kiteworks™
by Accellion

Web User's Guide

May 2016

Corporate Headquarters

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Preface

Welcome

At Accellion, enterprise security is our primary focus. Second is our commitment to business mobility. Whether you are sharing files within your organization, or collaborating with multiple teams across the globe, we are committed to providing you with the definitive platform for working with content securely. Welcome to **kite**works™.

The **kite**works solution gives you powerful and secure access to content wherever you are, so you can share with confidence. With **kite**works, you can work seamlessly from web browser, to desktop, to tablet and smartphone—and you are always connected to your files.

Audience

This documentation is intended for users of the **kite**works solution by Accellion.

What's New

Each release of the documentation tracks with the current version of the software.

kiteworks Update 2: April 2016

- Microsoft Office Web Application (OWA) Integration

kiteworks Update 1: March 2016

- Desktop office integration with kiteworks Web implemented: allows users to use desktop installed Microsoft Office applications to open, edit, and save files from kiteworks Web.
- User Onboarding improved: simplified onboarding process, account/password recovery made easier.
- Mobile Push functionality enhanced.
- Manage Legal Content EC added: compatible with iManage.

kiteworks Update 5: December 2015

- Restricted Folders: A Folder Manager can now set a folder as Restricted. Users cannot download, copy, or send files from the restricted folder, nor sync the restricted folder using the desktop client. Users can view files using the online viewer. Collaborators can use the Mobile Editor or Secure kiteworks Web Editor to edit files in a restricted folder, as well as annotate PDF files. When the user saves the edited file, the file is saved as a new version on the kiteworks server, not on their computer or device. Restricted folders also prevent SFTP downloads.
- Soft delete of nested folders is now available to users with collaborator privileges.
- Pagination: A folder containing thousands of files took a long time to scroll through, but the new paging mechanism in this release makes such a folder easy to work with.
- Navigation Panel: The main navigation panel on the web interface can now be collapsed to provide more room on the screen.

kiteworks Update 4: September 2015

- For large file uploads, modern browsers that support HTML5 (Internet Explorer 10+, Chrome 11+, Firefox 4+, Safari 6+) do not display the Java applet option on the upload pop-up window as large file uploads do not require use of the Java applet on modern browsers. Older browsers continue to display the Java applet option on the file upload pop-up window.
- For folder uploads, Google Chrome does not display the Java applet option on the folder upload pop-up window as it natively supports folder uploads. Other browsers continue to display the Java applet option on the folder upload pop-up window.
- For folder and large file downloads and e-mail, neither older nor modern browsers will display the Java applet option on the download pop-up window or the e-mail options menu since folder and large file download and transfer no longer require use of the Java applet.

kiteworks Update 3: July 2015

- You can now drag and drop files directly between kiteworks folders
- New mail view.
- Folder Upload is now listed in the Activity Stream.
- Users can now upload an entire folder structure via web applet.
- Folders can be sent as a zip file for sharing.
- Mobile sync/push makes a file available on all devices for offline viewing.
- Ability to generate or add SFTP key pairs.

kiteworks Update 2: May 2015

- Updated the User Interface with the following improvements; refer to Get Oriented: A Guided Tour:
  - Moved the main buttons to the left and added labels for easier navigation.
  - Lightened the background for improved readability.
  - Toggle button to switch between List view and Detail view for increased productivity.
  - Added icons next to the actions in the dropdown menus for easier recognition.

kiteworks Update 1: April 2015

- Enhanced the Request a File feature to allow files within the folder to be viewable to all users.
- Added mail to the Enhanced Search feature.
- Added the ability to Change File Expiration Date of a file.
- Added OpenText eDOCS DM to the available EC connectors.
- Administrative enhancements to the *kiteworks Web User's Guide.*

Using kiteworks

What is kiteworks?

kiteworks™ is a secure file-sharing solution from Accellion that enables you to securely and easily access and share enterprise information any time, anywhere. You can access your files and folders in the office and on the go, and can be sure that your files are up-to-date and protected. **kite**works gives you powerful and secure access to content wherever you are, so you can share with confidence.

The concepts discussed here can also be applied to your mobile device. For more information about the mobile app, Go Mobile.

Supported Browsers

The **kite**works interface supports the following browsers:

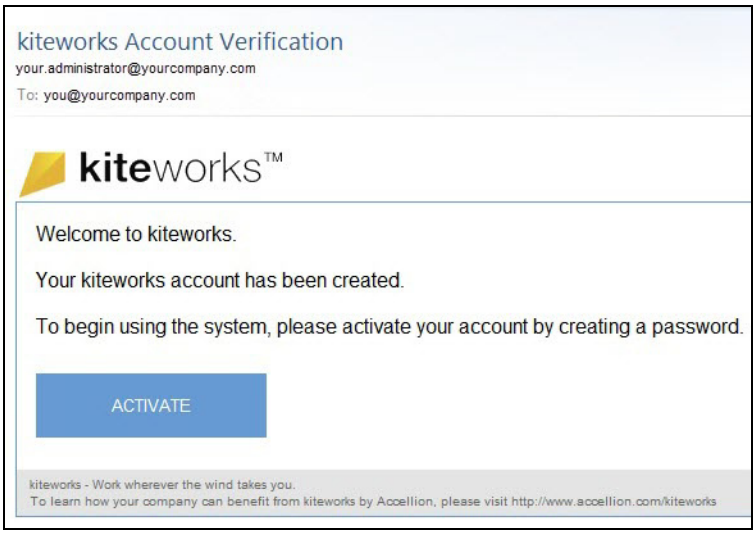
Table 1. Supported Browsers

Browser	Version and Notes
Internet Explorer	IE 9.0 and up **Note** Drag & Drop and multiple file select are not supported in IE9 because of the limited HTML 5 support in IE9. Accellion recommends using IE 10.0 and up.
Firefox	Firefox 26 and up
Chrome	Chrome 31 and up
Safari	Safari 5.1.10 and up **Note** Some default settings in Safari may need to be changed for the Java applet to function properly. Refer to Troubleshooting for more information.

The Java applet supports Java 6 update 31 and up.

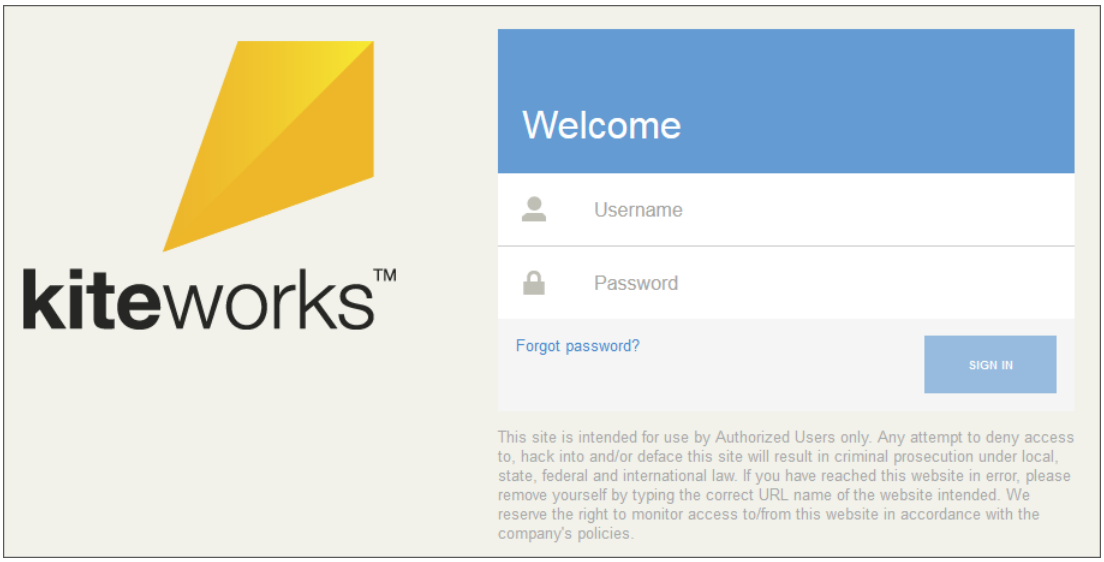
Sign In

You receive an email as below from your Administrator, indicating that your **kite**works account has been created. Click **Activate**, and you are taken to the **kite**works URL, where you can sign in.



The following screen appears.

Note Bookmark this page for future reference; this is your access point to **kite**works.

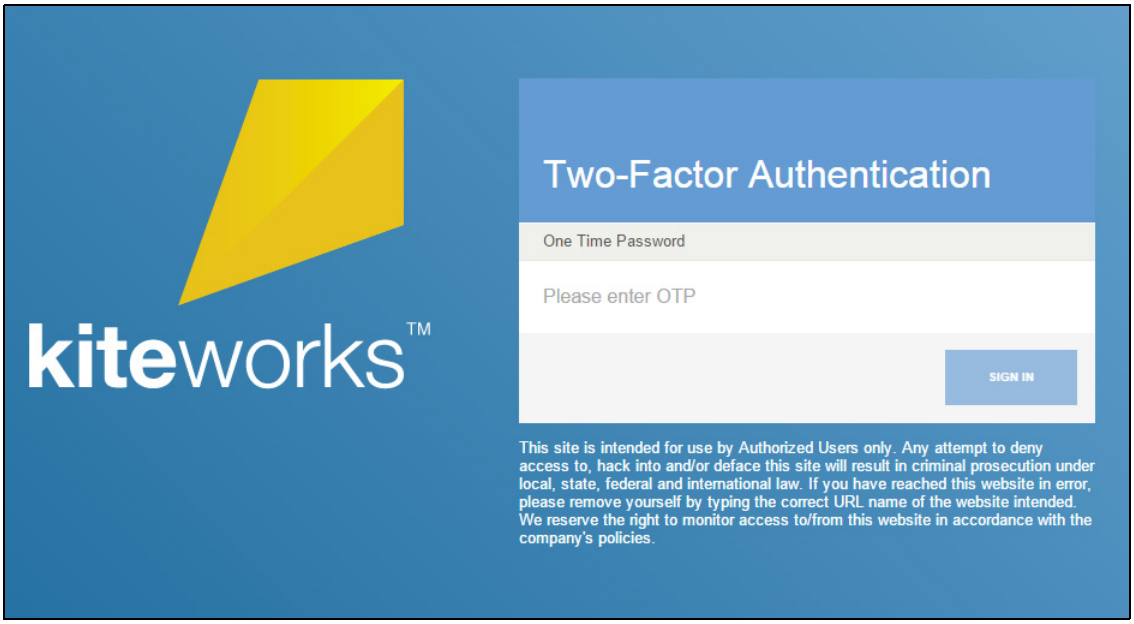


Add your user name (your email address) and password. If you haven't logged in before and this option is available, click **I don't have an account yet**. You will be prompted to create a password.

If you have forgotten your password, click **Forgot password**, and your Administrator will process your request, usually by sending you a new activation link.

Two-Factor Authentication

Two-Factor Authentication (2FA) is a license-enabled feature that requires an additional security step when users log in to **kite**works. 2FA enhances the regular authentication by adding a “possession factor” (something the user *has*, such as a token, SMS-based phone or device, or email connection) with a “knowledge factor” (something the user *knows*, such as a password) into the authentication process.

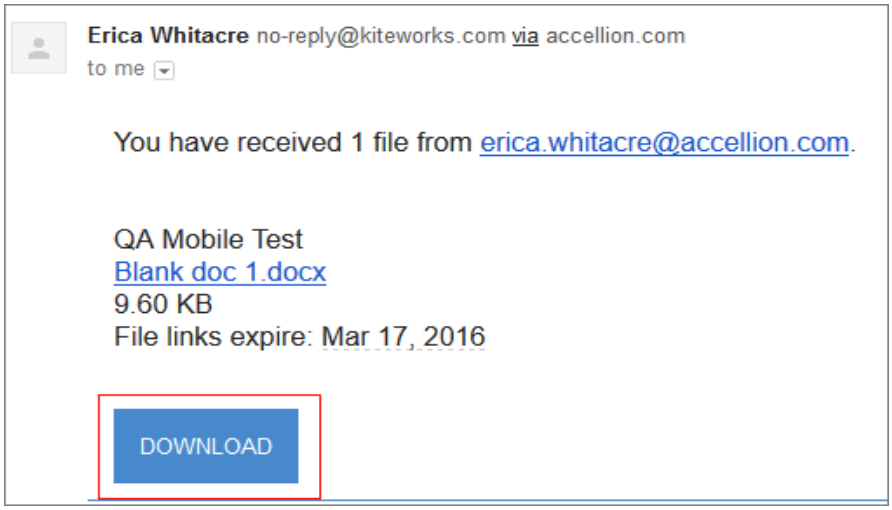


User Onboarding Email

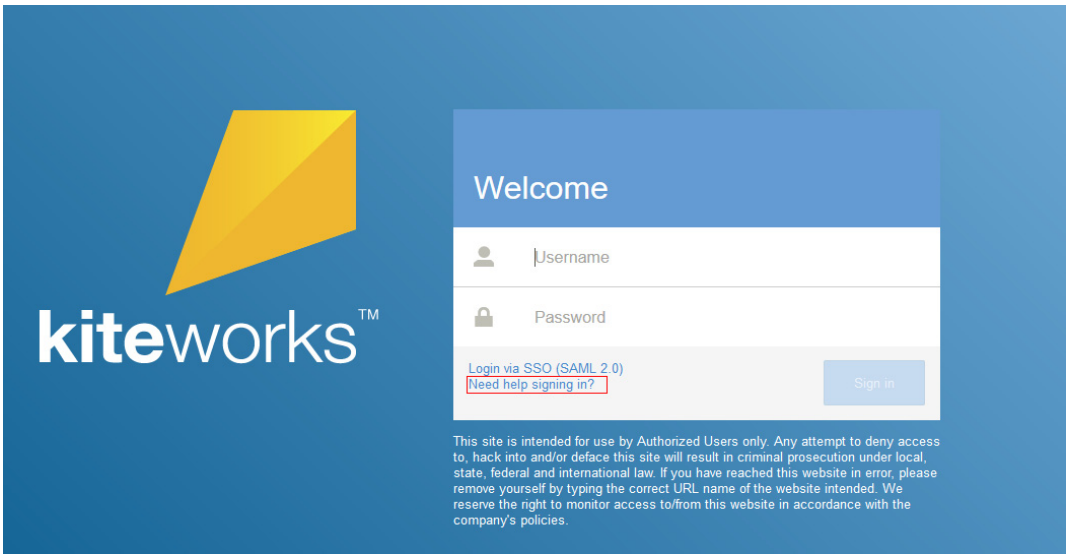
It is possible for new users to receive **kite**works files as well. You, as a new user, may need to set a password and register your account before you can log in and access them.

Below is a step-by-step process of receiving such files.

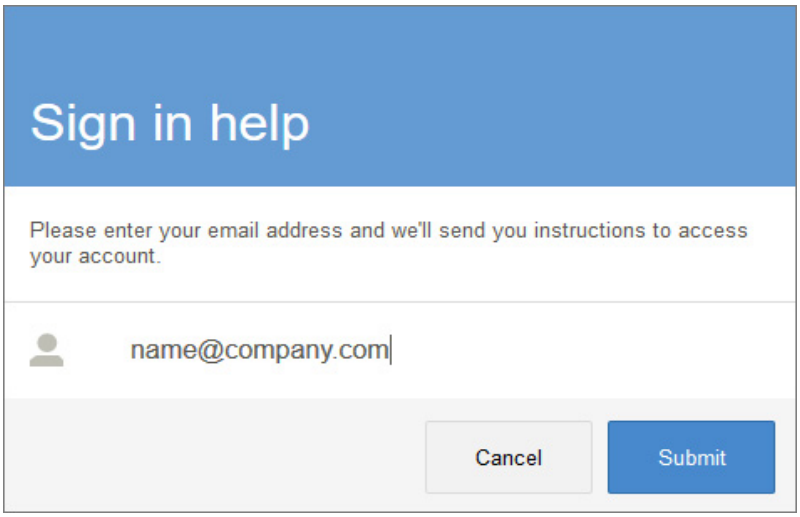
You will receive an email with a download link.



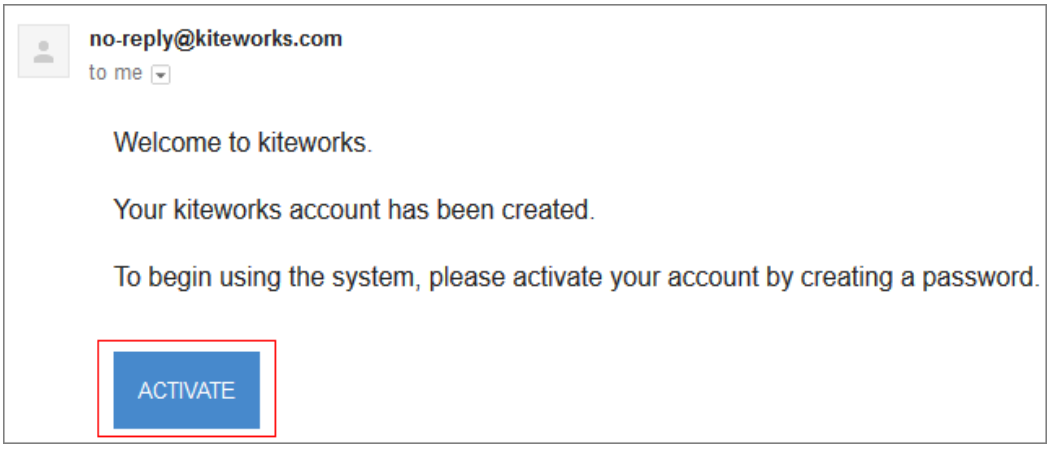
Upon clicking Download, you will be redirected to the login page. Since you are a new user and don't have **kite**works credentials, click the *"Need help signing in?"* link.



You will be prompted to enter your email address to receive further instructions on how to proceed.



You will then receive an email with directions, based on your account status. Click Activate.

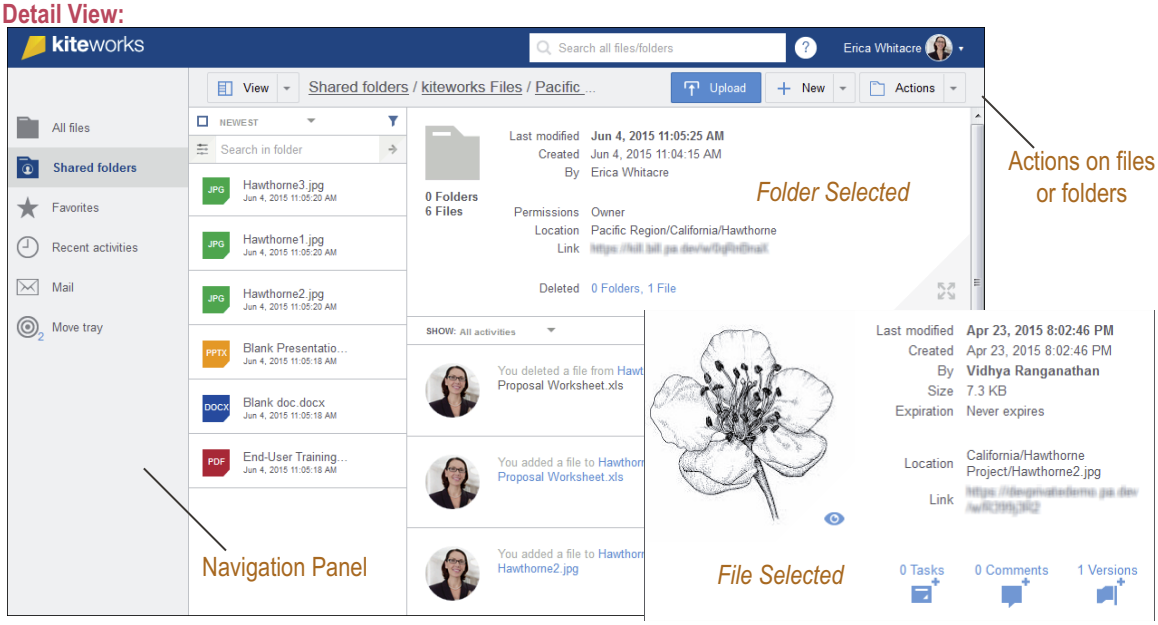


After you've activated your account, you will be automatically redirected to the file that was originally sent to you for download.

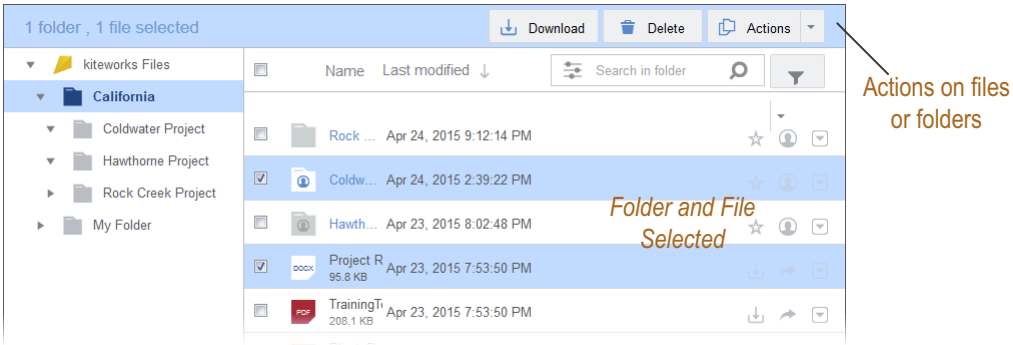
Get Oriented: A Guided Tour

The **kite**works web interface is made up of a navigation pane at the left of the screen that governs all view. There are two views available: *detail* and *list*.

Detail View:



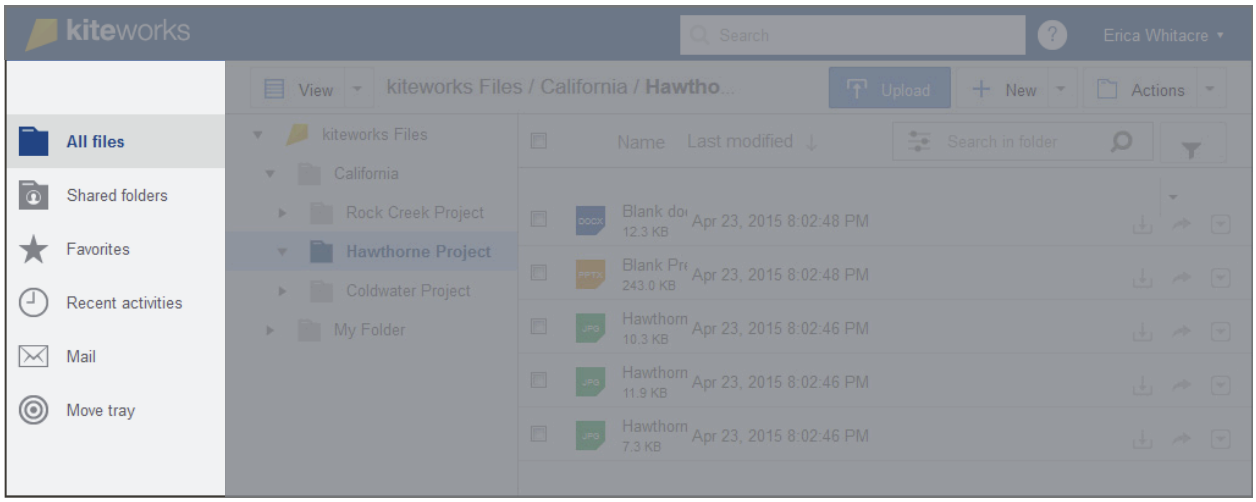
List View:



- The Navigation Pane: Getting Around in kiteworks
- Where You Work
- Recent Activities View: Track Your Work

The Navigation Pane: Getting Around in kiteworks

At the left of the screen is a navigation pane from which you can perform high-level functions and navigate through your views of **kite**works.



The icons are described in the following table.

Table 2. Top Menu Icons

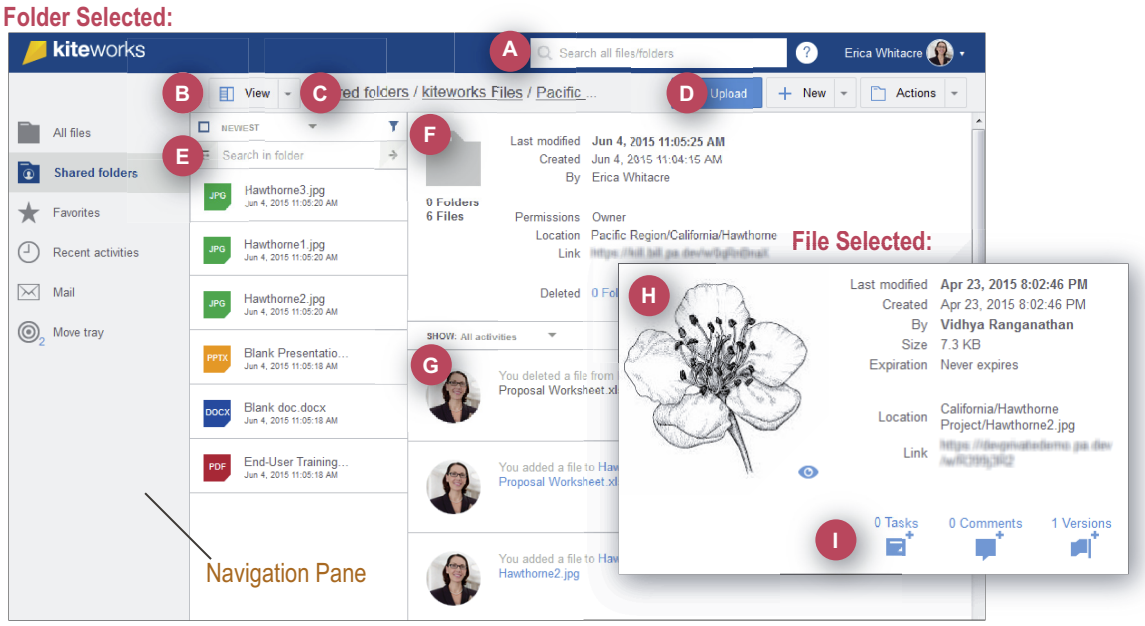
Button (selected)	Description	Notes
	All files	Lists all the folders to which you have access. For more information, refer to Where You Work.
	Shared folders	Filters the list of folders to those you have shared with other users or folders that have been shared with you. The view is identical to the detail view, with unshared folders filtered out of the list. For more information, refer to Detail View: Explore Your Files and Folders and Share Access to a Folder.
	Favorites	Filters the list of folders to those you have marked as a favorite. The view is identical to the detail view, but shows only the folders you have marked as favorites. For more information, refer to Detail View: Explore Your Files and Folders and Make a Folder a Favorite.
	Recent activities	Jumps to the Activity view for managing tasks, comments, and other activities. For more information, refer to Recent Activities View: Track Your Work.
	Mail	Opens the Email Files window. For more information, refer to Email a File.
	Move tray	Opens the Move Tray panel. For more information, refer to The Move Tray.

Where You Work

You have two options of how to best perform the actions you wish on your files and folders. To be able to see and perform actions on each item individually, use the detail view (Detail View: Explore Your Files and Folders). To see and perform actions on folders and files in the context of the file and folder structure in **kite**works, use the list view (List View: Manage Your Files and Folders).

Detail View: Explore Your Files and Folders

The detail view is your default view, accessed by clicking the view icon. The detail view shows the folders and files to which you have access, as well as details about each file and folder.



The specific sections of this screen are described in the following table.

Table 3. Detail View

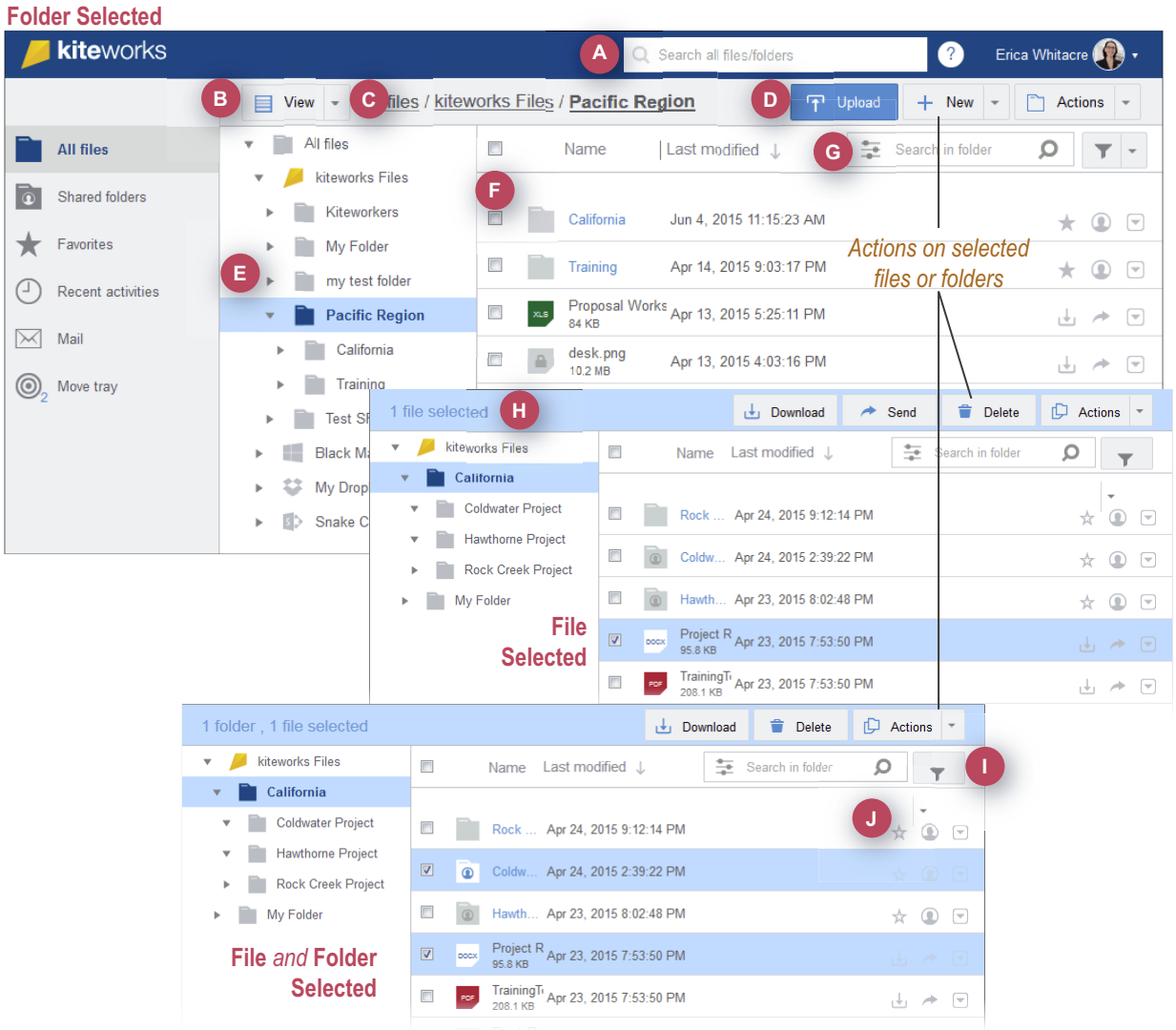
Identifier	Description	Notes
A	Search, Help, Settings	Use the banner bar for performing Search Functions, accessing the Help, and how to Edit Settings for your account.
B	List view	Allows you to toggle the view to the list view. Refer to List View: Manage Your Files and Folders.
C	Path to folder structure	Shows how deeply into the folder structure the current folder resides. You can click each level to navigate through the file structure.
D	Actions	Allows you to perform actions on selected files and folders, including uploading new files, adding new folders, requesting files, and other actions specific to the selected file or folder.
E	Contents of selected folder	Shows all contents of the current folder.
F	Folder details	Shows information about the selected folder, including your role in that folder. For more information about the folder, click the “expand” button ( ).

Table 3. Detail View

Identifier	Description	Notes
G	Activities related to the folder	Includes information about invitations, file uploads, locked/unlocked files, etc.
H	Thumbnail of the file	Shows a thumbnail of supported file types. To view the file without downloading the file, click the "eye" button ( ).
I	File collaboration buttons	Shows you Tasks, Comments, and Versions relating to the selected file.

List View: Manage Your Files and Folders

The list view, accessed by clicking the View button, shows you information about how to manage your files and folders within a navigational structure.



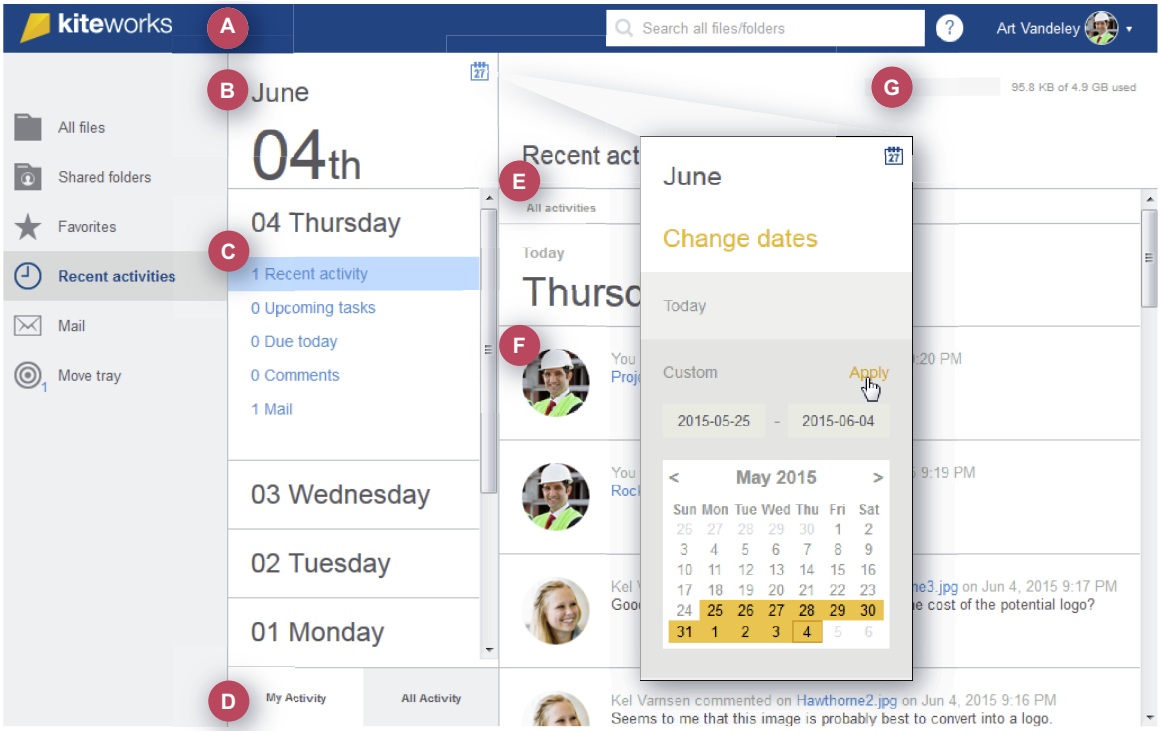
The specific sections of this screen are described in the following table.

Table 4. List View

Identifier	Description	Notes
A	Search, Help, Settings	Use the banner bar for performing Search Functions, accessing the Help, and how to Edit Settings for your account.
B	Detail View	Allows you to toggle the view to the Detail view. Refer to Detail View: Explore Your Files and Folders
C	Path to folder structure	Shows how deeply into the folder structure the current folder resides. You can click each level to navigate through the file structure.
D	Actions	Allows you to perform actions on selected files and folders, including uploading new files, adding new folders, requesting files, and other actions specific to the selected file or folder.
E	Contents of selected folder	Shows all folders and sources in the system. Click the triangles to expand or collapse the folders.
F	List of files/folders	Lists the contents of the current folder. To select the file or folder, click the box next to the file or folder. To select all items in the folder, click the box in the header.
G	Search	Allows you to perform an Basic Search of the contents of files, folders, and emails sent/received.
H	Selected item(s) header	Shows you what is currently selected in the folder, and shortcuts to the actions you can perform on those items.
I	Filter	Allows you to filter the folder to show: • All items • Those managed by you • Those you have marked as a favorite • Those you have deleted
J	Action shortcut icons	Shows you shortcuts to the actions you can perform on the items in the folder, including managing access to the folder, emailing the file, and others.

