Email Received	 File(s) shared by Mary Lee On Behalf Of Mary Lee <mlee@xincorp.co> To Karen Joseph Hi, I've shared the agreement and please review. Mary Go to Shared In folder for the following: Standard Terms For Services - KANSEO.docx Link expires on 17 Jul 2026 12:00 AM (UTC+8) Number of attempts have been set to 3. The file(s) has also been shared to: ETan@microsim.ai Powered by easishare™	 File(s) shared by Mary Lee Inbox On Behalf Of Mary Lee to me Hi, I've shared the agreement and please review. Mary Download Standard Terms For Services - KANSEO.docx **Link expires on 17 Jul 2026 12:00 AM (UTC+8)** **Number of attempts have been set to 3.** The file(s) has also been shared to: kjoseph@xincorp.co Powered by easishare™
Link Destination	The link will prompt you to sign in and view the file under your "Shared In" folder. 	The link will bring you to a page. Recipient may be required to key in the OTP if this option has been selected. 
Actions Allowed or Additional Security Settings	Recipient may view or download the file based on the options chosen during the Share. 	Similarly, the recipient may may view or download the file based on the options chosen during the Share. 

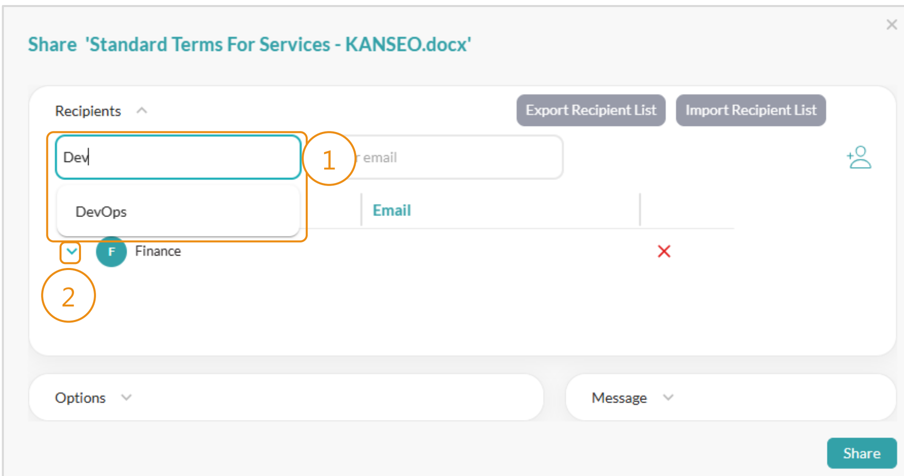
Note: During the duration of Share, if the initiator updates the content, the recipient will see the updated version if the download is performed after the download.

6.2 Advanced Share Options

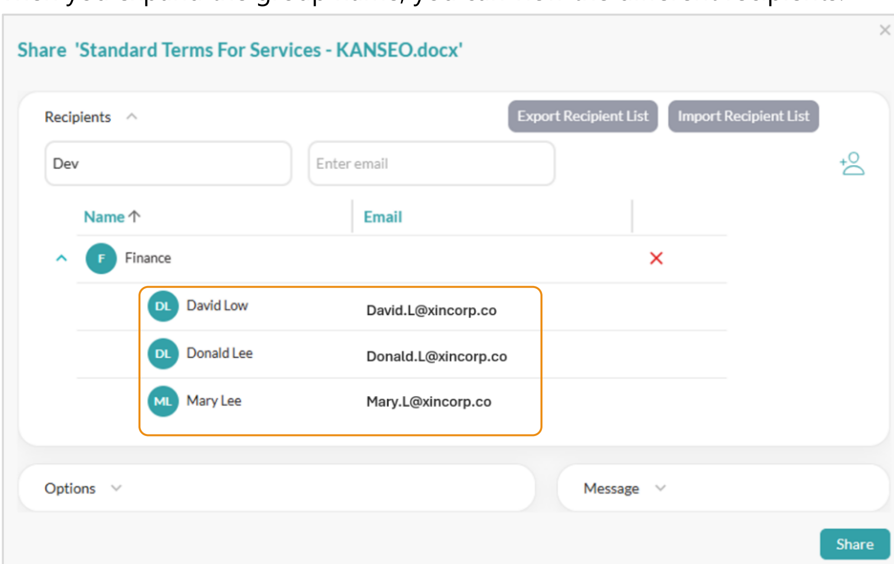
Some features may be controlled by your administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.

6.2.1 Sharing with Groups

1. Enter the **group name** and select from the dropdown list. These group name(s) are setup by the EasiShare admin and consist of users who have EasiShare accounts.

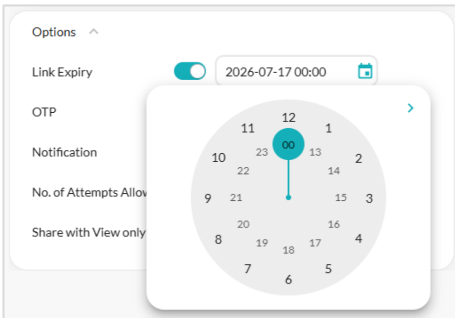


2. When you expand the group name, you can view the different recipients.



6.2.2 Share with Link Expiry

1. Enable **Link Expiry**.
2. Set the date and time by clicking on the **calendar icon**.

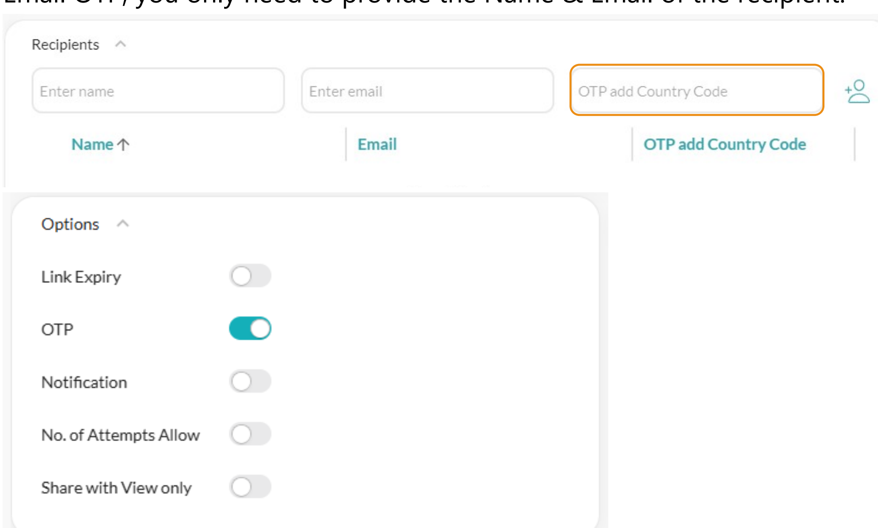


Note:

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

6.2.3 Share with One Time Password (OTP)

1. The OTP in your organisation can be setup for SMS/WhatsApp **or** Email.
2. If it is SMS/WhatsApp, mobile number of the recipient must be provided when OTP is enabled. If it is Email OTP, you only need to provide the Name & Email of the recipient.

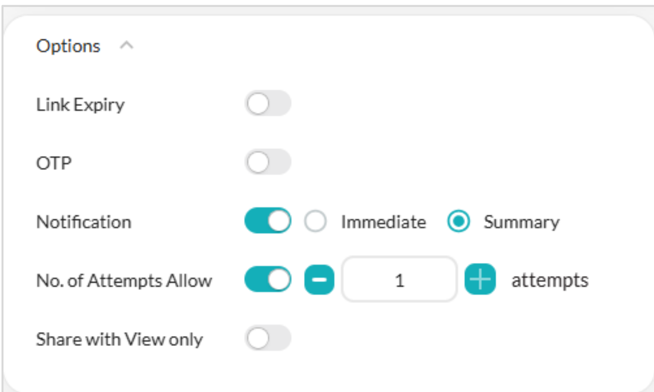


Note: This feature may also be controlled by your administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.

6.2.4 Receive Email Notifications When User Accessed the File/Folder(s)

Enabling 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.

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 recent period.



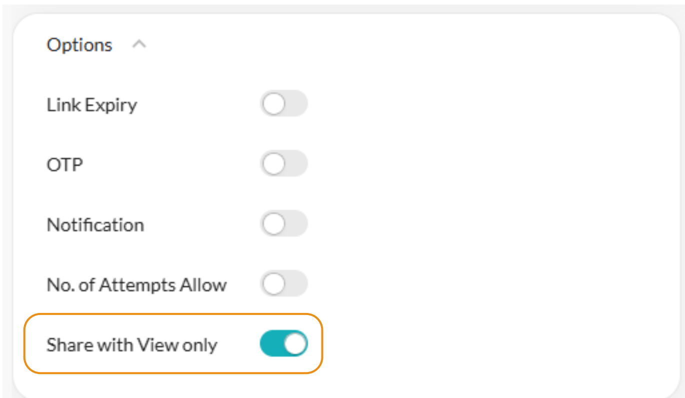
6.2.5 Number of Download Attempts

This option enables you to limit the number of times the recipient can download the file. When the recipient reaches the limit, no further download is allowed unless the sender initiates another Share.

1. Enable **No. of attempts Allow**
2. Set **the number of attempts** the user can download the file

6.2.6 Share with View or Download Permission

1. Decide if you want the recipient to download or just view the file(s).
2. If you have turned on the **Share with View only** option, the recipient cannot download the file and only can view it online. Once the Share expires, the recipient can no longer access the file. When toggle is OFF, it means the recipient can download the file(s).



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

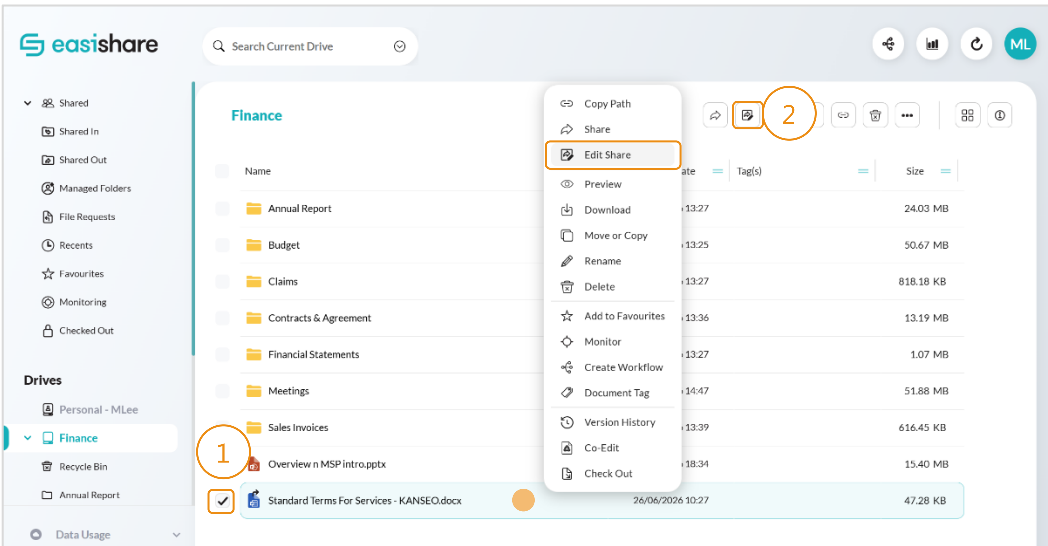
6.3 Edit/Remove Share

There are two ways to **edit** and **remove** a share. The **file's original location** or the '**Shared Out'** folder. There are few possibilities you may perform under the **Edit Share** function:

- **Resend Email** to recipient (if they may not receive the previous email notification)
- **Remove the Share** from individual or all the recipients
- **Edit selective Options** that have been setup previously.

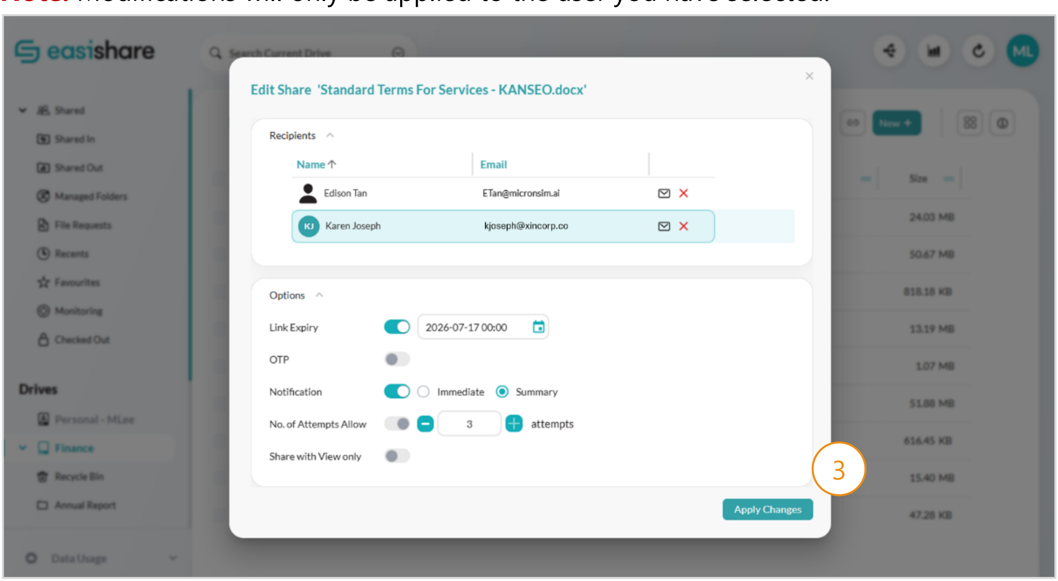
6.3.1 From File's Original Location

1. Navigate to the file location where you have shared and select the file/folder.
2. Click on **Edit Share** icon. Alternatively, right click on the file/folder(s) name and select **Edit Share** from the menu.



