HIGHTAIL FOR BUSINESS

QUICK START GUIDE FOR ADMINISTRATORS

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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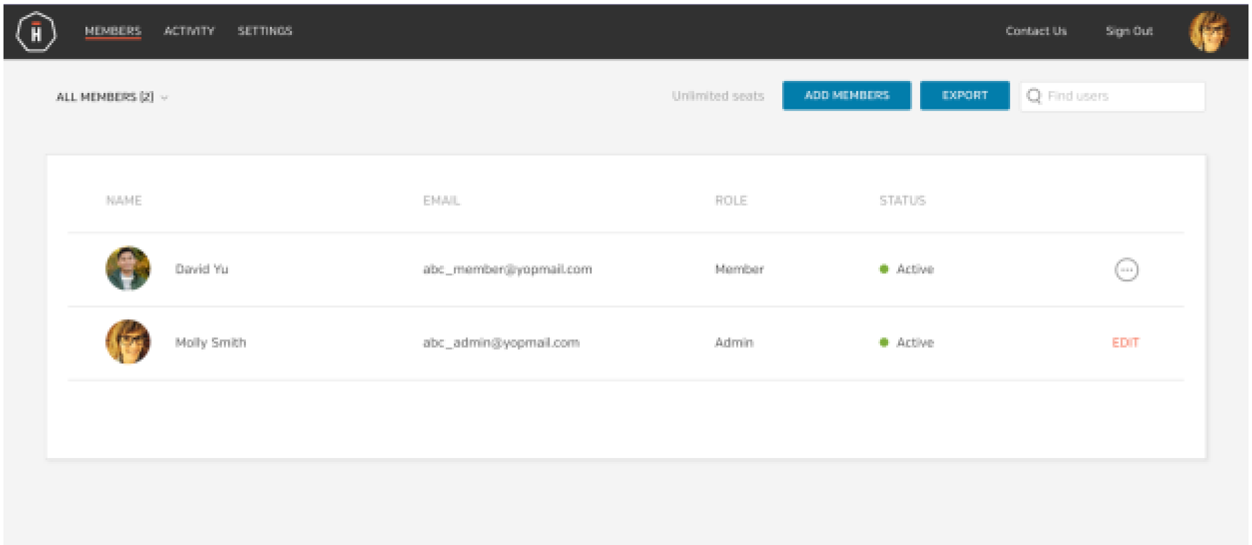
Managing Users

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.



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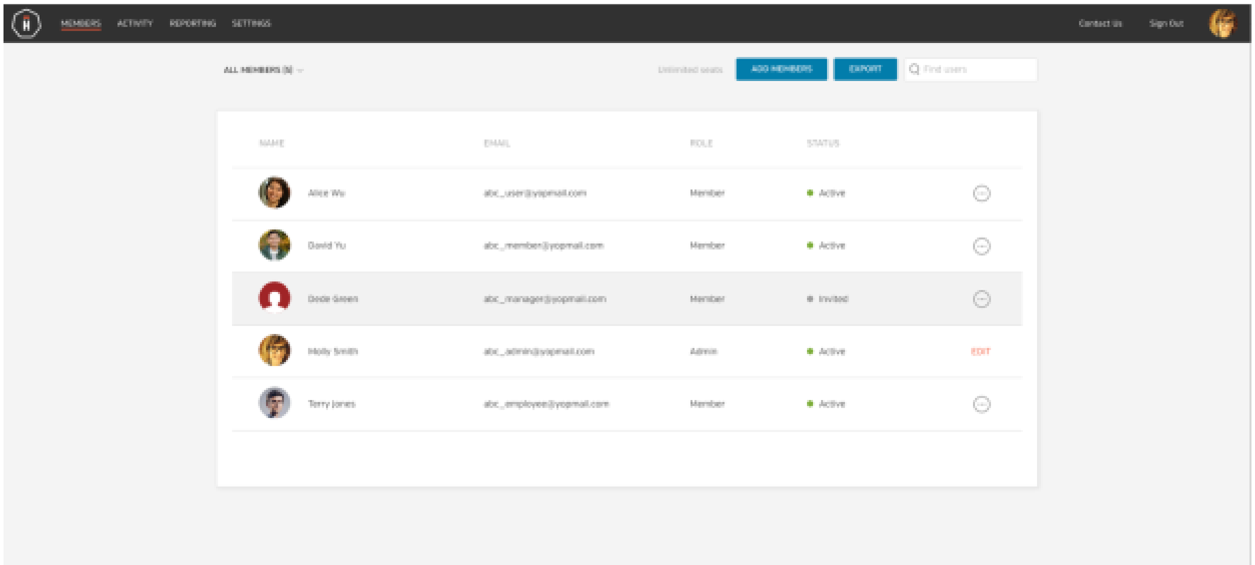
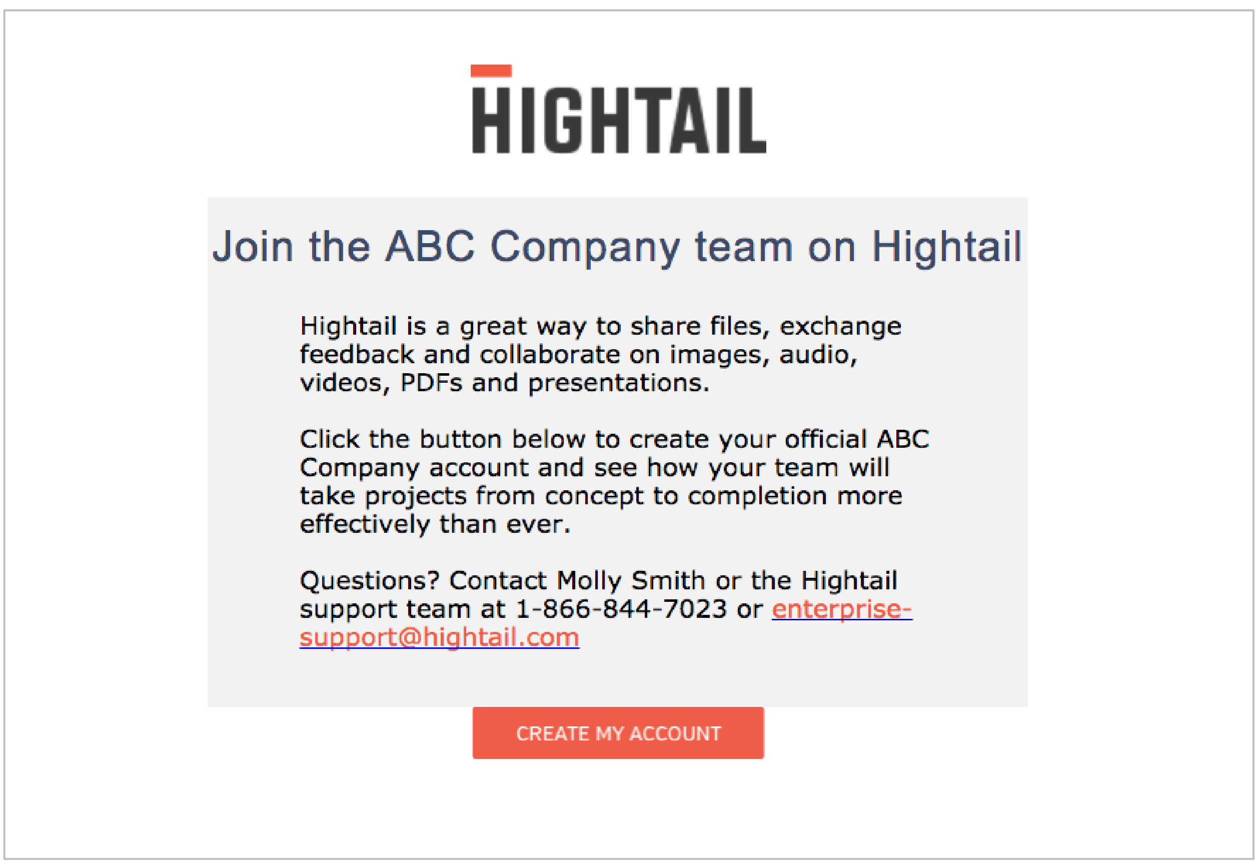
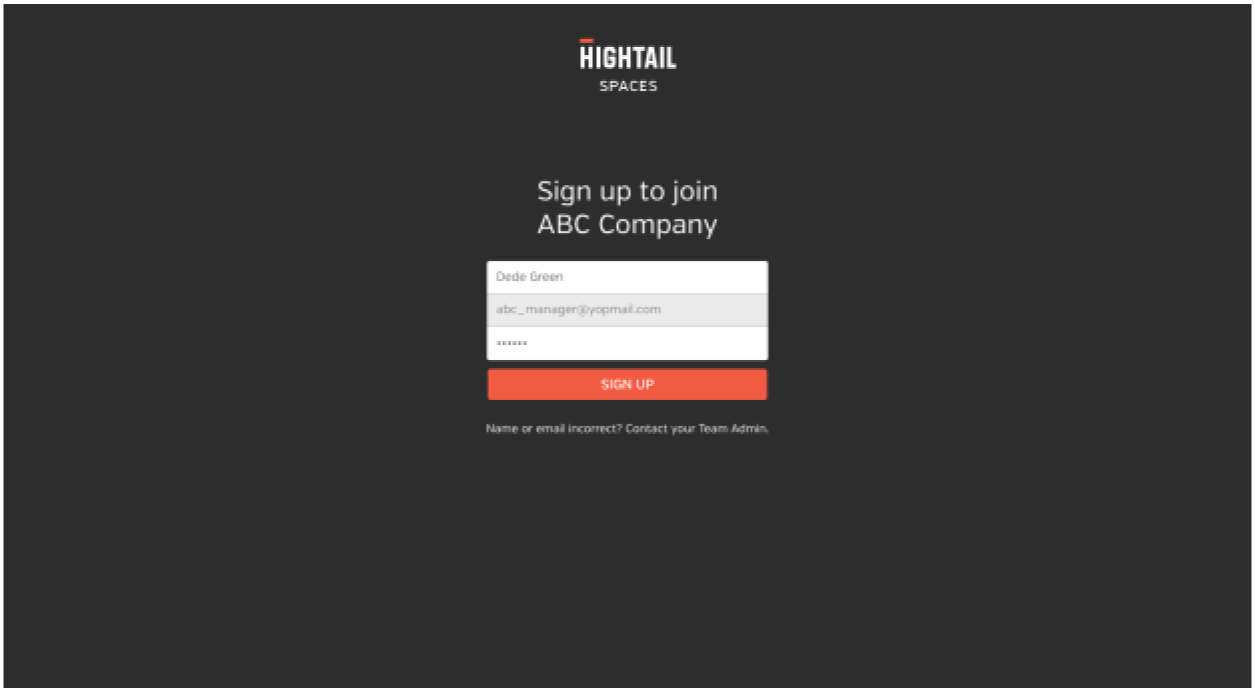
Initially the new member's status will be listed as invited.



