KITEWORKS

Accellion, Fragomen's secure file sharing solution has updated its platform and renamed it Kiteworks. Users migrating to Kiteworks will retain folders (formerly Workspaces in Accellion), but not emails.

Note: If you find that you do not have access or the ability to perform an activity listed in the following guide, you likely do not have the user role required for that activity.

1. How to Access Kiteworks (Desktop)
2. Install Kiteworks App on Apple Device (iPhone) or Android Device
3. Use the Kiteworks Mobile App

How to Access Kiteworks (Desktop)

Fragomen will send an email via Kiteworks to view files/folders. If accessing Kiteworks for the first time, you will need to create an account. Follow these steps to create an account:

1. Click *Access folder* / *Access files*.
2. Click *Create account*.

3. Enter Email and create/confirm Password.
4. Click *Create account*. You will receive an email to Activate your Kiteworks account.

5. Open email and click *Activate account*.

6. Sign in with Username and Password then accept Terms of service.

Account permissions will vary depending on the role assigned to you by the Fragomen Legal Team. The available roles include:

- **Viewer:** Can view files in Kiteworks.
- **Downloader:** Can view and download files.

   Note: In a Restricted Folder, Downloaders can only view using the Online Viewer.

- **Collaborator:** Can view, download, upload new versions, make comments and assign tasks.

   Note: In a Restricted Folder, Collaborators can view and edit files, upload new versions, make comments and assign tasks.

- **Manager:** Full access to all files within a folder and can control others access to a folder.

How to Manage Folders
Files can be stored in secure Folders and shared with other users for collaboration.

My Folder is available for all users with never expiring security settings and cannot be changed.

New folders can be created, or existing folders can be uploaded from your desktop and/or enterprise sources.

Create a Folder
The ability to create folders is based on user role and can only be done within a folder shared with the User.
1. Click *All Files > Kiteworks Files*.
2. Click *New*.
3. Select *Folder* from the drop-down.
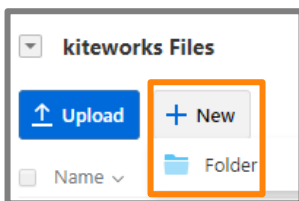
4. Type the **Name** and **Description**.
5. Click *Security settings* to view and/or set security options:

   o **Folder expiration:** Select date you want the folder to be deleted from Kiteworks server. Folder expiration can be set up to 90 days in the future.
   o **File expiration:** Select the date the files in the folder will be deleted from Kiteworks server. Leave blank to follow the folder expiration setting. File expiration value cannot be greater than the folder expiration value.

   Note: Folder and Files may be restored if deleted; contact Connect Support to request.

6. Click *Save*.

Create a Subfolder
To create a subfolder, follow steps 1-6 from the **Create a Folder** section.

Note: File expiration is the only security setting that can be set when creating a subfolder. All other security settings are inherited from the top-level folder and cannot be modified.
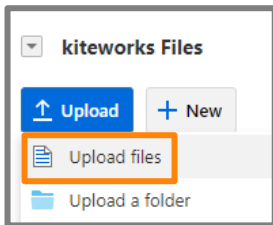
Upload Files
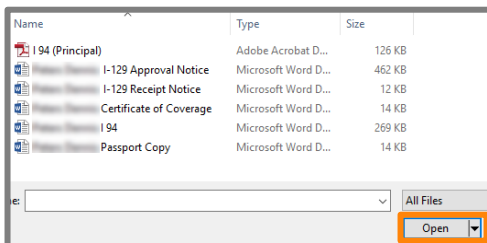1. Select the desired recipient folder from *All Files > Kiteworks Files*.

   Note: The more you use Kiteworks this step may not apply.

2. Click *Upload*.
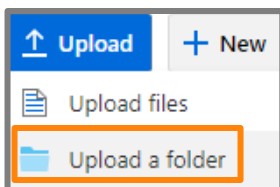3. Select *Upload Files*.

4. Choose the file(s) to be uploaded.
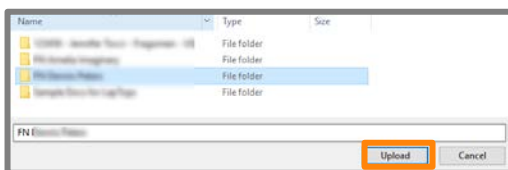5. Click *Open* to upload the file(s).

Upload Folder(s)
1. Select the desired recipient folder from **All Files > Kiteworks Files**.
2. Click *Upload*.
3. Select *Upload a folder*.

