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# SHIFT For Outlook

# SHIFT For Web

# User Guide

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**SHIFT**  
Secure High-Integrity File Transfer

Version 2.9.2

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## 1 Overview

SHIFT (Secure High-Integrity File Transfer) is an easy-to-use file transfer service designed to handle large files that exceed standard email size limits.

SHIFT can be accessed:

- within Microsoft Outlook – SHIFT For Outlook
- via a web browser – SHIFT For Web

The platform is compliant with strict security standards, and users can opt for extra protection such as multi-factor authentication SHIFT access. Users can securely transfer files of any size, these are encrypted and hashed for the duration of the file transfer lifecycle.

Files are deleted once they’ve been downloaded by the recipients, and senders get notifications about the transfer’s status. SHIFT also gives users the option to set a retention period for files, up to 30 days, after which they are automatically deleted. Users can reliably send and receive files with other SHIFT users, with free users having limited capabilities, while premium users have broader access. SHIFT also offers an admin portal for managing file transfers, monitoring server status, and checking performance stats.

More information can be found at: <https://www.livertonsecurity.com/products/shift/>

## 2 Support

The monthly licence fee includes email and phone support and is available during business hours: Monday to Friday, 9am to 5pm NZST.

- Email Support: [support@livertonsecurity.com](mailto:support@livertonsecurity.com)
- Phone Support: +64 508 5483 7866 (0508 LIVERTON)

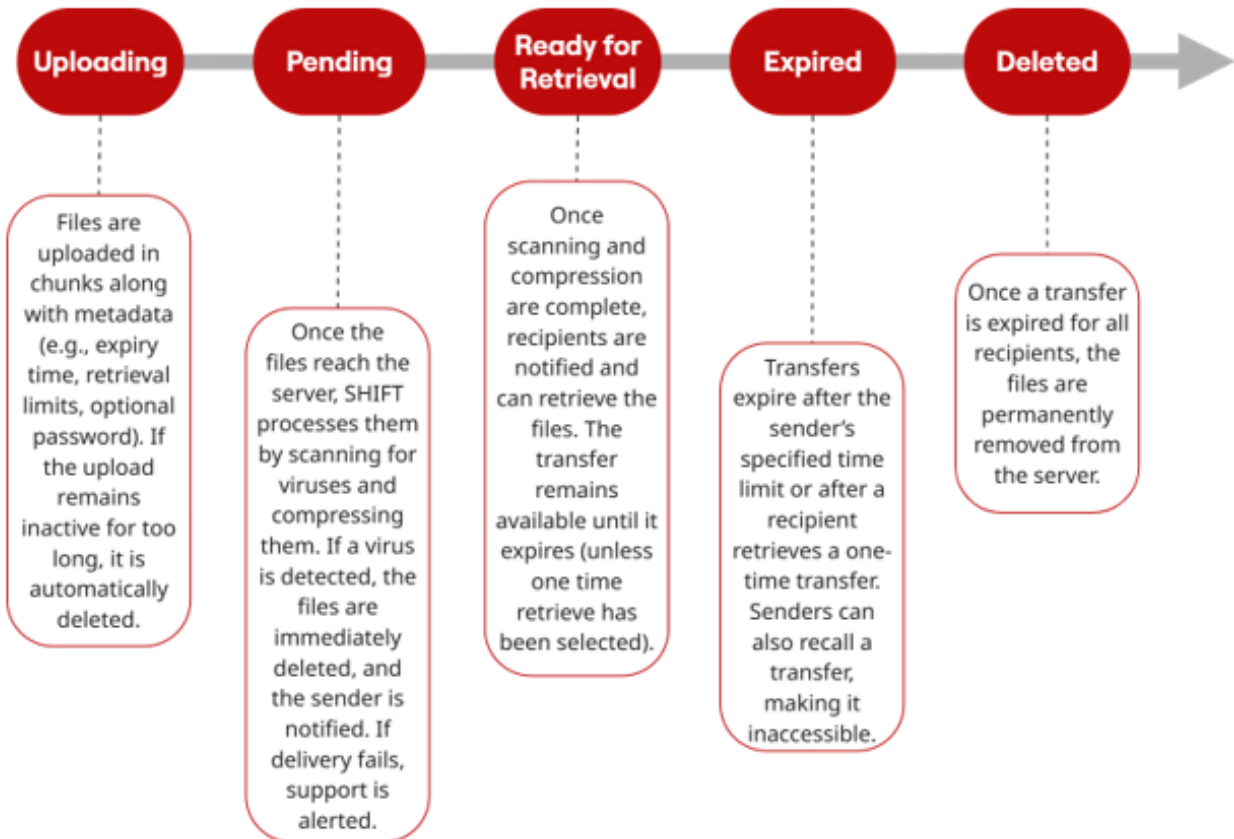
Urgent support is also available outside of these hours via the phone number listed above.

