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Hightail Administrator Guide

This technical guide offers step-by-step instructions for administrators on how to set up your Hightail Business account.

Welcome to Hightail

Thank you or choosing Hightail to power your organization's secure file sharing and collaboration. This admin guide will help you quickly get your organization set up with your Business account. We'll cover everything that a Hightail administrator is responsible for, including how to add members and assign roles, establish organization-wide security-sharing permissions, set branding and build user activity reports.

If you or your end users have any questions while getting started, we have a customer support team dedicated to organizations on the Hightail for Business plan. Additionally, our Knowledge Base is available 24/7 for on demand access to your frequently asked questions.

-The Hightail Team

Contents

Member management	4
Inviting users	4
Assigning roles	5
Disabling users	6
Transferring Space ownership	6
Organization settings	7
Space permissions	7
Send permissions	8
Third-party connections	9
Account security	9
Branding	10
Uplink	10
Reporting	11
Activity tracker	11
Usage reports	12
Support	13

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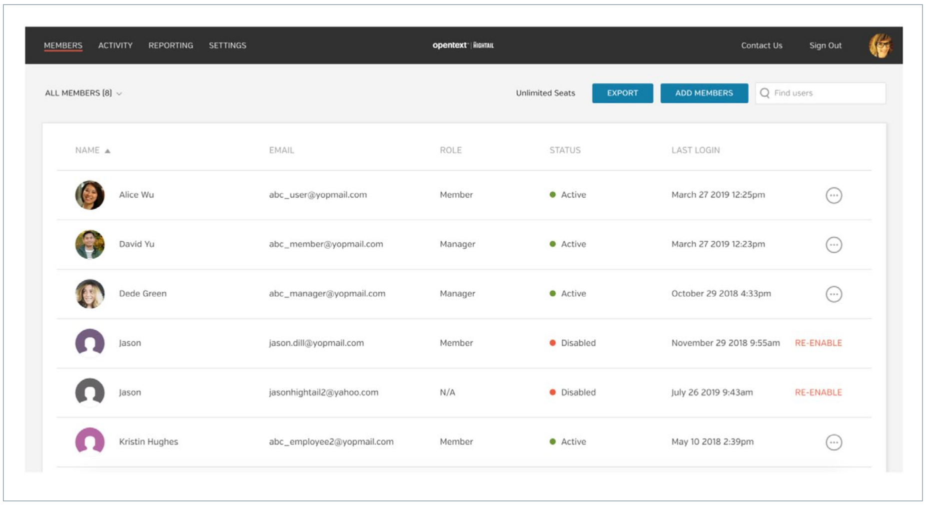
Member management

Through your Hightail Administrator account, you can easily manage your organization's Hightail users.

To get started, click your avatar in the top right-hand corner of the Hightail web application to access your profile and account information. Click on the button labeled **View Admin Console**. You can also access the Hightail Admin Console members page by visiting spaces.hightail.com/admin/members while logged into your Hightail account. The Admin Console is where you are able to add members, manage members, view the status of each of your members and confirm the total number of remaining seats available in your organization account.

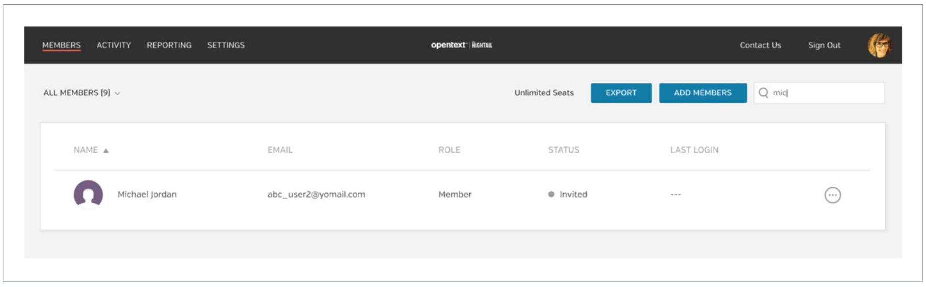


From the Admin Console, you can also export a complete .csv file of all of your members and search for members in the **Find Users** field.

