



Download your kit

<https://citrix.sharefile.com/d-sf05284ba3f543d28>

## Welcome to your ShareFile User Adoption Kit

Thank you for choosing Citrix as your content collaboration partner. We put together this customizable kit of promotional materials to help you prepare and onboard users with ShareFile. Your kit includes:

- **3 email communications**  
When it comes to any kind of change, you can never over-communicate. Which is why we drafted three emails to keep your users informed during each stage of the process. We recommend you start sending the emails at least three weeks before your launch.
- **End user guide**  
This guide walks end users through the steps they need to take to get started with ShareFile. We suggest you include this guide in the third email communication and post it on your intranet.
- **3 end user quick-start guides**  
Quick reference guides for using Citrix Files for Windows and Mac, Citrix Files for Outlook, and the mobile app.
- **Admin success guide**  
Learn how you can customize your account to fit your organization's needs, plus tips for a successful rollout.
- **Facility flyer**  
It's easy for emails to get lost in overloaded inboxes, so we designed a flyer for you to print out and post at popular areas around your office, like the break room, collaboration spaces, and even the hallway or elevator, to remind people of the services available to them.



## How to make it your own

- Replace the Citrix logo with your organization's logo
- Add or remove screenshots
- Modify text as needed

## How to edit a PDF in Adobe Acrobat Pro or Acrobat Pro DC

1. Open a file in Acrobat Pro or Acrobat Pro DC.
2. Click the arrow to open the right pane, and click **Edit PDF**.
3. Click on the text or image you want to edit. Acrobat shows you the tools you'll need.
4. Add or edit text on the page. Lines and paragraphs reflow automatically, or you can click and drag to resize elements.
5. Add, replace, move, or resize images on the page using selections from the Objects menu in the right pane.
6. For further edits to your PDF, click on the **Link, Header & Footer, Watermark, or Background** options in the top menu.

If you do not have Acrobat Pro or Acrobat Pro DC, you can modify the included Microsoft Word files to create custom versions for your business needs.

Thank you again for being a valued Citrix customer. We're sure your users will love having greater flexibility and productivity with access to their files from any device.

Download your kit

<https://citrite.sharefile.com/d-s74c666f9c0f4fe1b>

## [EMAIL 1]

### **Subject line**

A new file-sharing experience is coming

### **Preview**

Soon you'll be able to easily access your files from all your devices, wherever you are

### **Header/subheader**

Get ready for a new file-sharing experience

Soon you'll be able to easily access your files from all your devices, wherever you are

### **Body**

We understand that when you're working, you're not always in the office on your desktop. But you still need access to your files. That's why we're rolling out a new and improved file-sharing system, Citrix ShareFile—so you can work the way you want, wherever you want, without having to worry about security.

You'll be able to:

- Access the files you need from anywhere
- Securely send, receive, and get approval on large files
- Seamlessly collaborate with teams and clients across locations
- Use any device you choose

We hope you're as excited as we are about the greater flexibility and productivity our new system will deliver!

[Your signature here]

## [EMAIL 2]

### **Subject line**

Collaborate from anywhere—coming soon with ShareFile

### **Preview**

Our new file sharing experience is almost here

### **Header/subheader**

Securely access your files from anywhere

Our new file-sharing experience is almost here

### **Body**

Your new and improved file-sharing system is almost here! In just **[insert number of weeks/days here]**, you'll be able to access all the files you need to get your job done from anywhere and on any device.

Here are a few tools that'll make file sharing fast and simple:

- **ShareFile Email Plugin:** Easily encrypt email attachments directly within your email client.

- **Citrix Files for Windows and Citrix Files for Mac:** Connect to ShareFile with a mapped drive.
- **Mobile Apps:** Access ShareFile from your phone or tablet to view, edit, and share files on the go.

Stay tuned. When we launch our new system, you'll receive more information and step-by-step instructions for getting started.

[Your signature here]

[EMAIL 3]

### Subject line

Our new file sharing experience is here—welcome to ShareFile!

### Preview

Get started today for anywhere access to your files

### Header/subheader

Your better file-sharing experience is here  
It's easy to get started with ShareFile today

### Body

We're excited to let you know that you can now begin using ShareFile, our new file-sharing system! Go to [\[add your subdomain here\]](#), and sign in to your account with the credentials supplied by IT.

Now you can:

- Access the files you need from anywhere
- Securely send, receive, and get approval on large files
- Seamlessly collaborate with teams and clients across locations
- Securely send files from any device, regardless of size limits

Use these tools to make file sharing fast and simple:

1. **ShareFile Email Plugins:** Easily encrypt email attachments directly within your email client.
2. **Citrix Files for Windows and Citrix Files for Mac:** Connect to ShareFile with a mapped drive.
3. **Mobile Apps:** Access ShareFile from your phone or tablet to view, edit, and share files on the go. Download the app from Google Play, the App Store, or Microsoft Store.

### Help and resources

We put together some resources to help you get started. [\[add links to resources or attach\]](#)

For questions about your ShareFile account, please contact us at:

[IT phone number]

[IT email address]

We hope you're as excited as we are about the greater flexibility and productivity our new system will deliver!

[Your signature here]

## **NEW EMPLOYEE EMAIL**

### **Subject line**

Welcome to ShareFile!

### **Preview**

Access your files from anywhere with simple, secure file sharing

### **Header/subheader**

Securely access your files from anywhere

Get started with ShareFile today

### **Body**

As an employee at [Company Name], you now have access to our secure file-sharing solution! With ShareFile, you can:

- Access the files you need from anywhere
- Securely send, receive, and get approval on large files
- Seamlessly collaborate with teams and clients across locations
- Securely send files from any device, regardless of size limits

Here are a few tools that'll make file sharing fast and simple:

1. **ShareFile Email Plugins:** Easily encrypt email attachments directly within your email client.
2. **Citrix Files for Windows and Citrix Files for Mac:** Connect to ShareFile with a mapped drive.
3. **Mobile Apps:** Access ShareFile from your phone or tablet to view, edit, and share files on the go. Download the app from Google Play, the App Store, or Microsoft Store.

