



TitanFile for Administrators

Quick Start Guide for Managing Your Subscription



About this guide

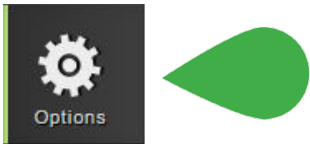
This Quick Start Guide contains all of the information you need to start managing your TitanFile subscription.

Not all features in this guide may be enabled by default. If you're missing any features, please [contact us](#).

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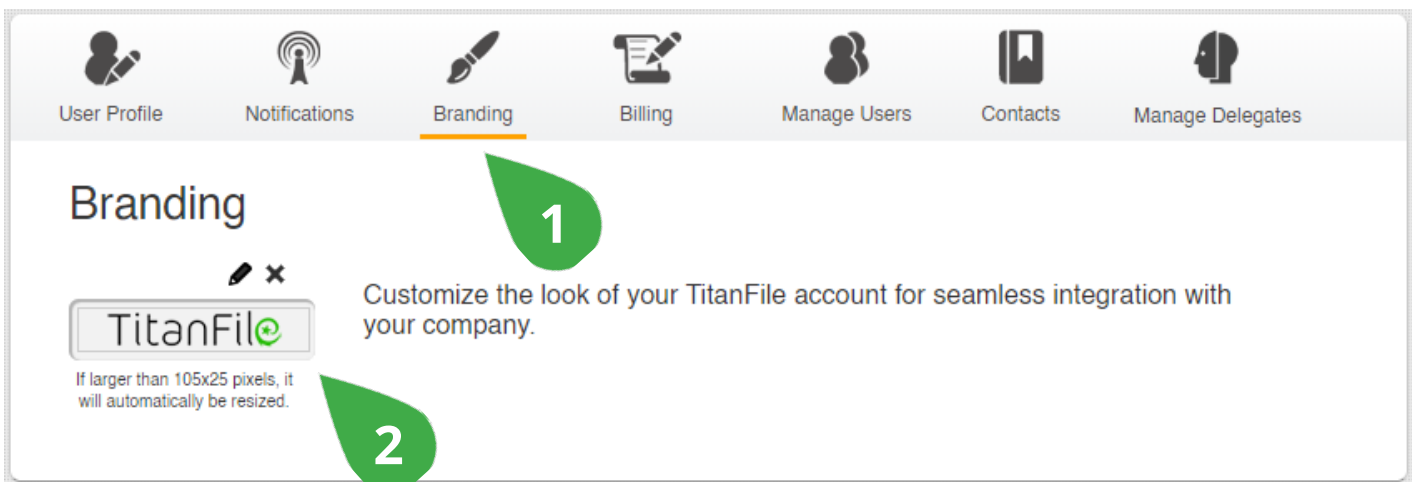
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Note: The following actions in this guide can all be done through your Options tab in the left panel of TitanFile.



1 Setting your branding logo

Go to the Branding tab. Click on the existing logo (TitanFile) and choose your company logo from your computer. The optimal size is 105px by 25px (w x h).

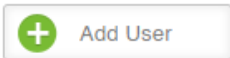


TitanFile offers other custom branding options. Learn more [here](#).

2 Managing subscription licenses


Go to the **Manage Users** tab to find information on how many licences you have used and how many are still remaining.

The screenshot shows the 'Manage Users' interface. At the top, there is a navigation bar with icons and labels for 'User Profile', 'Notifications', 'Branding', 'Billing', 'Manage Users' (which is underlined and highlighted), 'Contacts', and 'Manage Delegates'. Below this, the main content area is titled 'Manage Users'. On the left, there is a green callout pointing to a '+ Add User' button. To the right of this button, text indicates 'You are using 4 of 100 licences. You can add 96 more users.' Below this, there is a list of users. The first user is 'Stephen (Administrator)' with a profile picture and 'Last activity: 12 minutes ago'. Below that is a 'Members' section with a search bar labeled 'Search members...'. The members list includes three entries: 'Andrei Wu' (awu@titanfile.com, last activity: December 30, 2019 3:01 pm), 'Martina Hernandez' (mhernandez@titanfile.com, last activity: December 30, 2019 2:00 pm), and 'Rebecca Hemingway' (rhemingway@titanfile.com, last activity: December 30, 2019 4:23 pm). Each member entry has a profile picture, name, email address, and last activity timestamp, along with icons for profile and edit.

To assign a license to a new member, Click  and fill in the new member's name and email address. They will receive a notification in their email to confirm their information.

To remove a member from your subscription, click on the pencil icon next to the member and then click on the **Remove Member** button.

Members

Search members... 



Andrei Wu
awu@titanfile.com
Last activity: **December 30, 2019 3:01 pm**










Martina Hernandez
mhernandez@titanfile.com
Last activity: **December 30, 2019 2:00 pm**



Rebecca Hemingway
rhemingway@titanfile.com
Last activity: **December 30, 2019 4:23 pm**




User Profile Notifications Branding Billing Manage Users Contacts Manage Delegates

Manage Users · Edit Member

Andrei Wu



First name

Last name





Email

Subscription Rights ⓘ

Channel Rights ⓘ

Save Cancel

Member Actions

-  Reset Password
-  Impersonate Member
-  Transfer Channels (25)
-  Remove Member













To add more licenses to your subscription, please [contact us](#).

3 Managing subscription members

To manage a subscription member, click on the pencil icon next to a member in the **Manage Users** tab. This will bring you to the **Edit Member** view.

Members

Search members... 


