



Site Builder® File Share

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File Share Overview

What is File Share?

File Share is a web-based document sharing application that provides clients, partners and associates with secure access to their files. File Share provides users basic file sharing capabilities like uploading, downloading and viewing files. Files may be uploaded to a specific user or shared to all users of the firm's File Share site.

Each standard Site Builder account receives firm-specific File Share URL.

NOTE: File Share is only for paid accounts and will not be accessible to Test Drive users.

Activating File Share

To activate and configure the File Share link for your website:

1. Log in to the Site Builder Wizard.
2. Select **Modules**.
3. Click **File Share** in the drop down menu.
4. Select the first "**Yes**" radio button to activate File Share.
5. Select the second "**Yes**" radio button to display the File Share Banner on your Home Page,.
6. Select the Banner style you wish to appear on your home page.
7. Click **Accept**.

When your File Share site is created, your firm will receive a File Share activation email. This email contains your File Share URL and login information. The activation email is sent to the Site Builder contact.

Additional Space

File Share includes 50 megabytes of space for Site Builder and eContent members. Members may purchase additional blocks of space on an annual basis. Each block adds 100MB to the File Share account.

To purchase blocks from the Site Builder Wizard:

1. Log in to the Site Builder Wizard.
2. Select **Modules**.
3. Select **File Share** in the drop down menu.
4. Click on the **Purchase** button.
5. Click **Upgrade/Downgrade Options**.
6. Enter the amount of storage you wish to add.
7. Click **Continue**.
8. Select your form of payment, either Mail-in Payment or Credit Card.
9. Click **Continue** to receive your Order Confirmation

You can also purchase additional transfer space by contacting the CCH Site Builder Sales Department at (877) 876-2470. Your additional space will be available as soon as your order is processed.

File Share System Requirements

Browser Requirements

Internet Explorer® 7 or more recent

Safari® for the Macintosh®

Firefox®

Google Chrome™

Browser Settings

JavaScript™ must be enabled, Silverlight® is highly recommended

For File Share uploads:

Silverlight, Flash, or HTML5 are required to upload files.

Additional Notes:

HTML5 is part of Firefox, Chrome and Safari.

Internet Explorer users must install either Flash or Silverlight.

Google Chrome users must have Silverlight installed to upload files. be enabled, Silverlight is highly recommended

Monitor Display Settings

File Share requires a resolution of at least 1024 X 768

File Share Functionality

Initial Login Page

Your website visitors can access your File Share site by clicking on the File share banner located on your home page. Clicking this banner opens the initial Log in Page which contains the following items:

System Requirements Link

Selecting the System Requirements Link opens a pop-up window listing the system requirements for the site.

Existing User Login Section

The existing user login section allows existing users to enter their user information to access the site.

Email Address

The email address field allows an unlimited amount of characters to be entered.

Password

The password field allows a maximum of 32 characters to be entered.

Login Button

When you select the Login Button, the system validates the email address and password information to verify that the user is valid. If the user is valid, the system checks that the browser meets the minimum system requirements. If the system meets the minimum requirements, the Received Files Page is displayed.

If the user fails validation, an error message appears asking you to try again.

Forgot Password Link

When you select the Forgot Password Link, you will be taken to a "Forgot Password" page. If the email address does not exist, the system will generate an error and prompt for a password again.

Common Elements for all Pages

The following elements are displayed on all site pages when a user is logged into File Share.

Firm Name/Firm Logo

The Firm Name or Firm Logo, if present, is displayed in the upper left hand corner.

Your Firm Logo can be uploaded to your File Share by Site Builder's Web Design Department for a small fee. Please contact your CCH Site Builder Customer Sales Representative at (877) 876-2470 for more information.

Firm Contact Information

The Firm Contact's email address will display as a clickable link under the Firm Name/Logo.

When you or a Site Builder Customer Service Representative update your firm contact information, that information is automatically applied to File Share.

As the File Share administrator, you can select the Firm Information button in the top right of your screen and edit your firm profile.

Logout Button

Clicking Logout exits the program and displays the Login page. You will then have the option to log in again.

Help

Clicking Help opens a pop-up window with the online help file for the selected page.

Terms of Service (TOS)

Clicking Terms of Service opens a pop-up window displaying the File Share terms of service.