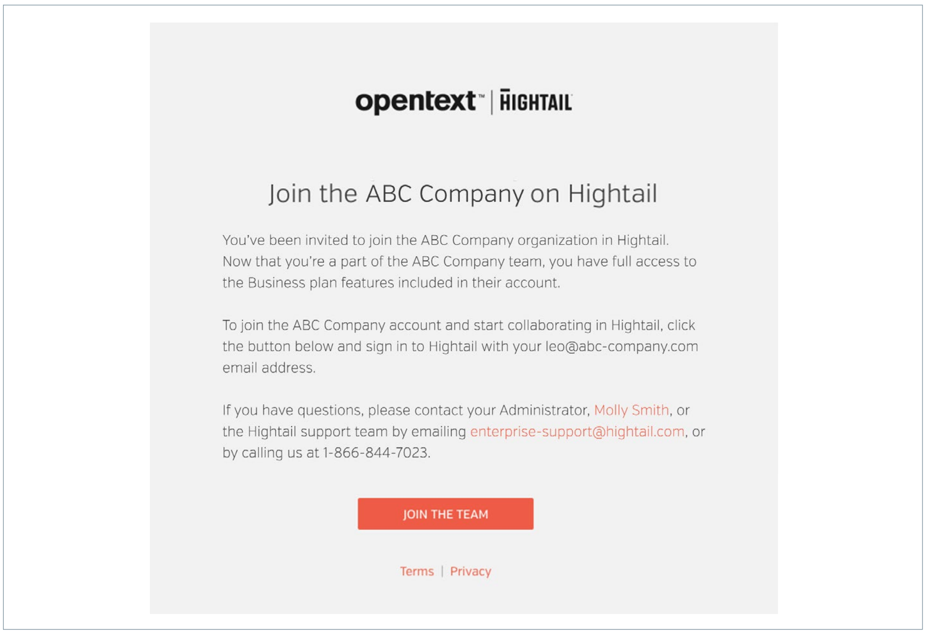
Inviting users

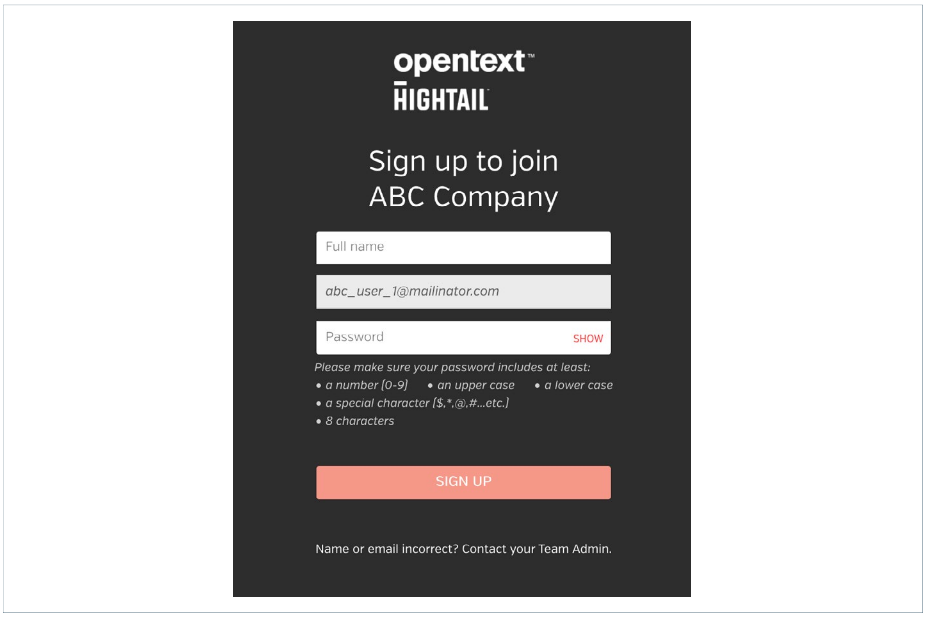
To add members to your organization, click on the **Add Members** button. You can manually invite each user or import a .csv file to invite a group of users. The format for the .csv file is two columns (Full Name, Email) with no header.