Recent Activities View: Track Your Work

To see the status of tasks and other activities in **kite**works, in the left Navigation pane, click **Recent Activities**. It is here that you monitor new files sent to or shared with you, view all activities, manage tasks, and view comments.



The icons are described in the following table.

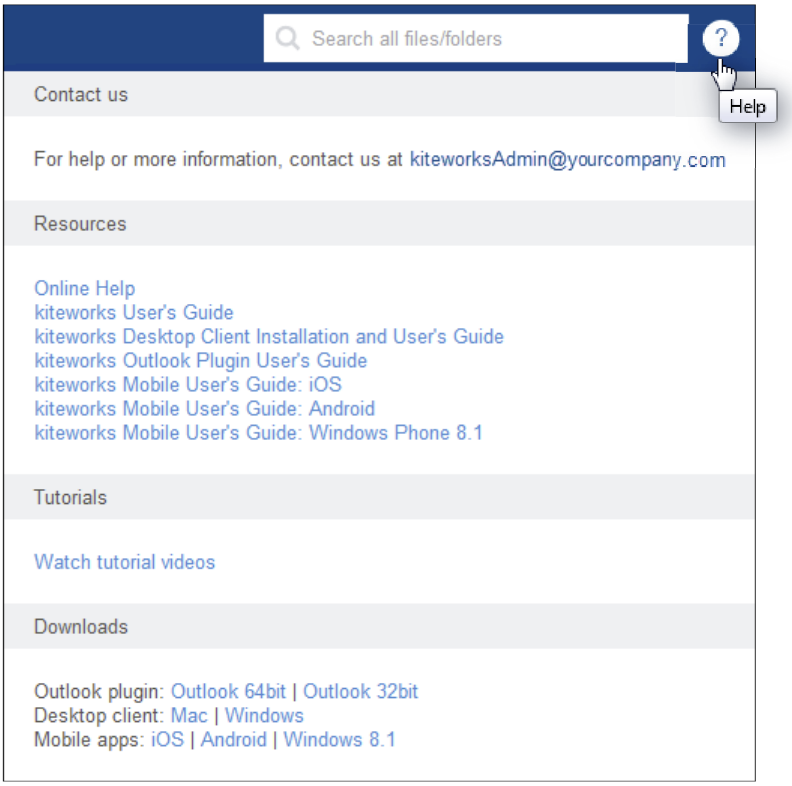
Table 5. Activity View

Identifier	Description	Notes
A	Search, Help, Settings	The top navigation bar has entries for performing Search Functions, accessing the Help, and how to Edit Settings for your account.
B	Date	Shows today's date, or the date you have selected using the Date Range picker.
C	Activities	Includes recent activities, upcoming tasks, tasks due today, comments you have made, and emails sent or received on today's date or the date that you have selected.
D	Activity Toggle	Toggles between all activity and your activities.
E	Activity Filter	Filters activity shown on the activity list.
F	Activity List	Includes comments, tasks, status of tasks, history of uploads, downloads, file and folder management activities, people management activities, and other information pertaining to your files in **kite**works.
G	Quota used	If you have a limit to the amount of storage you can use, your usage is shown here.

Go Mobile

The **kite**works Mobile App gives you access to all of your files from your mobile device. The devices supported by **kite**works include phones and tablets for iOS and Android.

To get started, download the mobile app from the iTunes or Android stores. The link to download the app is in the *Help* screen on **kite**works:



Should your device become lost, stolen, or somehow compromised, your **kite**works Administrator can remotely wipe your device of all files accessed via the **kite**works Mobile App. Contact your Administrator immediately if your device is no longer secure.

For specific details about Accellion's mobile offerings, refer to the *kiteworks Mobile User's Guide* or contact your **kite**works Administrator.

Collaborate

You can collaborate with others in four distinct ways:

1. Folder Management and Actions

   Sharing folders enables you to collaborate and share files with groups of people inside and outside of your organization. The process involves creating a folder, adding files to that folder, and then adding people to the folder, giving them access. The extent of their access is determined by you, the creator and manager. Permissions, or Roles, that you assign to others can range from being managers of those files (with the ability to add users, upload, download, lock, edit, and delete files), to only having the ability to view the files that exist in that folder.

   You can perform the following actions on **folders**:

   - Create a New Folder
   - Share Access to a Folder
   - Edit Folder Properties and Mark a Folder as Restricted
   - Manage Notifications
   - Download an Entire Folder
   - Add or Upload Files to a folder
   - Delete a Folder

2. File Management and Actions

   When the recipient receives the Mail, she/he clicks the link and downloads that file to his or her own system from **kite**works.

   You can perform the following actions on **files**:

   - Email a File or Email a Preview of a File
   - Add or Upload Files
   - Download files
   - Lock/Unlock
   - Delete and Recover a Deleted File
   - View and Change Versions
   - Add to The Move Tray

3. Add Tasks and Comments

   Those people who have access to a shared folder in **kite**works can add a comment to individual files. Owners, Managers, and Collaborators can also assign tasks to other users in the folder. These tasks are tracked on the Activities View and on the activities listed underneath the file.

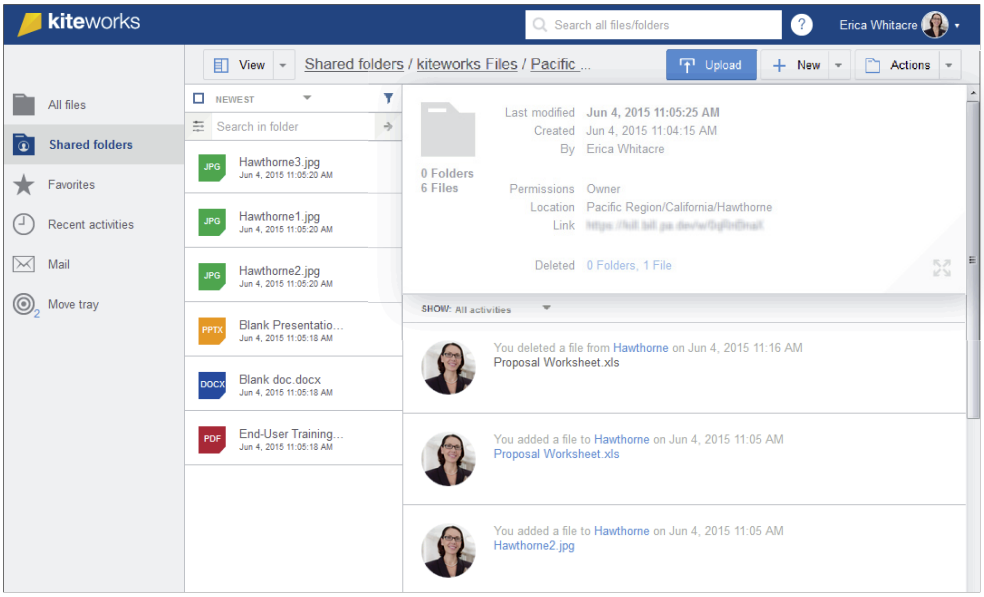
4. Access Enterprise Content Sources (License-Enabled)

   With the Enterprise Connect feature enabled, **kite**works provides access to remote file shares and cloud storage solutions such as SharePoint, CIFS, Box, Google Drive, and others. Access to enterprise content sources is managed by your **kite**works Administrator.

Folder Management and Actions

Folders enable users to collaborate and easily share the files within the folder. Note that what you're allowed to do depends on what role you have in that folder. See Roles for more information.

When you navigate to a folder using the detail view, the following information appears.



Folder information includes the following details:

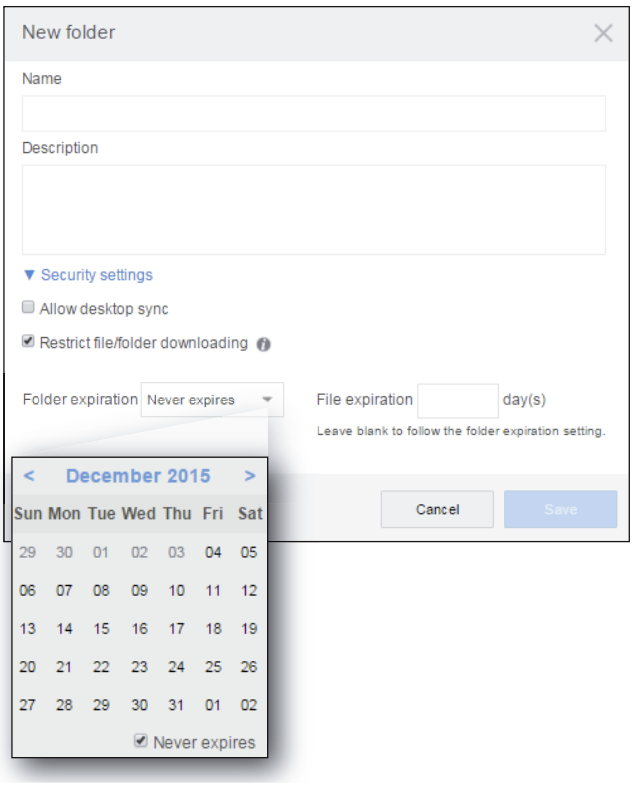
Table 6. Folder Details Information

Detail Header	Description and Notes
Last Modified	The date the last activity occurred within the folder.
Created	The date the folder was created.
By	The user name of the person who created the folder.
Permissions	Your role in the folder. For more information, refer to Roles.
Location	The folder structure in which the folder resides ("breadcrumb" to the current folder). Also indicates whether the folder was previously "owned" by another user (refer to Roles).
Link	The link to the folder. You can copy this link and send it to other users of the folder, and those users will be able to follow the link to the folder. If a user hasn't been explicitly added to a folder, the user won't be able to access the folder using the shared link.
Deleted	The number of files and folders that have been deleted in the folder, and the size of those deleted folders.
If you click the "expand" icon in the lower-right corner ( ), the following information appears:	
Expiration	The date that the folder expires and will be deleted.
Allow Sync	Whether the folder allows sync; for more information, refer to the *kiteworks Desktop Client User's Guide* or contact your Administrator.
Quota	Your total quota available to you in your **kite**works system. To change this quota, contact your Administrator.

Create a New Folder

To add a folder, perform the following steps.

1. In **kite**works, navigate to where you would like the new folder to exist.
2. In the upper-right corner of the screen, click **New** (+) and select **Folder**. The *New folder* window appears.



3. Name the folder and add a description.
4. Select the Security Settings:

   Allow desktop sync

   Restrict files/folder downloading (see Restricted Folders for more information)
5. Set a folder expiration date and determine whether sync will be permitted. The default is to not allow sync.

Note These options are only available for root folders; *i.e.*, folders that exist in the **kiteworks Files** folder, not a nested folder within **kiteworks Files**. Nested folders inherit the setting of the root folder. (For more information about sync, refer to the *kiteworks Desktop Client Installation and User's Guide*, located in the help button on **kite**works).

6. Set an expiration date for the files in the folder. To set no expiration, leave the *File expiration* field blank.
7. Click **Save**. The folder is now created.

Restricted Folders

Sometimes enterprise content is so sensitive, that you may need to ensure that the content stays in kiteworks while you collaborate with internal or external users. When a folder is marked Restricted, you prevent Collaborators and Downloaders from moving the content out of kiteworks. Collaborators will still be able to use the kiteworkFile Actions

Mobile Editor to update and edit Microsoft Office files or to annotate PDFs.

See also:

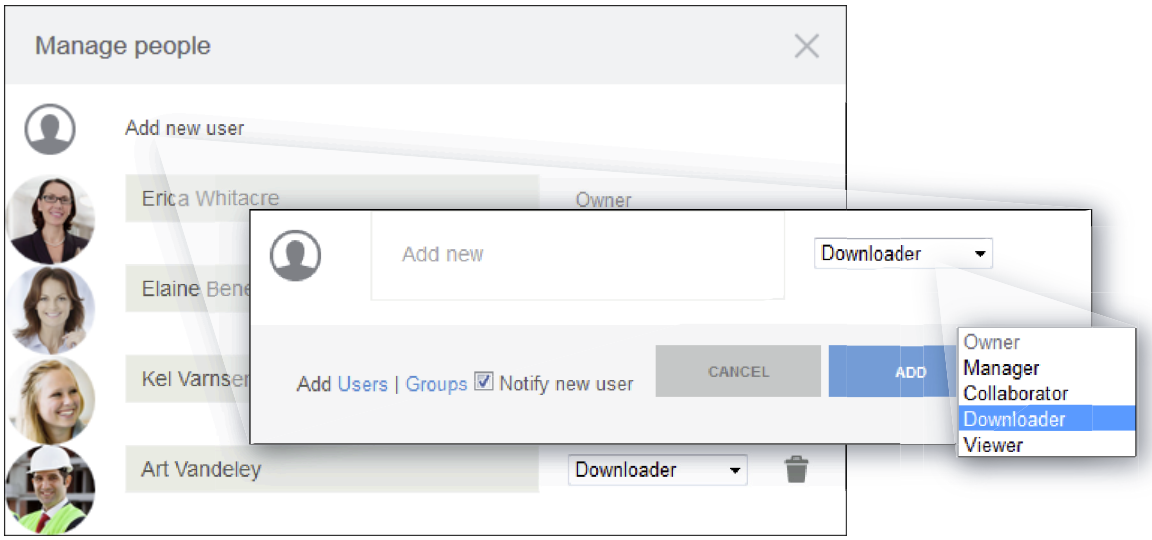
Edit Folder Properties and Mark a Folder as Restricted to mark existing folders as restricted.

User Roles in Restricted Folders

Share Access to a Folder

To invite others to collaborate on the files in a particular folder, perform the following steps.

1. Navigate to the folder that you would like to share.
2. In the upper-right corner of the screen, click **Actions** and select **Manage People**. The *Manage people* window appears, listing all of the users who have access to the folder.
3. Click **Add new user**. The *Add new* field appears at the top of the window.



4. Type in the email address(es) of the person or people with whom you would like to share. If you add more than one user, separate each address with a semicolon.
5. Using the drop-down list, select the role you would like the user(s) to have in the collaboration. (For more information about roles, refer to Roles.)

Note If you would like different users to have different roles, you must add them separately.

6. Check to indicate whether that new user should be notified via automatic email that s/he has been added to the folder.
7. Click **Add**. A confirmation message appears at the top of the window.
8. Click × to close the window.

Roles

Roles are assigned by the manager of a specific shared folder; your role determines what functions you are allowed to perform in that shared folder.

The available roles that can be assigned to users in a folder are:

Viewer

The only action the user can perform is to view the files in a folder via the Accellion interface. Viewers cannot download a file to their device or desktop, they can only view files using the Online Viewer.

Downloader

Used for someone who needs to be able to download and view the files in a folder, but not upload new versions, upload new files, or assign tasks to others with access to that folder.

Collaborator

Used for someone who needs full access to the files in a folder. Collaborator cannot view existing users, or manage other users' access to the folder.

Manager

The second-highest level of control of a folder; generally assigned to someone who needs full access to all files within a folder and to control others' access to a folder.

Owner

The highest level of control of a folder; assigned by default to the person who creates a folder. Any content in the Owner's folder counts against his quota.

User Roles in Restricted Folders

When a folder is marked Restricted, Collaborators and Downloaders cannot move content out of the restricted kiteworks folder.

Collaborator

Cannot download or email content from the restricted folder. Collaborators can use the kiteworks Editor to update and edit Microsoft Files as well as annotate PDF files, but are unable to download, sync, or open the restricted files in external applications.

Downloader

Downloaders can only view the files in restricted folders using the Online Viewer.

Note The roles listed below are examples only. Adjust the roles based on your particular organization's needs.

Table 7. Examples and Use Cases of Each Role

Use Case	Viewer	Downloader	Collaborator	Manager	Owner
Legal	Defending counsel	The client Admin. assistant	Paralegals Legal team	Co-counsel to the lead lawyer	Lead lawyer
Research	Funding organization	Undergrads Admin. assistants	Research assistants Grad students	Professors involved in the research	Research lead
High-tech business	Temp. employees Consultants	Planning/Logistics Admin. assistants	Engineers Marketers Tech Writers	Vice-President Team Managers Dep't Managers	Project Manager

Table 7. Examples and Use Cases of Each Role

Use Case	Viewer	Downloader	Collaborator	Manager	Owner
Medical	Patients Approved family members	Nurses Assistants Billing Dep't	Specialists Technicians	Primary care doctor Lead doctor	Case Manager Dep't Head
Government	Enlisted personnel NGOs/Contractors with limited security clearance	Non-commissioned officers NGOs/Contractors with full security clearance	Lieutenants Ensigns	Lieutenant Commander	Commander

The following table lists details about the specific roles and duties/responsibilities of each role.

Table 8. User Roles and Access Privileges

Permission Control	Viewer	Downloader	Collaborator	Manager	Owner	Notes
View files	Yes	Yes	Yes	Yes	Yes	View files without downloading the file to a desktop or device. Refer to Online Viewer
View file expiration	Yes	Yes	Yes	Yes	Yes	View the date a file expires. Refer to Change File Expiration Date.
View Activities	—	Yes	Yes	Yes	Yes	View activities for a file or folder. Refer to Recent Activities View: Track Your Work.
Download	—	Yes	Yes	Yes	Yes	Download a file or folder to the desktop or to a mobile device. Refer to Download or Download an Entire Folder.
Send file	—	Yes	Yes	Yes	Yes	Send a file to an internal or outside entity. Refer to Email a File.
Add Comment	—	Yes	Yes	Yes	Yes	Add comments to a file or folder and see comments made by others. Refer to Add a Comment.
Subscribe for notifications	—	Yes	Yes	Yes	Yes	Request to receive an email notification any time an action is performed on a folder. Refer to Manage Notifications.
Be assigned a task	—	Yes	Yes	Yes	Yes	Users with Viewer privileges cannot be assigned a task. Refer to Add Tasks and Comments.
Send message	—	—	Yes	Yes	Yes	Send an email to all users in a folder. Refer to Send an Email to the Users of a Folder.
View users	—	—	—	Yes	Yes	View the users and their roles in a folder.
View other's tasks	—	—	—	Yes	Yes	View tasks that have been assigned to other users. Refer to Add Tasks and Comments.
Assign tasks	—	—	Yes	Yes	Yes	Add a task to a file, set a due date, and assign the task to a user. Refer to Add Tasks and Comments.
Upload	—	—	Yes	Yes	Yes	Upload files to a folder. Refer to Upload to Folder.
Edit	—	—	Yes	Yes	Yes	Edit files using the integrated mobile editor. Refer to the *kiteworks Mobile App User's Guide* for your particular device.

Table 8. User Roles and Access Privileges

Permission Control	Viewer	Downloader	Collaborator	Manager	Owner	Notes
View/promote versions	—	—	Yes	Yes	Yes	Access previous versions of the file and promote a previous version to become the latest version. Refer to View and Change Versions.
Delete versions	—	—	Yes	Yes	Yes	Delete a previous version of the file permanently. Refer to View and Change Versions.
Lock/unlock	—	—	Yes	Yes	Yes	Locking a file means the file cannot be edited. Refer to Lock/Unlock.
Delete files	—	—	Yes	Yes	Yes	Deleted files remain on the system for a set number of days before being permanently deleted. Refer to Delete and Recover a Deleted File.
Change file expiration date or status	—	—	Yes	Yes	Yes	Adjust the file expiration date or whether there is a file expiration date. Refer to Change File Expiration Date.
Delete folders	—	—	—	Yes	Yes	Deleted folders remain on the system for a set number of days before being permanently deleted. Refer to Delete and Recover a Deleted File.
Manage users	—	—	—	Yes	Yes	Add a user to a folder and set that user's role within the folder; remove a user from accessing to a folder. Refer to Share Access to a Folder.
Create nested folders	—	—	—	Yes	Yes	Create a nested folder under an existing folder. Refer to Create a New Folder.
Rename folders	—	—	—	Yes	Yes	Rename the folder or edit the folder description. Refer to Edit Folder Properties and Mark a Folder as Restricted.
Permanently delete	—	—	—	Yes	Yes	Permanently remove an item from the system so that it may not be restored and so that it no longer uses storage quota. Refer to Delete a File Permanently.
Enable/disable sync	—	—	—	Yes	Yes	Enable and disable sync for a folder. Refer to Edit Folder Properties and Mark a Folder as Restricted.
Delete others' tasks or comments	—	—	—	Yes	Yes	Remove or edit other users' tasks or comments. (The comment or task creator can always delete or edit his own comments or tasks.) Deleting a comment also deletes all replies to that comment. Refer to Add Tasks and Comments.
Have uploaded files count against your quota	—	—	—	—	Yes	When you are the owner of a folder whatever files or folders are uploaded to that folder by anyone else counts against your personal quota, set by your Administrator. For more information about quotas, refer to Manage Your Storage Quota.

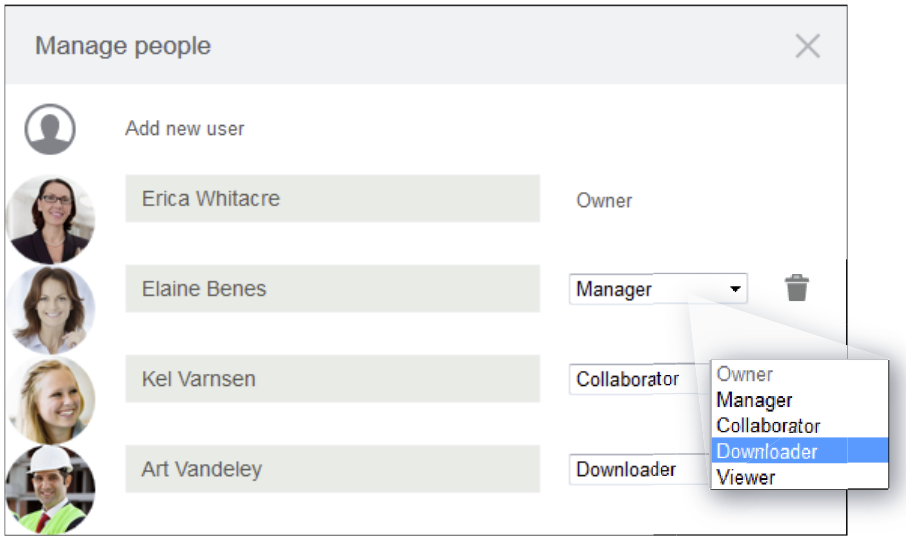
Change User Roles

To change the role of an existing user in a folder, perform the following steps.

1. Navigate to the folder that you would like to share.

2 In the upper-right corner of the screen, click **Actions** and select **Manage People** ( ). The *Manage people* window appears, listing all of the users who have access to the folder.

3 Using the drop-down menu, select the user's new role.



Note If there are nested folders within the selected folder, you are prompted whether you would like to change the user's new role to all nested folders.

You may only be able to "promote" the user to a higher level. To "demote" a user, you must go to the root folder to which the user was originally assigned.

4 A confirmation message appears at the top of the window. Click to close the window.

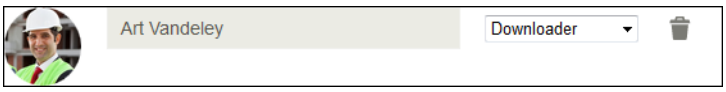
Delete a User

You can only delete a user from a folder to which he was originally assigned; that is, you cannot delete a user from a nested folder when he has access to the parent folder.

1 Navigate to the folder to which the user has access.

2 In the upper-right corner of the screen, click **Actions** and select **Manage People** ( ). The *Manage People* window appears, listing all of the users who have access to the folder.

3 Next to the user's name, click the "delete" icon ( ). (If the icon does not appear, navigate up one level in the folder hierarchy, until the icon appears.)



4 A confirmation window appears, asking whether the deletion applies to all nested folders. Click your preference.

A confirmation message appears. The user no longer has access to the folder and its contents.

Manage Your Storage Quota

Your Administrator sets your storage quota. This quota applies to all folders that you own, and all files that are uploaded to the Move Tray (see Add or Upload Files). Having any other role in other folders does not affect your storage quota.

To manage your storage quota most efficiently, follow these best practices:

- Clear the Move Tray of files that you have uploaded (see The Move Tray).
- In folders that you own, delete unnecessary files (refer to Delete and Recover a Deleted File).
- Permanently delete files or folders that you have deleted from your folders (refer to Delete a File Permanently).
- Remove unnecessary previous versions of files in a folder (see View and Change Versions).
- Contact your **kite**works Administrator to increase your storage quota.

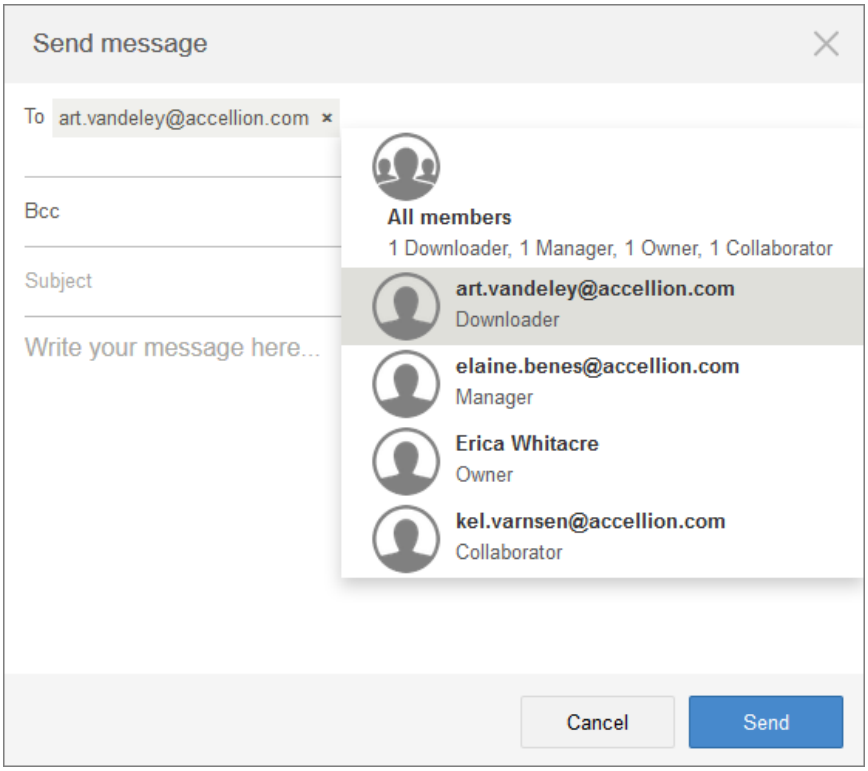
Send an Email to the Users of a Folder

You may need to send an email to users sharing a folder. This procedure is not to email a file to them, but simply to communicate with them via email.

To send an email to the users of a folder, perform the following steps.

1 Navigate to the folder.

2 In the upper-right corner of the screen, click **Actions** and select **Send message**. The *Send message* window appears.



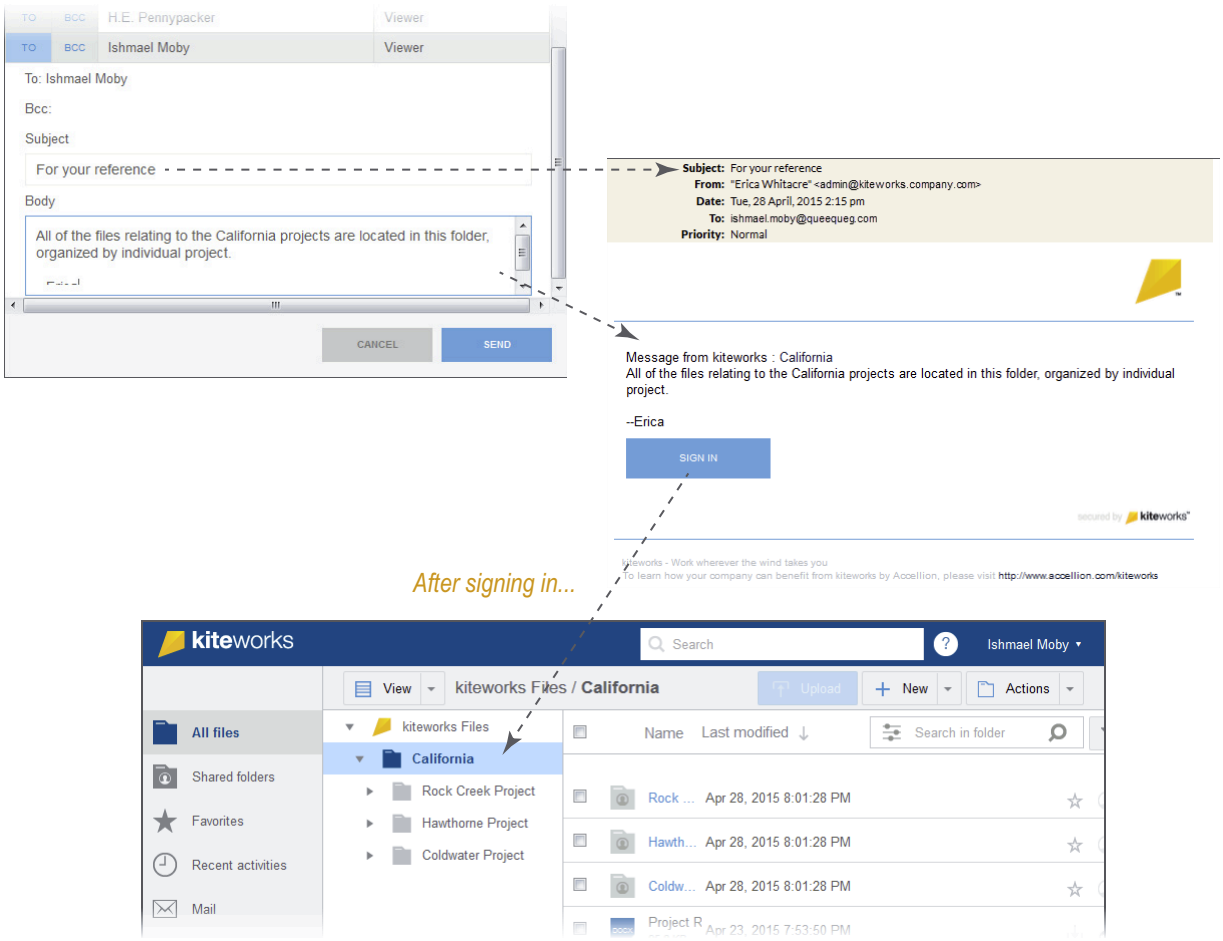
3 Click either **TO** or **BCC** to get the list of users you can message. You can send the message to all users or select individual members of the folder.

4 Type in the *Subject* and *Body* of the email.

Note If you have set a "signature" on the **Settings** page (refer to Message Signature), your signature is appended to your email.

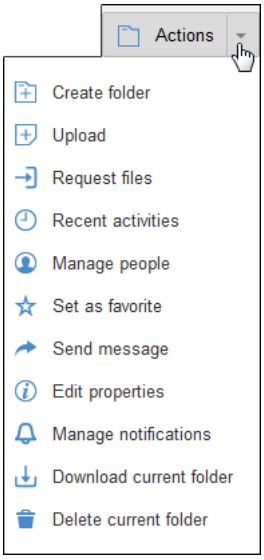
5 Click **Send**. Your email is sent to the selected users as being from you (your listed display name).

6 When the recipient(s) click **Sign In**, they are taken to the folder from which you sent the message.



Folder Actions

When you select a folder, you can perform the following actions on that folder:



Create folder; see Create a New Folder

Upload; see Add or Upload Files

Request files; see Request a File

Recent activities; see Recent Activities

Manage people; see Share Access to a Folder

Set as favorite; see Make a Folder a Favorite

Send message; see Send an Email to the Users of a Folder

Edit properties; see Edit Folder Properties and Mark a Folder as Restricted

Manage notifications; see Manage Notifications

Download current folder; see Download an Entire Folder(to enable the applet, refer to Message Signature)

Delete current folder; see Delete a Folder

Your ability to perform these functions may be limited by your role in that folder. For more information, refer to Roles.

Edit Folder Properties and Mark a Folder as Restricted

If you are an Owner or Manager of a folder, you can edit the folder's properties. These properties include the name and description of the folder, mark the folder as restricted or allow desktop sync, and change the folder and file expiration dates.

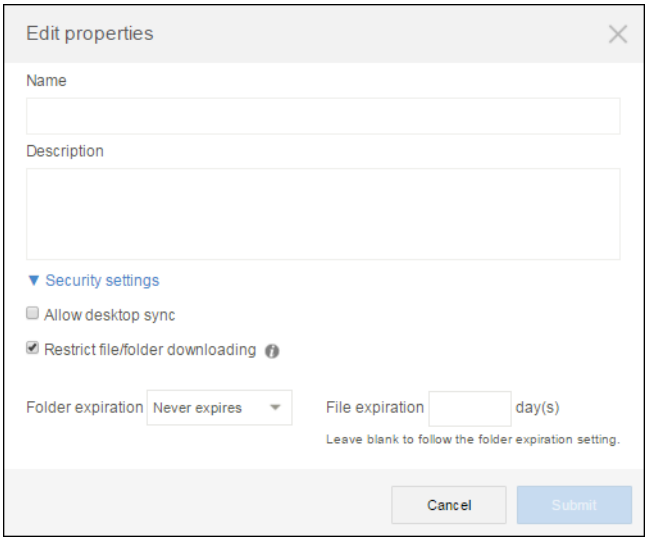
Note If the folder is a "root" folder, that is, at the top of the folder hierarchy under "**kite**works Files", you can edit the folder expiration date. Otherwise, this date cannot be edited.

In "root" folders, you can also edit whether the folder can be synced using the **kite**works Desktop Client. For more information about syncing, refer to the *kiteworks Desktop Client Installation and User's Guide*. To download the Desktop Client, from the Help screen on the **kite**works interface, click **Desktop Client** for Mac or Windows.

To edit the properties of a folder, perform the following steps.

1. Navigate to the folder you would like to edit.

2 In the upper-right corner of the screen, click **Actions** and select **Edit Properties**. The *Edit properties* window appears.



3 Make the changes to the field(s) you wish to edit.

4 Click **Submit**. The properties have now been changed.

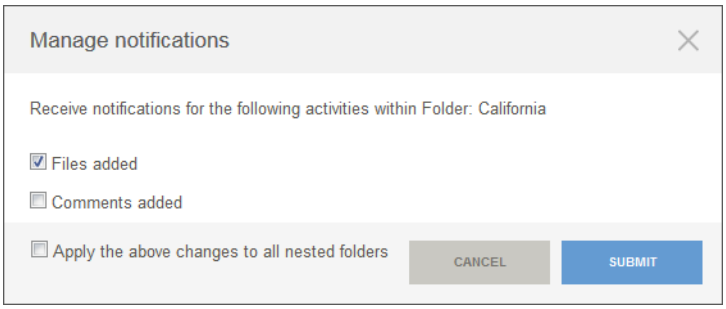
Manage Notifications

If you are an Owner, Manager, Contributor, or Downloader in a folder, you can manage the notifications (email messages) that you receive about activity that occurs within the folder.

To edit the circumstances in which you receive notifications, perform the following steps.

1 Navigate to the folder you would like to manage.

2 In the upper-right corner of the screen, click **Actions** and select **Manage notifications**. The *Manage notifications* window appears.



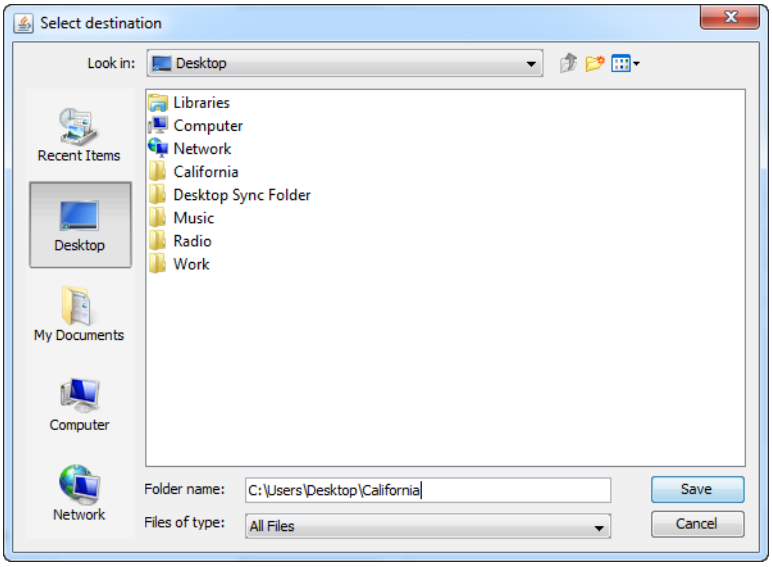
3 Click the activity for which you would like to receive a notification. Also indicate whether this change should apply to all nested folders within this folder.