Privacy Policy

Clicking Privacy Policy opens a pop-up window displaying the File Share privacy policy.

Proprietary Information

Clicking Proprietary Information opens a pop-up window displaying the File Share Copyright Information and Disclaimer.

New User Sign-Up

To register as a new user, click the File Share banner on your Home Page. In the log in screen, click "New User Registration." This opens the New User Sign-up Page where users can register new accounts.

The following are required fields:

First Name

The first name field accepts a maximum of 30 characters.

Last Name

The last name field accepts a maximum of 30 characters.

Email Address

The email address field accepts a maximum of 50 characters. The email address entered is validated and accepts only the standard email format (address@domain.com). The system does not accept anything other than letters, numbers, periods, dashes and underscores as valid characters, no spaces or special characters will be allowed.

Password

Your password is validated to check for a minimum password length of 5 characters and must contain a minimum combination of alpha and numeric characters or a combination of alpha and special characters or numeric and special characters.

Confirm Password

The Verify Password field has the same qualifications as the Password field.

Terms of Service Acceptance

You must check this box to indicate you have read and accepted File Share's Terms of Service.

Submit Button

When the user clicks Submit, all fields will be validated.

If a field fails validation, the appropriate error message(s) will display above the entry boxes and the appropriate field(s) will be highlighted.

If the entries are correct, an email containing the user information will automatically be sent to the Firm Contact email address requesting account activation.

File Share User Interface

Received Files Page



This page lists files that were uploaded by other users and sent to the current user's account. The file listing displays 25 files per page. If more than 25 files exist, page navigation controls are displayed. Fields on this page provide file information, such as File Name, Type, Size, Upload Date, and Uploaded by Email Address.

Download Icon

A user can download a file by selecting the Download Icon (an image of a gray floppy disk) displayed next to the file. Clicking this icon opens the browser Save File function. This functionality will be the same for all file area pages.

Files Sent Page



This page lists files that were uploaded by the current user. This area will not display if the user does not have upload rights or has not uploaded any files. The file listing displays 25 files per page. If more than 25 files exist, page navigation controls are displayed. Fields on this page provide file information, such as File Name, Type, Size, Upload Date, Assigned To Email Address, the number of times a file has been downloaded.

Download Icon

See the previous section on how to download a file.

Delete Button

When you click the delete button, a warning message appears: "Warning: This will permanently remove the file from the system. Are you sure you want to delete?" Clicking Continue deletes the file. Clicking Cancel closes the message and the file will remain in the repository.

File Upload Page



The File Upload page displays disk space information and provides a method for you to enter the email address of the user for which you are uploading the file.

The Total Disk Space Bar displays the total amount of disk space available within your File Share account.

Total Disk Space Used displays the amount of disk space used.

Disk Space allocated to You shows the disk space to which you are entitled.

Disk Space Consumed By You displays the amount of disk space you have consumed.

Assigned to Field

The following options are displayed in the drop-down menu:

All Users

Select this option to send file(s) to all users. This option is only available to Administrators.

New User

Select this option and enter an email address to send files to a currently non-registered user. Only firm administrators can use this option. The new user will be prompted to register a File Share account, and the account must be approved by the account administrator.

Existing User

Select this option to enter the email address of the user for which you intend to upload a file.

Next

Click Next to select files to be uploaded. The amount of allocated and consumed space and space is displayed. If the user does not have space restricted or is a Firm Administrator, the total available space will display. If a user has been restricted but the amount of space available to the firm is less than the amount of space available to the user, then the space available to the firm will display.

When you click the Next button the Upload Files page is displayed.

How to Upload a File

To upload a file to a user:

1. Click **Upload Files**.
2. Select **Existing User** "Assigned To" dropdown.
3. Enter the user's email address.
4. Click **Next**.
5. Click **Add Files**.
6. Browse for and select the files to be uploaded.
7. Click **Start Upload**.

When complete you will see a page similar to this:

Show entries Search:

Download	Delete	File Name	Type	Size	Date Uploaded	Assigned To	Number Of Downloads
		header	jpg	17.73 KB	10/20/2011	All Users	0

Showing 1 to 1 of 1 entries  

Your file has now been uploaded to the user under "Assigned To".

