Appendix 1

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Managing Your Firm Information

Staff who have File Share administrator privileges can update firm level information and options on the Firm Information page.

Tasks that can be accomplished on this page are:

- Firm profile information updates
- 2-Step Verification (i.e., Multi-factor Authentication or MFA) enabling/disabling

  ⚠️ **Important**: 2-Step Verification uses a second factor (email or phone) in addition to a password for verifying user identity during the log in process. When enabled, a verification code is sent to users via email or phone which they must use to complete their log in. We recommend that your firm leave 2-Step Verification enabled for the protection of your sensitive client data.

- Designation of firm users that can receive uploaded client files
- Editing of automated emails that are sent to users

Click a link below to learn how to perform each of these tasks.

Update the firm profile information in File Share.

1. Log in to File Share.
2. Click **Firm Information**.
3. On the Profile tab, edit the firm's contact information as needed.

Item	Description
Firm Name	Displays the firm name. This field cannot be edited.
Address	Edit the street address for the firm.
City	Edit the city for the firm.
State	Edit the state for the firm.
ZIP code	Edit the ZIP code for the firm.

Item	Description
Phone Number	Edit the phone number for the firm.
Fax Number	Edit the fax number for the firm.
Contact Email Address	Select the email address to be used for the firm. The email addresses available in this list are for users who are set up as administrators. See Managing Users for information on assigning administrative privileges. **Note**: The address selected for this field is the firm admin address that will display in the upper-left corner of File Share.
Contact's Name	Displays the name of the user whose email address is selected above. This field cannot be edited.

4. In the list of users at the bottom of the page, select the box for each administrative or staff user whose name should be listed on the File Upload screen when clients upload files. Client users must select one of the firm employees listed here as the recipient of uploaded files.

   Note: If you do not select any users on this page, clients must enter the email address of the administrator or staff user to whom they want to send their files.

5. Click **Update**

Enable or disable 2-Step Verification (i.e., Multi-factor Authentication or MFA) in File Share.

1. Log in to File Share.
2. Click **Firm Information**.
3. Select **Enable Multi-factor Authentication (MFA)** to enable 2-Step Verification. Deselect the box to disable 2-Step Verification.

   Important: All File Share users must have a valid email address or phone number on their Personal Profile page for use if 2-Step Verification is enabled. This ensures that if prompted, they can receive and input a 2-Step Verification code to successfully log in. File Share administrators can add or update user phone numbers on User Edit pages allowing those with invalid or forgotten contact information to receive a 2-Step Verification code and successfully log in. These users should be encouraged to update their email and phone information on their Personal Profile page after successfully logging in.

4. Click **Update**.

Select firm users who can receive files through File Share.

1. Log in to File Share.
2. Click **Firm Information**.
3. In the list of users at the bottom of the page, select the box for each administrative or staff user whose name should be listed on the File Upload screen when clients upload files. Client users must select one of the firm employees listed here as the recipient of uploaded files.

📙 **Note**: If you do not select any users on this page, clients must enter the email address of the administrator or staff user to whom they want to send their files.

4. Click **Update**.

Modify an automated email that is sent to users from File Share.

1. Log in to File Share.
2. Click **Firm Information**.
3. Click the **Emails** tab. You can modify any of the following automated emails that are sent from File Share.
4. Do one of the following as needed for the automated emails that are sent from File Share:
   - Click **Restore** next to an email to remove any customizations you have made to the email. The default email provided by File Share is restored.
   - Click **Edit** next to an email to open the email message. Edit and format the email as needed, and then click **Save**.

   ⚠️ **Important**: By default, some of the automated emails contain keywords which begin with FS_. These keywords are replaced with user-specific values when the email is sent. To ensure that the user receives all the needed information to access File Share, do not remove these keywords.

   Tell me more about the automated emails.