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



The member will receive an email invitation to set up their Hightail account.



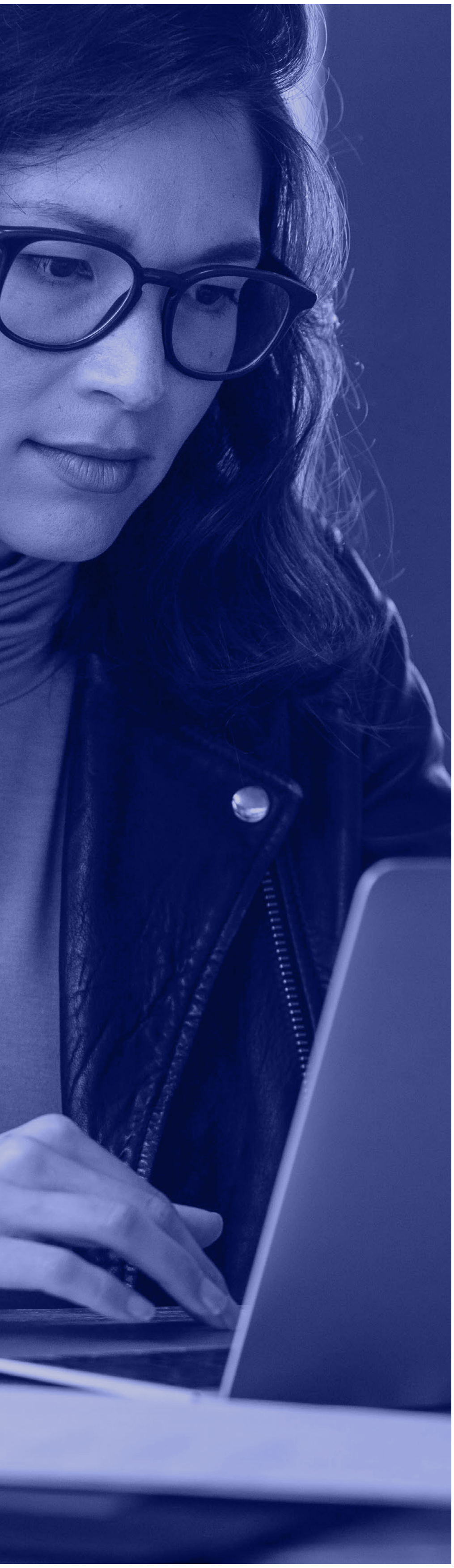


Once the member accepts the invitation, they will enter their name and establish a password to complete sign-up for their account. The member will now appear in the Admin Console as active.

Assigning roles

By default all newly added users of your account will have the "Member" role.

To edit the role of each user, simply click the menu button inline with the selected user, then select **Edit**. You'll now see an arrow inline with each user in the Role column. Select the appropriate role(s) for each user. Be sure to click the green checkmark once you're done assigning roles. This will save your new role assignments.



There are four different roles within Hightail:

Administrator – All Admins have the same rights and permissions as the Primary Admin, including access to the Admin Console with the ability to manage users, run usage reports and set policies that are outlined in the Settings section.

Space Manager – Can access any Space created by your Business account users. Access to all Spaces within the organization grants the Space Manager access to edit the content, sharing permissions, tasks and approval requests within each Space.

Team Manager – Can access the "Team View," which allows them to configure a dashboard to view multiple users' progress, including their to-do's, follow ups and approvals.