## 3 SHIFT User Types

There are five types of SHIFT user accounts:

Type of User Account	Description
<b>Public Users</b>	This is the default account for any user that has not purchased a SHIFT licence. Public users have limited SHIFT access and can only send files to SHIFT users who have already sent them files or an invitation. They can receive files from any SHIFT Organisation or Premium user.
<b>Premium Users</b>	These users receive the full benefits of SHIFT, they can send and receive files with anyone that has an email address.
<b>Organisation Users</b>	Organisation users are a group of Premium users within the same email domain. The user can be assigned a branded notification template (with their organisation’s brand and logos), specify which SHIFT Transfer Node should be used for their transfers and can enforce multi-factor authentication for all their organisation users.
<b>Organisation Admins</b>	These users are SHIFT Organisation users which can also manage their organisation's account via the SHIFT Admin page. This means that this user can view statistics and file transfer records for their specific organisation.

## 4 The SHIFT File Transfer Lifecycle



## 5 How to Use SHIFT For Outlook

### 5.1 Obtaining and Updating the Licence

Both SHIFT Premium and SHIFT Public licences can be downloaded via the Microsoft AppSource at: <https://appsource.microsoft.com/en-us/product/office/WA200006390>

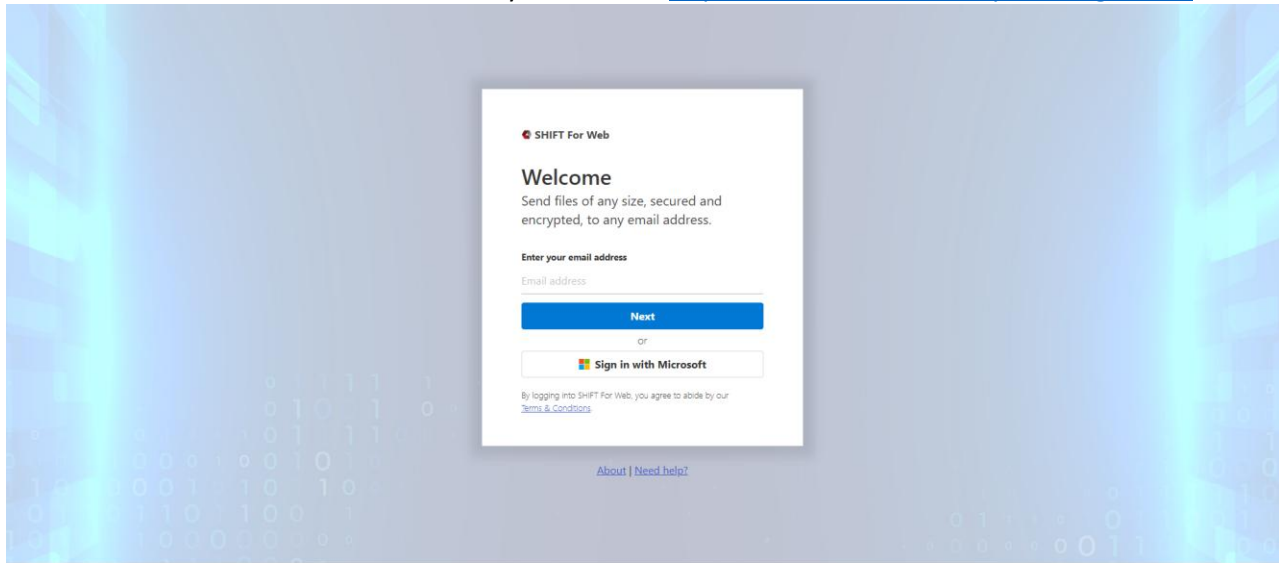
To purchase SHIFT Organisation licence please contact [MailAdviser Support](#).

