



HIGHTAIL FOR BUSINESS

QUICK START GUIDE FOR ADMINISTRATORS

Hightail for Business: Admin Guide

Introduction

Welcome to Hightail! This Quick-Start Guide will lead you through the steps to set up your Business Administrator Account. Beyond this Guide there's a host of tips and tools waiting for you at hightail.com/support.

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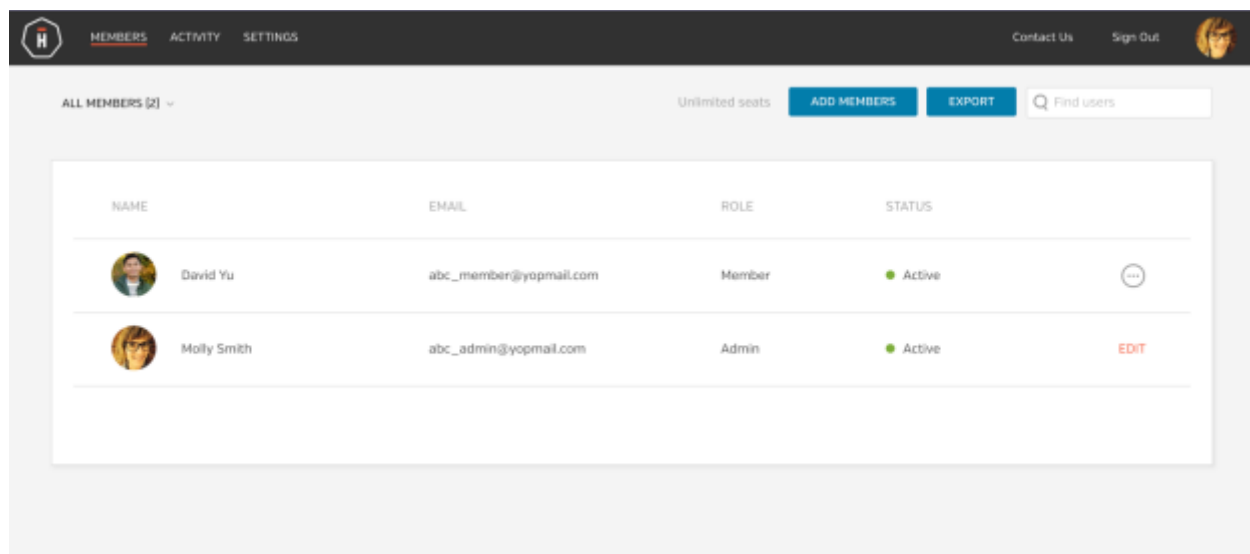
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Managing Users

Through your Hightail Administrator account you can easily manage your organizations' Hightail users.

To get started, select your avatar to access your profile and your account information. Click on the button labelled **Admin Console**. The Admin Console is the tool to add members, manage members, view the status of each of your members and confirm the total number of remaining seats available.



The screenshot displays the Hightail Admin Console interface. At the top, there is a navigation bar with 'MEMBERS', 'ACTIVITY', and 'SETTINGS' tabs. On the right, there are links for 'Contact Us' and 'Sign Out', along with a user profile icon. Below the navigation bar, the main content area shows 'ALL MEMBERS (2)' and 'Unlimited seats'. There are two buttons: 'ADD MEMBERS' and 'EXPORT'. A search bar labeled 'Find users' is also present. The main content is a table with the following data:

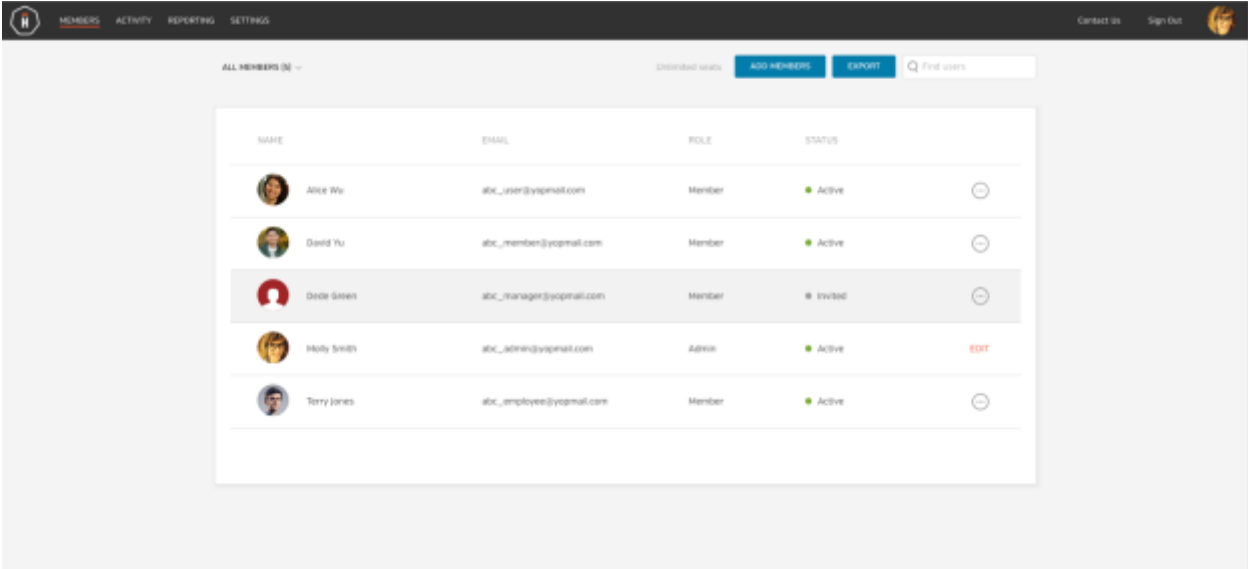
NAME	EMAIL	ROLE	STATUS	
 David Yu	abc_member@yopmail.com	Member	● Active	⋮
 Molly Smith	abc_admin@yopmail.com	Admin	● Active	EDIT

From the Admin Console you can also export a complete .csv file of all your members and search for members in the **Find users** field.

