

# Users Guide June 2013



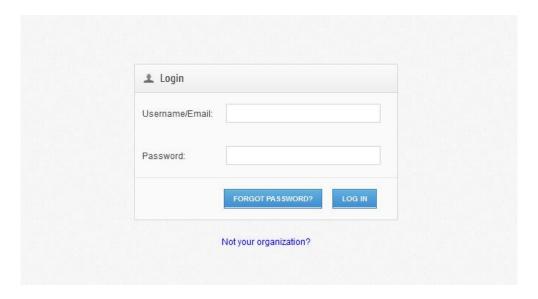
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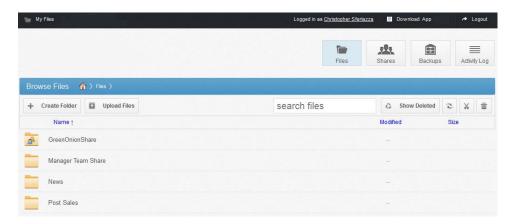
#### Welcome to Store and Share from The Kotter Group

## **Getting Started**

By now you should have received an email from us or your administrator with your account information. This will include your username and password. The password can be changed by you after you have logged in. To get started, first go to <a href="http://ss.kotter.net">http://ss.kotter.net</a> and login with that account information.



Great! Now you should be logged in. You will see your personal dashboard where you can upload, download, share, and collaborate on files.





## **Adding Files to Your Account**

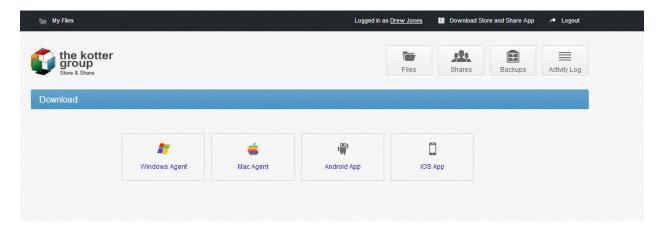
Adding files is as simple as dragging and dropping files to the sync folder on your desktop. First you will need to download the desktop app.

On the top right of the dashboard you will find a link to "Download App". This is where you will click to install the agent for offline file access.





Once you click "Download App" it will redirect you to a page to either download *Windows, Mac, iOS,* and *Android* apps.



Choose the appropriate OS (Operating System) and follow the installation instructions to install on your local machine or device. After you finish installation it will ask for your credentials to log in. The advanced option will allow you to choose where you want to sync file to be located. Otherwise, choose default option.



One of the main values of a file sync solution is being able to access files from all devices. So not only will you have your files in the cloud, but on local machines and mobile devices as well.

Using the app is the easiest way to store and share your documents. We recommend using the desktop app over launching the browser version just on reason of simplicity.

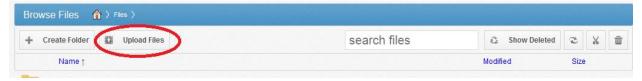
# Here is how the desktop app makes it easy:



- Drag and drop files they are automatically synced to your cloud account and backed up.
- Sync drive can be used just like "my documents".
- Folders can be added and deleted. It can hold pictures, documents, etc.
- Easy sharing right click and send file without having to even open your email.
- Email large files directly from your Sync drive.
- Easily manage shared files with other team members.
- Every time you save a file, a version of it is saved in case you need to go back.

Another way of adding files to the cloud is through the Web User Interface on ss.kotter.net

To upload a file, navigate to the "Upload Files" button on the top left of your screen.

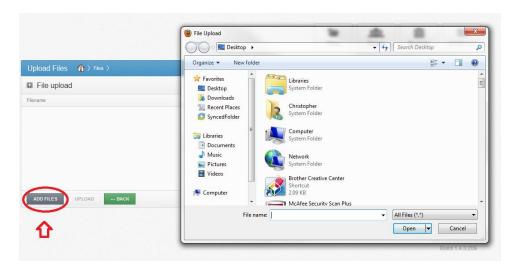


Once "Upload Files" is clicked it will redirect to a new page where you can drag and drop files to sync up to the cloud.