### 5.2 First Login

1. With a SHIFT licence, users can use both SHIFT for Outlook and SHIFT for web.
  - a. To use SHIFT for Outlook, install SHIFT as a MS-Outlook Add-in first. Then click the SHIFT icon in the Outlook ribbon.



b. SHIFT for Web can be accessed via any browser at: <https://shift.livertonsecurity.com/login.html>



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2. User authentication is required to use SHIFT for Outlook and for Web.
  - a. On both Outlook and on Web, SHIFT users can be authenticated by entering the short-lived, 6-character validation token. On SHIFT for Web the user must first enter in their email address before selecting *Submit*. Simply retrieve the access code sent to the email address used to login to SHIFT, then enter the token and select *Submit*.
  - b. SHIFT for Outlook users can alternatively be automatically authenticated for outlook via an existing Azure Active Directory account.
  - c. SHIFT for Web users can alternatively choose to authenticate with Microsoft OAuth by selecting *Sign in with Microsoft*.
3. Premium and Public users are prompted during the first login to choose whether to enable multi-factor authentication (MFA).

 **SHIFT For Web**

## Welcome

Send files of any size, secured and encrypted, to any email address.

**Do you want to use multi-factor authentication with this account?**

Yes

No

**Restart**

By logging into SHIFT For Web, you agree to abide by our [Terms & Conditions](#).