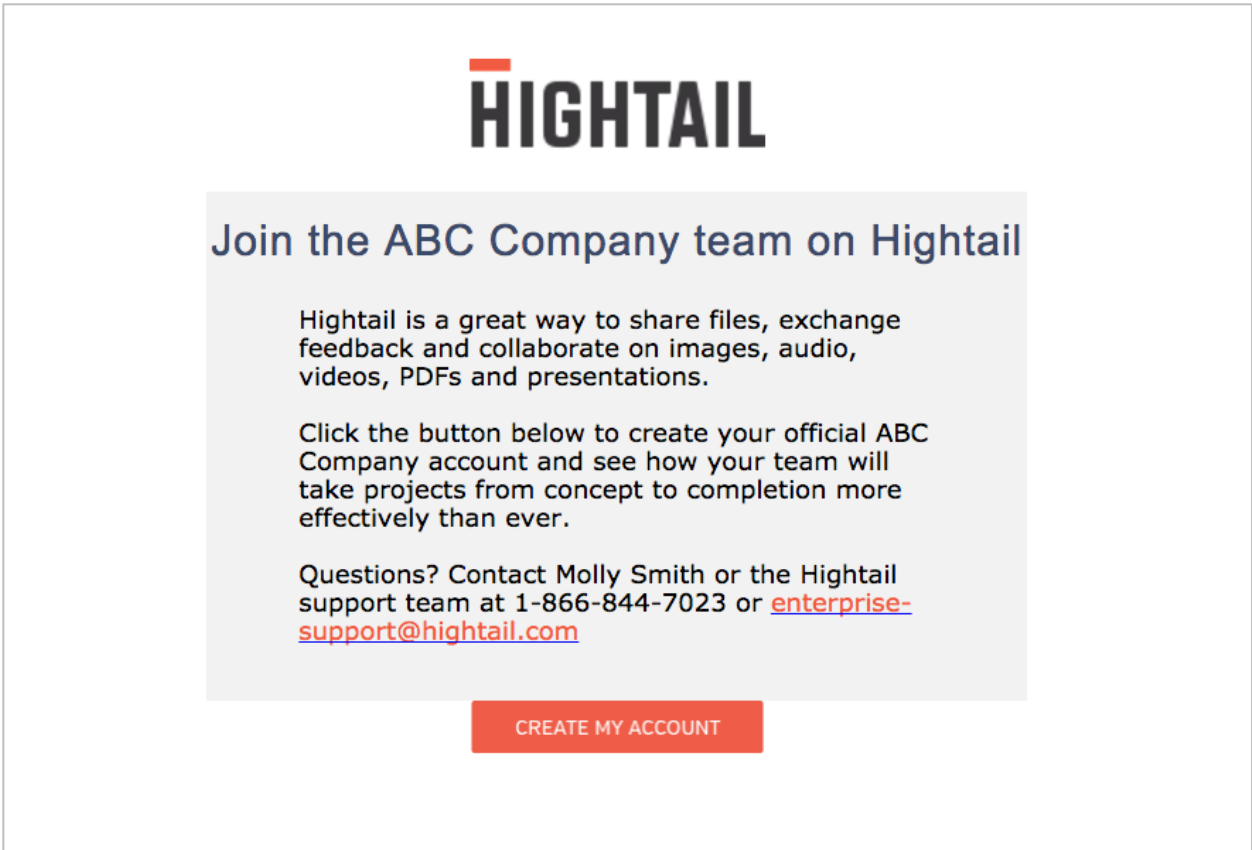
To add members to your organization, click on the **Add Members** button. You can manually invite each user or you can import a .csv file to invite a group of users. The format for the .csv file is 2 columns (Full Name, Email) with no header.

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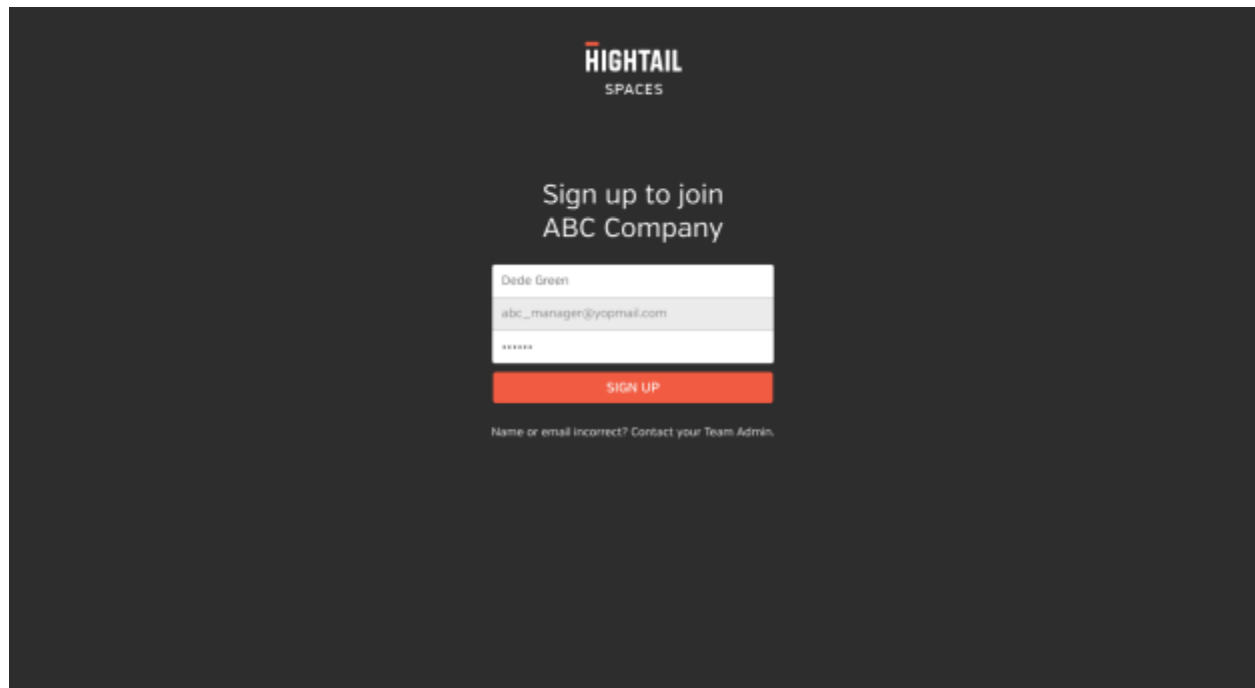
Initially the new member's status will be listed as invited.



The member will receive an email invitation to use Hightail.



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Once the member accepts the invitation s/he will enter their name, email address and a password to complete sign-up for their account. The member will now appear in the Admin Console as active.

Using the menu button you can either assign a member as a Member or an Admin. Please note that all Admins have the same rights and permissions as the Primary Admin.

