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UNIVERSITY OF CALGARY | Secure Compute Services

USER GUIDE – EXTERNAL USERS

ShareFile

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Business Analyst

November 20, 2019

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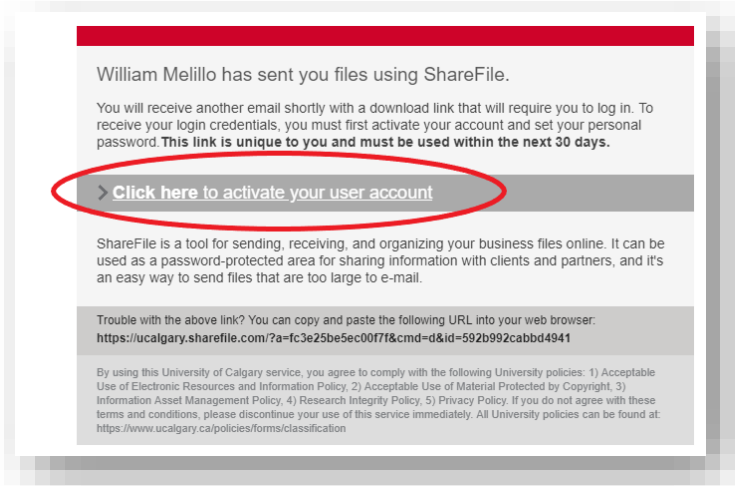
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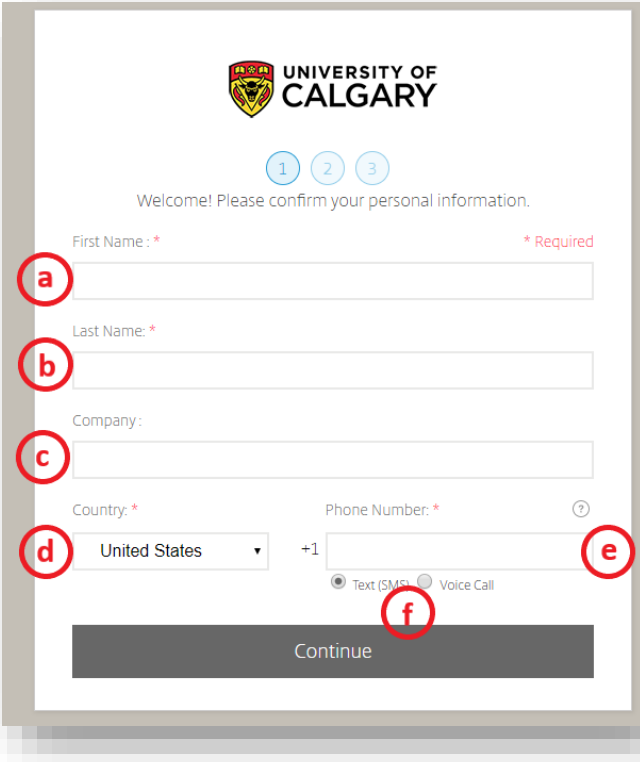
1 GLOSSARY OF TERMS

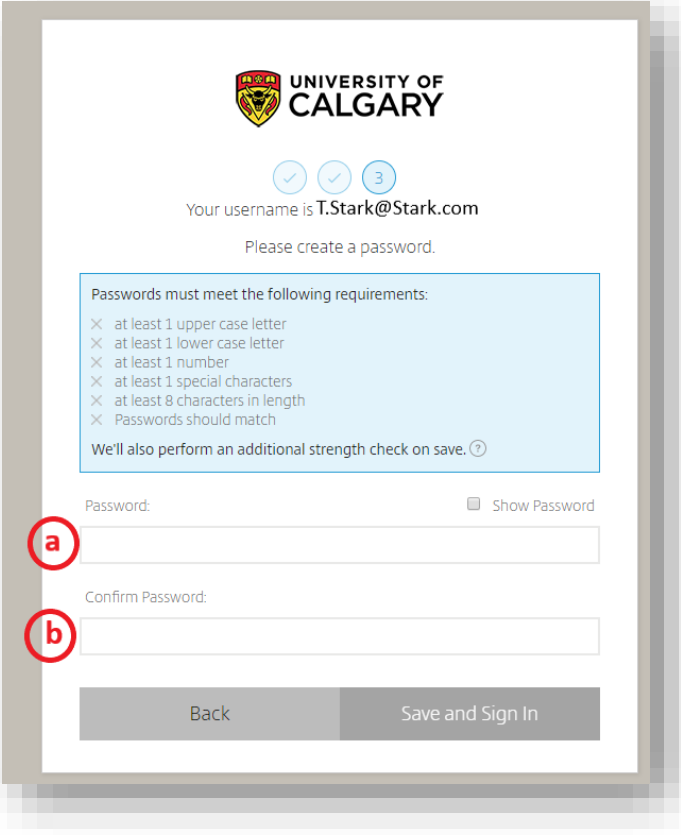
Definition	Description
ShareFile	ShareFile is a tool for sending, receiving, and organizing your business files online. It can be used as a password-protected area for sharing information with clients and partners, and it's an easy way to send files that are too large to e-mail. This rollout of ShareFile is specific to UCalgary SCDS groups (see further definition below).
Multi-Factor Authentication (MFA)	Multi-factor authentication (MFA) is an authentication method in which a user is granted access only after successfully presenting two or more factors to an authentication mechanism: knowledge (something only the user knows i.e. password), possession (something only the user has (i.e. mobile device), and inherence (something only the user is i.e. biometrics).
Level 4 data	Level 4 data would cause severe harm to individuals or the University if disclosed. Level 4 information includes individually identifiable information which if disclosed would create risk of criminal liability, loss of insurability or employability, or severe social, psychological, reputational, financial or other harm to an individual or group.
Citrix Files	Is another name used by Citrix to refer to ShareFile.