The member will receive an email invitation to use Hightail.





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.

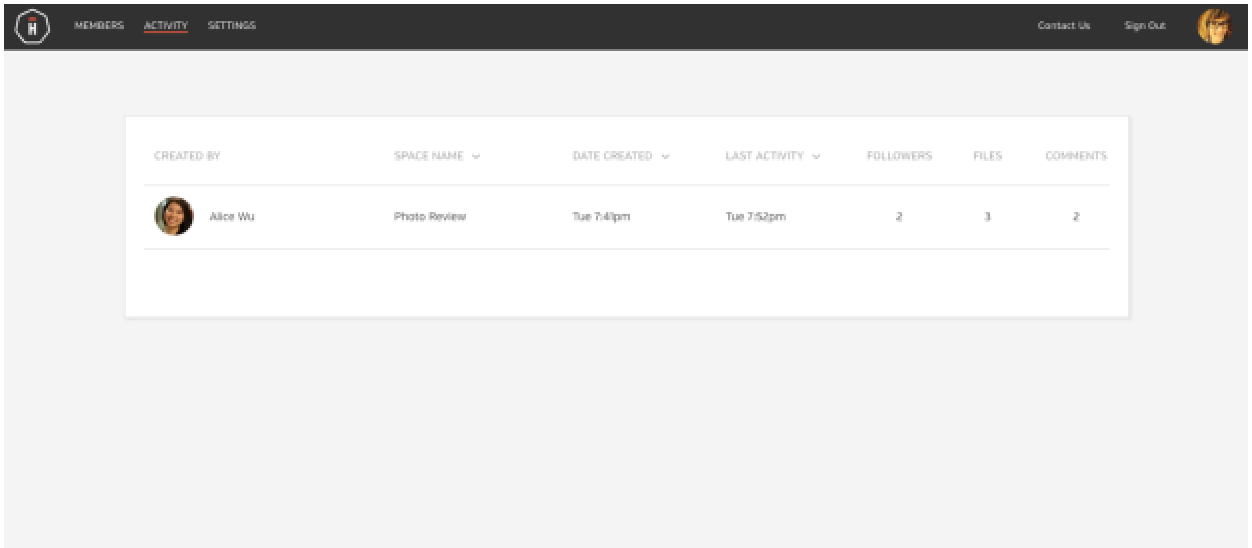
Using the menu button you can either assign a member as a Member or an Admin. Please note that all Admins have the same rights and permissions as the Primary Admin.

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.


MEMBERS
ACTIVITY
SETTINGS
Contact Us
Sign Out
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

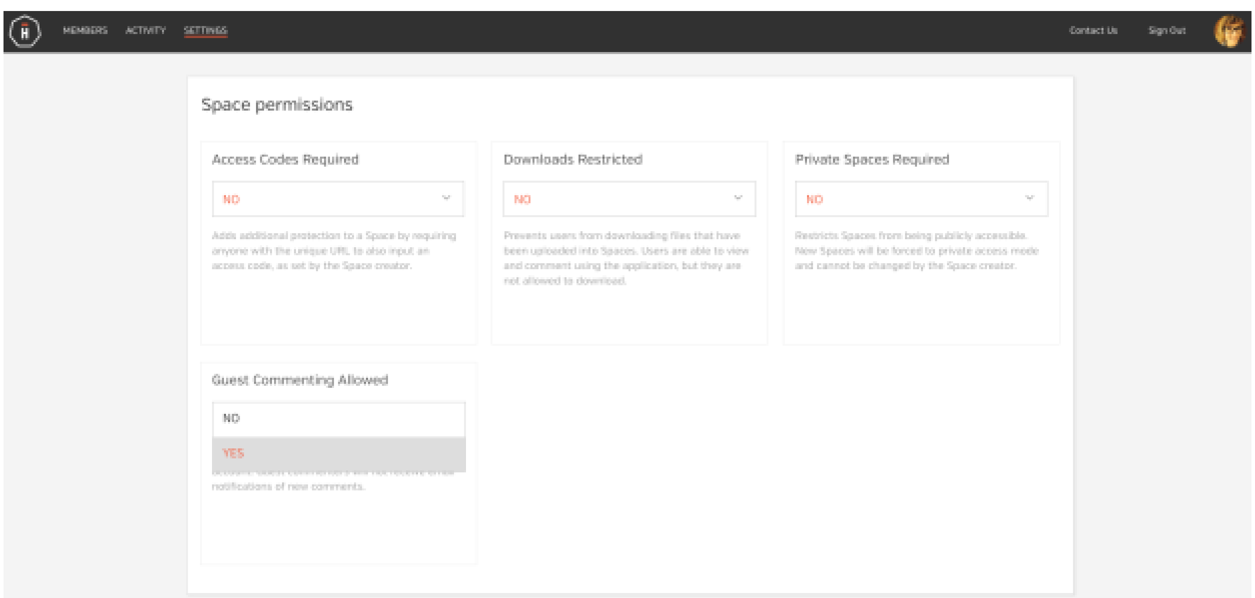
There are four different Space permissions available that you can apply to all members' Spaces.