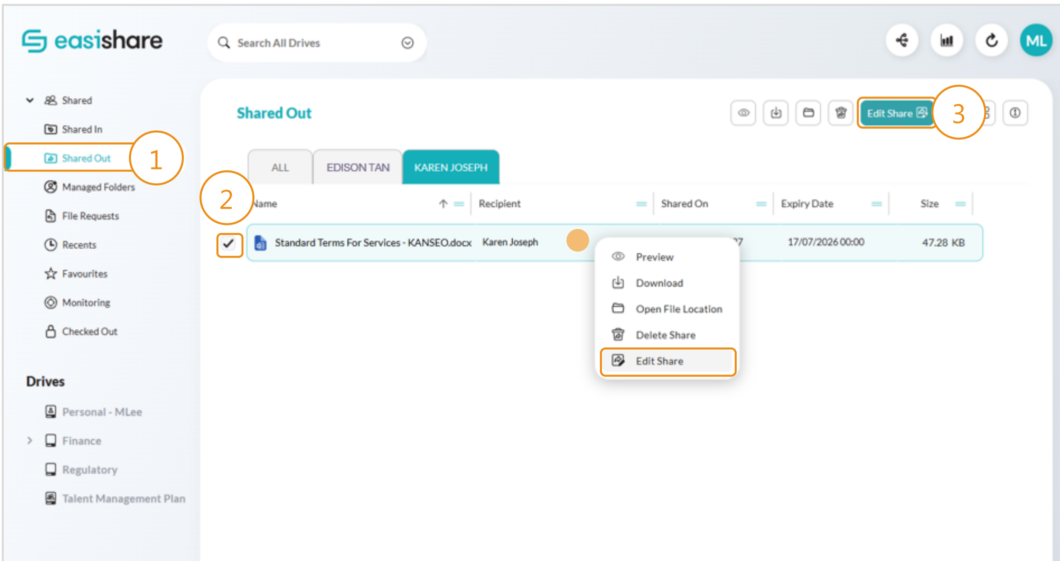
3. You may perform the **edits** or **removal** of recipients, then **Apply Changes**.

Note: Modifications will only be applied to the user you have selected.

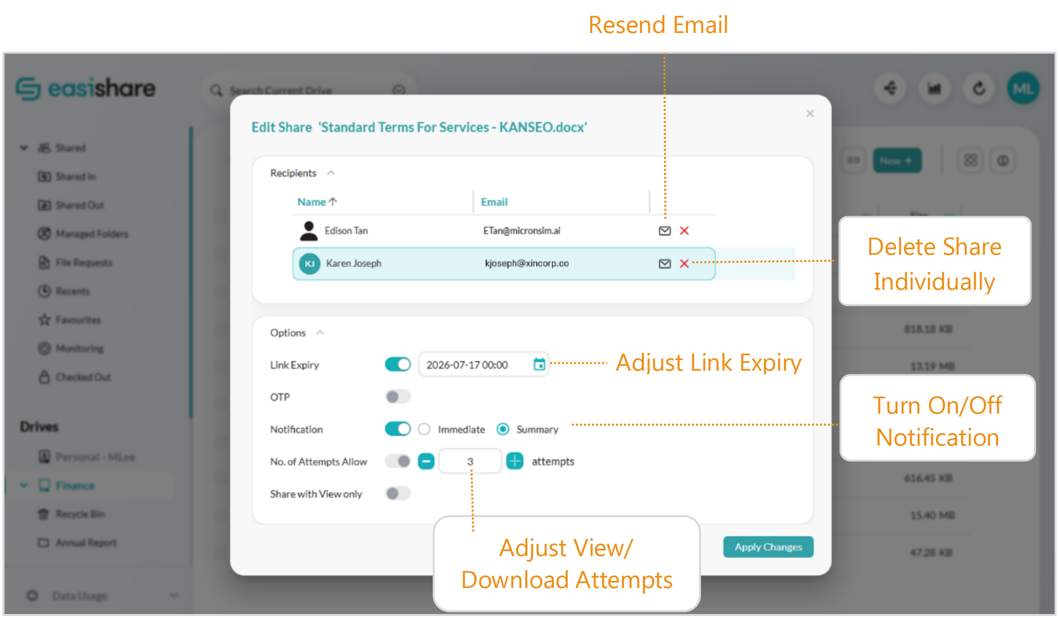


6.3.2 From Shared Out Folder

1. Navigate to the **Shared Out** shortcut under **Shared**.
2. Go to the recipient's name and select the file/folder.
3. Click on **Edit Share** icon. Alternatively, right click on the file/folder(s) name and select **Edit Share** from the menu.



6.3.3 Possibilities in Edit Share

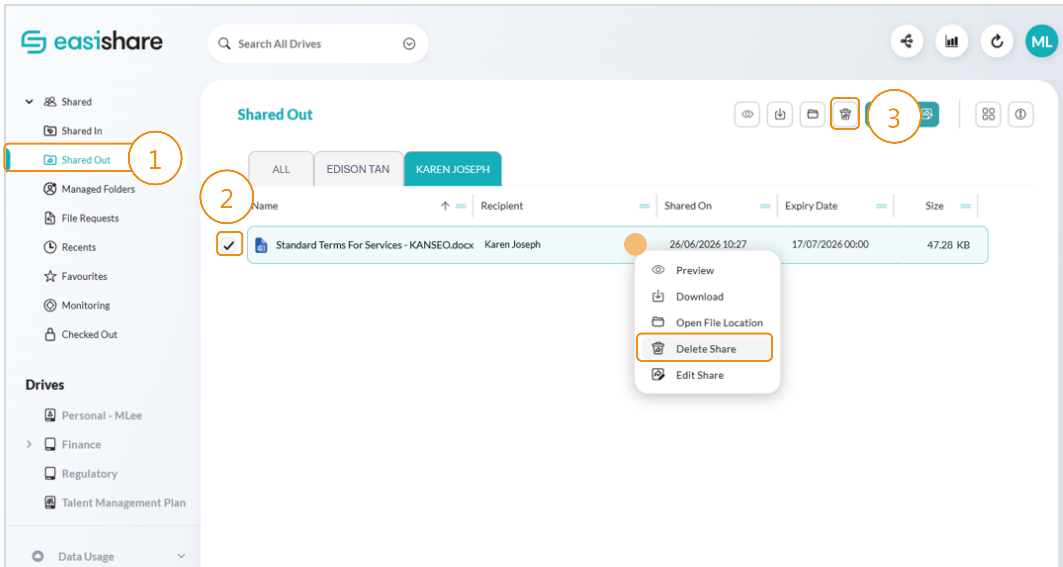


Note: Some features may be controlled by your administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.

6.3.4 Delete Share

Besides using the ✕ Delete icon during an **Edit Share**, a quick way to remove individual recipient from the Share is to:

1. Navigate to the **Shared Out folder**.
2. Select the file name under the Recipient's name
3. Choose **Delete Share** icon or right-click to select **Delete Share**.

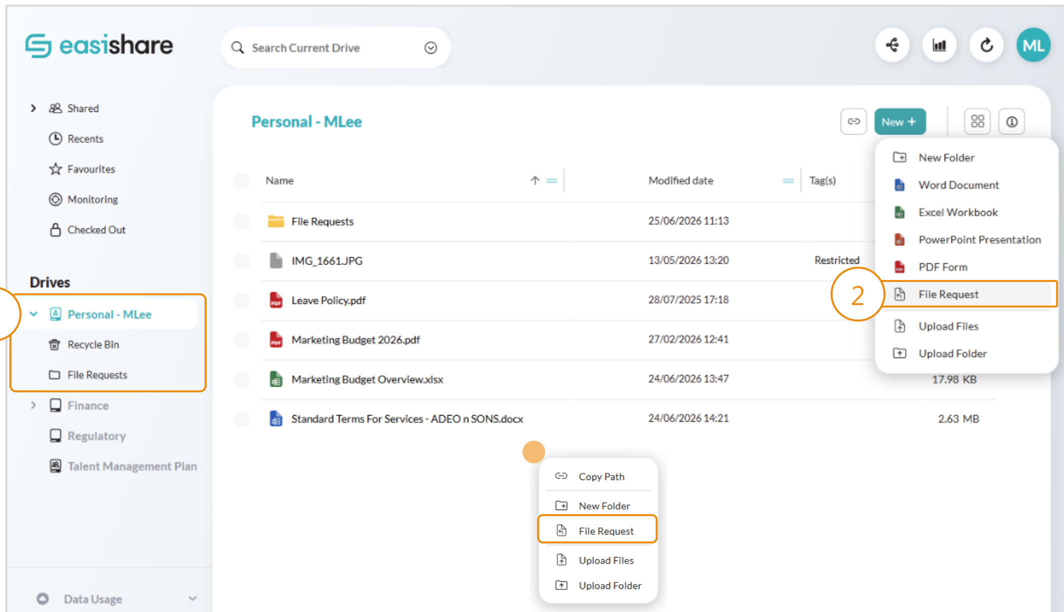


7 File Request to Receive Files

7.1 File Request

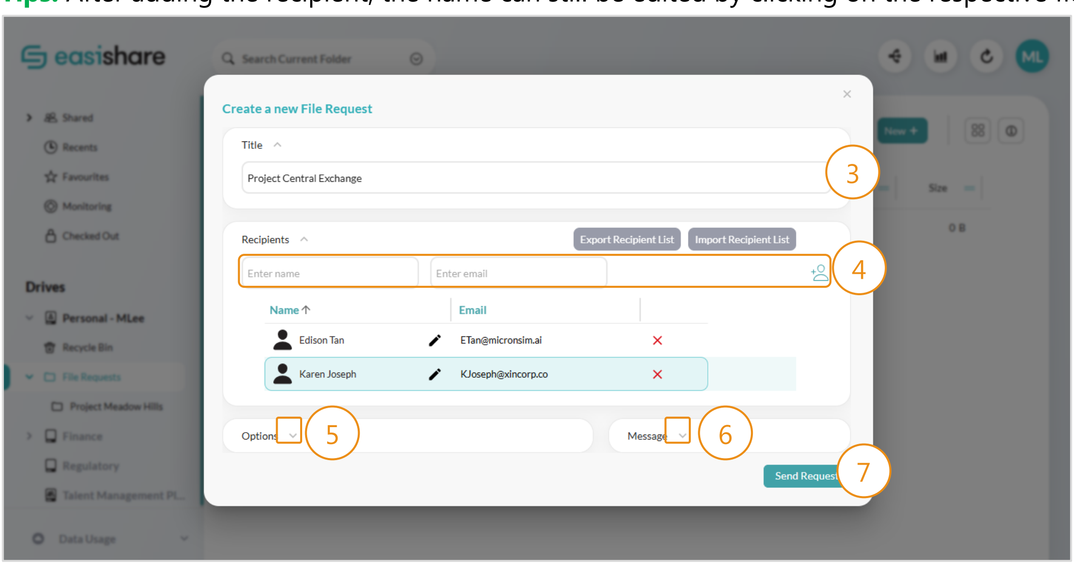
7.1.1 Initiating a File Request

1. Go to the **Drive** which has a **File Requests** folder.
2. Click on **New+** then **File Request** icon. Alternatively, right click and select **File Request** from the menu.



3. Enter the title of the file request.
4. Enter the recipient's name and email. Click on to add the recipient.

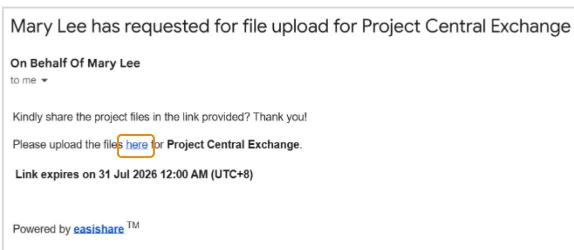
Tips: After adding the recipient, the name can still be edited by clicking on the respective fields.



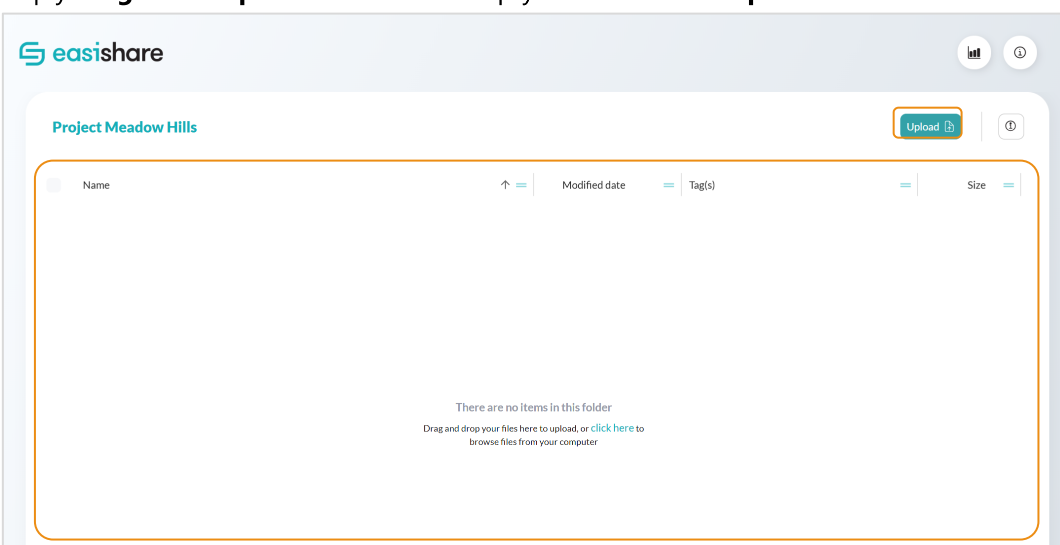
5. Expand the Options and customise the **security settings** you wish to apply. To find out how each feature works, refer to Advanced File Request Options section.
6. Optional: Enter your message.
7. Click **Send Request**.

