



Marsh – Secure File Transfer and Workspaces

For External Client Access



User Guide
March 2020

What is Marsh Secure File Transfer and Workspaces

- **Secure File Transfer**

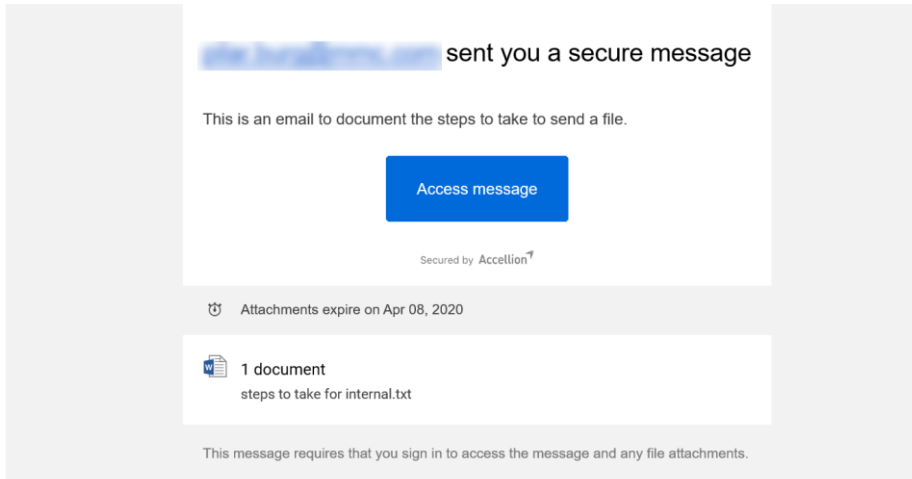
- Enables the simple and secure transfer of files between Marsh and its clients. The Secure File Transfer system uses email to notify Marsh's client contact that a file(s) is waiting for download and provides a link allowing the contact to download the file using a web browser.
- The client contact is required to authenticate with a password, and one time verification code, in order to access the files.

- **Workspaces**

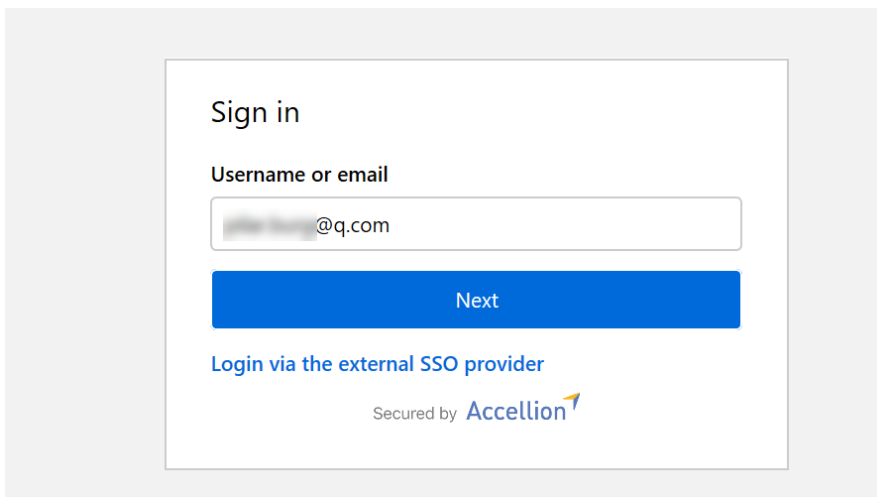
- Provide a secure location to host project files for collaboration between Marsh and an external client.
- The Marsh's client contact will be notified via email that a file(s) is waiting for collaboration and provides a link allowing the contact to access the file using a web browser.
- The client contact is required to authenticate with a password, and one time verification code, in order to access the files.

First Time Logging into Secure File Transfer

- As a recipient of a file, you will receive an email indicating that you have a file to download.
- Within the body of the email, click on the “Access message” button.