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.



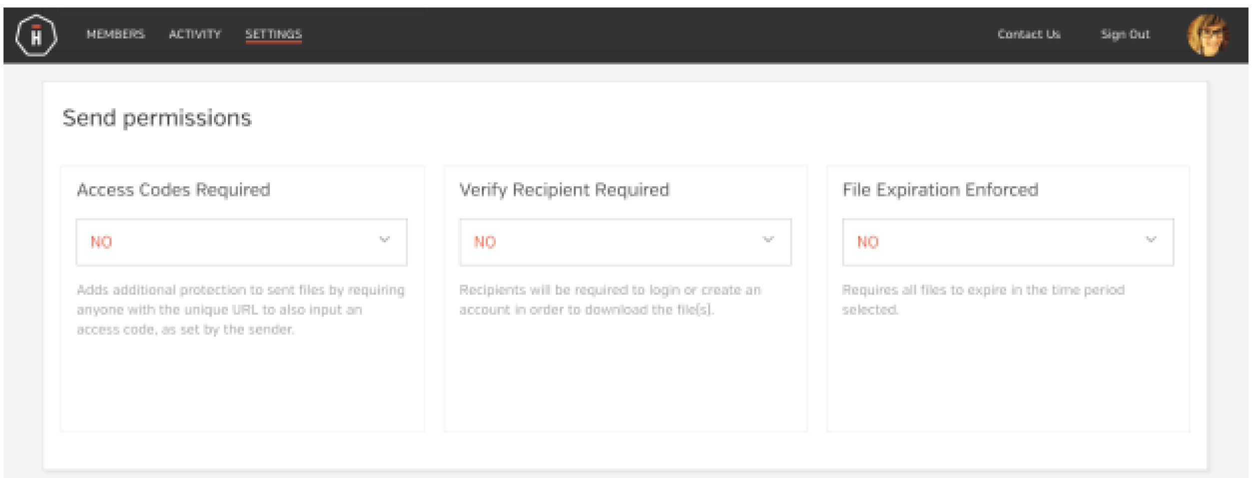
Send Permissions

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.

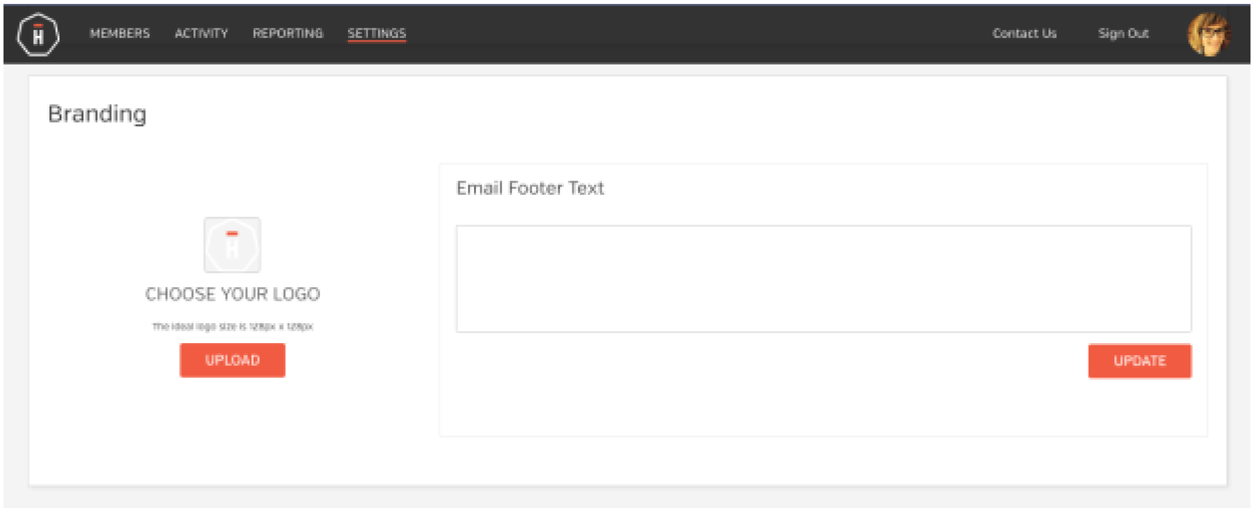
Verify Recipient Required – Recipients will be required to login or create an account in order to download the file(s).