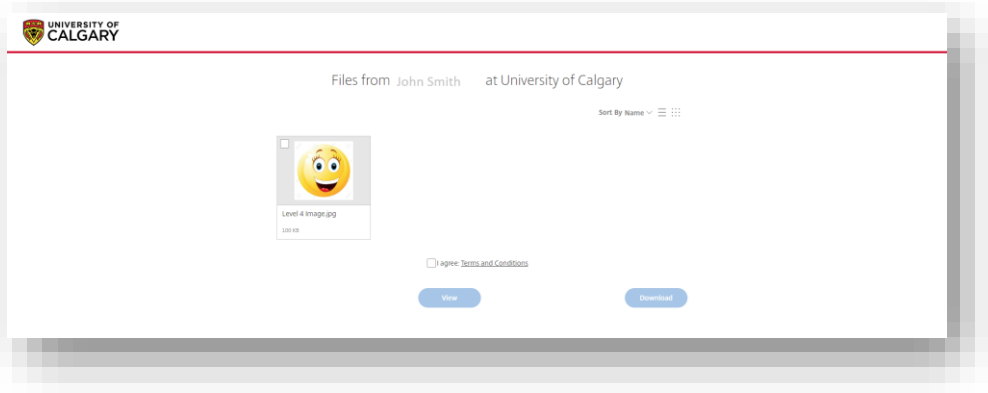
2 USING SHAREFILE.COM

2.1 CREATE A SHAREFILE ACCOUNT

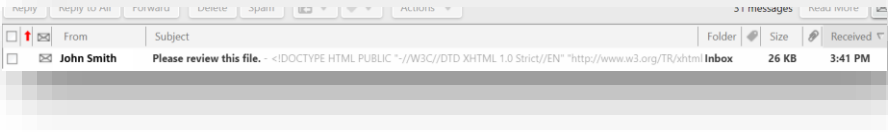
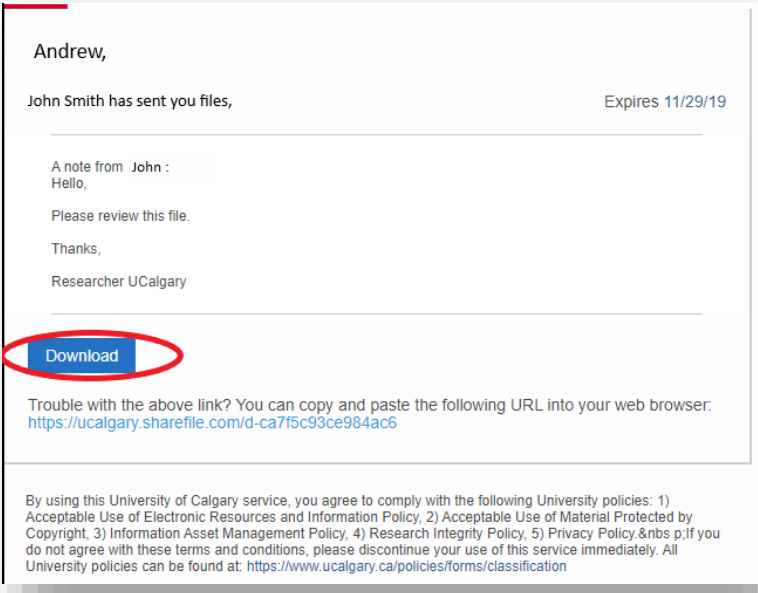
Step	Action / Explanation
<p>1. In your email inbox, open the email received from ShareFile.</p>	<p>The first time a file is shared with you or requested from you, you will receive an email from ShareFile with the subject “ShareFile Login Information”. You need to create an account by clicking on the “Click here to activate your account” link on the body of the email.</p> <div style="text-align: center; border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: 80%;">  </div>