File Share Welcome	Sent to each new user of File Share when the user is created. The default email includes a link to the page where the user can create a password.
Reset Password	Sent to a user when the user requests to reset his or her password. The default email includes a link to the reset password page.
File Share Account Activation	Sent to a user when a new account is activated. The default email includes a link to the File Share Login page.
File Share File Notification	Sent to a user when a file uploaded to File Share is assigned to the user.
File Share Download Notification	Sent to a user when a file uploaded by the user is downloaded by another user. **Note**: This notification is not enabled by default. It must be enabled in the user profile.
Reset Password by Administrator	Sent to a user when the administrator resets the user's password.
Failed File Share Upload	Sent to a user whose attempt to upload a file fails.

Editing User Information

File Share administrators can activate or deactivate a user's account on the User Edit page for that user. Other tasks that an administrator can perform for a user include:

- Add/update a user phone number
- Assigning a user type
- Granting or removing the ability to upload files
- Setting a maximum number of megabytes that can be uploaded to File Share

⚠ **Important**: All File Share users must have a valid email address or phone number on their Personal Profile page for use if 2-Step Verification is enabled. This ensures that if prompted, they can receive and input a 2-Step Verification code to successfully log in. File Share administrators can add or update user phone numbers on User Edit pages allowing those with invalid or forgotten contact information to receive a 2-Step Verification code and successfully log in. These users should be encouraged to update their email and phone information on their Personal Profile page after successfully logging in.

To perform any of these tasks, do the following:

1. Log in to File Share.
2. Click **User Administration** to view a list of File Share users.
3. Locate the user whose information you need to manage by using the navigation tools.

Button	Action
Search:	Enter the user name or file extension. The search occurs as you type, so you may only need to enter the first few characters to find a name.
Show 25 ▼ entries 25 50 100 All	Select the number of names to display per page.
◀ ▶	Click to move between pages in the list of users
Column Heading	Click a column heading to sort the list in either ascending or descending order by that item.

4. Click the edit user button 👤 for the user.
5. Select appropriate options for the user.

Field	Description
First Name	Enter the user's first name.
Last Name	Enter the user's last name.

Field	Description
New Password	Use this field to enter a new password if the user requests a password reset. If the user does not request a reset, you should not enter anything in this field.
Confirm New Password	If you create a new password for the user, reenter the password here to confirm it. You will not use this field unless the user requests that you reset the password. **Note**: After you change a user's password, an automated email is sent to the user. This email informs the user that the password has changed, but does not include the new password. You must communicate the new password to the user via phone or email.
E-mail Address	Enter the user's email address.
Phone Number	Enter the user's phone number. (Example: +1 555-555-5555)
Account Active	Select **Yes** to make the user active. Select **No** to make the user inactive.
User Type	Select the user type for the user. The user types that are available are: ■ **Admin**. Users with rights to create, modify, and delete File Share users. Admin users can access all files on the File Share site. They also can modify the firm information for the File Share site and upload firm files that are available to all users. ■ **Staff**. Users who work for the firm providing the File Share site. Staff members with upload rights can upload files to any user and can create new users via file uploads. They can also upload firm files and be selected to display on the list of users that clients can upload files to. **Note**: Staff users do not have access to the User Administration window, and so cannot create users using the manual user creation process. See *Adding File Share Users* on page 7 for more information. ■ **Client**. Users who are clients of the firm providing the File Share site. Client users can upload files to staff members. They also can download files assigned to them and any firm files. **Important**: Users with administrator privileges can access all files uploaded to File Share for your firm. For this reason, administrator privileges should never be given to client users.
Upload Files	Select **Yes** if the user should have permission to upload files. Select **No** if the user should not have permission to upload files.
CC this user on all their file uploads by default	Select **Yes** to send this user a copy of the File Share upload email that the recipient receives when the user uploads a file. Select **No** if the user should not be copied on the upload email.

Field	Description
Receive notification when another user has downloaded your file	Select **Yes** if this user should receive a notification email when someone downloads a file uploaded by that user. Select **No** if the user should not receive a notification email for file downloads.
Upload File Limit	Enter the maximum amount of file space (in megabytes) that should be available to the user for uploading files. The quota only applies to files uploaded by the user, not to files uploaded by other people and assigned to the user.

Note: You cannot set a file limit that is less than the amount of space currently being consumed by the user.

