Secure File Transfer Protocol Using Kiteworks

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Abstract: *Accellion Kiteworks is a secure file sharing and collaboration platform designed primarily for businesses and enterprises. It offers features such as secure file transfer, document collaboration, and data security controls to help organizations manage and share files securely both internally and externally.*

Keywords: One of its key features is its focus on security, offering encryption, access controls, and other measures to ensure that sensitive data remains protected. This makes it particularly appealing for industries such as finance, healthcare, and legal services, where data security and compliance are paramount concerns. Kiteworks allows users to access files from various devices and platforms, facilitating collaboration among team members regardless of their location. It also integrates with existing IT infrastructure, making it easier for organizations to incorporate into their workflows.

1. Introduction

Kiteworks is a secure file-sharing solution from Accellion that enables you to access and share enterprise information anytime, anywhere securely and easily. You can access your files and folders in the office and on the go and can be sure that your files are up-to-date and protected. Kiteworks gives you powerful and secure access to content wherever you are, so you can share with confidence. The concepts discussed here can also be applied to your mobile device. For more information.

Sign In:
You receive an email as below from your Administrator, indicating that your kiteworks account has been created. Click Activate, and you are taken to the kiteworks URL, where you can sign in.
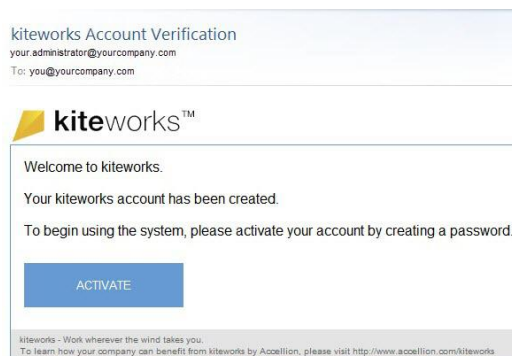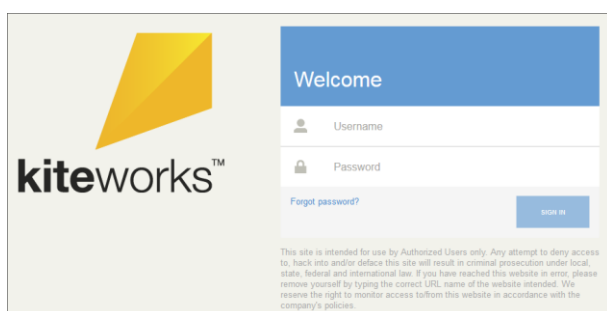

Figure 1: Sign in Screen

Figure 2: Welcome Screen

Add your username (your email address) and password. If you haven't logged in before and this option is available, click I don't have an account yet. You will be prompted to create a password.

If you have forgotten your password, click Forgot password, and your Administrator will process your request, usually by sending you a new activation link.

2. Two- Factor Authentication

Two-Factor Authentication (2FA) is a license-enabled feature that requires an additional security step when users log in to Kiteworks.2FA enhances the regular authentication by adding a "possession factor" (something the user has, such as a token, SMS-based phone or device, or email connection) with a "knowledge factor" (something the user knows, such as a password) into the authentication process.
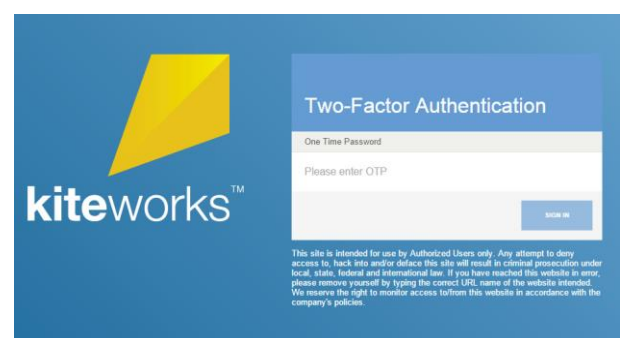