- Follow the following step for first time registration
- Enter your email address in the “Username or email” field and click on “Next”



- Create password, following the listed guidelines, and click on “Create account”

Create account

Already a kiteworks user? [Sign in](#)

Email

.....@q.com

Password

..... ✓

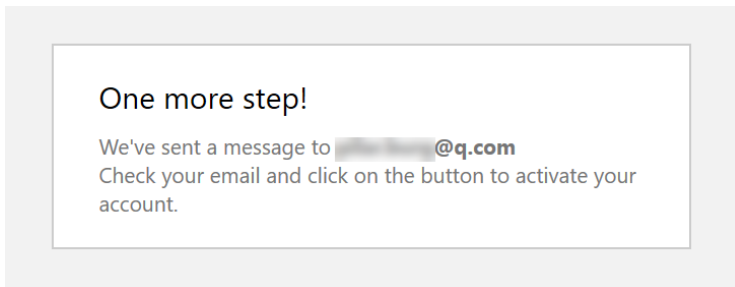
Confirm Password

..... ✓

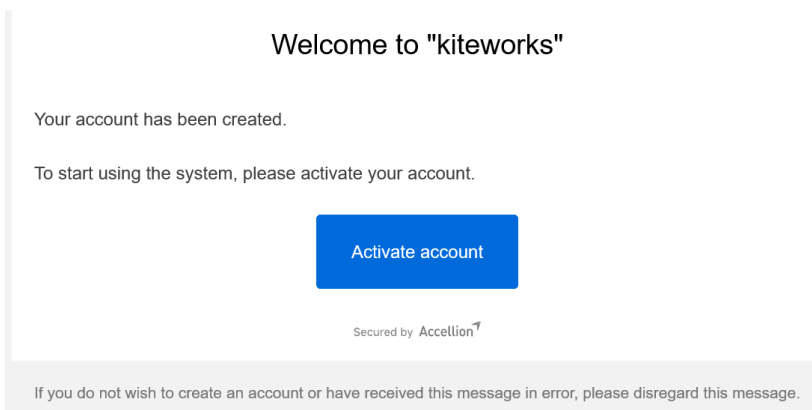
- ✓ 1 number
- ✓ 1 lowercase character
- ✓ 1 uppercase character
- ✓ 1 special character
- ✓ 15 characters minimum

Create account

- Once password is created, a notification will display indication that a verification email will be sent in order to complete the user id creation.



- Check your email for the verification email. The email will be sent by the address USdatatransfer.Support@mmc.com.
- Once located, click on the “Activate account” button



- You will be redirected to the website in order to complete login steps.
- Enter your email address in the “Username or email” field and click on “Next”

Sign in

Username or email

Next

[Login via the external SSO provider](#)

Secured by Accellion

- Enter your password and click on “Sign in”

Sign in

Username or email [Not you?](#)

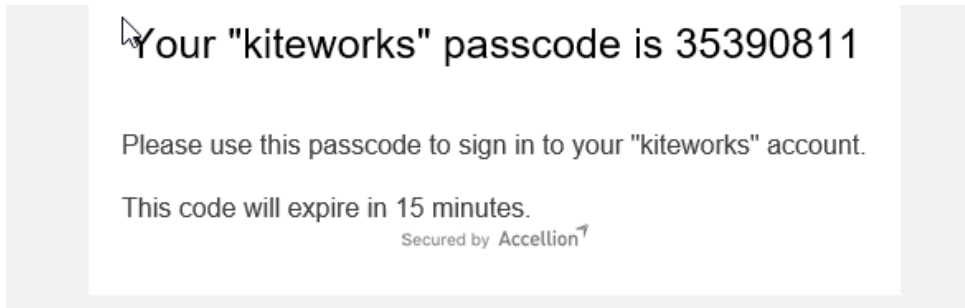
Password

Sign in

[Forgot password?](#)

Secured by Accellion

- A one-time passcode will be sent to you via email. The passcode is valid for 15 minutes.

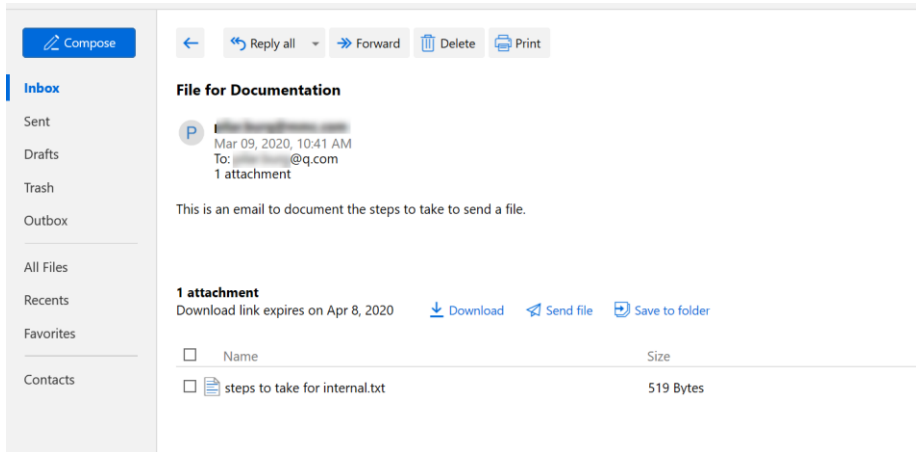


- Enter the eight digit passcode, from the email into the "Passcode" field and click on "Sign in".