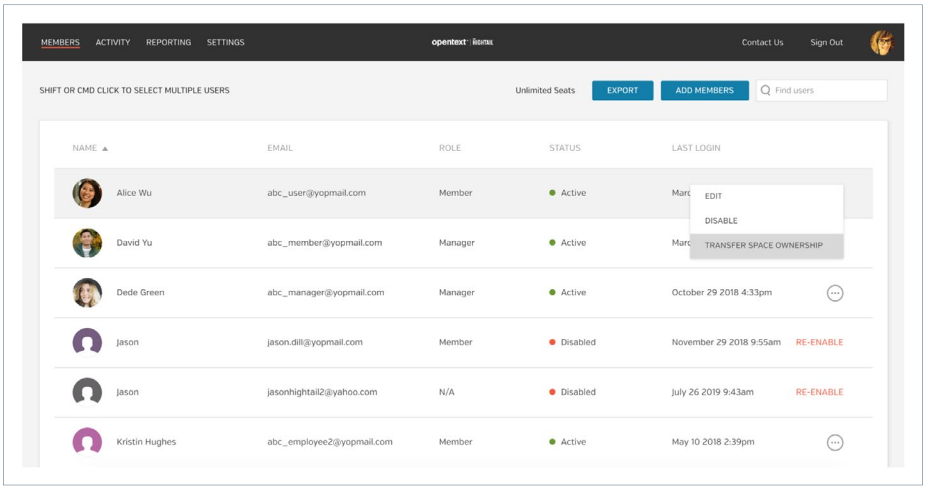
Member – Has full access to all file sharing and collaboration functionality, but does not have any privileges of the Administrator, Space Manager or Team Manager. This is the default setting for all newly created users on your account.

Disabling users

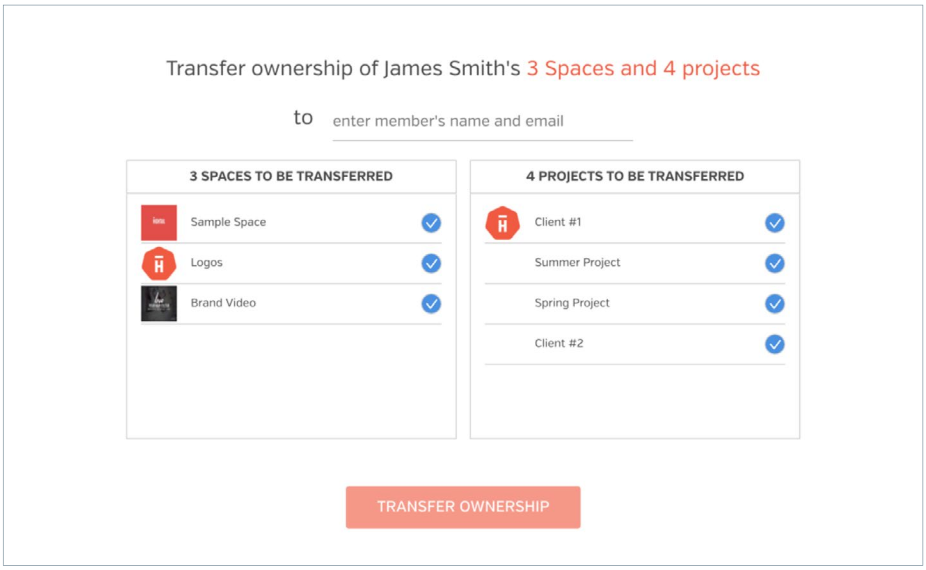
If you need to disable a member, select the menu button inline with the selected user and choose **Disable**. A message will appear to confirm that you want to disable that member. A disabled member will appear on your member's list as disabled in red under the status column. You may re-enable the user at any time. Disabled users do not count towards your total license allotment.

Transferring Space ownership

As an administrator, you can transfer ownership of all Spaces and Projects owned by a particular user to a different user. On the Members page, click the menu option to the far right of the name of the user whose Spaces you want to transfer.



Then choose who you want the new owner to be. You have the option of transferring ownership of all Spaces and Projects, or only selecting specific ones.



Organization settings

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

From the Settings tab in your Admin Console, you can set permissions for all users in your account. Note, these permissions cannot be overridden by end users.

Space permissions

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

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

Access code complexities – Requires that all access codes meet specific complexity standards.