### **Help and resources**

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For questions about your ShareFile account, please contact us at:

[IT phone number]

[IT email address]

[Your signature here]

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# Getting Started with ShareFile

Welcome to the simple, secure way to  
share files on any device, anywhere.

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## What's Inside?

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## Welcome to ShareFile

ShareFile is a simple, secure way to collaborate on your files with colleagues and customers. You can easily store, share, sync, and access your files from any device, no matter where you are.

This guide shows you how to use ShareFile to become more productive than ever. See how easy it is to get started.

## How do I sign into ShareFile?

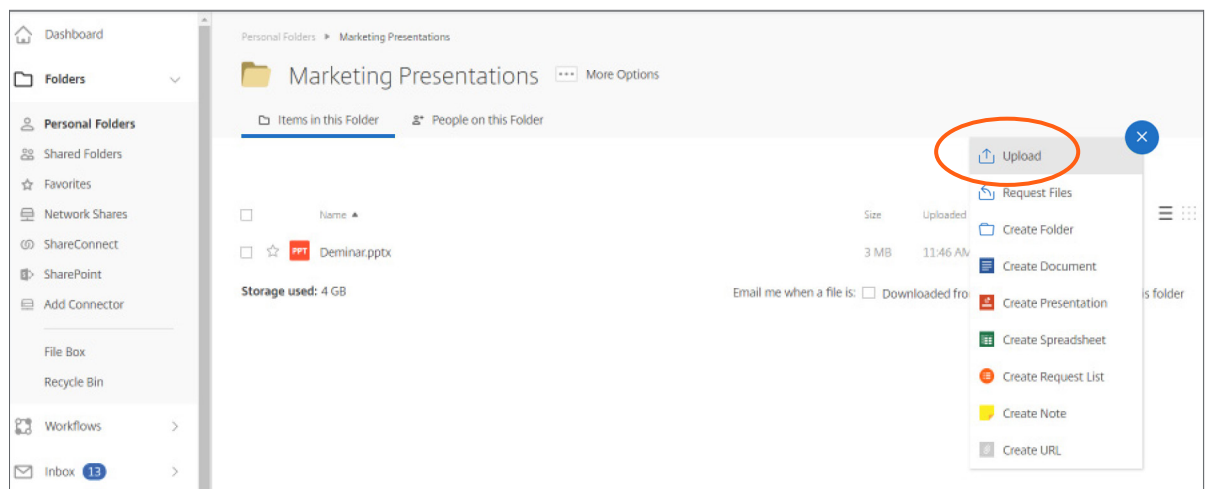
To sign in, go to [subdomain.sharefile.com], and enter your user name and password.

If your organization has configured single sign-on, you'll be able to sign in with your company credentials from this same screen.

## How do I upload a file?

It's easy to upload files to ShareFile, whether you're using a web browser, a ShareFile tool, or your mobile device.

1. **Web browser:** Navigate to the folder where you'd like to upload a file. Click the + button, select **Upload**, and either drag and drop a file right into ShareFile or browse your computer.

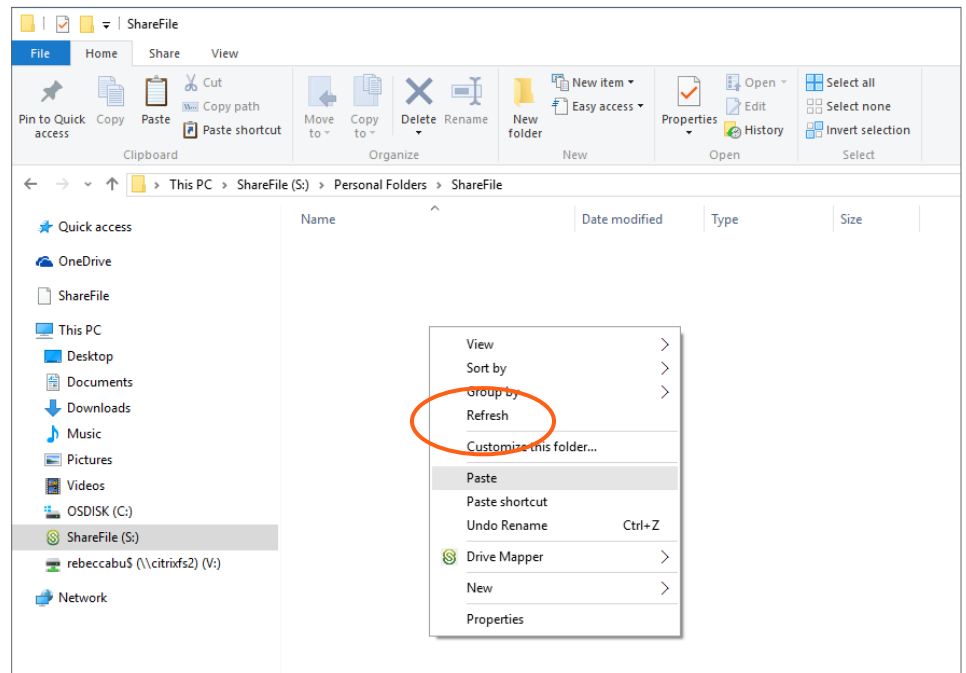


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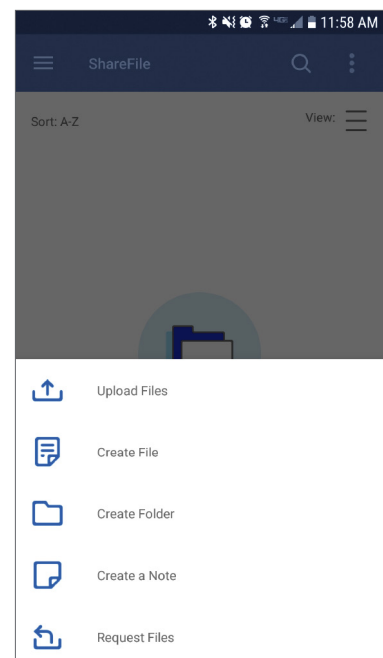


## 2. Drive Mapper is now Citrix Files for Windows and Citrix Files for Mac:

Go to <https://www.citrix.com/downloads/sharefile/> to download this tool. Once downloaded, simply map to a drive and then save your file and it is automatically synced from the cloud to your desktop.