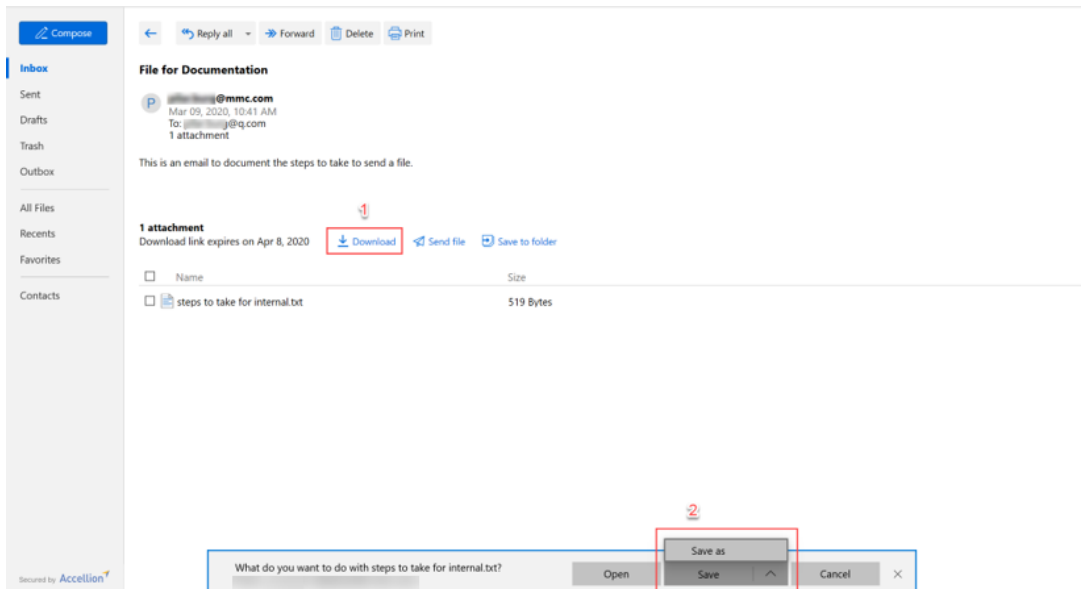
A "Two factor authentication" form. It states "A message with a passcode was sent to your email." Below this is a "Passcode" label and a text input field containing "35390811". A blue "Sign in" button is below the input field. At the bottom, it says "Didn't get the passcode?" followed by a blue "Resend" link.

Downloading File From Secure Message

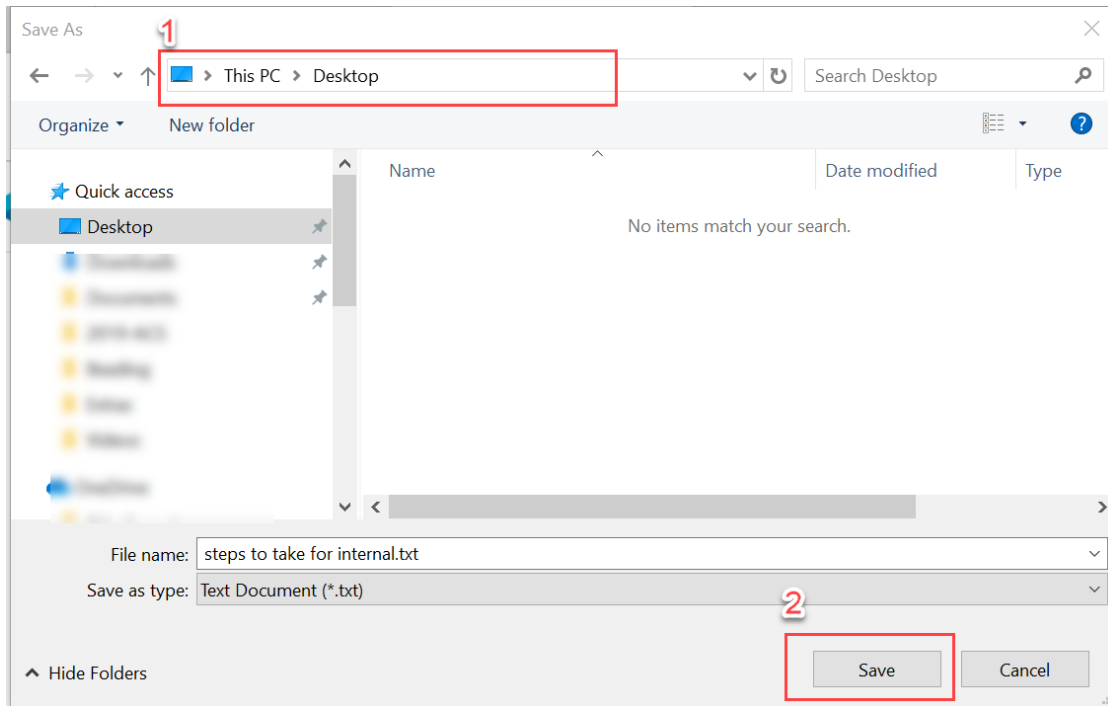
- Once the authentication process finishes, the message you were sent will be opened