Downloads restricted – 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.

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

Public Spaces allowed – Allows Spaces to be configured as publicly accessible, meaning they do not require login to access. If a Space is made public, it can be accessed by anyone who has the URL. If set to NO, all Spaces will be private and require login from users with whom they are shared.

Default Space permission – If public Spaces are allowed, this allows you to choose which default setting all newly created Spaces will have.

Approval restart after versioning – After a file is versioned, any approval request on the file will automatically restart with the same approvers. If this setting is turned off, versioning a file will erase the prior approval request.

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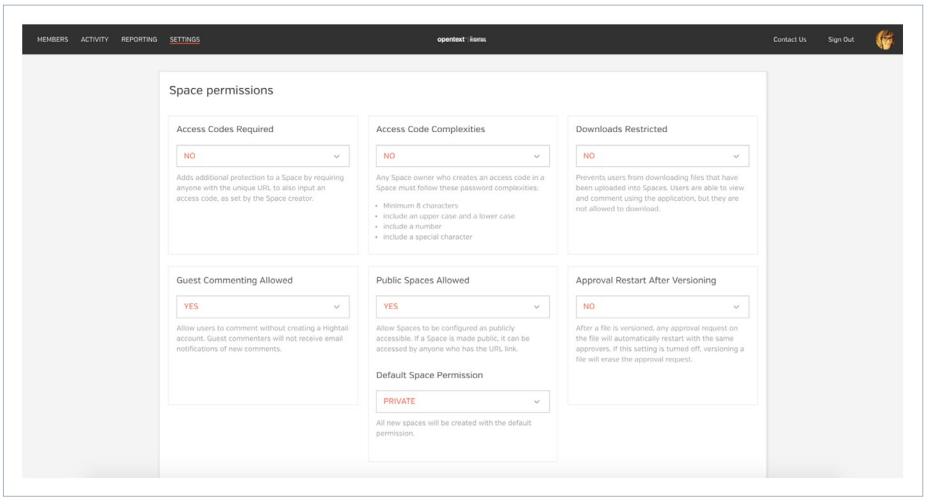


Send permissions

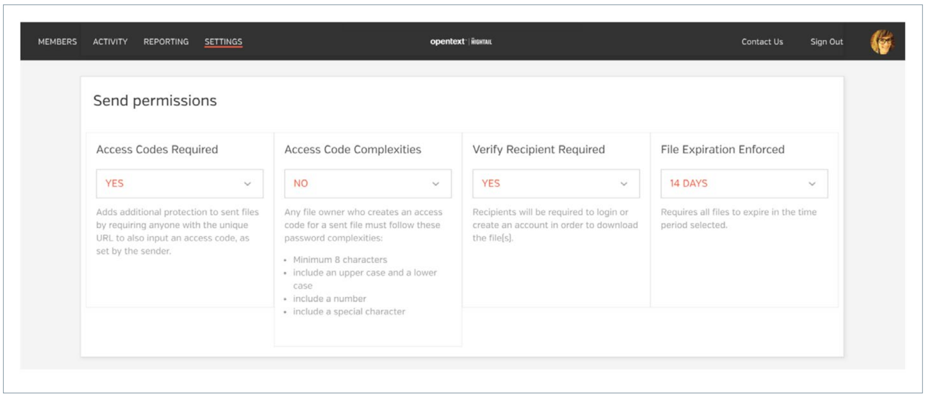
There are four Send permissions available that you can apply to all members' Send capabilities.

Access codes required – Adds protection to sent files by requiring anyone with the unique URL to also input an access code as set by the sender.

Access code complexities – Requires that all access codes meet specific complexity standards.

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

File expiration enforced – Requires all files to expire in the time period selected.

