Affinity INSIGHT

CITRIX SHAREFILE
for LEGAL PROFESSIONALS

CITRIX SHAREFILE

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

Invest. Inspire. Empower.

MEET OUR SHAREFILE EXPERT

Meet our ShareFile expert authored this manual.

DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.

CITRIX SHAREFILE FOR LEGAL PROFESSIONALS
TABLE OF CONTENTS

1   INTRODUCTION

2   SETTINGS

3   ENCRYPTING EMAIL

4   SENDING FILES

5   RECEIVING FILES

6   SHARING FILES

7   RECIPIENT ACCOUNT CREATION

3 ENCRYPTING EMAIL

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

If you need to send sensitive information, you can send an encrypted email using either Citrix Files for Outlook or the web interface.

CITRIX FILES FOR OUTLOOK

Draft your message as you usually would. To encrypt the email, click on the Encryption button.
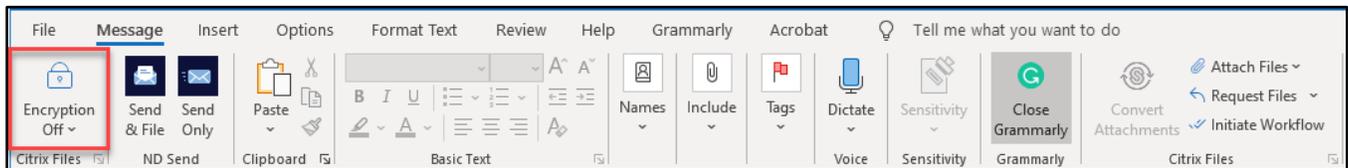
FIGURE 3.1

To use custom settings for this email, click on the arrow below the **Encryption button** and click on **Use Custom Settings**.
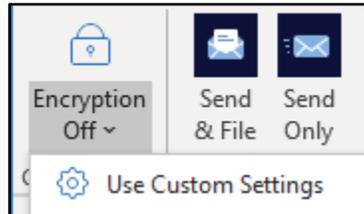
FIGURE 3.2

Change whether to receive notifications, security requirements, expirations, and language. These settings are the same as described in Chapter 2 - here, you can change them on an email-by-email basis, rather than the default settings.

WEB INTERFACE

To send an encrypted email through the web interface:

1. Click on your **Inbox**, then **Received**.

FIGURE 3.3

2. Click on the **Compose button**.

3. Draft the email.

4. Click on **Edit Message Options**.

5. Ensure that **Encrypt Email** is toggled on.

RECIPIENT EXPERIENCE

Opening Encrypted Email

The recipient will receive an email with your subject and a link to view the encrypted message. If you required sign-in (you should), please see Chapter 7 for information on the recipient account creation process.
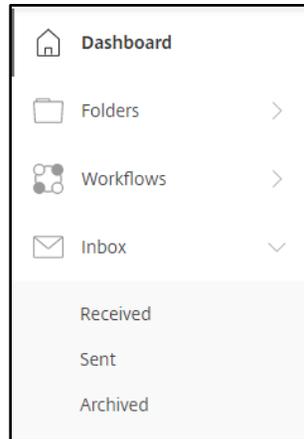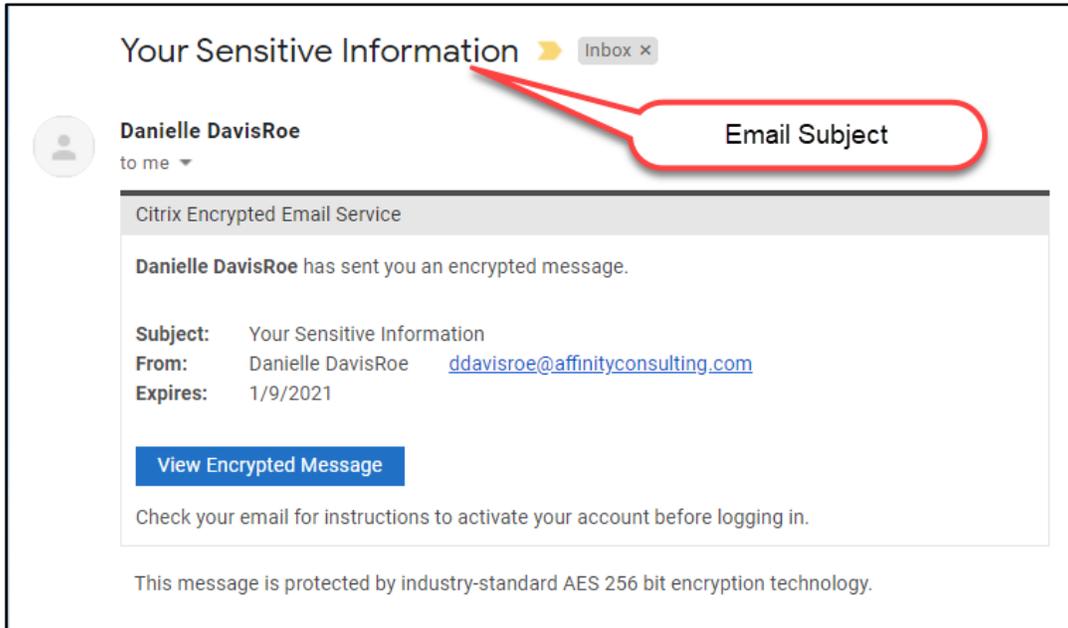

