



Informatica® Managed File Transfer  
10.2.3

# File Transfer Portal Guide

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# Preface

Use the *Informatica File Transfer Portal Guide* to learn how to perform the operational tasks available in the File Transfer Portal. Learn how you can perform file transfers and file sharing with Managed File Transfer through your browser. You can also learn how to view your audit activity on the Managed File Transfer file server.

## Informatica Resources

Informatica provides you with a range of product resources through the Informatica Network and other online portals. Use the resources to get the most from your Informatica products and solutions and to learn from other Informatica users and subject matter experts.

### Informatica Network

The Informatica Network is the gateway to many resources, including the Informatica Knowledge Base and Informatica Global Customer Support. To enter the Informatica Network, visit <https://network.informatica.com>.

As an Informatica Network member, you have the following options:

- Search the Knowledge Base for product resources.
- View product availability information.
- Create and review your support cases.
- Find your local Informatica User Group Network and collaborate with your peers.

### Informatica Knowledge Base

Use the Informatica Knowledge Base to find product resources such as how-to articles, best practices, video tutorials, and answers to frequently asked questions.

To search the Knowledge Base, visit <https://search.informatica.com>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at [KB\\_Feedback@informatica.com](mailto:KB_Feedback@informatica.com).

### Informatica Documentation

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If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at [infa\\_documentation@informatica.com](mailto:infa_documentation@informatica.com).

## Informatica Product Availability Matrices

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## Informatica Velocity

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You can find Informatica Velocity resources at <http://velocity.informatica.com>. If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at [ips@informatica.com](mailto:ips@informatica.com).

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You can contact a Global Support Center by telephone or through the Informatica Network.

To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link:

<https://www.informatica.com/services-and-training/customer-success-services/contact-us.html>.

To find online support resources on the Informatica Network, visit <https://network.informatica.com> and select the eSupport option.

# CHAPTER 1

## Welcome

The File Transfer Portal in Managed File Transfer provides you with the ability to perform multiple types of file transfers and file sharing through your browser. No additional software is required on your computer, and all popular browsers are supported including Internet Explorer and Chrome.

The file transfer modules provided within the File Transfer Portal are named Shared Drive, Secure Folders and Secure Mail.

## Shared Drive Features

Shared Drive is a secure file system that provides Enterprise File Synchronization and Sharing (EFSS) services for authorized users. With Shared Drive, files and folders can be easily shared between users with advanced collaboration features including file revision tracking, commenting, trash bin, media viewing and synchronization with Windows devices. Shared Drive provides the following features for users:

- Access files and folders on Shared Drive through an intuitive browser interface
- Drag-and-drop files and folders from the desktop to the Shared Drive server
- Synchronize files with Windows devices
- Share files and folders with other users
- Specify granular permissions (e.g. read only, edit, etc.) for shared folders and files
- Receive automatic email notifications when shared folders and files are accessed by others
- View images and PDF files through the browser using the Media Viewer
- Add comments to files and folders
- Search for files or folders
- Keep file revisions, with the ability to restore previous versions
- Lock files to temporarily restrict access
- Restore files from the Trash Bin
- Send download-only links through the optional Secure Mail module
- Copy files from Shared Drive to Secure Folders



# Secure Folders Features

Secure Folders provides browser access to authorized files and folders on the server. With Secure Folders, files can be transferred quickly between the desktop and server over HTTPS protocol. Since files in Secure Folders are stored on a standard file system, they can be directly accessed by back-end applications and programs. Secure Folders provide the following features for users:

- Access files and folders on the server through an intuitive browser interface
- Drag-and-drop files and folders from the desktop to the server
- Send download-only links through the optional Secure Mail module
- Copy files from Secure Folders to Shared Drive

# Secure Mail Features

Secure Mail allows authorized users to send messages and files as secure "Packages" on an ad-hoc basis. Recipients will get an email with a unique link to each package, allowing them to download the message and files through a secure HTTPS connection. This is a great alternative to regular email since there are no file size or file type restrictions. Secure Mail provides the following features for users:

- Send sensitive messages and files to one or more recipients as a secure Package
- Attach multiple files with no size limits
- Set expiration dates and maximum downloads
- Optionally password-protect Packages
- Optionally receive email notifications when Packages are opened by recipients
- View audit trails of all activity
- Receive reply messages with attachments from your recipients
- A Microsoft Outlook plugin is also available for sending Secure Mail directly from the Outlook Compose page.

# Technical Requirements for the File Transfer Portal

- Cookies and Javascript should be enabled within your browser for the File Transfer Portal to function properly.
- Some options may open secondary windows. Popups should be allowed for this site.