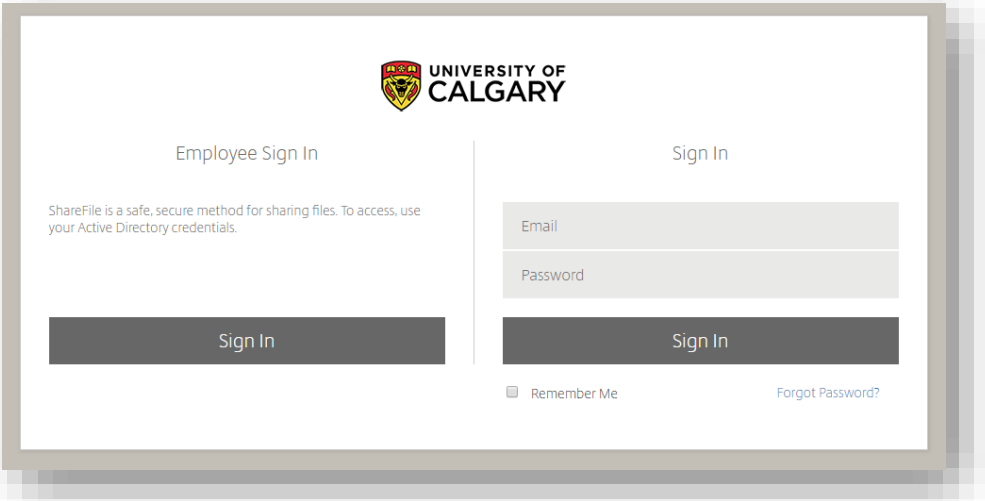
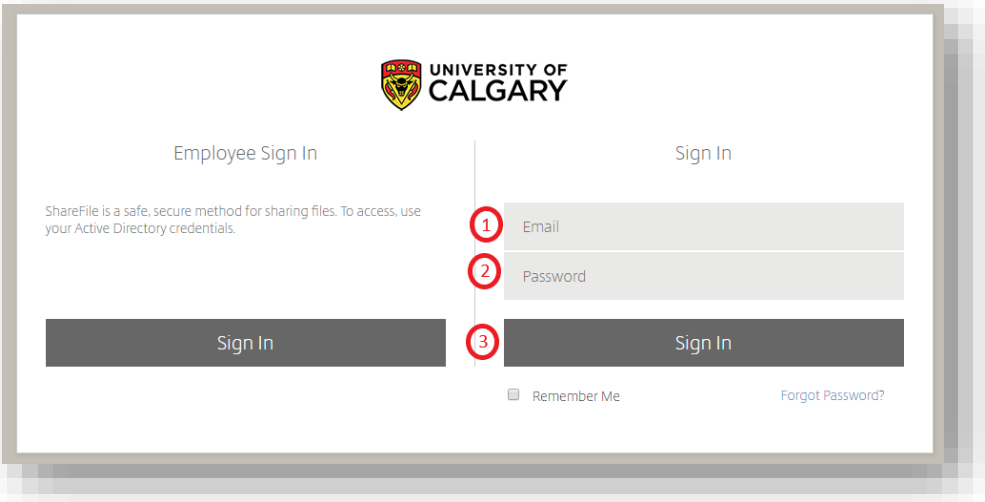
Step	Action / Explanation
<p>2. Confirm your personal information.</p>	<div style="text-align: center;">  </div> <p>a) Enter your first name b) Enter your last name c) Enter the name of your company (optional) d) Select your country of residence e) Enter the phone number that will be used for Multi-Factor Authentication (MFA) f) Select the proper option: a. Text (SMS) to receive your MFA code via text message b. Voice Call to receive your MFA code on a phone call g) Click "Continue"</p>

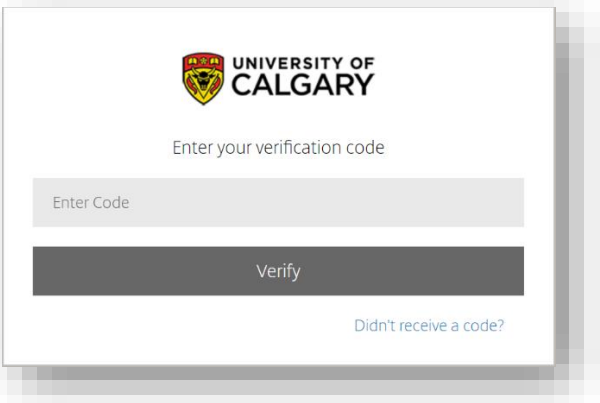
Step	Action / Explanation
<p>3. Create your password.</p>	<div style="text-align: center;">  </div> <p>a) Enter a password with the following criteria:</p> <ol style="list-style-type: none"> a. At least one upper case letter b. At least one lower case letter c. At least one number d. At least one special character e. At least eight (8) characters in length <p>b) Re-enter the same password</p> <p>c) Click on “Save and Sign In”</p>
<p>4. You are now logged in.</p>	<p>The example below shows the landing page when a file has been shared with you with Download access.</p>