Figure 3: Authentication

3. Collaborate

You can collaborate with others in four distinct ways:

Folder Management and Actions
Sharing folders enables you to collaborate and share files with groups of people inside and outside of your organization. The process involves creating a folder, adding files to that folder, and then adding. People to the folder, giving them access. The extent of their access is determined by you, the creator and manager. Permissions, or Roles, that you assign to others can range from being managers of those files (with the ability to

add users, upload, download, lock, edit, and delete files), to only having the ability to view the files that exist in that folder. You can perform the following actions on folders:

- Create a New Folder
- Share Access to a Folder
- Edit Folder Properties and Mark a Folder as Restricted
- Manage Notifications
- Download an Entire Folder
- Add or Upload Files to a folder
- Delete a Folder

File Management and Actions
When the recipient receives the Mail, she/he clicks the link and downloads that file to his or her own system from Kiteworks.

You can perform the following actions on files:

- Email a File or Email a Preview of a File
- Add or Upload Files
- Download files
- Lock/Unlock
- Delete and Recover a Deleted File
- View and Change Versions
- Add to The Move Tray

Add Tasks and Comments
Those people who have access to a shared folder in kiteworks can add a comment to individual files.

Owners, Managers, and Collaborators can also assign tasks to other users in the folder. These tasks are tracked on the Activities View and, on the activities, listed underneath the file.

Access Enterprise Content Sources (License-Enabled)
With the Enterprise Connect feature enabled, kiteworks provides access to remote file shares and cloud storage solutions such as SharePoint, CIFS, Box, Google Drive, and others. Access to enterprise content sources are managed by your kiteworks Administrator.

Folder Management and Actions
Folders enable users to collaborate and easily share the files within the folder. Note that what you're allowed to do depends on what role you have in that folder. See Roles for more information.
When you navigate to a folder using the detail view, the following information appears.
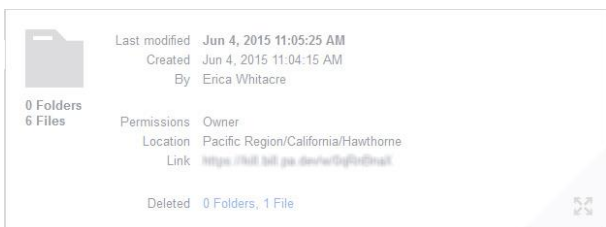

Figure 4: Folder Structure

Create a New Folder
To add a folder, perform the following steps.
- In kiteworks, navigate to where you would like the new folder to exist.

- In the upper-right corner of the screen, click New () and select Folder. The New folder windows appear
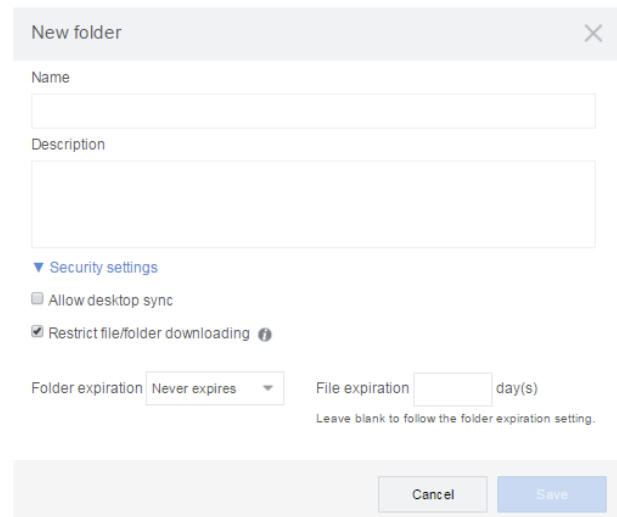

Figure 5: New Folder

- Name the folder and add a description.
- Select the Security Settings:
- Allow desktop sync!
- Restrict files/folder downloading (see Restricted Folders for more information)
- Set a folder expiration date and determine whether sync will be permitted. The default is to not allow.
- **Note:** These options are only available for root folders, i. e., folders that exist in the kiteworks Files folder, not a nested folder within kiteworks Files. Nested folders inherit the setting of the root folder. (For more information about sync, refer to the kiteworks Desktop Client Installation and User's Guide, located in the help button on kiteworks).

