

SENDING AND RECEIVING LARGE FILES WITH CAZARIN INTERACTIVE



1 OVERVIEW

Cazarin enables you to send and receive files that are too large for email. It provides fast, reliable, and secure online file transfer capability.

Note: All uploaded files automatically get moved to the Recycle Bin 30 days after they are uploaded (where they can no longer be accessed by links). **7 days after being moved to the Recycle Bin, files are permanently deleted, and cannot be recovered.**

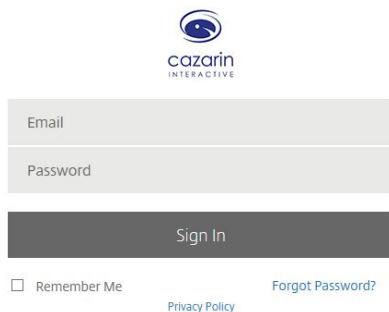
LOGIN

You can access Cazarin from anywhere. To access ShareFile:

1. Open your internet browser and type cazarin.sharefile.com in the address bar.

TIP: Add this page to My Favorites for future reference.

The login page appears.

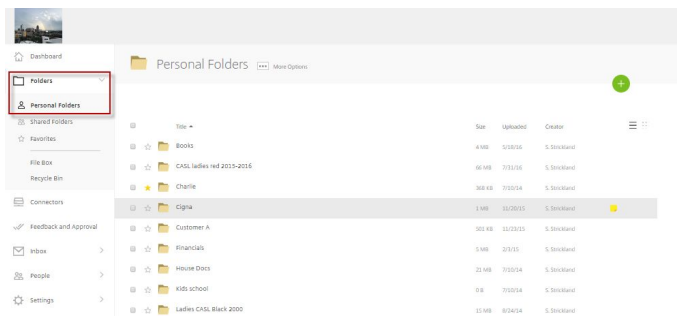


The **Employee Login** is for licensed users with more features to share documents.

The **Client Login** is for external users with limited features to upload and download only.

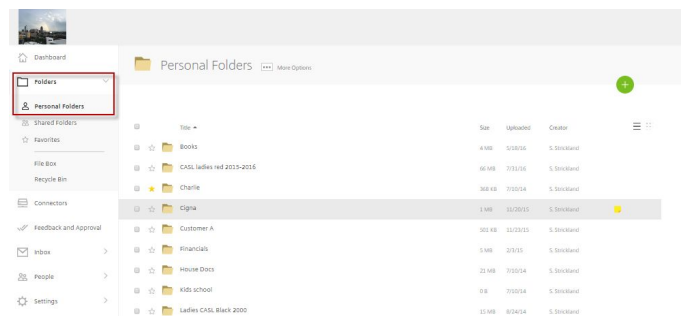
2. Click **Log in**.

The Home View will display after log in. Options for how to manage files will be blank until one is selected.



Navigation

Personal Folders is the root folder of your account.



- As more subfolders are created the structure will be displayed as shown above. Click on each link to navigate the structure

The current folder is displayed above the black bar and its contents are below the bar.

- Click on a folder to view its contents.

Best Practices

- Create and use folders to organize your documents.
- Do not place files in the root folder.
- Upload files immediately before sending them, to allow the maximum (30 days) time for downloading.

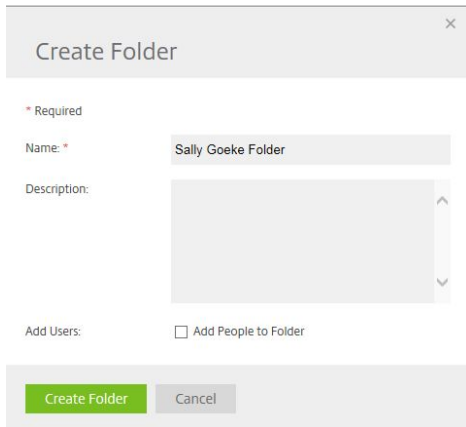
UPLOAD AND SEND FILE(S)

Create a folder to organize your files, upload the file(s) and send email notification to recipients so they can download the file(s).

To upload files:

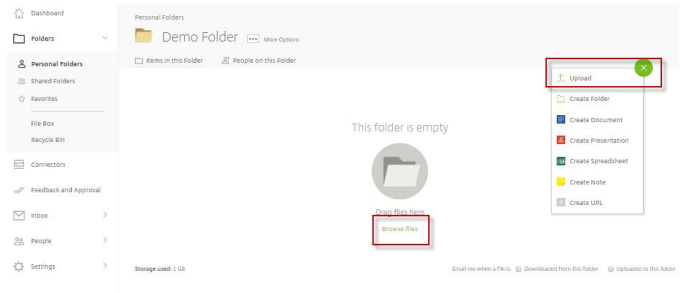
1. On your PC, save the files to a local drive.
2. Click **Create Folder**.

The Create Folder window appears.