An alternate way to upload is to click "Add Files" and search for files manually on your machine.



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# **Accessing your Uploaded Files**

Your Files can be accessed through the Kotter Store and Share icon on your desktop. You can add or delete files inside the app by opening the icon and dragging, dropping or deleting.



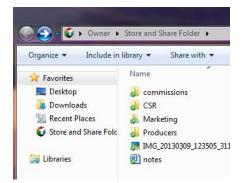
If the icon does not launch your sync folder, you may access it through the system tray located on the bottom right of your screen.



Click on the upwards arrow and select the Kotter Store and Share icon. Select "open store and share folder".

Once files are done syncing down to the local machine, they will change to a green checkmark as seen below.

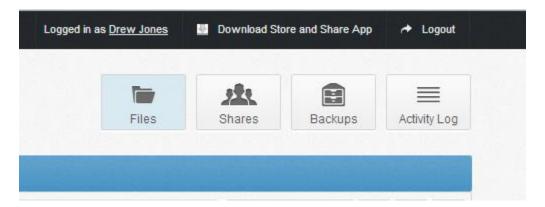




#### To View Files in a Web Browser:

Sometimes you may be on a remote computer and you just need a quick look at your files. This is easy to do from any web browser.

To see the files that you have uploaded, go to <a href="http://ss.kotter.net">http://ss.kotter.net</a> and login as usual. Once logged in select the files option in the top left. There you can view, share and download the files that are in your account. You can view your files on any computer with an internet connection.



#### **How To Share Your Documents With Others**

Sharing your stored documents is very simple. You can share with anyone, even if they do not have a Store and Share account. You can share from your Downloaded Sync Folder (Store and Share App) or through the web browser on your account interface on ss.kotter.net.

You can also share through a team-share. Team-shares are used to share a folder with a specific group of users. The administrator can create these shares for your team.



## How do I send my files to a customer?

To share any documents from your Desktop App, go to the file you wish to share and right click. From the menu that opens, mouse over the Store and Share icon. To the right you will be given two options: view revisions and share. Select "share link". A web browser will launch where you can input the email address you want to send the link to. The one who receives the file will see it coming from your regular email address. You can verify they received the email and even choose to have the link expire.

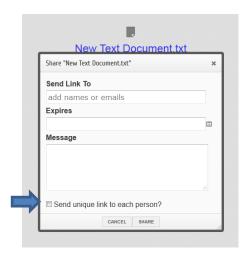
You can also send files from the web interface on http://ss.kotter.net

## **How Do I Send Large PDF's or other Files?**

The Advantage of using Store and Share is that you can easily send any size attachment. Sending a PDF or other attachment works the same way as the step explained above.

# How do I know my client received my file?

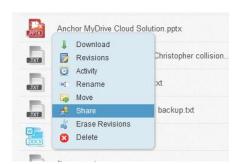
When the window opens to enter the email address where you want your file to go, there is a box that you select at the bottom that says "send unique link to each person". That will enable you to verify that your recipient opened and viewed your file. Since you can send a file to multiple email addresses, you can see who all opened your document. You can also set that link to expire in hours, days, or weeks for the protection of your customer's sensitive information.



#### **Share files from Web User Interface**

To share a file with an individual or group is simple. Just right click on any file or folder and click Share.





When you click share it will redirect to a form. Fill out all email addresses to share the file with. You can add an expiration date for the share to expire. Once the share expires the link will no longer be available. We also allow you to add a message if needed. If "Send unique link to each person?" is checked you will be able to track who opens and downloads the file.



After the "Share" button is clicked, a message will say, "Share links were sent successfully." You will be left on a page that gives an option to download the file to your local machine, remove the share, go to your files, or track your shares.