3. **Mobile app:** If you're accessing ShareFile through your mobile app, navigate to the folder where you'd like to upload the file, click the + button, select **Upload**, and browse to find the file you want to upload.

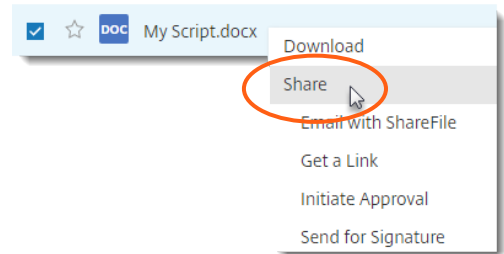


## How do I share a file?

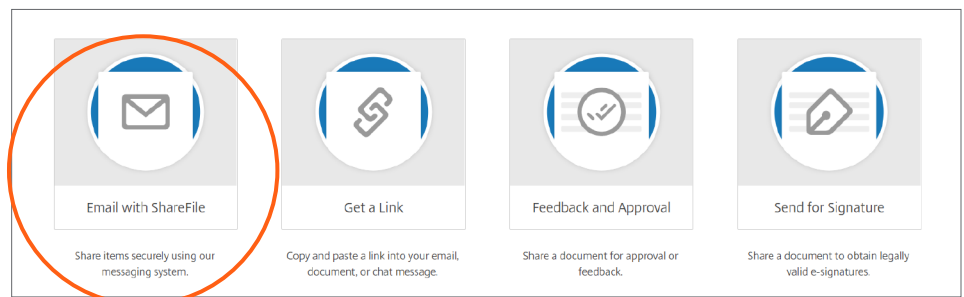
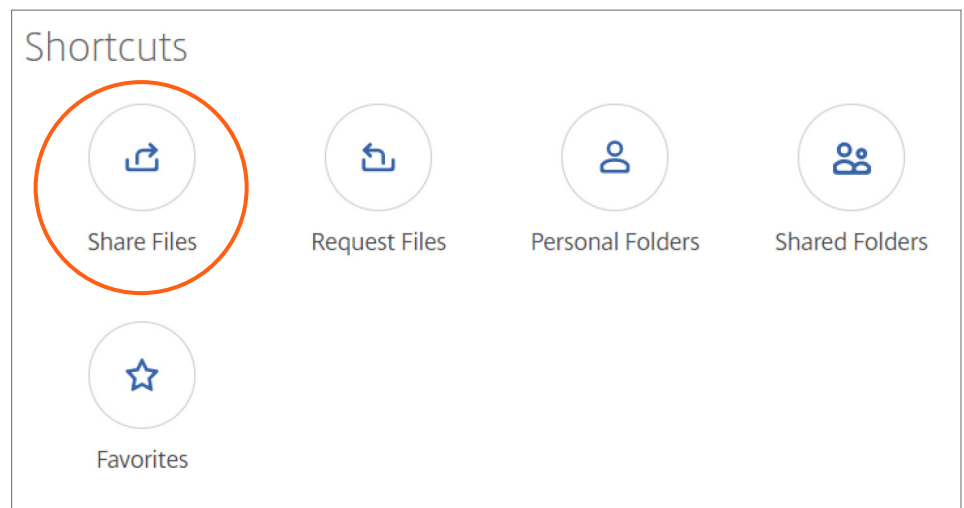
There are several ways to share a file.

1. **Email with ShareFile:** This feature allows you to send your file(s) via ShareFile's email system. With this method, the recipient receives an email message containing a secure link to download the file(s). You can send a file stored on your account, or send a file stored on your computer.

a. To email a file stored on your account, right-click on the file in ShareFile, choose the **Share** option, then select **Email with ShareFile**.

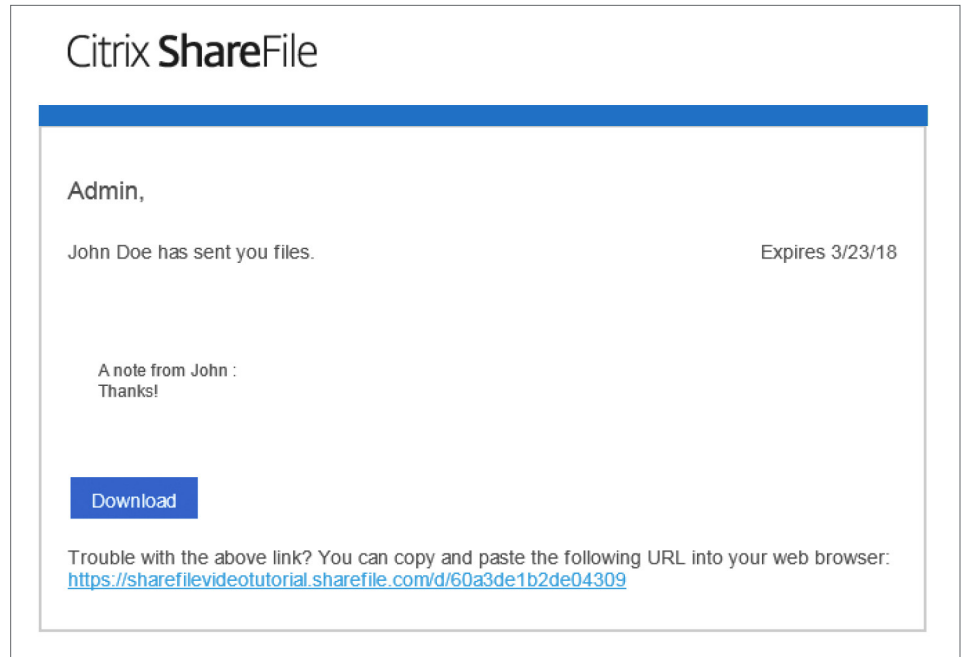


b. To email a file stored on your computer, go to your ShareFile dashboard shortcuts, choose **Share Files**, then select **Email with ShareFile**.



