

Accellion for Google Docs, Sheets, & Slides: User's Guide

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Getting Started

Share Files Securely Using the Accellion for Google Docs, Sheets, & Slides Add-on

The Accellion for Google Docs, Sheets, & Slides Add-on enables you to securely email and share through kiteworks—Accellion’s secure, content collaboration platform. The plug-in integrates with Google Docs, Sheets, & Slides so that you can seamlessly access, share, and collaborate on sensitive information in a secure and compliant way.

With the Accellion for Google Docs, Sheets, & Slides Add-on, you can:

- Send files as secure links. You determine whether recipients must sign in to your Accellion server to access the files.
- Copy files to Accellion folders. If you’re the Accellion folder owner or manager, you control who can view and download files from your folders. You also specify how long users can access the files.

Files that you send through Accellion or that you copy to Accellion folders automatically convert to Microsoft Office files. This enables recipients and shared folder members to view and collaborate on the files in Office or download the files for their own use.

All files that you send, copy, upload, or download using Accellion undergo antivirus (AV), data leak prevention (DLP), and advanced threat protection (ATP) scans to ensure that the information you share is safe and private.

Verify the Add-on is Enabled in Google Docs, Sheets, & Slides

The Accellion for Google Docs, Sheets, & Slides Add-on gets installed for you by your administrator.

To verify that the add-on has been added to Google Docs, Sheets, or Slides, open a file, and then click Add-ons > Accellion. Verify that the submenu contains these options:

- Send Using Accellion
- Share Copy Using Accellion

If you don't see menu options for using the add-on, contact your server administrator for assistance. If you're an administrator, refer to the *kiteworks Administrator's Guide* for instructions on how to install and enable the add-on for use with Google Docs, Sheets, & Slides.

Using the Accellion for Google Docs, Sheets, & Slides Add-on

Send Files Using Accellion

You can send Google Docs, Sheets, & Slides files securely through Accellion to other users. To keep the files secure, the files are uploaded to your Accellion server and a link is sent to recipients for accessing the files. When the link expires, the files are no longer accessible and deleted from the server.

Files that you send through Accellion or that you copy to Accellion folders automatically convert to Microsoft Office files. This enables recipients and shared folder members to view and collaborate on the files in Office or download the files for their own use.

To send a file using Accellion:

- 1 In Google Docs, Sheets, or Slides, open the file you want to send, and then click Add-ons > Accellion > Send Using Accellion.
- 2 If prompted, sign in to your Accellion server and authorize your Google account.
- 3 Enter the email addresses of the recipients.

Result: As you type, suggestions are made from your Contacts list in the Accellion Web application. You may also be able search your company directory for an email address.
- 4 To set an expiration date for file links, add more security, and more, click Delivery Options.
- 5 Click Send.

Table 1. Message options

Setting*	Description
Secure access	Specify who can access the message, including when recipients forward it to other users.
Protect message body	Recipients must sign in to view the message and access file links. Caution: The subject line will not be hidden from recipients. In your Accellion Web application Sent folder, the  indicates a secure message.
File access expires	Select the number of days after which the links will be deactivated. Once the links expire, recipients can't download the and the uploaded will be scheduled for deletion from the server.
Add digital fingerprint	Include an MD5 digital fingerprint with each file attachment for recipients to verify the integrity of the file.
Notify me when files are downloaded	Email a time-stamped notification that includes the name of the file and the email of the person who downloaded it.
Send me a copy	Send a copy of the message and file links to your email address.

* Your user profile on your Accellion server determines which settings you see and can modify. For assistance, contact your server administrator.

Copy Files to Accellion Folders

You can copy Google Docs, Sheets, & Slides files to your Accellion folders, and then share them with other users. In a folder, you can specify each user's role based on the type of access you want them to have to the files.

Files that you send through Accellion or that you copy to Accellion folders automatically convert to Microsoft Office files. This enables recipients and shared folder members to view and collaborate on the files in Office or download the files for their own use.

If you overwrite a file, the prior version gets saved so that you can access its file history. You can use the Accellion Web application to view, download, roll back, and delete file versions. For instructions on how to manage file versions, refer to the online help in the Accellion Web application or the *kiteworks Web User's Guide*.

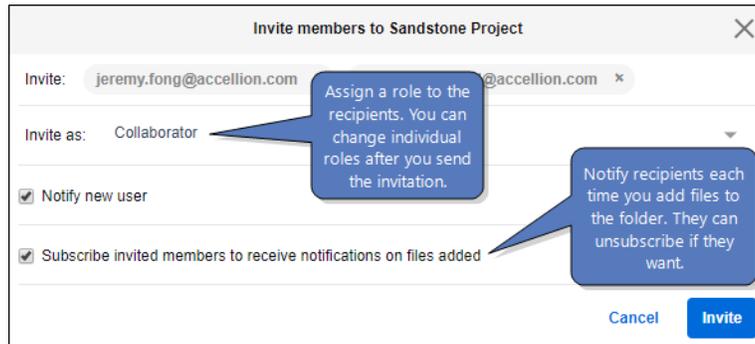
Role: To copy files to Accellion folders, your role in the Accellion folders must be Owner, Manager, or Collaborator.

To copy a file to an Accellion folder:

- 1 In Google Docs, Sheets, or Slides, open the file you want to copy, and then click Add-ons > Accellion > Share Copy Using Accellion.
- 2 If prompted, sign in to your Accellion server and authorize your Google account.
- 3 From the Share Copy Using Accellion screen, browse to where you want to copy the file.
Alternative: To copy the file to a new folder, click New Folder, and then create the folder.
- 4 Click Copy, and then click Done.

To share an Accellion folder:

- 1 While copying a file to Accellion, in the destination folder, click Invite.
- 2 Type the email addresses of the users you want to share the folder, and then select their names from your Accellion contacts list or click "Add this as a new contact".
Result: As you type, suggestions are made from your Contacts list in the Accellion Web application. You may also be able search your company directory for an email address.
- 3 Select a role to assign to the new folder members.
Rationale: Roles contain permissions that allow folder members to perform tasks in shared folders in the Accellion Web application. You can change individual user roles after you send the invitation. For a list of roles and what people assigned to them can do, refer to the online help in the Accellion Web application or the *kiteworks Web User's Guide*.
- 4 To include a link to the folder with your invitation, select Notify New User. If you don't send a link, folder members can still access the folder when they sign in to the Accellion Web application.
- 5 To notify the new folder members whenever files are added to the folder, select "Subscribe invited members to notifications on files added". In the Accellion Web application, folder members with the appropriate roles can also subscribe to folder notifications on their own.

6 Click Invite.**To change a user's role in an Accellion folder:**

While copying a file or folder to Accellion, in the Members pane, click the arrow next to the user's role, and then select the new role. To revoke user access to the folder, click Remove User.

Additional Resources

Get Support

Need assistance with your Accellion product? Contact Accellion Customer Support with requests for assistance or to submit product enhancements.

Contact customer support at support@accellion.com.

Learn More About Accellion Products

Visit the Accellion Support Portal to read technical articles, view training videos, search the knowledge base, and download additional user documentation.

Visit the Accellion Support portal at accellion.com/support.

Send Feedback on This Document

We invite you to tell us of any errors you encounter in this document and to suggest ideas for improving it. Help us better understand what you expect from our documentation so that we can continuously improve its accuracy and usability. We seriously consider every comment we receive.

Send your comments to us at techpubs@acellion.com.