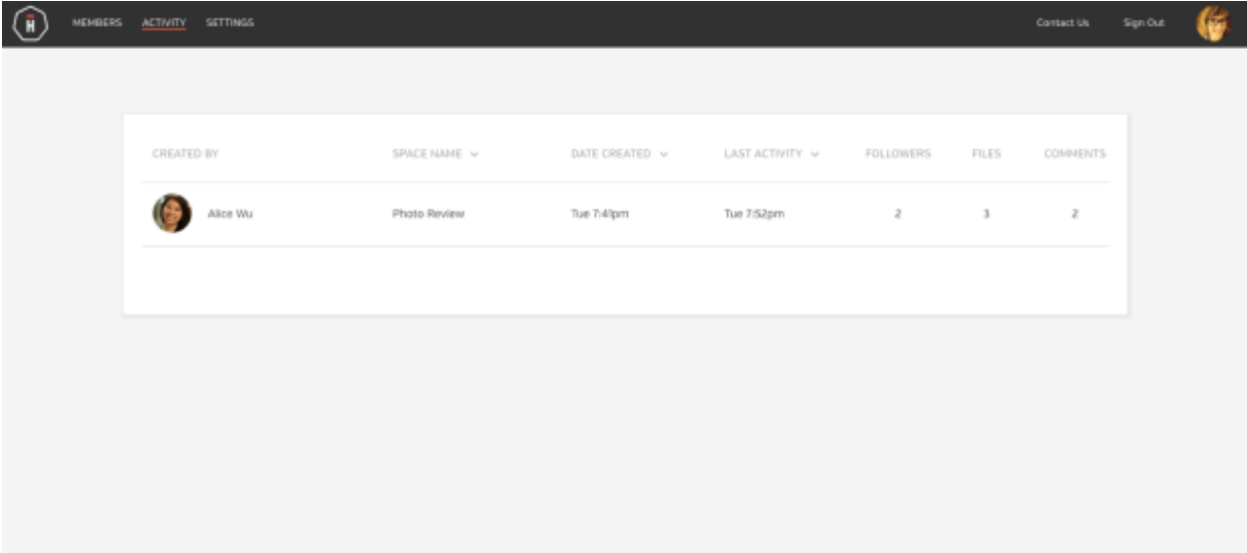
If you need to disable a member, select the menu button and choose **disable**. A message will appear to confirm that you want to disable that member. A disabled member will appear on your member's list as **disabled** in red under the status column. You may re-enable the user at any time.

Activity Tracker


Activity Tracker allows you to view your members Space Activity. You will see an Activity tab next to the Members tab when you open your Admin panel.

You can see the **Space Name, Date Created, Last Activity, Followers, Files** and the number of **Comments** in the Space. You can also see the avatar of who created the Space in the **Created By** column.

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The screenshot shows the Hightail Admin interface. At the top, there is a navigation bar with a logo on the left and links for 'MEMBERS', 'ACTIVITY', and 'SETTINGS'. On the right side of the navigation bar, there are links for 'Contact Us' and 'Sign Out', along with a user profile picture. The main content area displays a table of activity records.

CREATED BY	SPACE NAME	DATE CREATED	LAST ACTIVITY	FOLLOWERS	FILES	COMMENTS
 Alice Wu	Photo Review	Tue 7:41pm	Tue 7:52pm	2	3	2

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Settings

As the Administrator of your Hightail account, you set specific permissions for your entire organization.

From the **Settings** tab from your Admin panel you can set permissions for all users in your account. Note, these permissions can not be overridden from by end users.

Space Permissions

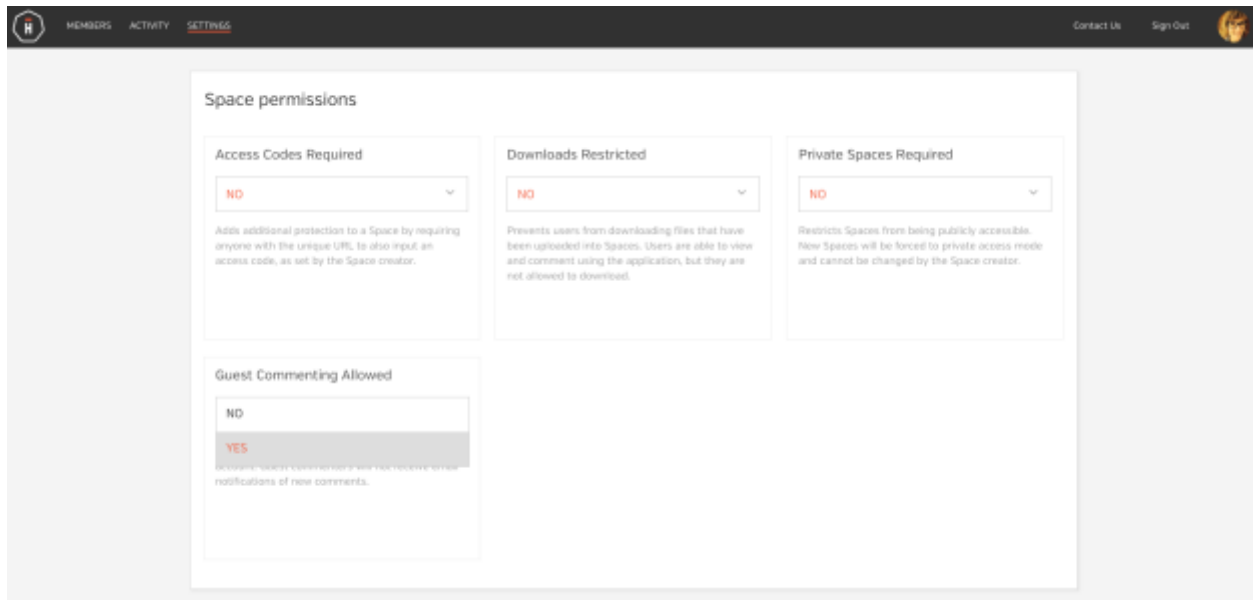
There are four different Space permissions available that you can apply to all members' Spaces.

Access Codes Required – Adds additional protection to a Space by requiring anyone with the unique URL to also input an access code as set by the Space creator.

Downloads Restricted – This prevents users from downloading files that have been uploaded into Spaces. Users are able to view and comment using the application, but they are not allowed to download.

Private Spaces Required – This policy will restrict Spaces from being publicly accessible. New Spaces will be forced to private access modes and cannot be changed by the Space creator.

Guest Commenting – Allow users to comment without creating a Hightail account. Guest commenters will not receive email notifications of new comments.



The screenshot shows the 'Space permissions' settings page in the Hightail Admin interface. The page has a dark header with 'MEMBERS', 'ACTIVITY', and 'SETTINGS' tabs, and 'Contact Us' and 'Sign Out' links. The main content area is titled 'Space permissions' and contains four settings cards:

- Access Codes Required:** A dropdown menu is set to 'NO'. Below it, text reads: 'Adds additional protection to a Space by requiring anyone with the unique URL to also input an access code, as set by the Space creator.'
- Downloads Restricted:** A dropdown menu is set to 'NO'. Below it, text reads: 'Prevents users from downloading files that have been uploaded into Spaces. Users are able to view and comment using the application, but they are not allowed to download.'
- Private Spaces Required:** A dropdown menu is set to 'NO'. Below it, text reads: 'Restricts Spaces from being publicly accessible. New Spaces will be forced to private access mode and cannot be changed by the Space creator.'
- Guest Commenting Allowed:** A dropdown menu is set to 'YES'. Below it, text reads: 'Allows users to comment without creating a Hightail account. Guest commenters will not receive email notifications of new comments.'