FIGURE 3.4

Upon clicking the link (and signing in), they will be taken an online version of the email. Any formatting and images will be displayed approximately as they appeared when you drafted the email.
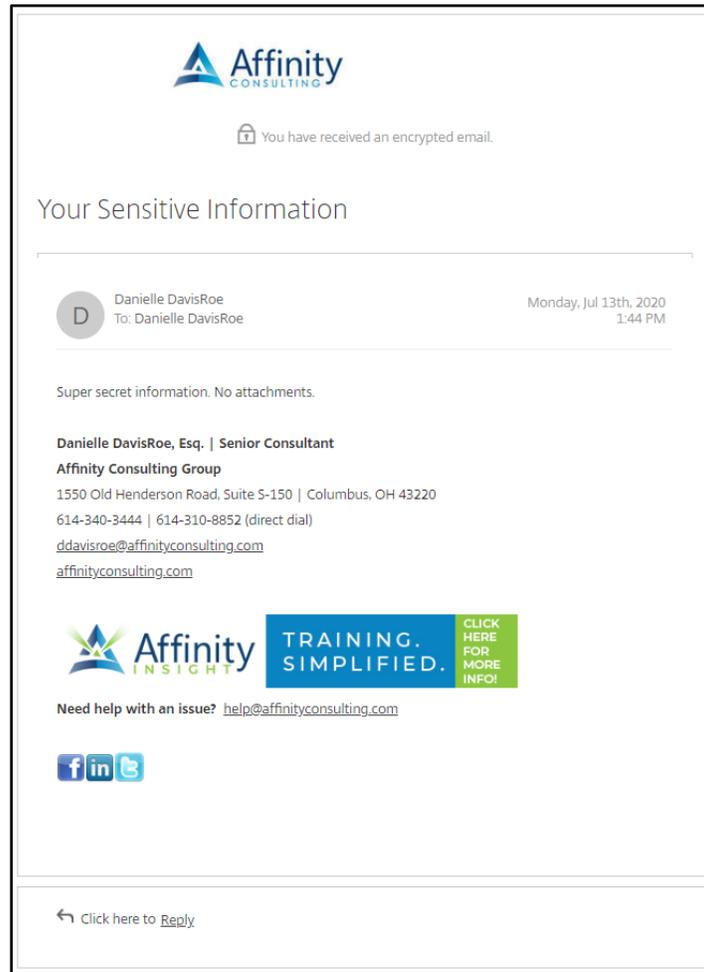
FIGURE 3.5

Replying to Encrypted Email

Recipients can reply to the encrypted message, or they can reply to the email containing the link to the encrypted message. They can add attachments to either email. When replying to the encrypted message, they will receive a notification that the encrypted message was sent successfully. The email will not appear in their sent folder but can be accessed by logging into their ShareFile account (see below).
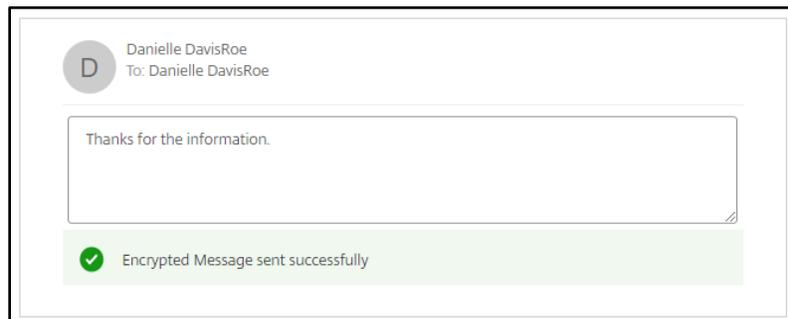

