

ShareFile Workflows for the Modern Workforce

Learn how ShareFile empowers organizations to streamline collaboration and increase productivity.



Today's increasingly dynamic, distributed, and digitized mobile workforce demands instant access to the critical business information they need to do their jobs effectively and add value. The ability to securely exchange insights and collaborate on work documents is an essential component of enterprise productivity. Content collaboration and file sharing are at the core of hundreds of organizational workflows responsible for coordinating the people, processes, and technologies that drive daily business operations, including project plans, work orders, status reports, contract management, invoice processing, employee onboarding, and performance reviews.

Simplifying and Optimizing Work

Despite the urgent need for anytime, anywhere interaction, when workers initiate collaboration with colleagues and clients, they typically find themselves jumping back and forth between multiple apps and data repositories, and engaged in endless email chains involving numerous internal and external stakeholders. The resulting repetitive and inefficient circulation of documents with manual version control causes confusion, inaccuracy, and errors... and ultimately strangles productivity.

“Enterprise workers continue to spend an excessive amount of time on redundant tasks, with only 18 percent of their day dedicated to task delivery.”

– The Forrester Wave: Enterprise Collaborative Work Management (2016)

Modern enterprises must automate and streamline information flow, document management, work tasks, and business operations to propel productivity and maximize performance.

“Line of business executives and managers estimated that fully automating their document-driven business processes would yield a 36% increase in revenue, a 30% cost reduction, and a 23% reduction in risk.”

Driving Digital Transformation by Transforming Content-Centric Workflows
– IDC Community, March 2017

ShareFile Workflows: Work Faster and Easier

[Watch productivity skyrocket with workflows designed for every essential business activity.](#)

Citrix ShareFile is evolving from a basic sync and share tool to a platform that supports all document-centric tasks and workflows required by the modern enterprise. ShareFile's simple, secure, and seamless workflows enable anytime, anywhere, and any device access while meeting the organization's requirements for security, manageability, and compliance. ShareFile provides real-time secure mobile access to critical business information, enabling instant collaboration and increased productivity across distributed enterprise teams. Collaboration is built around defined workspaces to achieve specific tasks and objectives. A single solution supports business requirements for secure file sharing, document collaboration, and activity workflows.

“Workers are dealing with and processing more information than ever. They need a way to have transparency into what other team members are doing, in ways that are faster and more efficient.”

Designing the employees’ experience around a centralized document workflow is central to improving everyday productivity and cutting the clutter, while also bringing in operational efficiency with a direct impact on the bottom line. ShareFile delivers the tools to meet the dynamic needs of today's mobile workforce:

- Feedback & Approval document workflows
- Legally binding electronic signature

Feedback & Approval Document Workflows

Streamlined Processes

When you need to run an important file by a client or coworker, is there anything worse than getting a long confusing email in response? How about no response at all? It should not be so difficult to facilitate precise, timely collaboration on work documents. ShareFile manages the process with one easy-to-use tool so you can get more done faster and easier.

The Feedback and Approval Document Workflow is an all-in-one document collaboration solution designed for a secure structured workspace. Designated contributors can leave comments directly in shared documents. ShareFile automatically notifies and reminds participants as deadlines approach.



Approval In Progress

Overview Activity Annotations

Initiated by:
MC Michelle Chin

Approver(s):

HD Henry Diver	In Progress 10/11/2016, 10:03 PM
YH Yuki Hayashi	Requested Change 10/11/2016, 10:11 PM