7.1.2 Uploading files into the File Request folder

1. Both the recipient and initiator (sender) receive an email notification containing the link.
2. Upon clicking on the link, the recipient will be directed to the upload page.
   Note: Recipient may be required to key in the OTP if this option has been selected.



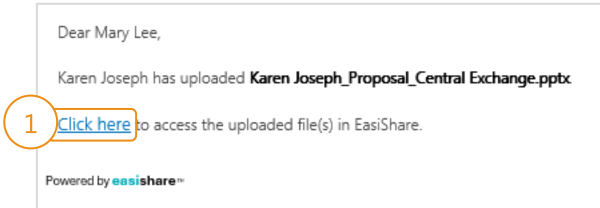
3. Simply **drag and drop** the files into the empty area or click on **Upload** button.



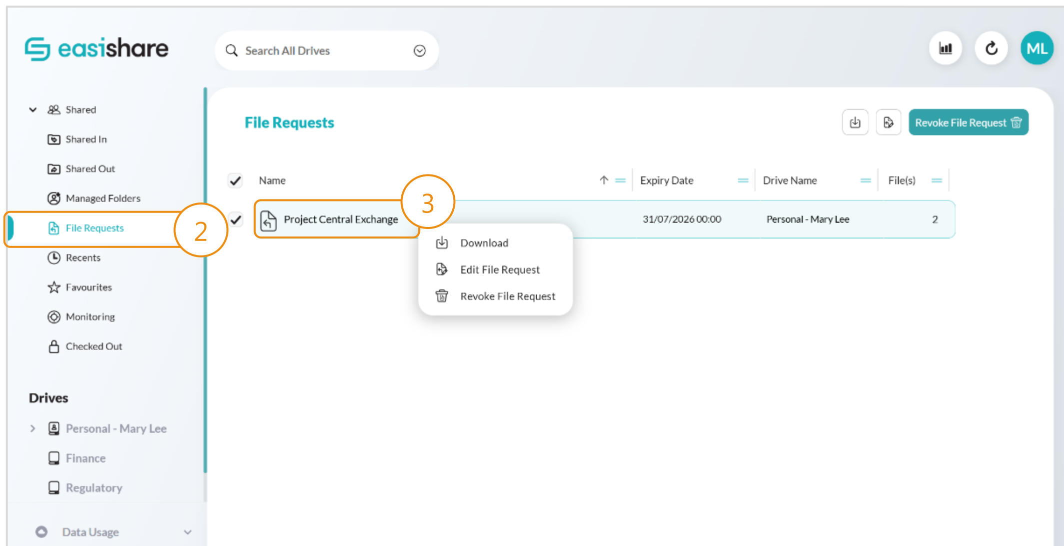
4. When files have been uploaded, the sender (initiator) will receive an email notification.

7.1.3 Initiator's View of Uploaded Files

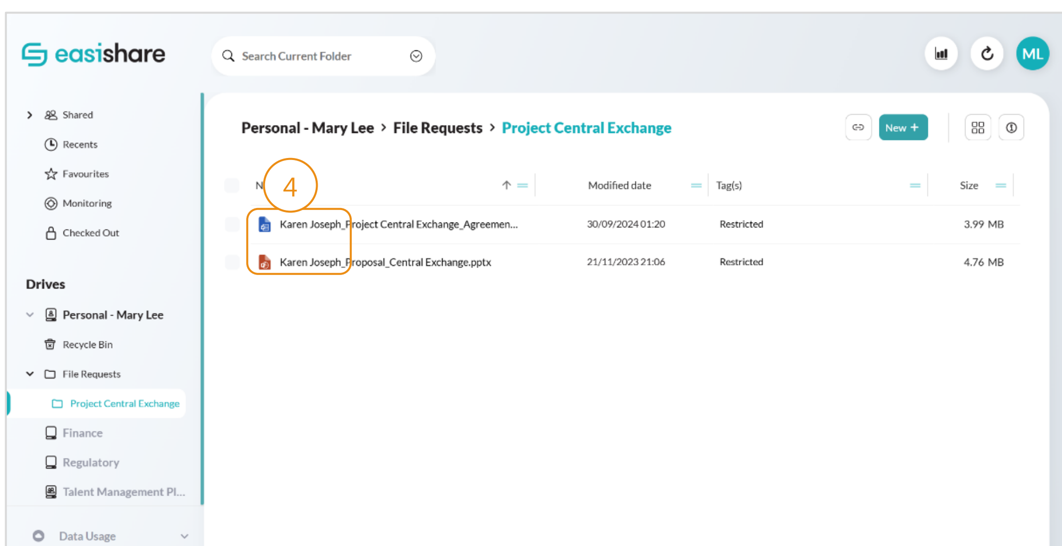
1. Either click on the link in the email to be directed to the folder



2. Or Login to EasiShare then click on the **Title** under the **File Request** folder of the **Personal** drive.
3. Select the files download or perform other file operations.



4. When clicking on the **Name**, it will bring to the folder location and all the files that have been uploaded can be viewed. The file names will be prefixed with the name of the person who uploads the files.

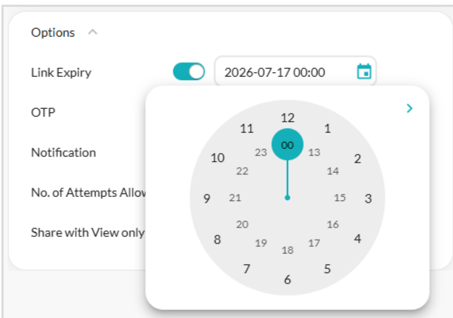


7.2 Advanced File Request Options

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.

7.2.1 Request with Link Expiry

1. Enable **Link Expiry**.
2. Set the date and time by clicking on the **calendar icon**.

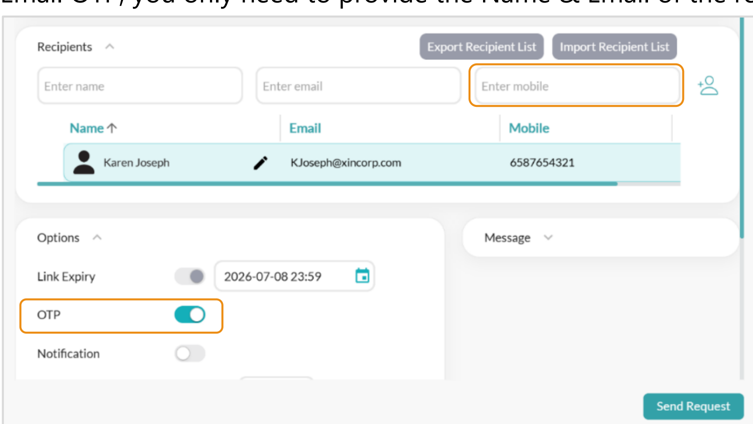


Note:

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. 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.
4. After the folder expires and a pre-defined number of days set by your administrator, the folder will be automatically purged by the system. **Copy to other folder locations** if you like to keep the files.

7.2.2 File request with One-Time Password

1. The OTP in your organisation can be setup for SMS/WhatsApp **or** Email.
2. If it is SMS/WhatsApp, mobile number of the recipient must be provided when OTP is enabled. If it is Email OTP, you only need to provide the Name & Email of the recipient.



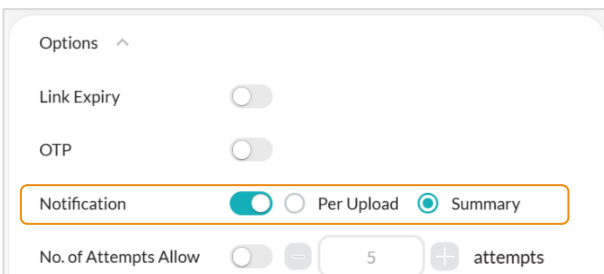
Note:

1. This feature may also be controlled by your administrator. If you are unable to enable or disable, it may be due to your organisation policy settings.
2. To enable SMS/WhatsApp OTP, contact number field is mandatory.
3. For Email OTP, there is no need to provide mobile number.

7.2.3 Receive Email Notification When User Upload Files

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

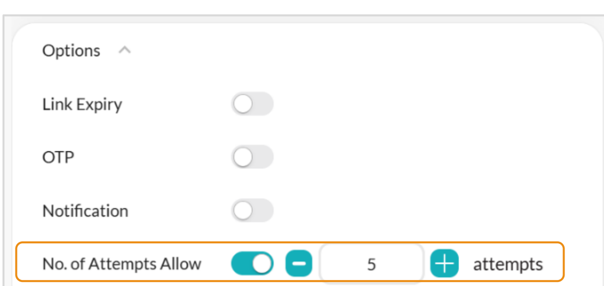
Immediate: An email will be sent to your inbox whenever a file is uploaded
Summary: An email will be sent to your inbox at regular intervals to inform you of all uploads which occurred in the recent period.



7.2.4 Number of Upload Attempts

This option enables you to limit the number of times the recipient can upload the file. When the recipient reaches the limit, no further upload is allowed unless the sender initiates another File Request link.

1. Enable **No. of attempts Allow**
2. Set **the number of attempts** the user can upload the file



7.2.5 Restrict File Size and File Types

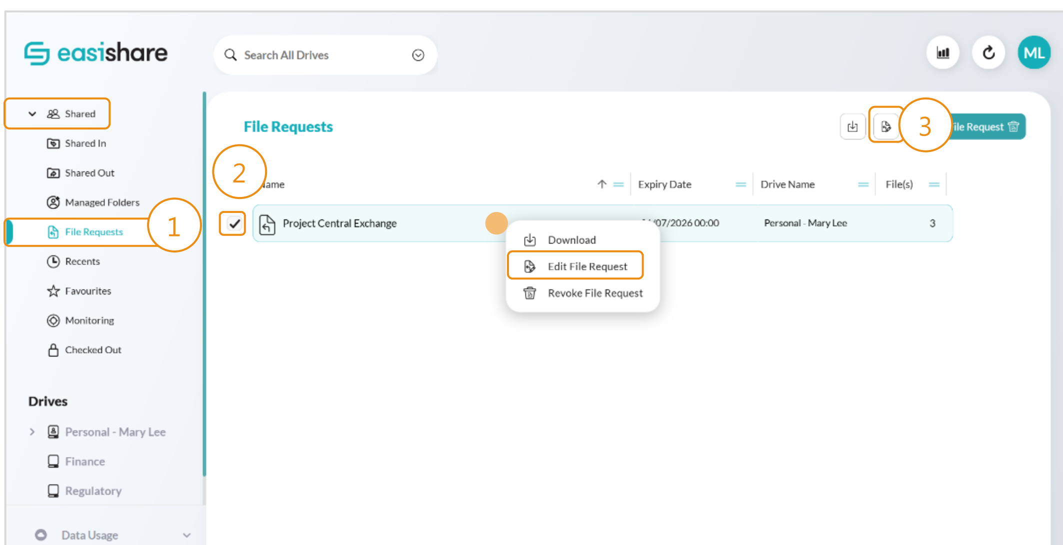
Note: To optimize network performance and security, organizations typically enforce standard limits on individual file upload sizes alongside a True File Type verification check. Consequently, these advanced security policies are preset by system administrators and cannot be modified by standard users.

If this policy is not enabled, users can manually configure the maximum **File Size limit** in MB or GB. For File Type Restrictions, you can leave the field blank to permit all file types, or select either **Allow all except** or **Block all except**. When listing multiple file extensions, separate each entry with a **comma** (e.g., .pdf, .docx).

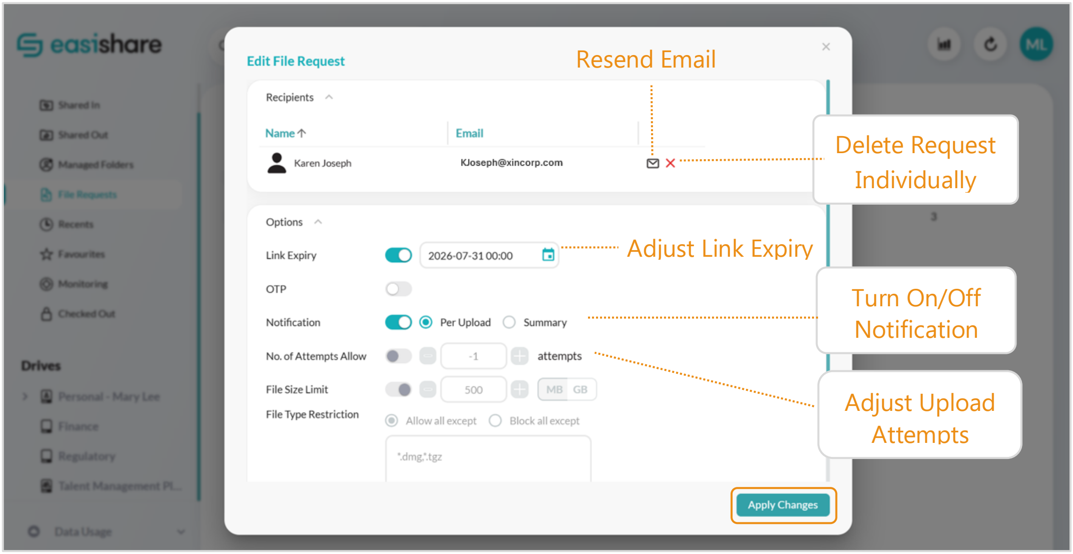
7.3 Edit/Remove File Request

7.3.1 Edit File Request

1. Navigate to the **File Request** shortcut under **Shared**.
2. Select an active File Request **Name**.
3. Click **Edit File Request**  icon. Alternatively, right click on the name and select **Edit File Request** from the menu.