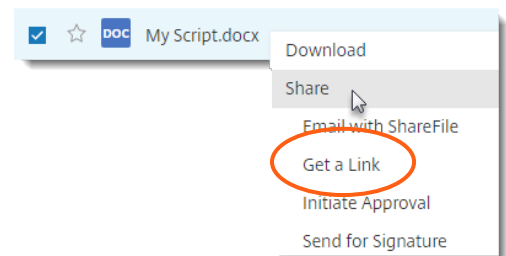
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What your recipient sees:



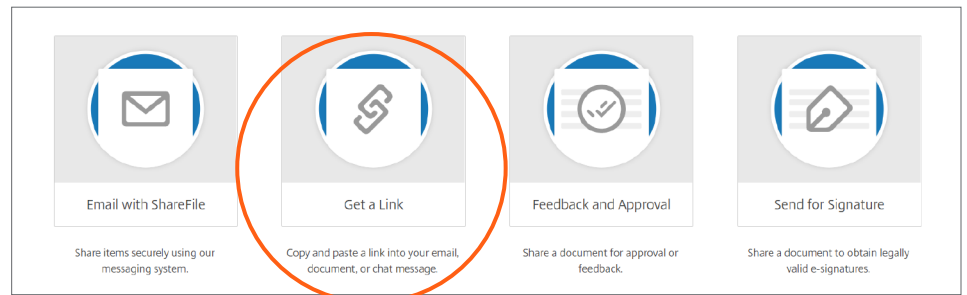
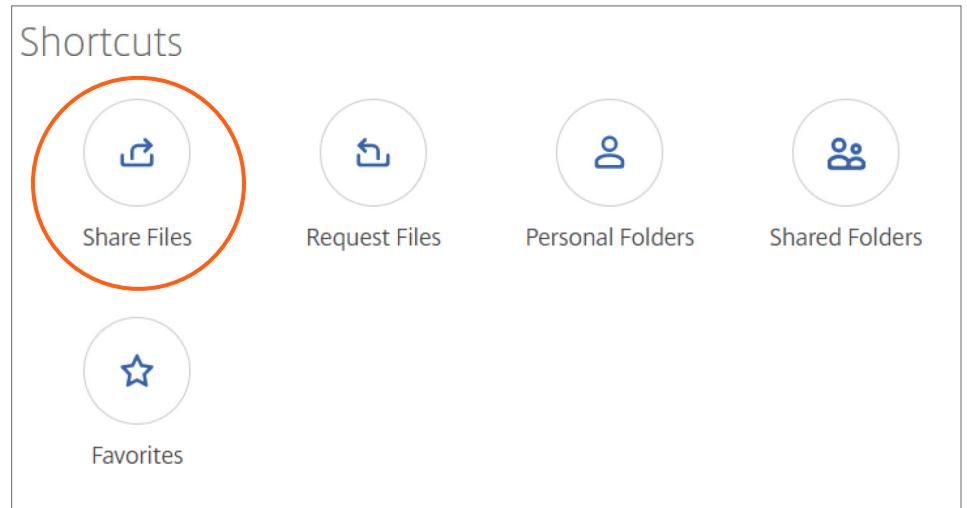
2. **Get a Link:** This feature creates a link you can copy and paste into any email or chat message to allow a recipient to safely access your file. You can share a file stored on your account, or share a file stored on your computer.

a. To get a link for a file stored on your account, right-click on the document, and select **Share** and then **Get a Link**. Copy and paste the link and share.



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b. To get a link for a file stored on your computer, go to your ShareFile dashboard shortcuts, choose **Share Files**, and then select **Get a Link**. Copy and paste the link, and share.



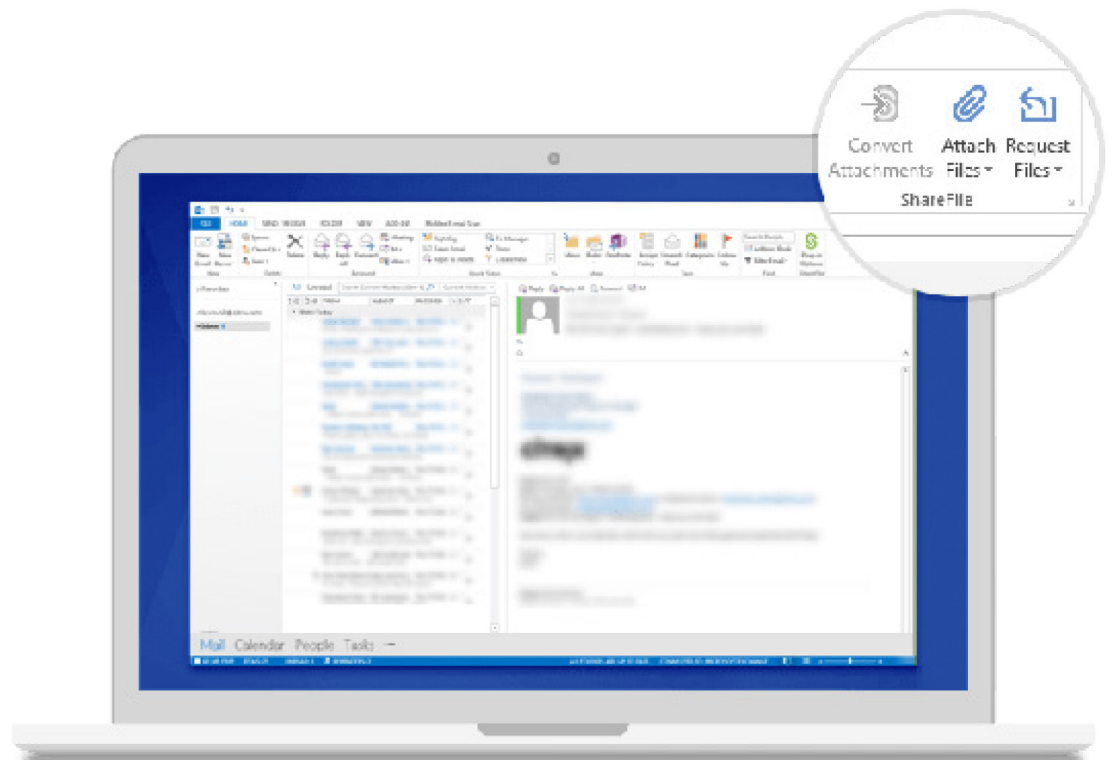
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## How do I send a file through Microsoft Outlook?