4. Choose the folder to be uploaded and click *Upload*.
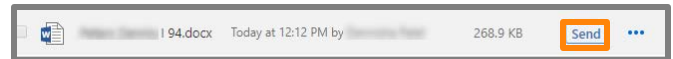5. Click *Upload* on the message window.

How to Send Files
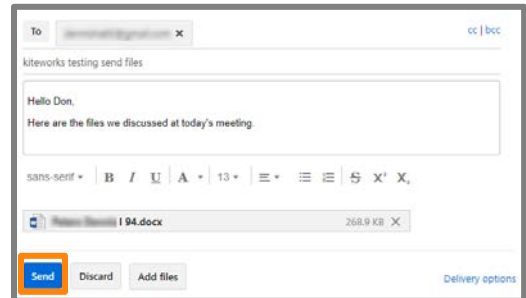Follow these steps to send files from Kiteworks:

Send a File
1. Hover on the file(s) and click *Send* to open the email message with the attached documents.

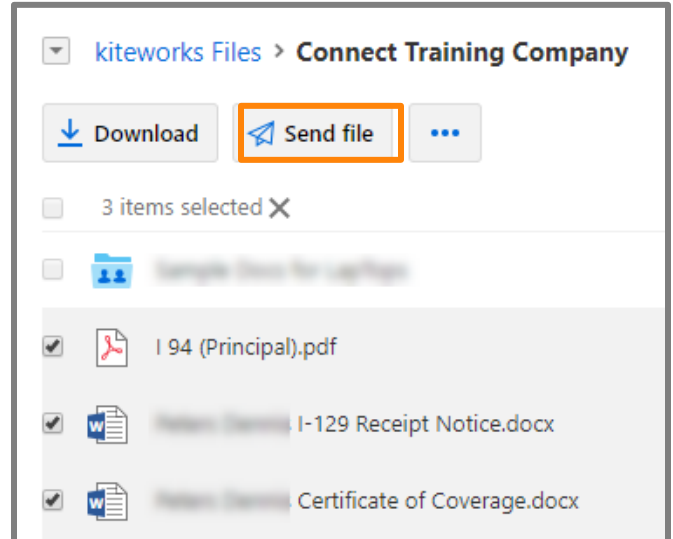

2. Complete the email.
3. **Optional:** Add/remove files and set Delivery options in the lower right corner of the email.
4. Click *Send*. The message will be saved in the **Sent** folder.

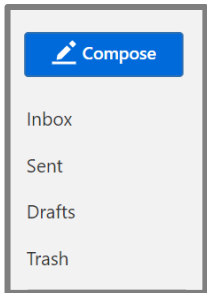**Note:** Click *Discard* to cancel the message

Send Multiple Files
1. Check the files to be sent.
2. Click *Send File* above the files.
3. Follow steps 2-4 from the **Send a File** section.

If a user does not have an account in Kiteworks, the system sends an email with instructions on how to create an account to access the files.

Compose an Email
1. Click *Compose*.

2. Set email properties (e.g., **To**, **Subject**, **Message**).
3. Include files in the email by:
   a. Drag and drop
   b. Select from the computer
   c. Select from Kiteworks.
4. Click **Send**. The message will be saved in the **Sent** folder.

   Note: Click **Discard** to cancel the message.
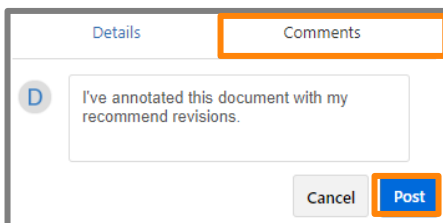
Additional File Options
Click **More** (▪▪▪) to the right of the **Send file** button to view and select file options.
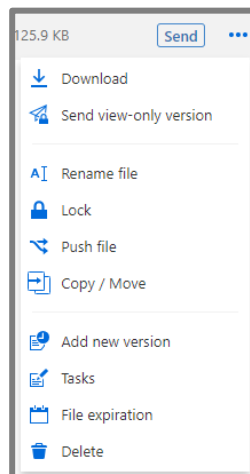
How to Add Comments to Files
To add comments to files, follow these steps:
1. Check the box next to the file.
2. Click **Comments**.
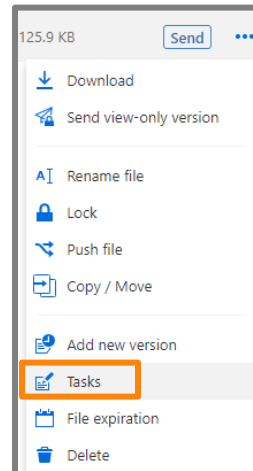3. Add a comment, then click **Post**.
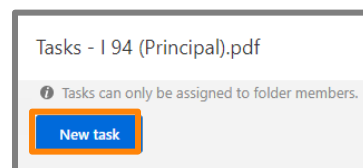