4. Roles

Roles are assigned by the manager of a specific shared folder; your role determines what functions you are allowed to perform in that shared folder.

The available roles that can be assigned to users in a folder are:

Viewer
The only action the user can perform is to view the files in a folder via the Accellion interface.

Viewers cannot download a file to their device or desktop, they can only view files using the

Online Viewer.

Downloader
Used for someone who needs to be able to download and view the files in a folder, but not upload new versions, upload new files, or assign tasks to others with access to that folder.

Collaborator

Used for someone who needs full access to the files in a folder. Collaborator cannot view existing users, or manage other users' access to the folder.

Manager

The second-highest level of control of a folder; generally assigned to someone who needs full access to all files within a folder and to control others' access to a folder.

Owner

The highest level of control of a folder; assigned by default to the person who creates a folder. Any content in the Owner's folder counts against his quota.

User Roles in Restricted Folders

When a folder is marked Restricted, Collaborators and Downloaders cannot move content out of the restricted kiteworks folder.

Collaborator

Cannot download or email content from the restricted folder. Collaborators can use the kiteworks. Editor to update and edit Microsoft Files as well as annotate PDF files, but are unable to download, sync, or open the restricted files in external applications.

Downloader

Downloaders can only view the files in restricted folders using the Online Viewer.

Note The roles listed below are examples only. Adjust the roles based on your particular
organization's needs.

Manage Your Storage Quota

- Your Administrator sets your storage quota. This quota applies to all folders that you own, and all files that are uploaded to the Move Tray (see Add or Upload Files). Having any other role in other folders does not affect your storage quota.
- To manage your storage quota most efficiently, follow these best practices:
- Clear the Move Tray of files that you have uploaded (see The Move Tray).
- In folders that you own, delete unnecessary files (refer to Delete and Recover a Deleted File).
- Permanently delete files or folders that you have deleted from your folders (refer to Delete a File Permanently).
- Remove unnecessary previous versions of files in a folder (see View and Change Versions).
- Contact your kiteworks Administrator to increase your storage quota.

5. Edit Folder Properties

If you are an Owner or Manager of a folder, you can edit the folder's properties. These properties include the name and description of the folder, mark the folder as restricted or allow desktop sync and change the folder and file expiration dates.
Note If the folder is a "root" folder, that is, at the top of the folder hierarchy under "kiteworks Files", you can edit the folder expiration date. Otherwise, this date cannot be edited.

In "root" folders, you can also edit whether the folder can be synced using the kiteworks Desktop Client.

Installation and User's Guide. To download the Desktop Client, from the Help screen on the kiteworks interface, click Desktop Client for Mac or Windows.

To edit the properties of a folder, perform the following steps.
[1]   Navigate to the folder you would like to edit.
[2]   In the upper-right corner of the screen, click Actions and select Edit Properties. The Edit properties window appears.
[3]   Make the changes to the field (s) you wish to edit.
[4]   Click Submit. The properties have now been changed.