6. Click **Submit**.

Adding File Share Users

New users can be added to File Share in the following ways:

- **Via file uploads**. Admin and staff File Share users can create new users when they upload files for the users. Users created this way will not have the right to upload files. They will only be able to download the files uploaded for them. See *Uploading Files* on page 10 for instructions on creating new users this way.

- **Self registration**. Staff or client File Share users can register themselves as new users by completing the New User Registration form. This form is accessible from the File Share log in page. Once a user has submitted a registration, the File Share administrator must activate the new account before the user can access File Share.

- **On the User Administration page**. Admin users of File Share can create new users on the User Administration page.

⚠️ **Important**: All File Share users must have a valid email address or phone number on their Personal Profile page for use if 2-Step Verification (i.e., Multi-factor Authentication or MFA) is enabled. This ensures that if prompted, they can receive and input a 2-Step Verification code to successfully log in.

Click the links below for instructions on each method of creating new users.

Creating a New User By Self Registration

1. On the File Share login page, click **New User Registration**.
2. Enter the requested information.

Field	Description
First Name	Enter your first name.
Last Name	Enter your last name.
Email Address	Enter your email address.
Phone Number	Enter your phone number. (Example: +1 555-555-5555)
Password	Enter a password. Passwords must be at least eight characters long and include three of the following: ▪ A lowercase letter ▪ An uppercase letter ▪ A number ▪ A special character
Confirm Password	Reenter the password.
CC this user on all their file uploads by default	Select **Yes** if you want to receive copies of the emails that File Share sends when you upload a file to another File Share user. Select **No** if you do not want to receive copies of these emails.

Field	Description
Receive notification when another user has downloaded your file	Select **Yes** if you want to receive a notification email when someone downloads a file you uploaded. Select **No** if you do not want to receive a notification email for file downloads.

3. Select the **I have read and accept the Terms of Service** box.
4. Click **Submit**.

Once a new registration is submitted, an email notifies the administrator that a new user has applied for an account. The email includes instructions for activating the new account. Instructions for activating an account are also included in the topic Managing Users.

Creating a New User as an Administrator

1. Log in to File Share.
2. Click **User Administration**.
3. Click **Add User**.
4. Enter the requested information.

Field	Description
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
E-mail Address	Enter the user's email address.
Phone Number	Enter the user's phone number. (Example: +1 555-555-5555)
Account Active	Select **Yes** to make the user active. Select **No** to make the user inactive.
User Type	Select the user type for the user. The user types that are available are: ▪ **Admin**. Users with rights to create, modify, and delete File Share users. Admin users can access all files on the File Share site. They also can modify the firm information for the File Share site and upload firm files that are available to all users. ▪ **Staff**. Users who work for the firm providing the File Share site. Staff members with upload rights can upload files to any user and can create new users via file uploads. They can also upload firm files and be selected to display on the list of users that clients can upload files to. 📝 **Note**: Staff users do not have access to the User Administration window, and so cannot create users using the manual user creation process. See *Adding File Share Users* on the previous page for more information. ▪ **Client**. Users who are clients of the firm providing the File Share site. Client users can upload files to staff members. They also can download files assigned to them and any firm files.

Field	Description
	⚠ **Important**: Users with administrator privileges can access all files uploaded to File Share for your firm. For this reason, administrator privileges should never be given to client users.
Upload Files	Select **Yes** if the user should have permission to upload files. Select **No** if the user should not have permission to upload files.
CC this user on all their file uploads by default	Select **Yes** to send this user a copy of the File Share upload email that the recipient receives when the user uploads a file. Select **No** if the user should not be copied on the upload email.
Receive notification when another user has downloaded your file	Select **Yes** if this user should receive a notification email when someone downloads a file uploaded by that user. Select **No** if the user should not receive a notification email for file downloads.
Upload File Limit	Enter the maximum amount of file space (in megabytes) that should be available to the user for uploading files. The quota only applies to files uploaded by the user, not to files uploaded by other people and assigned to the user.

5. Click **Submit**.

Managing Your User Profile

You can update your first name, last name, email address, and phone number on the My Profile page. You can also access the page where you can reset your password. To update your profile, do the following:

1. Log in to File Share.
2. Click **My Profile** on the navigation panel.
3. Enter or edit your profile information as needed.