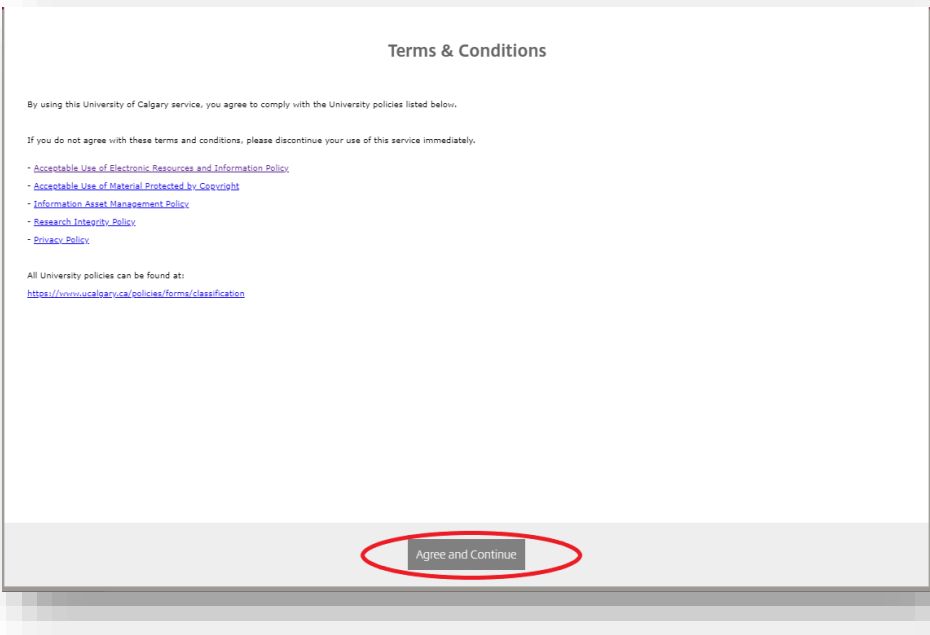
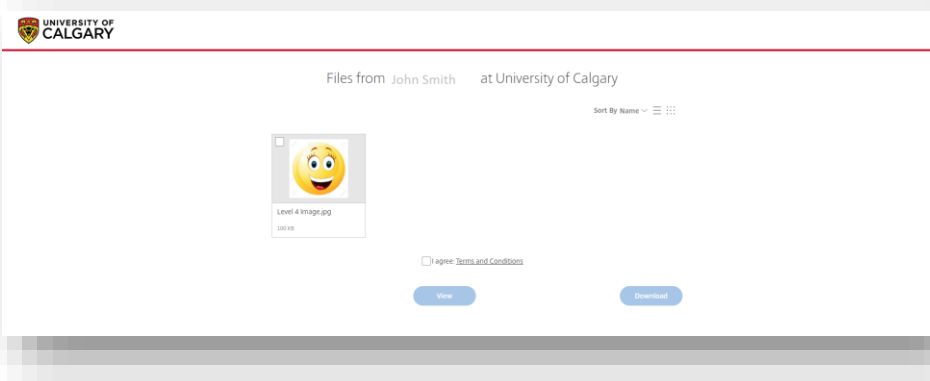
Step	Action / Explanation
	

2.2 LOG IN

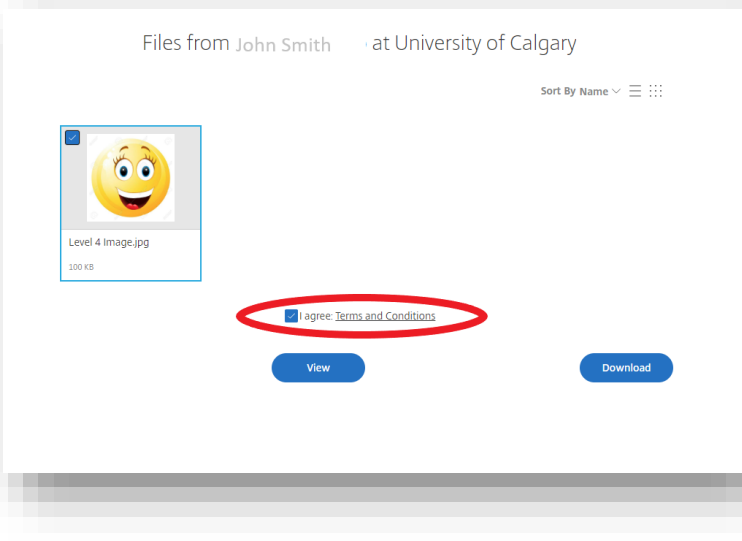
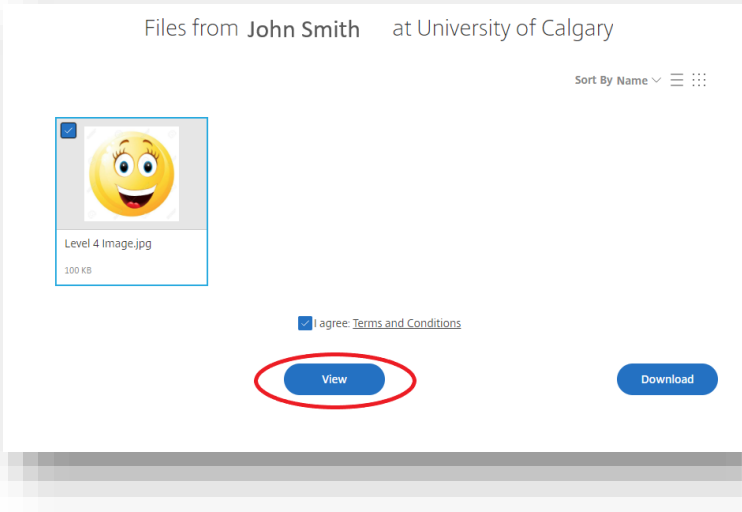
Step	Action / Explanation
<p>1. In your email Inbox, select the message coming from ShareFile.</p>	
<p>2. On the body of the email click on the action button.</p> <p>This example shows the “Download” button.</p>	
<p>3. This will bring you to the ShareFile Sign In page.</p>	<p>Supported Browsers: Chrome (latest version), FireFox (latest version), Internet Explorer 11 (or higher), Microsoft Edge, and Safari (10 or higher).</p>

