

Community College and University OSA ShareFile User Instructions

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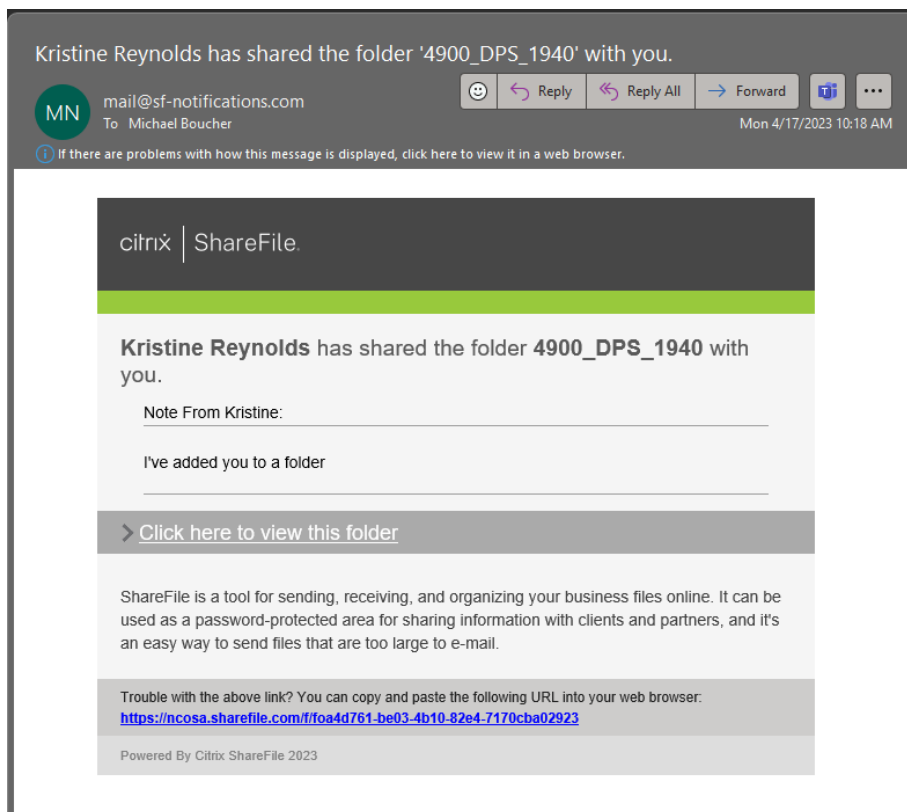
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1 ShareFile Access

Once a User has been added to a folder, each person will get an email with a link that gives ShareFile access. The NC Office of the State Auditor (OSA) Data Team will set up permissions. Once the link is clicked, a free account with ShareFile needs to be created which will include setting up a user ID and password. Make sure to save this password as it will be unique to each users email.

To easily navigate to the NC OSA ShareFile folders in which you have been granted access to, you can bookmark the following link in your preferred internet browser.

<https://ncosa.sharefile.com/>

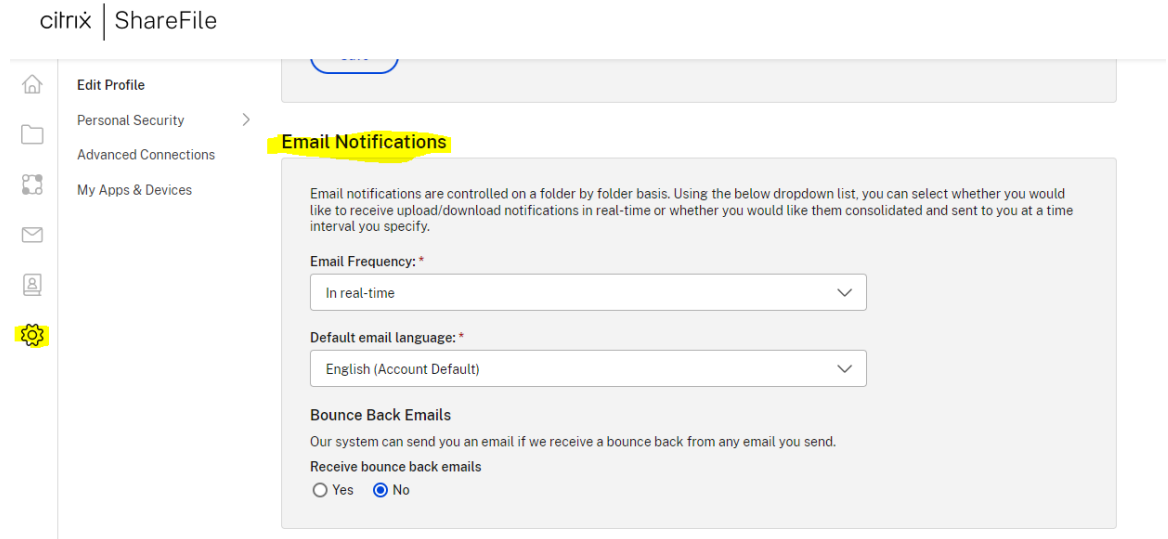


The OSA Data Team will send an email to the User providing a link to their ShareFile folder and instructions on how to access it.