How to Work with Tasks
Tasks for files can be created and assigned to folder members. Task assignees will receive an email notification describing their task assignment and secure links to access the file(s) in Kiteworks.
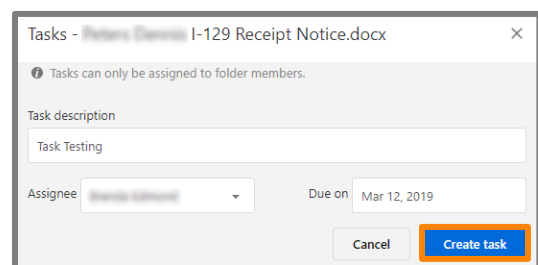
Follow these steps to create a Task:
1. Click **More** (▪▪▪) to the right of the file and select **Tasks**.
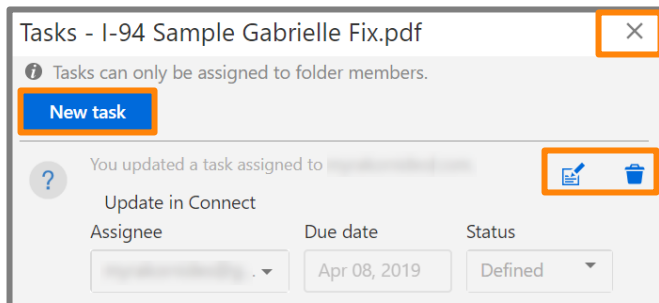

2. Click **New Task**.

3. Complete the following:
   a. Task description
   b. Assignee
   c. Due Date
4. Click **Create task**.

5. The Task will remain open. The User can take the following actions:
   a. Create a **New task**.

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b. Edit the Task (📝).
c. Delete the Task (🗑).
d. Close out of the Task (✖).

How to Manage Folder Notifications

Email notifications can be sent whenever a User:

- Uploads a file to the folder
- Adds a new file version
- Edits a file
- Copies / moves a file to the folder

The email contains the name of the person who added the file and a secure link to access the file.

To turn on or change folder notification settings, right-click the desired folder, then click **Manage Notifications**.
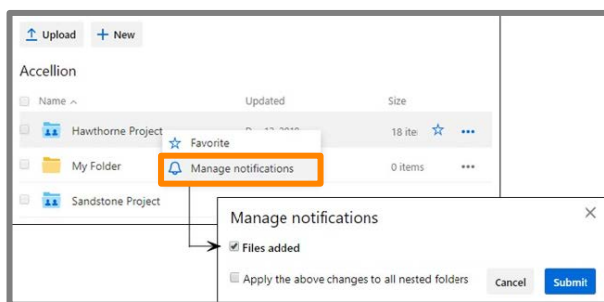
Note: A folder owner or manager may do this for you when they invite you to share the folder.

How to Track Files Sent to Others

Users can opt-in to receive file activity reports when the links expire. Each report contains:

- When the files were opened, downloaded or copied to a folder
- Files not accessed (in case you need to resend)

After creating your message and attaching files:
1. Click **More Options**.
2. Select **Notify me when file attachments expire**.

To receive an activity report at any time:
1. Access the **Sent** folder.
2. Click the **Track** button next to the message.
3. In the tracking summary, click **Send Report**.

Install Kiteworks App on Apple Device (iPhone)

1. Navigate to the Apple iPhone App Store.
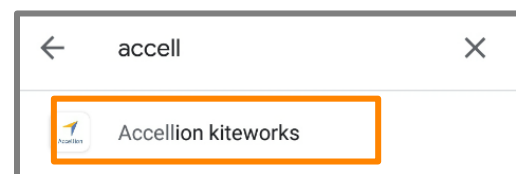2. Search for **Accellion kiteworks** app and tap **GET > Install**. The app will install in a few minutes.