4 Click **Submit**. You will then receive an email notification whenever that type of activity occurs within the folder.

Download an Entire Folder

To download the entire folder and its contents, perform the following steps.

1. Navigate to the folder you would like to download.
2. In the upper-right corner of the screen, click **Actions** and select **Download current folder**.
3. In your operating system's *Select destination* window, navigate to the location to which you would like the folder to be downloaded, and click **Save**.



4. Navigate to the location to which you would like the folder to be downloaded, and click **Save**.
5. You are shown the status of the download, and when the download is complete, you are shown "Download complete".
6. Click × to close.

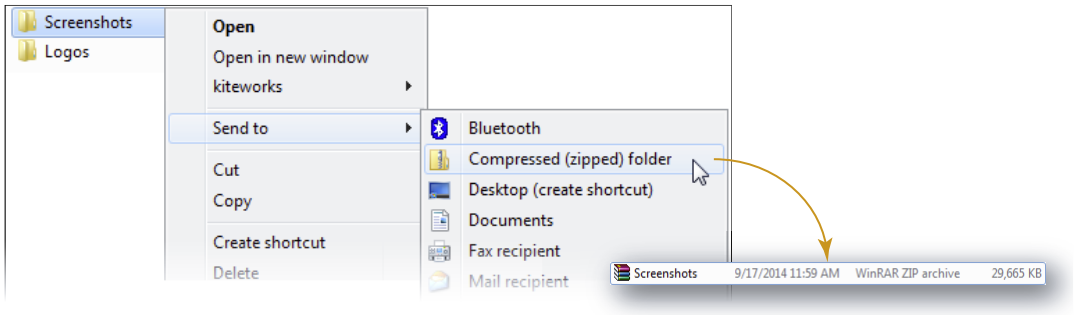
If you click **Cancel** during the download, the download stops and, depending on how much of the download has progressed, the folder may be partially downloaded to the location you specified.

Use Zip Files for Easy Transfer of Multiple Files

If the folder to upload to **kite**works contains a large number of files, you may find it easier to create a zip file with all of the files in it. You can then upload the single zip file to **kite**works, so other users only have to download the single file.

1. In Windows systems, go to your desktop file management tool and right-click the folder that contains the large number of files.

2 Click **Send To** and select **Compressed (zipped) folder**. The zip file is created.



3 Open **kite**works and navigate to the location that you would like the file to reside.

4 In the upper-right corner of the screen, click **Upload** ( ). The *Add new files* menu appears.

5 From here, you can either:

- Drag the zip file and drop into the window.

  OR

- Click **Choose Files**, which opens the *File Upload* dialog box. From here, navigate to the zip file. Select the file, and click **Open**.

6 Click **Add**. The zip file that contains all of the files you compressed is now located in the folder you selected and is available for download to those people with download access to the folder.

Delete a Folder

If you are an Owner or Manager of a folder, you can delete that folder and the folders nested within. The file may be recoverable after deletion, depending on Administrative settings. For more information about recovering files or folders, refer to Recover a Deleted or Expired File.

To delete a folder, perform the following steps.

1 Navigate to the folder you would like to delete.

2 In the upper-right corner of the screen, click **Actions** and select **Delete current folder**. A confirmation window appears.

3 Click **Yes**. The folder is now deleted.

Note When you delete a folder, all nested folders are also deleted.

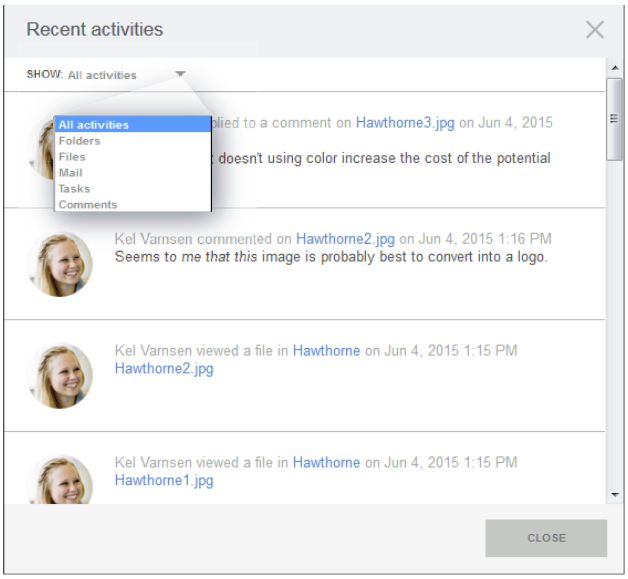
Recent Activities

When you are using the list view, you have the same access to all of the information shown in the detail view; however, you access that information differently.

To view recent activities in a folder, perform the following steps.

1 Using the list view, navigate to the folder about which you would like to see the recent activities.

2 In the upper-right corner of the screen, click **Actions** and select **Recent activities.** The *Recent activities* window appears.



You can filter the activities that appear by:

Folders, for folder-related actions (such as adding folders or changing the folder properties; adding, editing, or deleting users of the folder)

Files, for file-related actions (such as uploading new, deleting, downloading, and viewing files; changing expiration dates; adding, deleting, and promoting versions of files)

Mail, for emails sent, received, deleted, and drafts saved

Tasks, for tasks relating to the files in the folder and progress of a task

Comments, for comments and replies made on files in the folder

3 Click **Close**.

Make a Folder a Favorite

You can filter the folder lists to show only those folders marked as “favorites”. When a folder is marked as a favorite, a blue star appears in the details about the folder.

Only folders can be marked as favorites. Individual files cannot be marked as favorites.

1. To mark a folder as a favorite, navigate to the folder to the folder.
2. In the upper-right corner of the screen, click **Actions** and select **Set as favorite** (☆). The folder is now a “favorite” and the action is recorded as an Activity.

To show only favorite folders in your folder list, in the left Navigational bar, click **Favorites** (★).

Access Enterprise Content Sources (License-Enabled)

With the Enterprise Connect feature enabled, **kite**works provides access to file share data when remote interface access is enabled.

Access to enterprise content sources is managed by your Accellion Administrator and you have access to the enterprise content sources based on your Active Directory privileges. Depending on the permissions set by your Administrator, you may also be able to add your own connections to different enterprise content sources.

Your Administrator can also configure your system to include your own Home Directory in a Windows, Unix, or Linux system.

The enterprise content sources appear when you are in the list view (refer to List View: Manage Your Files and Folders) or if you navigate to the highest level in the folder hierarchy in the detail view (refer to Detail View: Explore Your Files and Folders).

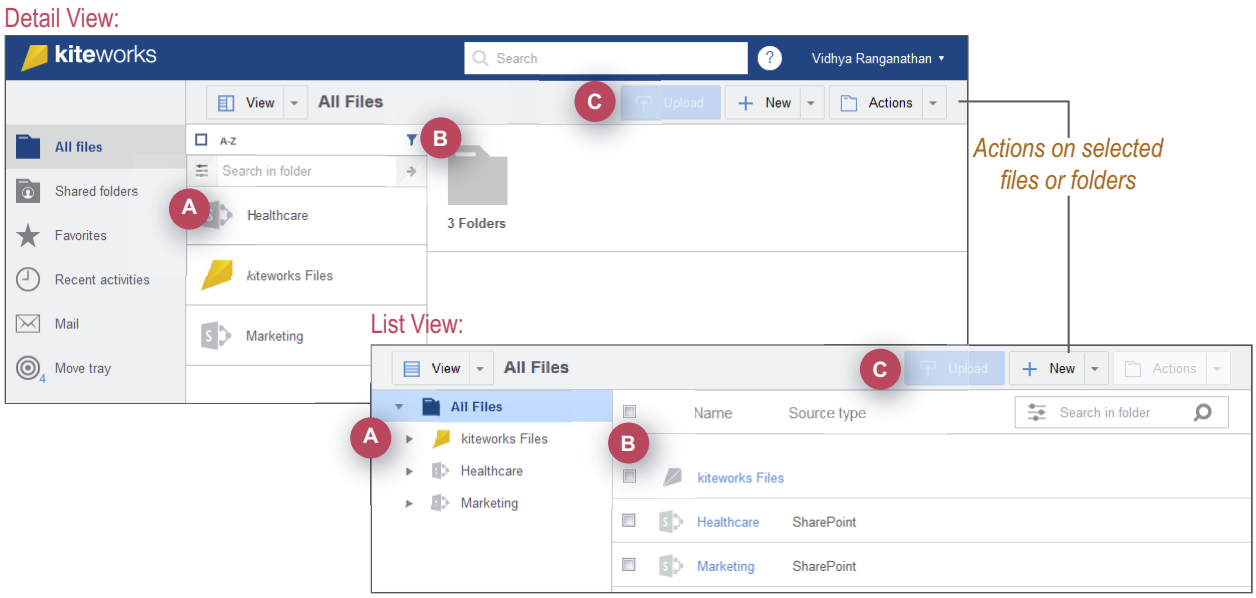


Table 9. Enterprise Sources

Identifier	Description	Notes
A	Types of Sources:	
	Box	Icon indicates that the content source is Box. **Note** End-users cannot add a new Box source. To add a new Box source, contact your Administrator.
	Documentum	Icon indicates that the content source is Documentum.
	Dropbox	Icon indicates that the content source is Dropbox. **Note** When you move files from a Dropbox source to **kite**works, the "Return to Content Source" action is not available. The action of moving the file from the Move Tray deleted the file from the source.
	eDOCS	Icon indicates that the content source is eDOCS. Note that the functionality using eDOCS is limited at this time.
	Google Drive	Icon indicates that the content source isGoogle Drive. **Note** End-users cannot add a new Google Drive. To add a new Google Drive, contact your Administrator.
	Home Share	Icon indicates that the content source is the home directory of your operating system. To add your Home Directory, contact your Administrator.
	kiteworks	Icon indicates that the content is in **kite**works.
	OpenText Content Server	Icon indicates that the content source is OpenText.
	SharePoint	Icon indicates that the content source is SharePoint 2007, 2010 or 2013.
	File Shares	Icon indicates that the content source is Windows File Shares (CIFS / SMB / DFS).
	Manage Legal Content	Icon indicates that the content source is Manage Legal Content.
B	Details about the files and folders	Lists details or files and folders contained in the selected folder.
C	Actions on the files and folders	Actions that you can perform on the selected files or folders.

From the enterprise content folders, you can perform the varying actions on files, depending on the source. Contact your Administrator for more information.

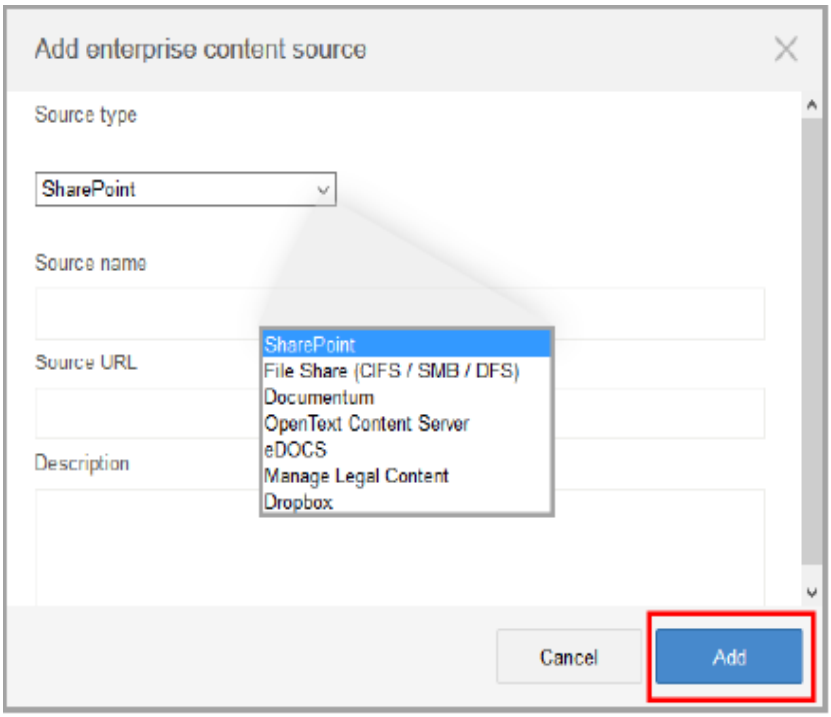
You use **kite**works to access files and folders, but you cannot make any changes to the folder hierarchy. The folder hierarchy continues to be managed outside of **kite**works. You can, however, add files and versions (where supported).

Refer to Use the Move Tray to Collaborate with Outside Users on Enterprise Content Files for tips on how to collaborate with others across multiple platforms.

Add a New Enterprise Content Source to kiteworks

When you have access to files from enterprise content sources, you may be able to add them to **kite**works, depending on your Administrator's settings.

1. In the upper-right corner of the screen, click **New** (+) and select **Add enterprise content source**. The *Add enterprise content source* window appears.



Each enterprise content source prompts you for different information, depending on the source's requirements. The *Source types* that you see are those that have been enabled by your Administrator. If you would like to add a source that is not listed, contact your Administrator.

2. Fill out the information for the type of source:
   - SharePoint
   - File Share (CIFS/SMB/DFS)
   - Documentum
   - OpenText Content Server
   - eDOCS
   - Dropbox

- Manage Legal Content

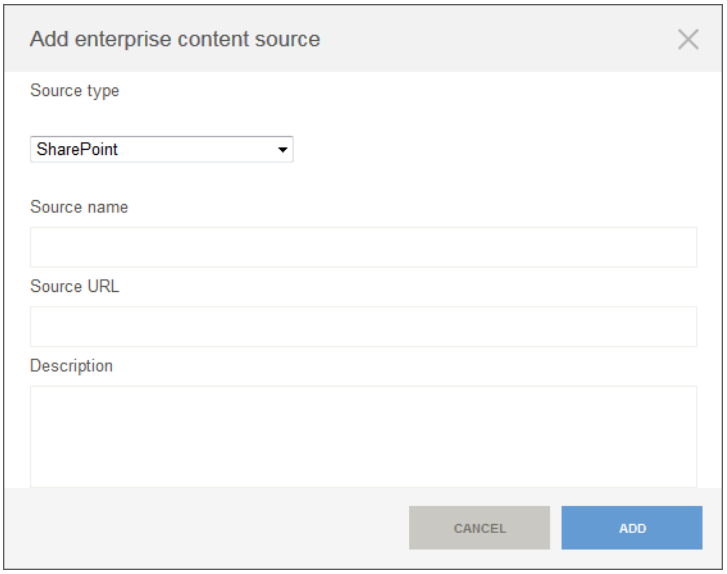
3 Click **Add**. The new enterprise content source should be added.

Note You may need to enter additional credentials to add a new content source. If this happens, you are shown an error message that says "Invalid credential". The *Add Enterprise content source* window re-appears, with the addition of *Login ID* and *Password* fields.

Fill in these fields and click **Add**.

SharePoint

On the *Add Enterprise content source* window, under *Source type*, select **SharePoint.**



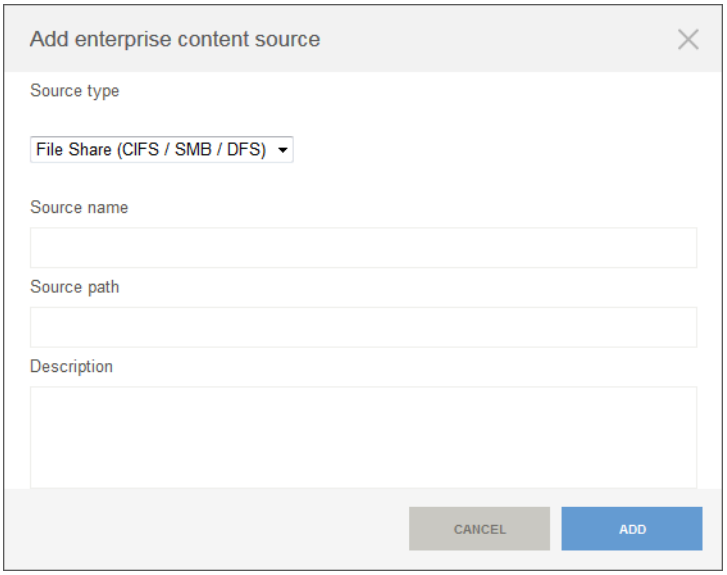
The following information must be added to the screen:

- **Source name** — You can choose any name for the source.
- **Source URL** — The URL to SharePoint site.

  For example, for the SharePoint site http://sp2010-demo/marketing/default.aspx the Source URL should be http://sp2010-demo/marketing/default.aspx
- **Description (optional)** — Used to describe the connection.

File Share (CIFS/SMB/DFS)

On the *Add Enterprise content source* window, under *Source type*, select **File Share**.

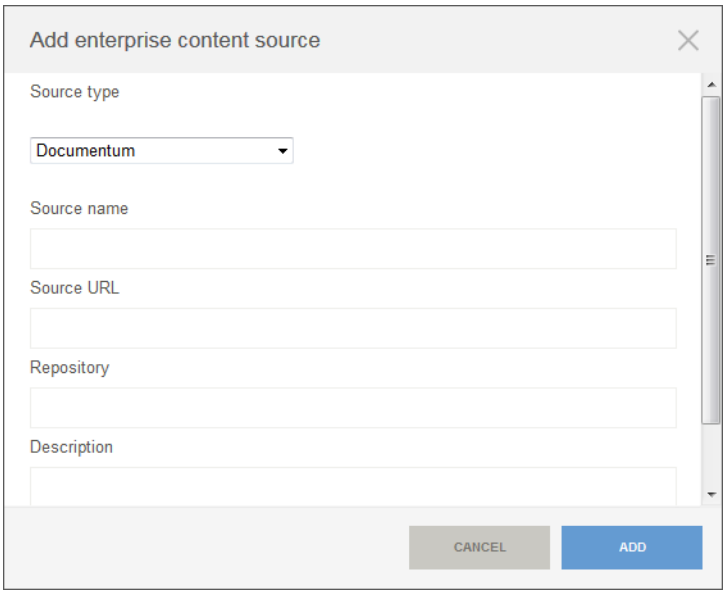


The following information must be added to the screen:

- **Source name** — You can choose any name for the source.
- **Source URL** — The path to File Share.
- **Description (optional)** – Used only to describe the connection.

Documentum

On the *Add Enterprise content source* window, under *Source type*, select **Documentum**.



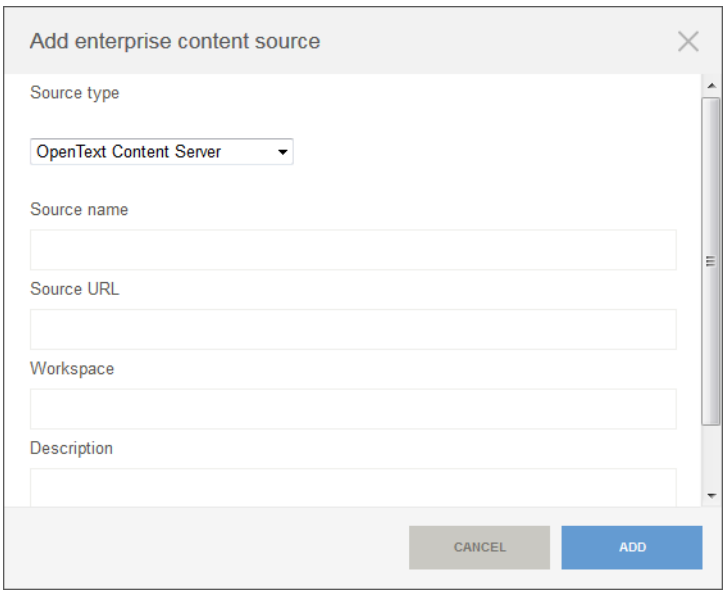
The following information must be added to the screen:

- **Source name** — You can choose any name for the source.

- **Source URL** — The URL to Documentum site.
- **Repository** — The name of the Documentum Repository to which you want to connect.
- **Description (optional)** — Used only to describe the connection.

OpenText Content Server

On the *Add Enterprise content source* window, under *Source type*, select **OpenText Content Server**.

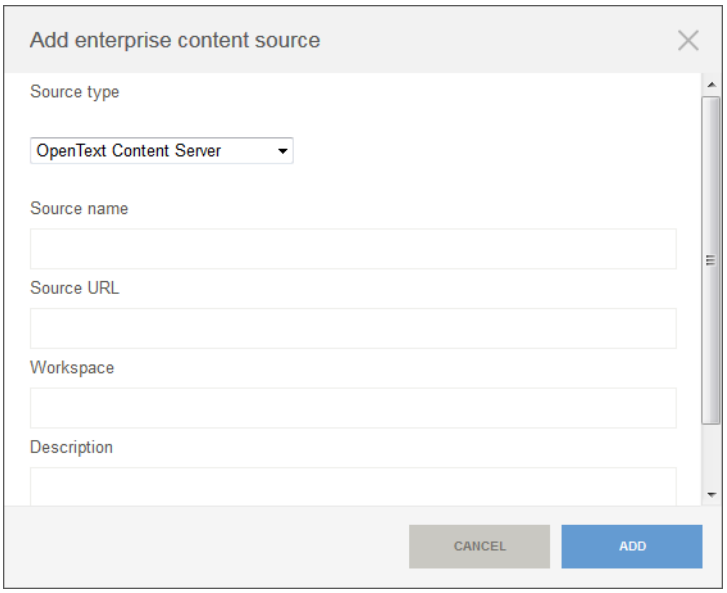


The following information must be added to the screen:

- **Source name** — You can choose any name for the source.
- **Source URL** — The URL to OpeText Content Server site.
- **Workspace** — The name of the OpenText Workspace to which you want to connect.
- **Description (optional)** — Used only to describe the connection.

eDOCS

On the *Add Enterprise content source* window, under *Source type*, select **OpenText Content Server**.

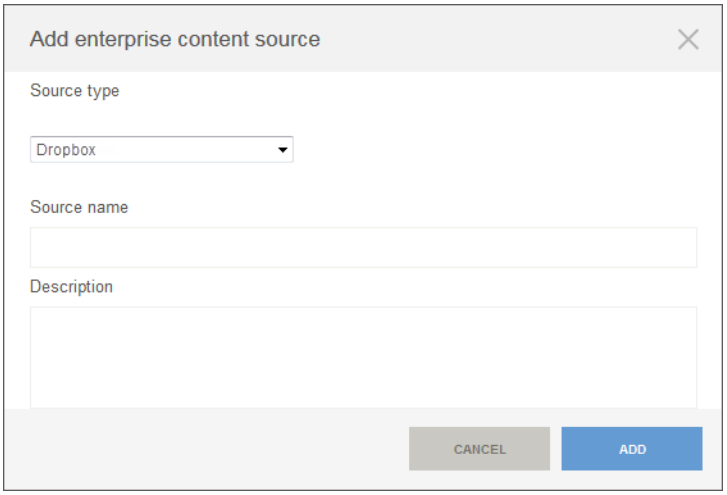


The following information must be added to the screen:

- **Source name** — You can choose any name for the source.
- **Source URL** — The URL to eDOCS site.
- **Library** — The name of the eDOCS library to which you want to connect.
- **Description (optional)** — Used only to describe the connection.

Dropbox

On the *Add Enterprise content source* window, under *Source type*, select **Dropbox**. (This option is enabled by your **kite**works Administrator.)



The following information must be added to the screen:

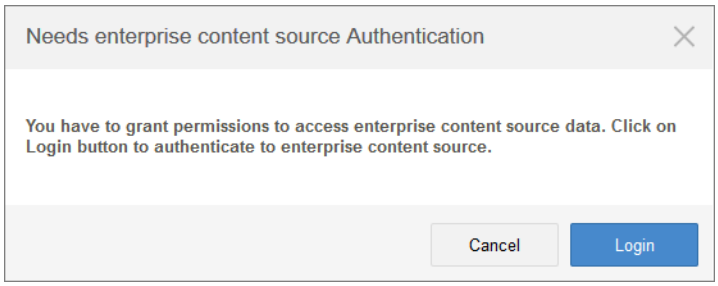
- **Source name** — You can choose any name for the source.

- **Description (optional)** — Used only to describe the connection.

Connect to Your Dropbox Account

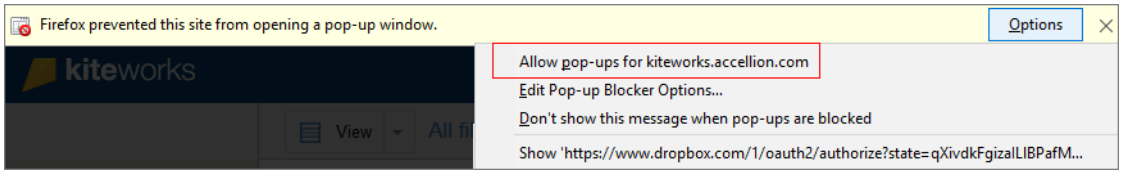
After adding Dropbox as your new enterprise content, perform the following actions:

1. Enter a name for the source and submit.
2. Click Login on the modal popup.



Note You may receive a notification that your browser is preventing the site from opening the Dropbox login page.

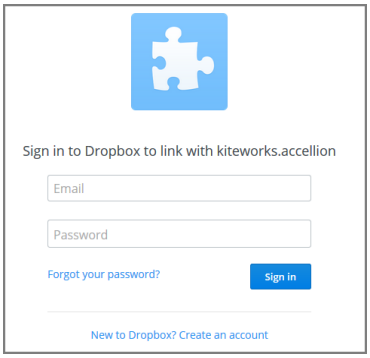
If this happens, click *Options* and allow pop-ups for kiteworks.accellion.com



If you're using the **Safari** browser, you may not receive a pop-up blocker notification in your browser window. In this case, you will be seeing the screen from step 2, and the login button will remain disabled.

To allow pop-up windows, go to *Safari Menu > Preferences > Security* and *untick Block pop-up windows* under *Web content.*

3. A new window opens with the Dropbox authentication page.



4. In the popup window log in to your Dropbox account and grant kiteworks access to your Dropbox content. Upon successful authorization, the pop-up window will close.

Note The administrator may have set a timeout on your Dropbox login window. If you encounter a timeout, cancel the login and repeat steps 1 and 2.

Manage Legal Content

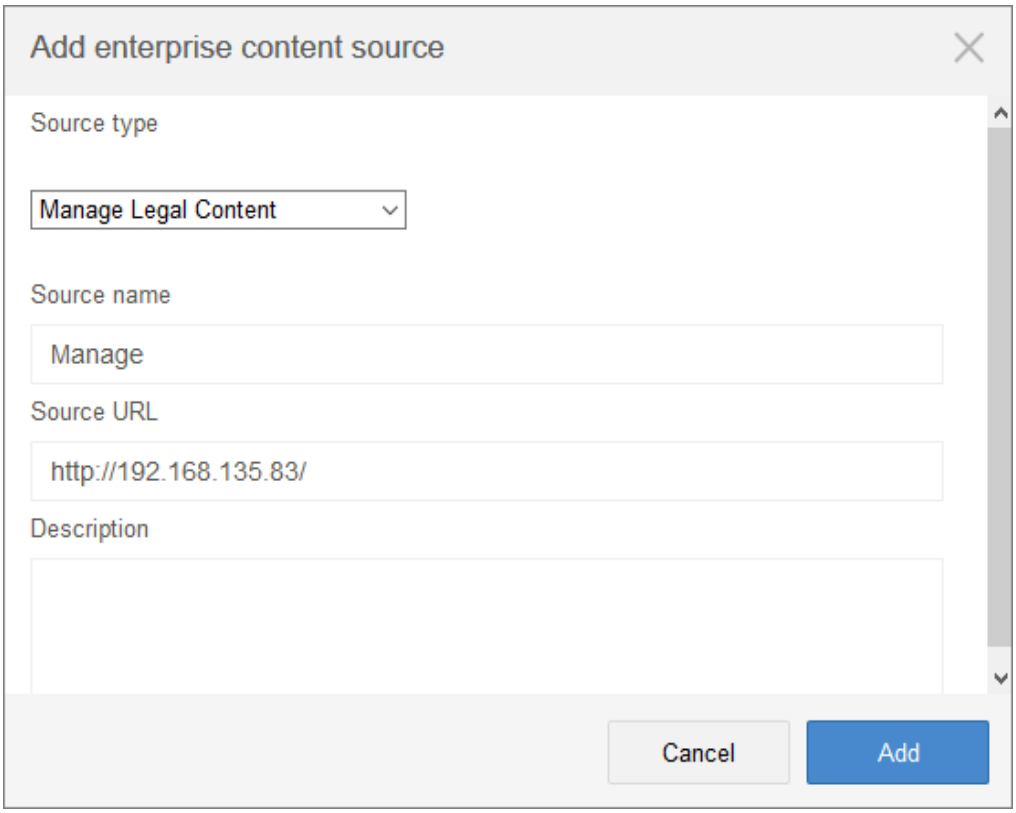
On the *Add Enterprise content source* window, under *Source type*, select **Manage Legal Content.**

The following information must be added to the screen:

- **Source name** - a name you choose to identify the source
- **Source URL** - IP address of the selected external source

Tap Add.

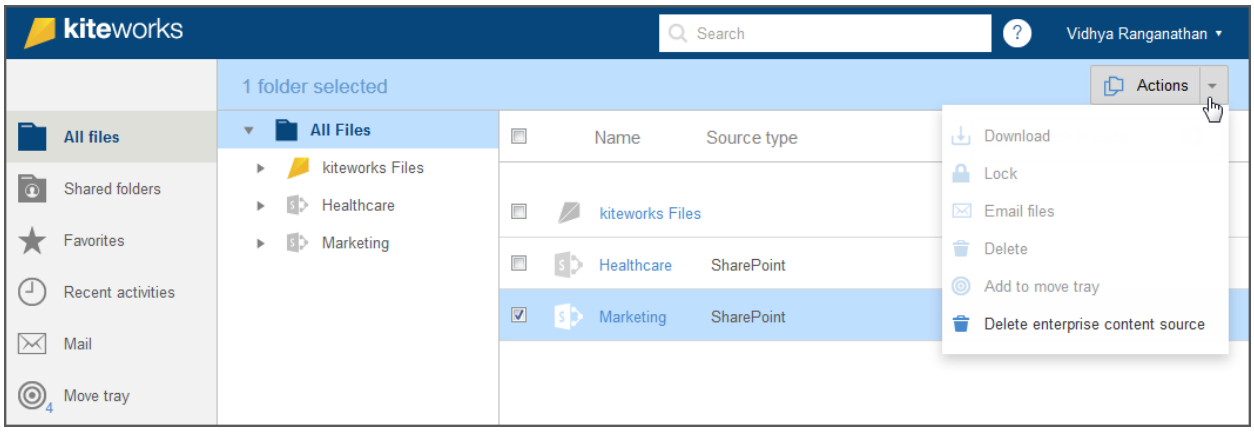
Note The field values are for demonstration purposes only. You may be prompted to enter credentials to access the content source.



Remove an Enterprise Content Source from kiteworks

To remove an enterprise content source from **kite**works, perform the following steps.

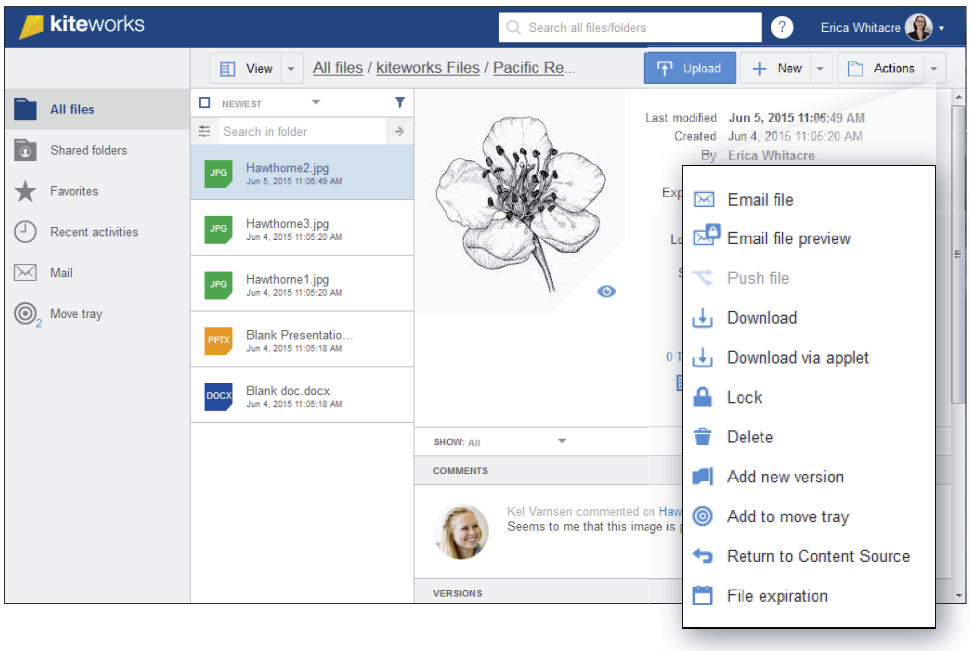
1. Using the list view (refer to List View: Manage Your Files and Folders), select the source you would like to delete.



2. In the upper-right corner of the screen, click **Actions** and select **Delete enterprise content source** ( ). A confirmation screen appears.
3. Click **OK**. The enterprise content source is now removed from your list of enterprise sources.

File Management and Actions

When you select a file, you can perform actions on that file from the *Actions* menu in the upper-right corner of the screen.



You can perform the following functions on files:

- Email a File and Email a Preview of a File

- Edit Files in Restricted Folders
- Download files
- Lock/Unlock
- Delete a File
- Add New Version
- Add to The Move Tray
- Return to Content Source (for files that were copied or moved from an enterprise content source; see Access Enterprise Content Sources (License-Enabled))
- Change File Expiration Date

Note Your ability to perform these functions may be limited by your role in that folder. For more information, refer to Roles.

Add or Upload Files

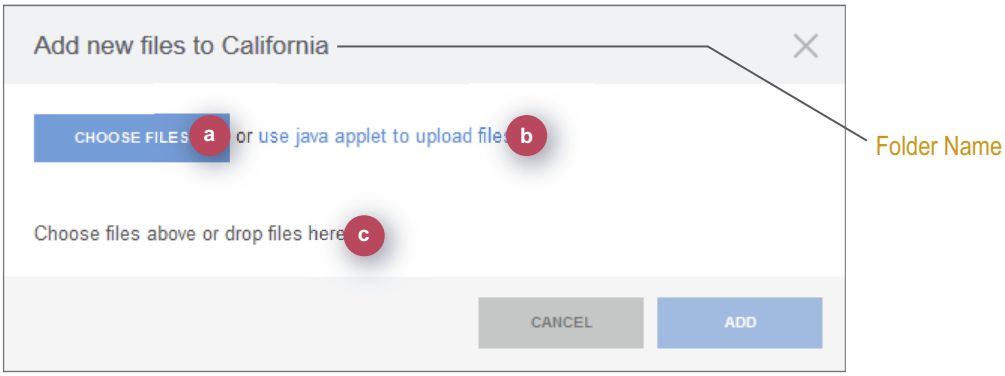
There are four methods to upload a file from your desktop to **kite**works. Choose the one that works best for your circumstances:

- Upload to Folder
- Upload File(s) via Applet
- Drag and Drop into kiteworks
- Upload to the Move Tray

Upload to Folder

This procedure uploads files directly to a folder in **kite**works.

1. Navigate to the folder in which the file(s) will reside.
2. In the upper-right corner of the screen, click **Upload** . The *Add new files* window appears.