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



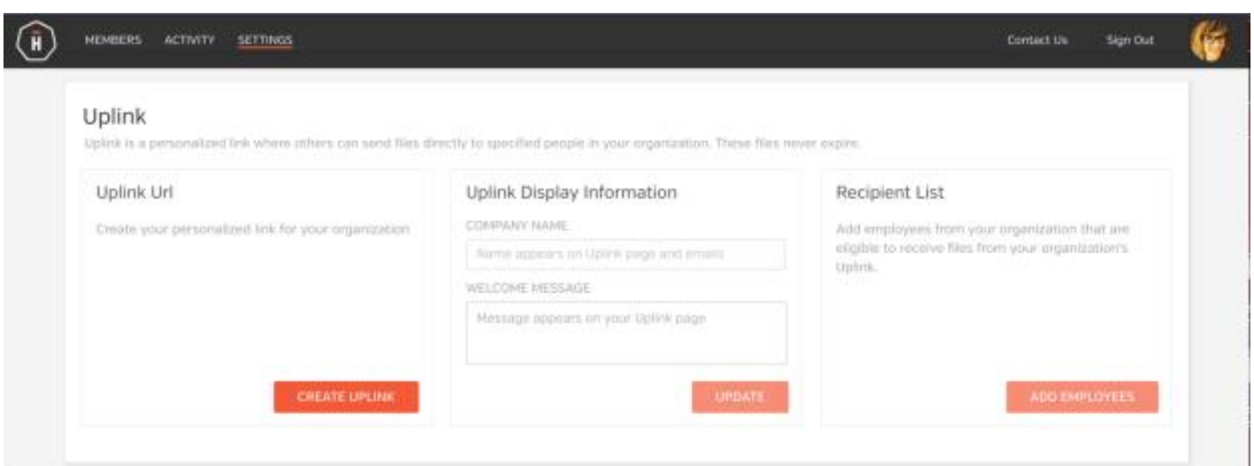
Branding

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

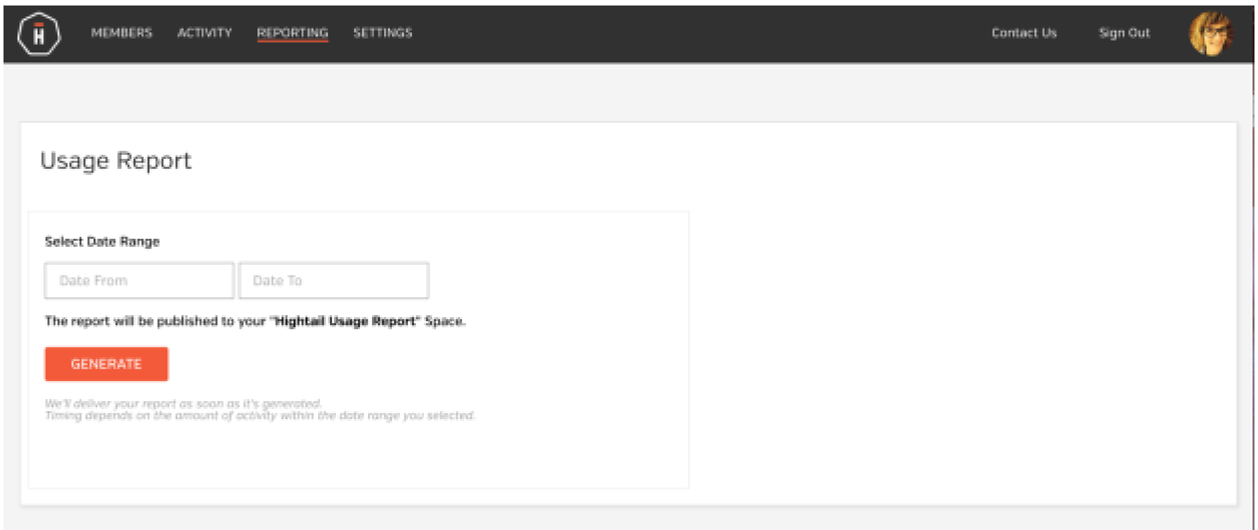
Uplink is a personalized link where others can send files directly to specified people within your organization. Click on the **Create Uplink** button to create a personalized link for your organization. Please note that the Uplink name cannot contain spaces or underscores within the name. Enter the 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.



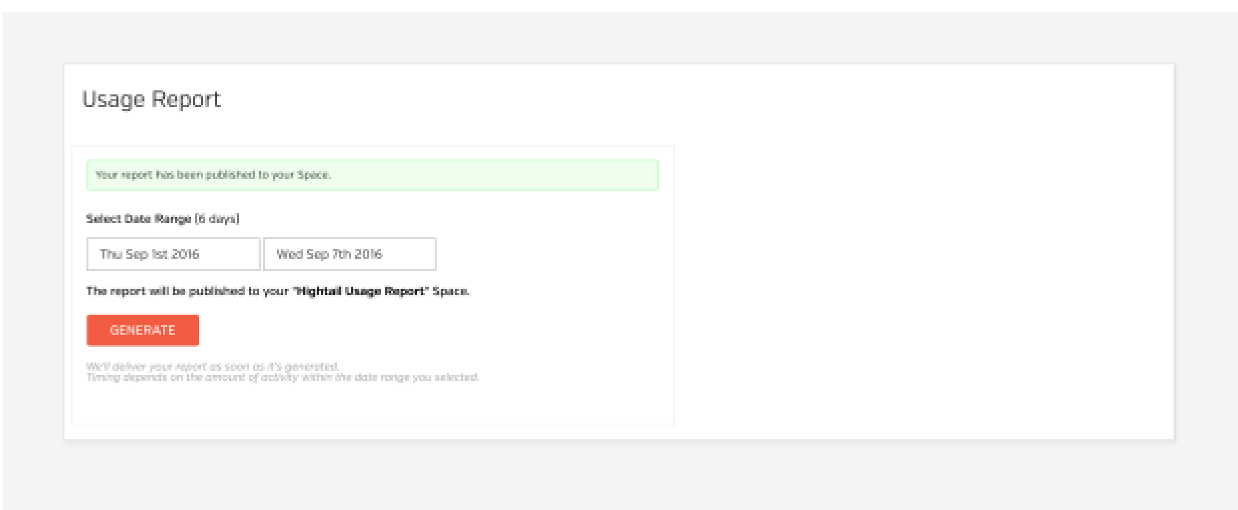
Reporting

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.



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.



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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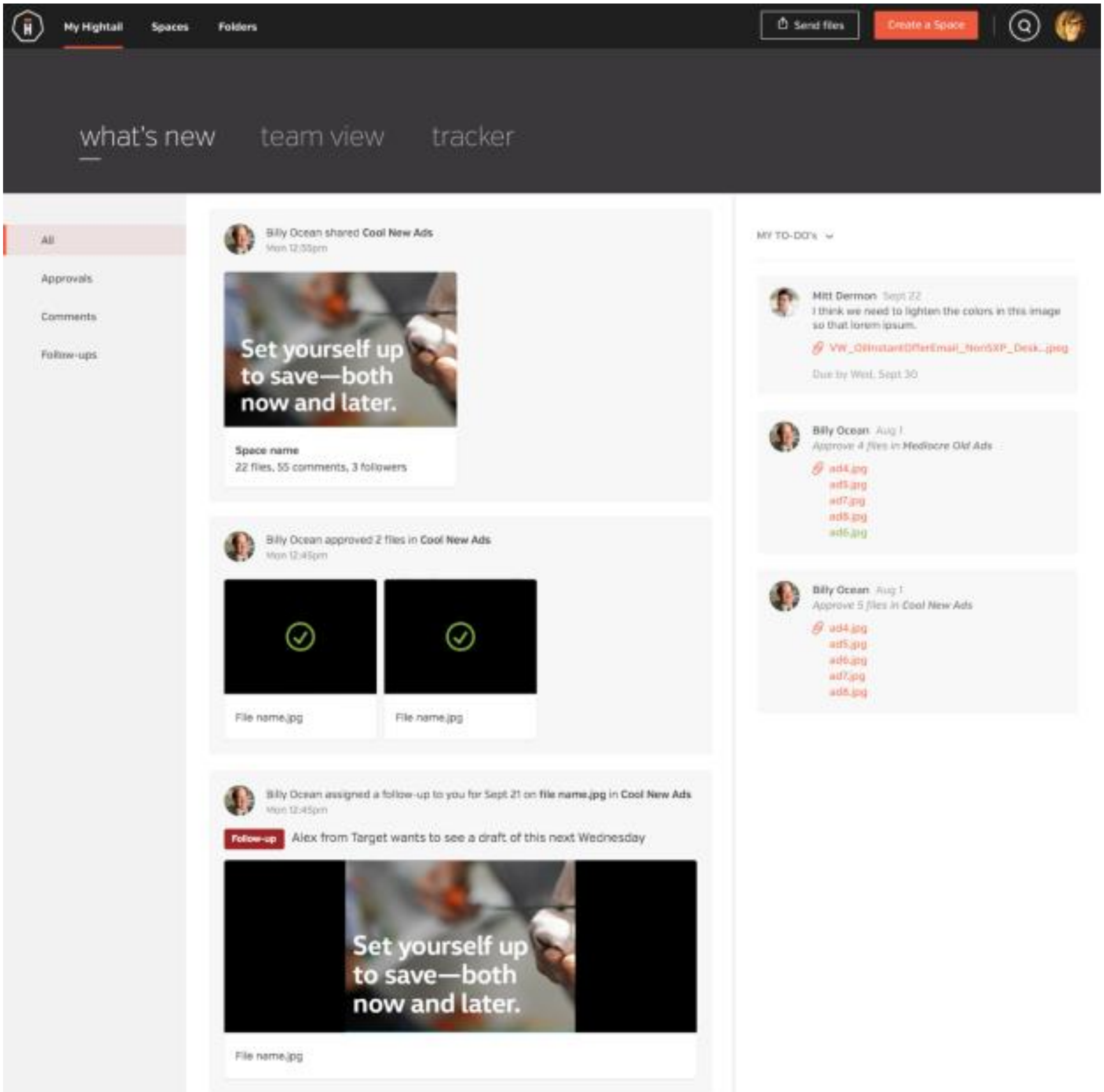