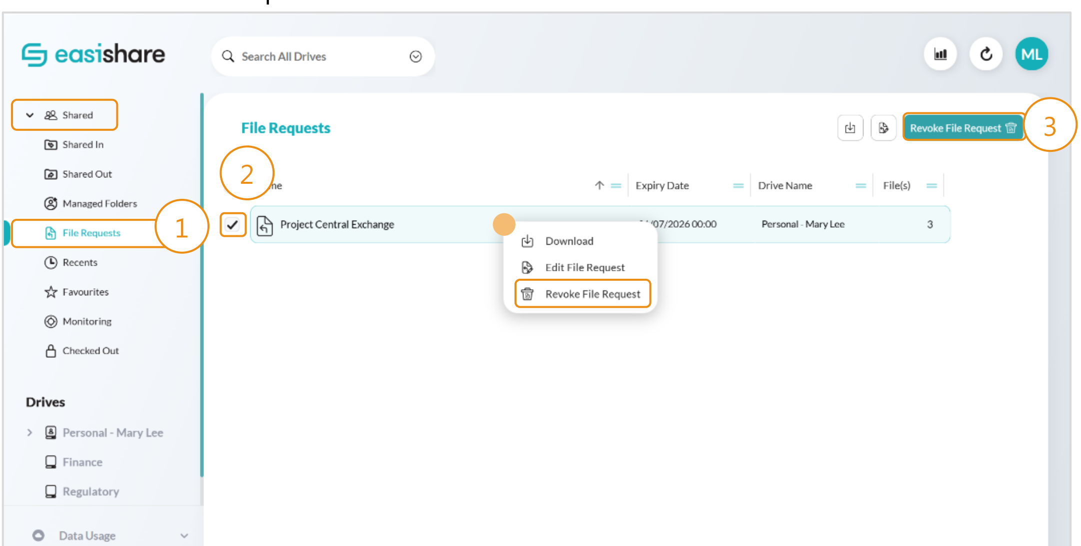
4. Click on **Options** to adjust some of the advanced settings.



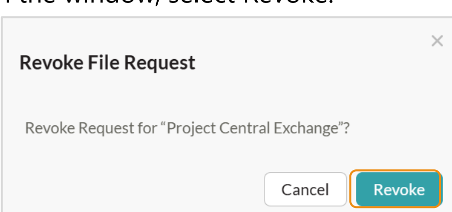
5. Click on the **Apply Changes** button.

7.3.2 Revoke File Request

1. Navigate to the **File Request** shortcut under **Shared**.
2. Select an active File Request **Name**.



3. In the window, select Revoke.



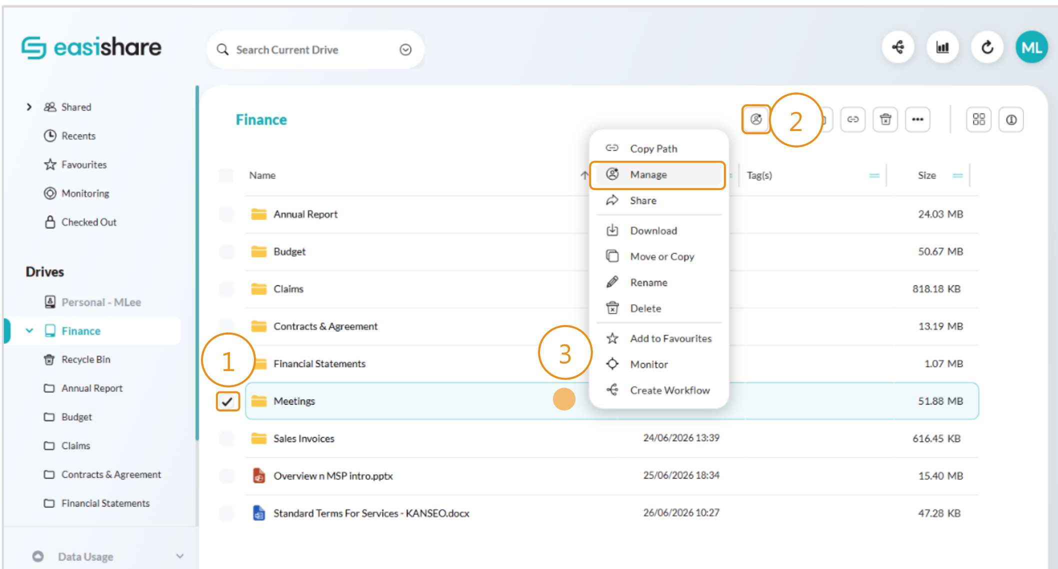
Note: If file(s) have been uploaded, it remains in the File Request folder even after the Request has expired or revoked.

8 Manage Folder to Collaborate

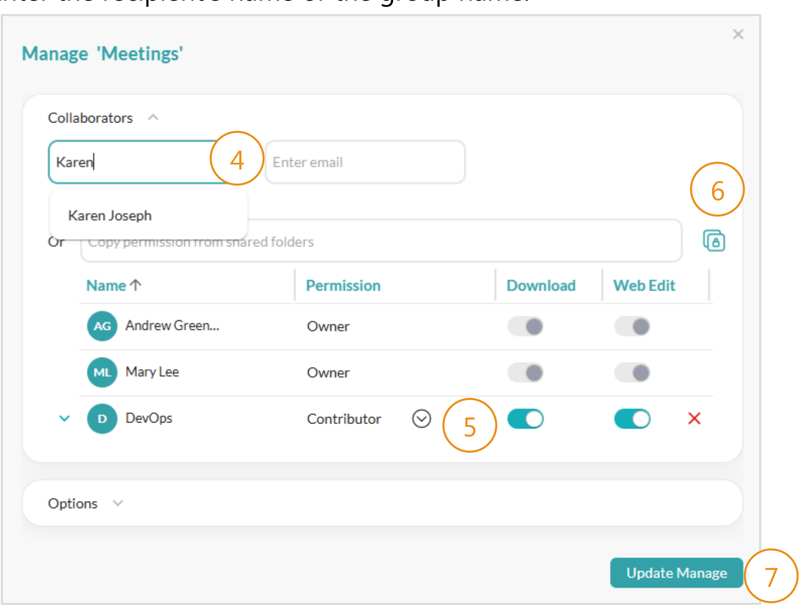
8.1 Manage Folder

8.1.1 Owner Setup Permissions to Share Folder

1. Navigate to the folder you wish to collaborate with other users. Select the folder.
2. Click on **Manage** icon.



3. Alternatively, right click on the folder(s) name and select **Manage** from the menu.
4. Enter the recipient's name or the group name.

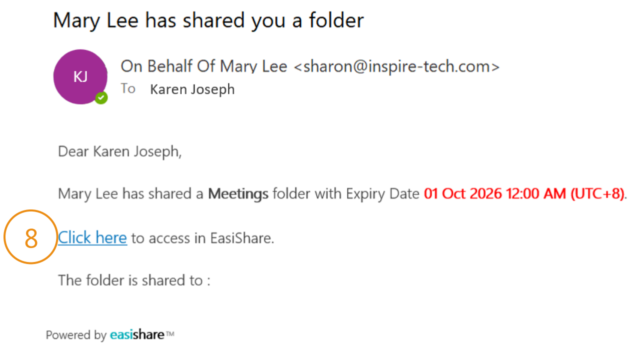


5. Assign the permission type you wish to give to the user/group.
6. If you wish to copy permissions that has already been set from another folder, select the folder name from the dropdown list and click on the copy icon.

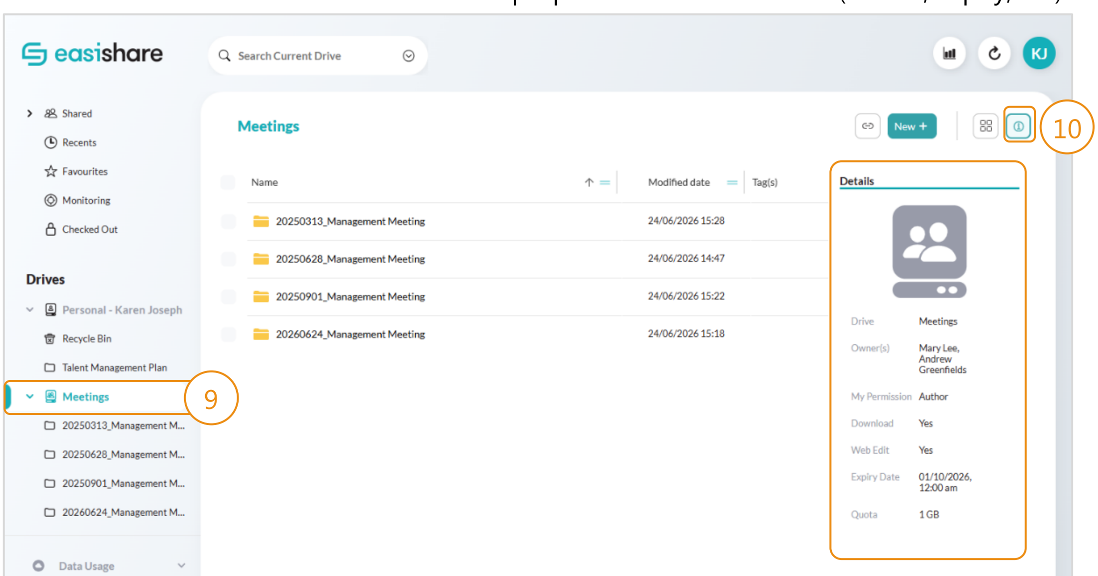
7. Click **Update Manage** to have a quick start to collaborate.

8.1.2 EasiShare User's View

8. When the permission has been granted, the user will receive an email notification.



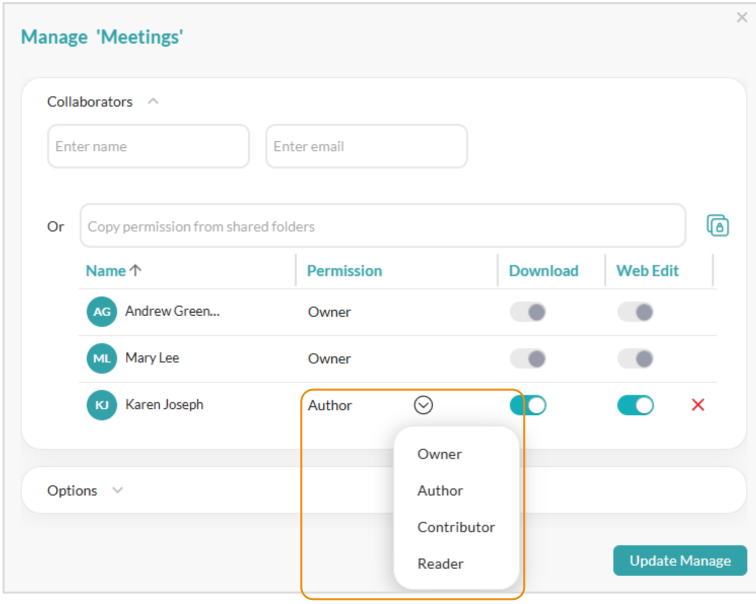
9. The invited user will see the **Shared folder** appearing on the Drives. User can perform the file operations (Create/Edit/Delete/View) according to the permissions granted.
10. Click on the **Info** ⓘ icon to view additional properties about the folder (Owner, Expiry, etc).



8.1.3 Owner Edit and Remove Permissions

1. The steps to edit permission are similar to how a new permission is being created.
2. To remove permission, click on the corresponding Remove ✕ icon.
3. Click on **Update Manage** to save the changes.

8.1.4 Collaboration Permission Types



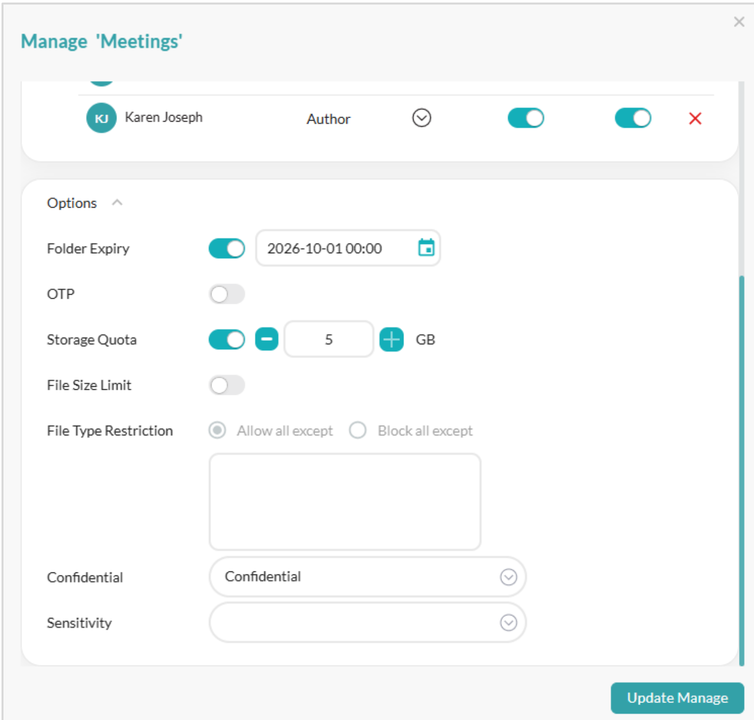
After selecting the recipient/group name, the default permission is Owner. You need to select the right permission and set the right privilege before you click on **Update Manage**.

Permission Type	Description
Reader	Permission to read, download 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

1. The toggle button of **Download** and **Web Edit** can allow you to customise the privilege.
2. E.g: Even though a Contributor, Author may be able to Download file(s) by default, this privilege can be turned off which results in the user being only able to contribute files or read files only.