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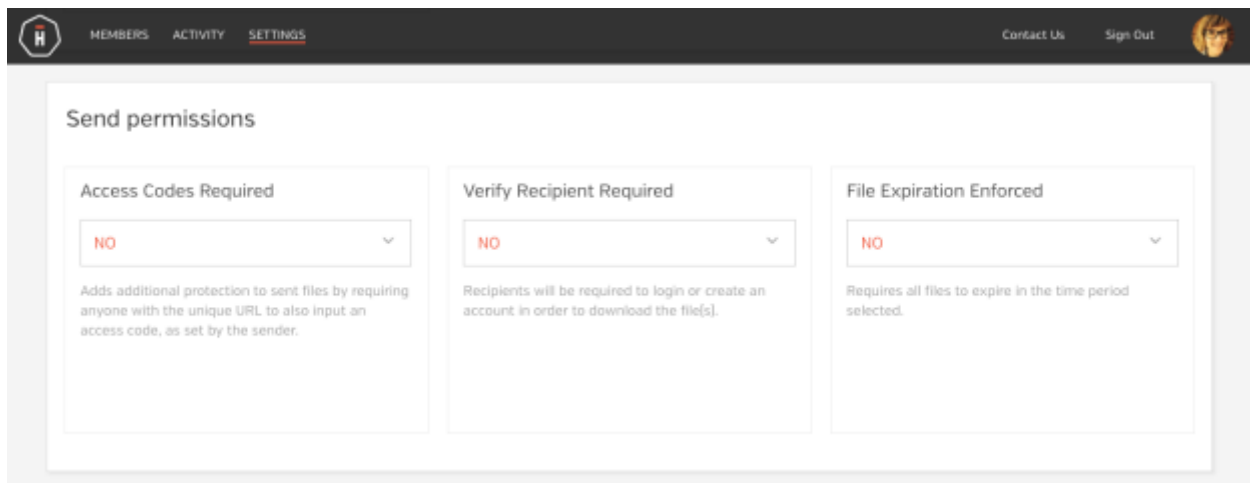
Send Permissions

There are three different Send permissions available that you can apply to all members' Send capabilities.

Access Codes Required – Adds additional protection to sent files by requiring anyone with the unique URL to also input an access code as set by the Sender.

Verify Recipient Required – Recipients will be required to login or create an account in order to download the file(s).

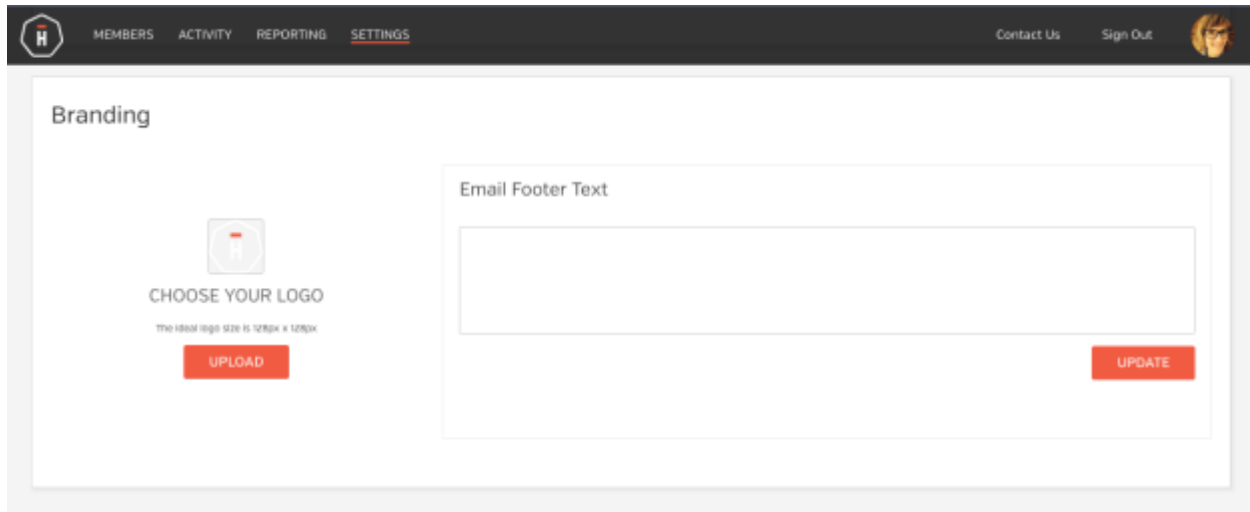
File Expiration Enforced – Requires all files to expire in the time period selected.



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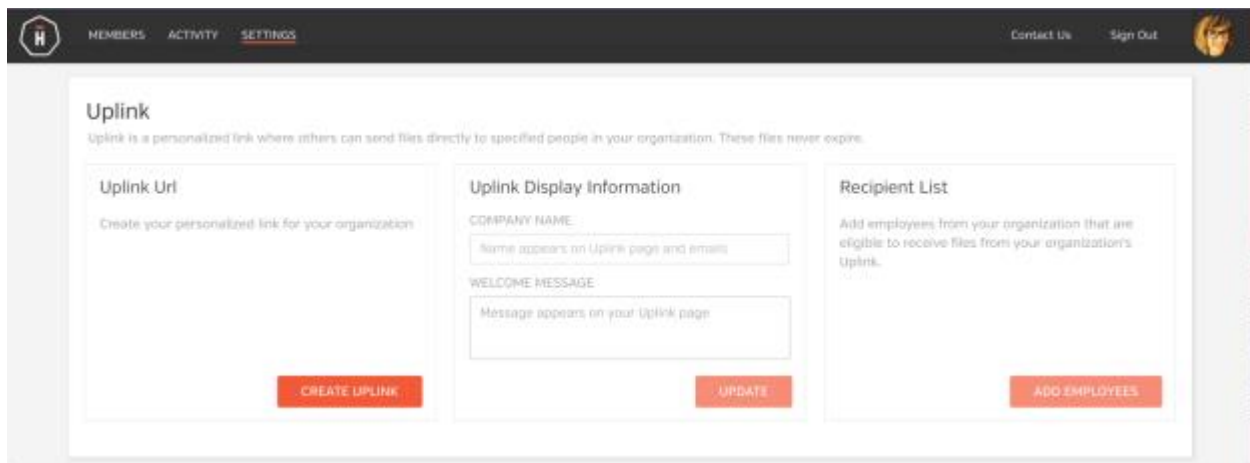
Branding

Choose your logo to brand your Hightail account. The ideal logo size is 128x128 pixels. Enter in specific text into the **Email Footer Text** section to customize your Hightail generated email notifications.



Uplink

Uplink is a personalized link where others can send files directly to specified people within your organization. Click on the **Create Uplink** button to create a personalized link for your organization. Please note that the Uplink name cannot contain spaces or underscores within the name. Enter the Display Information including your company name and the welcome message that will appear on your Uplink page and within emails. You can then add employees from your organization that are eligible to receive files for your organization's Uplink. The files that are received via Uplink never expire.