## **How Do I Share With Just My Team?**

As we discussed earlier, Team-shares are used for team collaboration. These are different than personal folders. A team-share folder will have an icon with people on it. You know a folder is a team-share when this icon is visible. Anytime you change a file in this folder it will then update across everyone's devices that are attached to that share. This allows collaboration in real time. You will also be able to access older versions of files which are called "revisions". This can be helpful if one team member accidentally deletes or changes a document.



# Why share files through Store and Share?

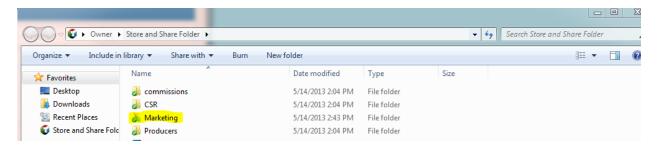


- Either in the app or on ss.kotter.net, right click feature allows you to email files directly.
- No need to open your email and download an attachment.
- Recipient sees it as coming from your email account. And if they reply it goes to your regular
   e-mail.
- See who opens the file and when they received it.
- Send to multiple recipients at once.

#### **How Do I Access my Team Shares?**

As long as you have permission, you can access your team-share from your sync folder. Same as the web user interface on ss.kotter.net, anytime you change a file it will propagate to all other devices and users associated with the share.





## **Tracking Your Shares**

You can track and view all of your team-shares and 3<sup>rd</sup> party shares. Just click on the "Shares" tab. On the top portion you will see your team-shares, and below your 3<sup>rd</sup> party shares. The shares tab is located on your profile at ss.kotter.net





#### **How Do I Delete A Team**

#### Share?

Only an administrator can delete a team-share. From the shares page you can browse your team-share files.

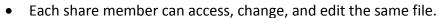


For 3<sup>rd</sup> party shares you can delete, track, and view your shares.



#### Why Use Team Share?





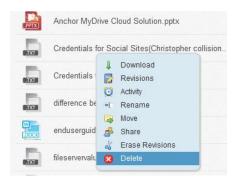
- Actions done by each share member is recorded.
- Keep files personal to you or share them to a share group.
- Multiple folders and files can be added to a share group.
- Easy collaboration on files
- Make multiple shares for CSRs, Producers, etc

#### **How Do I Delete A File From My Cloud Folders?**

Generally users aren't allowed to delete their own files unless they have permission. If you right click and press "Delete" the file will still be on the server.

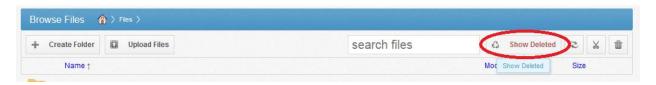






#### **How Do I Recover A Deleted Document?**

If you accidently deleted or need to find the file again it is easy to restore. On the top right of the screen next to the file search bar, you will find "Show Deleted".



After you click "Show Deleted", all deleted files will show up faded out.



#### How Do I look at a Previous Version of a Document?

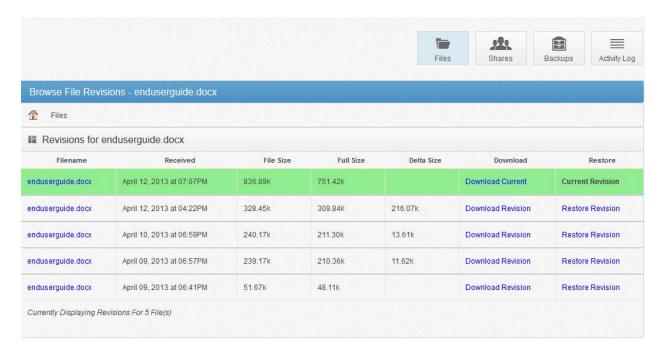
Revisions or versions of file changes are kept. You can go back to older versions of files very easily. From the web user interface right click on the file and click "Revisions".





#### How to Restore a Previous Version of a Document

Once you click "Revisions" it will redirect to a screen where you can download older versions or restore an older version to the current revision. The most current version will be highlighted in green.