8.1.5 Customising Options

In some organisations, additional security policies may be imposed by the **administrator** or the **Drive Owner** can decide to set additional criteria when "managing" the folder for collaboration. The options selected applies to everyone (unlike **Share** where some options can be customised by each recipient).

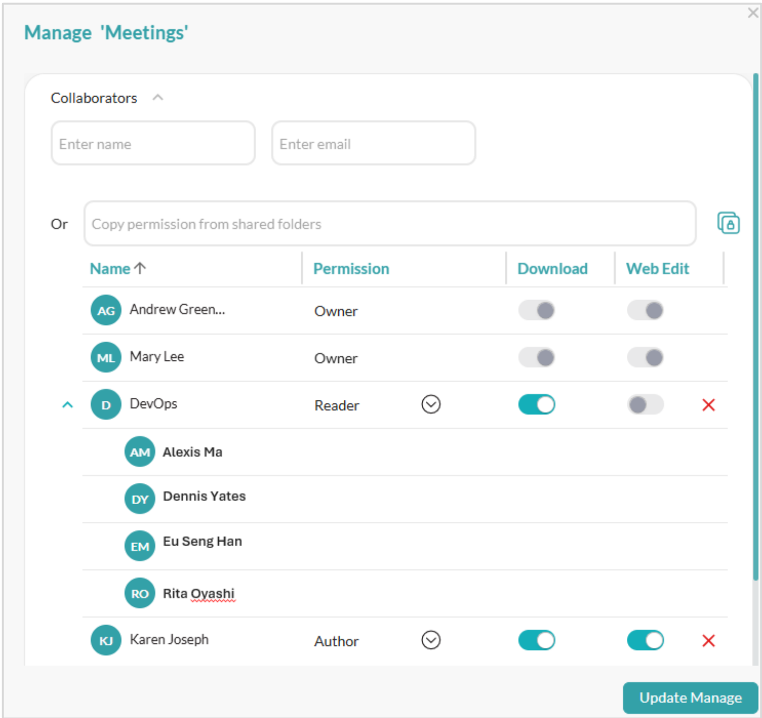


Options	Purpose
Folder expiry	Most projects collaboration may be temporary. It is a good governance to set folder expiry when an owner invites other team mates to collaborate.
OTP	This is only relevant for "external users", or users without EasiShare registered account. The OTP provides additional security to make sure the person accessing the folder goes through an additional verification process since they don't have any username or password to "login".
Storage Quota	If storage space is limited and you want to prevent "overuse", you can set a quota to prevent the space being used up since you may not be able to control all those you've given permission to contribute files.
File Size Limit	Similar to the above, this control may be set on per file level.
File Type Restriction	For better security controls, you may restrict certain file types which are prone to malicious malware from being uploaded.
Document Tag	If tagging is necessary and you may want to set a default tag to those who upload files into this folder,

Note: If you are unable to enable or disable any options, it may be your organisation policy restrictions.

8.1.6 Collaborating with Departments/Group of Users

1. Enter the **group name** and select from the dropdown list. These group name(s) are setup by the EasiShare admin and consist of users who have EasiShare accounts.

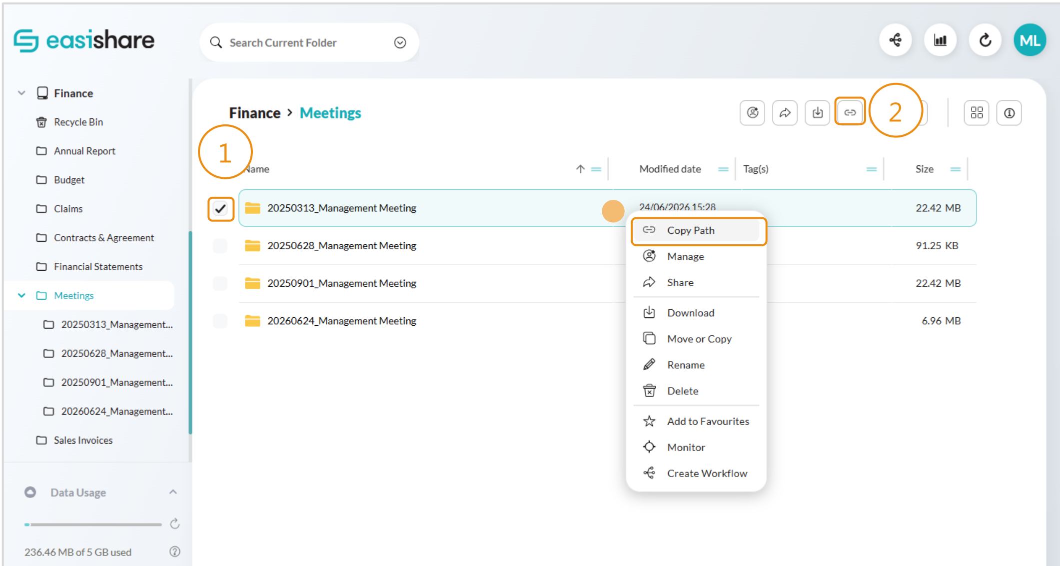


8.2 Views and Access

8.2.1 Copy Path – Sharing links

For a smooth day-to-day collaboration, **sharing a link** on a chat or email is like sharing a shortcut and your team to can get straight into the file/folder location without having to navigate the folders. The **Copy Path** function is only available to "Managed" folders or Common Drives.

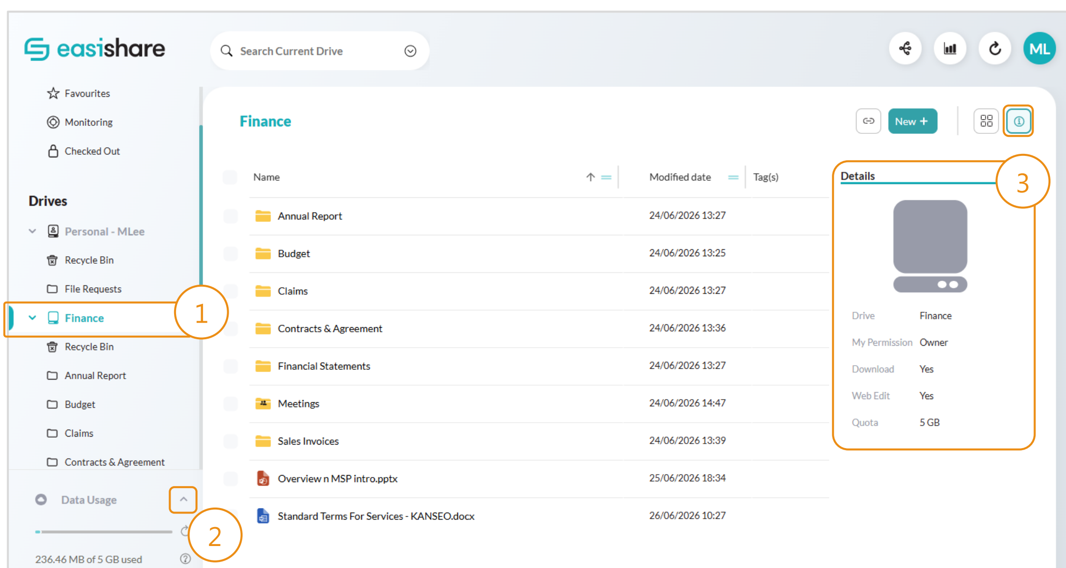
1. Navigate to the file/folder you wish to share with other users who have access to the folder. Select the file/folder.
2. Click on the **Copy Path** icon.
3. Alternatively, right click on the file/folder(s) name and select **Copy Path** from the menu.
4. When you share the link, it will be a hyperlink as a shortcut to the file location. E.g. [20250313_Management Meeting]



Note: Users with links but without permission to the folder(s) will not be allowed to access the file(s).

8.2.2 Owner Shared Drive Information

As a Drive owner, you may occasionally want to check your drive capacity and information.

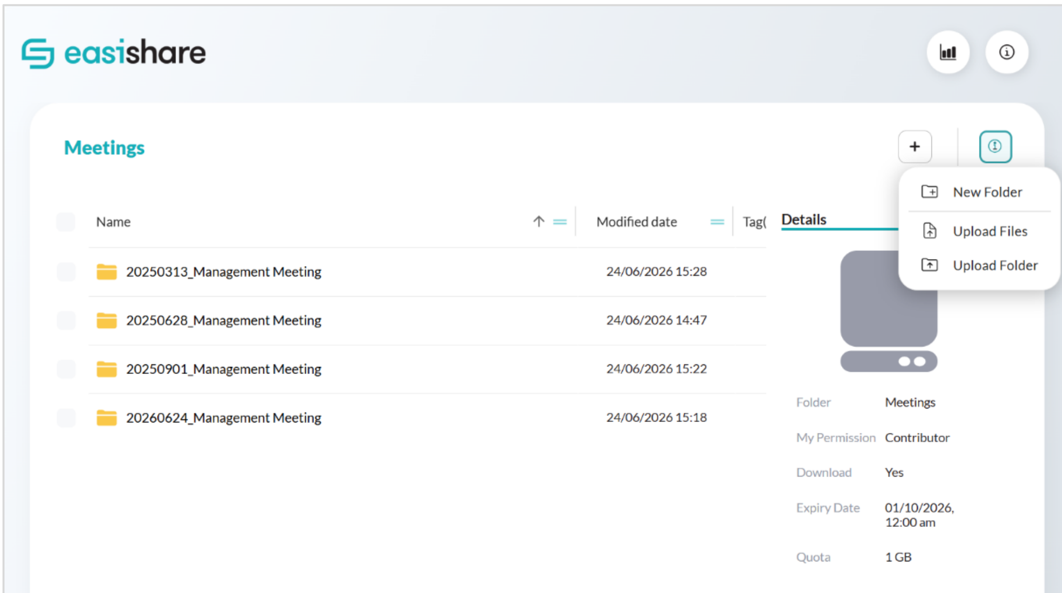


1. Navigate in the **Drives** and click on the Drive name
2. Click on the Arrow icon at the bottom left to display the **Data Usage**.
3. For general information, click on the **Info** icon.

8.2.3 Non-EasiShare User’s View

If the folder is being managed to a user who does not have a registered account with EasiShare, there is no need to login to access the page. The additional security may be the OTP.

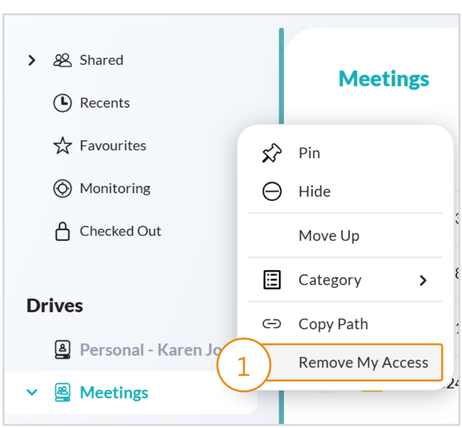
Once the user comes to the folder view, he can perform the actions according to the permissions granted.

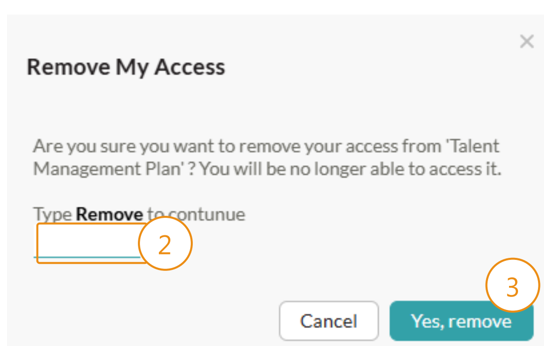


8.2.4 Remove my Access from Shared folder

If you no longer require the access to the Shared folder which another user had given you permission previously, you can remove it from the list on your own.

1. At the **Drives** list, right-click on the Shared folder and select **Remove My Access**.
2. You will be prompted to confirm by typing in **Remove**
3. Click on **“Yes,remove”** button.



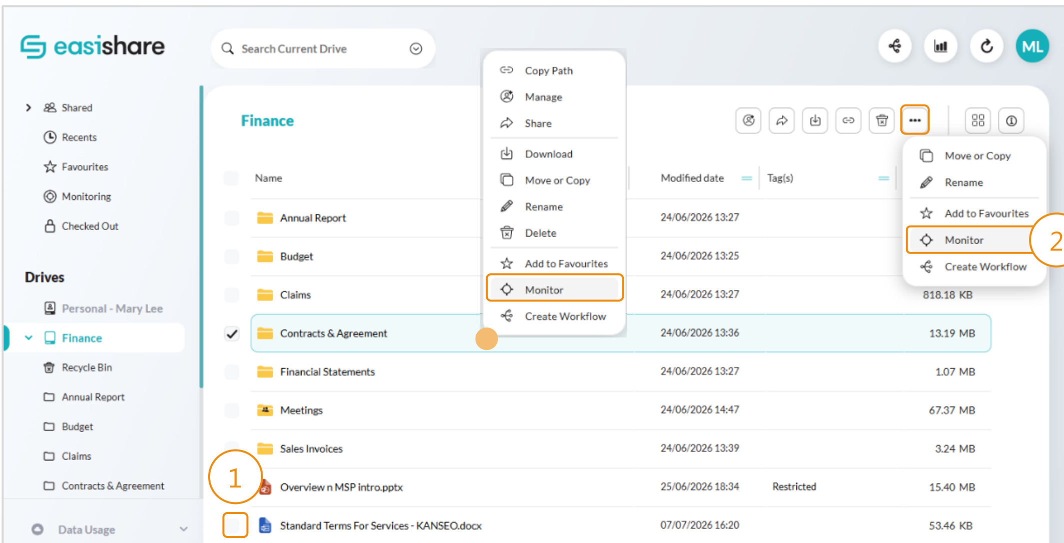


9 Monitor

This **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) including **Shared folders**. You may see different options when you monitor a file or folder.