Once the ShareFile folder is setup, there are a few things to note:

- 1) There are options that each user can set to determine how often they receive emails.
 - a. One option is to go into the settings and change the Email Frequency (see below). There are many options that can be set - Every 15 minutes, Every hour, Twice a day, and Once a day.

ShareFile_User_Instructions



b. Another option is to check the box below the folder documents (see below) to be emailed.

<input type="checkbox"/>	Name ▲	#	Size	Uploaded	Creator	⋮
<input type="checkbox"/>	☆ 9937_UAT_ShareFile_Auditee.xlsx		24 KB	1:23PM	M. Boucher	
<input type="checkbox"/>	☆ TEST_EXCEL.xlsx		8 KB	1:11PM	J. Argent	
<input type="checkbox"/>	☆ TEST_PDF (2).pdf		675 KB	1:23PM	M. Boucher	
<input type="checkbox"/>	☆ TEST_PDF.pdf		675 KB	1:10PM	M. Boucher	

Email me when a file is: Downloaded from this folder Uploaded to this folder

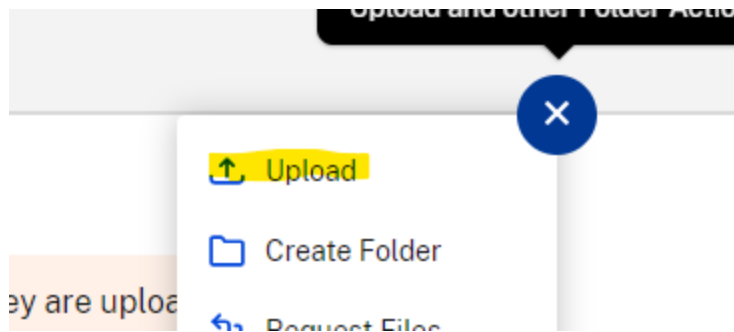
2) When multiple versions of a file are uploaded to the same folder, there will be a “file has multiple versions icon” (see blue square below). Click on the blue icon and it shows how many versions there are and the user can download each one. User settings should not allow any files to be deleted from the folders.

<input type="checkbox"/>	☆ TEST_EXCEL.xlsx	8 KB	3:51PM	M. Boucher	
<input type="checkbox"/>	☆ TEST_PDF.pdf	675 KB	3:50PM	M. Boucher	

3) Note that there is a 10GB limit for uploaded files.

2 File Upload

In order to upload a file to ShareFile, you must log in and navigate to your unique folder. Once inside the folder, you can drag and drop the file from a file explorer tab into the folder. Alternatively, you can click the “+” symbol (pictured below) and then click upload here which will open up a new screen where you can browse files on your computer to select to upload.




While you may upload multiple files at a time, **DO NOT** upload a folder with files inside **or** create a sub-folder inside of the ShareFile folder location.

3 Types of ShareFile Folders


Occasionally, a person might have access to more than one ShareFile folder. There are two types of folders that one may have been granted access to.

1. Folder for Annual File Submission

- a. These folders never delete and access is maintained by OSA. In order to add or remove users from this folder you must email FTP_Help@ncauditor.net with the request.
- b. The following naming convention applies to this type of folder for Universities
 - i. NNNN_UniversityAbbreviation
 - ii. Ex:


 6040_UNCG_Annual

- c. The following naming convention applies to this type of folder for Community Colleges
 - i. NNNN_Community_College_Name_CC
 - ii. Ex:


 6801_South_Piedmont_CC_Annual

2. Folder for Additional Audit team support documentation

- a. These folders delete one year from the creation date.
- b. The following naming convention applies to this type of folder for Universities
 - i. NNNN_University_Abbreviation_NNNN
 - ii. Ex:

 6050_UNCC_1530_Support

- c. The following naming convention applies to this type of folder for Community Colleges
 - i. NNNN_Community_College_Abbreviation_NNNN
 - ii. Ex:

 6838_GTCC_2408_Support

4 ShareFile File Retention

All files that are uploaded to a Annual File ShareFile folder will be swept to a unique location on OSAs drive within 24 hours. Do not be alarmed if you do not see previously uploaded files inside of the Annual ShareFile folder location.

All files that are uploaded to an Audit team support ShareFile folder will remain in the folder for 30 days. Once deleted, files remain in the recycle bin for up to 45 days and can be recovered up until that point. If you need to recover a file that has been deleted please email FTP_Help@ncauditor.net for assistance.

If a file is accidentally put in ShareFile that needs to be deleted OR a user needs to be added or removed from the folder – contact the OSA Data Team for assistance.

5 Password Reset

Passwords DO NOT expire and will be created and maintained by each individual user. There might be many different users that have access to the same folder, however, the passwords for each user will differ.

If a password is lost or forgotten go to the following link (<https://ncosa.sharefile.com>) and select the “Forgot Password” option and complete the steps to reset the password.

If issues persist, OSA can assist with resetting the password. Please email FTP_Help@ncauditor.net or contact a data team member to get assistance with password resets.

6 Contact Information

Please e-mail FTP_Help@ncauditor.net to get in touch with an OSA Data Team member if you have any additional questions or need further assistance.