3. From here:
   a. If you are using Internet Explorer 10 and above, Safarai 6 and above, Firefox 4 and above, Chrome 11 and above, click **Choose Files**, which opens the *File Upload* dialog box. From here, navigate to your file(s). Select the file, and click **Open**.

      OR

b. If you are using Internet Explorer 9 and below, Safarai 5 and below, Firefox 3 and below, Chrome 10 and below, click **use java applet to upload files**. If you choose this option, refer to Upload File(s) via Applet.

OR

c. Drag the file(s) and drop into the window.

Note The source location for the file must be from your operating system or desktop; the files cannot be located in another app, for example, Microsoft Outlook.

4 Click **Add**. The file is now located in the folder you selected and is available to those people with access to the folder.

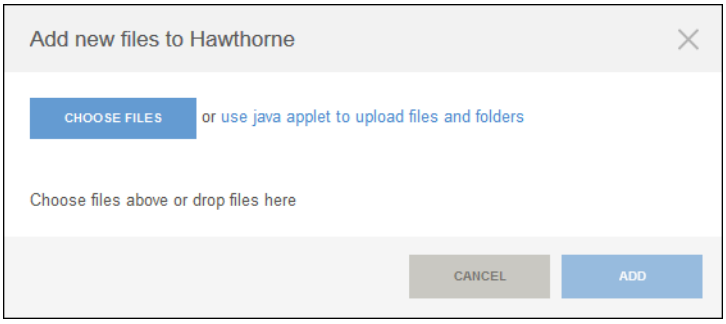
Upload File(s) via Applet

Select **Upload via Applet** if you want to upload a file larger than 4 GB, to upload multiple files greater than 4 GB, or to upload an entire folder from your computer, *and* if you are using Internet Explorer 9 and below, Safarai 5 and below, Firefox 3 and below, Chrome 10 and below, a, This option works only if the applet is activated by your Administrator.

To upload files to **kite**works using the Java Applet, perform the following steps.

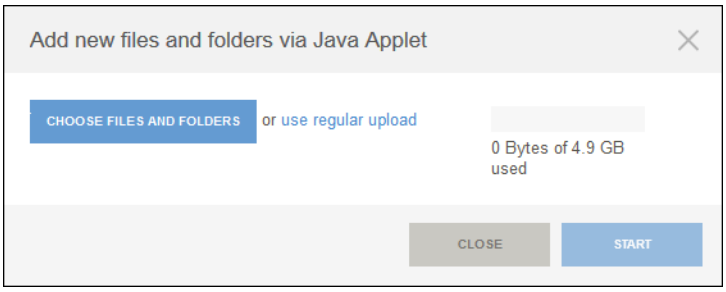
1 Navigate to the folder in which the file(s) will reside.

2 In the upper-right corner of the screen, click **Upload**. The *Add new files* window appears.



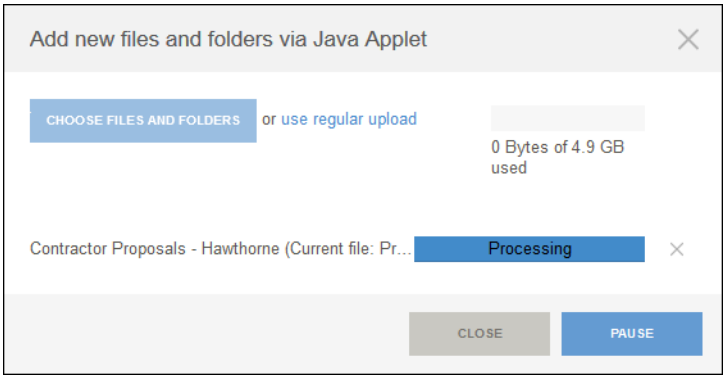
3 Click **use java applet to upload files and folders**.

4 Your browser may prompt you to allow Java permission to run. Click to allow it. The *Add new files via Java Applet* window appears.



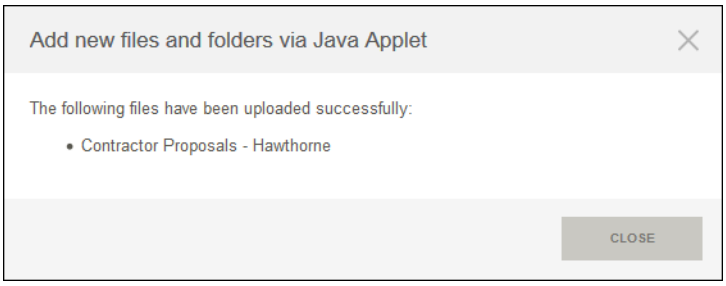
5 Click **Choose Files and Folders**, and navigate to the location of your files and folders to upload. To select multiple files, hold the control key (for individual files) or shift key (to select a range) while selecting the files.

6 Click **Start**. The uploading process begins, showing you the progress of the upload.



If any errors occur while uploading a file, the error is shown in this window. If errors occur, you are shown a list of those files that were unsuccessfully uploaded, with the option to try again.

7 When the upload is complete, a *Success* message appears, showing you a list of those files that were uploaded.



8 Click × or **Close** to close.

Troubleshooting

When you upload multiple files or folders using the applet, you must have Java installed on your system and your Administrator must have enabled the use of the applet.

If you have trouble with the applet, perform the following checks.

1 To check whether you have the most recent version and to download the newest version of Java, go to http://java.com and follow the steps.

2 If you have the most recent version of Java installed and are still having trouble, you may need to clear your Java cache. For instructions on how to do this, go to http://www.java.com/en/download/help/plugin_cache.xml and follow the instructions listed there.

3 For Safari users on a Mac:

Run the applet in “Unsafe Mode” so it can access the files on your hard drive to upload them to **kite**works. The Java applet is blocked by default from running properly in the latest version of Safari on the latest version of Mac OS.

To change this setting manually, go to the Apple Support site and see “Safari: About Internet Plugin Management.”

Caution Enable Unsafe Mode only for trusted websites (like **kite**works) to keep your content secure.

For more help, contact your **kite**works Administrator.

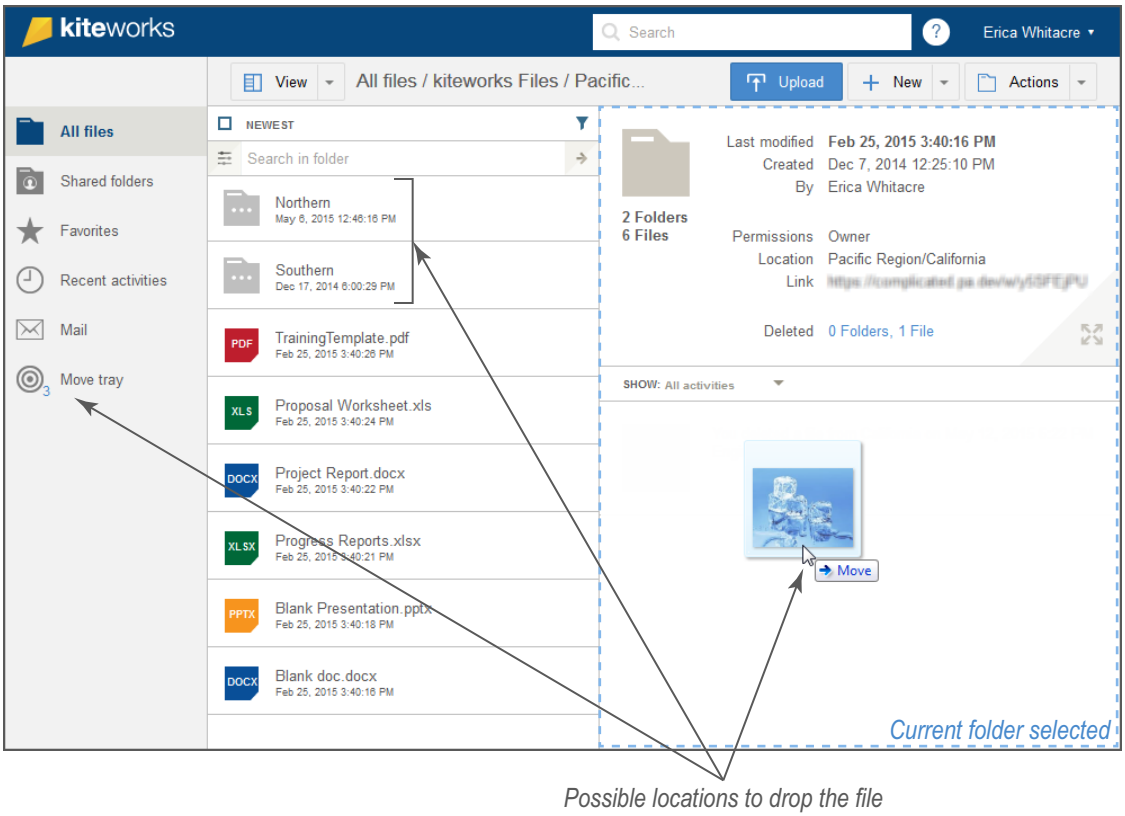
Drag and Drop into kiteworks

Perform the following steps to add a new file into **kite**works.

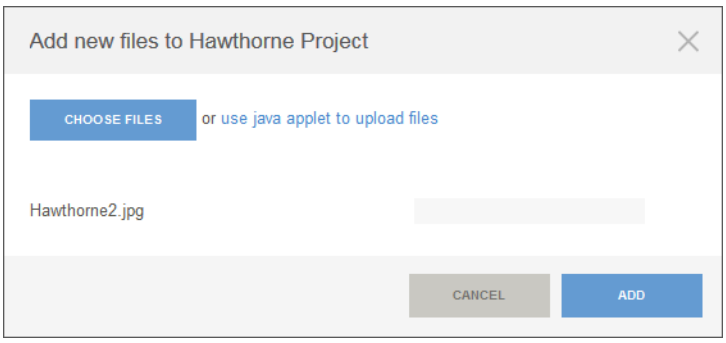
1. Navigate to the folder in which the file(s) will reside.
2. From your operating system's file browser or desktop, drag the file you would like to upload to **kite**works. A blue dotted outline appears around the destination folder.

Note The source location for the file must be from your operating system or desktop; the files cannot be located in another app, for example, Microsoft Outlook.

In this case, the file could be dropped in the selected folder, in any of the sub-folders in the selected folder, or in the Move Tray.



3. Drop the file into your preferred location. A confirmation window appears. (To add more files to the same location, click **Choose Files**.)

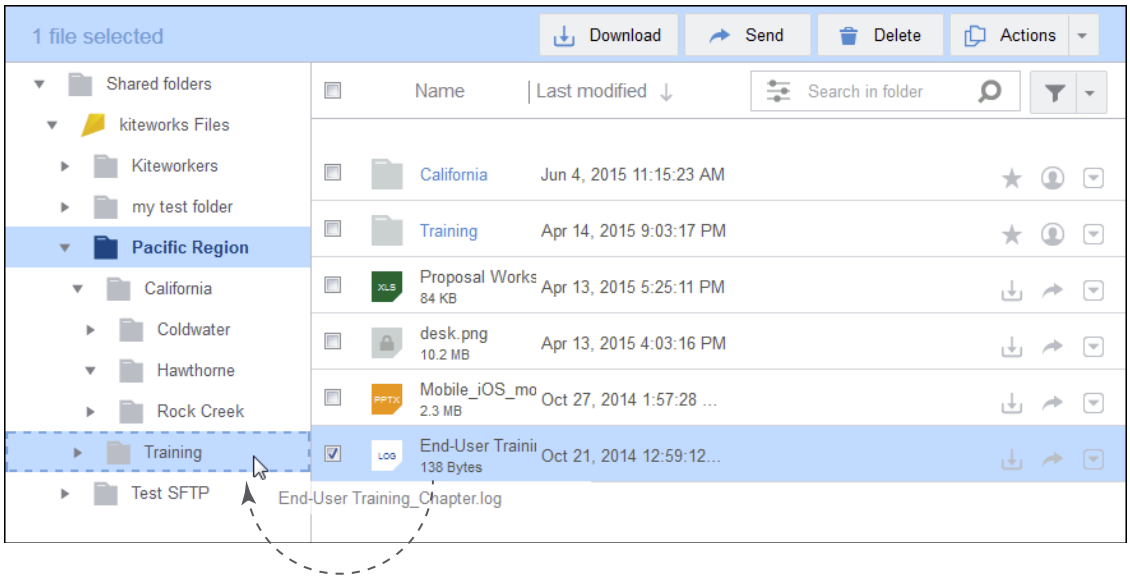


4. Click **Add**. After processing, the file is now uploaded to the location you specified.

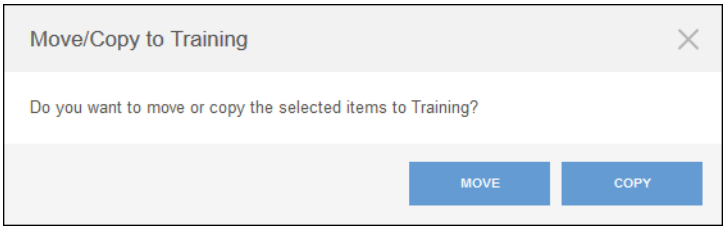
Drag and Drop between Folders

To move files between folders, perform the following steps.

1. Select the list view ( ), which shows all of the folders available to you.
2. Select the file(s) to move, and drag the file to the destination folder. A blue dotted outline appears around the destination folder.



3. A dialog window appears, asking whether you intend to copy the file(s) or move the file(s).



When you **move** a file to another folder, the file history, comments, and tasks move with the file. The file will be soft-deleted in the source location (it will be recoverable) and a new copy will be created in the destination.

When you **copy** a file to another folder, the copied file does *not* retain its history or associated tasks or comments. The original file remains in its original location and is copied to the destination folder.

4. A confirmation message appears, and the file has been copied or moved to the location you specified.

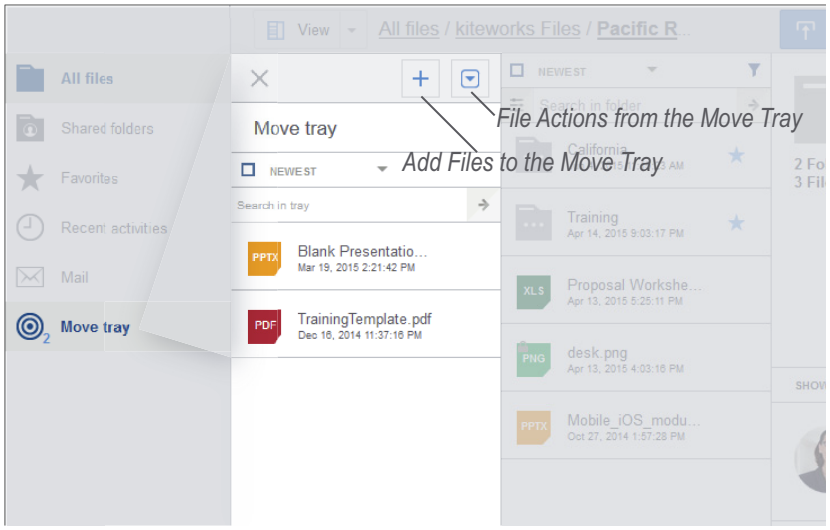
Note You cannot move locked files, but you can copy files that are locked.

Upload to the Move Tray

This procedure uploads files directly to the Move Tray. From there, you can move or copy the file to another location in **kite**works. Until the file is moved or copied to another shared folder, no one can access this file. For more information about the Move Tray, refer to The Move Tray.

To upload a file to the Move Tray, perform the following steps.

1 In the left Navigation menu, click Move Tray ( ). The Move Tray panel appears.



2 In the Move Tray panel, click the " + " icon and select **Add files**. The *Add new files to tray* window appears. From here, you can either:

- Drag the file(s) and drop into the window

  OR

- Click **Choose File**, which opens the *File Upload* dialog box of your operating system. From here, navigate to and select the file(s), and click **Open**.

3 Click **Add**. The file is now located in the Move Tray and can be copied or moved to another folder in **kite**works.

Caution If you clear the tray or delete a file without uploading the file to another location in the system, the file will be deleted from **kite**works. It is un-recoverable.

Download

To view or edit a file, you must first download that file to your desktop. This action extracts the file from the **kite**works server.

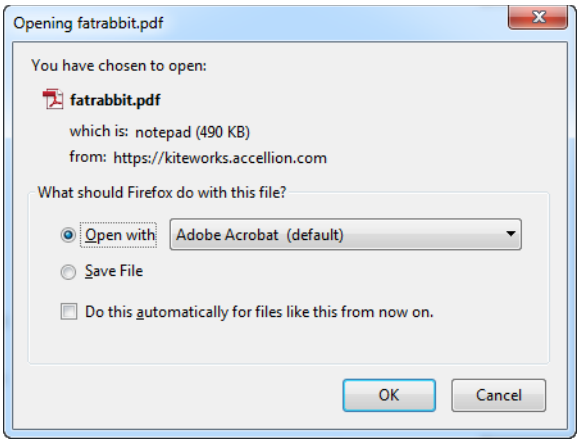
Note If your user role is set to View Only in a folder, you may not download the file and can only view the file using the Online Viewer

To download a file, perform the following steps.

1 Navigate to and select the file you would like to download.

2 In the upper-right corner of the screen, click **Actions** and select **Download**.

A window from your OS appears, prompting you to either directly open the file, or to save it to a particular location.

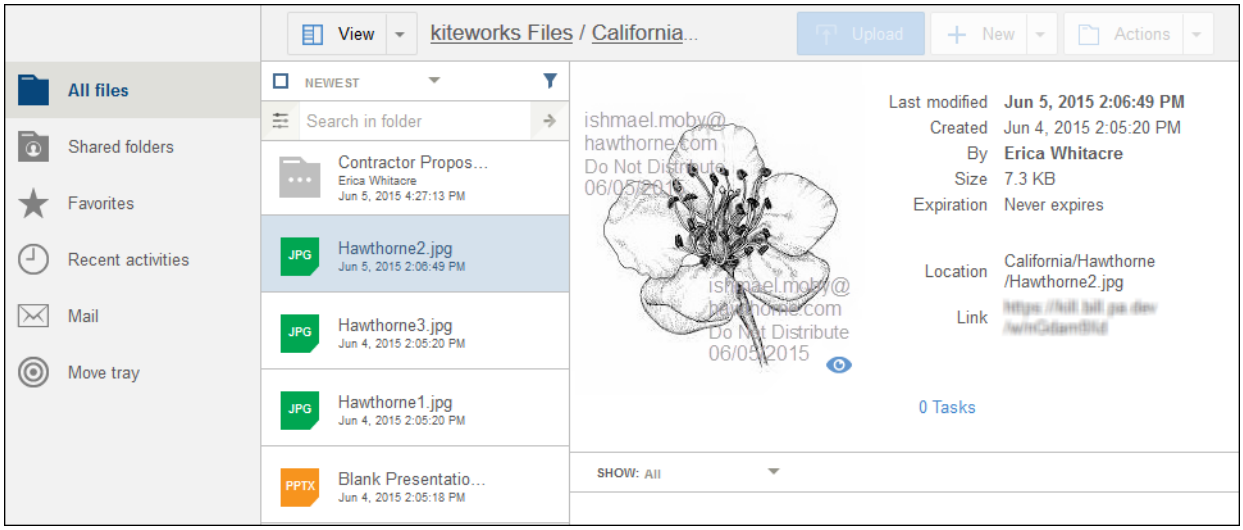


3 Select your preference using the radio buttons. If you choose to save the file, you will be prompted to specify where you would like the file to be saved.

4 Click **OK**. Your file is then downloaded to your system and opened using your specified program, or downloaded to your specified location.

Online Viewer

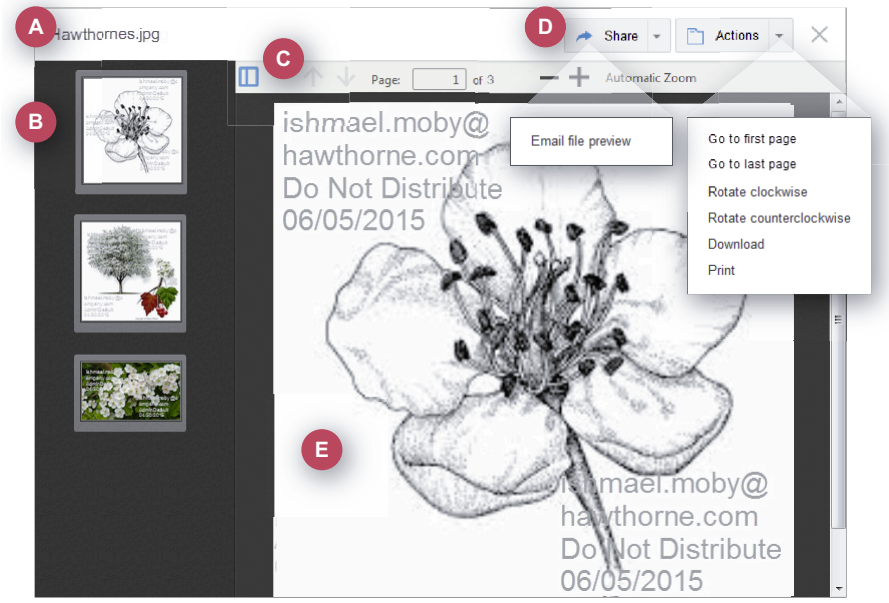
If you have a Viewer role in a folder, you cannot download any file from that folder. The only way you can view that file is to use the Online Viewer. If the user were to attempt to take a screen shot, the image becomes obscured.



Note You cannot use the Online Viewer on enterprise content files; this feature is only available for **kite**works files. For more information about enterprise content, refer to Access Enterprise Content Sources (License-Enabled).

Note Files larger than 25 MB or that take longer than one minute to render are not supported. To view this file, download it then open it. If you have a View Only role, contact the owner or manager of the folder to have him/her change your role.

To view the file using the Online Viewer, click the “eye” button in the lower-right of the thumbnail ( ). The file opens using the Online Viewer.



The specific sections of this screen are described in the following table.

Table 10. File Viewer

Identifier	Description	Notes
A	File Name	—
B	Sidebar	The sidebar shows a thumbnail of each page of the file.
C	Toggle Sidebar button	Click the Toggle Sidebar button to open or close the sidebar.
D	Share/Actions buttons	Allows you to perform the following functions: • Forward the file to another recipient.* • Go to First /Last Page • Rotate Clockwise/Counterclockwise • Download* • Print*
E	Watermark	If you are a “Viewer” of the file, the watermark of the email address of the person viewing the file and other text determined by your **kite**works Administrator appears. If you have any other role in the folder, the watermark doesn’t appear.

* Only available to users with Roles other than “Viewer”. If you are a Viewer, those options are grayed out.

Edit Files in Restricted Folders

To edit or update files in a restricted folder, Collaborators must use the kiteworks Web Editor. The integrated kiteworks Editor supports the following file types:

- Microsoft Word Files 97-2003 (*.doc) and 2007-2013 (*.docx)
- Microsoft Excel Files 97-2003 (*.xls) and 2007-2013 (*.xlsx)

- Microsoft PowerPoint Files 97-2003 (*.ppt) and 2007-2013 (*.pptx)
- Portable Document Format (*.pdf) - View and annotate only; you cannot create a PDF using the mobile editor.

Editing Microsoft Office Files in Restricted Folders with kiteworks Editor

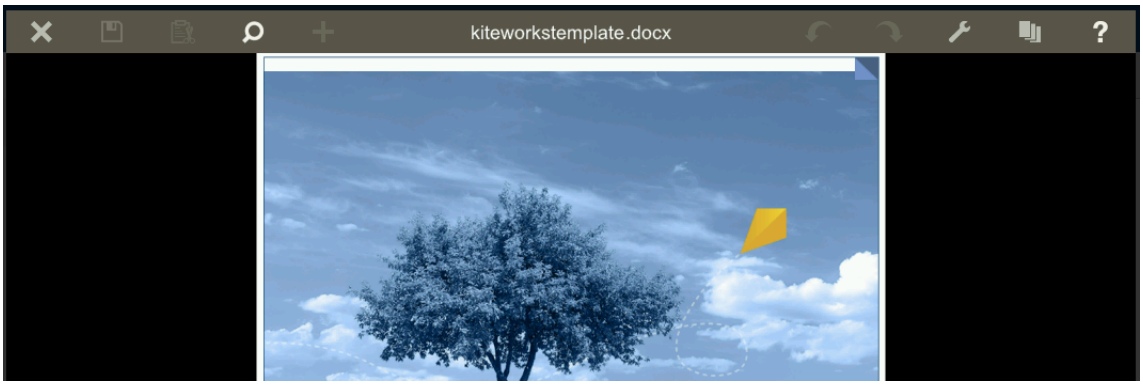
To edit documents using the **kite**works secure web editor:

1. Select the file name.
2. Tap the **Action** menu.
3. Select **Edit Content**. The file now opens in the secure web editor.

Note While the files is open, it will be locked for other users. When the file is saved, other users will be able to open and edit the file.

Understanding the Screen

At the top of the screen is the menu containing “global” options. IN the main part of the screen is your document, in which you select text, graphics, or enter new content.Options are grayed out if they are not available in your current state.



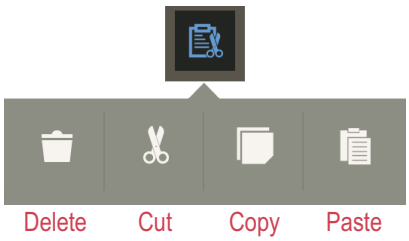
Top Menu Icons

The top of the screen shows icons for actions global to the whole document and application, not just to the part you are currently working with.

Close - Closes the file and takes you back to the **kite**works interface. If you have made changes in your document, you will be prompted to save your document.

Save - Saves your changes.

Cut/Paste - Brings up a menu to perform the following functions:



Search - Find a text string in the document.

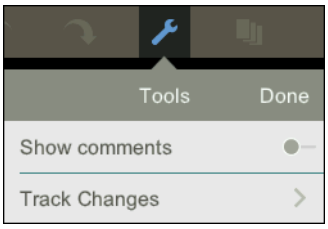
Add elements - Brings up a menu to add the following elements:

- **Shapes** - Lines, shapes, and callouts (not currently supported)
- **Image** - Images currently saved in your device
- **Photo** - Opens your camera to take a photo and place that photo directly into the document

Undo/Redo - After making a change to your document, you can undo (and later re-do) the action.

Tools - Opens a tools options menu with the following functions:

- **Show Comments**
- **Track Changes**



Editing and Formatting Microsoft Word Files

Files in Restricted Folders can be edited using the Secure kiteworks Editor.

1. Navigate to the restricted folder and select the Microsoft Word file for editing.
2. Under the **Actions** menu, select **Edit content**.
3. Click or double-click anywhere in the Word file to edit the content. To select a string of words, drag the round icons to highlight a selection. To move the highlighted text to another location, drag the “three bar” icon attached to the highlighted section to its new location. When you highlight a word, a formatting action bar appears above the selection:

Using this menu or action bar, you can perform the following functions:

- Bold, italicize, and underline
- Change font and size, color of the text, and background color (additional popup menus appear)
- Change alignment, make the selected area into a bulleted or numbered list, and change indentation (additional popup menus appear)

Editing and Formatting Microsoft Excel files

Spreadsheet files are shown with a “tab” for each sheet, displayed directly underneath the top menu. Click on a tab to switch to that sheet. Double-click on a tab to rename the sheet. Delete a sheet entirely by tapping the “x” icon in the tab, or add a new sheet by tapping the “+” icon on the right.

1. Navigate to the restricted folder and select the Microsoft Excel file for editing.
2. Under the **Actions** menu, select **Edit content**.

3 Click in a cell to select it for editing or formatting. When you highlight a cell or a group of cells, a formatting action bar appears above the highlighted area:

Using this menu, you can perform the following functions:

- Bold, italicize, and underline
- Change font and size, color of the text, and background color (additional popup menus appear)
- Change alignment of the cell
- Insert rows or columns
- Change the number format of the cell

Editing and Formatting Microsoft PowerPoint Files

The menus in the PowerPoint interface are very similar to the Word document. The differences in icons are listed below:

 **Slides**: Opens the Slide Sorter, which is a panel that shows thumbnails of each slide. In the slide sorter, click on a slide thumbnail to jump to viewing that particular slide.

 **Presentation Mode**: Switches the view to full-screen mode for presentations.

1 Navigate to the restricted folder and select the Microsoft PowerPoint file for editing.

2 Under the **Actions** menu, select **Edit content**.

3 Click or double-click a selection for editing or formatting. When you highlight the content, a formatting action bar appears above the highlighted area:

Using this menu or action bar, you can perform the following functions:

- Bold, italicize, and underline
- Change font and size, color of the text, and background color (additional popup menus appear)
- Change alignment of the line of text
-

Objects

Objects - shapes, impages, and photos - can be inserted and edited into a slide.

Insert Object

To add a new shape to a PowerPoint presentation, click the **Add** button on the top menu. The Add menu appears. You can add shapes, objects, or images. Select the object to insert into the presentation. It then appears in the presentation with handles surrounding it.

Edit Object

While a shape is selected, the action bar or call out menu shows options for adjusting the line type (solid, dotted, or other), line color and opacity, line thickness, fill color and opacity, and arrangement of objects on a slide.

Edit Portable Document Format (PDF) Files

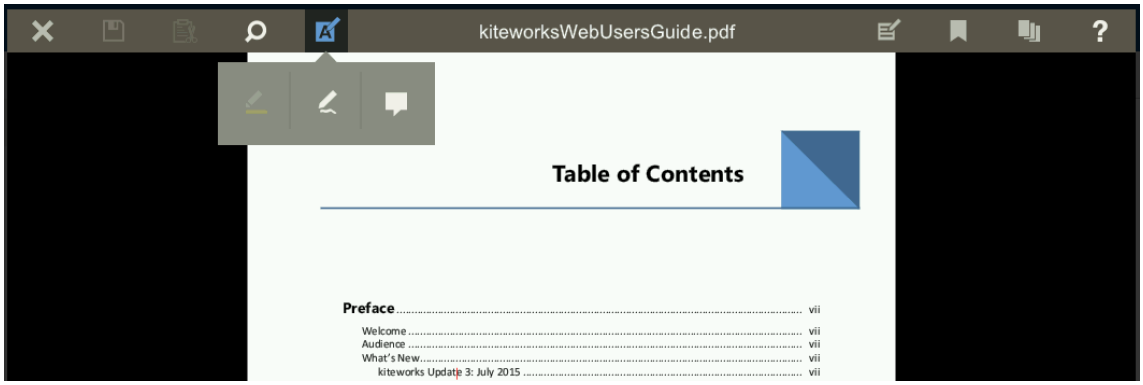
Key functions of the kiteworks PDF annotation feature includes the ability to:

- Annotate PDF files with highlights, notes, and shapes.
- Search the PDF file for words or phrases.
- Show, add, and delete bookmarks in the PDF file.

Adding Annotations

To add an annotation to a PDF file, perform the following steps.

1. Open the PDF file using kiteworks secure web editor.
2. On the top of the screen, click the Add Annotation icon. The Add menu appears with the three types of annotations: highlighting, freestyle line, or comment.



Highlighting: You must select the text before you select the highlight icon. When you tap the highlight icon, the selected text is highlighted in yellow.

Freestyle Line:

a. Select the Freestyle line icon. A new menu appears in the upper left corner of the screen:

This menu allows you to change the color of the line, the thickness of the line, and to accept or delete your annotation.

b. Draw your line and adjust the color and line thickness by scrolling through the menus.
c. When you are satisfied with your line, tap the checkmark. The line is not affixed to the file.
d. To discard your line, tap the “x”.
e. To add a comment to your line, double-tap the annotation. A comment field appears.
f. Type in your annotation and when complete, tap away from the field.

Comment:

a. Tap the “Add” button.

b. Drag the Comment icon onto the page. A comment “ghost” appears where you drag.
c. When you let go of the ghosted icon, it turns yellow.
d. Tap in the comment icon. An empty comment box appears.
e. Double-tap in the comment box. The comment window appears. Type your comment. When finished, tap **Done**.
f. Tap away from the text box. The comment is now affixed to the file and identifies you as the one who wrote it and the time that it was written.

Annotation List

To view a list of the annotations that have already been made on the file, click the Annotation button. A panel with the list of annotation appears, including the type and content of the annotation, who made the annotation, and when the annotation was made.

Click an annotation to navigate to the location of the annotation.

a. To delete an annotation, click **Select**. A selection bullet appears next to each item.
b. Click the radio button to select the annotation(s) to delete. You can also select **All**.
c. With the annotation(s), selected, click **Delete** or sweep to the left.

Bookmarks

To view the bookmarks that currently exist in the file, tap the bookmark icon in the Navigation Bar.

To view nested bookmarks, tap the triangles to collapse or expand the headers.

To add new bookmarks to your file, perform the following steps:

a. Navigate to the destination to which you would like the new bookmark to appear.
b. Click the **Add Bookmark** button. You are prompted to enter a name for the new bookmark.
c. Click **Done**. The new bookmark appears in the list of bookmarks.

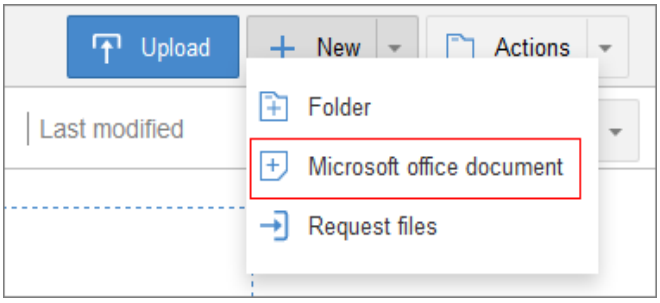
Desktop Office Integration with kiteworks Web

kiteworks provides an ability for its users to open, edit, and save **kite**works files directly from the Web using Desktop installed applications, such as Word, Excel, Powerpoint, etc.

This feature is available for both Mac and Windows platforms.

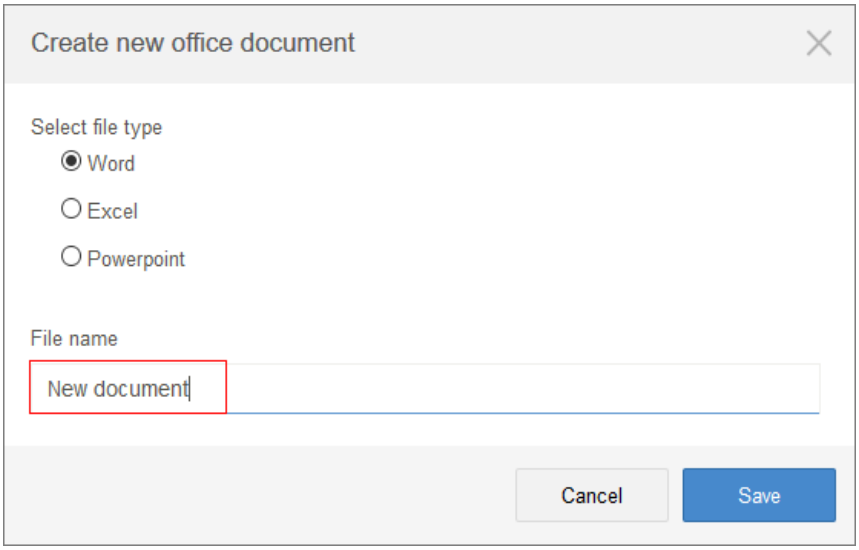
Ability to Create New Files

In **kite**works Web, go to the folder where you want to create a new file, click on + New and select an office application.

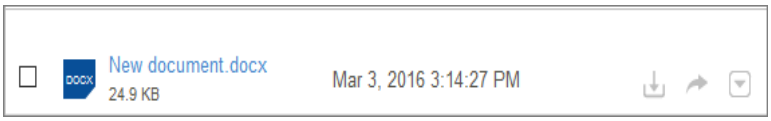


Note Web application will detect whether you have the Desktop Client installed. If not, you may be prompted to download it.

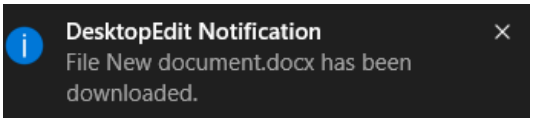
If all criteria are met (desktop client is installed, appropriate office application is available), you will see the screen where you will be asked to enter the name for your new file.



Click Save and the new file will be created.