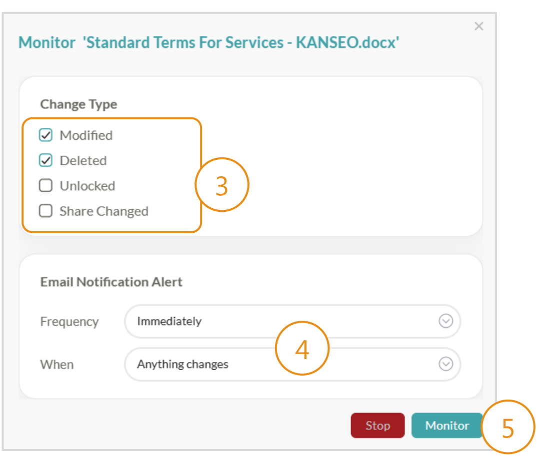
9.1 Monitor a file/folder

1. Select the file/folder you wish to Monitor.
2. Click on **More** ••• icon then select **Monitor** . Alternatively, you can **right-click** on the file you want and select **Monitor** from the menu.

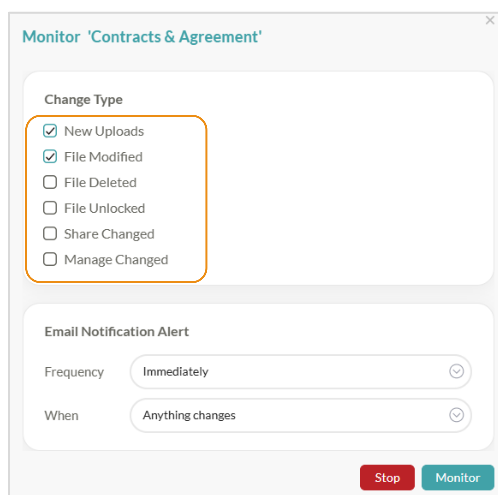


3. In the selection window, choose the **Change Type*** you want to monitor. (Multi-select allowed)

File



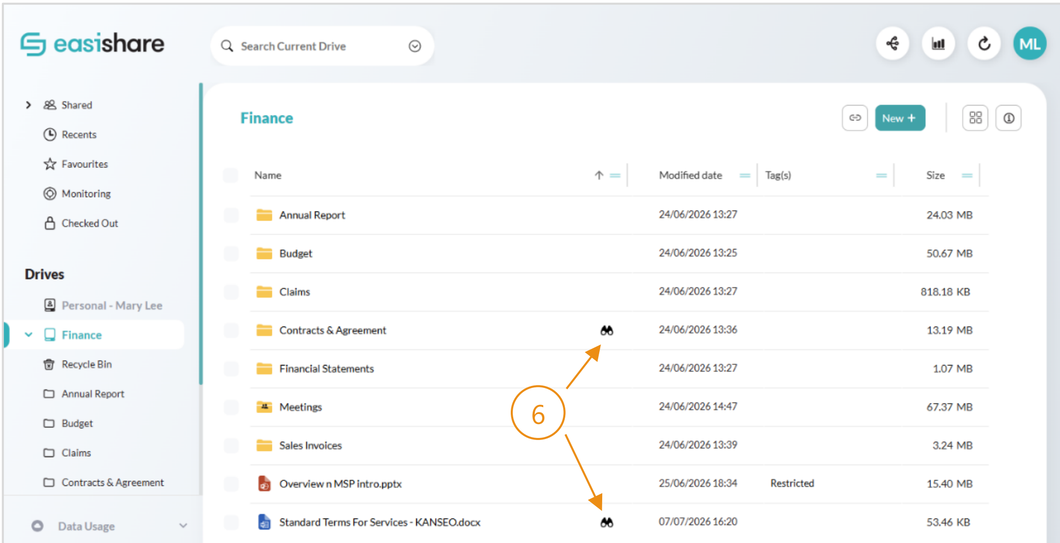
Folder



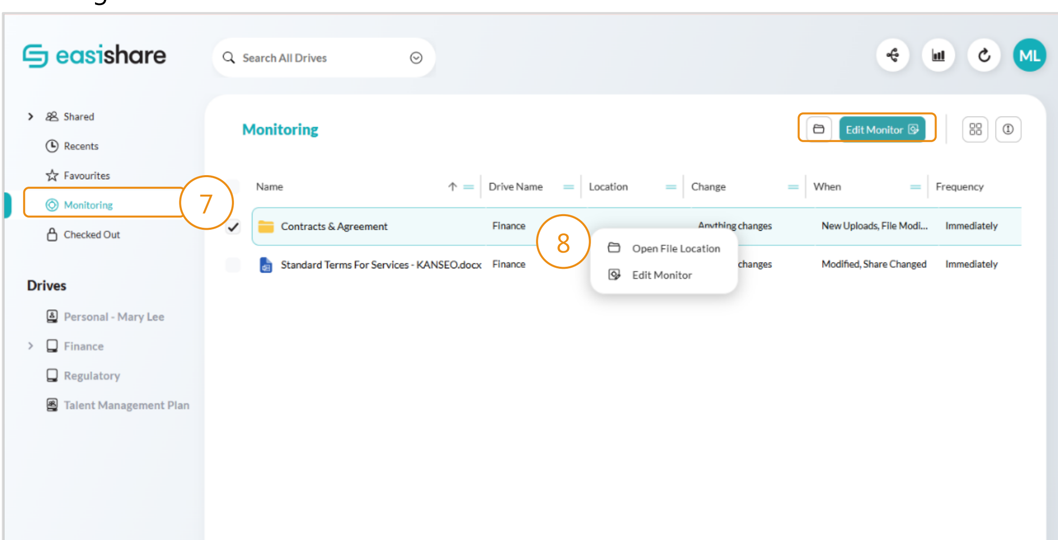
4. Select the **Frequency*** and **When*** (what circumstance) the file is being changed.

5. Click on **Monitor** button.

6. An 🕶 icon will appear on the file that has been monitored.



7. **Shortcut Quick Access:** You can view all the files you have monitored by clicking on **Monitoring** at the left navigation.



8. If you like to view the file, you can select the file and right click to select **Open File Location**.

*Change Type, Frequency & When to be explained in next section.

Note:

1. You can modify your selections or stop monitoring at any time by selecting the file/folder and choose the **Monitor** function in the respective file/folder location or use the **Edit Monitor**.
2. You only have visibility over the file/folder you are monitoring but not what other users are monitoring.

9.2 Options to Monitor

Option	Description
Change Type for File	
Modified	When the file has been overwritten
Deleted	When the file has been deleted
Unlocked	When the file is Discard Check Out or have been Check In
Share Changed	When the file was shared
Change Type for Folder	
New Uploads	When new file has been added to the folder
File Modified	When any file within the folder has been overwritten
File Deleted	When any file within the folder has been deleted
File Unlocked	When any file within the folder has been unlocked
Share Changed	When any files within the folder was shared
Manage Changed	When the folder permission has been updated by other owner(s)
Frequency	To control when you will receive an email notification • Immediately • Daily (Default: 9AM) • Weekly (Default: Monday at 9AM)
When	Available selection: • Anything changes • Someone else made changes • Any changes to a document created by me • Someone else made changes to a document created by me • Someone else changes to a document last modified by me

9.3 Stop Monitoring

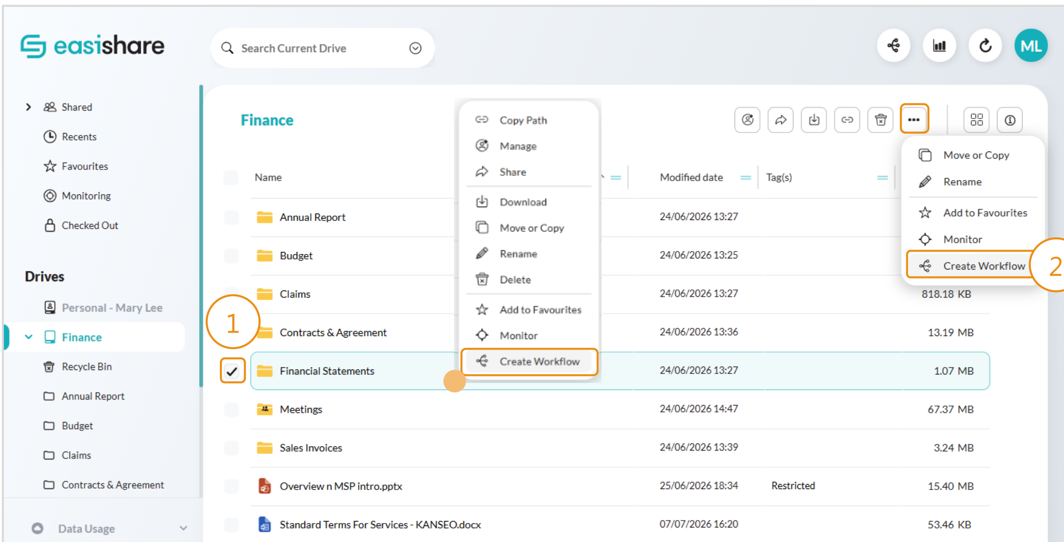
1. Select the file/folder that you wish to stop Monitoring.
2. Click on More ••• icon then select **Monitor** . Alternatively, you can right-click on the file you want and select **Monitor** from the menu.
3. Click on **Stop** button Stop.
4. The icon will be removed from the view.

10 Workflow

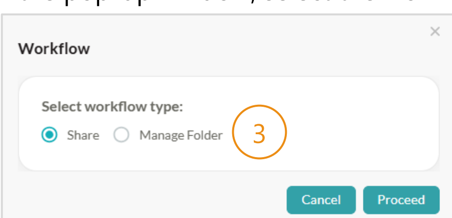
This is useful in an organisation that requires sharing requests of certain documents to reviewed. A workflow can be initiated by the Owner of the drive. By setting a workflow, you are preventing any file/folder to be shared without seeking permission from one (or many) of the owners.

10.1 Owner Creates Workflow

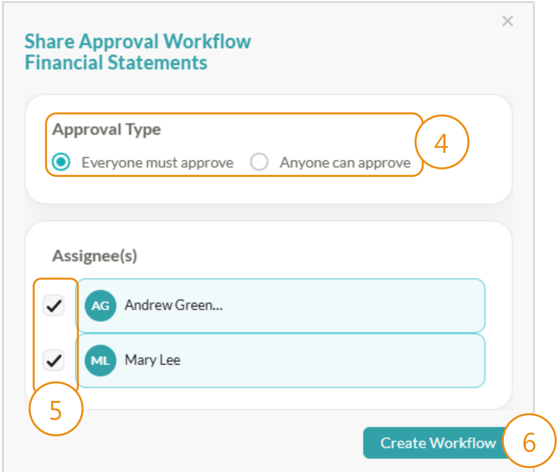
1. Select the file/folder you wish to create a workflow.
2. Click on **More** icon then select **Create Workflow**. Alternatively, you can **right-click** on the file you want and select **Create Workflow** from the menu.



3. In the pop-up window, select the workflow type (if folder is being selected) and click **Proceed**.



4. Select "**All must approve**" or "**Anyone can approve**".
5. Select the **Assignee name(s).**
6. Click on **Create Workflow** button.

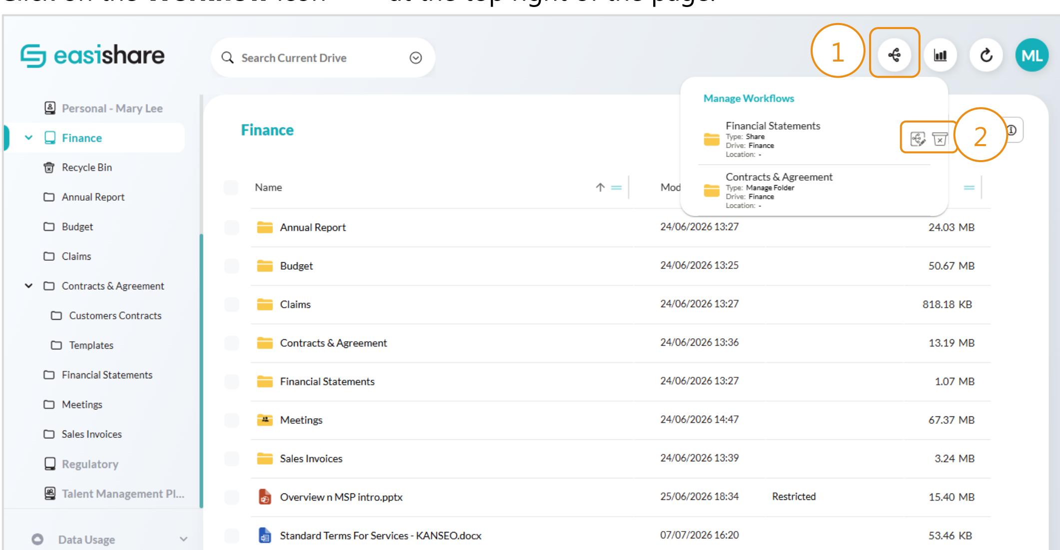


10.2 Owner Edits Workflow

1. Select the file/folder you wish to edit a workflow.
2. Click on **More** icon then select **Edit Workflow**. Alternatively, you can **right-click** on the file you want and select **Edit Workflow** from the menu.
3. Another way is to click on the **Workflow** icon at the top right of the page. Hover on the right side of the file/folder name and you will see the Edit Workflow & Delete icon. Click on **Edit Workflow**.
4. Repeat the same steps as "Create Workflow".