Uploading Files to a User That Does Not Yet Exist

Administrators may enter the email address of an account that does not yet exist by selecting the New User option in the drop down menu. Only Firm Administrators can send files to non-registered members. The system will hold the files until the user activates their account.

The non-registered user will be automatically registered within the File Share system. At this time, the new user will receive an email that will prompt them to set their password. Until this is done, the new user cannot access the file. After the user sets their password, they can log in and access the file. New users cannot upload files until the firm administrator assigns them permission to do so.

Firm Files Page



Firm Files lists files that were uploaded to everyone with access to the firm's site. The file listing displays 25 files per page. If more than 25 files exist, page navigation controls are displayed.

My Profile Page



My Profile displays the same entry boxes as the New User Sign-Up, but is pre-populated with the current user's information. Selecting Update allows you to update user information. Clicking Cancel returns you to the Received Files Page without updating the fields.

Administration Interface

Administration Tools

When logged in as an Administrator, a new menu is displayed with three links: User Administration, File Administration and Firm Information.

User Administration



User Administration provides a list of 25 users. If more than 25 users exist, page navigation controls are displayed. Users can be edited or deleted from this page.

The User Administration list displays user detail such as the user's email address, name, account activation status, administrator account status, and upload authorization status.

Edit

Click this button to make modifications to a selected user.

Account Active

Activating this option will activate the user's account and send the user an account activation email. If this email address previously existed in the system and files are currently associated with the email address, the Firm Administrator will receive a warning that the user will be given access to those files.

Administrator Account

Activating this option will change the account to a Firm Administrator status.

Upload Files

Activating this option will give the user permission to utilize the Upload Files page.

Delete

Click this button to delete the selected user. If there are no existing file assignments, select OK to confirm the deletion of the user account. If the selected user account has been assigned files, an Existing Files Warning Page will be displayed to resolve the assignments.

File Share User Types

File Share has two types of users: Firm Administrators and users. The following actions can be performed by each user type.

Firm Administrators

[NOTE: FIRM ADMINISTRATOR PRIVILEGES SHOULD NEVER BE GIVEN TO CLIENTS. FIRM ADMINISTRATORS HAVE ACCESS TO EVERY FILE FOR EVERY CLIENT.](#)

1. Activate and deactivate user accounts.
2. Assign disk space limits for all users.
3. Set the permission to upload.
4. Assign and revoke Firm Administrator status.
5. Change the Firm Contact email address.

6. Change Firm Address and Phone Numbers.
7. Update current user profile information.
8. Delete user accounts.
9. View all uploaded files.

A firm may have multiple firm administrator level users, but only one firm contact address may be configured.

Regular Users

1. Create a user account.
2. Update current user profile information.
3. View/download files available to the entire firm.
4. View/download files made available to the current user.
5. Upload files (if given upload rights).
6. Delete files uploaded by the current user.

File Administration Page



Firm Administration provides a list of all files that have been uploaded to the firm's File Share Site and allows the Firm Administrator to delete them or assign them to a different user. The file listing displays 25 files per page. If more than 25 files exist, page navigation controls are displayed.

The Sender column displays the email address of the user that uploaded the file.

The Assigned To column displays the email address of the user to whom the file was assigned. If the file was uploaded to all users, this field displays "All Users."

Delete Button

When you click the delete button, a warning message appears: "Warning: This will permanently remove the file from the system. Are you sure you want to delete?" Clicking Continue deletes the file. Clicking Cancel closes the message and the file will remain in the repository.

Change Assignment Button

This button opens a new page that allows an Administrator to change the file assignment.

Firm Information



The Firm Profile page allows a Firm Administrator user to update the Firm's Address, City, State, Zip Code, Phone Number, Fax Number and Contact Email Address. Firm Administrators are not allowed to change the Firm Name, Contact Name or Email Address. The Firm Name can only be updated from the Site Branding page within the Site Builder Wizard. The Administrator information is the initial Firm Administrator created by the system. If that user is deleted, the next Firm Administrator in the User Administration list will display.

Clicking Update saves the changes and the user is returned to the User Administration page. Clicking Cancel returns the user to the User Administration page without saving the changes.

Session Timeout Page

The system automatically logs out the user after 30 minutes of inactivity. After a session expires, the next time the user selects anything within the site, they are taken to the Session Timeout page.