3. Give the folder a descriptive name (e.g. matter name). Optionally add a description.
4. Click **Create Folder**.

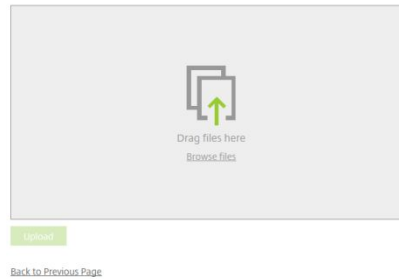
The new folder creates and opens.



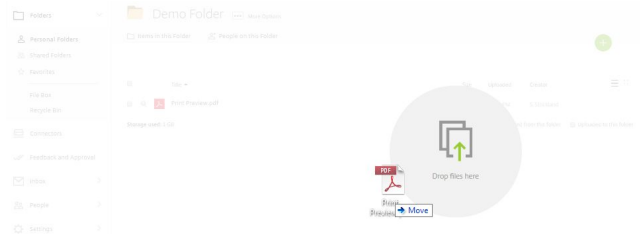
5. You can begin dragging one or more files into the window to upload them by clicking on **browse files** to upload files.

Upload Files to "sally" Folder

Note: To upload a folder, switch to [Java Uploader](#)



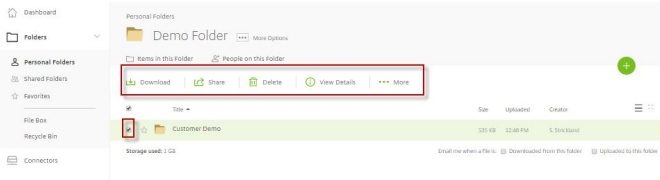
You can also simply drag one or more files into the window to upload them.



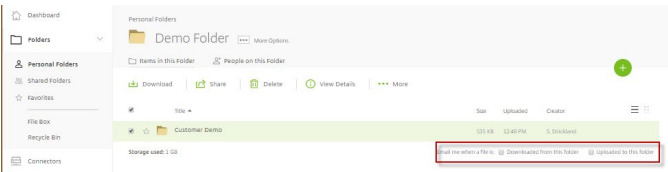
The files appear in the new folder. There are no options until you select a file or folder



Once you select the file you want to work on then the options appear



Note: You can select to receive an email when a file is downloaded as a default property of the folder



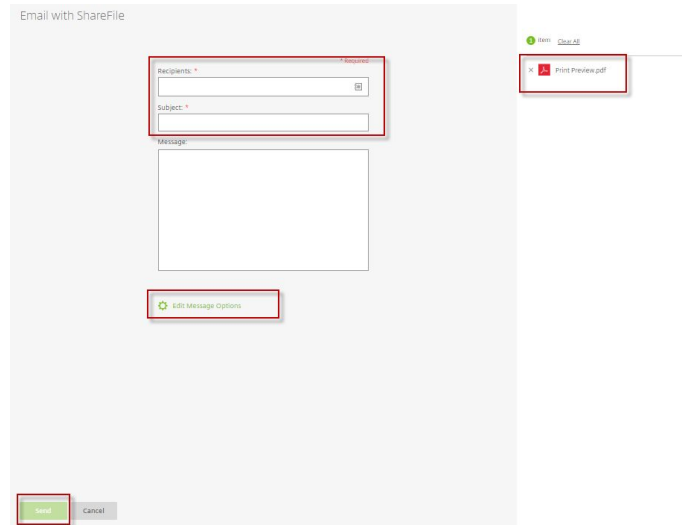
To send a Cazarin link (“Send” files):

6. Check the boxes next to the files or folders you wish to send a link to (or the top box for all).



7. Click **Share** → **Email with ShareFile** from the menu below the blue line

An email recipient dialog box displays.



8. Fill out the email form:
 - a. Enter one or more email addresses in the **TO:** field.
 - b. Type a **SUBJECT**.
 - c. Optionally enter a message (e.g. “Please download these files at your earliest convenience”). Optionally check the box to remember the subject and custom message for future use.
 - d. Optionally click on **Edit Message Options** to receive a copy of the email, get notified when files are downloaded, or change security.

Note: By default, you will be notified whenever the recipient(s) use the link. By default, the link will expire when the linked file with the shortest remaining life (30 days minus the number of days since it was uploaded) is sent to the Recycle Bin. To get the full 30 days, remember to send links to files immediately after uploading them.

9. Click **Send** to send the link.

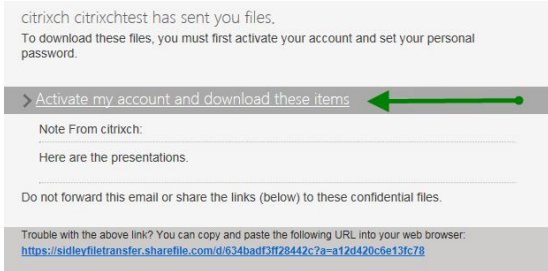
Items sent successfully appear on the screen.


WHAT THE RECIPIENT RECEIVES WHEN SENT FILES

Cazarin’s security best practices requires recipients to log in. The first time recipients receive an email with a

link to retrieve the files, they will need to activate their account.