#### **Benefits of revisions:**

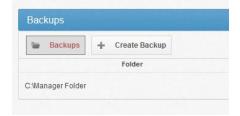


- Each time you re-save a document, a copy of the previous version is saved and stored.
- Any deleted file can be retrieved.
- Versioning saves what changed, thus reducing need for extra storage space.
- See past versions of any document with ease.

#### How Do I Backup Crucial Data Files On my Computer or Server?

As long as you have permission from your administrator, you can use the "Backups" tab. Backups are used if you have files on your local machine that you don't want to sync but still want a backup copy of. You can use our backup feature to choose folders or files which will sync to the server only. Any changes made to a document will also sync to the server. If you need to restore a backup, you can navigate to your "Backup" tab. Just find the file you need and click restore.





# **How Do I Create a Backup?**

On the web user interface on ss.kotter.net, Select the backup tab and click "create backup"



After you select "create backup", you will see your computer listed. To select a drive to backup, select the sideways triangle to the left.

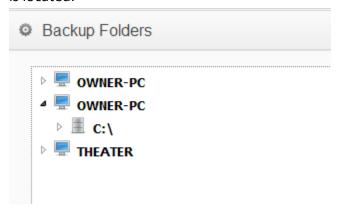




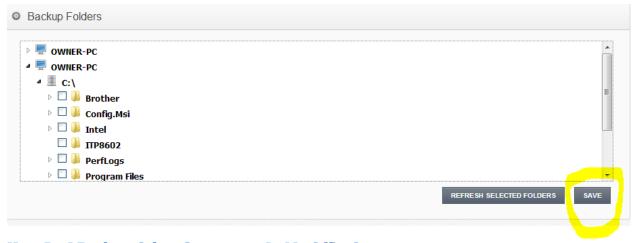
A dropdown should occur

showing your drives.

Select the same sideways triangle next to the drive where your folder that you want backed up is located.



Next open and locate the folder that you want backed up. Check the box and hit "save".



## How Do I Backup Other Computers In My Office?

To backup important data files on other computers, the Store and Share app will need to be downloaded to those computers first. Then you can go to the backups tab just like you did in the previous step and choose the folders to backup. Backups occur in real time as files are saved.

# **Benefits of using the Backup Feature:**



- Real time backup, as soon as you hit save on a document, it is backed up.
- Files available on demand as soon as you need them.
- Tell Store and Share what folders to backup.
- Create multiple backups of multiple folders.



## What is The Difference between Backups and your Store and Share Desktop App:

#### File Sync:

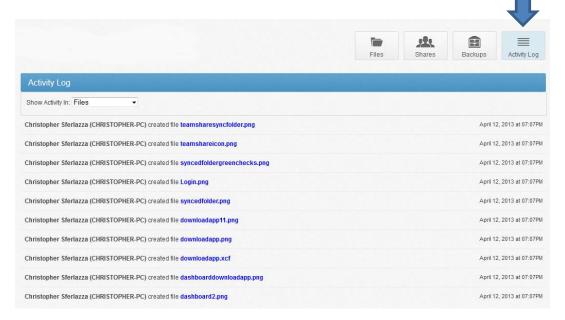
- File Sync allows remote file access from anywhere on all devices.
- Revisions (File versioning).

#### Backup:

- Backups are files that aren't in the "sync folder."
- Remotely backup files on your local machine.
- These files are saved on the server not in your "sync folder."
- Any time the file changes on the local machine it creates a revision on the server.
- You can restore backups from the Web UI under "Backups" tab.
- No file access remotely.

# How Do I view my Team's Activities? And who deleted what?

The activity log is used to track all usage across the system. You can see when you deleted a file, made a change, or any other activity. The activity log is located on the web user interface on ss.kotter.net





## Conclusion

**Anytime, Anywhere Access** - Accessing and syncing files between their devices – laptops, desktops, smartphones and tablets – is a priority for enterprise employees.

**Easy Collaboration: Externally & Internally –** The ability to share and collaborate on files with both internal and external constituents.

**Most importantly** - You are getting a cloud storage, sync and collaboration solution that is guaranteed by your service provider.