FIGURE 3.6

If the recipient replies from the encrypted message, the response will be encrypted. You will be able to read the message in your inbox and will need to click on the Download Attachments link to download any attachments. It will not contain the email chain. If you reply to this email, your email will automatically be encrypted.
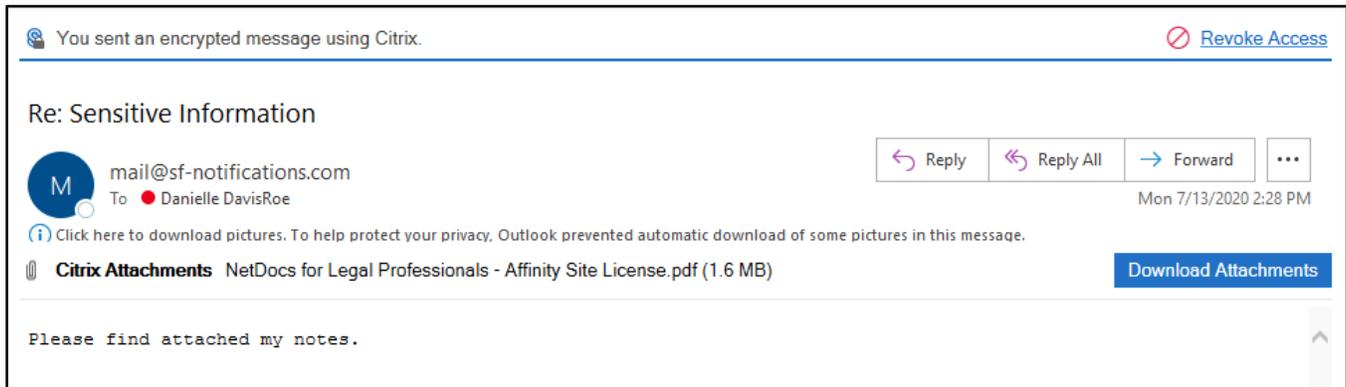

FIGURE 3.7

If the recipient replies to the email with the link to open the encrypted message, the response will not be encrypted unless the recipient encrypts it using their own software. You can encrypt your response, but it will not automatically be encrypted.

ACCESSING ENCRYPTED EMAIL CHAINS

You or your recipients may need to access an encrypted email chain later. To do so, log into the web interface. Click on **Inbox**, then **Received** or **Sent**. The email chains are available there and can be moved to an **Archived folder** if desired.
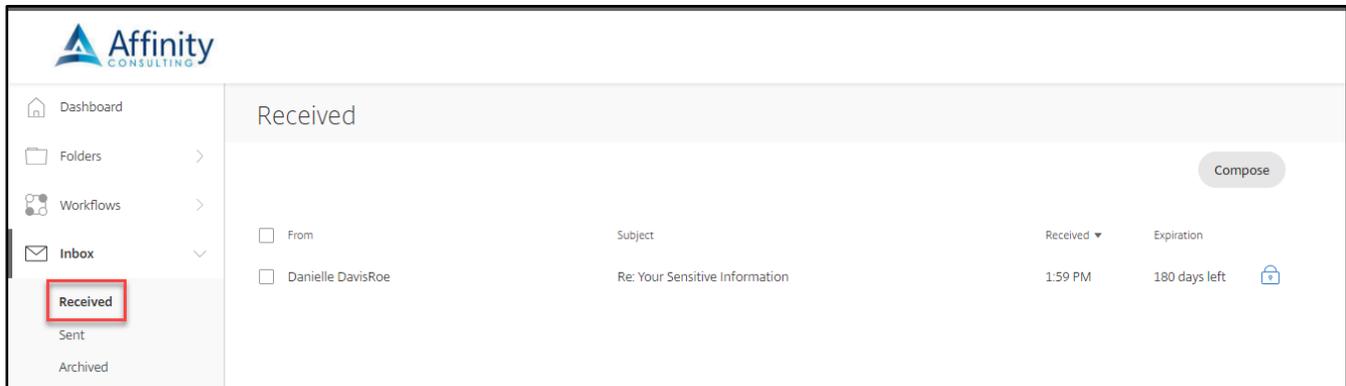

FIGURE 3.8

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TRAINING

Affinity INSIGHT

- On-demand training videos
- Software manuals
- Training webinars
- Custom training plans
- On-boarding plans
- Quarterly training reviews

Are you getting the most out of your technology investment? Turn your team into software experts and experience unprecedented gains in productivity and efficiency.

At Affinity, we believe that training should be woven into the fabric of a firm's culture—not a one-time event. Our team understands that implementing the right technology is only the first step toward an optimized practice. Realizing your firm's full potential requires an ongoing investment in training.

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