Once you download Citrix Files for Outlook (<https://www.citrix.com/downloads/sharefile/>), simply open a new email message, you'll see some ShareFile options in the message ribbon. You have two options for adding a file to your message:

1. **Convert Attachments** will turn any files you've already attached to the email into secure ShareFile documents.
2. **Attach Files** allows you to use ShareFile to attach documents that are either saved in your ShareFile account or stored locally on your computer.



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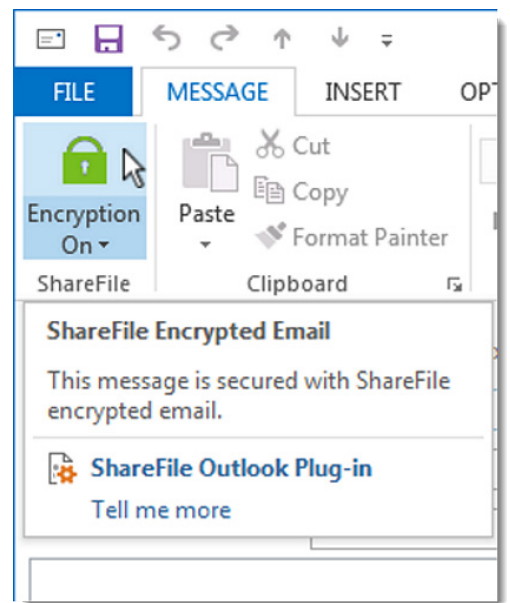
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## How do I send a file through Gmail or other accounts?

The easiest way to send a file through any email program is to use the “Get a Link” function within ShareFile from your browser. Copy and paste the ShareFile link into your Gmail message for a quick, safe way to share your file.

## How do I send an encrypted email?

When you open a new email message in Outlook, you’ll see a green ShareFile padlock icon on the left of the message ribbon. Click the drop-down arrow and then **Use Custom Settings**. After confirming a few options, your entire message text will be encrypted—both on its way to your recipient and once it’s in their inbox.



## What file types can I upload?

ShareFile supports all file types.

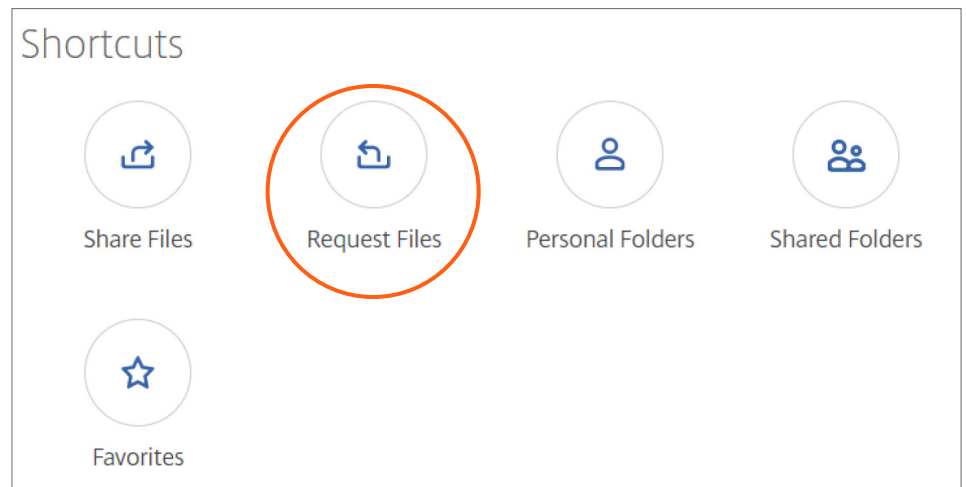


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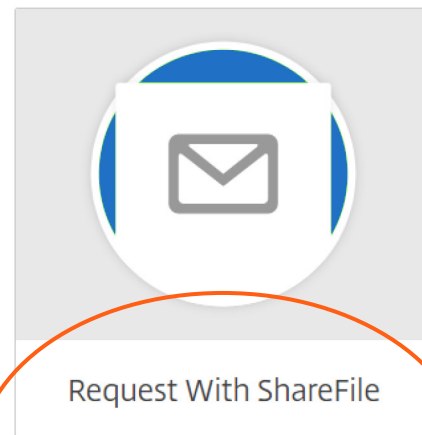
## How do I request a file from a coworker or client?

There are two ways to easily request a file from someone.

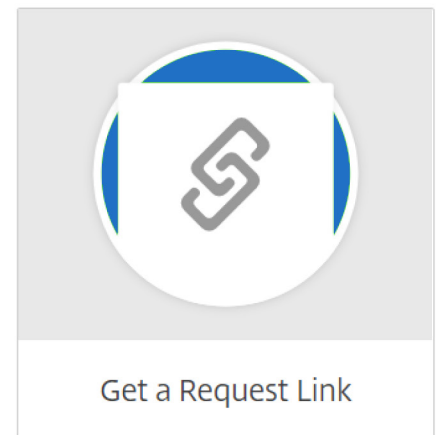
On your account dashboard, click **Request Files**.