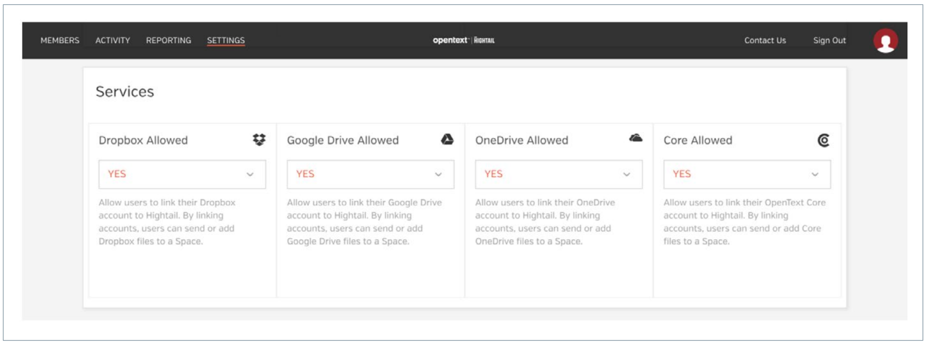


Third-party connections

Hightail gives users the ability to link to other third-party services so that they can send or add files from these other select file storage services. The services Hightail can link to are:

- Dropbox™
- Google Drive™
- Microsoft® OneDrive®
- OpenText™ Core Share

As an administrator, you have the ability to disable these third-party connectors so users will not see these options.

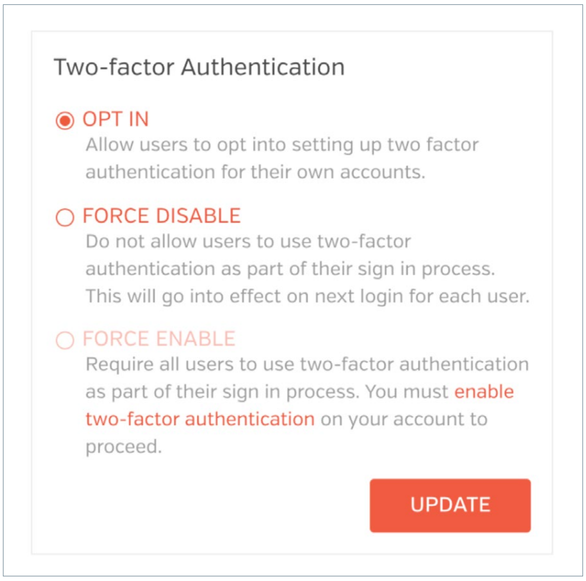


Account security

For an added layer of security, Hightail provides **two-factor authentication (2FA)** login capabilities for all users. As a Hightail admin you can:

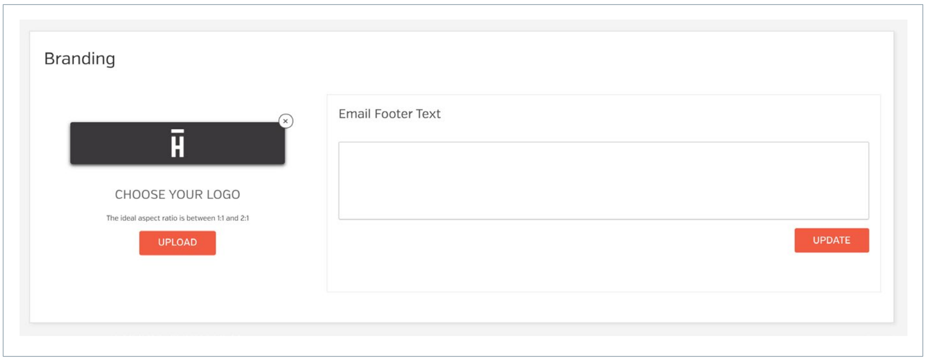
- Require all users on your account to use 2FA whenever they log in,
- Disable 2FA for all users, or
- Allow users to individually choose if they want to use 2FA.

Please note, 2FA is not available for customers using SAML/SSO.