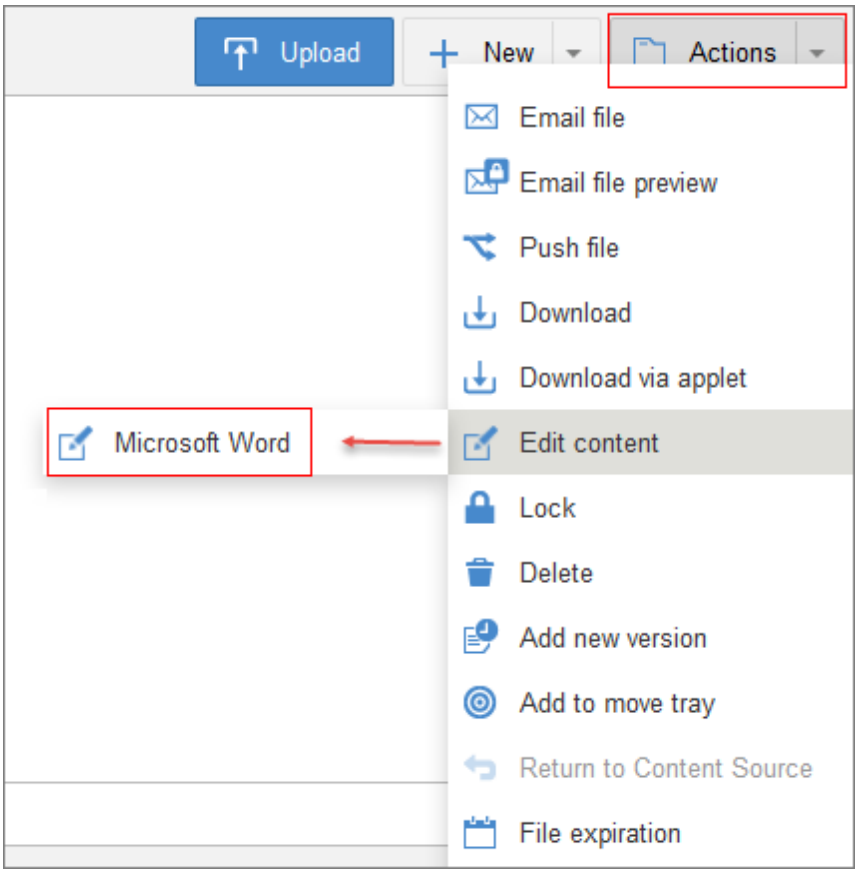


You will also receive a notification from your desktop client that a new document has been downloaded.



Editing an Existing File

Go to the file that you wish to edit and select your office application from the Actions tab > Edit Content.



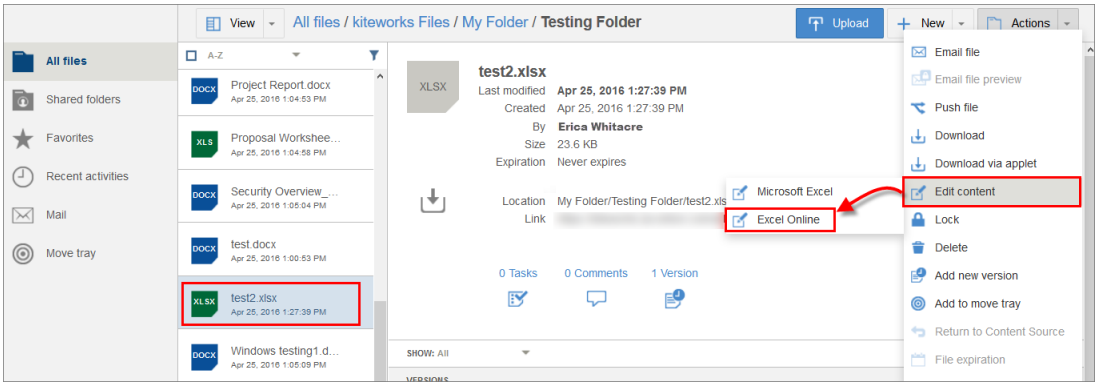
If all necessary criteria are met, your selected document will open for editing.

Microsoft Office Web Application (OWA) Integration

kiteworks users have the ability to open, edit, and save back their Microsoft Office documents with Microsoft Office Web App (OWA).

1 Go to the file you wish to open, click **Actions**.

2 Select **Edit content**, and the Microsoft Office Application Online.



3 The document will open for editing.

Note This feature is only available for those users who have Office 365 installed on premises, or have O365 subscription. Therefore, you may be asked to log in into your Microsoft account to proceed.

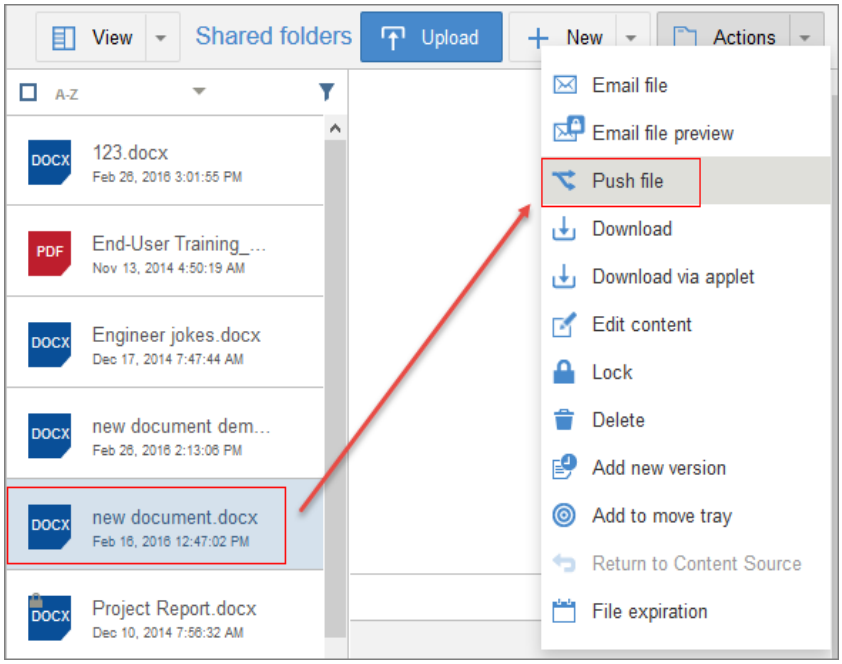
Push File

A folder Owner of Manager can push the latest version of a file out to users with mobile devices, making it available for viewing and editing online.

All changes made offline will apply once the device goes back online. The next time a user logs into the kiteworks mobile application, the latest version will be synced to their mobile device.

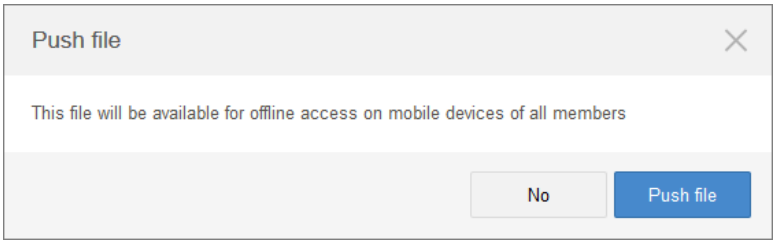
To push a file:

1 Navigate to the folder in which the file(s) resides.



2 Click on the 'Actions' drop-down button and select Push file

A confirmation window will appear. Click **Push file** if you want for it to download locally onto all devices synced with this **kite**works folder, and be available to all affiliated members. Otherwise, click **No**.



If a new user is added or an existing user has been upgraded from Viewer in the folder with previously pushed files, then these files will automatically get pushed to that user's devices.

Those users who were added or whose role was changed, will get an email with respective notification that the files have been pushed to them.

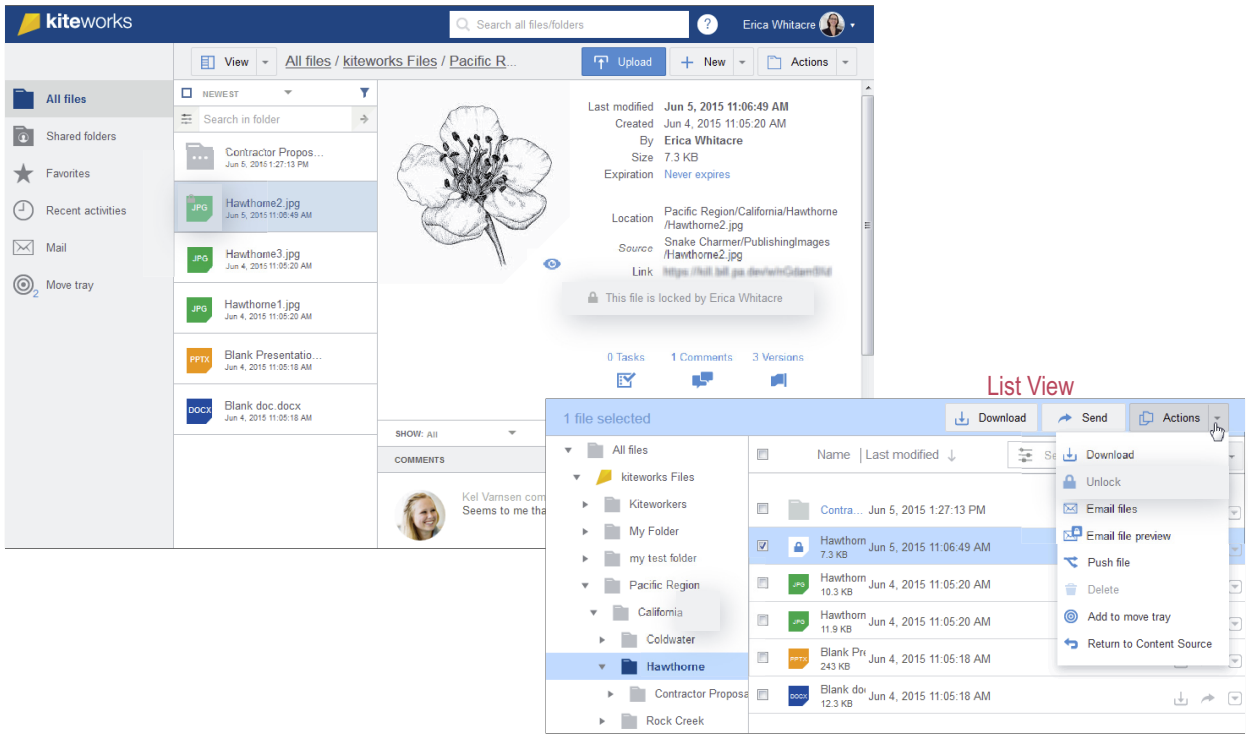
Lock/Unlock

You can lock and unlock files so others cannot edit and re-upload the file while you work on it. When a file is locked, other users sharing the folder cannot delete or update that file. They can, however, download and comment on the file.

A locked file can be unlocked only by the user who locks it, or by the folder's Owner or Manager.

To lock a file, with the file selected, click **Actions**, and select **Lock** ( ). The file is now locked, with indicators as such on both views of the file. Only you can upload a new version of the locked file.

Detail View



List View

Note A locked file does not become unlocked automatically when you upload a new version of the file. When you upload a file that you have locked, you must explicitly unlock it for others to be able to update it.

To unlock a file, from the Actions drop-down menu, click **Unlock** ( ). The file is now unlocked and can be updated by other users.

Delete and Recover a Deleted File

You can delete a file from a folder if you are an owner, manager, or collaborator in that folder. If the file is deleted accidentally or the file expires, you may be able to Recover a Deleted or Expired File.

Delete a File

To delete a file, perform the following steps.

1. To delete a file, with the file selected, click **Actions** and select **Delete** ( ). A confirmation window appears.
2. Click **Yes**. The file has now been deleted from **kite**works.

Recover a Deleted or Expired File

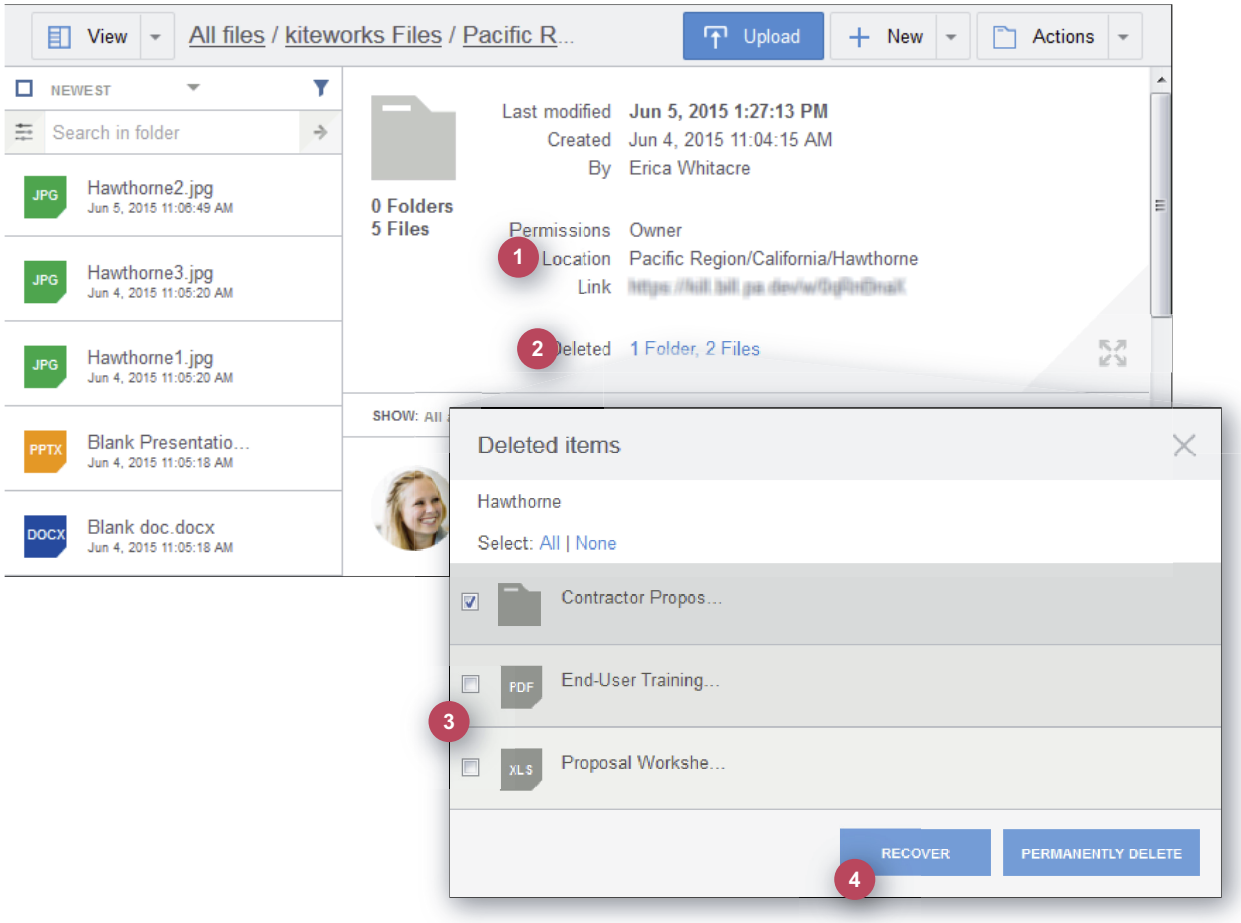
If you have deleted a file accidentally or the file expires (refer to Change File Expiration Date), you may be able to recover that file.

Depending on whether you prefer to work in the detail view or the list view, follow the steps below.

Note File recovery is not supported for enterprise content sources. If you move a file out of an enterprise source and wish to recover the deleted file, you must go to the source to retrieve it.

Detail View

To recover the deleted file, perform the following steps using the detail view.



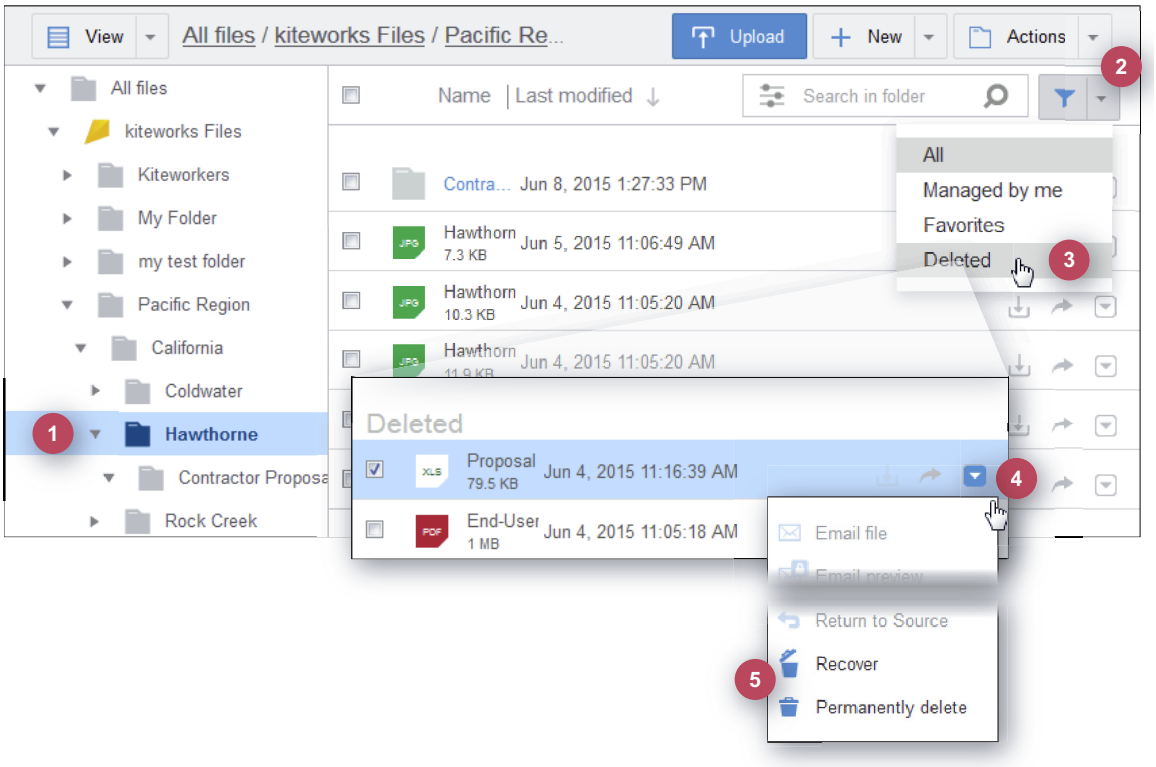
1. Navigate to the folder from which the file was deleted. Deleted files and folders are listed in the information section of that folder.
2. Click the listed deletions in the details about the folder.
3. Select the file(s) or folder(s) that you would like to recover.
4. Click **Recover**. The item re-appears in the folder.

If the file had expired and you recover the file, the new expiration date is the default that has been set by your administrator. It would be as if you uploaded the file as a new file.

You have 14 days to recover your file. Your **kite**works Admin can change that default, however. For more information about recovering deleted files, contact your Admin.

List View

To recover the deleted file, perform the following steps in the list view.



1. Navigate to the folder in which the file was deleted.
2. Click the Filter icon ( ). A list of possible ways to filter the contents of the folder appears.
3. Select **Deleted**. A list of deleted items appears.
4. Click the downward arrow ( ). A list of file actions appears.
5. Click **Recover** ( ). The file re-appears in the folder.

If the file had expired and you recover the file, the new expiration date is the default that has been set by your administrator. It would be as if you uploaded the file as a new file.

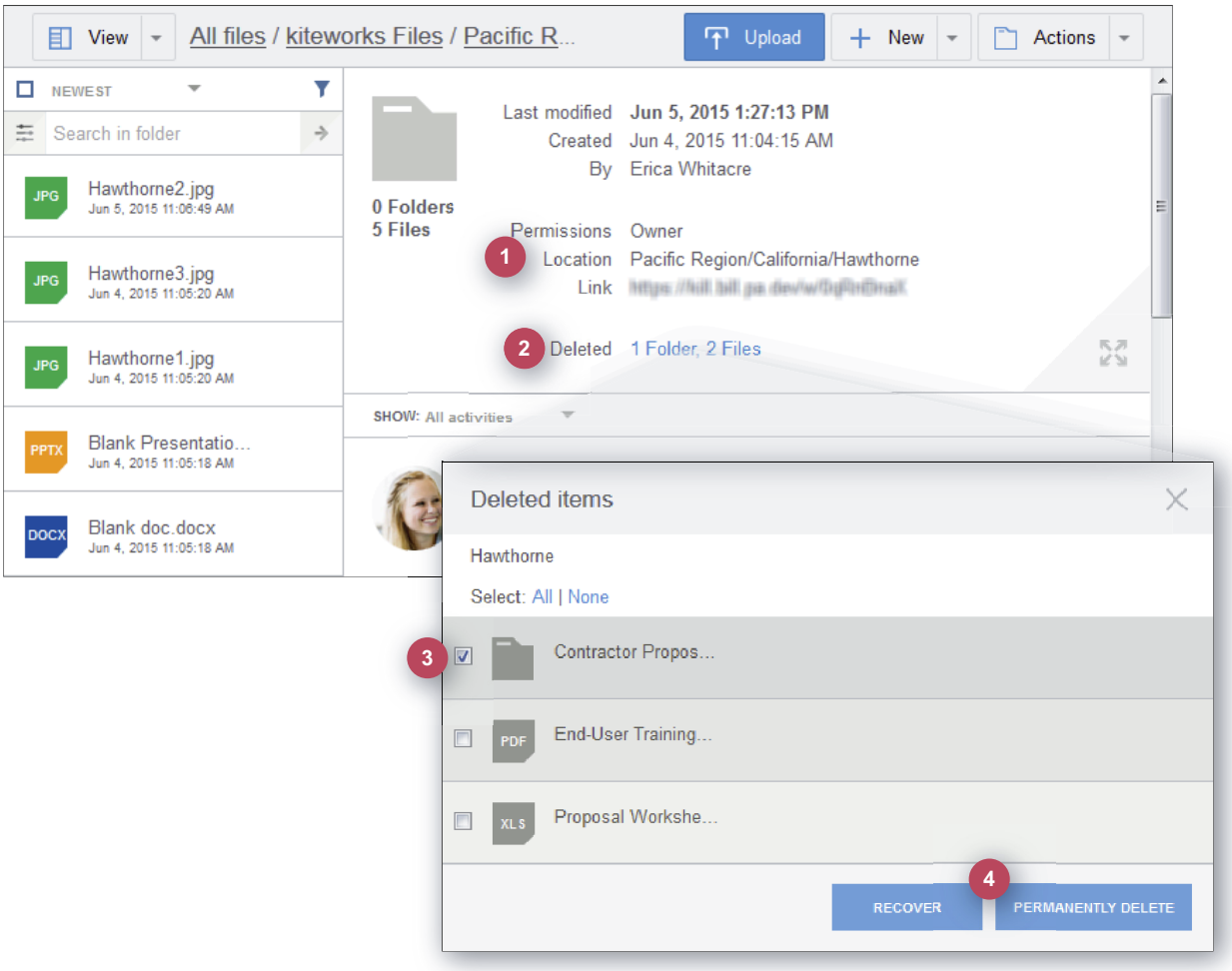
You have 14 days to recover your file. Your **kite**works Admin can change that default, however. For more information about recovering deleted files, contact your Admin.

Delete a File Permanently

To increase your storage in a folder, delete files or folders permanently. Depending on whether you prefer to work in the detail view or the list view, follow the steps below.

Detail View

To delete a file permanently, perform the following steps.

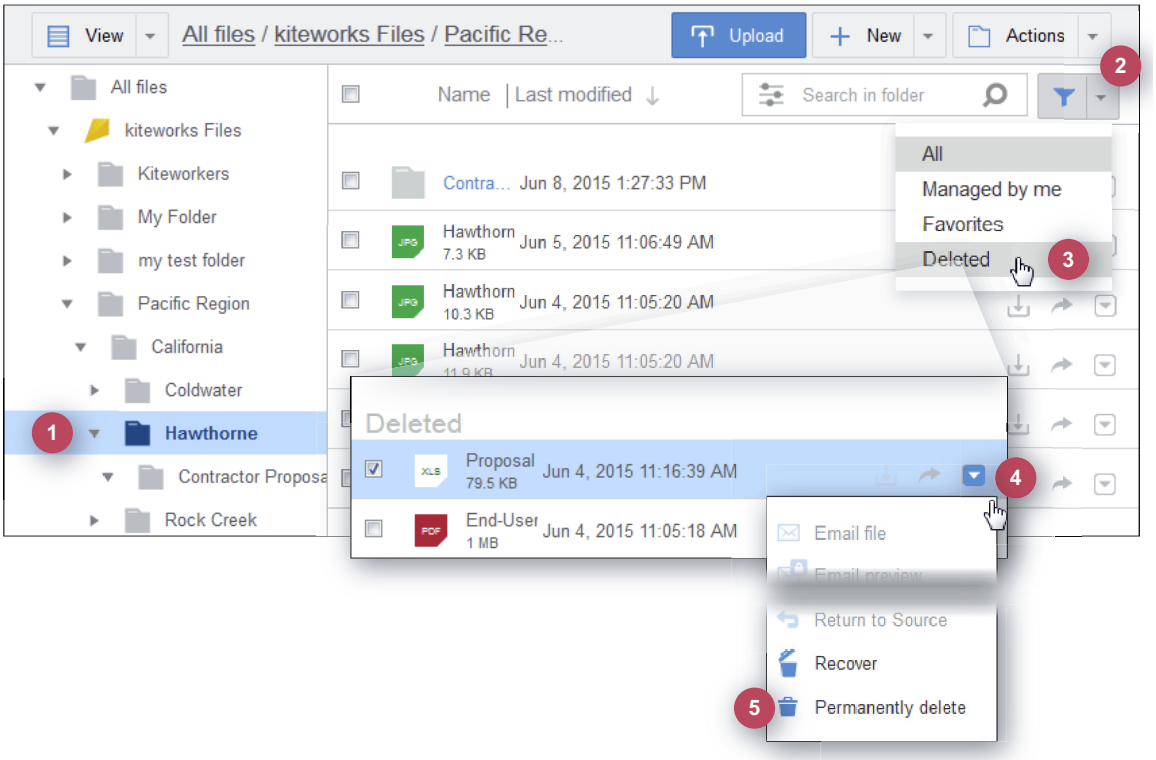


1. Navigate to the folder in which the file was deleted. Deleted files and folders are listed in the information section of that folder.
2. Click on the listed deletions in the details about the folder.
3. Select the file(s) or folder(s) that you would like to delete permanently.
4. Click **Permanently Delete**.

After a confirmation message appears, file or folder is now deleted and not recoverable. It is also now removed from your storage quota.

List View

To delete a file permanently, perform the following steps.



1. Navigate to the folder in which the file was deleted.
2. Click the Filter icon ( ). A list of possible ways to filter the contents of the folder appears.
3. Select **Deleted**. A list of deleted items appears.
4. Click the downward arrow ( ). A list of file actions appears.
5. Click **Permanently delete** ( ).

After a confirmation message appears, file or folder is now deleted and not recoverable. It is also now removed from your storage quota.

View and Change Versions

You can perform three actions on versions of a file: Download Version, Make Current, and Delete Version. If you have the proper permissions in a folder, you can also upload or Add New Version of a particular file into that folder.

Figure 1. Detail View

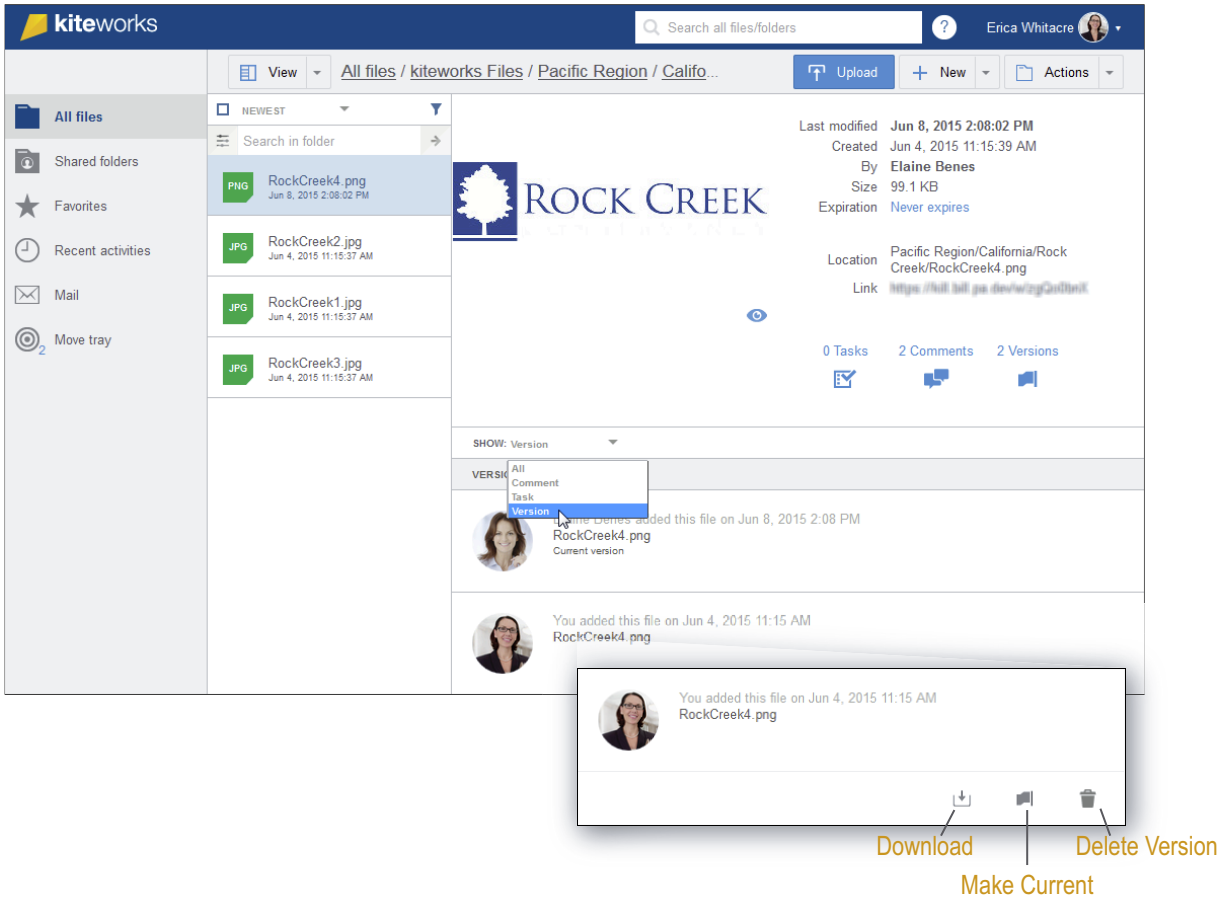
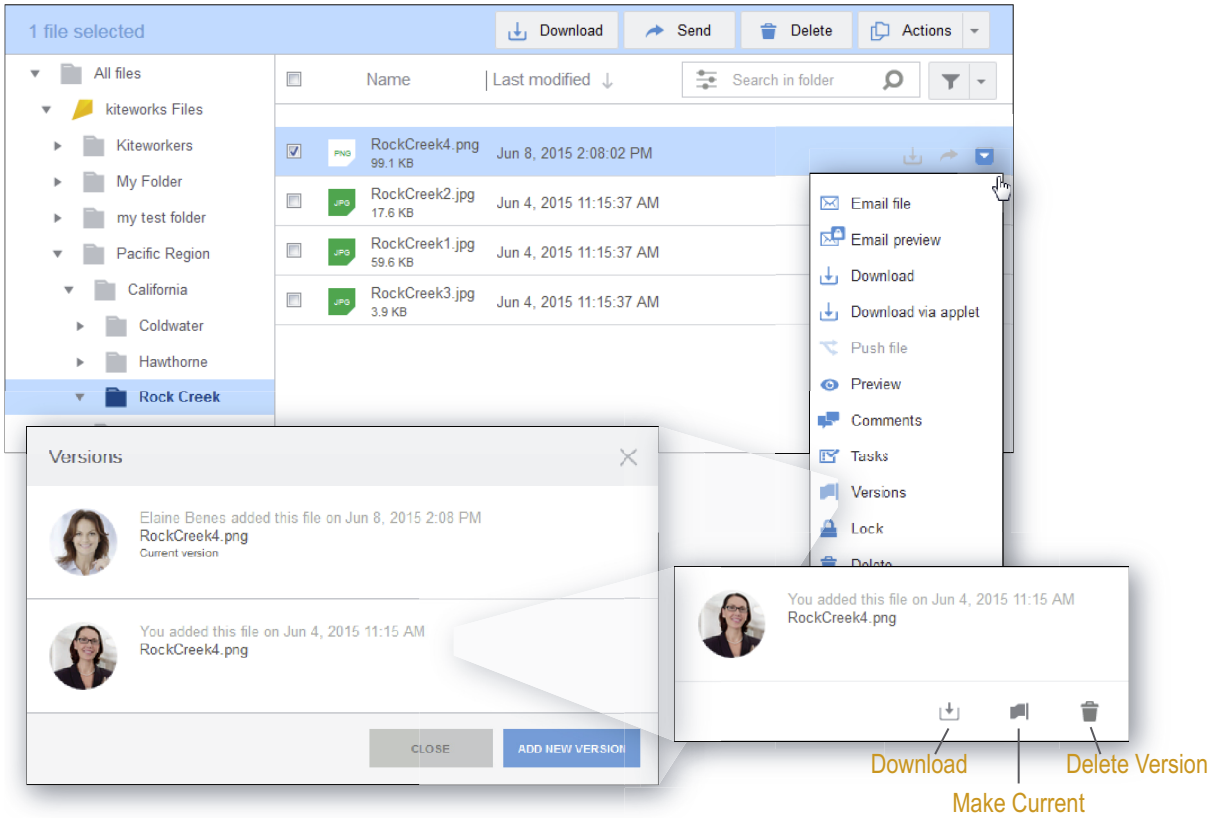


Figure 2. List View



Download Version

To download a previous version of the file, click the download icon for the version you would like to download. You are then prompted either open the file using a particular program, or to save the file to a particular folder.

Make Current

To make a previous version of the file into the current version, click the flag icon. This does not discard the newest version, but makes the selected file the current version. The other versions are still accessible to other users, should they wish to see them.

Delete Version

To discard a version of the file, select the version of the file you wish to delete and click the “remove” icon. A confirmation window appears. Confirm that you would like to delete that version, and the file is deleted. It will not be available for others to view.

Add New Version

To add a new version of an existing file, perform the following steps.

1. Select the file that has a new version to be uploaded.
2. Click the Actions button, and select **Add new version** ( ). The *Add new version* menu appears.
3. Click **Choose file**. The *File Upload* menu appears.
4. Navigate to the new version of the file that is saved on your system.

Note The new version does not necessarily have to have the exact same name as the file currently existing in **kite**works.