3. If prompted, enter your Apple ID and Password.
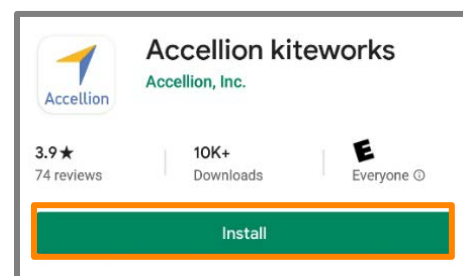
Install Kiteworks App on Android Device

1. Navigate to and open the **Google Play Store.**

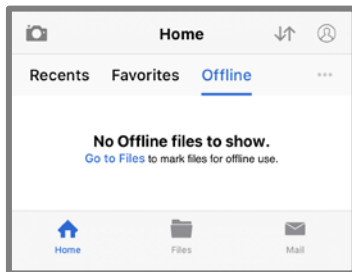2. Look for **Accellion Kiteworks** app and tap to open.

3. *Click Install; the app will install in a few minutes.*
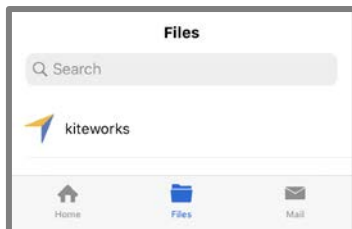
Use the Kiteworks App

Before using the App, set up your account, refer to [How to Access Kiteworks (Desktop)](#).

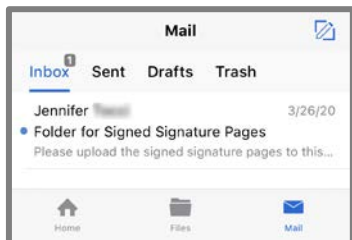1. Open the **Accellion Kiteworks** app on your device

In **Home** toggle between **Recent**, **Favorites** and **Offline** to view files.

Take a **Photo** , check **Upload/ download progress** and change **Settings** .

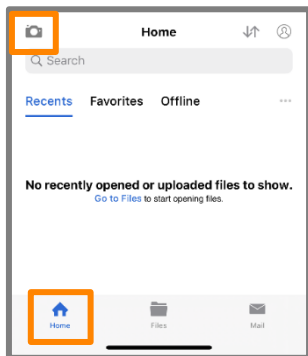In **Files**, navigate to folders shared with you in the **Kiteworks** option.

In **Mail**, view Kiteworks mail in the **Inbox**, **Sent**, **Drafts** and **Trash**.
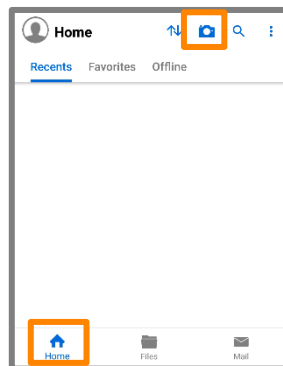
Tap to create a new message.

Take a Photo of a Document

1. Click on the *Home* icon
2. At the top, click the *Camera* icon

iPhone

Android

3. When the photo function opens, make sure:
   - The entire document and its edges are viewable
   - You have ample lighting
   - No shadows appear on the document
   - Document is clear in the preview

4. Tap the *circle* to take the picture

5. Tap *Select destination* (top right) to choose the Kiteworks folder to save the file in. **Files** > choose destination folder to save the file in.
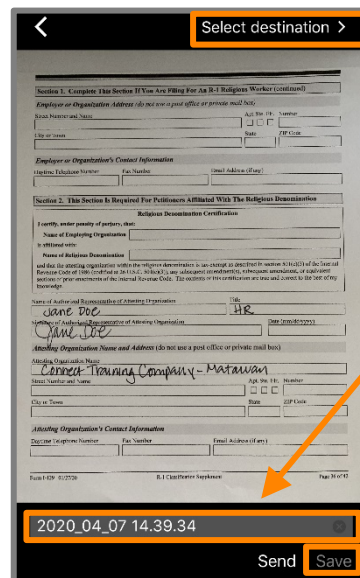
Rename the file to be accurate to Person and Case it applies to.

Include the Case #.

Tap *Save*.

Tapping *Send* will allow you to send the File to a Fragomen email address.

Need Help?

For questions, contact your Fragomen Representative or [Connect Support](#) (connectsupport@fragomen.com).

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