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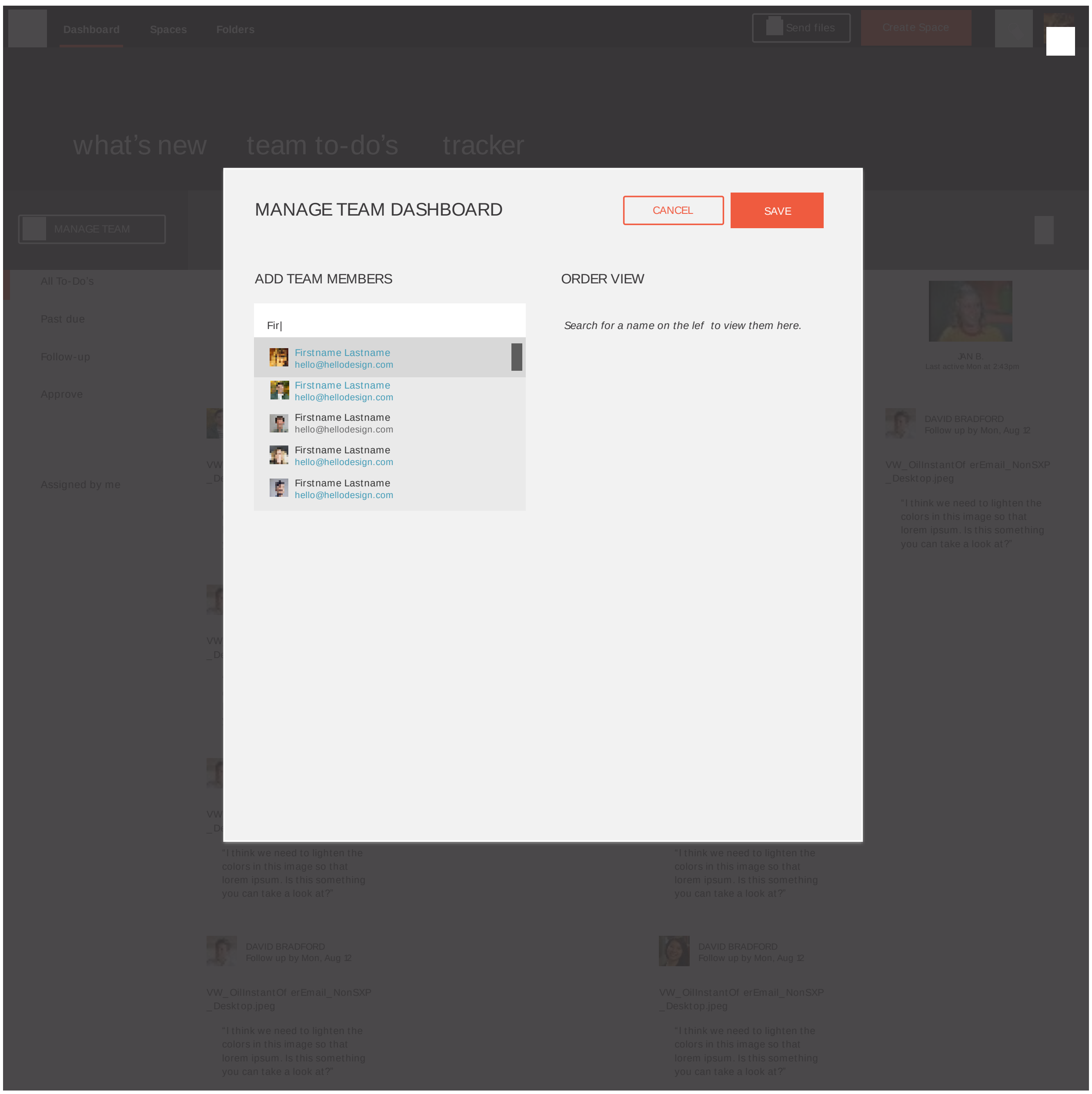
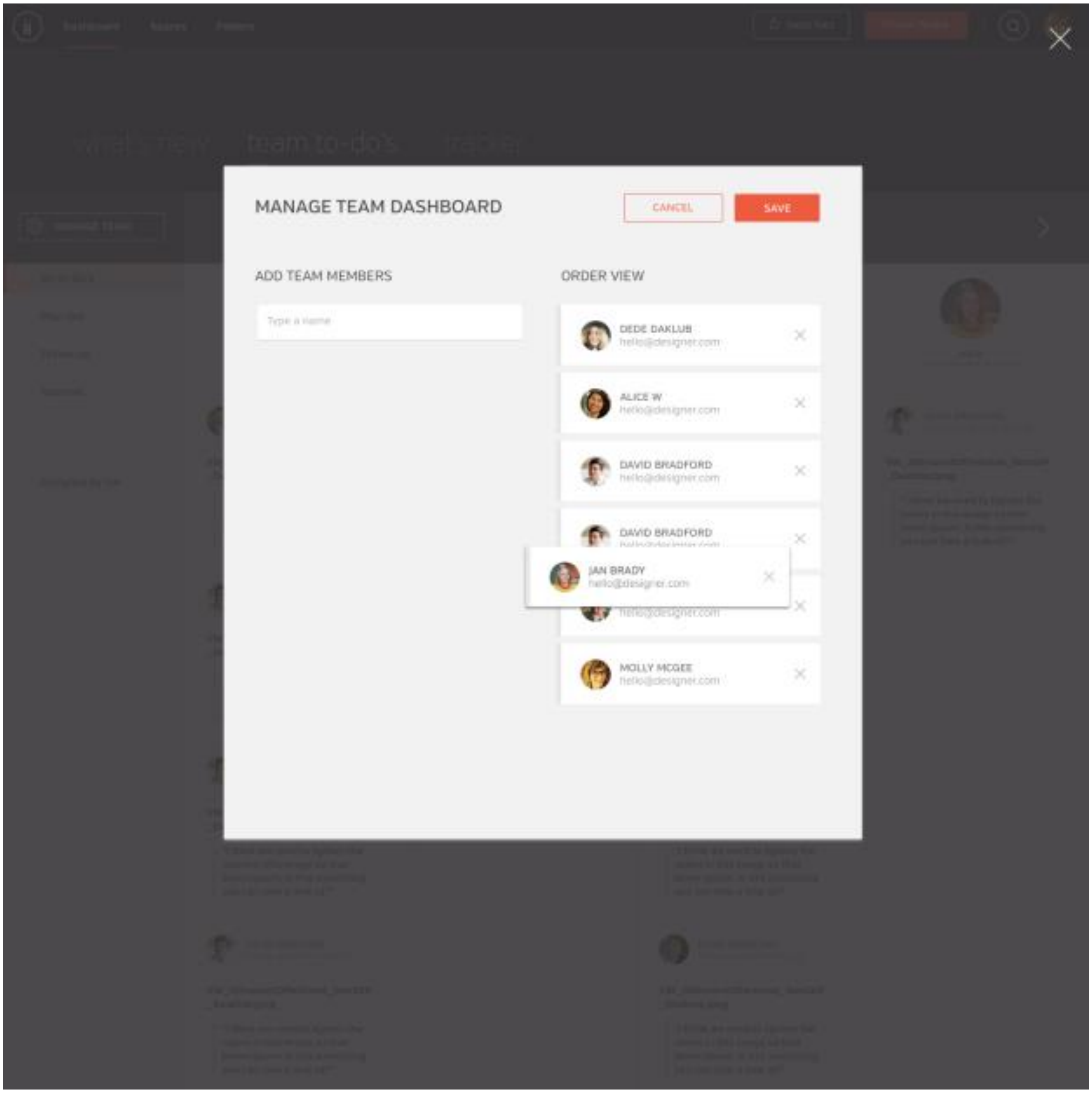
Team view

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.