	Andrei Wu awu@titanfile.com Last activity: December 30, 2019 3:01 pm	 
	Martina Hernandez mhernandez@titanfile.com Last activity: December 30, 2019 2:00 pm	 
	Rebecca Hemingway rhemingway@titanfile.com Last activity: December 30, 2019 4:23 pm	 

Edit Member view

User Profile Notifications Branding Billing Manage Users Contacts Manage Delegates

Manage Users › **Edit Member**

Andrei Wu



First name

Last name

Email

Subscription Rights ⓘ

Channel Rights ⓘ

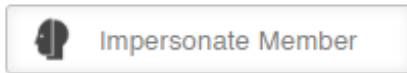
Member Actions

-
-
-
-



Triggers a password reset email to the member.

Note: This button will not show if you have SSO enabled.



Allows you to [impersonate](#) the member's account.



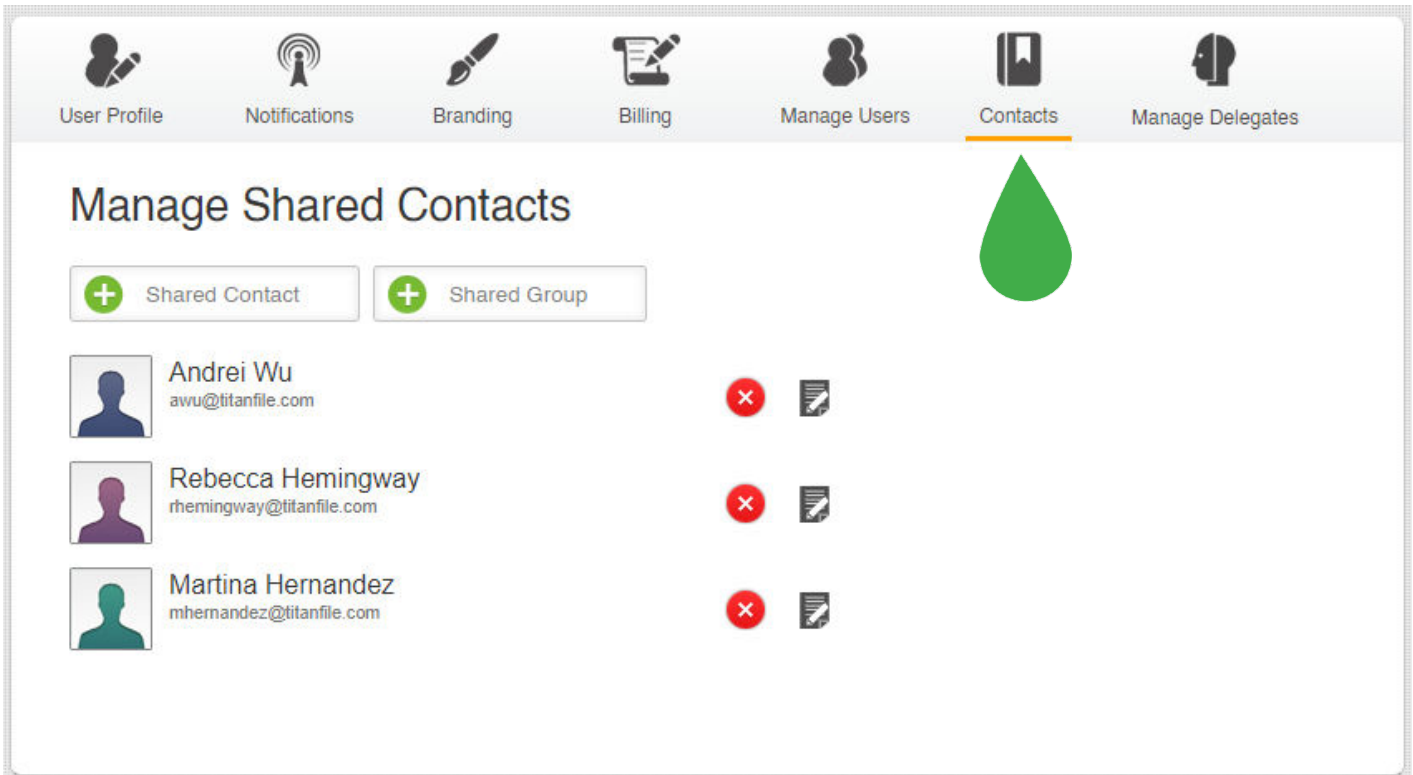
Transfers all of the member's channels to another member.

Subscription Rights gives the member administrative rights to the subscription to the subscription. These rights include managing subscription members, shared contacts, and the other features included in this guide. [Learn more.](#)

Channel Rights allows the member to have channel owner rights to all channels they are a part of. These rights include adding and removing contacts, organizing channel files, changing channel options, and exporting channel reports. [Learn more.](#)

4 Managing shared contacts

Shared contacts show up in the contacts list of all of your members. You can manage shared contacts in the **Contacts** tab.



To add a new shared contact, click and fill in the contact's name and email address.

You can also create shared groups to organize a set of contacts into folders. To create a shared group, click and set a name for the group. The shared group will show up on the list and you can simply drag and drop shared contacts into the shared group folder.

5 Power features

Single Sign-On (SSO) - TitanFile is compatible with ADFS, AWS Directory Service, Azure AD, and any identity federation service that supports SAML to provide single sign-on (SSO) capability to users within your organization. [Learn more.](#)

Two-factor Authentication (2FA) - For an extra layer of security, TitanFile provides the option of two-factor authentication for every contact added to a channel. [Learn more.](#)

Export Global Audit Trails - You can view or download detailed reports and activity logs providing you with a record of file history, channel activity and contact reports on the subscription. [Learn more.](#)

Delegation - As a TitanFile administrator, you can delegate into any managed user's account or allow a managed user to delegate into another managed user. [Learn more.](#)

For more information, please visit:

support.titanfile.com

www.titanfile.com

Support Hours:

Monday - Friday: 9:00AM - 6:00PM

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TitanFile 

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