10.3 Delete Workflow

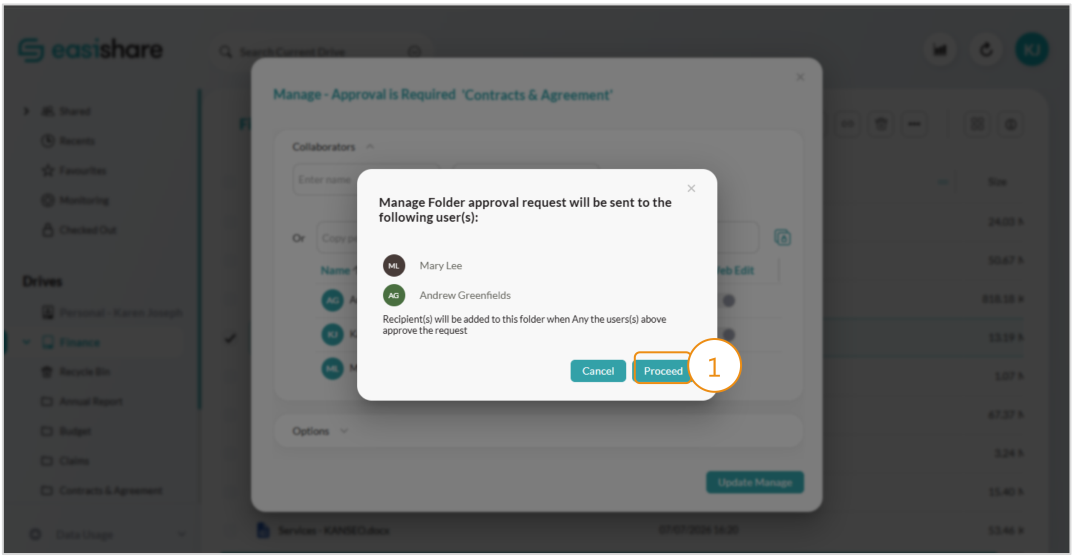
1. Click on the **Workflow** icon at the top right of the page.



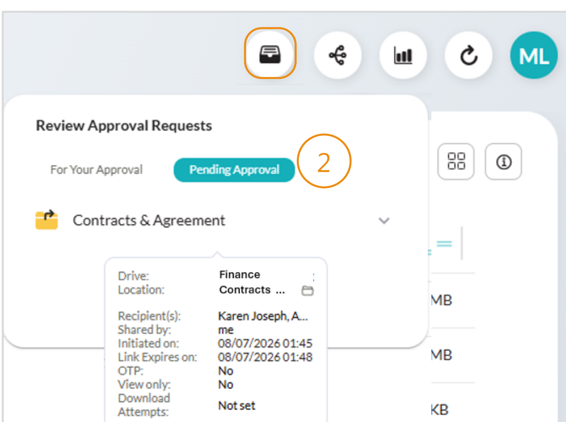
2. A list of workflow will be displayed, hover on the right side of the file/folder name and you will see the Edit Workflow & Delete icon.
3. Click on the **Delete** icon.

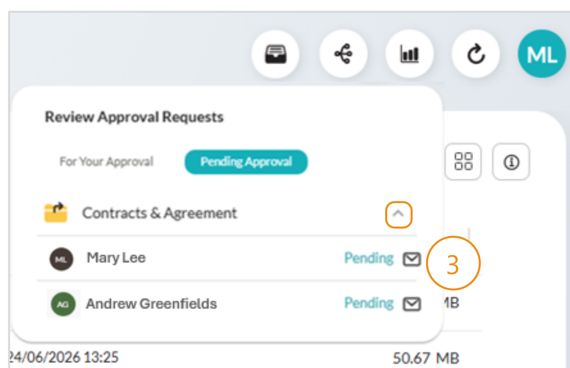
10.4 User Checks Pending Approvals and Remind Approvers

1. User shares or manage a file/folder. A window will remind the user that an approval request will be sent before they can **Proceed**.
2. Refer to Initiating a Share & Manage Folder to complete the steps to Share/Manage folder.



3. To check on workflow items pending for approval, click on **Review Approval Requests** icon at the top right then click on **Pending Approval**.

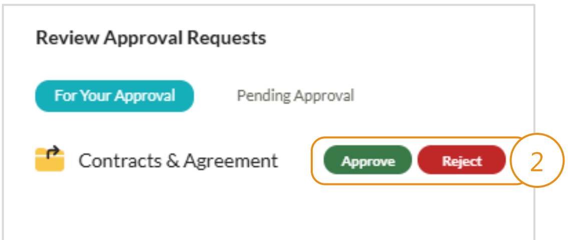




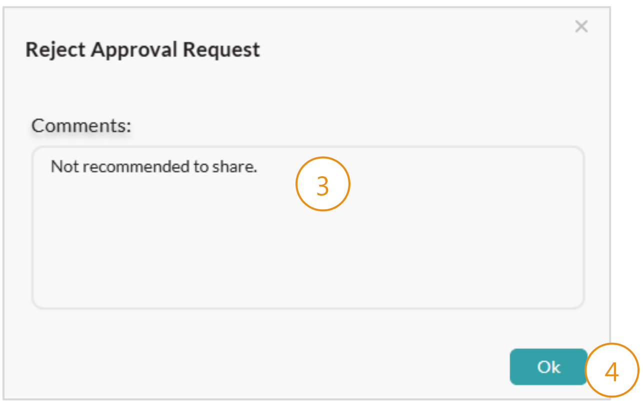
4. To send a reminder, click on the **arrow** then click on the **email** icon.

10.5 Approvers Approve or Reject with Comments

1. To review a Share Request, navigate to **Review Approval Requests** icon at the top right then click on **For Your Approval**.
2. Select **Approve** or **Reject.**



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



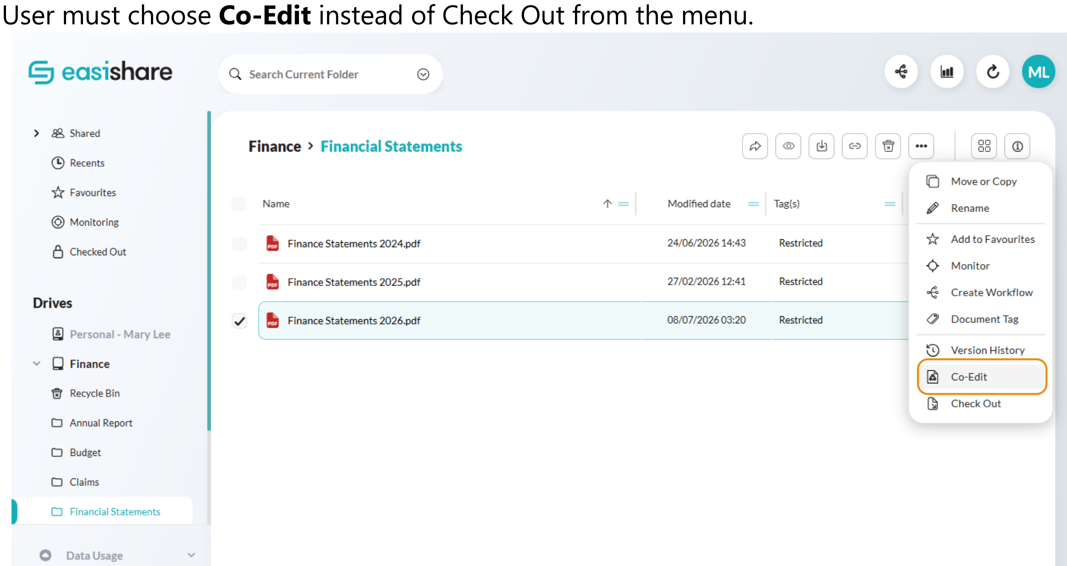
11 Online Editing

Note: This feature is only available if your organisation has OnlyOffice license.

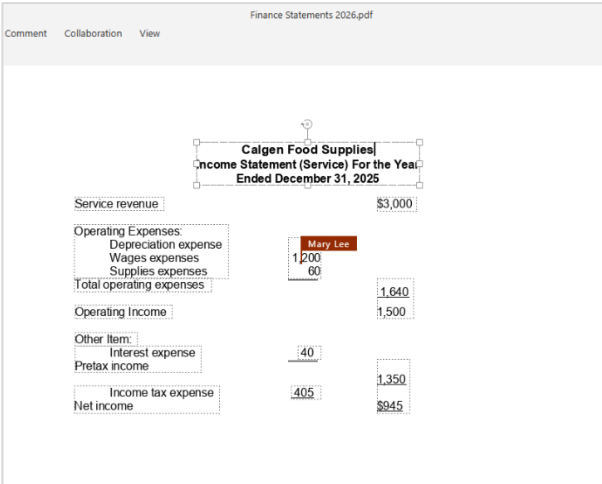
When you click on the file name, it will launch a separate browser window with the Office Editor. The editor supports **Word, Excel, PowerPoint** and **PDF** document editing.

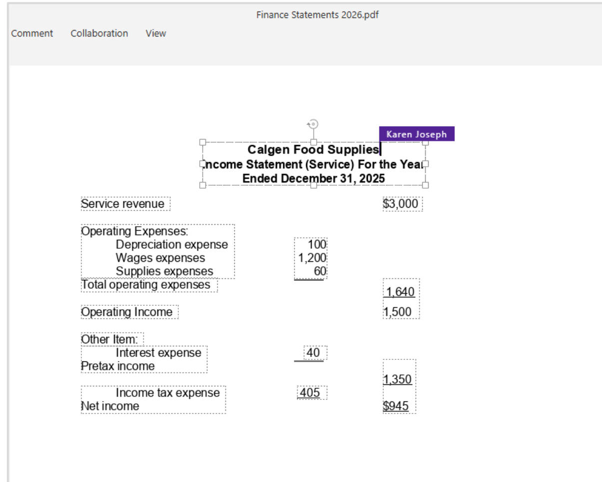
To co-edit:

1. User must choose **Co-Edit** instead of Check Out from the menu.

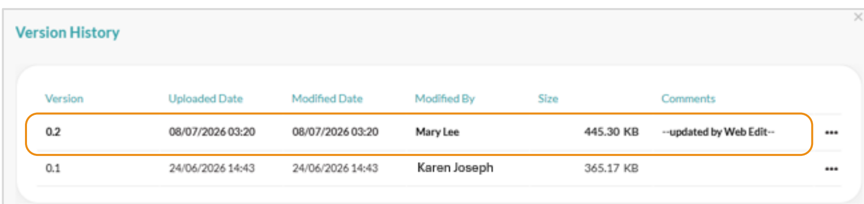


2. The subsequent user must also choose Co-Edit to edit on the file.





3. When editing & saving is completed, the first user who initiates the co-edit action will be recorded in the Version History upon saving the edited file. Under the comments, there will be an indication that the updates is performed by Web Edit.



Version History

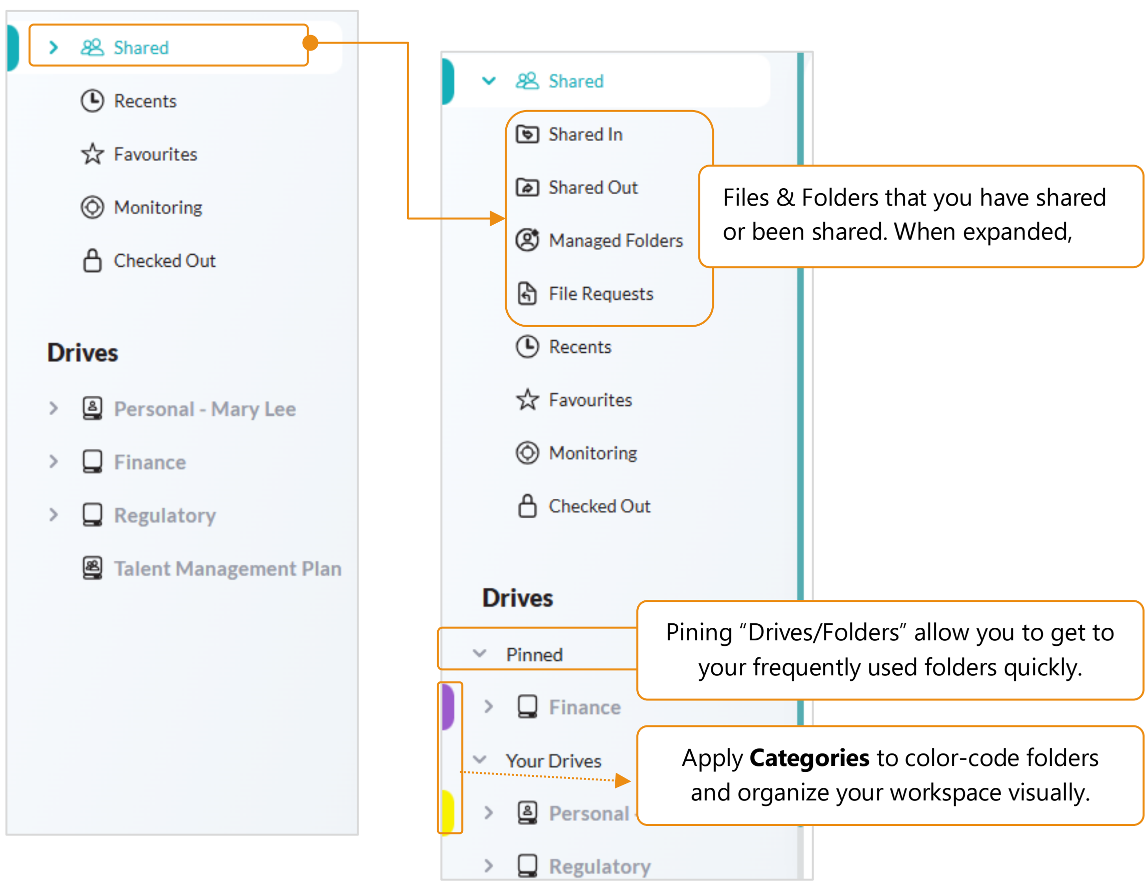
Version	Uploaded Date	Modified Date	Modified By	Size	Comments
0.2	08/07/2026 03:20	08/07/2026 03:20	Mary Lee	445.30 KB	--updated by Web Edit--
0.1	24/06/2026 14:43	24/06/2026 14:43	Karen Joseph	365.17 KB	

12 Customising User Experience

12.1 Shortcuts

There are various shortcuts to get to your most **Recent** used files, **Favourites**, **Monitored, Checked Out or Shared files**, etc. This section elaborates some of the shortcuts to save you time from having to click through nested files and folders to find the same content.