# Accessing the File Transfer Portal

- ▶ To access the File Transfer Portal, type the URL `https://<hostname>:<https-portnumber>/portal` into your browser, where `<hostname>` is your hostname, and `<https-portnumber>` is the HTTPS port number you specified when you installed Informatica Managed File Transfer.

## CHAPTER 2

# File Transfer Portal Login

The login page prompts for a user name and password to access the File Transfer Portal interface.

The following options may be provided on the login page:

### User Name

The user name of the account.

### Password

The corresponding password for the user account.

### Forgot Password?

If enabled, a link is provided to request a password reset. Click the **Forgot Password** link to proceed with the reset process. For more information, see ["Password Assistance" on page 11](#).

### Create Account

If enabled, a link is provided to create a new account. Click the **Create Account** link to begin the self-registration process. For more information, see ["Self-Registration" on page 12](#).

**Note:** The login page only appears if password authentication is required. If your account is configured for certificate authentication, you will go directly to the dashboard (if the certificate is valid).

## Password Assistance

To reset your password, click the **Forgot Password?** link from the Login page. Then complete the requested information and click **Submit**.

**Note:** Capitalization is not required when typing the characters from the image. If you cannot distinguish the letters and numbers in the image, click the Try a different image link.

## Create New Password

An email with a password reset link will be sent to the email address registered to the user account. Click the link and verify your user name, then create a new password.

## Self-Registration

If you are not already registered, follow these steps to create a new user account.

1. Select to create an account and enter your email.
2. Verify your email.
3. Complete registration.

### Step 1 - Enter Email

Click the **Create Account** link on the File Transfer Portal login page. Specify your email address and the characters shown in the image. Click **Next** to continue.

**Note:** Capitalization is not required when typing the characters from the image. If you cannot distinguish the letters and numbers in the image, click the Try a different image link.

### Step 2 - Verify Email

An email will be sent to you with the verification code. Copy and paste the code into the field and then click **Next** to continue.

### Step 3 - Complete Registration

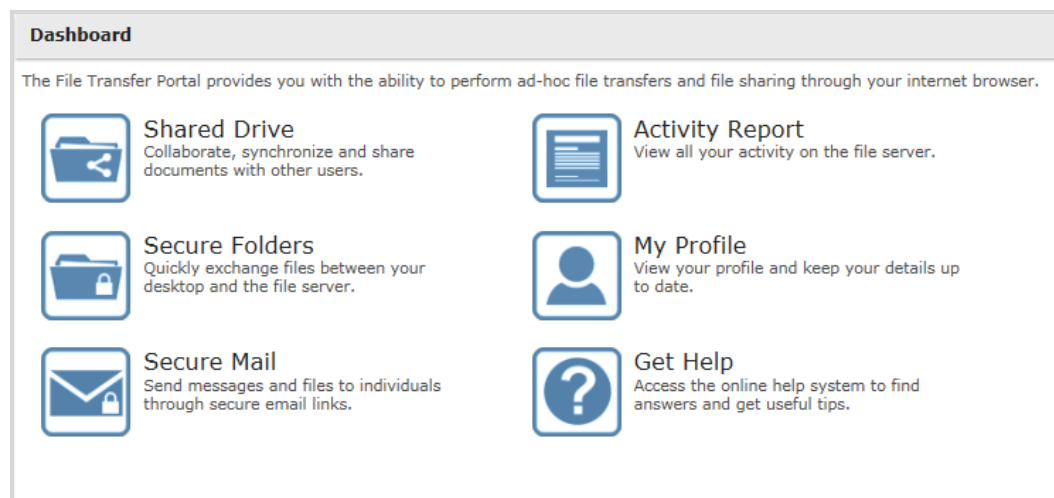
Complete the required information in the Registration form. You may be prompted to provide your user name and password for an existing network. Otherwise, you may be prompted to create a new user name and password.

## CHAPTER 3

# Dashboard

The dashboard is displayed after login. The dashboard provides menus and links to quickly access components within the File Transfer Portal. All components are available from the main menu bar.

The following image shows the File Transfer Portal Dashboard:





The Dashboard contains the following components:





### Main Menu Bar

To access a component, select it from the main menu bar.

### Quick Links

Launch popular components by clicking a corresponding Quick Links icon.

Icon	Component Description
	Shared Drive is a secure file system that provides Enterprise File Synchronization and Sharing (EFSS) services. With Shared Drive, files and folders can be easily shared between users with advanced collaboration features including file revision tracking, commenting, trash bin, media viewing and synchronization with Windows devices. For more information, see <a href="#">Chapter 4, "Shared Drive" on page 15</a> .
	Secure Folders provides browser access to authorized files and folders on the server. With Secure Folders, files can be transferred quickly between the desktop and server over HTTPS protocol. Since files in Secure Folders are stored on a standard file system, they can be directly accessed by backend applications and programs. For more information, see <a href="#">Chapter 6, "Secure Folders" on page 34</a> .