Branding

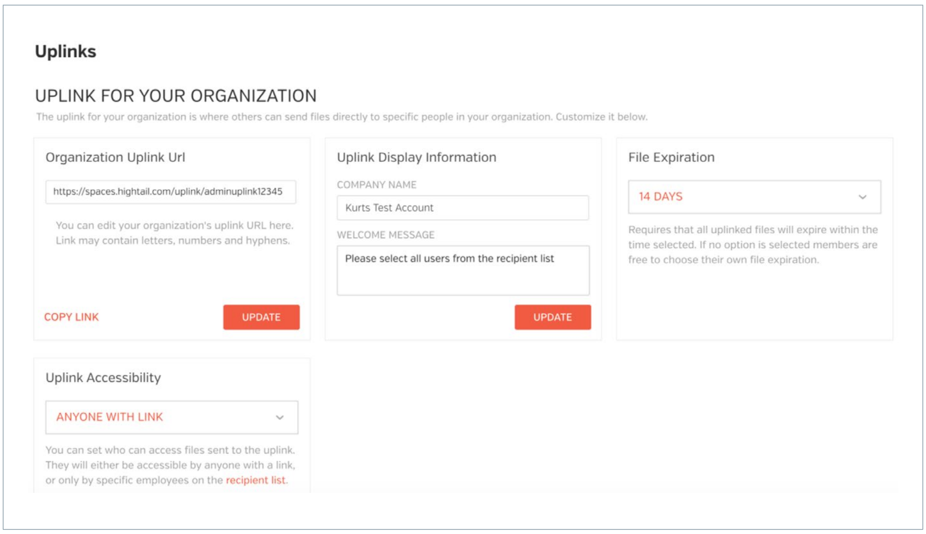
Choose your logo to brand your Hightail account. The ideal logo size is 128x128 pixels. Enter specific text into the **Email Footer Text** section to customize your Hightail- generated email notifications.



Uplink

Uplink is a personalized link that allows anyone to send files directly to specific 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 who are eligible to receive files through your organization's Uplink.

You can also choose how long files sent through Uplink are available for download before they expire. Under **Uplink Accessibility** you can choose if the download links can be shared with other users who were not eligible recipients of your organization Uplink.



All of your users are also able to create their own personal Uplink. You can select the Uplink settings (File Expiration and Uplink Accessibility) to apply to their personal Uplinks, or users can set their own File Expiration and Uplink Accessibility options.

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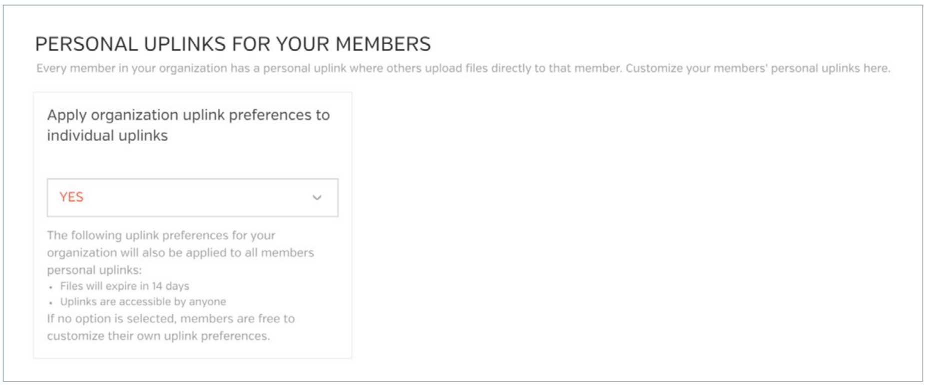


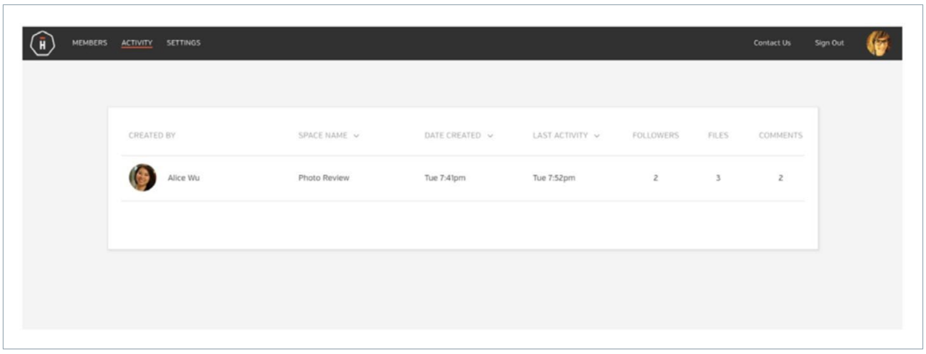
Reporting

With Reporting, you can see how your users are using Hightail. There are two areas within the Admin Console to track organization usage.