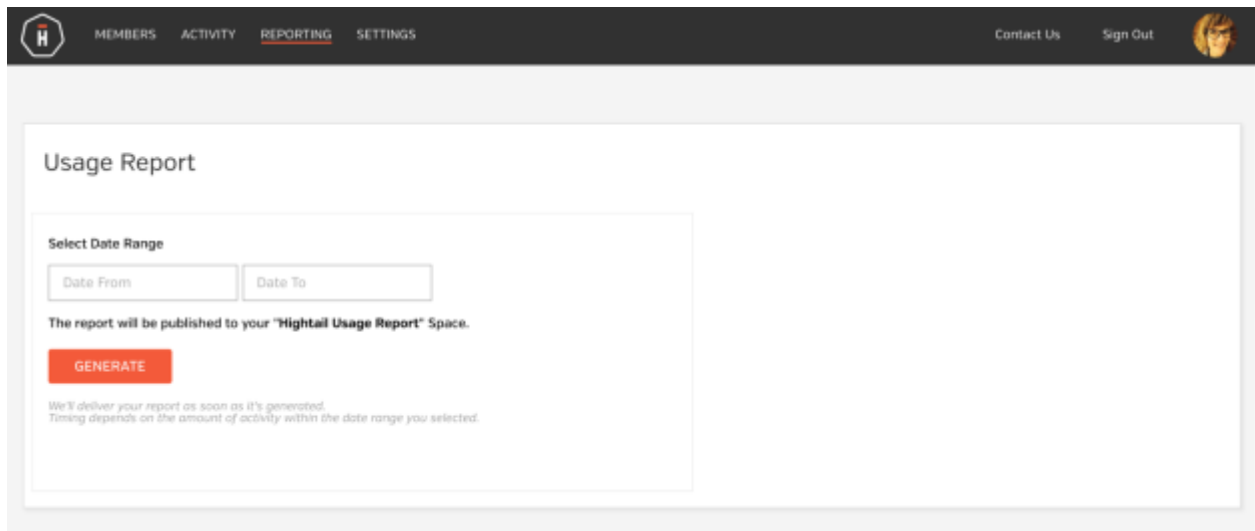


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Reporting

With our reporting functionality you can see how your users are utilizing the Hightail service.

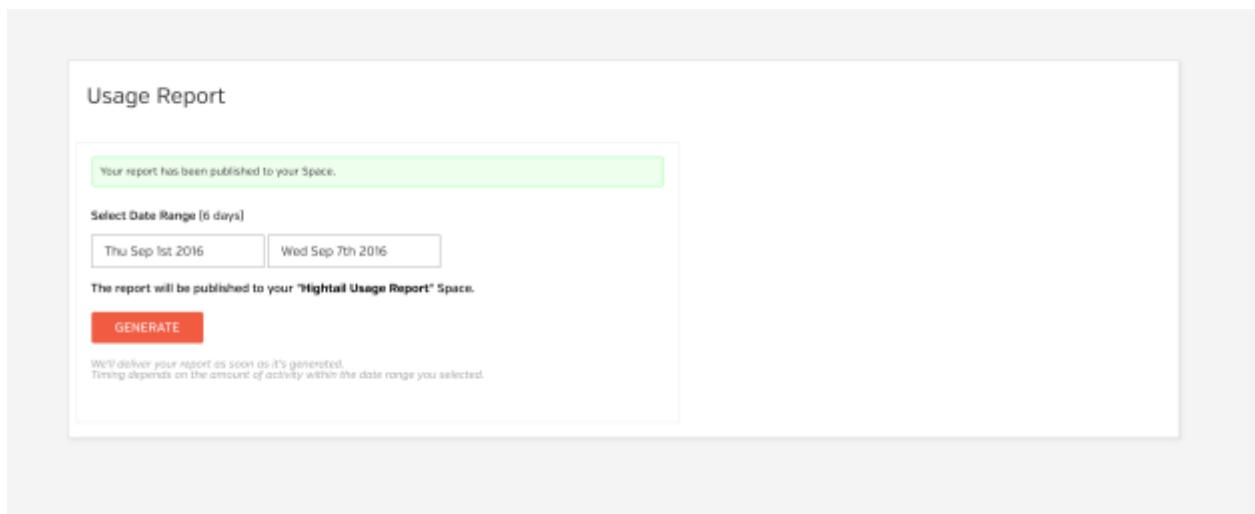
Start by logging into your account and clicking **Admin Console> Reporting**, select a date range using the calendar views for the start and end date, then click on the **Generate** button.



The screenshot shows the Hightail Admin Console navigation bar with 'MEMBERS', 'ACTIVITY', 'REPORTING' (highlighted), and 'SETTINGS'. On the right, there are links for 'Contact Us' and 'Sign Out' along with a user profile picture. The main content area is titled 'Usage Report' and contains a form with the following elements:

- Select Date Range**: Two input fields labeled 'Date From' and 'Date To'.
- The report will be published to your "Hightail Usage Report" Space.**
- GENERATE**: A red button to generate the report.
- We'll deliver your report as soon as it's generated. Timing depends on the amount of activity within the date range you selected.

Once you click on generate, a Space will be created for all of your **Hightail Usage Reports**. When the report is ready, you will see an indication that the report has been published. Navigate to your Spaces and you will have access to two .csv reports. One report will include all user collaboration and the second report will include all send activity within the specified date range.



This screenshot shows the 'Usage Report' form after a report has been generated. A green success message is displayed at the top: 'Your report has been published to your Space.' Below this, the form is pre-filled with a date range: 'Select Date Range [6 days]' with 'Thu Sep 1st 2016' and 'Wed Sep 7th 2016'. The 'GENERATE' button is still present, and the same disclaimer text is shown at the bottom.

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Dashboard

We've introduced a new way for your teams to move projects forward and for your Admins to track the progress of their teams. **My Hightail** will be a new view for you and your teams to track activity and **To-Dos**.

Select **My Hightail** to get a view of **What's New**, **Team View** and **Tracker**. To make navigation a bit more intuitive, the **Tracker** has moved to your Activity View.

What's new

The left bar displays filters for you to view and manage specific activity. You can filter by **All**, **Approvals**, **Comments** and **Follow-ups**.

- **All** includes **Approvals**, **Comments** and **Follow-ups**.
- **Approvals** includes any work you requested for approval, has been approved and you have personally approved.
- **Comments** includes any of your files including the comments on those files.
- **Follow-ups** includes any of your work that has been marked as **needs follow-up**.

The Center column will display your activity as you have selected from the left sidebar as defined.

The right column lists **My To-Dos** which is a list of any actions assigned to you or **Assigned by me** which is a list of actions assigned to others by you.