Step	Action / Explanation
	
<p>4. Enter your email address and password.</p>	 <ol style="list-style-type: none"> 1. Enter your email 2. Enter your password 3. Click on "Sign In"

Step	Action / Explanation
<p>5. Enter the verification code received via text message or phone call.</p>	<div data-bbox="435 331 1031 730" style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;">  </div> <ul style="list-style-type: none"> • Enter the code you received • Click on “Verify”
<p>6. Read the terms and conditions.</p>	<div data-bbox="435 934 1404 1459" style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: right;">Terms & Conditions</p> <p>By using this University of Calgary service, you agree to comply with the University policies listed below.</p> <p>If you do not agree with these terms and conditions, please discontinue your use of this service immediately.</p> <ul style="list-style-type: none"> - Acceptable Use of Electronic Resources and Information Policy - Acceptable Use of Material Protected by Copyright - Information Asset Management Policy - Research Integrity Policy - Privacy Policy <p>All University policies can be found at: https://www.ucalgary.ca/policies/forms/classification</p> </div>

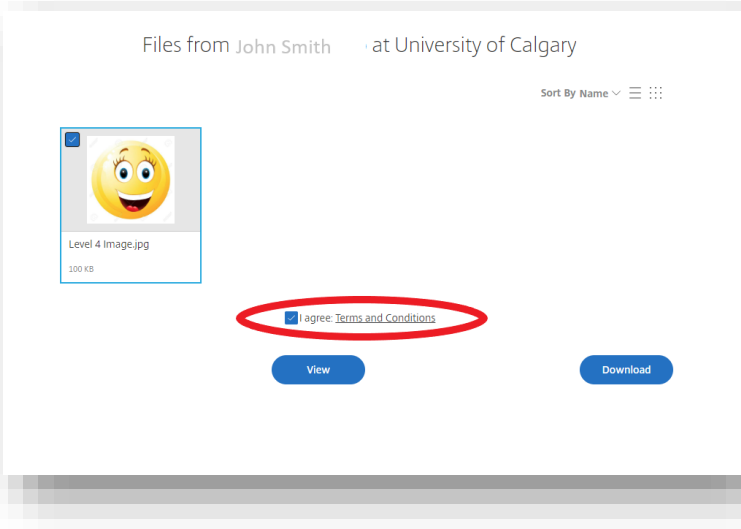
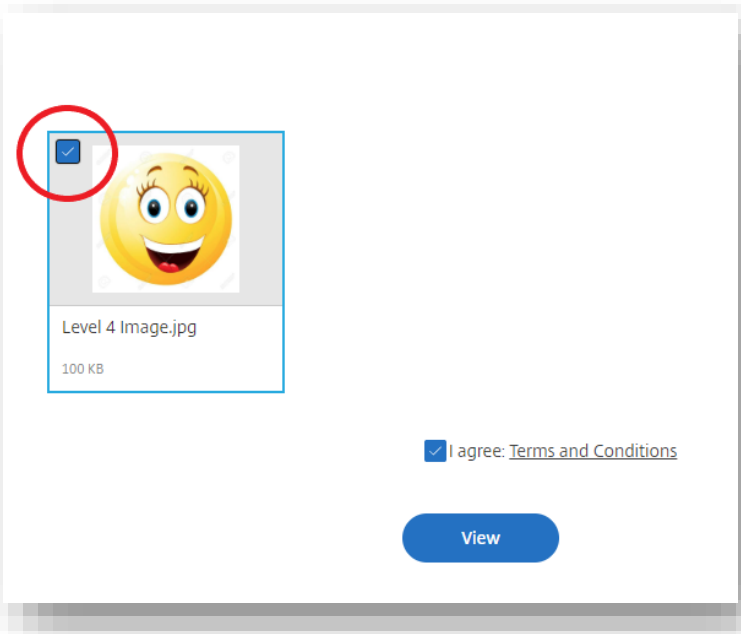
Step	Action / Explanation
<p>7. Click on “Agree and Continue”.</p>	 <p>The screenshot shows a 'Terms & Conditions' page. At the bottom, the 'Agree and Continue' button is circled in red.</p>
<p>8. You are now logged in.</p>	<p>The example below shows the landing page when a file has been shared with you with Download access.</p>  <p>The screenshot shows a file sharing interface with a file named 'Level 4 Image.jpg' and a 'Download' button.</p>


