Citrix ShareFile Information & Instructions

Because protecting your sensitive information is important to us, McClure Associates utilizes a third-party web service called Citrix ShareFile. Citrix ShareFile allows us to safely and securely send files that may contain sensitive information such as social security numbers, bank account information, tax returns, etc. We also allow our clients to use this service to securely send files to us.

Citrix ShareFile stores files in secure, SSAE 16 audited datacenters. Their privately managed server farm is equipped with the latest firewalls and Internet security updates to help keep data completely safe and physical security measures from fingerprint scanners to ballistic-proof exteriors protect against theft and natural disaster. ShareFile stores client files at rest using AES 256-bit encryption, a Federal Information Processing Standards (FIPS) encryption algorithm. Citrix ShareFile is also HIPAA compliant.

If you have any questions about the use of Citrix ShareFile please contact our office and ask to speak to someone about ShareFile.

You can obtain more information on the security of Citrix ShareFile here;
https://support.citrix.com/article/CTX208317

Activating Your Account

Before accessing ShareFile, an account must be created for you. You will receive a Welcome Email once your account has been created.

1. Click the link in your email to active your account.
2. Enter a secure password and continue to the following page to set your account preferences.
3. Once your preferences have been set, you will be taken to your home page that will list all of the folders you have access to. If you do not see any folders, please contact us.

Downloading an Email Attachment

If someone from McClure Associates sends you an email with a ShareFile attachment, you will need to click the link to download the file and then save it on your computer.

1. Click the "Download Attachments" button in the email.
2. Enter your Email, Name and Company.
3. Click the "Download" button to save the file to your computer.

Depending on your browser, the file might automatically start downloading and save in the Downloads folder on your computer, or a pop up box might appear asking you where you would like to save the file.

If this is a file you will continuously need, we recommend saving it in a safe location. ShareFile files have expiration dates and you will no longer be able to download the file after the expiration date.

Downloading a file from the website

If McClure Associates has created a File Box for your files, you will need to log in and download the files.

1. If you have email notifications enabled, you will receive an email notifying you that a new file has been created in your file box.
2. Follow the link in the email to sign into your ShareFile account.
3. Click the Download button and save a copy of the file to your computer.

If this is a file you will continuously need, we recommend saving it in a safe location. ShareFile files have expiration dates and you will no longer be able to download the file after the expiration date.

Uploading a file from an email request

If you receive an email from McClure Associates requesting a file, follow the link in the email, enter all of your information then upload your file.

1. Click the "Click here to upload files" link in the email.
2. Enter your email, name and company.
3. Click the "Browse Files" option
4. Navigate through your computer folders to find the file you would like to send us.
5. Click on the file and select "Open".
6. If you need to send us more than 1 file, click the "Add More" button in the top right and repeat steps 4 and 5.
7. Once all of your files are listed in the middle of the screen, select the "Upload" button
8. A progress bar will appear on your screen to show you the files uploading.
9. Once all the files have been sent, the progress bar will disappear and a yellow box with "File(s) uploaded successfully" will appear.
10. You can close your browser once the files successfully upload.

Uploading a file to your file box

If you continuously send McClure Associates files, you will have a file box you can upload files to. You will need to log into the website and upload your file(s).

1. Visit https://McClureAssoc.ShareFile.com
2. Log into your ShareFile account previously created for you.
3. Select the appropriate company folder and subfolder
4. Click "Upload Files" in the upper right
5. Click the "Browse Files" option
6. Navigate through your computer folders to find the file you would like to send us.
7. Click on the file and select "Open".
8. If you need to send us more than 1 file, click the "Add More" button in the top right and repeat steps 4 and 5.
9. Once all of your files are listed in the middle of the screen, select the "Upload" button
10. You will be taken back to your folder/file list and a progress bar will appear next to the file you selected for upload. Once upload is complete, the progress bar will disappear.