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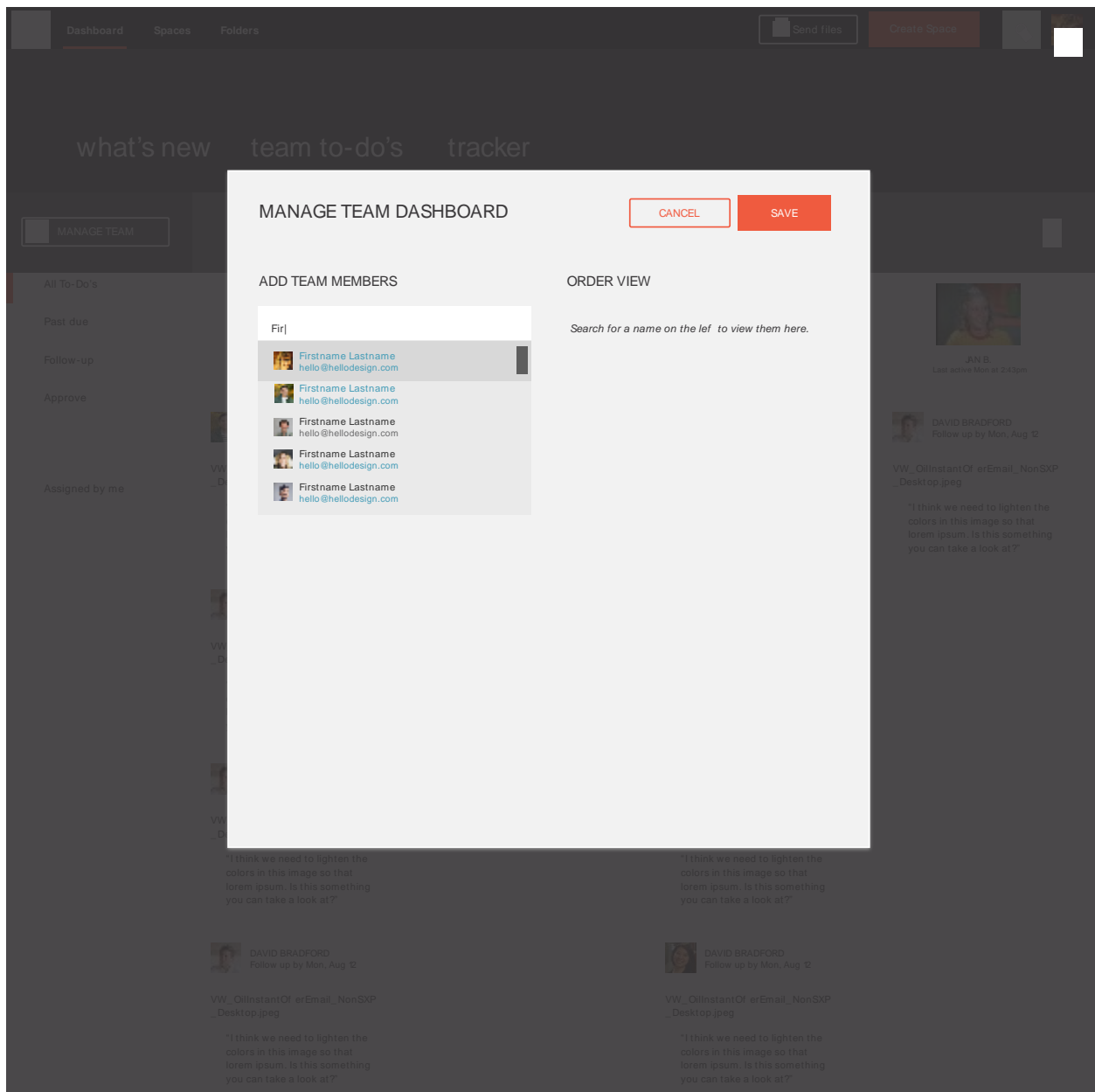
The screenshot displays the Hightail Business Admin interface. At the top, there is a navigation bar with 'My Hightail', 'Spaces', and 'Folders' tabs. On the right side of this bar are buttons for 'Send files', 'Create a Space', and search icons. Below the navigation bar, there are three main sections: 'what's new', 'team view', and 'tracker'. On the left side, a sidebar contains navigation options: 'All', 'Approvals', 'Comments', and 'Follow-ups'. The main content area is divided into three vertical activity feeds. The top feed shows a post by 'Billy Ocean' titled 'Cool New Ads' from Monday 12:00pm, featuring an advertisement image with the text 'Set yourself up to save—both now and later.' and a 'Space name' section indicating 22 files, 55 comments, and 3 followers. The middle feed shows a post by 'Billy Ocean' titled 'approved 2 files in Cool New Ads' from Monday 12:45pm, displaying two file thumbnails with green checkmarks and labels 'File name.jpg'. The bottom feed shows a post by 'Billy Ocean' titled 'assigned a follow-up to you for Sept 21 on file name.jpg in Cool New Ads' from Monday 12:45pm, with a 'Follow-up' tag and the text 'Alex from Target wants to see a draft of this next Wednesday', accompanied by the same advertisement image. On the right side, there is a 'MY TO-DO'S' section with three items: a comment by 'Mitt Derron' from September 22 regarding image colors, a task by 'Billy Ocean' from August 1 to 'Approve 4 files in Medicare Old Ads' with file names ad4.jpg through ad6.jpg, and another task by 'Billy Ocean' from August 1 to 'Approve 5 files in Cool New Ads' with file names ad4.jpg through ad6.jpg.