Field	Description
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
E-mail Address	Enter the user's email address.
Phone Number	Enter the user's phone number. (Example: +1 555-555-5555)
CC this user on all their file uploads by default	Select **Yes** if you want to receive a copy of the File Share upload email that is sent to the recipient when you upload a file. Select **No** if you do not want to be copied on the upload email.

Field	Description
Receive notification when another user has downloaded your file	Select **Yes** if you want to receive a notification email when someone downloads a file you uploaded. Select **No** if you do not want to receive a notification email for file downloads.

4. If needed, update your password.

   a. Click **Change Password**.

   b. Enter your old and new password, and then enter your new password again to verify it.

      Passwords must be at least eight characters long and include three of the following:

      ▪ A lowercase letter

      ▪ An uppercase letter

      ▪ A number

      ▪ A special character

   c. Click **Update**.

5. Click **Update**.

⚠ **Important**: All File Share users must have a valid email address or phone number on their Personal Profile page for use if 2-Step Verification (i.e., Multi-factor Authentication or MFA) is enabled. This ensures that if prompted, they can receive and input a 2-Step Verification code to successfully log in.

Uploading Files

Depending on your rights, you can use the Uploading Files page to do the following:

- Upload and assign files
- View your available disk space on File Share
- Create new users

When you upload a file, the person the file is assigned to will receive an email. The email will contain a link to the File Share account where the file can be accessed. You can also customize this email.

To upload files, do the following:

1. Verify that the file you want to upload is not open or in use. Attempting to upload a file that is open or in use can cause upload errors.

2. Log in to File Share.

3. Click **Upload Files** in the navigation panel.

4. Select the person to whom you want to assign the uploaded file. The options available depend on your File Share role.

   ▪ Administrative and staff users

      Choose from the following options:

- **Existing user**. If you select this option, you also must select the person to send the file to. Select this person from the list displayed beneath the Assign To field.

  💡 **Tip**: You can sort the list by any column or search for a specific user. You also can control the number of clients that display.

- **All users**. Selecting this option grants access to the file to any File Share user. These files will appear on the Firm Files page.

  📝 **Note**: By default, no email notification is sent when this option is selected. You can override this default by selecting the **Send an email to all users** check box.

- **New user**. Select this option to create a new user. You must have the new user's first and last name, email address, and phone number. An email will be sent to the user with a prompt to activate the account.

  ⚠️ **Important**: All File Share users must have a valid email address or phone number on their Personal Profile page for use if 2-Step Verification (i.e., Multi-factor Authentication or MFA) is enabled. This ensures that if prompted, they can receive and input a 2-Step Verification code to successfully log in.

- ▪ Client users

  You can do one of the following, depending on how the firm has configured File Share:

  - Select a recipient from the list of firm administrators. This option is only available if the firm has selected firm administrators to display in the list. See *Managing Your Firm Information* on page 1 for more information.

    📝 **Note**: To help you locate a firm administrator in the list, you can enter part of the administrator's name or email address in the Search box. You can also change the sort order by clicking the upward or downward arrows beside a column name.

  - Enter the email address of the administrator in the Assigned To box. A message beneath the field will indicate whether the email address is a valid File Share administrator. This option is available when the firm has not selected administrators to display in a list.

    💡 **Tip**: If you do not know which firm administrator to send the file to, enter the Firm Admin address displayed in the upper left corner of the File Share screen.

5. Click **Next**.
6. In the *Select files* section, click **Add files**.
7. Browse to the file you want to upload, and then click **Open**.
8. Repeat steps 5 and 6 for each additional file you need to upload.

9. If needed, customize the text in the Subject and Message boxes in the Edit Email section of the window.

🗒️ **Note**: Edits you make to the default letter will apply only to this upload. You cannot save your changes to the default letter or otherwise replace the default letter.

10. If needed, use the formatting tools below the Message box to format the text of the email.

11. If you want to be copied on the email that is sent to the recipient, select **CC me on this email**.

12. Click **Upload and Send Email**. After the upload is complete, the file will be listed on the Files Sent page. The file recipient will receive an email with a link to log in to your firm's File Share account. The email will contain a list of all files uploaded during this session.