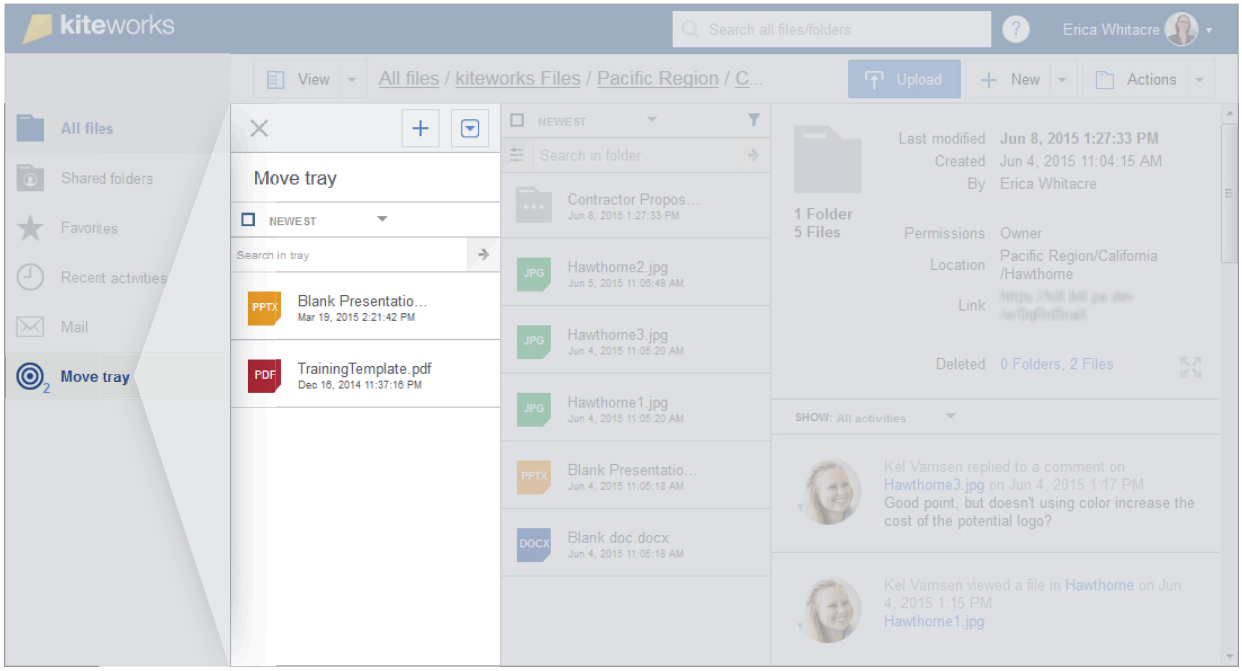
5. Click **Open**.
6. Click **Add**. The file is now uploaded and is the new current version.

Caution If you upload a file with the exact same name as a file already existing in that folder, the file replaces the current version with the one you have just uploaded. The file is not overwritten, as collaborators, managers, and the owner still have access to previous versions of the same file. To undo this action, Make Current the previous version.

The Move Tray

The Move Tray is a staging area for moving files within **kite**works. To move files in **kite**works, drag the file(s) into the tray, and from the tray, drag to a new location.

Click the Move Tray icon in the navigation panel. The Move Tray column appears.



Move Tray Actions: Copy and Move

When you **move** a file to another folder, the file history and comments move with the file. The file is deleted from the tray *and* from its original location when the move is completed.

Note When you move files specifically from a Dropbox source, they are deleted from the source and moved from the Move Tray to the location you specify. Previous versions and comments and tasks associated with the file are deleted.

When you **copy** a file to another folder, the copied file does *not* retain its history or comments. It remains in its original location *and* in the tray.

To move or copy files, perform the following steps.

1. Add the file to the move tray. There are three ways to put a file into the Move Tray:
   a. Drag the file from its current location (either on your desktop or within **kite**works) into the open Move Tray or onto the Move Tray icon on the navigation panel.

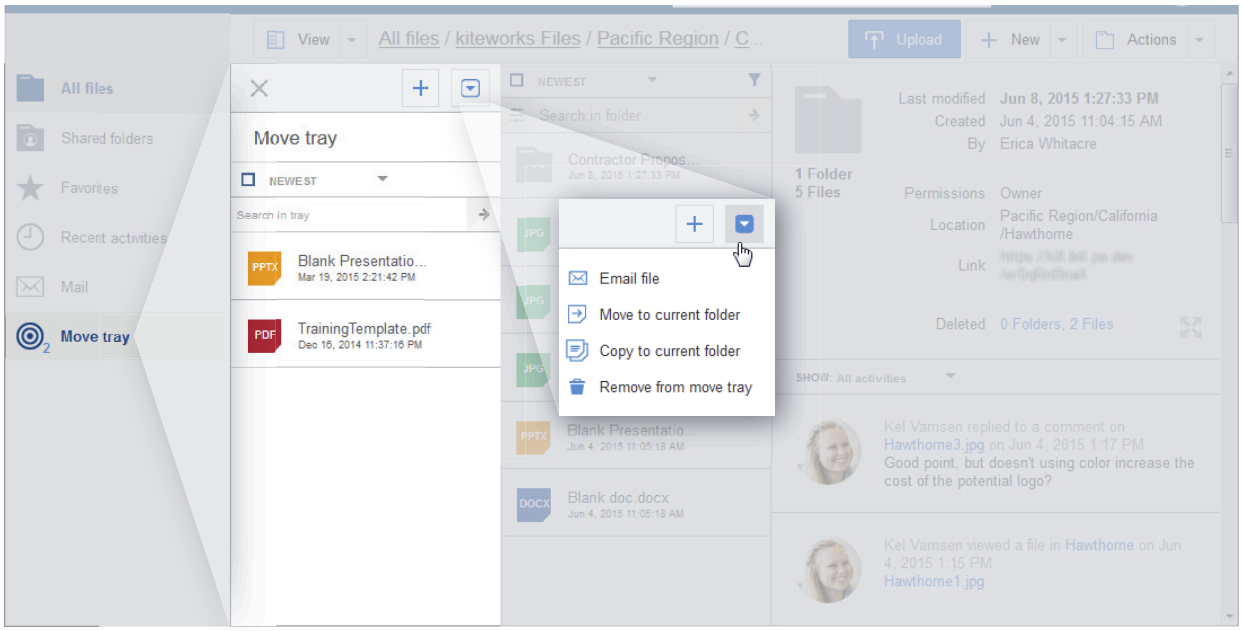
      OR

   b. Select the file in **kite**works, and from the Actions menu, select **Add To Move Tray**.

      OR

   c. In the Move Tray, click the *Add new* icon (+) and select **Add files**; then navigate to the file location and add the file to the Move Tray.

   When the file has been moved to the Move Tray, a small numeral appears with the Move Tray icon in the navigation panel. This indicates the number of files that currently exist in the Move Tray.
2. Navigate to the folder location where you would like to move the item.
3. In the Move Tray, select the file(s) to be moved.
4. At the top of the gray Move Tray menu, click the Actions icon ( ). A list of actions you can perform on those file appears.



5. Click the action you wish to perform. (Note that you can email a file directly from the Move Tray. For more information, refer to Email a File.)

Note To close the Move Tray, click the " × " in the left corner of the tray, or click the move tray icon ( ) in the navigation panel.

Upload Files Directly to the Move Tray

You can upload files directly to the Tray from your desktop. To do this, drag the file from your desktop to the Move Tray.

Until the file is moved or copied to another shared folder, no one can see the file in your Move Tray.

The size of these files counts against your total quota allowed in **kite**works.

Caution If you clear the tray or delete the file without uploading it to another location in the system, the file will be deleted. It is un-recoverable.

Use the Move Tray to Collaborate with Outside Users on Enterprise Content Files

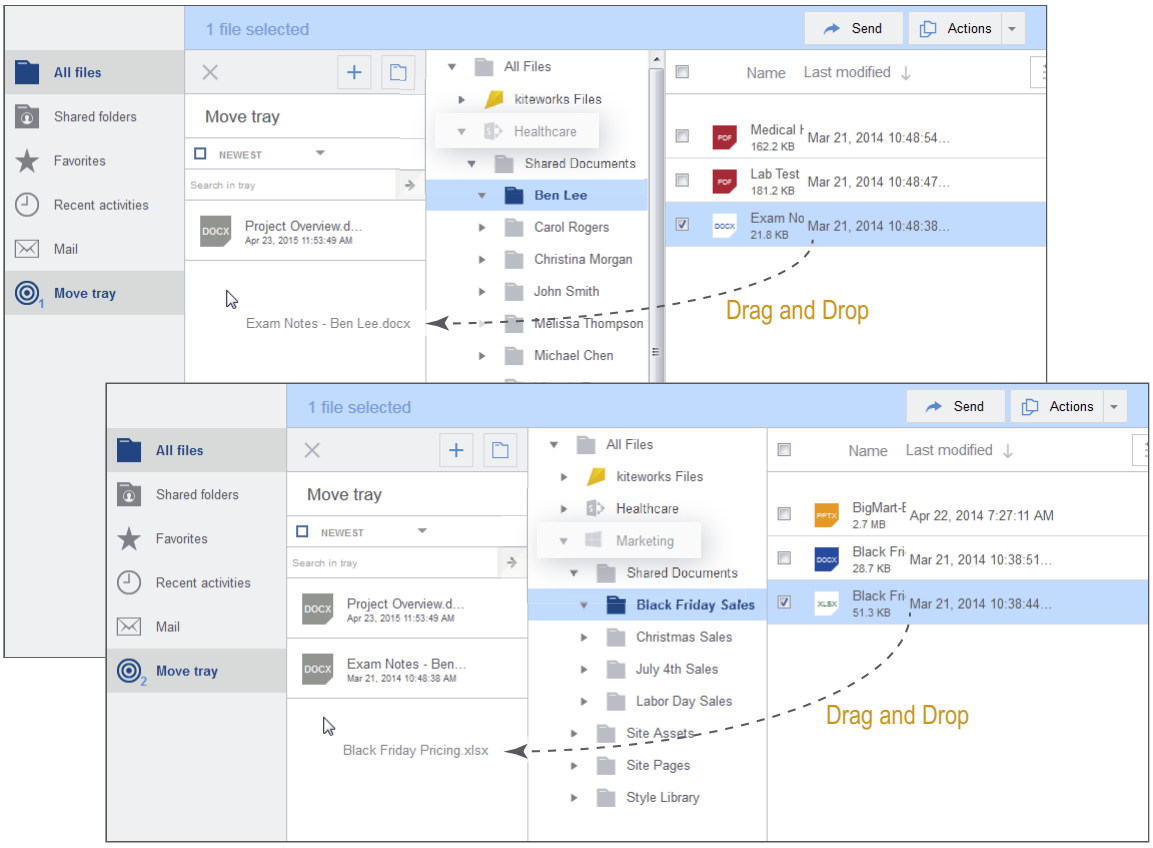
The Move Tray can be used to collaborate on files pulled from multiple enterprise content sources: SharePoint, Windows File Shares, etc. You can consolidate files from many content sources into the Move Tray, then move the files to a Shared Folder to simplify collaboration.

You can also email multiple files from multiple sources in a single email using the Move Tray.

For more information about enterprise content collaboration, refer to [Access Enterprise Content Sources (License-Enabled)](#).

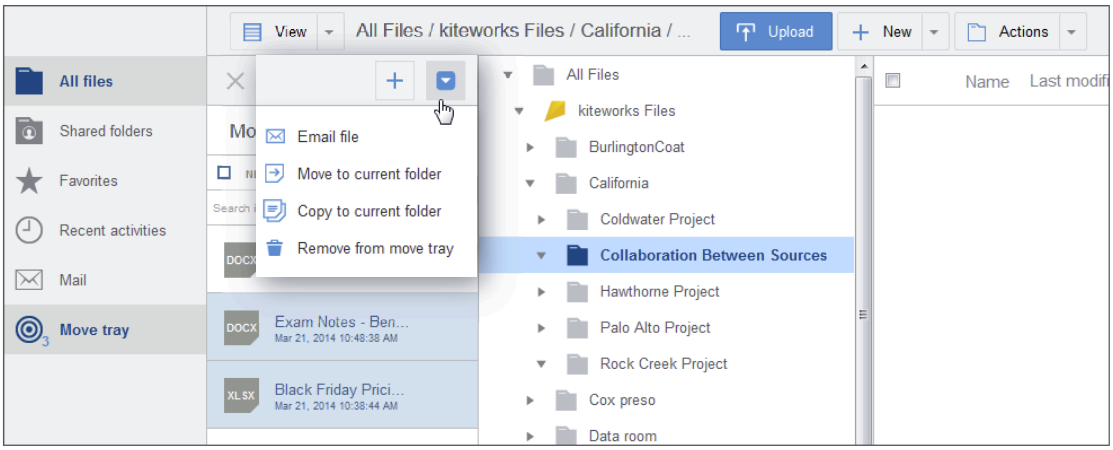
To use the Move Tray to collaborate on files from multiple enterprise content sources, perform the following steps.

1. Add files from your source to your move tray.



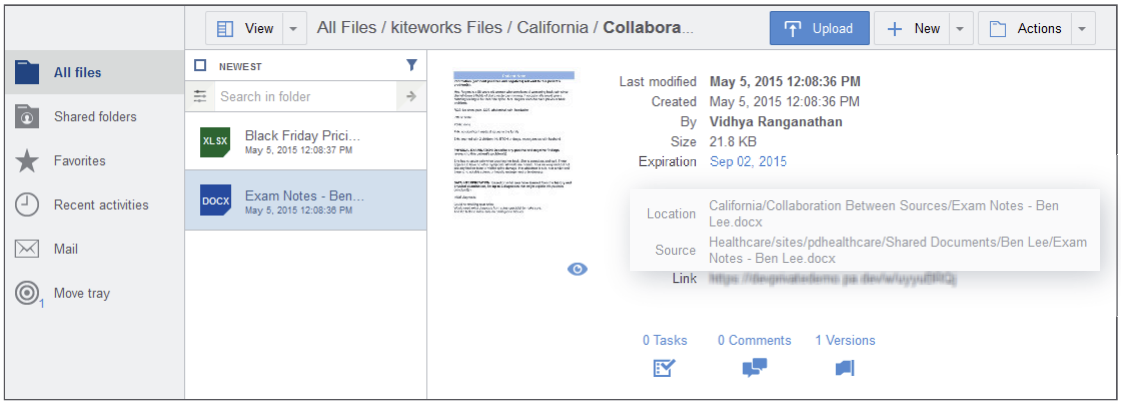
2 In **kite**works files, create a new folder or navigate to an existing folder to which you invite users (refer to Create a New Folder and Share Access to a Folder).

3 Copy the files from your Move Tray to the new folder (refer to Move Tray Actions: Copy and Move).



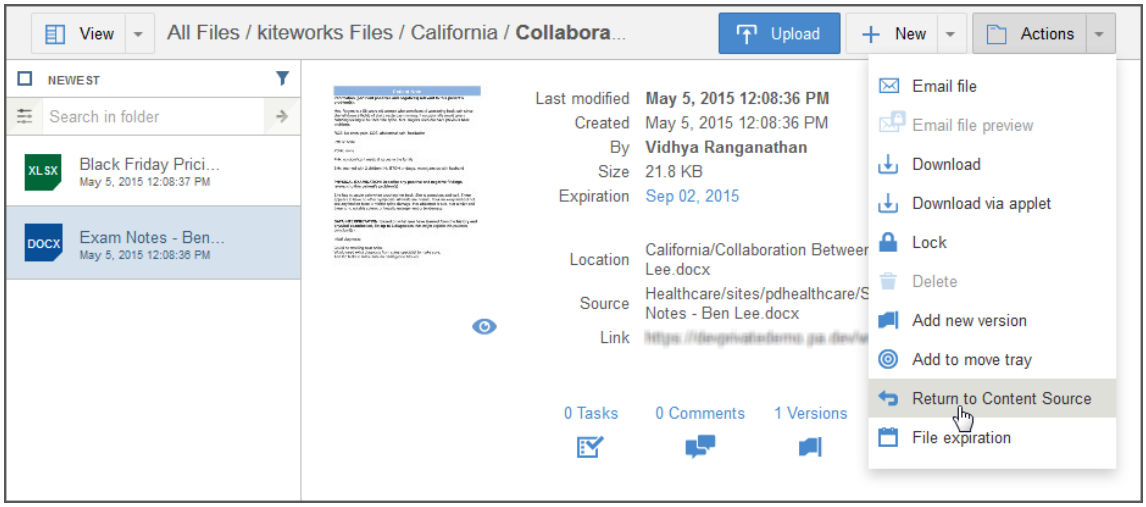
Note If the source of the file is Dropbox, you are shown the option of moving the file in addition to copying it. If you select **Move**, a confirmation message appears.

In the detail view, you are shown the source of the file in addition to its current location.



4 Perform your collaboration with subscribers to the folder you have created.

5 When collaboration is complete, upload the files back to the source location (click **Return to Content Source** from the Actions menu).



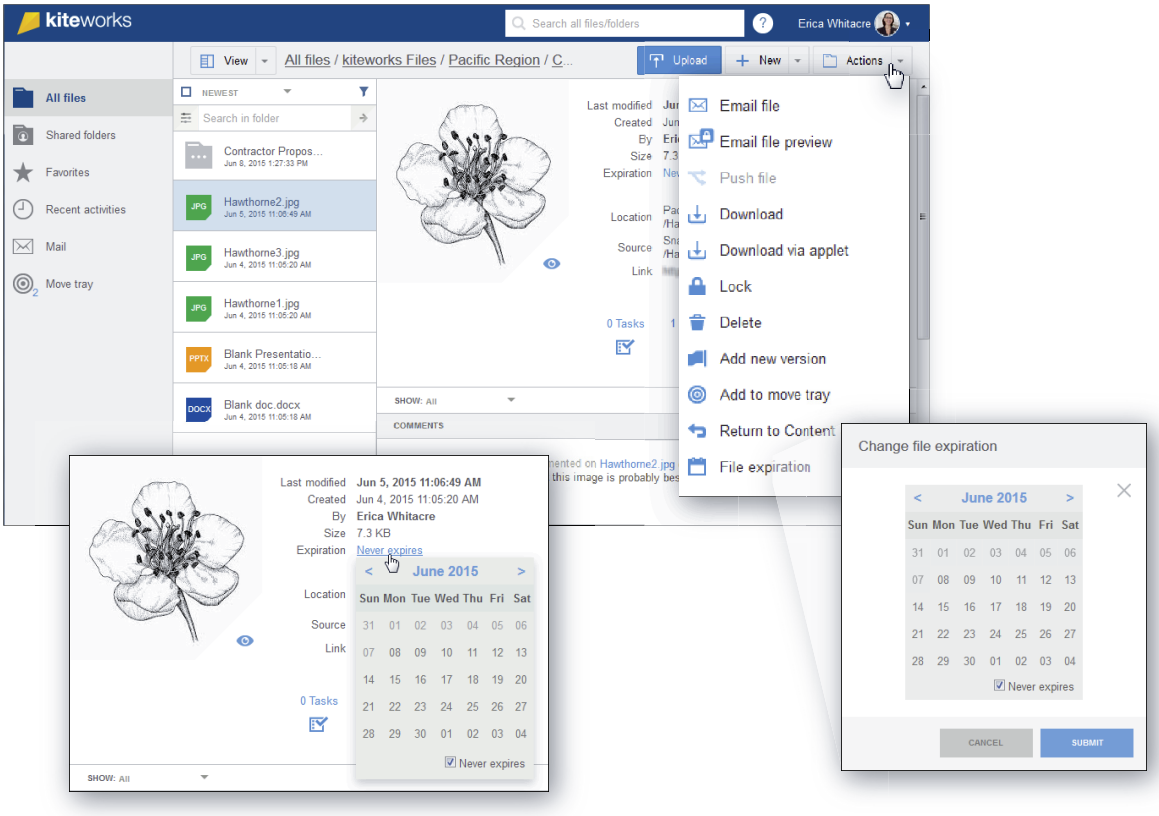
Note If the original source was from Dropbox and you **moved** the file instead of **copying** the file, the "Return to Content Source" action will not be available. The action of moving the file from the Move Tray deleted the file from the source. In this case, upload the edited file directly back to Dropbox.

Change File Expiration Date

An expiration date for a file is the date at which the file will cease to exist in a folder and will appear as a deleted file.

Users with an Owner or Manager role in a folder can change the date or expiration status of a file. Depending on your Administrator's settings, users with a Collaborator role may be able to extend the expiration date of a file. All users can view the expiration date of a file.

1 To change the expiration date for a file, click the Actions button and select **File expiration,** or, on the detail view, click the expiration date. A calendar window appears.



2 Select the new expiration date.

3 Click **Submit**. The updated expiration date changes.

Note You cannot set the file expiration past the folder expiration date, which is set by the creator of the folder, or owner. To change the folder expiration date, refer to Edit Folder Properties and Mark a Folder as Restricted.

Depending on your Administrator's settings, you may be able to Recover a Deleted or Expired File.

Mail

You can Email a File from **kite**works to another user. Instead of attaching the file itself to the email, **kite**works adds a link to the file and puts it in the email. When the recipient receives the email, s/he clicks the link and downloads that file to his or her own system.

You can also Email a Preview of a File, which means that instead of sending a link to a downloadable file, you send a link to a view-only version of the file that cannot be edited.

When you send or receive a file, send a file preview, or save an email draft, that activity appears in the folder using the detail view.

To find out more information about the mail or to download, resend, or withdraw a file that was emailed, click the mail as shown above. The options available to you then appear.

Note If attached files are updated before the email is sent or re-sent, the file that is sent is the one that originally was attached to the email. The updated file is **not** sent automatically.

If you have saved a draft, click the activity, and you are given the option to either **edit** the email or **delete** the draft.

When you withdraw a file, the activity still appears in the Activity stream, but the link to the file is grayed out.

What is the difference between sending a file and sharing a folder?

When you **share a folder**, you allow other users to access the files within that folder, the extent to which depends on the permissions (Roles) you assign to each user. However, you cannot specify individual roles for a single file within a folder. All files in the folder are shared according to each user's assigned role.

When you **send a file**, you email that file to the recipient, regardless of whether they have access to the folder in which it resides.

For more information about sharing a folder, refer to Share Access to a Folder. For more details about user roles, refer to Roles.

Why would I want to send a file or file preview over sharing a folder?

Suppose you have a single file that you would like to share with an individual, but do not want to give that person access of any kind to the folder in which that file resides. In this case, you would want to email the file. The recipient receives the email from you with a link to the file, which the recipient can use to download or view the file.

Whether you send the file or file preview depends on how much control you would like the recipient to have over that file (download, forward, print, edit, etc.). If you want the recipient to do anything other than view the file, send the file. Otherwise, send a file preview.

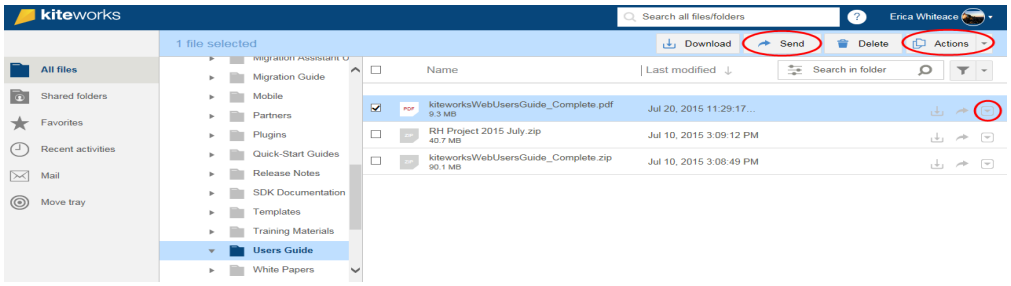
Email a File

To share a single file with another individual, email the file via **kite**works. These files are downloadable by the recipient, and the recipient can edit and distribute that file without regard to the file's original security level.

To send — or email — a file, perform the following steps.

1. Navigate to the file and select it in the right navigation pane.
2. Using one of the three methods below**:**

- click the **Send** button on the top navigation bar, or
- click the **Actions** button on the top navigation bar and select **Email files** from the Actions right-click menu, or
- click the **More** icon for the file and select **Email file** from the More menu



3. Fill in all of the fields.

   To send the file to multiple recipients, separate email addresses with a semicolon.

   If the link at the bottom of the **Email File** screen is a live link, you can set Security Settings for your recipient(s). You have two options:

   - **Only listed recipients**: Recipients cannot forward files to others. (This is the default.)
   - **Anyone - no authentication required**: Recipients can forward files to others.

   To add additional files to the email, perform the following steps.

   a. Select the location of the file as follows:
   - To add files from your desktop, click **Add files** and select **Upload local file**.
   - To add files from **kite**works, click **Browse kiteworks**.

   b. Navigate to the location of the file to add to the email.

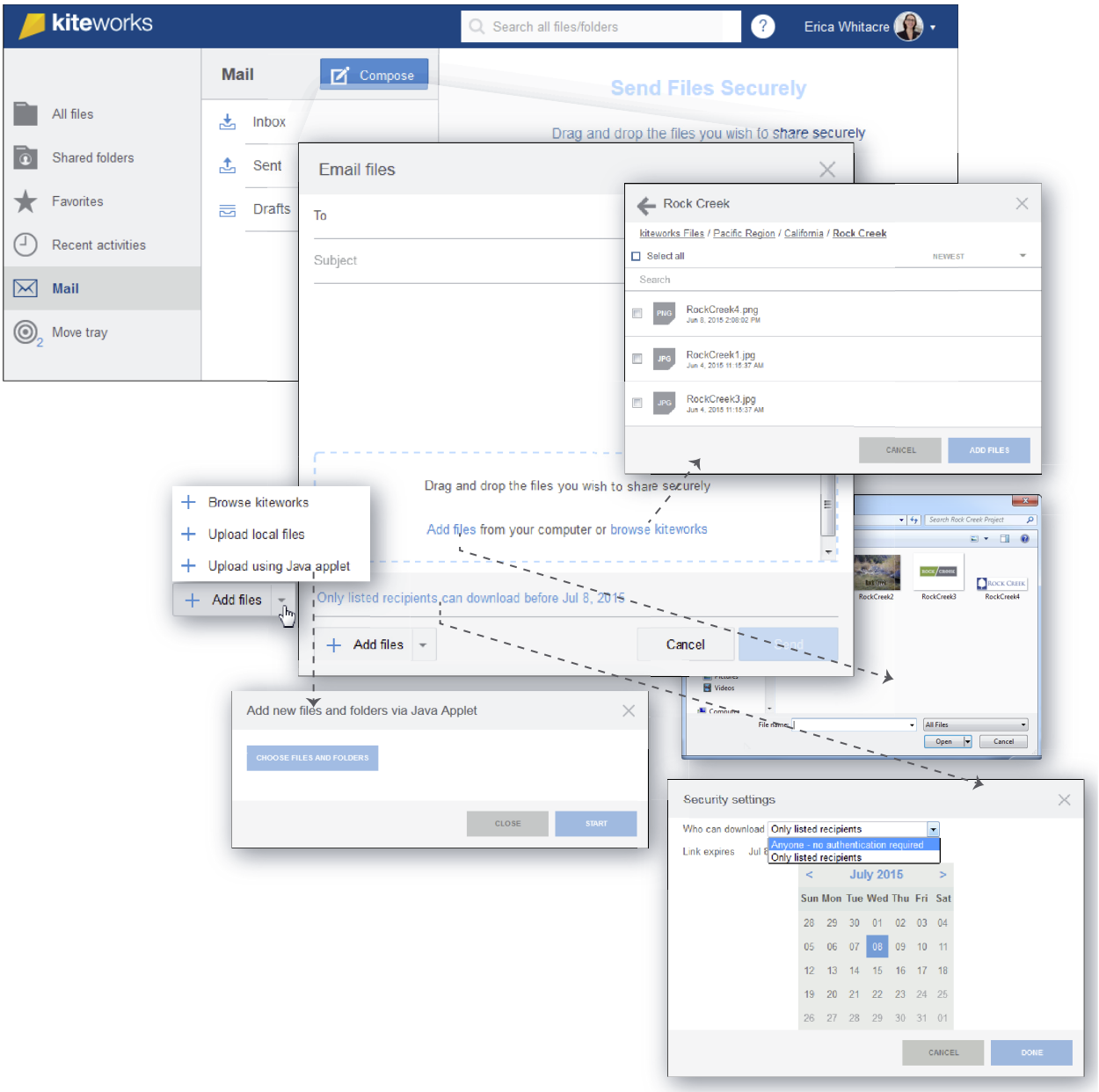
   c. Select the file(s) to attach to the email. The file(s) is now listed under “Attached files” on the Email File screen.

4. Click **Send**. An email containing a link to the file is sent to the person(s) you specified as a recipient, and the activity is listed on the Activity view.

Note If you click **Cancel**, you are prompted to save or discard your draft. If you save the draft, the action of saving the draft is listed on the Activity view. To access the draft, from the Activity view (refer to Recent Activities View: Track Your Work), click on the activity. You then have the option to open the draft and discard, edit, or send it.

5. If the recipients don’t receive the email in a short while, advise them to check their spam filter, as the email may have been mis-identified. Also advise them to add your email address to their list of accepted contacts.

(Alternatively, you can click the “Email” button on the navigation panel, select **Compose**, then add a file to that email. Skip to Step 3 above.)



Email a Preview of a File

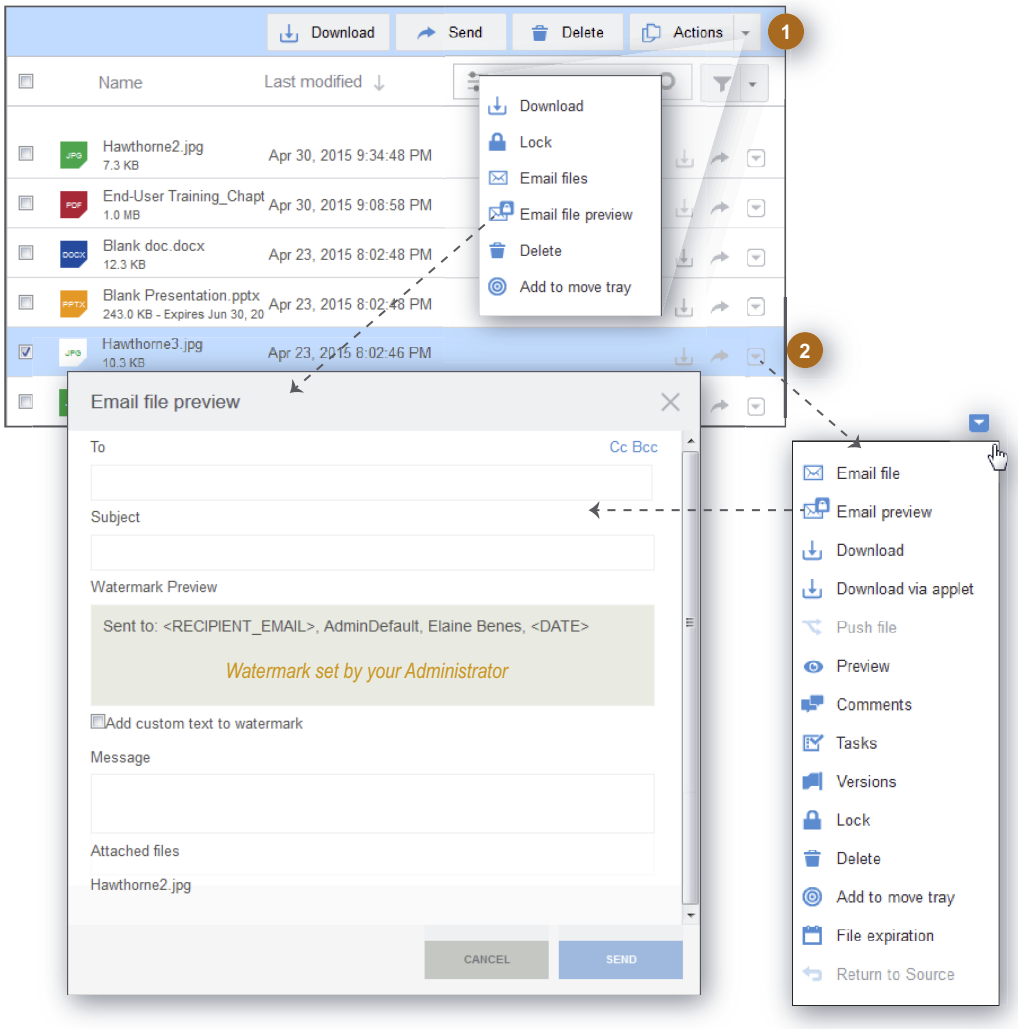
Emailing a “preview” of a file means that instead of sending a link to an editable and downloadable file, you send a link to view the file online, which cannot be edited. This feature is only available for files 20 MB or smaller.

As a recipient, you can only view the file and cannot forward it.

To send — or email — a preview of a file, perform the following steps.

1 Navigate to the file to send, and select that file.

2 Using one of the two methods below, select **Email file preview.**



3 Fill out all of the listed fields.

- **To**

  The email address of the recipient(s); separate each email address with a semicolon.

- **Subject/Message**

  Determined by you; if you have a signature set in your personal settings, the signature will appear here.

- **Add custom text to watermark**

  If you select this box, a watermark that you determine appears overlaid on the file. This watermark is not affixed permanently to the file. It only appears to the recipient when the file is sent as a preview.

  Your Administrator may also add some default fields after your text. In this case, this includes “Sent to”, the name of the person sending the file, the date it was sent, and an admin-determined text that, in this case, says “AdminDefault”.

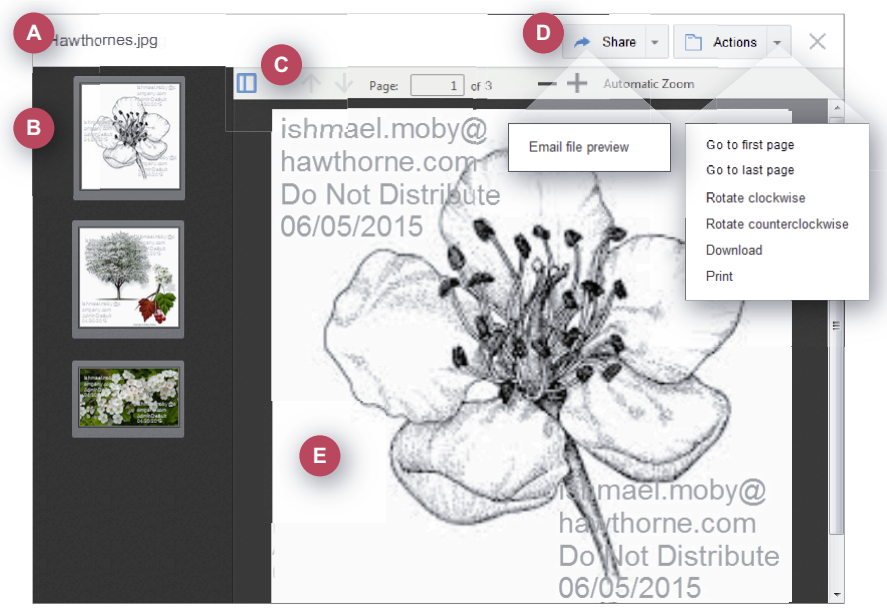
- **Attached Files**

  The name of the preview that is attached.

4 Click **Send**. The recipient receives an email with a link to the file preview.

5 The recipient clicks the link and is directed to a **kite**works screen.

6 The recipient clicks the "eye" button in the lower-right of the thumbnail ( ). The file opens, using the Online Viewer.



The specific sections of this screen are described in the following table.

Table 11. File Viewer

Identifier	Description	Notes
A	File Name	—
B	Sidebar	The sidebar shows a thumbnail of each page of the file.
C	Toggle Sidebar button	Click the Toggle Sidebar button to open or close the sidebar.
D	Share/Actions buttons	Allows you to perform the following functions: • Go to First /Last Page • Rotate Clockwise/Counterclockwise
E	Watermark	If you are a "Viewer" of the file, the watermark of the email address of the person viewing the file and other text determined by your **kite**works Administrator appears. If you have any other role in the folder, the watermark doesn't appear.

The default expiration date for the link to the file is 30 days following the date that it was sent. To change this date, contact your Administrator.

Request a File

Another way to collaborate using the email function of **kite**works is to request a file from an individual who may or may not be part of your **kite**works contacts or have access to your **kite**works folders.