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Team view

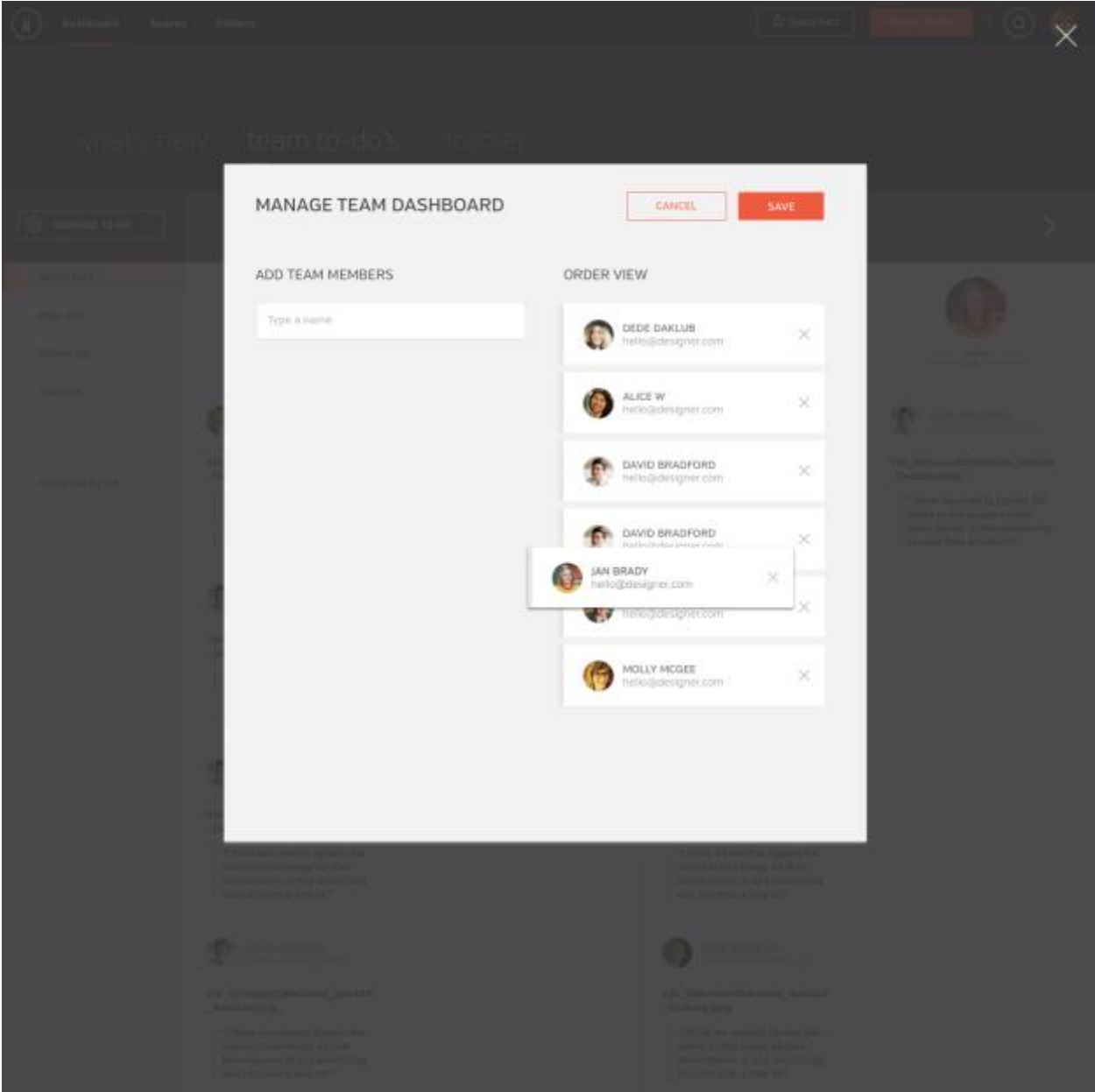
As an Admin of an organization, you can view your team's latest activity and **To-Dos** at a glance.

To get started, you'll need to build a team by selecting members of your Hightail organization. Click on the **Manage Team** button to add members from your organization. Start by typing in the team members First Name, then select the appropriate person from the drop down list of members. After you have selected all members of your team click on the **Save** button.



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Order your list by dragging and dropping users to customize your team view. Click on the **Save** button when you have the team organized in the preferred order.



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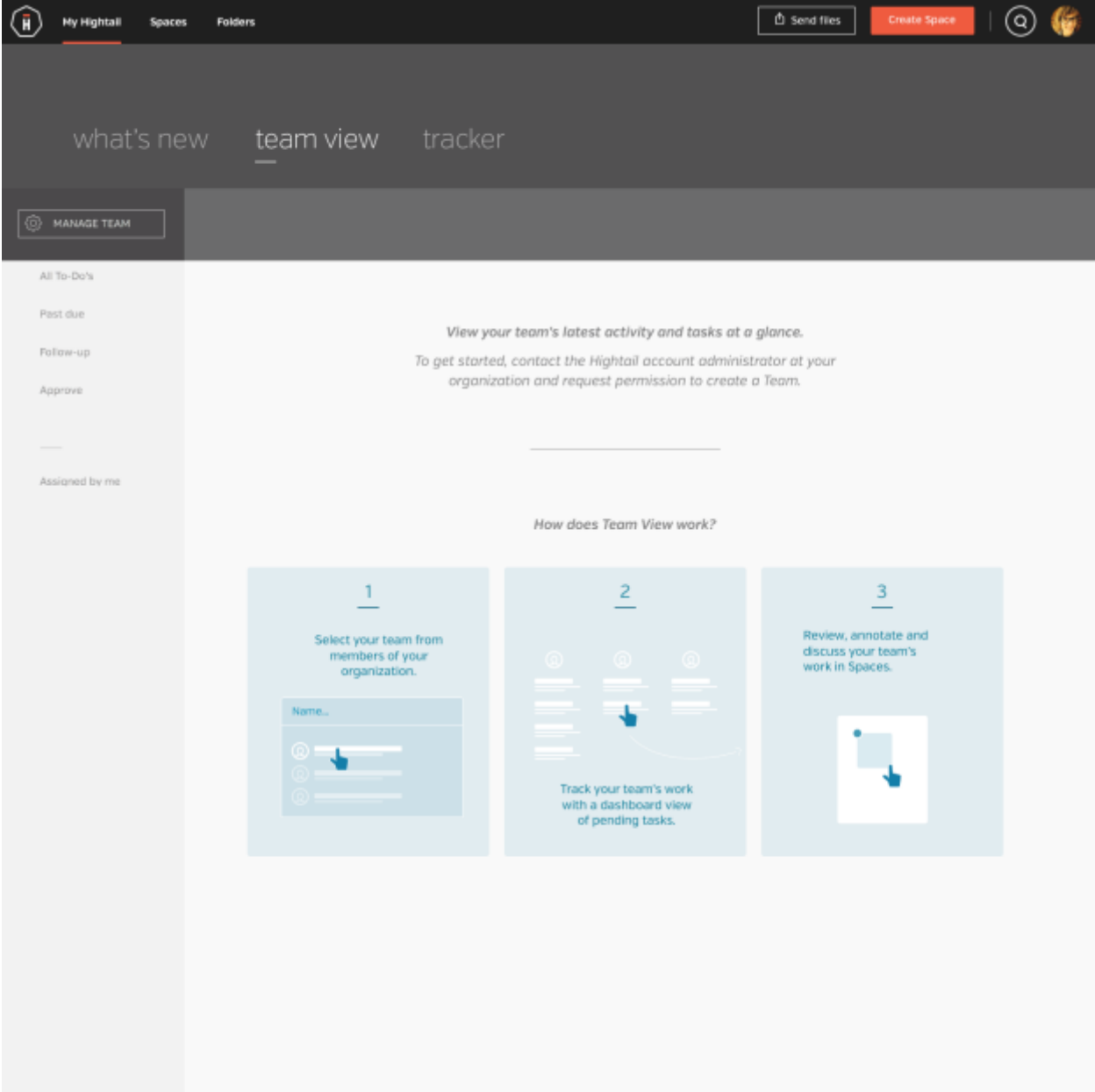
Track your team's work with a dashboard view of pending tasks. From your **Team View**, your team's avatars will be placed in the order in which you have organized your view. On the left bar, filter your team's views by **All action items**, **Follow-up**, **Approve**, or **Assigned by me**.