Activity tracker

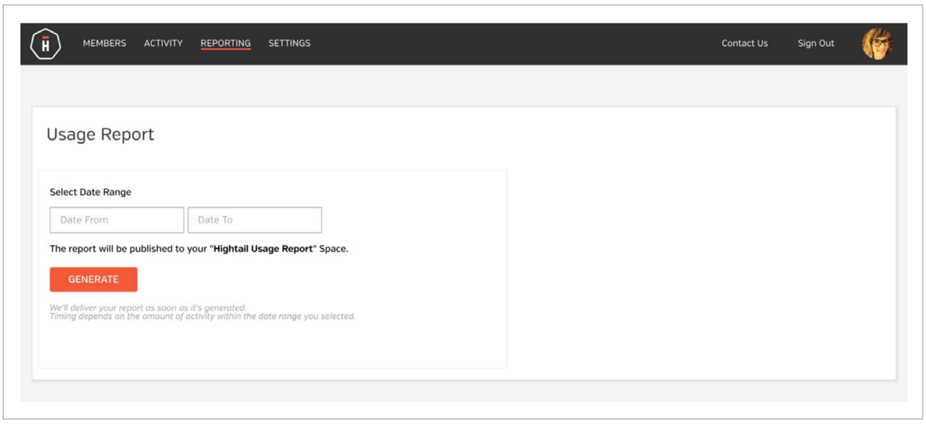
The Activity tracker allows you to view your members' Space activity. You will see an Activity tab next to the Members tab when you open your Admin panel.

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.

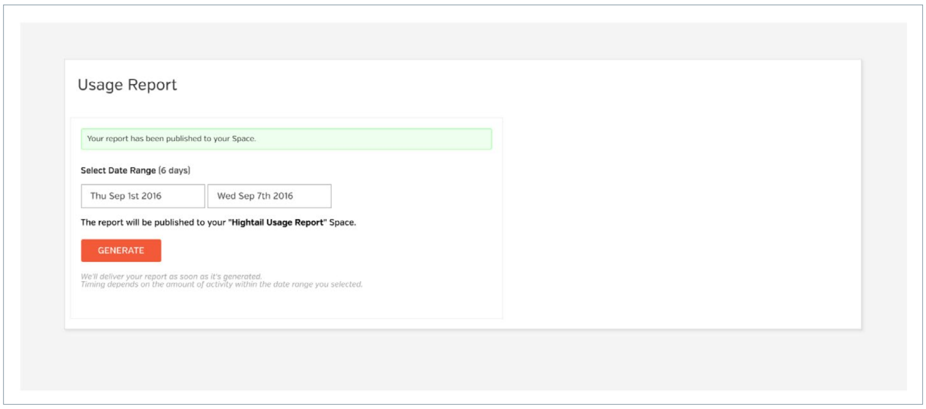


Usage reports

To access usage reports, start by logging into your account and clicking **Admin Console> Reporting**, or by visiting https://spaces.hightail.com/admin/reporting while logged into your Hightail account. To generate a usage report, 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.



Support

The Hightail customer support team is available by phone Monday-Friday from 7:00 am-4:00 pm PT, by chat Monday-Friday from 2:00 am-8:00 pm PT and by email 24/7. You can also refer to the Hightail Knowledge Base for frequently asked questions and troubleshooting.

Enterprise Support: 1 (866) 844-7023

Email: enterprise-support@hightail.com

Knowledge Base: https://hightail.zendesk.com/hc/en-us

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