1. **Request with ShareFile:** Choose this option to send a request through ShareFile. Fill out the fields for recipients and message, check the location where you'd like files uploaded, and click **Send**.



Request items securely by using the ShareFile messaging system.

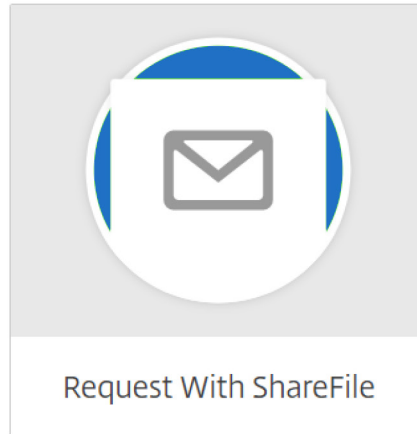


Copy a link and share it in an email, document, or chat message.

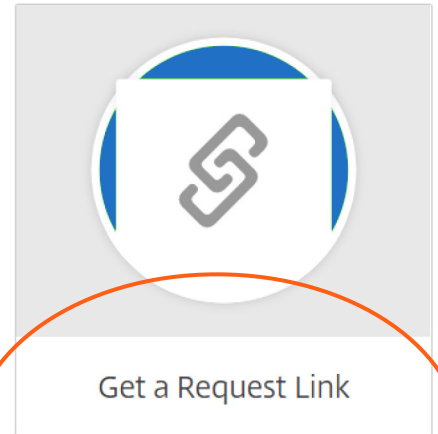


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2. **Get a link:** Choose this option to request a link to embed in an email, chat, or site. Verify the location where you'd like files uploaded, and click **Get a Link**.



Request items securely by using the ShareFile messaging system.



Copy a link and share it in an email, document, or chat message.

- a. You can place this link right in your email signature from Outlook. Open a new email, and click the **Insert** tab. You'll see an icon for Signature. Open the drop-down arrow, and click **Signatures...** In the Edit Signature box, you can place the link wherever you'd like in your email signature. Save it, and it's ready to send.





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## Still need help?

Here are some additional resources:

- Access hundreds of support articles in the [ShareFile Knowledge Center](#)
- Connect with other customers in the [ShareFile Community](#) and see commonly asked questions



### Locations

Corporate Headquarters | 851 Cypress Creek Road Fort Lauderdale, FL 33309, United States  
Silicon Valley | 4988 Great America Parkway Santa Clara, CA 95054, United States

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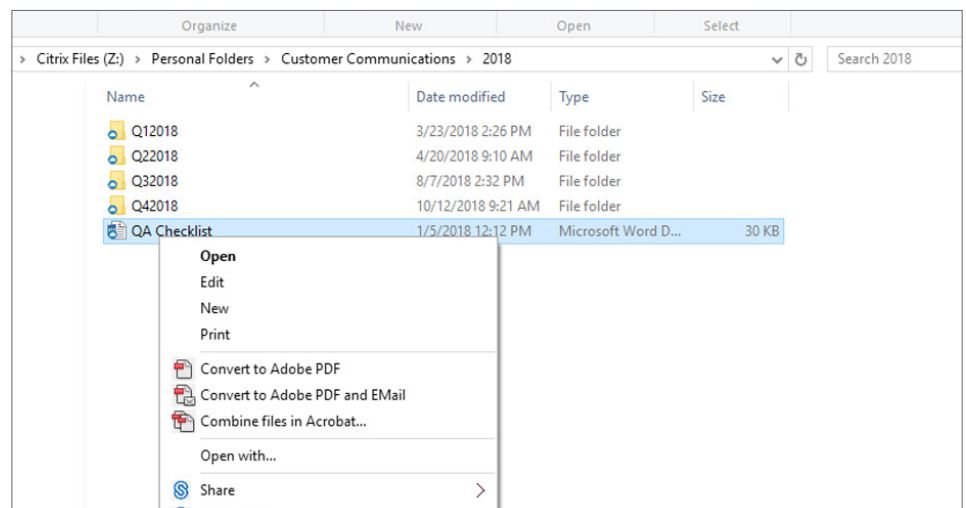


# Citrix Files for Windows and Citrix Files for Mac

Delivers secure access to all your files

## 4 reasons to start using Citrix Files for Windows and Citrix Files for Mac today

1. **Quick access to all your files:** Connect a ShareFile account as a mapped drive without performing a full sync of content.
2. **Flexibility:** A single point of access to multiple data repositories.
3. **Tools at your fingertips:** Simply right-click to manage folder permissions, add items to favorites, initiate workflows, and view item details, like notes and file versions. Also see recent activity in the menu bar.
4. **More control:** Set notifications when someone uploads, downloads, renames, or checks out files.