Review, annotate and discuss your team's work in Spaces, which will populate the dashboard view.

The screenshot displays the Hightail Admin interface. At the top, there are navigation tabs for 'My Hightail', 'Spaces', and 'Folders'. To the right, there are buttons for 'Send files' and 'Create Space'. Below the navigation, there are three main sections: 'what's new', 'team view', and 'tracker'. The 'team view' section is active, showing a 'MANAGE TEAM' button and a 'Show 1-4 of 12 team members' indicator. On the left, there is a filter sidebar with options: 'All action items', 'Follow-up', 'Approve', and 'Assigned by me'. The main content area shows four team members: DEDE D., ALICE W., DAVID B., and JAN B. Each member has a profile card with their name, email, and a list of tasks. The tasks are represented by cards with a user avatar, a date, a description, a file name, and a due date. For example, DEDE D. has four tasks assigned by Mitt Dermon, all due by Wednesday, September 23. ALICE W. has a message stating 'There are no pending requests assigned to Alice.' DAVID B. has two tasks assigned by Mitt Dermon, all due by Wednesday, September 23. JAN B. has one task assigned by Billy Ocean, 'Approve 8 files', with a list of file names (ad2.jpg to ad8.jpg) and a due date of Wednesday, September 23.

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Members of your team will need to have Admin access to create teams.



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Tracker

Spaces Shared With me and **By Me** includes: **Space Name** (as a hyperlink to the Space), the **Members** (hyperlink to the Members list), **Date** the Space was **Created**, date the Space was **Last Updated**, Number of **Files** included in the Space, Number of **Comments** on the Space, a hyperlink to **View Space and Share** directly from the view.

The screenshot shows the Hightail Admin Tracker interface. At the top, there is a navigation bar with 'My Hightail', 'Spaces', and 'Folders' tabs. On the right, there are buttons for 'Send files' and 'Create Space', along with a user profile icon. Below the navigation bar, there are three main sections: 'what's new', 'team view', and 'tracker'. The 'tracker' section is active and displays a table of spaces shared with the user. The table has columns for 'Space', 'Members', 'Created', 'Last updated', 'Files', 'Comments', and 'Actions'. A single row is visible under the 'By me' category, showing a space named 'Space name here' with 13 members, created on August 24, 2016, last updated on August 28, 2016, with 1 file and 1 comment. The 'Actions' column for this row contains 'View Space' and 'Share' links. Below the table, there are sections for 'FILES' with sub-sections for 'Delivered' and 'Received'.

SPACES SHARED		SPACES SHARED WITH ME						
With me	Space	Members	Created	Last updated	Files	Comments	Actions	
By me	Space name here	13 members	August 24, 2016	August 28, 2016	1	1	View Space Share	

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The screenshot shows the Hightail for Business Admin interface. At the top, there is a navigation bar with tabs for 'My Hightail', 'Spaces', and 'Folders'. To the right of these tabs are buttons for 'Send files' and 'Create Space', along with a user profile icon. Below the navigation bar, there are three main navigation options: 'what's new', 'team view', and 'tracker'. The main content area is divided into two sections: 'SPACES SHARED' and 'SPACES SHARED WITH ME'. Under 'SPACES SHARED', there are two sub-sections: 'With me' and 'By me'. The 'By me' sub-section contains a table with the following data:

Space	Members	Created	Last updated	Files	Comments	Actions
Space name here	13 members	August 24, 2016	August 28, 2016	1	1	View Space Share

Below the table, there are sections for 'FILES', 'Delivered', and 'Received'.

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Files Delivered includes: **Date** delivered, the email address of the **Recipient**, **Content Delivered**, hyperlink to **Download files** and a hyperlink to **View files**.

My Hightail Spaces Folders

Send files
Create Space
⌵

what's new
team view
tracker

SPACES SHARED	FILES RECEIVED BY ME								
	Date	Recipients	Content	Views	Downloads	Actions			
With me	August 24, 2016	hello@email.com	filename.gif	1	1	View activity	Forward	Delete	
	August 24, 2016	hello@email.com	filename.gif	0	0	View activity	Forward	Delete	
	August 24, 2016	hello@email.com	filename.gif	1	1	View activity	Forward	Delete	
By me	August 24, 2016	hello@email.com	filename.gif	1982	6780	View activity	Forward	Delete	
	Delivered	August 24, 2016	hello@email.com	filename.gif	1	1	View activity	Forward	Delete
	Received	August 24, 2016	hello@email.com	filename.gif	1	1	View activity	Forward	Delete
		August 24, 2016	hello@email.com	filename.gif	1	1	View activity	Forward	Delete
		August 24, 2016	hello@email.com	filename.gif	1	1	View activity	Forward	Delete

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Files Received includes: **Date** delivered, the email address of the **Recipient**, **Content Received**, number of times the file was **Viewed**, number of times the file had been downloaded, a hyperlink to **View Activity**, a hyperlink to **Forward** files, and a **Delete** option.

The screenshot shows the Hightail Admin interface. At the top, there is a navigation bar with 'My Hightail', 'Spaces', and 'Folders' tabs. On the right, there are buttons for 'Send files' and 'Create Space'. Below the navigation bar, there are links for 'what's new', 'team view', and 'tracker'. The main content area is divided into two sections: 'SPACES SHARED' and 'FILES DELIVERED BY ME'. The 'FILES DELIVERED BY ME' section contains a table with columns for Date, From, Content, and Actions. The table lists several entries, each with a date of August 24, 2016, an email address of hello@email.com, and a placeholder for content. Each entry has two action links: 'Download files' and 'View'.

SPACES SHARED		FILES DELIVERED BY ME			
With me	By me	Date	From	Content	Actions
		August 24, 2016	hello@email.com	Space name goes here	Download files View
		August 24, 2016	hello@email.com	Space name goes here	Download files View
		August 24, 2016	hello@email.com	Space name goes here	Download files View
		August 24, 2016	hello@email.com	Space name goes here	Download files View
		August 24, 2016	hello@email.com	Space name goes here	Download files View
		August 24, 2016	hello@email.com	Space name goes here	Download files View
		August 24, 2016	hello@email.com	Space name goes here	Download files View
		August 24, 2016	hello@email.com	Space name goes here	Download files View
		August 24, 2016	hello@email.com	Space name goes here	Download files View

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Getting Help

Hightail Business Support can be contacted if you ever encounter any issues or have any questions. You can also refer to our support page for frequently asked questions and trouble-shooting steps. You can contact us at:

Enterprise Support: 1 (866) 844-7023

Email: enterprise-support@hightail.com

Sales: 1 (866) 558-7363

Email: sales@hightail.com

Support Page: <https://hightail.com/support>