Due date:
11/10/2016

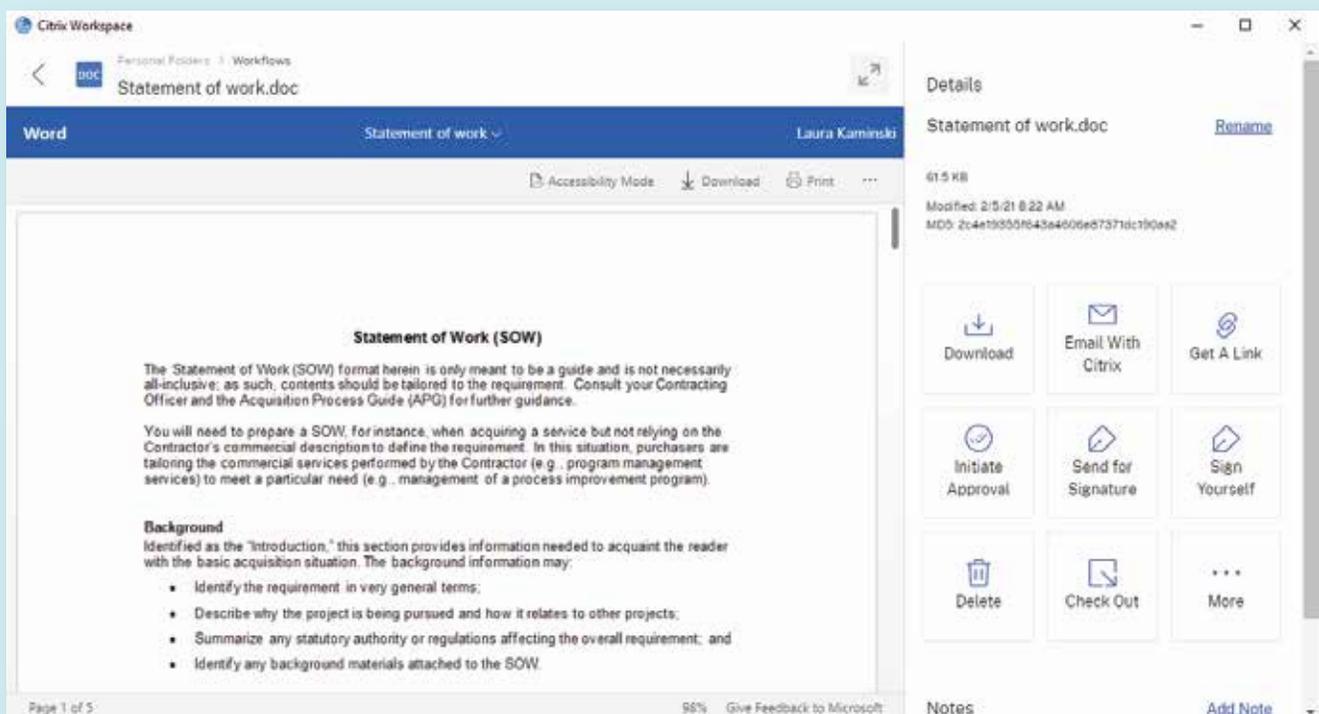
How It Works

1. Choose file and who needs to review it
2. Initiate document workflow in ShareFile
3. Share document via link for feedback or approval
4. Set due dates
5. Add approvers
6. Receive comments directly in ShareFile document
7. Review and resolve annotations in browser
8. Edit document
9. Upload edited files for final approval
10. Notify approvers and signers of new version
11. Obtain approvals and execute legally valid e-signatures (with CitrixRightSignature)

Features and Benefits

- **One-Click Actions:** Instantly request or provide feedback to/from colleagues, business partners, and clients within a shared document or file.
- **Automated Notifications:** Project team members receive reminders for review and approval requests, and instant notifications regarding document approvals.

- **Version Control:** Collaborators can track document changes across multiple data sources and devices. All editing can be done in ShareFile; no document downloads required. Real-time tracking of changes and versions continually updates document status.
- **Electronic Signature:** Users can automatically send documents for feedback, approval, and electronic signature directly from ShareFile; no need for bulky email attachments.
- **Document Management:** Safe exchange of internal and external-facing documents, including contracts, proposals, training tools, onboarding paperwork, performance reviews, marketing collateral, sales presentations, and product information, with a single solution.
- **Streamlined Collaboration and Increased ROI:** Pinpoint feedback, simple and secure version control, and streamlined approval management in an all-in-one structured workspace.



Citrix ShareFile: Built for Business and Trusted by IT

Integrated Solution for File Sharing, Document Collaboration, and Operational Workflows

As a leader in virtualization and mobility, Citrix protects the world's most sensitive information, simplifying and verifying the security and sharing of data in corporate apps and documents across locations, networks, and devices. Organizations can ensure the appropriate level of access for every individual and situation with visibility and control to address privacy, compliance, and risk management priorities without compromising end-user productivity.

More than 25 million business users and 80,000 customers rely on the robust collaboration capabilities delivered by ShareFile. Meet the mobility and collaboration needs of business users and the data security requirements of the business without interrupting critical daily workflows. Empower employees to work smarter, and help your business achieve agility and flexibility to capitalize on emerging opportunities and stay ahead of the competition. Mobilize data, streamline workflows, and enhance security with Citrix ShareFile.

Gartner Names Citrix a “Leader” in the Content Collaboration Platforms Magic Quadrant

Gartner's Magic Quadrant is based on both the completeness of vision and the ability to execute on it. Recognizing a shift in the cloud and content management markets, Gartner has removed its categories of EFSS and Enterprise Content Management (ECM) for 2017. Instead, the 2017 Gartner Magic Quadrants examine companies in the Content Collaboration Platforms, Content Services Platforms and Digital Experience Platforms spaces. Today's Content Collaboration Platforms like Citrix go beyond EFSS to also facilitate team collaboration and content workflows.

We are honored to be named in the leaders quadrant for Content Management Platforms. Through innovation, Citrix continues to empower our customers to reimagine the way work gets done with the secure deliver of apps and data in a highly consumable way.

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