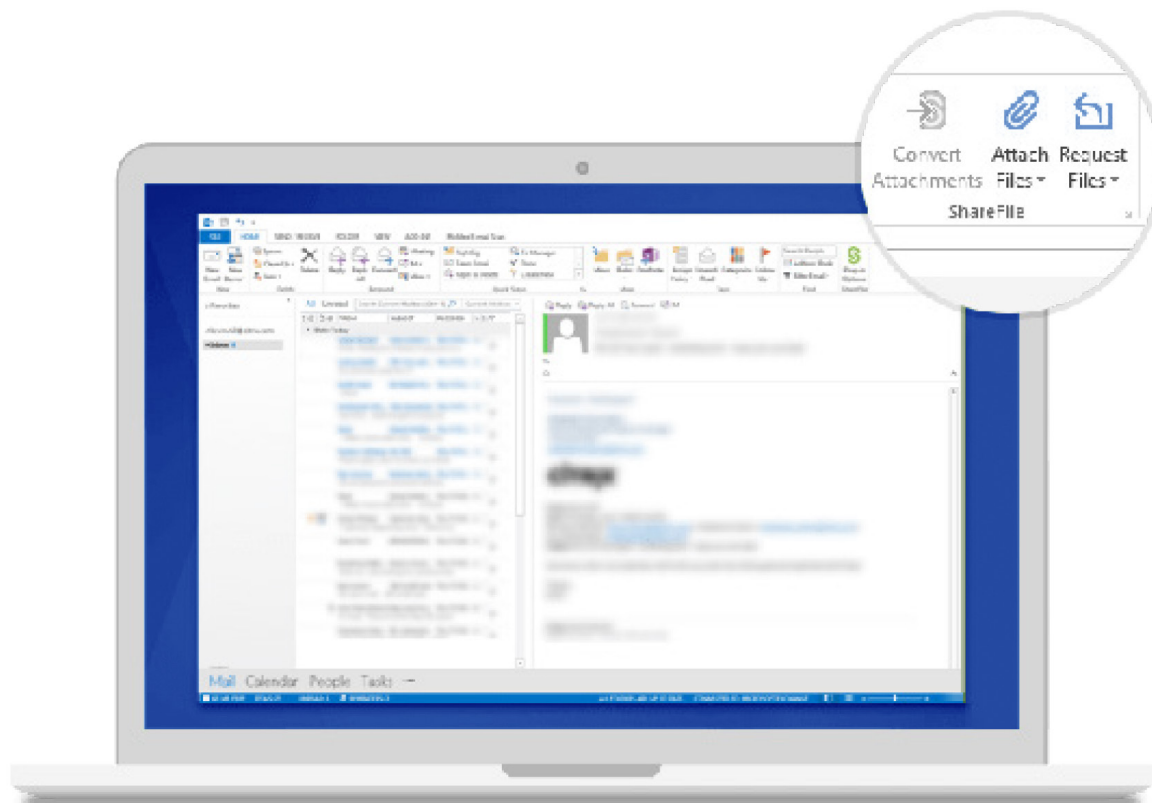


## Citrix Files for Outlook

Send sensitive or large files as secure attachments – right from Microsoft Outlook

Why you should start using the Citrix Files for Outlook today:

1. Share large, encrypted files directly from Outlook
2. Request files securely with one click
3. Encrypt email message for added security
4. Share files up to 100 GB on any device



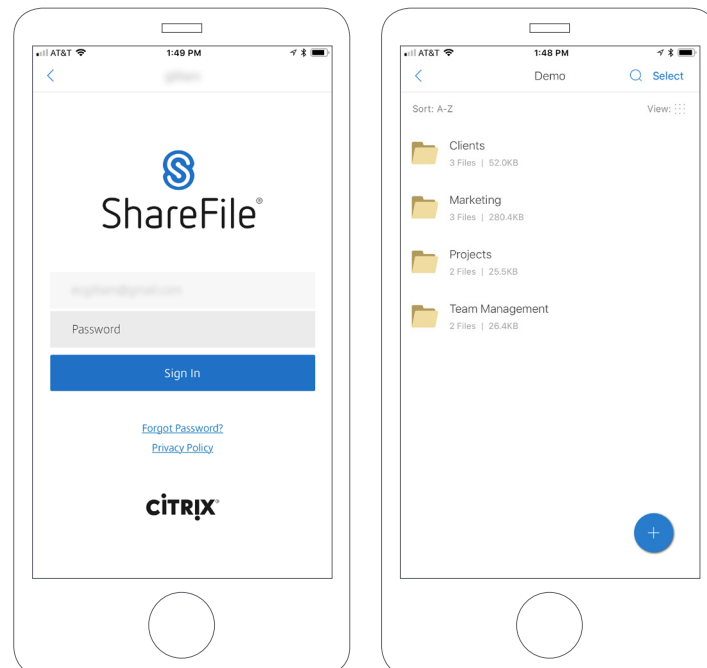


## The Citrix Files Mobile App

Delivers secure access to your files on iOS, Android, and Windows devices

### Why you should start using convenient mobile apps today

1. It's the easiest way to keep files instantly up to date on all of your devices
2. You get simple, secure access to your files on the go
3. You can edit Microsoft Office files and annotate PDFs anytime, anywhere



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# ShareFile Admin Success Guide

Welcome to the simple, secure way to  
share files on any device, anywhere.

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## What's Inside?

Citrix ShareFile offers best-in-class flexibility, allowing you to customize your account to fit your organization's needs. As you get ready to roll out ShareFile, we recommend you take these 5 steps to ensure a smooth experience for both you as the admin and for your users who will be working in the tool every day.

|                                            |   |
|--------------------------------------------|---|
| 1. Configure your account settings.....    | 3 |
| 2. Select your storage preferences.....    | 3 |
| 3. Configure single sign-on.....           | 3 |
| 4. Deploy ShareFile apps and features..... | 4 |
| 5. Roll out ShareFile .....                | 4 |

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## Step 1: Configure your account settings

We recommend you first update your account settings. Here are some key settings:

- [Subdomain](#)
- [Account colors and logo](#)
- [Security settings](#)
- [File retention policy](#)
- [Custom SMTP](#) (Send emails through your mail server instead of ShareFile's servers)

Check out more information on all [Advanced Preferences](#).

## Step 2: Select your storage preferences

With ShareFile, you get the flexibility to determine where you store your data, whether in the cloud, on premises, or a hybrid of both. Here's what you need to know to set up an on-premises storage location (StorageZone):

- [Prerequisites](#)
- [Installation guides](#)
- [Software downloads](#)
- [Connections to existing data locations](#) (network drives, SharePoint, etc.)
- [HIPAA-compliant Healthcare Cloud](#)

Once you set up your storage location(s), start [creating your folder structure](#) and [migrating your data](#).

## Step 3: Configure single sign-on

Allow your users to sign in to ShareFile with their company credentials by configuring single sign-on (SSO).