- Click on the "Download" button then choose "Save As" from the pop up at the bottom of the screen.

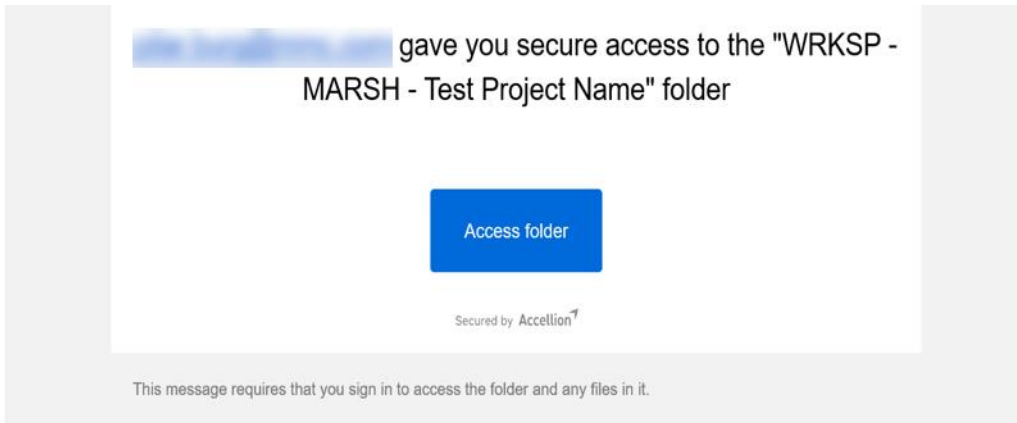


- Navigate to the folder where you would like to save the file and click on “Save”

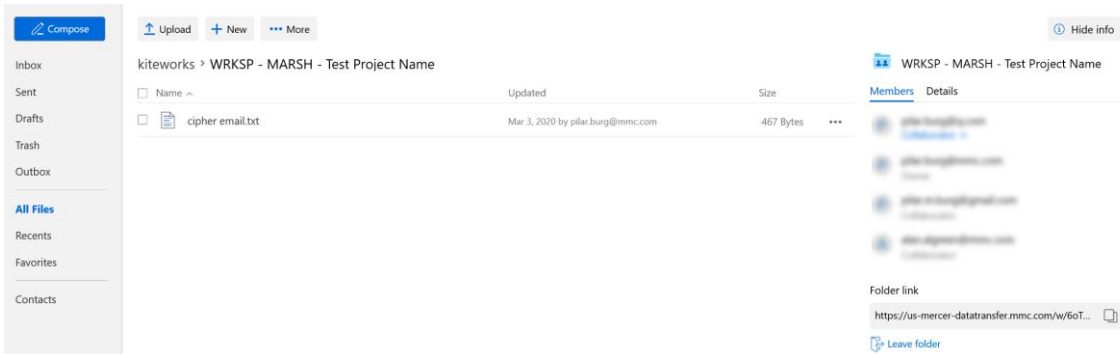


Workspaces – For File Collaboration

- As a recipient of a file, you will receive an email indicating that you have been invited to a Workspace.
- Within the body of the email, click on the “Access folder” button.



- Go through the login steps, listed above, and then you will be taken to the Workspace.
- Workspaces can also be accessed via the “All File” option on the right side of your home screen.



- Once inside the Workspace, you can do the following:

Upload a file: Click the “Upload” button, choose the file from your PC and click “Open”

Download a file: Check the box next to the needed file, click “Download” button, choose a location your PC to save the file and click on “Save”.