2.3 VIEW A FILE SHARED WITH YOU

Step	Action / Explanation
1. Follow the steps to log in.	See “LOG IN” instructions
2. On the landing page, read and agree to the terms and conditions.	 <p>Files from John Smith at University of Calgary</p> <p>Sort By Name ▾ ☰ ☰</p> <p><input checked="" type="checkbox"/> I agree: Terms and Conditions</p> <p>View Download</p>
3. Click on “View”.	 <p>Files from John Smith at University of Calgary</p> <p>Sort By Name ▾ ☰ ☰</p> <p><input checked="" type="checkbox"/> I agree: Terms and Conditions</p> <p>View Download</p>


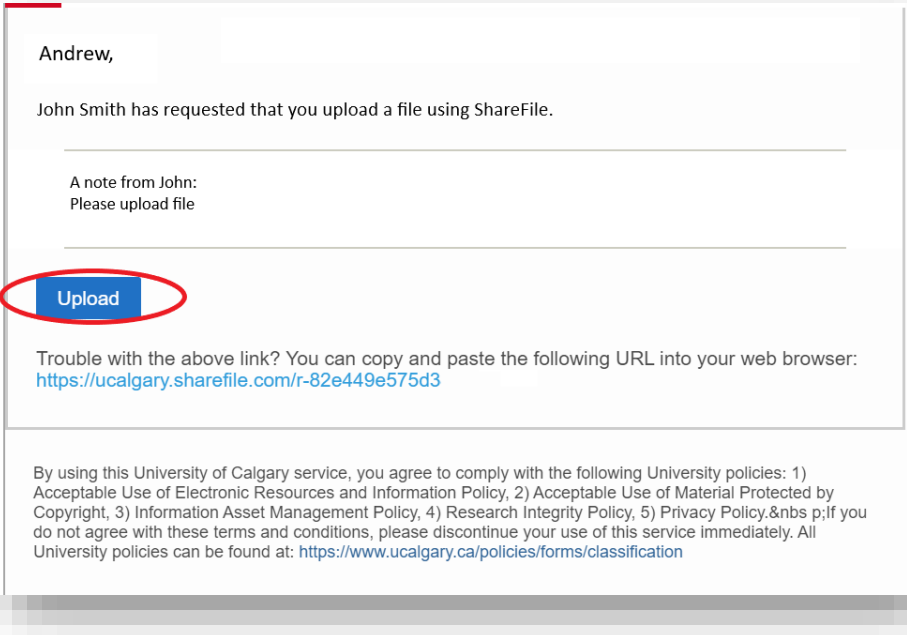
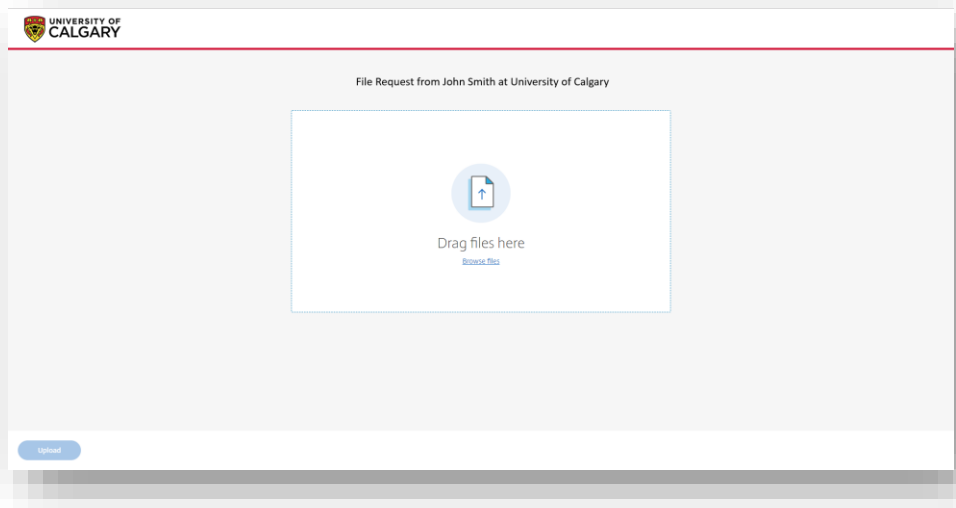
Step	Action / Explanation
<p>4. You will be presented with a preview of the file.</p>	<div data-bbox="446 336 1339 787" data-label="Image"> </div> <p>* If you also have permission to download, you can download it from here.</p>