User Profile ✕

Browser settings

Multi-factor authentication

On  Off

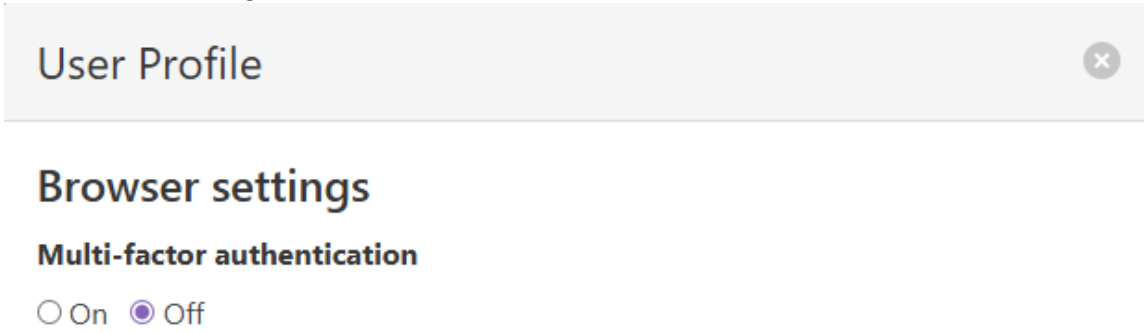


Please scan the QR code with your authenticator app and enter the code below

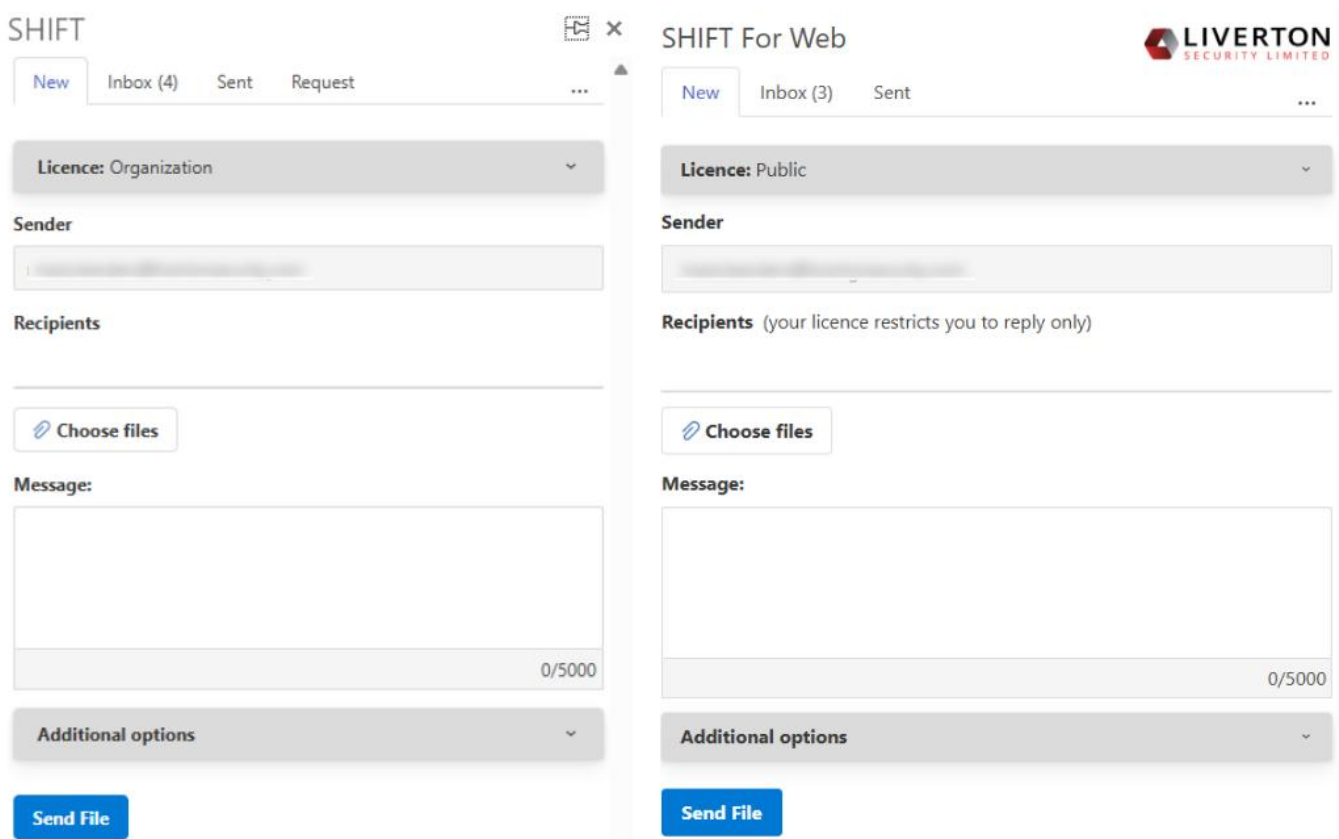
Code

Apply

- a. If *Yes* is selected, the user is required to scan a QR code and enter the MFA code generated on their mobile device to complete authentication
- b. If *No* is selected, MFA will not be required. The user can log in using their email address and the verification code sent to that email.
- c. The MFA settings can be adjusted at any time by navigating to the three dots on the top right of the SHIFT UI and selecting the User Profile.



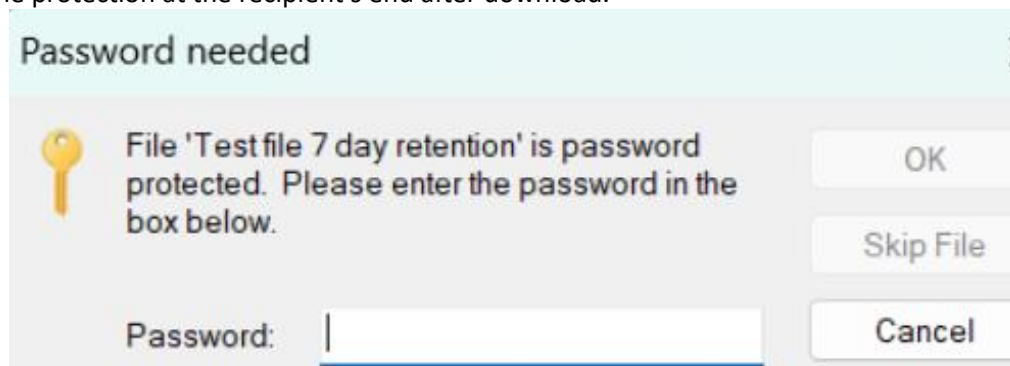
4. Once successfully logged in, users will see the SHIFT homepage:



Note: While the display may appear slightly different, the procedure is the same for SHIFT for Outlook and SHIFT for Web for sending and retrieving files.

### 5.3 Send Files

1. Under the New tab, the sender (you) has already been selected. Fill out the desired recipients, files can be sent to many recipients at one time. If files have previously been sent to the recipient, their email address will appear below the text box while typing and can be selected from the list.
2. Select *Choose Files* and select 1 or more files of any size.
3. Fill in the Message section with the text that will be sent to the recipient/s.
4. Click the *Additional options* bar for the following optional selections to appear:
  - a. A file transfer can be flagged as one time download by ticking *One time retrieve*. If this option is selected, the file transfer expires for a particular recipient once that recipient has retrieved the files.
  - b. The *File retention (1 to 30 days)* option determines how long recipients have to retrieve the files before they expire. By default, the retention period is set to 7 days. The sender can adjust this duration up to a maximum of 30 days. Any file that is not retrieved within the retention period is deleted from SHIFT, and the sender is notified that the file is no longer retrievable.
  - c. If the *Password ZIP file using Windows PKZIP* option has been selected, the sender should have sent you a password using a different communication channel. You will be prompted for the password before being able to retrieve the file/s. Note, this feature does not provide additional encryption during the file transfer, only some protection at the recipient's end after download.