1. First-time recipients get the **Activate my account message**, thereafter **click to download** displays.



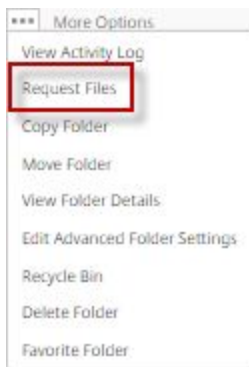
2. First-time recipients will need to create a password, enter some personal information, and click **Save** to log in.
3. Once the login and password have been entered, recipients click .
4. For a single file, they click **Save** or **Open**. Multiple files are downloaded as a single zipped file called **Files.zip**.

REQUESTING FILES

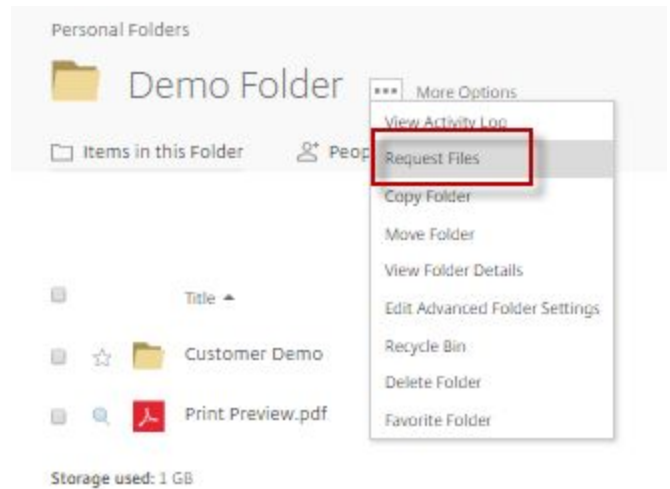
In order to receive files from outside parties or Cazarin personnel, you will need to create a folder and request the files.

To Request Files:

1. Create a new folder or navigate to an existing one.
2. On the left side of the Home screen, expand **More Options** and select **Request with ShareFile**.

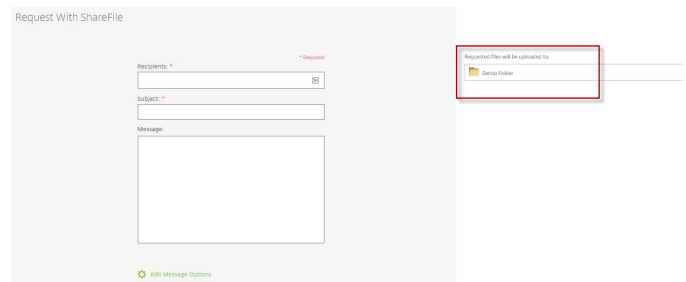


Or, from the Folder Options, select **Request with ShareFile**



3. Click **Request Files**.

The Request Files dialog box displays.



4. Fill out the email form to request files from the client into the specified directory and click on **Send**. You will be notified when a file is uploaded by default
 - a. Optionally check the box to receive a copy of the email.
 - b. Select a time period for **Upload access expires**. *The recipients will be able to upload as often as needed for this period of time, after which they will be denied access.*

WHAT THE RECIPIENT RECEIVES WHEN REQUESTED TO SEND FILES

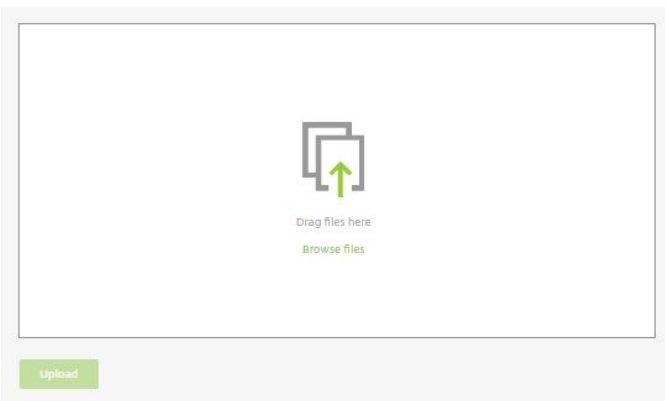
Recipients will receive an incoming email message with a link to the Cazarin storage location.



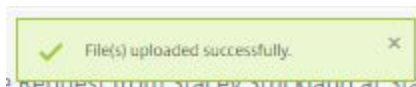
ShareFile is a tool for sending, receiving, and organizing your business files online. It can be used as a password-protected area for sharing information with clients and partners, and it's an easy way to send files that are too large to e-mail.

Powered By Citrix ShareFile 2016

1. The sender clicks the link in the email and an upload screen opens in the browser.



2. The sender may drag files to the window, or click **browse Files** to open a standard Windows file selector.
3. The sender clicks **Upload Files**.



An acknowledgement displays when complete. A confirmation email is sent to the recipient and an email notification is sent to the account owner.

DOWNLOADING RECEIVED FILES

1. The account holder receives email notification in Outlook when requested files have been uploaded.
2. To download the files you have received, check the **Download These Items** box in your email.