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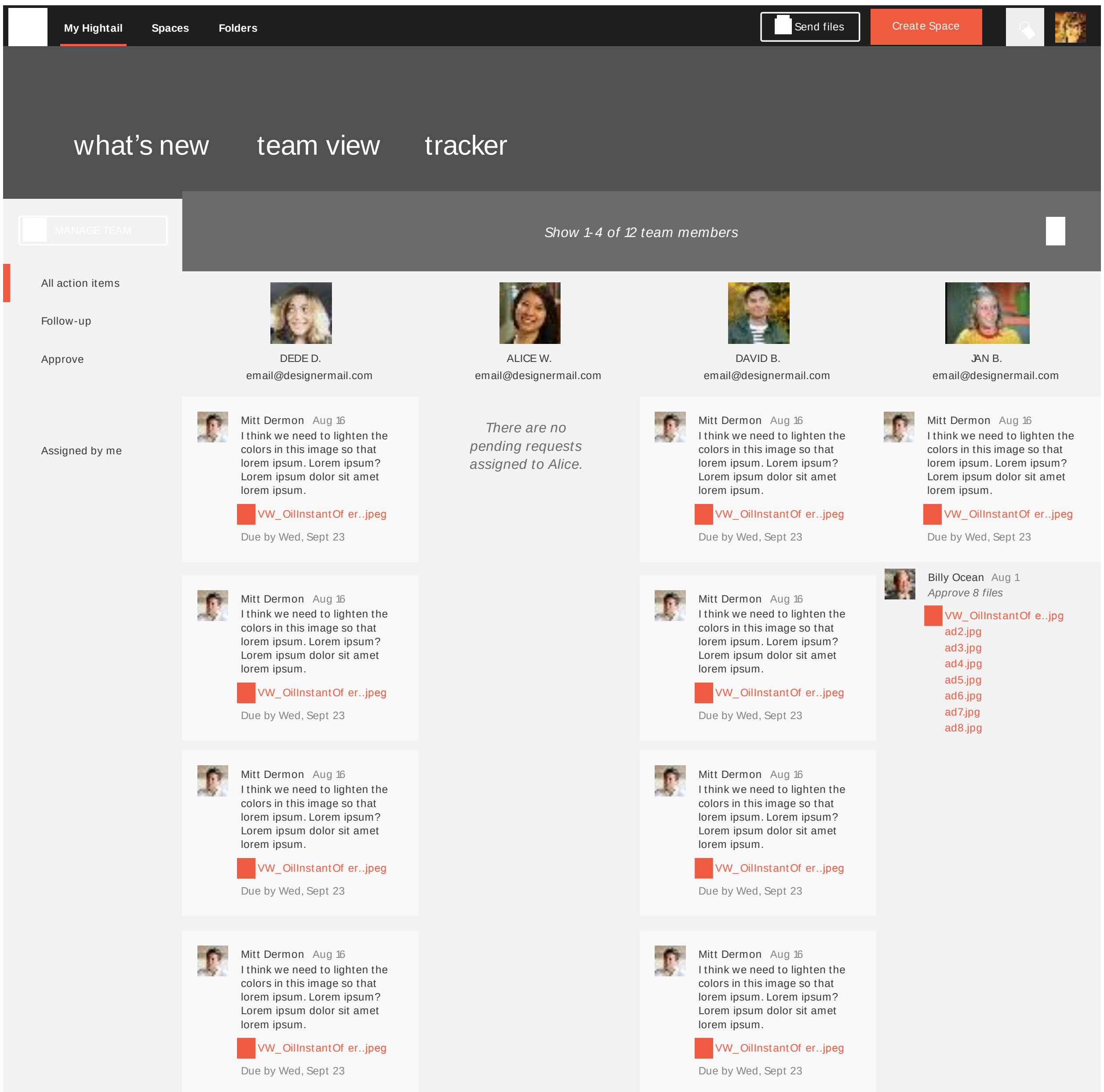
Track your team's work with a dashboard view of pending tasks. From your **Team View,** your team's avatars will be placed in the order in which you have organized your view. On the left bar, filter your team's views by **All action items, Follow-up, Approve,** or **Assigned by me.**
Review, annotate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