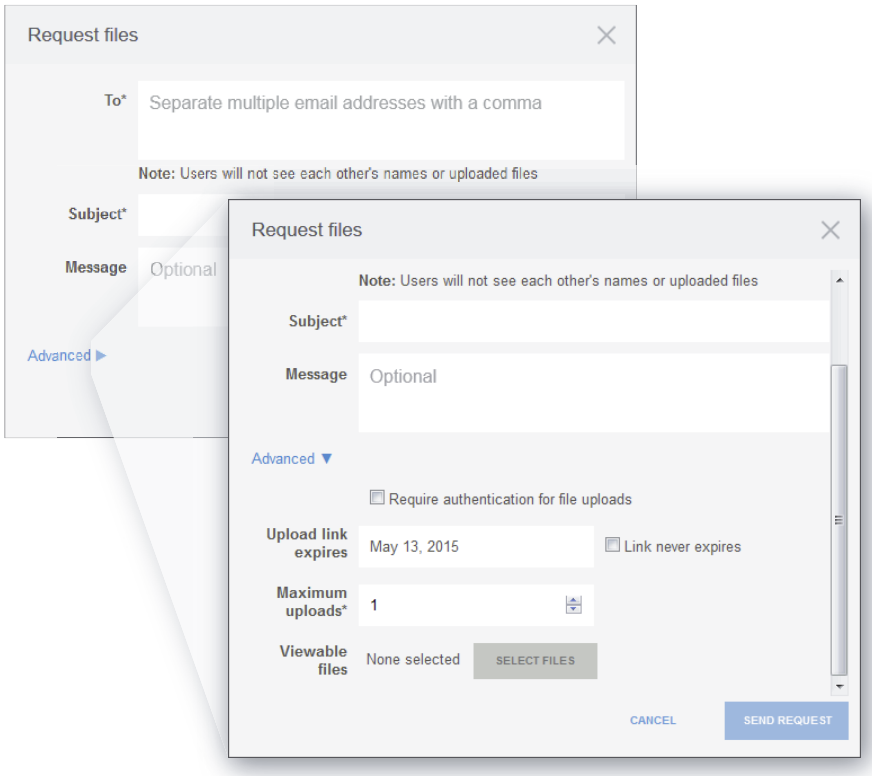
When you request a file from an external contact, you provide to that person a link that he or she can use to upload the file to you, where you can then download it securely.

Note This feature is managed by your Administrator. If you cannot request a file, contact your Administrator to enable this feature.

To request a file, perform the following steps.

1. Navigate to the folder in which you would like the requested file to reside.

2 Click the *New* button (+) and select **Request files**. The *Request files* window appears.



3 Fill out the listed fields.

To (required) The recipients can be anyone, regardless of whether they are members of your organization. Separate multiple addresses with a semicolon. Each recipient receives a unique upload link.

Subject (required) The subject of the email that will be sent.

Message (optional) The message of the email.

Advanced Options:

Require authentication for file uploads Indicate whether uploader will need an authenticated **kite**works account to upload the file. If the user does not have a **kite**works account, s/he will be prompted to create an account before uploading.

Note If the uploader is within your organization's domain, s/he would need a license. If the uploader is outside of your organization's domain, s/he would be a restricted user and would not use a license.

Upload Link Expires This is how long the invitation to upload a file will be valid. The default is one week from the current date. You can select another date, or indicate that the link will never expire.

Maximum Uploads (required) This is the number of files each uploader is allowed to upload using this invitation.

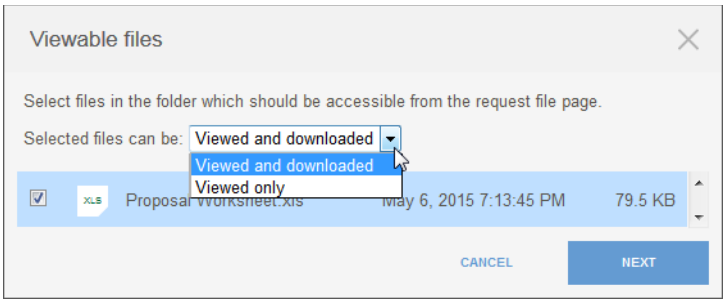
Viewable Files When users upload files to the folder using this invitation, they cannot see the other files that are in the folder, either already existing or uploaded by other users. You may, however, indicate files that the uploader *can* see, either to view or download.

To select those files that can be viewable, perform the following steps.

a. Click **Select Files**. The *Viewable files* window appears, showing all files that currently exist in the folder.

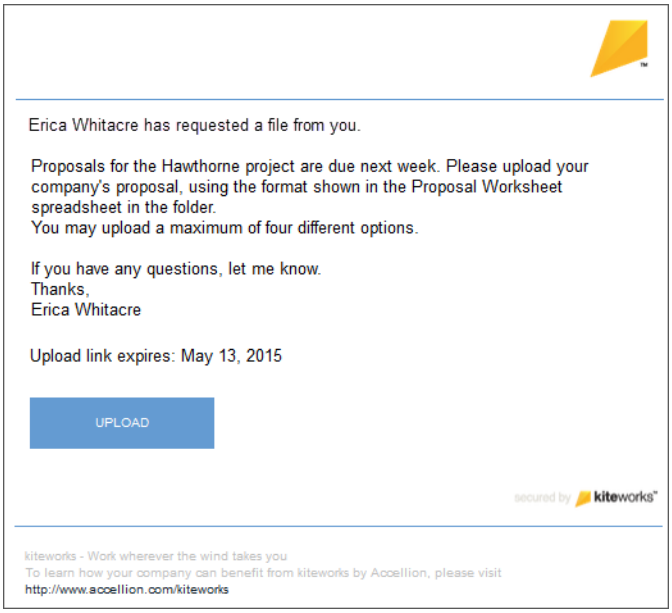
b. Select the extent of the uploader's ability to use those files (**Viewed** or **View and Downloaded**).

c. Select the files to include.



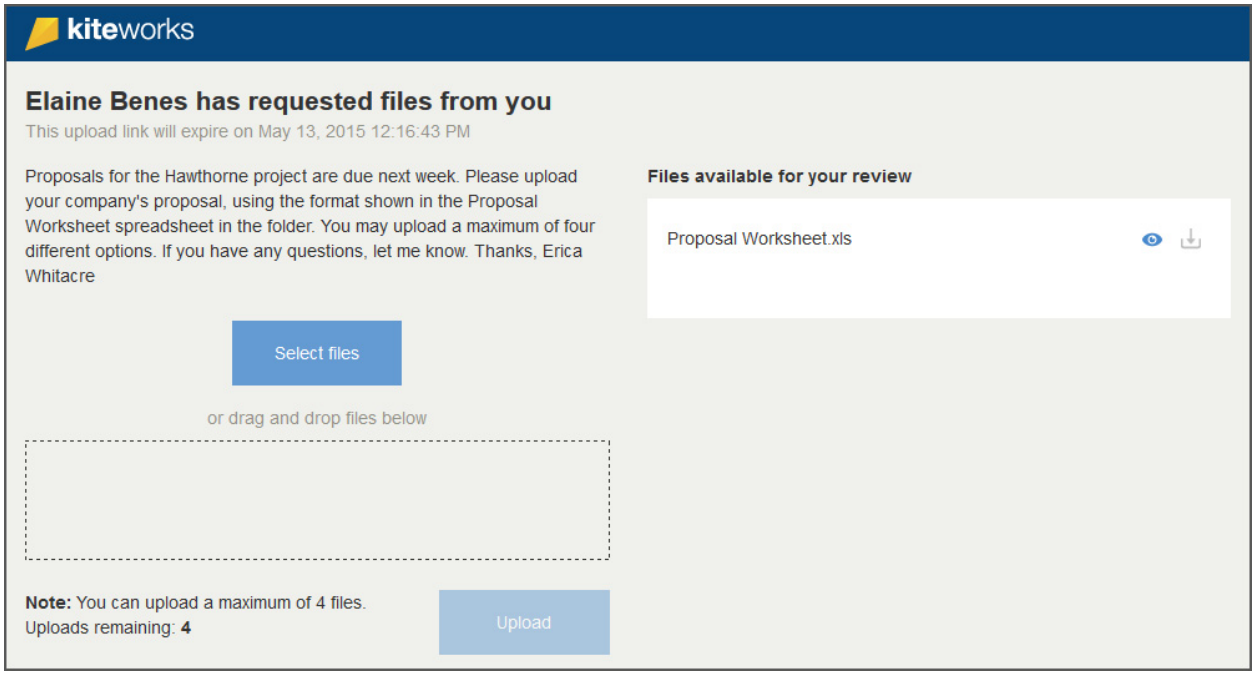
d. Click **Next**.

4 Click **Send Request**. An email is then sent to your contact(s), with the following info.



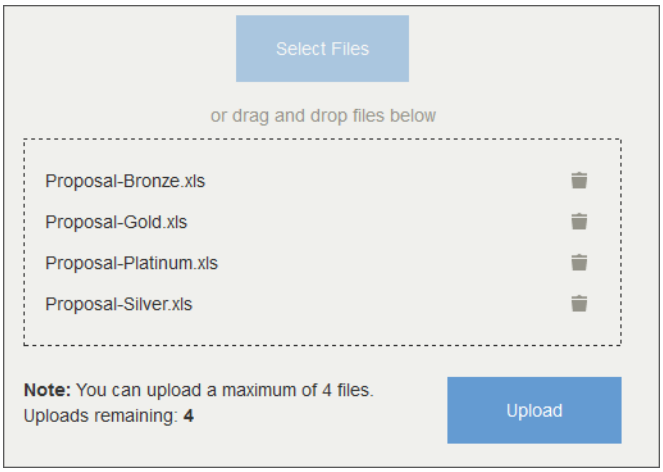
At the same time, you receive a notification in Recent Activities View: Track Your Work, for each person from whom you requested files. You have the option to withdraw the request from this view. (If you withdraw the request, the withdrawal also appears in the Activity feed.)

5 The contact clicks the **Sign In** button, and after authentication (if required), is taken to the following screen, using his or her default browser.



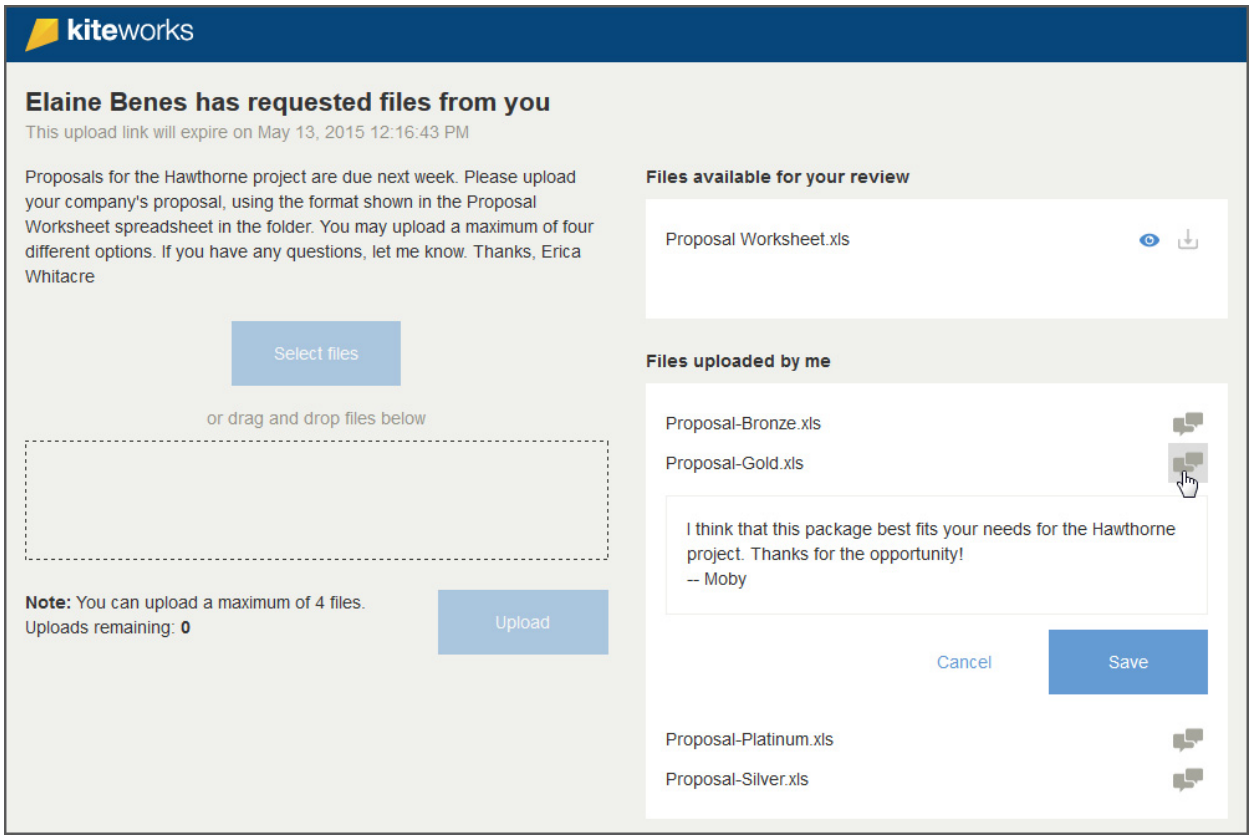
In this case, because the Requester indicated that the “Proposal Worksheet” is both viewable and downloadable, the “view” icon ( ) and the “download” icon ( ) appear next to the “Proposal Worksheet” file.

6 The uploader clicks **Select Files**, which opens the his/her operating system explorer, and navigates to the requested file. Alternatively, s/he can drag and drop the files into the space indicated on the page.



7 The uploader then clicks **Upload**, and the files are uploaded to the location that you specified when you sent the original request. The uploader also gets confirmation that the upload was successful by a new field on the Uploader window: *Files uploaded by me*.

Note *Optional:* If the uploader wishes to make a comment about any of the uploaded files, s/he can click the "comment" icon ( ), make the comment, and click **Save**. Only authenticated users can make comments on their files.



Note If the uploader uses the link from the invitation email to return to the upload page, s/he can upload the file again, and the file will be versioned to the new version. Be aware, however, that this version counts towards the maximum number of uploads that you specified in the invitation message.

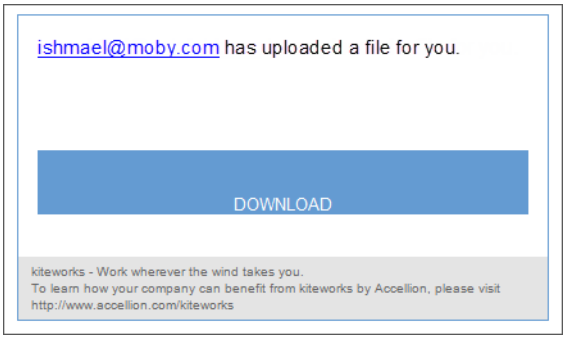
8 The files are now uploaded with the associated comments made by the uploader. You, the requester, can view all of the files uploaded by the uploaders.

Uploaders can only see those files uploaded by them and the files you marked as viewable in the *Request File* window.

If, in the request, you specified that the uploader must be authorized by kiteworks before uploading, the uploaded files will show the user name of the uploader in parentheses as a part of the file name; for example, **FileName(UploaderEmailAddress).doc**.

Caution If a user already has a role in the folder, the permissions that come with that role still apply. For example, if the user is already a Viewer in the folder, he will be able to view all files uploaded to the folder, including those uploaded by those listed in the invitation.

9 In the meantime, you, the requester, receive an email with the link to the file that was uploaded.



10 You can download the file by clicking the **Download** button in that email, or you can go to your **kite**works folder structure to verify that the file was uploaded correctly.

Add Tasks and Comments

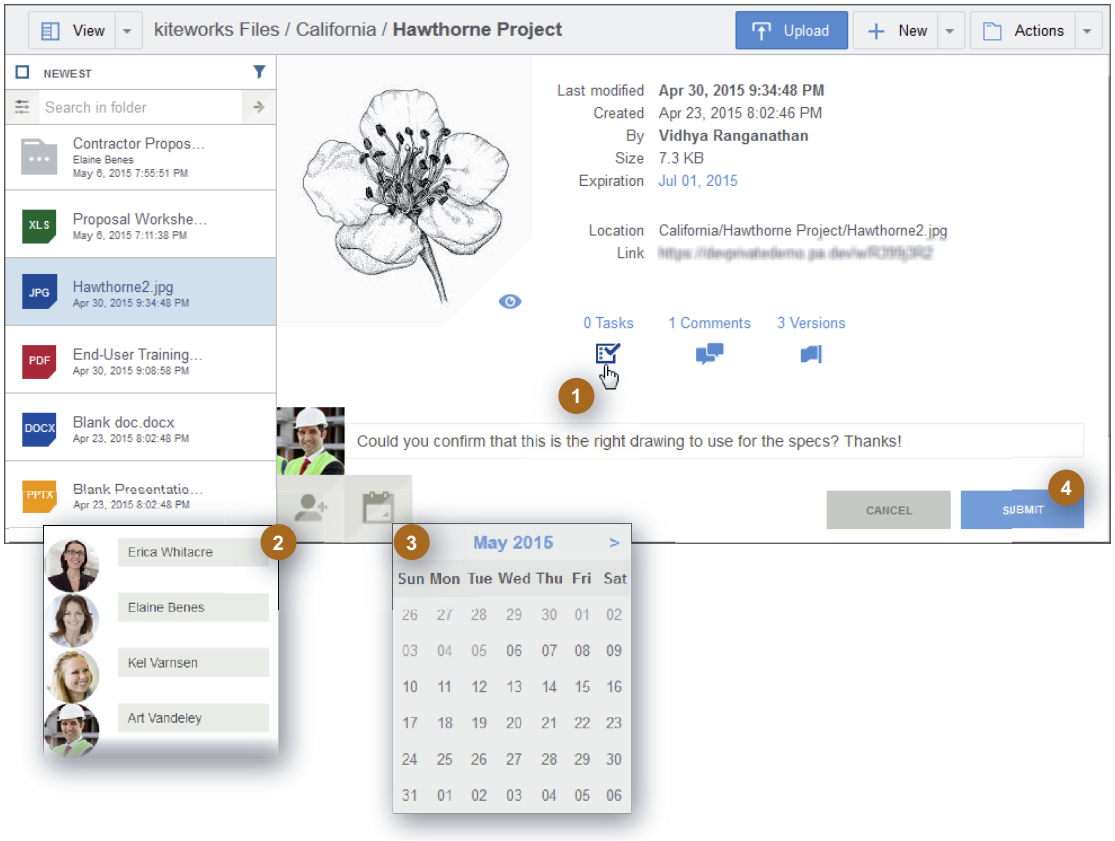
Those people who have access to a shared folder in **kite**works can add a comment to the folder. Owners, Managers, and Collaborators can also assign tasks to other users based on the contents of a folder.

Tasks

As an owner, manager, or collaborator, you can assign a task to other people who have access to a folder.

Assign a Task

To assign a task, navigate to the file associated with the task, and perform the following steps in the detail view.

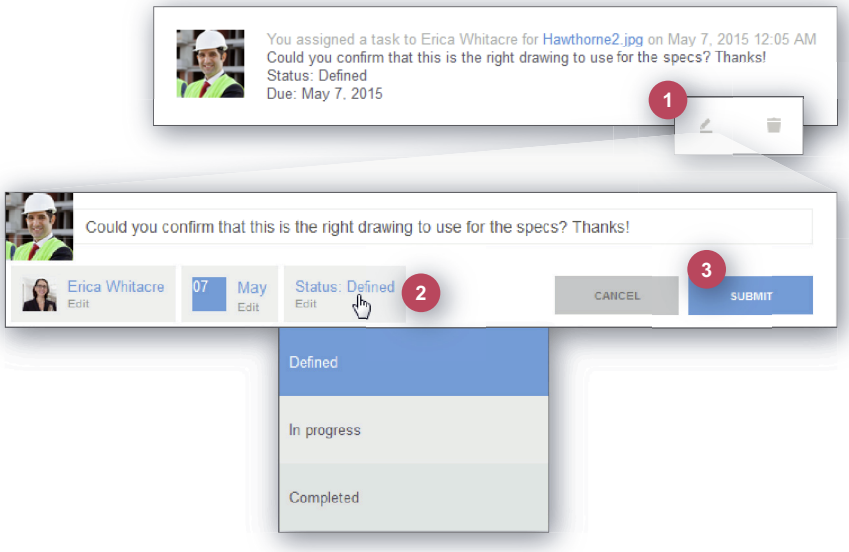


1. Click the tasks icon. The *Add a task* field opens, where you describe the task.
2. Click the “person” icon ( ) to see a list of people to whom you can assign the task. These are people who have access to the folder. Select the person.
3. Click the “calendar” icon ( ) and select a due date.
4. Click **Submit**. The task now appears in the detail list when the file is selected. The assignee also receives an email with the details about the task.

The assignee can now indicate the status on the task, from “Defined”, “In progress”, or “Completed”.

Change the Status of a Task

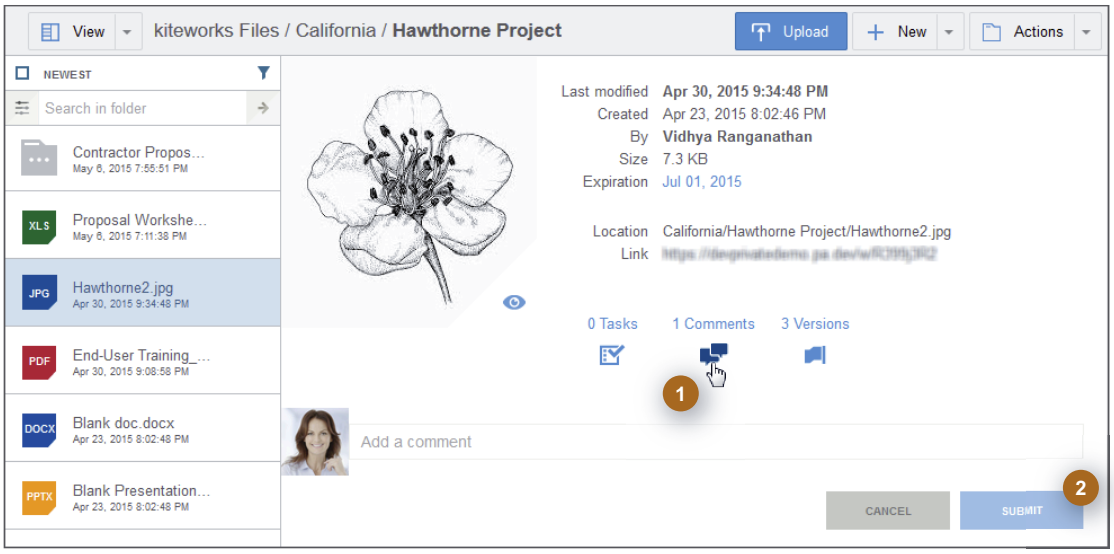
When a task is assigned to you, you can notify the originator of the task the status of that task. To change the status of a task, perform the following steps.



1. Click on the task. Two icons appear: Edit ( ) and Delete ( ). Click the “edit” icon.
2. Click in the *Status* field. A drop-down menu appears, and select the status you wish: “Defined” (the default when a task is assigned), “In progress”, or “Completed”.
3. Click **Submit**.

Comments

Anyone who has access to upload a file can add a comment to that file.



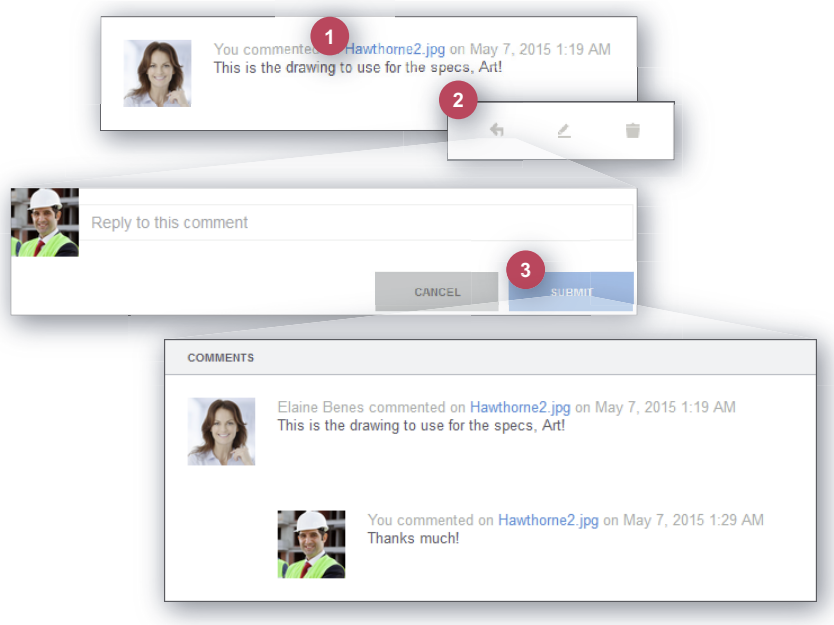
Add a Comment

To make a comment, navigate to the file associated with the comment, and perform the following steps in the detail view.

1. Click the “comments” icon. The *Add a comment* field opens, where you type your comment.
2. Click **Submit**. The comment is now associated with that file.

Respond to a Comment

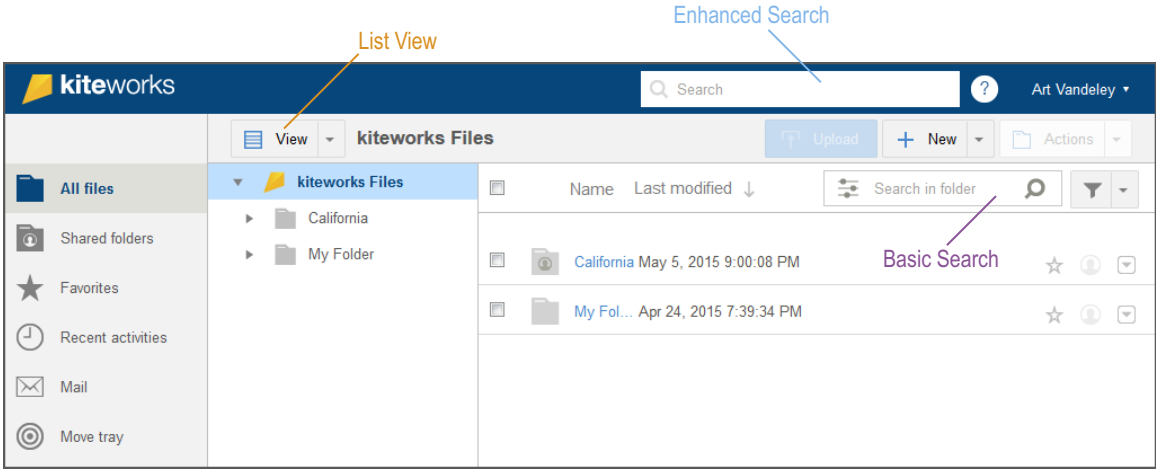
To respond to a comment, perform the following steps.

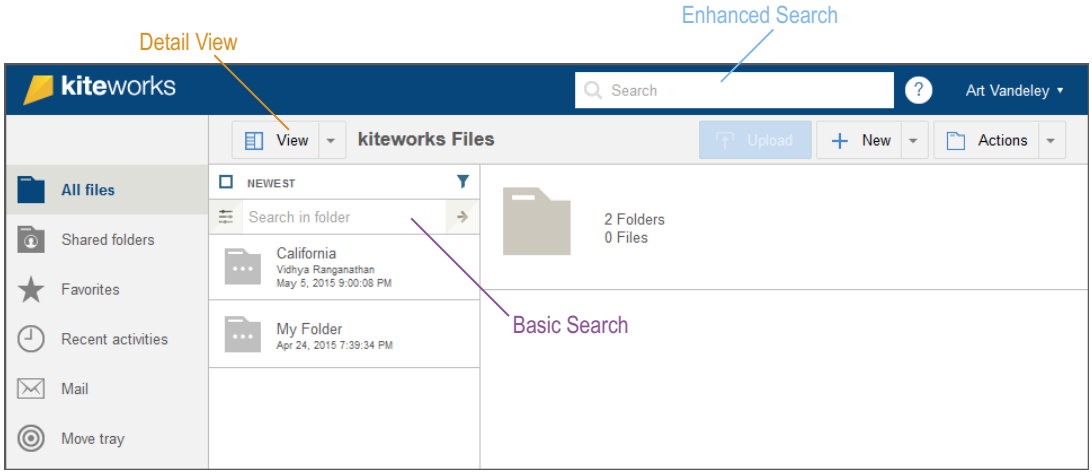


1. Click on the comment. Three icons appear: Reply ( ), Edit ( ), and Delete ( ).
2. Click the “reply” icon. The *Reply to this comment* field opens, where you type your reply.
3. Click **Submit**.

Search Functions

kiteworks offers two types of search: Basic Search and Enhanced Search. The basic search queries the names of files and folders. Enhanced Search queries the names of files, folders, mail, text in the file, and metadata, and is enabled by your **kite**works administrator.

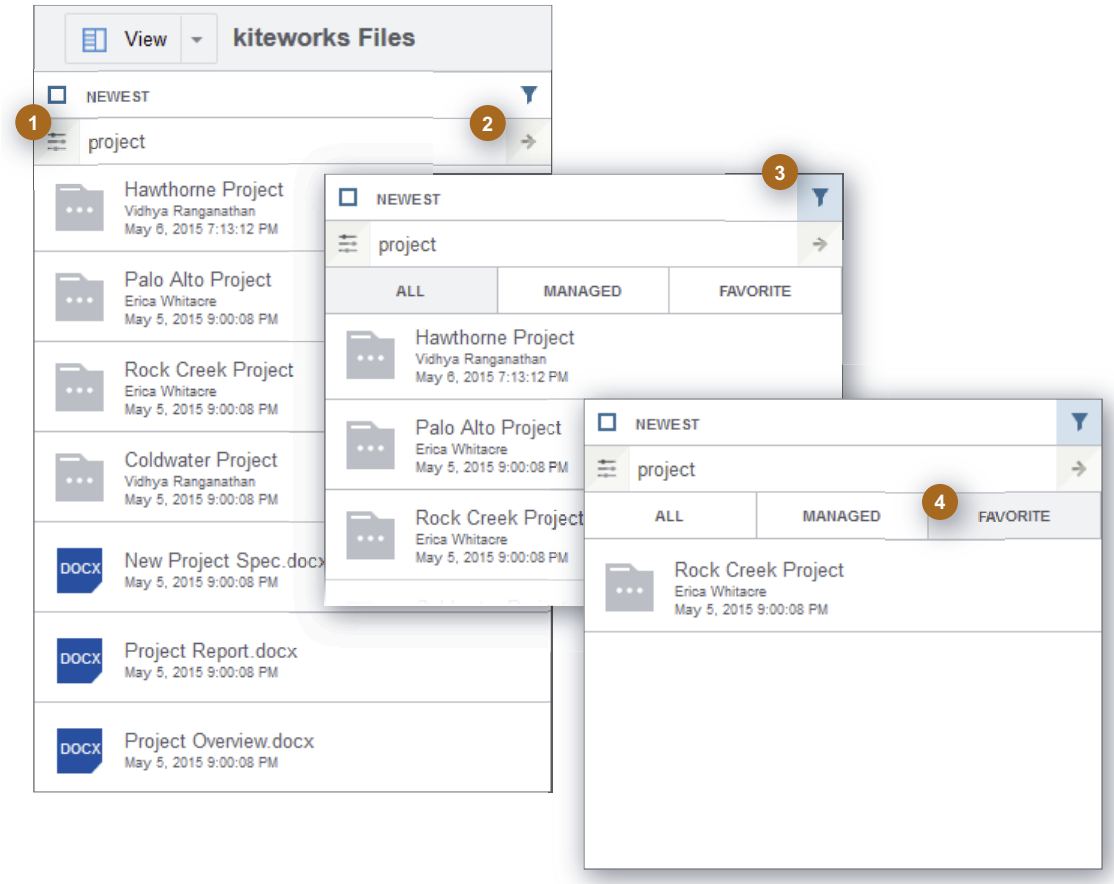




Basic Search

kiteworks supports a standard search of names of files and folders. This search simply returns the names of files or folders that contain your search term.

To use this function, first navigate to the folder in which you want to search.



1. Click in the Basic search field ( ) and enter your search parameters.
2. Click the right arrow, or type `<enter>`. The search results appear under the Search field.
3. To filter the results, click the "filter" icon ( ).
4. Select **Managed** or **Favorite**. The results are then filtered by those folders that are managed by you or marked as favorites.

Note If you filter the results by Managed or Favorite, no files will appear in the search results, because you cannot be "manager" of an individual file or mark individual files as a favorite.

5. To navigate away from your search results, either delete the search term from the field or navigate away from the folder.

Enhanced Search

kiteworks' enhanced search function includes searching files and emails for text, metadata, names of files, or names of folders. This option is enabled by your administrator. Using this search, you can narrow the searches (or filter) by file type, and organize the search results by the best match, alphabetize the results, or list the newest or oldest first.

Your search uses the following conventions:

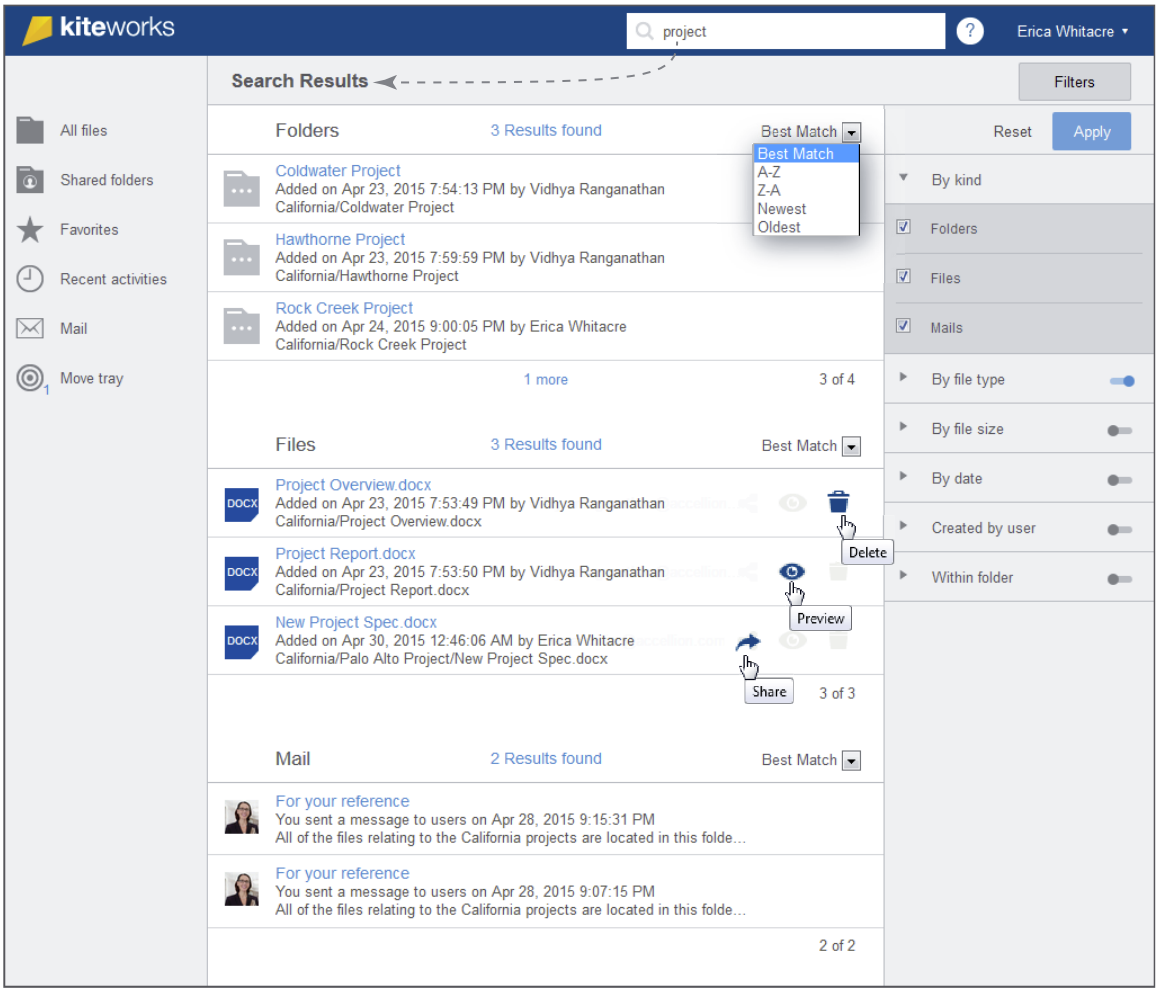
- Search terms are reduced to a root form, so searching for "engineer" will also search for variants of that word, such as **engineering**, **engineers**, and **engineered**.

- Short and common words are not included in a search (such as **a**, **an**, **and**, **is**, **it**, **or**, **not**, etc.)
- When a query has multiple words, all words will appear in the returned document(s).
- To search for a phrase, enclose it in double quotes, for example: “Coldwater Project”.

When you have a list of results, you can view the file, share (e-mail) the file, or delete the file. You can also click the link to go to the folder in which the file is located.