Figure 7: Edit Folder

6. Download an Entire Folder

- Navigate to the folder you would like to download.
- In the upper-right corner of the screen, click Actions and select Download current folder.
- In your operating system's Select destination window, navigate to the location to which you would like the folder to be downloaded, and click Save.
- Navigate to the location to which you would like the folder to be downloaded and click Save.
- You are shown the status of the download, and when the download is complete, you are shown "Download complete". Click to close.
- If you click Cancel during the download, the download stops and, depending on how much of the download has progressed, the folder may be partially downloaded to the location you specified.
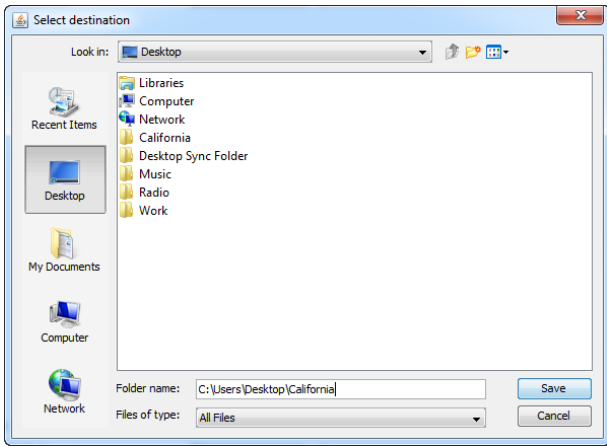
Figure 6: Download Folder

7. Drag and Drop into Kiteworks

Perform the following steps to add a new file into kiteworks.
- Navigate to the folder in which the file (s) will reside.
- From your operating system's file browser or desktop, drag the file you would like to upload to kiteworks. A blue dotted outline appears around the destination folder.

Note The source location for the file must be from your operating system or desktop; the files cannot be in another app, for example, Microsoft Outlook. In this case, the file could be dropped in the selected folder, in any of the sub-folders in the selected. folder, or in the Move Tray.
- Drop the file into your preferred location. A confirmation window appears. (To add more files to the same location, click Choose Files.)
- Click Add. After processing, the file is now uploaded to the location you specified.

File Management and Actions Drag and Drop between Folders

To move files between folders, perform the following steps.
- Select the list view (), which shows all of the folders available to you.
  Select the file (s) to move and drag the file to the destination folder. A blue dotted outline appears around the **Using kiteworks**
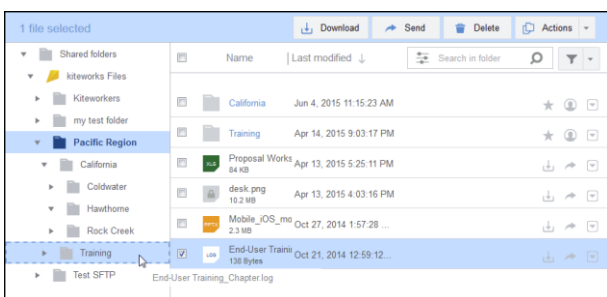- destination folder.

Figure 7: Drag Folders

8. Mail

You can Email a File from kiteworks to another user. Instead of attaching the file itself to the email, kiteworks adds a link to the file and puts it in the email. When the recipient receives the email, s/he clicks the link and downloads that file to his or her own system.

You can also Email a Preview of a File, which means that instead of sending a link to a downloadable file, you send a link to a view-only version of the file that cannot be edited.

When you send or receive a file, send a file preview, or save an email draft, that activity appears in the folder using the detail view.
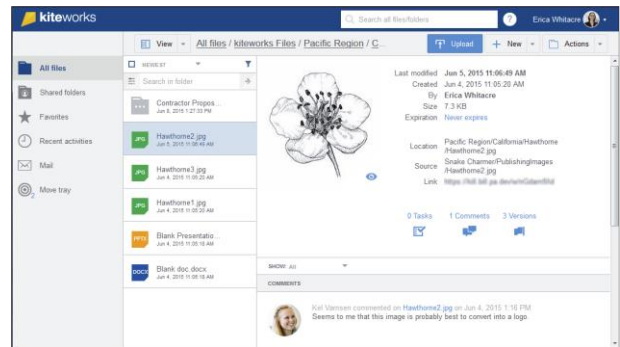
Using kiteworks.

Figure 8: Email

References

[1] https: //www.kiteworks. com/secure - file - transfer/sftp - security/