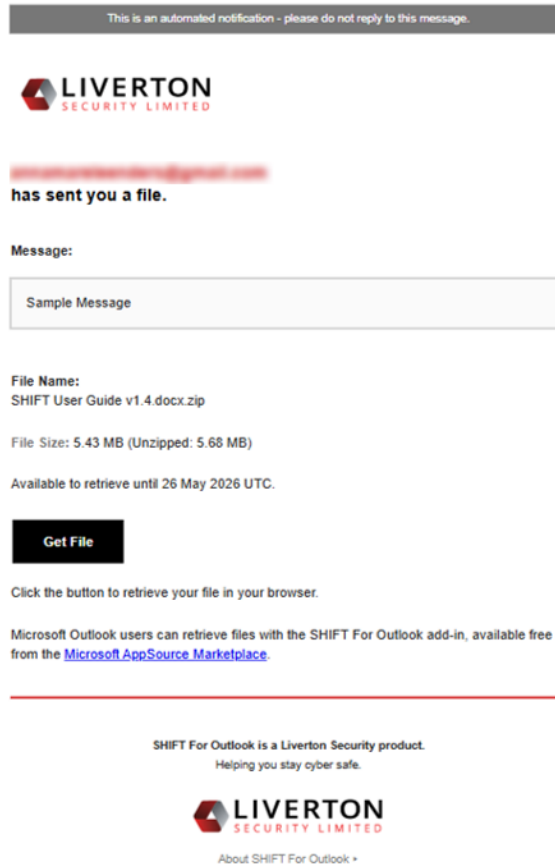


5. Once the above steps have been completed (with or without the optional choices), select *Send*. This file transfer will now be visible to the sender under the SHIFT Sent tab.

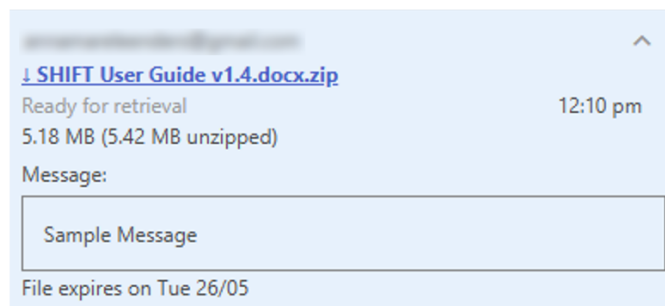
Note: Senders and recipients both receive notifications of the status of files in transit.

## 5.4 Retrieve Files

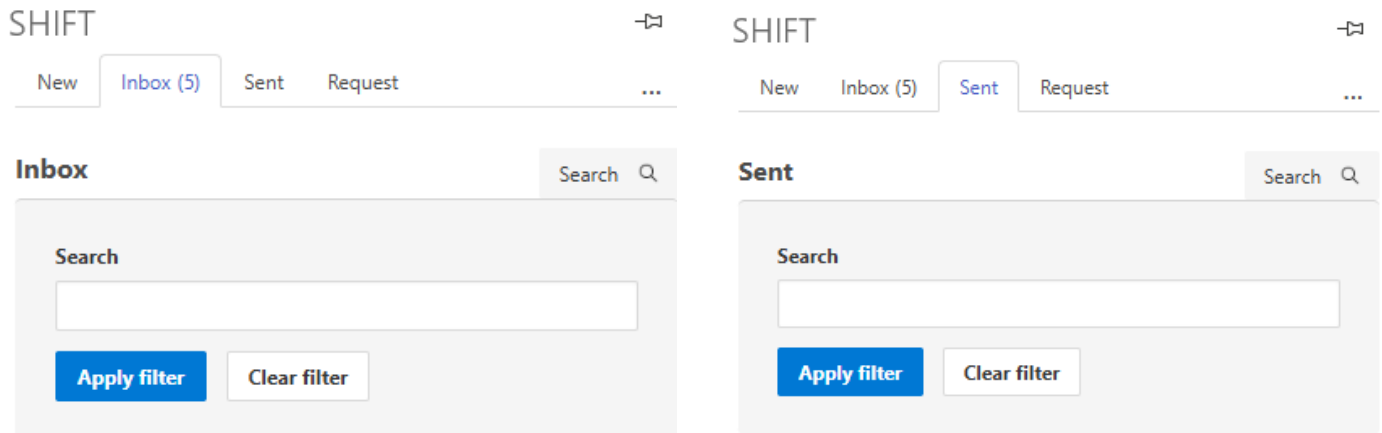
1. Recipients will receive an email notification that a file has been sent to them using SHIFT.