To search, perform the following steps.

1. On the top bar, in the Search field, type the string of words or phrase for which you want to search.
2. Type `<enter>`. The list of folders, files, and emails that contain the text you searched for is listed in the results.



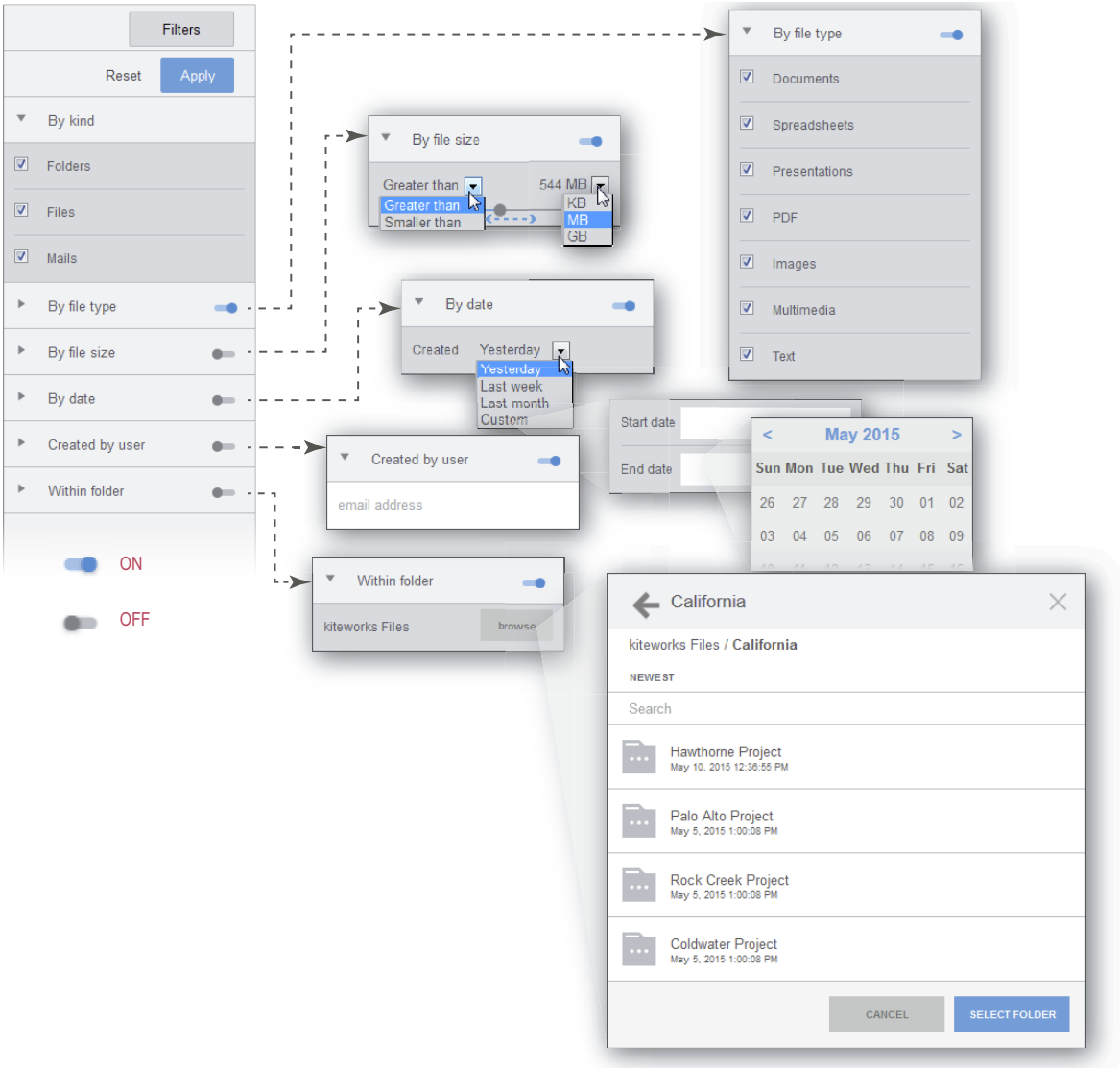
3. From this list, you can sort the results by best match, alphabetically, or by date. For each individual file, you can share, preview, or delete the files.
   a. **Share** — Refer to Email a File.
   b. **Delete** — Delete a File from the server. Due to the nature of the search system, it may take a few minutes for the item to be deleted from the search results.
   c. **Preview** — Refer to Online Viewer.

Note Quarantined files are not indexed by the kiteworks server in full text searches.

Search Filtering

To further refine your search, click the “Filters” button in the gray navigation bar. You can filter by folders, files, mails, and other parameters.

To include parameters in the filter, click the corresponding check box and if necessary, specify the parameter (such as type, size, time, created by, or within a specific folder), and click **Apply**.



Note The creation date of a file is measured by the date and time of UTC, or the Universal Time zone, also known as GMT.

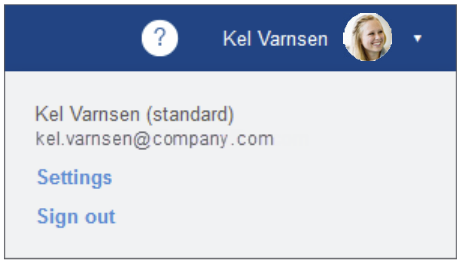
For example, if you are in the Pacific Standard Time zone (PST) and uploaded a file from your device yesterday at 6pm, then search for the file today before 5pm using the “yesterday” filter, the file will not appear. The server treats the file as having been uploaded “today”, because PST is -7 hours from UTC).

Take this into consideration when performing a filter by time.

To refresh the filtering parameters to the default — that is, the most inclusive settings — click **Reset**.

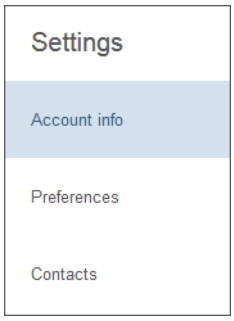
Edit Settings

Your personal settings include your account info, preferences, and contacts. Edit these settings by clicking your display name at the top right from any screen. The following menu appears. (If you have Administrative access to **kite**works, **Switch to admin portal** option also appears.)



To sign out, click **Sign out**. When you sign back in to **kite**works, the system "remembers" which view you were using and which folder you were accessing when you were last signed in, and you are returned to the same screen.

To edit your settings, click **Settings**. The *Settings* panel appears, with the following menus on the left-hand side of the screen.

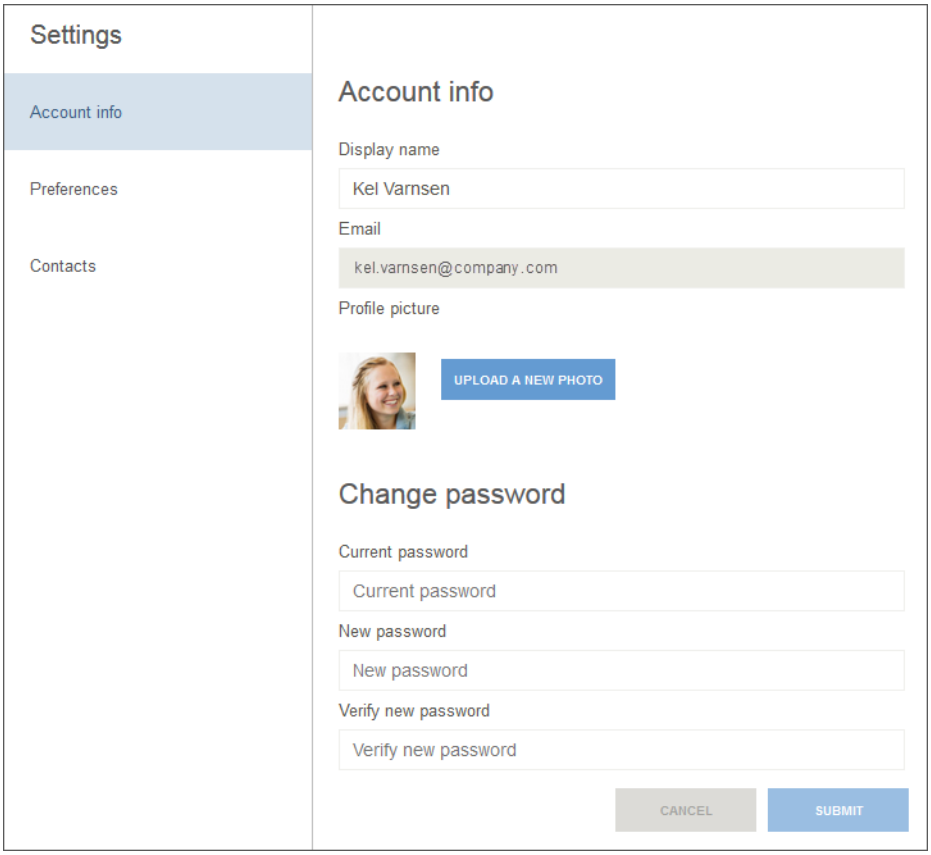


From these options, you can personalize your own **kite**works experience, including:

- Account Info
  - Display Name
  - Profile Picture
  - Password
- Contacts and Groups
  - Manage Contacts
  - Add a Contact
  - Edit a Contact
  - Delete a Contact
  - Add a Group
  - Edit a Group
- Preferences
  - Language
  - Time Zone
  - Message Signature

Account Info

Your account information consists of a display name, email address, profile picture, and password.



Display Name

To change your Display Name, perform the following steps.

1. From the **Settings** screen, click **Account Info**.
2. Type your new Display Name in the *Display Name* field (typically, `<firstname> <lastname>`).
3. Click **Submit**. Your Display Name has now been changed.

Note Depending on the settings that your Administrator has set, it is possible that you may not be able to make these changes. If this is the case, contact your Administrator for assistance.

Note You cannot change your email address here; this must be performed by your Admin.

Profile Picture

Your profile photo appears next to every activity that you perform. Accellion suggests using a basic photo of your face, in **.jpg** or **.png** format. If the photo you use is not square, the image may appear distorted, especially on mobile devices. Note that the photo cannot exceed 2 MB.

To upload or change your profile photo, perform the following steps.

1. From the *Settings* screen, click **Account Info**. Your profile picture appears.

2. Click **Upload a new photo**. Your operating system's file manager opens.
3. Navigate to your new profile photo and click **Open**.
4. When prompted "Are you sure you want to upload `<file name>` as profile image?", click **Yes**.
5. On the Account Info screen, click **Submit**. Your new photo now appears as your profile photo.

Password

Your password must meet the standards set by your Admin, and may require at least one capital letter, and at least one symbol (!@#$%&*).

Depending on your environment, you may or may not be able to change your password. If your login is based on your LDAP password or your organization utilizes SSO, your process may be different. Contact your Administrator with questions about changing your password.

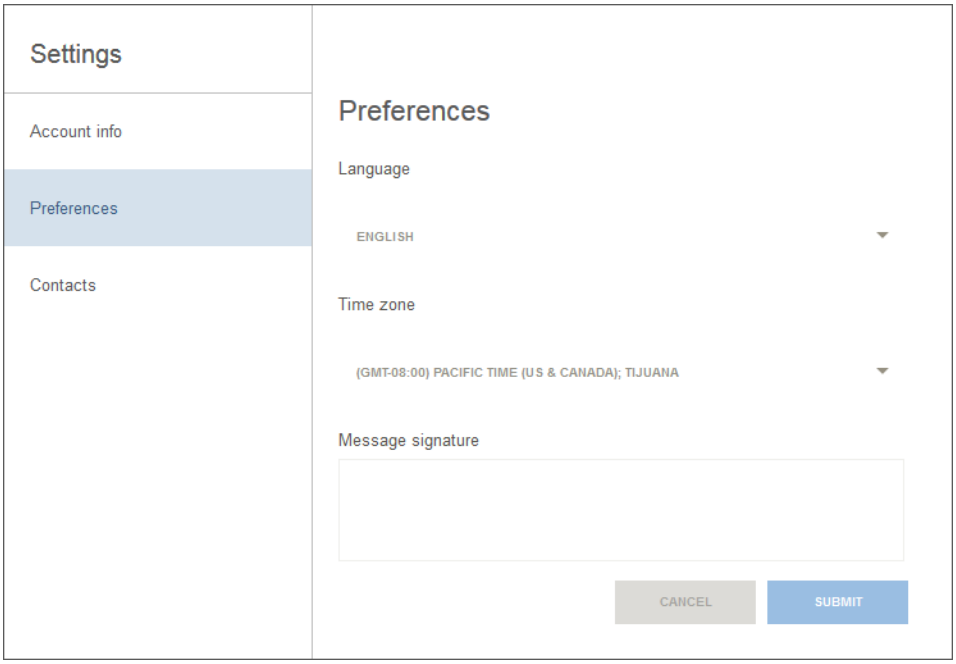
To change your password (if permitted), perform the following steps.

1. From the *Settings* screen, click **Account Info**. The *Account Info* screen appears.
2. Type in your current password.
3. Type in your new password.
4. Type in your new password for verification.
5. Click **Submit**. Your password has now been changed.

Preferences

Preferences consist of a Language preference, Time Zone indicator, and Message Signature. If your organization has more than one server location, your preferences may also include a Locations option.

To see your current preferences, from the Settings screen, click **Preferences**. The *Preferences* screen appears.



Language

The language that is the default for your operating system will be the default language for **kite**works. To change your default language, perform the following steps.

1. Under **Language**, click the downward arrow.
2. Select your preferred language from the list shown.
3. Click **Submit**. Your preferred language has now been changed.

Time Zone

kiteworks records when you perform any action. It is important that the time zone setting be set with your locale. When traveling, be sure to update this setting appropriately.

To change your time zone, perform the following steps.

1. Under **Time Zone**, click the downward arrow.
2. Select your time zone from the list shown.
3. Click **Submit**. Your time zone setting has now been changed.

Message Signature

When you send an email using the **kite**works interface, you can add a signature to append to your email. Typically, this consists of your name, title, and contact information.

To add or edit your signature, perform the following steps.

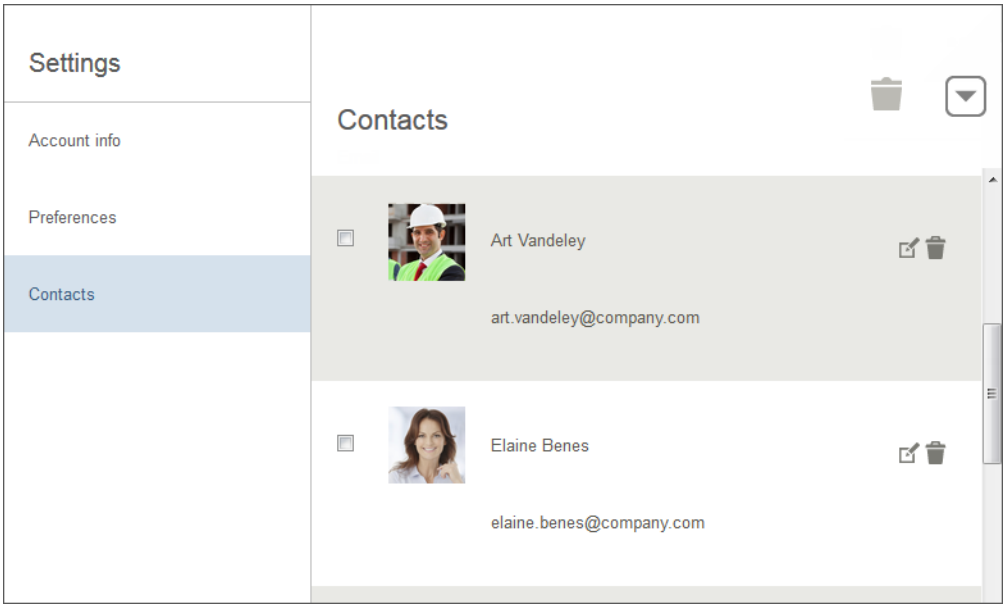
1. Under **Message Signature**, type the text you would like appended to your emails.
2. Click **Submit**. Your Message Signature has now been updated.

Contacts and Groups

Your contacts are those people to whom you send emails from **kite**works, or have added as people with sharing rights to your folders. These contacts appear in a drop-down menu or are auto-filled when sending emails. These are also the people listed as possible collaborators when you set up a shared folder. Whenever you send an email via **kite**works or invite someone to collaborate in a folder, your contacts list retains the information for future reference.

A Group is a collection of contacts that you have added to your settings. In the Contacts section of the settings, you can edit the members of a group, including their email addresses.

To see your current contacts, from the Settings screen, click **Contacts**. The *Contacts* screen appears.



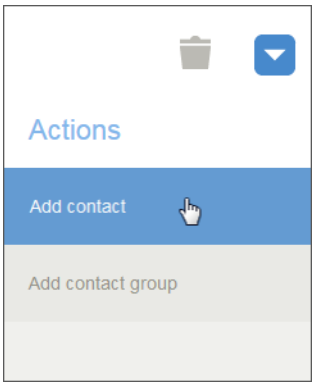
Manage Contacts

Managing your contacts consists of adding, editing, and deleting members of your contacts list.

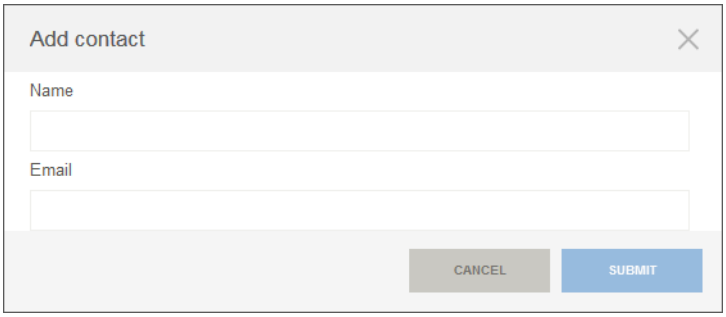
Add a Contact

To add a contact, perform the following steps.

1 From the **Contacts** screen, click the " " icon in the upper right corner. A list of possible actions appears.



2 Click **Add Contact**. The *Add contact* window appears.



3 Type the display name of the contact (generally, `<firstname> <lastname>`) and add the contact's email address.

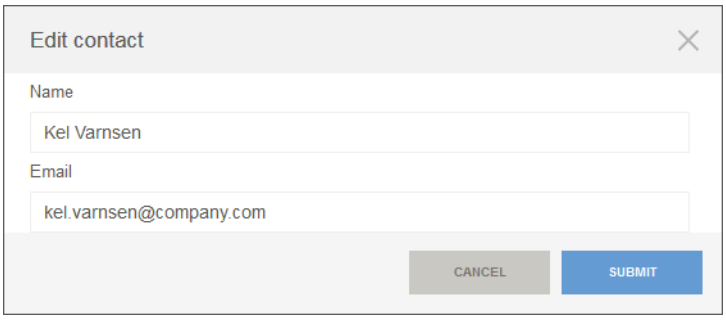
4 Click **Submit**. The name now appears in the list of contacts.

Edit a Contact

To edit an existing contact, perform the following steps.

1 In the **Contacts** screen, next to the contact you would like to edit or delete, there are two icons:

Click the "edit" icon on the left. The *Edit contact* screen appears.



2 Make your edits.

3 Click **Submit**. Your edits are now saved.

Delete a Contact

To delete an existing contact, perform the following steps.

1 In the **Contacts** screen, next to the contact you would like to edit or delete, there are two icons:

2 Click the "delete" icon on the right. The *Delete contact* confirmation screen appears.

3 Click **Yes**. The selected contact has been deleted from your contacts list.

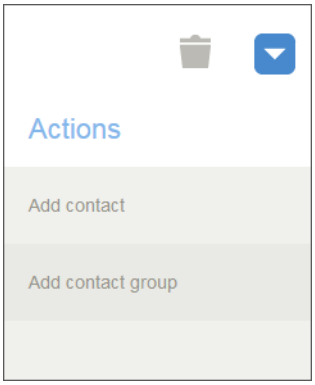
Add a Group

A group is a collection of contacts within your Contacts list. To send a message or file preview to a group, just type the Name of the group in any "To" field.

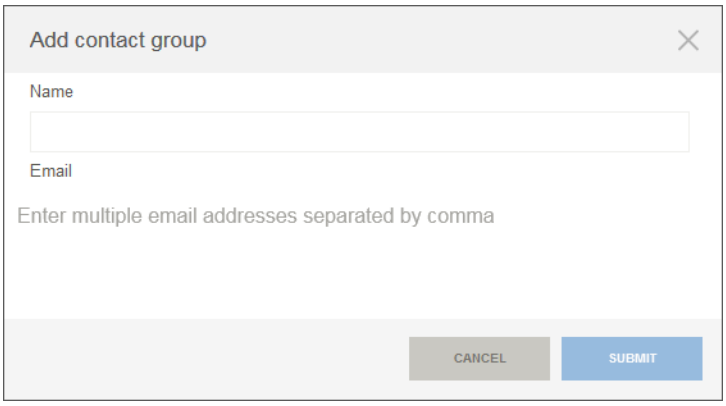
Add a group from the same location as you would add a contact.

To add a group, perform the following steps.

1 From the **Contacts** screen, click the " " icon in the upper right corner. A list of possible actions appears.



2 Click **Add contact group**. The *Add contact group* window appears.



3 In the *Name* field, add the name of the group.

4 In the *Email* field, add the email addresses of the members of the group. Separate email addresses with a semicolon.

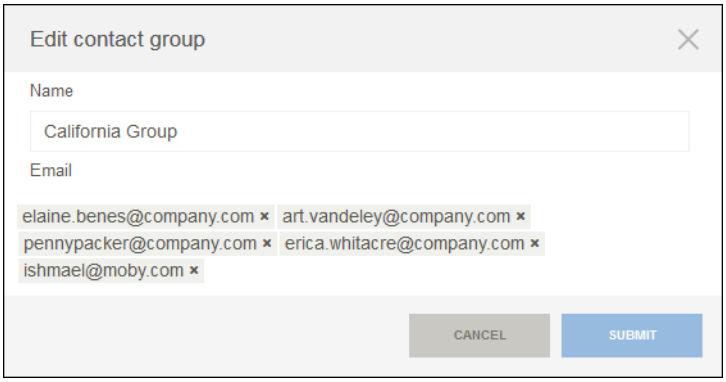
5 Click **Submit**. The group appears in your list of contacts.

Edit a Group

To edit an existing group, perform the following steps.

1 In the **Contacts** screen, next to the group you would like to edit or delete, there are two icons:

1 Click the “edit” icon on the left. The *Edit contact group* screen appears.

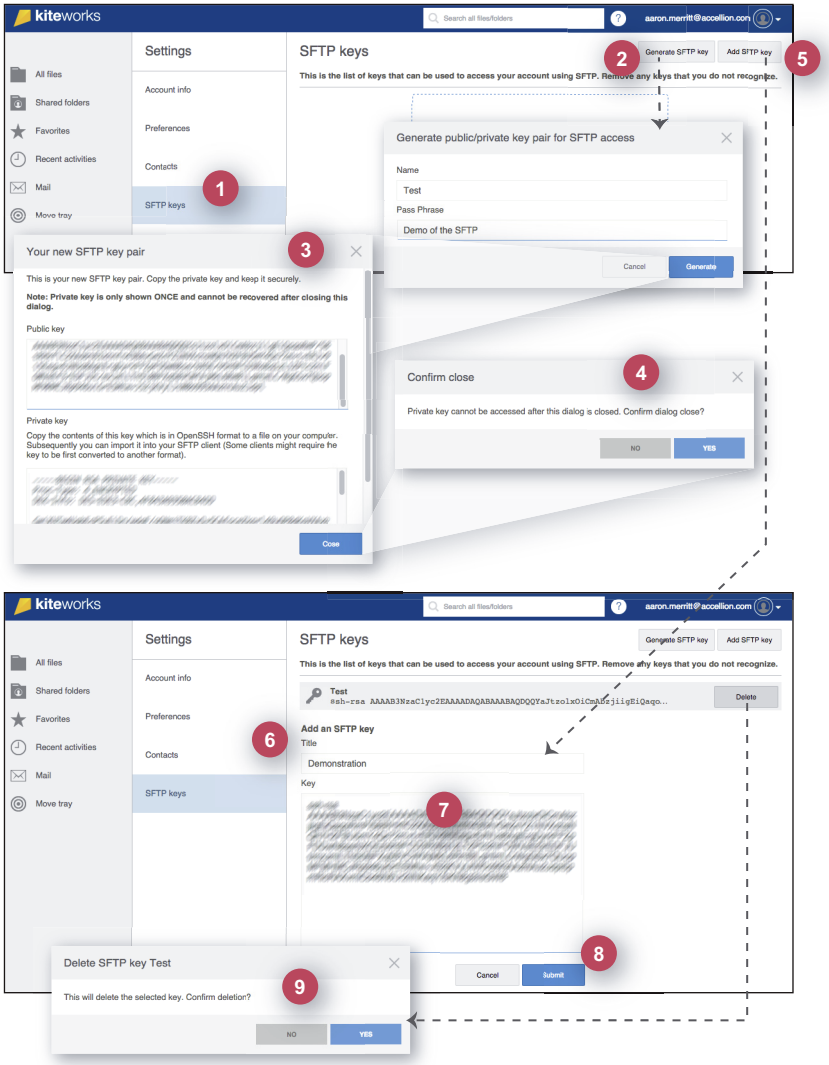


2 Make your edits.

3 Click **Submit**. Your edits are now saved.

SFTP Keys

If your administrator has enabled SFTP access for you, you can generate or add your own STFP key pairs in your account settings. Note that your generated SFTP keys are secure information, and like a passwords, should not be shared or sent over unsecure communications.



Generate SFTP

To have kiteworks generate an SFTP for you to use:

1. From the **Settings** screen, click **SFTP keys**.
2. Click the **generate SFTP key** button, and in the window that opens, type the **name** and a **pass phrase** for your SFTP key, and click **generate**.
3. A window will pop up showing your SFTP key, you can copy and paste this to a file on your computer. Close the window.
4. Confirm that you want to close the window by clicking **yes**.

Add SFTP

To add an existing SFTP key to kiteworks:

5. Click the **add SFTP key** button.
6. **Title** the SFTP key
7. Paste your existing SFTP key into the **key** field.
8. Click **submit** to save the SFTP key.

Delete SFTP

To delete an SFTP key in kiteworks:

9. Click the **delete** button next to the SFTP key you want to remove, and in the window that appears, confirm the deletion by clicking **yes**.

kiteworks Resources

If you have questions that were not answered by this guide, visit our knowledge base at:
https://support.accellion.net/
For support on technical issues, visit our support portal at:
http://www.accellion.com/support

Appendix A: Icons and Symbols

Table 1. **kite**works Icons and Descriptions

Icon	Description	Notes
Navigation Panel		
	All files	Lists all the folders to which you have access. For more information, refer to Where You Work.
	Shared folders	Filters the list of folders to those you have shared with other users or folders that have been shared with you. The view is identical to the detail view, with unshared folders filtered out of the list. For more information, refer to Detail View: Explore Your Files and Folders and Mobile Editor to update and edit Microsoft Office files or to annotate PDFs..
	Folder with Content	The three dots indicate that the folder contains files or folders.
	Favorites	Filters the list of folders to those you have marked as a favorite. The view is identical to the detail view, but shows only the folders you have marked as favorites. For more information, refer to Detail View: Explore Your Files and Folders and Make a Folder a Favorite.
	Recent activities	Jumps to the Activity view for managing tasks, comments, and other activities. For more information, refer to Recent Activities View: Track Your Work.
	Mail	Opens the Email Files window. For more information, refer to Email a File.
	Move tray	Opens the Move Tray panel. For more information, refer to The Move Tray.

Table 1. kiteworks Icons and Descriptions

Icon	Description	Notes
File and Folder Actions		
	Actions	Opens a menu of actions you can perform on a file or folder; refer to Folder Management and Actions and File Management and Actions.
	Add files, Create folder, or Request files	Reveals elements to add to the current folder; refer to: • Add or Upload Files • Create a New Folder • Request a File
	Calendar	Click this button to select a date. Refer to: • Tasks • Change File Expiration Date • Search Filtering
	Close	Click this button to close a window or the Move Tray.
	Comments	When a file is selected, click this icon to add a comment that will be associated with the file. Refer to Comments.
	Create Folder - list view	In the list view, allows you to create a nested folder in the current folder. Refer to Create a New Folder.
	Delete/Discard	Discards a file, a version of a file, a comment, or a task. Refer to: • Delete and Recover a Deleted File • Add Tasks and Comments
	Detail view	In the top gray bar, click this button to switch between the list view and detail view. This button selects the detail view. Refer to Detail View: Explore Your Files and Folders.
	Download	With a file selected, allows you to download the file to your desktop so you can open it using the appropriate program (Microsoft Word, etc.). You can also download the file using the Java applet. Refer to: • Download • Edit Files in Restricted Folders
	Download Version	When viewing versions of a file, this button downloads a previous version of the file to your desktop so you can open the file in its associated program. Refer to Download Version.
	Edit	Allows you to edit a comment, task, contact, or group. Refer to: • Add Tasks and Comments • Change the Status of a Task • Edit a Contact • Edit a Group
	Email	• Email files; refer to Mail and Email a File. • Email all people who have access to the folder; refer to Send an Email to the Users of a Folder.

Table 1. kiteworks Icons and Descriptions

Icon	Description	Notes
	Email Preview	Allows you to send an un-editable version of a file to users both in- and outside of your network. Refer to Email a Preview of a File.
	Expand	With a folder selected, allows you to expand the folder information to view the expiration date, whether the folder allows sync, and the set quota.
	Favorite (Action)	Sets the folder as a "Favorite", so it is easily found again using the navigation panel. Refer to Make a Folder a Favorite.
	File/Folder Actions	When using the list view, opens the list of actions you can perform on the selected file or folder. Refer to List View: Manage Your Files and Folders.
	Filter	Allows you to filter the items that appear, including: • Search results (by many different categories; refer to Search Filtering) • Folders (Managed, Favorites, Deleted) • Files • Activities (refer to Recent Activities)
	List view	In the top gray bar, click this button to switch between the list view and detail view. This button selects the list view. Refer to List View: Manage Your Files and Folders.
	Lock	Allows you to lock the selected file so no one other than yourself can upload a new version or delete the file. Refer to Lock/Unlock.
	Manage People	Allows the user to add, delete, or change access for others to access the folder; refer to Mobile Editor to update and edit Microsoft Office files or to annotate PDFs..
	Move Tray: Copy	Copies the selected file from the Move Tray to the current folder.
	Move Tray: Move	Moves the selected file from the Move Tray to the current folder.
	Notifications	Opens the *Manage notifications* window to set the circumstances in which you receive emails for a particular activity. Refer to Manage Notifications.
	On/Off	Indicates the filters used in your Enhanced Search results. Refer to Search Filtering.
	Properties	Opens the *Edit properties* window to change the properties of a folder. Refer to Edit Folder Properties and Mark a Folder as Restricted.
	Reply	Allows you to reply to a comment or task. Refer to Add Tasks and Comments.

Table 1. kiteworks Icons and Descriptions

Icon	Description	Notes
	Return to Source	Returns a file to its enterprise content source; refer to Use the Move Tray to Collaborate with Outside Users on Enterprise Content Files.
	Request file	Allows you to add files to a folder by requesting files from others. Refer to Request a File.
	Retrieve deleted items	Allows you to retrieve files that have been deleted. Refer to Recover a Deleted or Expired File.
	Search	Allows you to perform an enhanced search of files and their contents. Refer to Enhanced Search.
	Search - go	Button to implement the Search. You can also type `<enter>`. Refer to Search Functions.
	Search in folder	Allows you to search for folder and file names within a specific folder. Refer to Basic Search.
	Settings	Your personal settings include your account info, preferences, and contacts. Refer to Edit Settings.
	Share	Opens the *Email file* and *Email preview* menu; allows you to send files to users both in- and outside of your network. • Refer to Mail and Email a File • Refer to Email a Preview of a File
	Task	When a file is selected, click this icon to add a task. Refer to Add Tasks and Comments.
	Task: Assign a person	Click this button to assign a task to a user of a shared folder. Refer to Add Tasks and Comments.
	Unlock	Indicates that the file can be unlocked by you. Refer to Lock/Unlock.
	Upload	Opens the *Add new files* window; this is a shortcut to add new files to a selected folder. Refer to Add or Upload Files.
	Upload - list view	In the list view, opens the *Add new files* window. Refer to Add or Upload Files.
	Versions	• When a file is selected, click this icon to add a new version of the file to **kite**works. Refer to Add New Version. • Makes a previous version of a file the Current one. Refer to Make Current.
	View icon in thumbnail	When a file is selected using the detail view, this button allows you to view the file without downloading it to your desktop, using the online viewer. Refer to Online Viewer.

Table 2. Enterprise Source Icons

Icon	Description	Notes
	Add new source	From the Actions menu at the highest point in the hierarchy, allows you to add a new source to **kite**works. Refer to Add a New Enterprise Content Source to kiteworks.
	Box	Icon indicates that the content source is from Box. Note that end-users cannot add a new Box connector. To add a new Box connector, contact your Administrator.
	Documentum	Icon indicates that the content source is Documentum.
	Dropbox	Icon indicates that the content source is Dropbox.
	eDOCS	Icon indicates that the content source is eDOCS. Note that the functionality using eDOCS is limited at this time.
	Google Drive	Icon indicates that the content source is a Google Drive. Note that end-users cannot add a new Google Drive. To add a new Google Drive, contact your Administrator.
	Manage Legal Content	Icon indicates that the content source is Manage Legal Content. Compatible with iManage.
	Home Share	Icon indicates that the content source is the home directory of your operating system. To add your Home Directory, contact your Administrator.
	kiteworks	Icon indicates that the content is in **kite**works.
	OpenText Content Server	Icon indicates that the content source is OpenText.
	SharePoint or Microsoft OneDrive	Icon indicates that the content source is SharePoint 2007, 2010, or 2013.
	File Shares	Icon indicates that the content source is Windows File Shares/CIFS or Distributed File Systems (DFS).

Appendix B: EC Compatibility

Figure 1. Enterprise Connect Compatibility and Functionality

Enterprise Content Management (ECM) Source	Add Source by End User	Access File Based on ACL	Download/Upload	Share File with Internal / External Users	Check In / Check Out	Edit / Annotate Files	Add to Folder from ECM	Send File from ECM	Retrieve from Folder	Icon
Windows Shared Folders: CIFS, SMB v.1, WMB v.2	Mobile Web	Mobile Web	Mobile Web	Mobile Web	N/A	Mobile	---	---	---	
Distributed File System: DFS	Mobile Web	Mobile Web	Mobile Web	Mobile Web	N/A	Mobile	---	---	---	
SharePoint 2013: SP2013	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile	Via SP Plugin	Via SP Plugin	Via SP Plugin	
SharePoint 2010: SP2010	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile	Via SP Plugin	Via SP Plugin	Via SP Plugin	
SharePoint 2007: SP2007	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile	---	---	---	
SharePoint Online (beta): Office 365	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile	---	---	---	
EMC Documentum (beta): Platforms 7, 6.7, 6.6	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile	---	---	---	
OpenText Content Server: Platform 10, v. 9.7.1 (Livelink)	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile	---	---	---	
OpenText: eDocs	Web	Mobile Web	Down-load only	Mobile Web	N/A	Mobile	---	---	---	
Google Drive: Business	Only by Admin	Mobile Web	Mobile Web	Mobile Web	N/A	Mobile	---	---	---	

Figure 2. (Continued)

Enterprise Content Management (ECM) Source	Add Source by End User	Access File Based on ACL	Download/Upload	Share File with Internal / External Users	Check In / Check Out	Edit / Annotate Files	Add to Folder from ECM	Send File from ECM	Retrieve from Folder	Icon
Box	Only by Admin	Mobile Web	Mobile Web	Mobile Web	N/A	Mobile	---	---	---	box
Home Directory: Windows, Unix, Linux	Only by Admin	Mobile Web	Mobile Web	Mobile Web	N/A	Mobile	---	---	---	
OneDrive: Office 365	Only by User	Mobile Web	Mobile Web	Mobile Web	Mobile Web	Mobile	---	---	---	
Dropbox	Web	Mobile Web	Mobile Web	Mobile Web	N/A	Mobile	---	---	---	