From This View **To This View**



12.1.1 Shared

Refer to the various sections under Share, File Request, Manage Folder on how to perform the actions.

If you have shared files or folders, navigate to these sections to view activity details or **manage access** permissions (such as editing or revoking access). Additionally, you can use the **Open File Location** shortcut to jump directly to the original source location of any shared item.

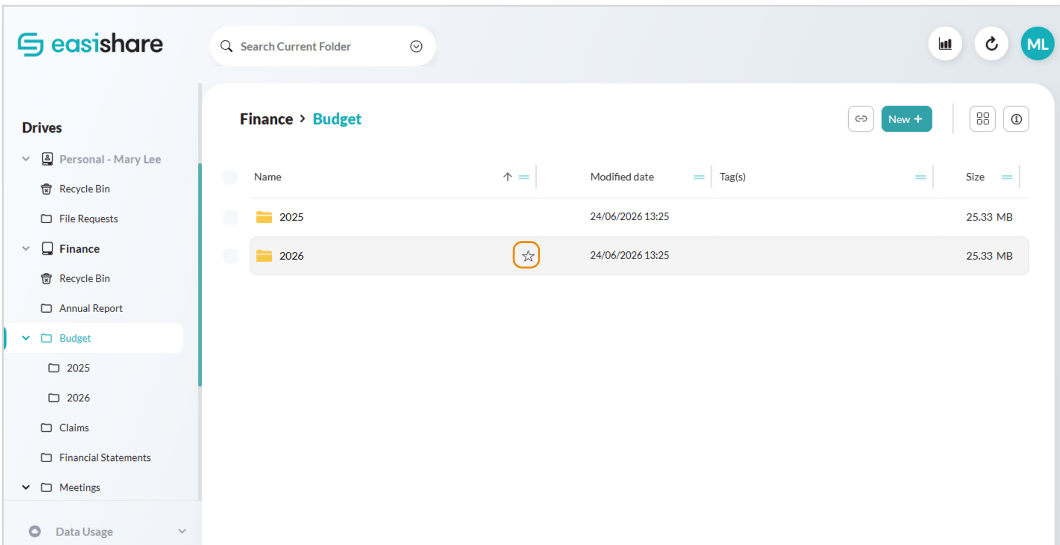
12.1.2 Recents

Recently accessed files can be found in **Recents**. You can **Preview**, **Open File Location** or **Delete** the file directly from this view.

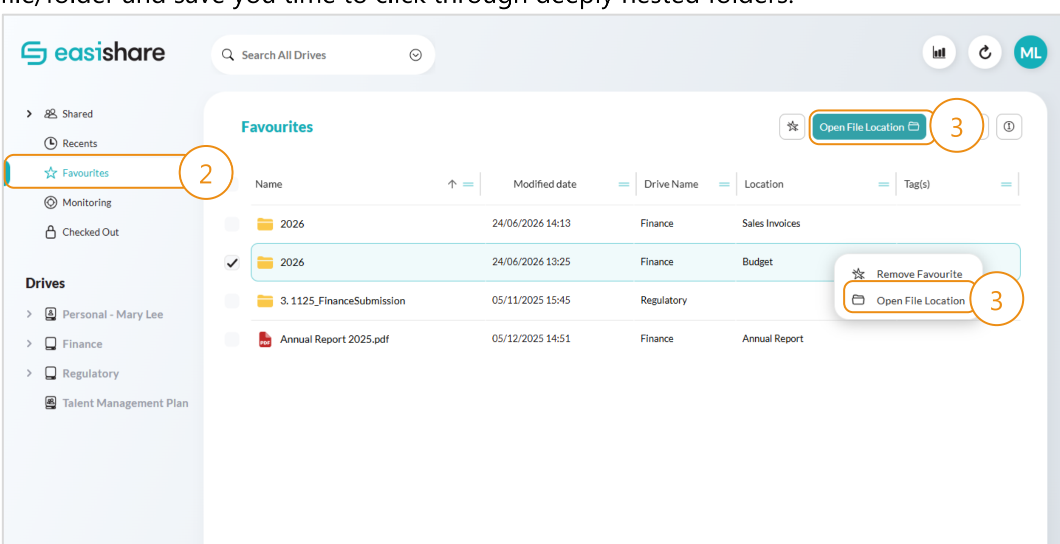
12.1.3 Favourites

Locating frequently accessed and deeply nested files and folders can be time consuming. It is made easier by putting them on favourites.

1. Go to the file/folder name and hover near the end of the column and a star ☆ icon will appear. Click on it and a filled icon ★ will indicate it has been added to the Favourites.



2. When you navigate to the **Favourites folder**, you can view a list of files/folders that are residing in different folder locations.
3. You can select the file/folder name and click on **Open File Location** to bring you quickly to the file/folder and save you time to click through deeply nested folders.



4. To **Remove Favourite**: In the **Favourites folder**, select the file/folder name and click on the **Remove Favourite** icon. In the file location, click the filled ★ icon again to remove it.

12.1.4 Monitoring

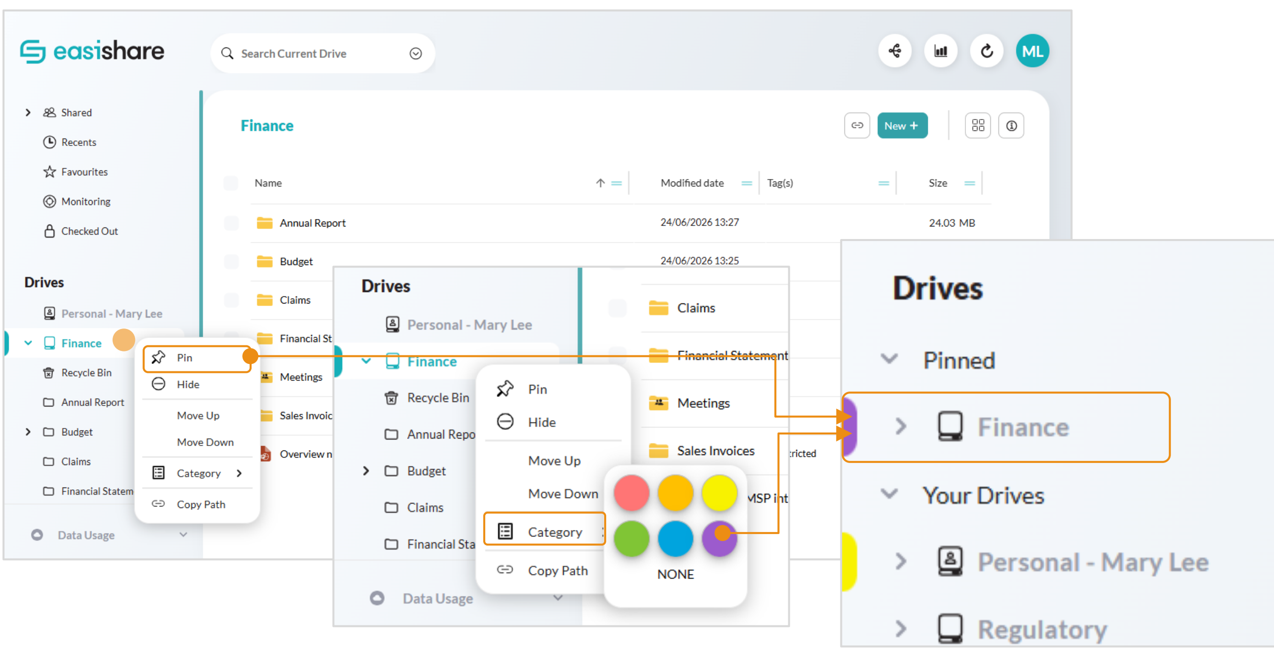
Refer to the Monitor section on how to set up file/folder monitoring. This **Monitor** shortcut allows you to track and housekeep your monitored files. From here, you can update your monitored list, remove items, or use Open File Location to jump directly to a file's source folder.

12.1.5 Checked Out

Refer to the Versions Control section on how files are checked out. This **Checked Out** shortcut allows you to track all the files currently checked out by you. Use this space to review your active files and clean up your workspace. From here, you can **Check In**, **Discard Check Out**, or use **Open File Location** to jump directly to the source folder.

12.2 Organising and Prioritising Drives & Folders

If you have multiple Common Drives and Shared Folders, the list can become overwhelming. You can use organise and prioritise your folders by **Pin**, **Hide**, or moving them up and down**.** You can assign **Categories** to colour-code them for quick recognition.

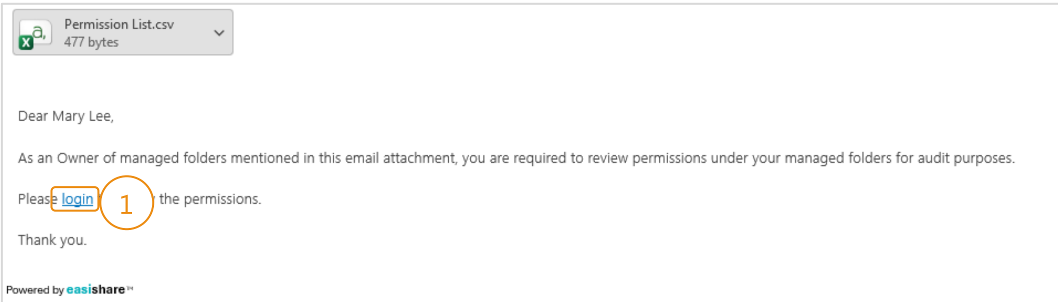


1. Right-click on the Drive/Folder name “Finance”.
2. The **Finance** drive gets moved into the “**Pinned**” section.
3. Right-click on the Drive/Folder name.
4. Select **Category** and choose the **color**.

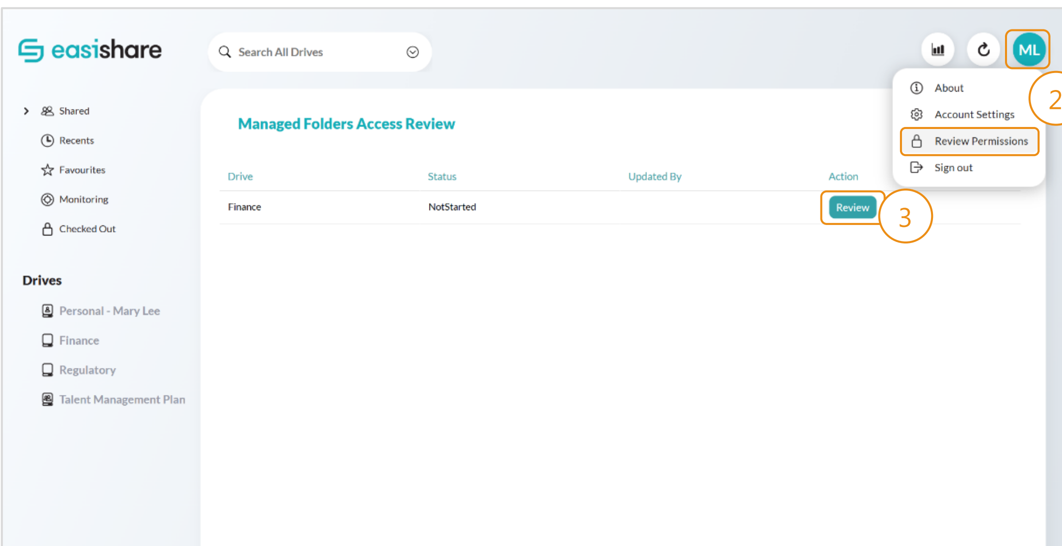
13 Access Review (for Drive Owners)

In the section of Manage Folder, owners can invite other users to collaborate in their folders. To maintain strong data governance and security, system administrators periodically initiate an **Access Review** to clean up outdated folder permissions.

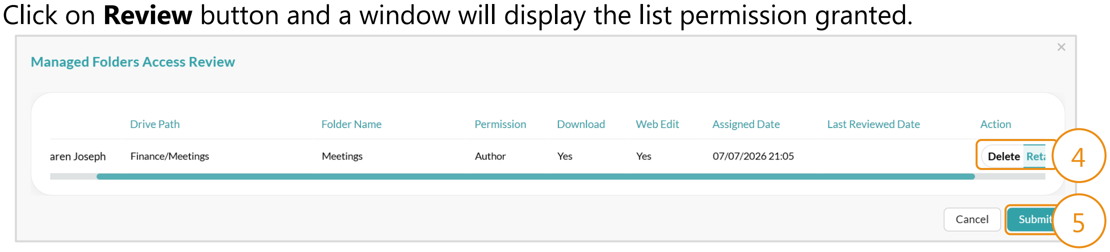
1. When a review is required, folder owners will receive an email notification.



2. Using the link in the email, the user can come straight to the **Managed Folders Access Review** page or click on name and select **Review Permissions**.



3. Click on **Review** button and a window will display the list permission granted.



4. Scroll to the right and select either **Retain** or **Delete**, then click on **Submit** button