Client Guide: Getting Started

Logging In

Note: You may have been sent a request to download or upload a file without being sent any login information. If this is the case, you do not need to worry about a username and password.

If you have been set up with a client user account, you may log in from one of three places:

1. secure.sharefile.com — this will be provided to you by the company that set you up with the client user account.
2. The firm's web site (www.rcmtulsa.com)
3. If you don't know the ShareFile.com subdomain and the company that sent you the information does not have a custom login form on their web site, you can look up the subdomain by going to secure.sharefile.com

Your username is your email address.
Your temporary password to get started will be emailed to you by the user that set up your client user account.

Note: It may be possible that your client user account has been restricted against the ability for the client to reset their own password. If this is the case, you will not be able to reset the password yourself and you will need to contact the user that set up your client user account, or a ShareFile administrator for that company.

If you have not received your password, you may either:

1. Ask the user that set up your client user account or
2. Click on the **"Forgot your password?"** link under the login (if this permission is enabled for your client user account).

The first time you log in, you will be prompted to choose a permanent password.

My Settings

Note: It may be possible that the "My Settings" does not appear in your navigation bar. If this is the case, this means that in the creation process, the user that created your client user account elected to not allow you to be able to view the "My Settings" page and alter and of its contents.

The following are available through the "My Settings" link on the navigation:

1. **Time Zone and Date Format**
   You can change your current time zone, as well as a different date formatting
2. **Change Name**
   You can set or change your name in the system.
3. **Add/Edit Email Addresses**
   If you use multiple email addresses, you may associate all of them with your ShareFile account. You may log in with or be added to a folder by any of your email addresses.
4. **Reset Password**
   You may also reset your password.
   Passwords must be between 4 and 15 characters in length.
5. **Change upload preference**
   You can change the upload component that is used for your user account.
6. **Distribution Groups**
   You can create, edit, and delete groups of users that can be referenced in common tasks such as the "send" functions, "request" functions, and granting access permissions to folders.

Upload Components

There are currently 3 different upload components available:

1. **Standard Upload**
   This is an upload component that does not require any plugins to be installed on your computer. You can

only upload one file at a time with this component.

2. **Enhanced Flash Upload**
Requires Flash Player 8 or above. This component allows you to select multiple files to upload at one time, instead of one file at a time. However, you cannot select a folder and have all the contents of the folder be uploaded. Due to a security bug, this option will not work with the FireFox browser.

3. **Enhanced Java Upload**
Requires latest version of the Java Runtime Environment. This component will work with any browser and has all the capabilities of the Enhanced Flash Upload plus some additional features. This component will allow you to upload entire folder structures, as well as retries in case your internet looses connectivity for a brief period of time. This component is currently in the beta development cycle, but all users are welcome to enable this component for their user account.

By default, all users are set up with the preference of the **"Enhanced Flash Upload"** as the upload component. This component allows you to select multiple files at a time, instead of one file at a time.

Uploading Files

If you have been sent a link to upload files, you will be presented with 5 individual upload boxes. You can only select one file for each upload box, so if you have more than 5 items, you may want to zip all the files into one compressed file and upload this to ShareFile.

If you have access to upload into folder on ShareFile, you can use the following instructions to upload files into their ShareFile account.

Uploading a Single File
To store a file online:

1. Enter a folder which you created by clicking on it.
2. Click the "Add File" or "Choose Files" button.
3. Click the "Browse" button and select a file from your computer.
4. Optionally you can choose a title for the file.
5. You may also optionally enter a detailed description.
6. If you check the box to email users, all users who have access to the folder will be sent a brief notification that a file has been uploaded.
7. Click the "Add" button.

Uploading Multiple Files
If you are using the "Enhanced Flash Upload" or the "Enhanced Java Upload", you only need to hold down the control or the shift key when browsing for files.

If you are using the "Standard Upload", here are the instructions for adding multiple files:

1. Click the "Add File" button within a folder.
2. Click the "add multiple files" link next to the "Browse" button.
3. You may choose to either:
   a. Upload a zip file
      - When the upload is complete the contents will be unzipped online
      - The folder hierarchy is preserved
   b. Upload up to 5 individual files

Uploading Entire Folder Structure
There are 2 different options to upload an entire folder structure.

1. Using the "Enhanced Java Upload", simply select the parent folder of everything you want to upload and select this folder. The component will then go through all the appropriate folders and replicate this folder structure within your ShareFile account.
2. Create a zip file of the folder and its contents
   a. From your computer, right-click the parent folder and select "Send To | Compressed (zipped) Folder".
   b. Browse and select this zip file from within the "Upload" page.
   c. Check off the option to "Unzip contents"
      After your file is successfully uploaded, the system will automatically create the appropriate files and

folder structure.

There is a 2GB file size limit on ShareFile.
The files will reside on the server until you delete them.
All files are backed up daily.

To create a subfolder:
If you have been given upload permissions on a folder, you can also create a subfolder within that folder.

1. Click on the "Add Subfolder" button.
2. Choose a folder title.
3. Click the "Add Folder" button when complete.
4. You will now see the folder both in the treeview as well as the main window.

Sending a File

If you have access to a folder on ShareFile, you can "send" any files that are within the folder to any users, including people that are not registered ShareFile users.

To send a file that has already been uploaded:

1. Check the box next to the file.
2. Click the "Send" button.
3. Enter the email addresses of who you would like to send to.
    - The recipients do not need to be ShareFile users.
    - You may enter a comma separated list of emails.
    - You may also add emails from your Address Book.
4. Enter a custom message for the recipients.
5. Optionally you can preview what the email will look like.
6. Optionally you can be CC'd on the email.
7. Optionally you can request a notification email when the file has been downloaded.
8. Optionally you can require recipients to log in before downloading.
    - If the recipients are new to ShareFile they will be emailed a temporary password.
    - This option provides an extra layer of security by preventing public access to the download link sent in the email.
9. Optionally you can choose an expiration date for download access.
10. Click the "Send" button.

Notes and URLs

In addition to uploading files, if you have upload permission to a folder, you can also add Notes and URLs to folders you create.
A Note is simply a textual note. A URL is a link to a web site.