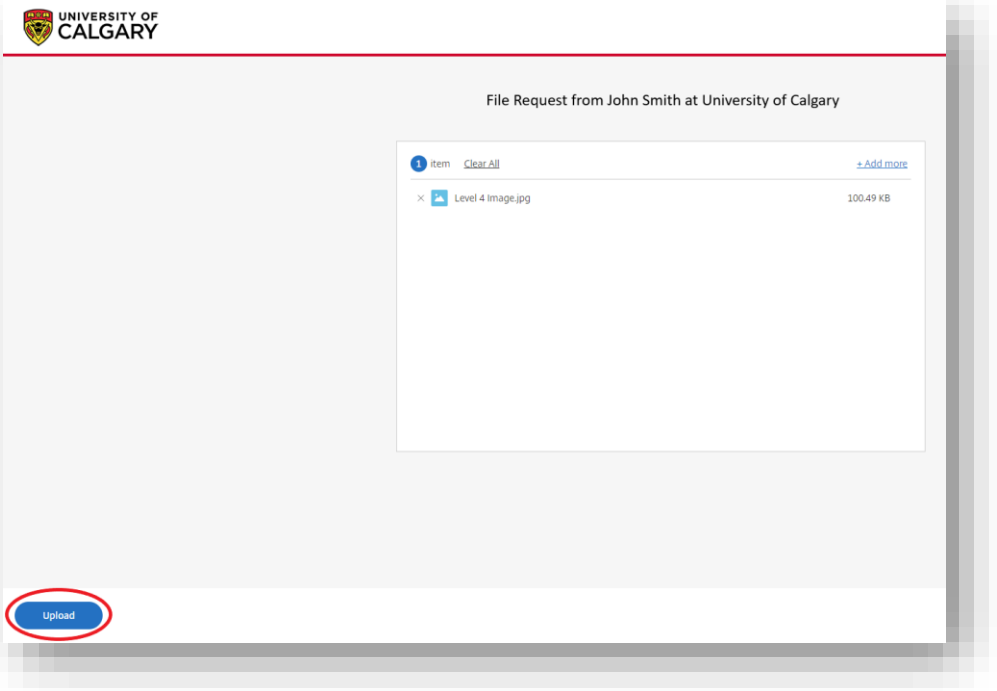

2.4 DOWNLOAD A FILE SHARED WITH YOU

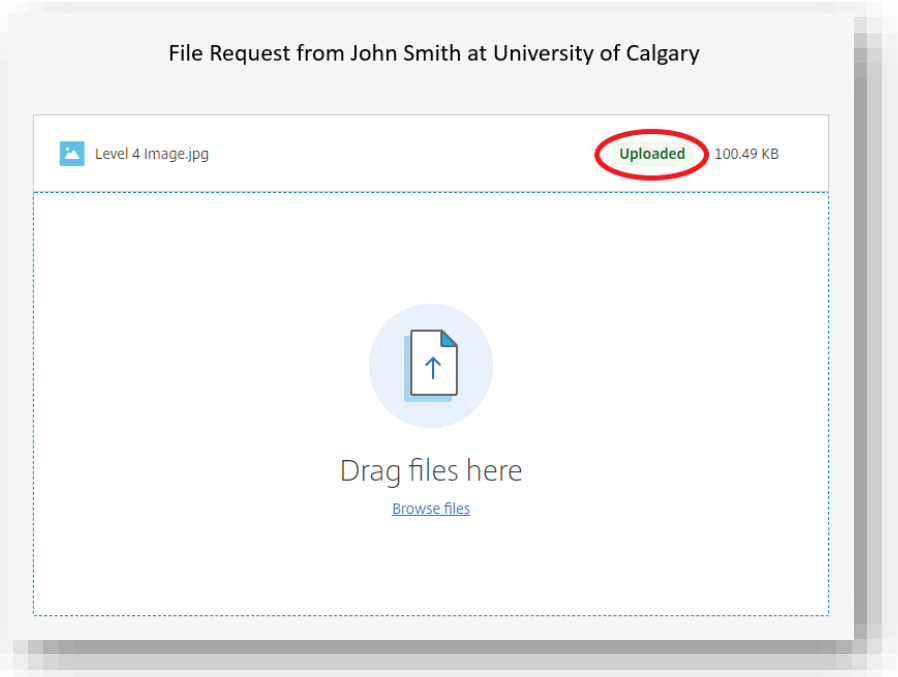

Step	Action / Explanation
1. Follow the steps to log in.	See “LOG IN” instructions
2. On the landing page, read and agree to the terms and conditions.	
3. Select the file to download.	