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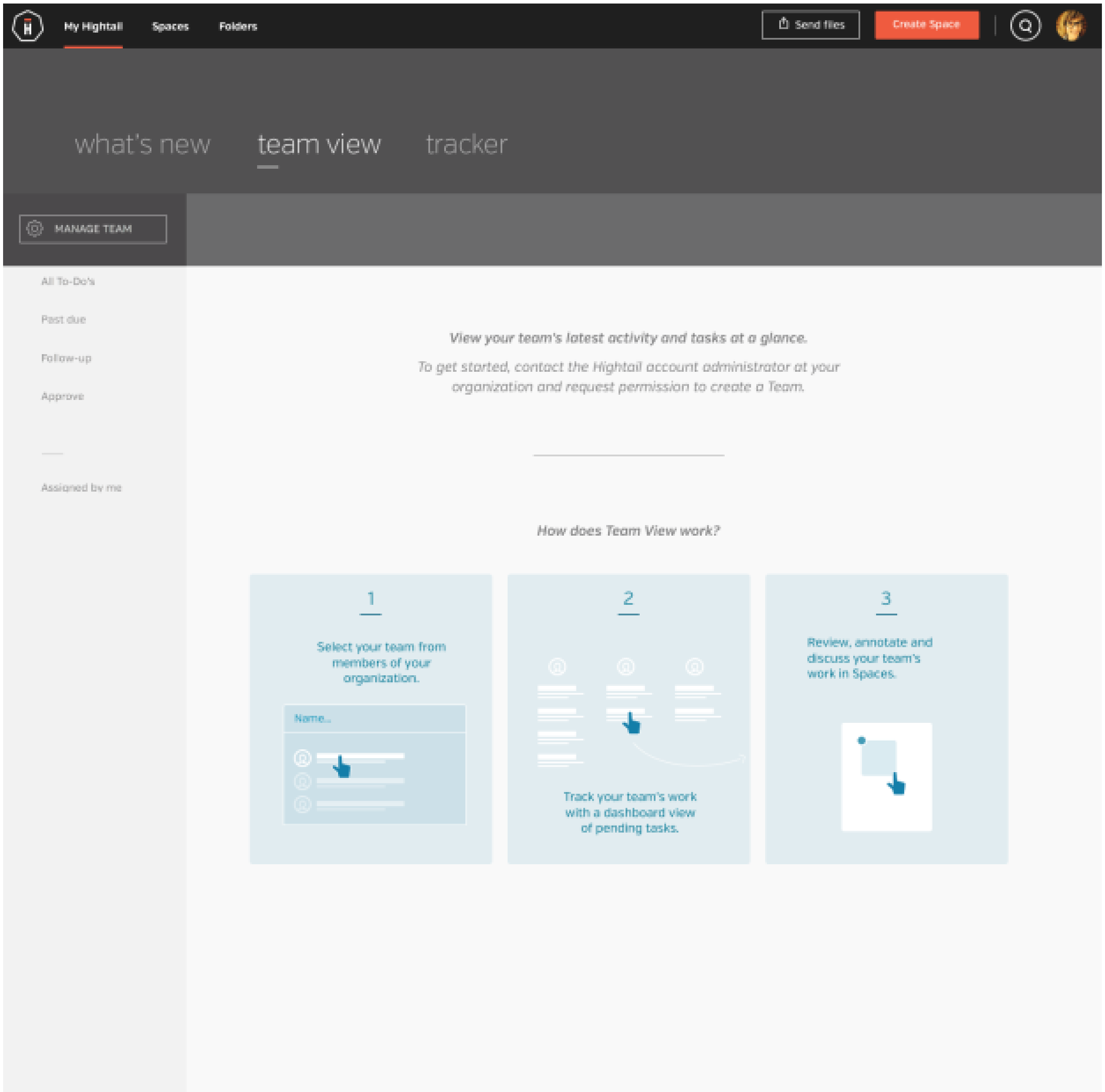
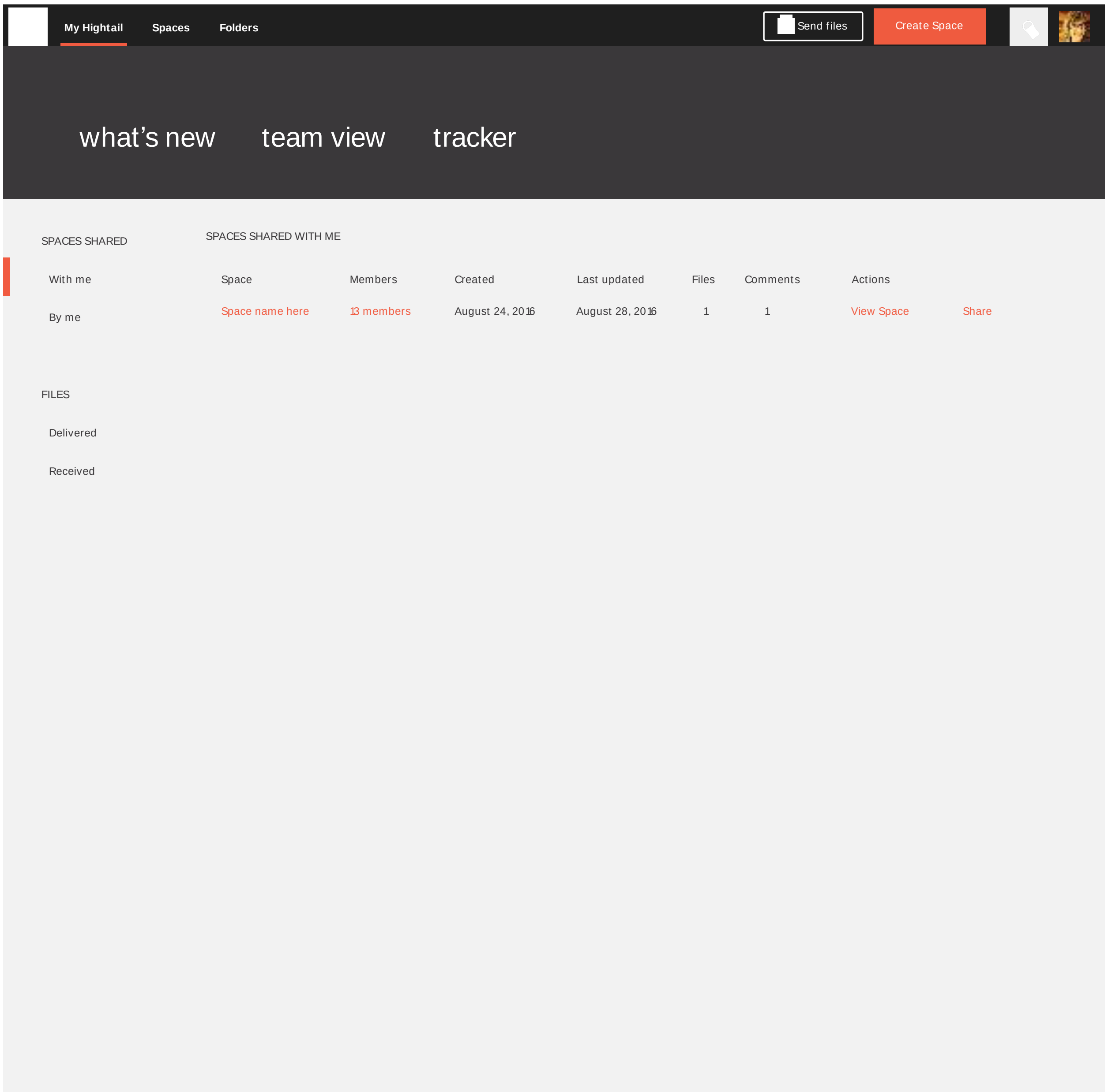
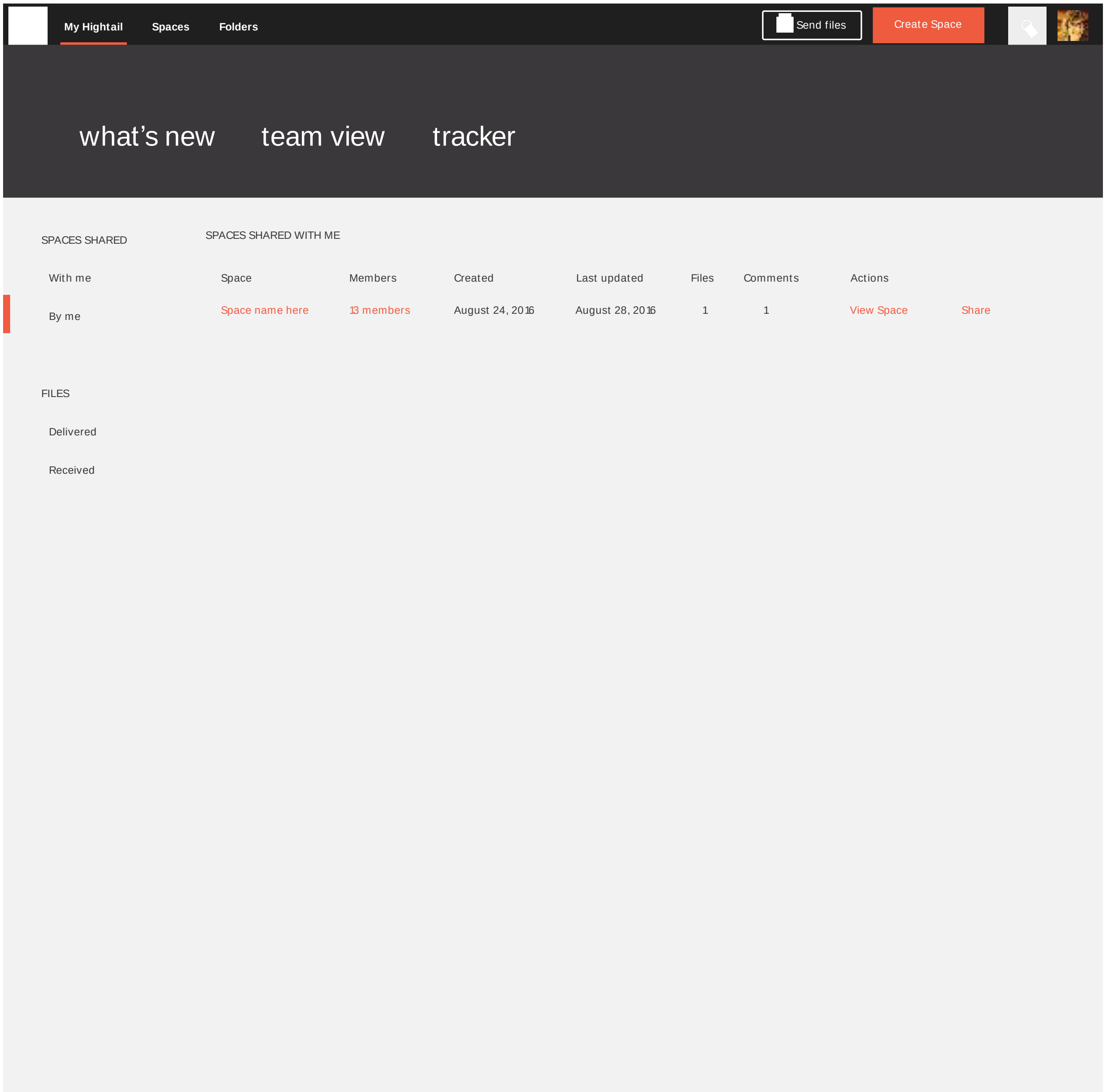
Members of your team will need to have Admin access to create teams.