- [Configure SSO](#) (Leveraging your existing SAML 2.0 or 3.0 identity provider (IdP))
- Once you configure SSO, set up the User Management Tool to [import your users from your Active Directory security group\(s\) or organizational unit\(s\)](#).

**TIP:** If you're not ready to deploy to your end users, simply clear the "Notify Employees with Email" option when you create your provisioning rule.

Citrix offers a service to help guide you through SSO setup. Get all the details in the [ShareFile SSO Guided Setup](#) data sheet. Contact your sales representative for pricing and more information.



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## Step 4: Deploy ShareFile apps and features

Determine the tools and apps you would like to roll out to your users.

- [Apps and features overview](#)
- [The ShareFile Plug-in for Microsoft Outlook](#)
- [Drive Mapper](#)
- [Windows Sync](#)
- [Mac Sync](#)
- [Apps that support SSO](#)

If you push out applications on behalf of your end users, [find your administrative downloads here](#).

## Step 5: Roll out ShareFile

When you're ready to roll out ShareFile to your end users:

- **Create and invite users:** [Create accounts](#) for your end users, and automatically send them a welcome email with an account activation link.
- **Communicate:** We've created a [ShareFile User Adoption Kit](#) to help you prepare and onboard users. Please edit these documents to best fit your organization's needs. Your kit includes:
  - **Editable email templates:** When it comes to any kind of change, you can never over-communicate. Which is why we drafted three emails to keep your users informed during each stage of the process. We recommend you start sending the emails at least three weeks before the launch of ShareFile
  - **Facility flyers:** It's easy for emails to get lost in overloaded inboxes, so we designed some flyers for you to print out and post at popular areas around your office, like the break room, collaboration spaces, and even the hallway or elevator, to remind people of the services available to them.
  - **Getting Starting With ShareFile:** Adding a new technology tool can sometimes feel overwhelming, so we've created short guide to get users up and running in no time.
  - **Tool quick-start guides:** Quick-start guides on four of ShareFile's most popular tools, Drive Mapper, Sync, Outlook Plug-in, and mobile apps.
- **Get custom training:** Citrix offers end-user and admin training led by ShareFile experts. Contact your sales representative for pricing and more information.

**TIP:** If you configured single sign-on for ShareFile, you can send out your own email invitation blast by simply including your ShareFile URL.





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## Additional Resources

- [Support Knowledge Center](#)
- [ShareFile System Status](#) (Subscribe to updates)
- Subscribe to [Releases Notes](#)
- [Citrix Support](#)
- [Enterprise Admin Success Guide](#)

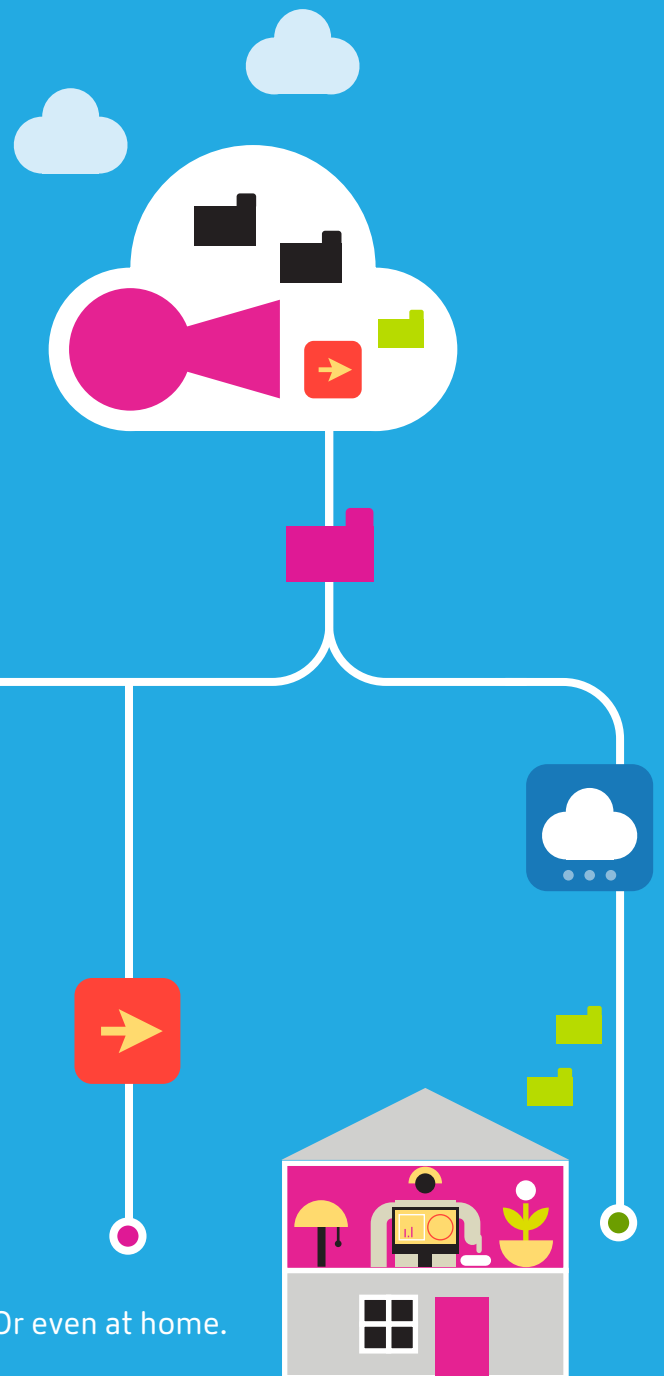


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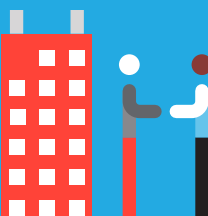
You can access and share all your files, from any device.



Whether you're in the office...



On the road...



Visiting a client...



Or even at home.



It's easy to get started. Simply sign in to your ShareFile account with your company credentials, and start sharing files today.

**Have questions or need help?**  
Contact the IT team to learn more.