Step	Action / Explanation
<p>4. Click on “Download”.</p>	<div style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center;">Files from John Smith at University of Calgary</p> <p style="text-align: right;">Sort By Name ▾ ☰ ☰</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <input checked="" type="checkbox"/>  <p>Level 4 Image.jpg 100 KB</p> </div> <p style="text-align: center;"><input checked="" type="checkbox"/> I agree Terms and Conditions</p> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> View Download </div> </div> <p>* If the “Download” button is not present in your screen it means you can only view the file online</p>

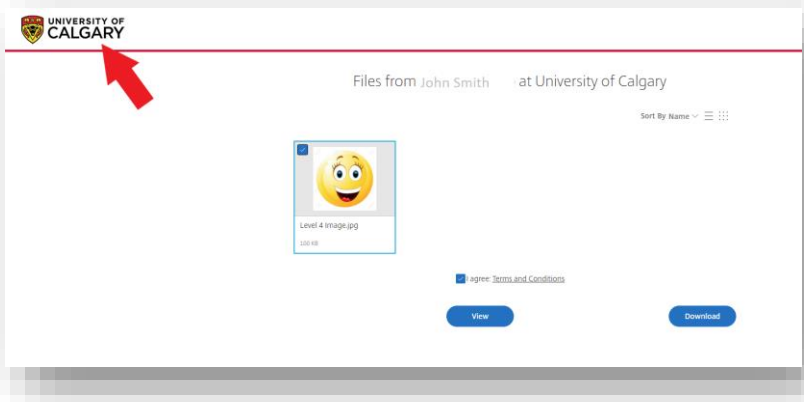
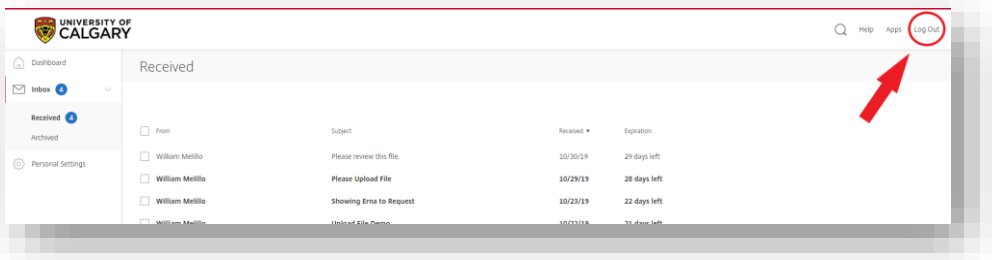
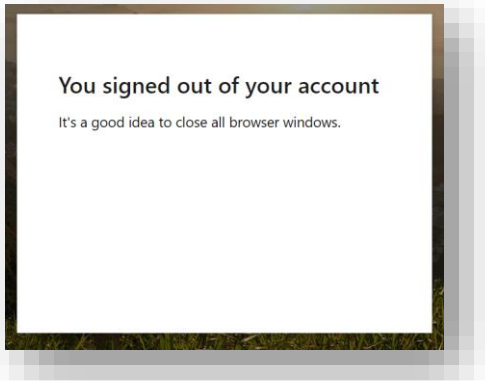
2.5 UPLOAD A FILE REQUESTED FROM YOU

Step	Action / Explanation
<p>1. In your email Inbox, select the message coming from ShareFile.</p>	
<p>2. On the body of the email click on "Upload".</p>	 <p>Andrew,</p> <p>John Smith has requested that you upload a file using ShareFile.</p> <p>A note from John: Please upload file</p> <p>Upload</p> <p>Trouble with the above link? You can copy and paste the following URL into your web browser: https://ucalgary.sharefile.com/r-82e449e575d3</p> <p>By using this University of Calgary service, you agree to comply with the following University policies: 1) Acceptable Use of Electronic Resources and Information Policy, 2) Acceptable Use of Material Protected by Copyright, 3) Information Asset Management Policy, 4) Research Integrity Policy, 5) Privacy Policy.&nbs p;if you do not agree with these terms and conditions, please discontinue your use of this service immediately. All University policies can be found at: https://www.ucalgary.ca/policies/forms/classification</p>
<p>3. You can now drag and drop the file to upload or browse for it.</p>	 <p>UNIVERSITY OF CALGARY</p> <p>File Request from John Smith at University of Calgary</p> <p>Drag files here Browse files</p> <p>Upload</p>

Step	Action / Explanation
<p>4. Once the file is loaded, click on "Upload".</p>	
<p>5. You can pause or stop the upload process at any time during the progress.</p>	 <p>To pause the upload process click on </p> <p>To stop the upload process click on X</p>

Step	Action / Explanation
<p>6. The file will show as “Uploaded” when the process is complete.</p>	 <p style="text-align: center;">File Request from John Smith at University of Calgary</p> <p>Level 4 Image.jpg Uploaded 100.49 KB</p> <p style="text-align: center;">  Drag files here Browse files </p>

2.6 LOG OUT

Step	Action / Explanation
<p>1. On the View or Download landing page or the File Upload page, click on the University of Calgary logo.</p>	 <p>This will take you to the ShareFile Inbox page</p>
<p>2. From the ShareFile Inbox page, click on “Log Out” on the top right corner.</p>	
<p>3. You will be signed out of ShareFile and all the different levels of authentication you went through during Log In.</p>	

3 GETTING SUPPORT

To obtain support, External Users can:

1. Visit <https://www.sharefile.com/support>
2. Contact Citrix at: 1-800-4-Citrix (1-800-424-8749)