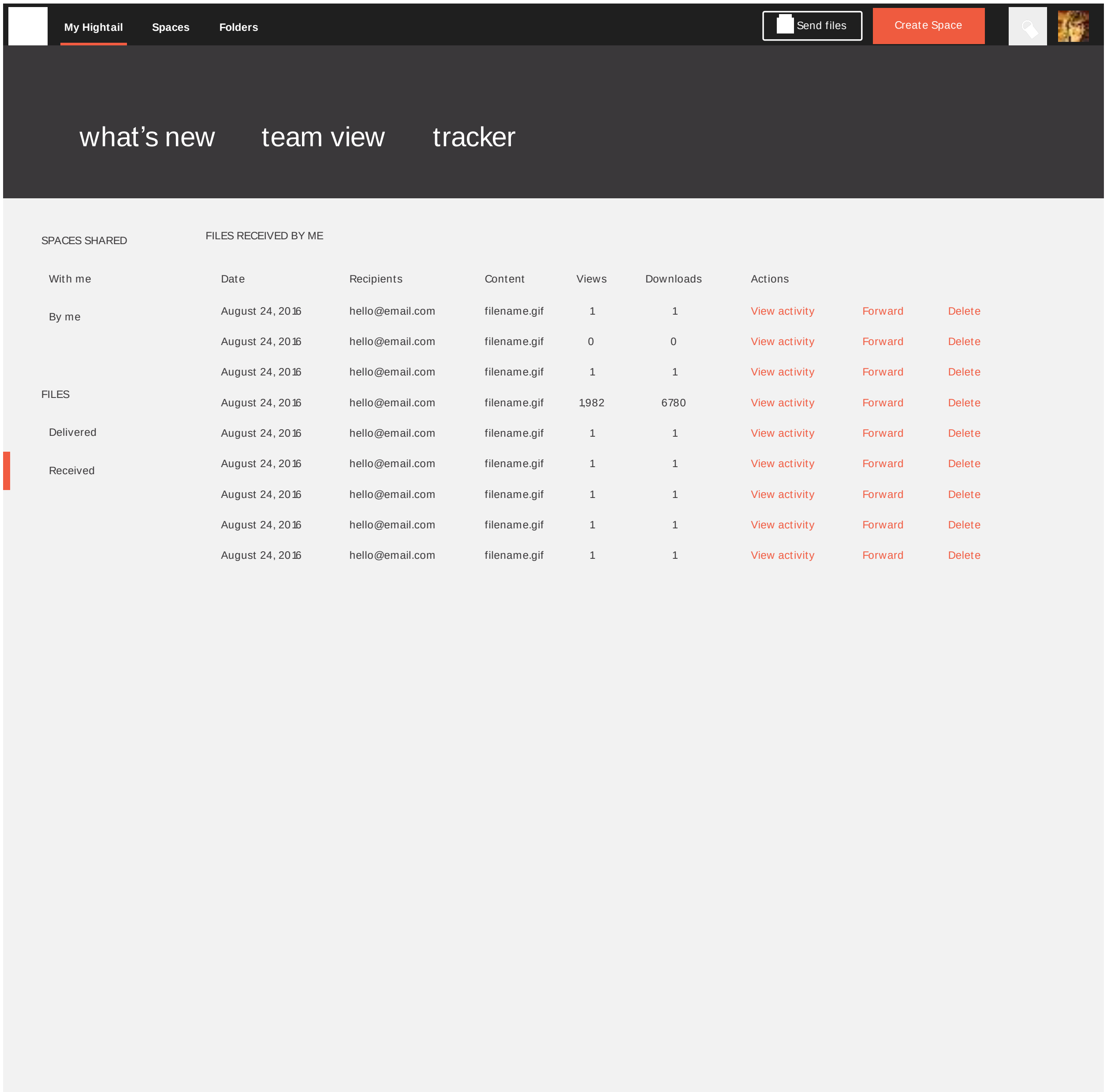
Tracker

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.

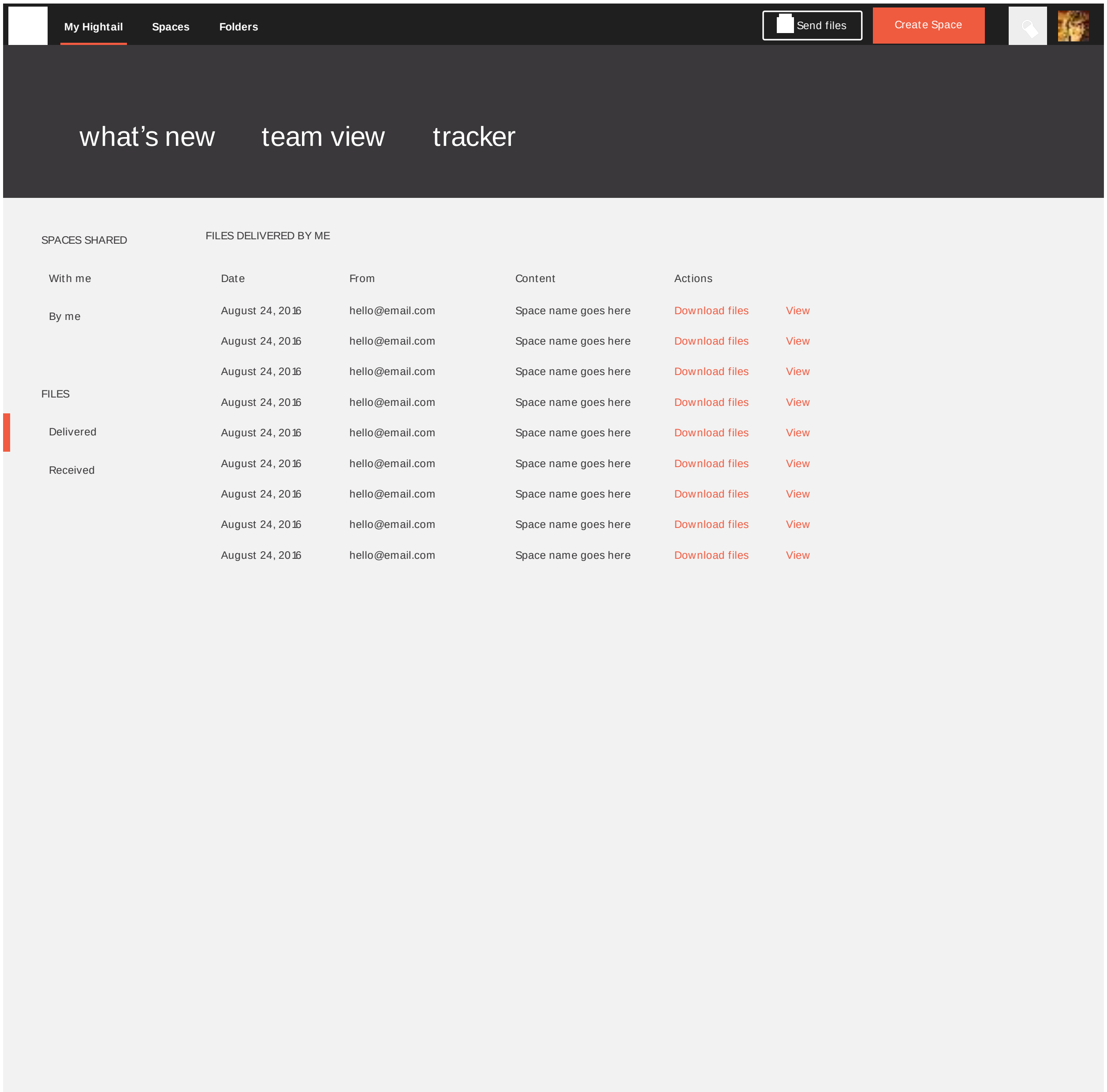



My Hightail
Spaces
Folders
Send files
Create Space
what’s new
team view
tracker
SPACES SHARED
With me
By me
FILES
Delivered
Received
SPACES SHARED WITH ME
Space
Members
Created
Last updated
Files
Comments
Actions
Space name here
13 members
August 24, 2016
August 28, 2016
1
1
View Space
Share

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



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.



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