Required Setup for New Users Created When Uploading Files

New users created via file upload receive an email with a link they can use to set up their account. They must complete this set up before they can view the file assigned to them.

1. Click the link in the File Notification email that was sent from File Share when the administrator uploaded a file to the user.

🗒️ **Note**: The activation link expires seven days after it is sent.

2. Enter and confirm the password.

Passwords must be at least eight characters long and include three of the following:

- A lowercase letter
- An uppercase letter
- A number
- A special character

3. Select the **I have read and accept the Terms of Service** box.

4. Click **Submit**. The new user can now log in to view the file assigned to them.

Logging in to File Share

The File Share Login page allows you to log in, reset your password, or complete a new user registration form.

Click a link below to learn how to perform each of these tasks.

Logging in to File Share**.**

1. Enter your email address.

2. Enter your password. Show me what the password must include.

   - At least eight characters
   - At least three of the following:
       - Uppercase letter
       - Lowercase letter
       - Number
       - Special character

3. Click **Log-In**. If 2-Step Verification is disabled, you are logged directly into File Share. If 2-Step Verification is enabled and you are prompted to verify your identity, continue to the next step.

4. To verify your identity, select one of the following:

   - **Email**. Sends a verification code to your email address.
   - **Text message**. Sends a verification code to your phone number.
   - **Voice message**. Sends a verification request to your phone number.

   Note: The contact methods displayed are derived from your Personal Profile page. Maintaining a valid email address or phone number in your profile is critical to ensure your ability to successfully log in with 2-Step Verification (i.e., Multi-factor Authentication or MFA) enabled.

5. Click **Send the code**.

6. Retrieve and submit your verification by either:

   - Opening the email or text, retrieving the code, and entering it on the Verify Your Identity window.
   - Answering the phone and selecting the pound (#) key to acknowledge your identity.

   Note: The verification code is valid for 10 minutes. If needed, you can resubmit your request.

7. *If you are using a private and secure device* you can select the **Trust this device for 30 days** option to bypass the 2-Step Verification process for the specified number of days.

   Important: Do not select this option if your device is public, shared, or accessible by anyone else. Selecting the option allows anyone using the same device and browser to bypass the 2-Step Verification process.

   Notes:

   - This option will only bypass 2-Step security on the same device and browser used when the option was selected.
   - Reversing your selection of this option is accomplished by deleting your browser cookies. Instructions for this can be found in our WK Knowledge Base.

10. If you selected the email or text option, click **Submit** to open the File Share home page. If

you selected the voice message option then you will be automatically redirected to the File Share home page upon call response approval.

Resetting Your File Share Password.

1. Click **Forgot Password?**.
2. Enter your email address on the Forgot Password page.
3. Click **Submit**.
4. Click on the password reset link in the email you receive. The emailed link expires after eight hours.
5. Enter and confirm your new password on the Set Your Password page.
6. Click **Submit**.
7. Select **Click here to login** to return to the Login page and log in using your new password.

New User Registration in File Share.

1. On the File Share login page, click **New User Registration**.
2. Enter the requested information.

Field	Description
First Name	Enter your first name.
Last Name	Enter your last name.
Email Address	Enter your email address.
Phone Number	Enter your phone number. (Example: +1 555-555-5555)
Password	Enter a password. Passwords must be at least eight characters long and include three of the following: ▪ A lowercase letter ▪ An uppercase letter ▪ A number ▪ A special character
Confirm Password	Reenter the password.
CC this user on all their file uploads by default	Select **Yes** if you want to receive copies of the emails that File Share sends when you upload a file to another File Share user. Select **No** if you do not want to receive copies of these emails.
Receive notification when another user has downloaded your file	Select **Yes** if you want to receive a notification email when someone downloads a file you uploaded. Select **No** if you do not want to receive a notification email for file downloads.

3. Select the **I have read and accept the Terms of Service** box.
4. Click **Submit**.

Note: After the New User Sign Up form has been completed and submitted, the Firm Administrator will receive the request and activate the user account. User's will receive an email notification that their account is activated and may then log in with the email address and password they provided on their registration form.