2. Select *Get File* to open SHIFT (refer to the [First Login](#) section) to see the file is *Ready for retrieval* under the Inbox tab.
3. The recipient can download the transferred zip file by clicking on the file name.
  - a. If the 'one time retrieve' option has been selected, the file transfer expires for a recipient after their initial retrieval. It can no longer be retrieved by that recipient again.
  - b. The file will also expire for all recipients after the specified retention period, regardless of whether the file has been retrieved or not. Email notifications are sent to both senders and recipients when this occurs.
6. The sender will be notified via email once the file has been retrieved by recipient.
7. The sender and recipient can view their file transfers under the Sent and Inbox tab, respectively.
  - a. Clicking on the dropdown arrow on the top right-hand side of the message will show additional transfer details, as seen below.



b. Select the dropdown *Filter* button to search for specific file transfers in the Inbox and Sent tabs.

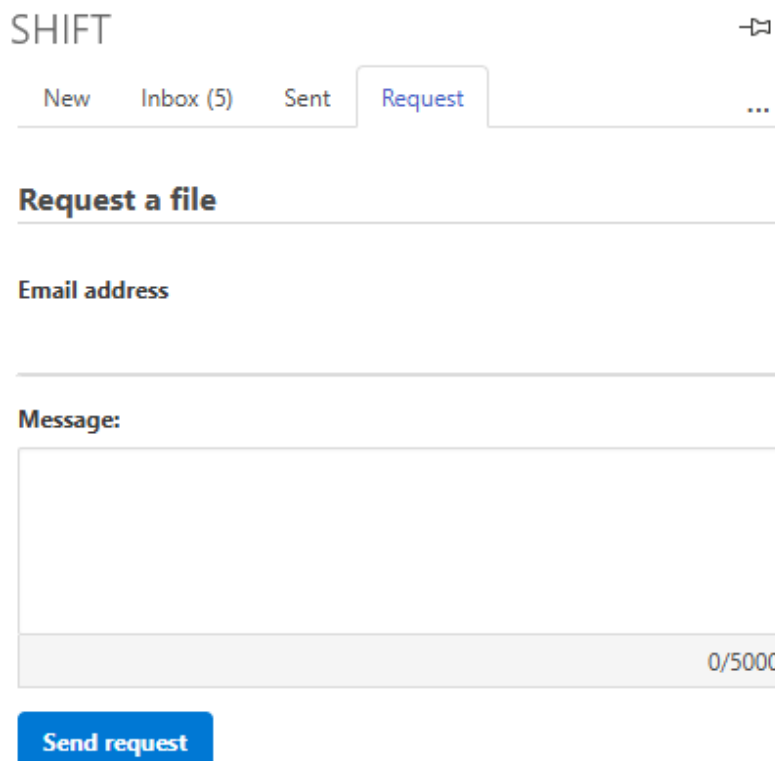


The search term can be the sender, file name, file status, or file size. After filling out the desired search term, select Apply Filter to view the resulting file transfers. Select Clear filter to return to a full file transfer list.

## 5.5 Request a file

SHIFT Organisation and SHIFT Premium users can request a file from any active email address. The recipient will automatically receive a SHIFT Public user account if they are not yet a SHIFT user. The file request enables the SHIFT Public user to send files to the SHIFT user that requested a file.

1. Navigate to the Request tab.
2. Enter the email address of the intended user.
3. There is an option to include a message for the user.
4. Select *Send request*.



The screenshot shows the 'Request a file' form in the SHIFT interface. The 'Request' tab is selected in the navigation bar. The form includes an 'Email address' field, a 'Message:' text area with a character count of '0/5000', and a 'Send request' button.