	<p>Secure Mail allows you to send messages and files as secure "packages" on an ad-hoc basis. Recipients will get an email with a unique link to each package, allowing them to download the message and files through a secure HTTPS connection. This is a great alternative to regular email since there are no file size or file type restrictions. For more information, see <a href="#">Chapter 5, "Secure Mail" on page 25</a>.</p>
	<p>View all audit activity for your user account including logins, logouts, file uploads and downloads. For more information, see <a href="#">Chapter 8, "Activity Report" on page 39</a>.</p>
	<p>View your profile and keep your details up to date. For more information, see <a href="#">Chapter 7, "My Account" on page 38</a>.</p>
	<p>Having an issue? Consult the help system to get the answers you need.</p>

**Note:** If one or more of these components do not appear on your dashboard, then you may not have permissions to those components. Contact your administrator for assistance.

## CHAPTER 4

# Shared Drive

The Shared Drive module in Managed File Transfer is an on-premise Enterprise File Sharing & Synchronization (EFSS) service. All of your images, documents, videos, and sensitive files are stored on the Managed File Transfer server which your organization controls.

Anything you add to Shared Drive will automatically synchronize through the server and appear in each of your connected devices, as well as the File Transfer Portal, allowing you to access your files from any internet connected PC. Using Shared Drive, you can securely share files and collaborate with other team members or trading partners.

You can upload files by dragging and dropping them from your local desktop directly on to the Shared Drive page. Once a file is uploaded to the service, Shared Drive keeps track of each file revision, allowing you to restore a prior version of a file. You can temporarily lock your shared files to prevent users from making changes or deleting them. Comments can be added to files and folders to communicate to others or leave reminders for yourself. Files and Folders that are deleted can be restored from the trash bin.

The Shared Drive menu option is available if your account is authorized to use this feature. From the Shared Drive toolbar you can upload files, manage folders, use the media viewer to view image files and documents, view thumbnail previews of images, or search for files and folders.

## My Workspace

The My Workspace pane displays the Shared Drive directory structure. You can select a folder to display its contents, or move a file or folder by dragging it from Shared Drive and dropping it over a folder in the My Workspace pane.

The My Workspace pane also contains the Trash Bin and Shared Docs. For more information about the Trash bin, see [“Trash Bin” on page 23](#). Click the Trash Bin link to view the contents of the Trash Bin.

Click the Shared Docs link to view files and folders that are shared with other users. For more information about shared files, see [“Shared Docs” on page 19](#). The link will display the number of files or folders that have been shared with you and are waiting for your acceptance. For more information about accepting files, see [“Shared Docs” on page 19](#).

# Disk Usage

This area displays the amount of disk space you are using with Shared Drive. Disk usage includes all files and folders in your Workspace, files shared to you by others, and files located in the trash bin. Only the current revision of a file is included in your disk usage.


## Shared Drive

### Bread Crumbs


Click on the bread crumbs to navigate through your Shared Drive folders.

### Page Toolbar

The following actions are available from the page toolbar:

- Upload files to Shared Drive by clicking the Upload button and following the upload instructions. You can also upload files by dragging and dropping them directly on to the Shared Drive page. For more information, see [“Upload to Shared Drive” on page 24](#).
- Create a New Folder (under the existing folder). Type the name of the new folder and then click **Create**.
- Refresh the Shared Drive page in your internet browser.
- Open the Shared Drive Media Drive to view popular media file types. For more information, see [“Media Viewer” on page 18](#).
- Display the thumbnail preview in the selected image size.
- Search for files and folders in Shared Drive by typing in a whole word, partial word, or phrase into the search field. Then press Enter or click the  button to perform the search. The results of the search are displayed on the Search Results page. For more information, see [“Search Results” on page 22](#).


### Shared Drive Actions

The following actions are available by selecting the  Actions icon on files:

- Remove my Access allows you to remove your access from a file shared with you.
- Email Notifications allows you to select which events will trigger an email notification to be sent to you.
- Delete the selected file.
- Manage Access to the shared file.
- Share With allows you to share a file with another user. For more information, see [“Share File or Folder” on page 21](#).
- Send To allows you send a file using a Secure Mail message. For more information, see [“Compose” on page 26](#).
- Lock other users from making changes or deleting shared files.
- Unlock files to allow other users to make changes or delete shared files.









- Revisions allows you to restore files to a previously saved version. For more information, see [“Revisions” on page 19](#).
- Comments allows you to add a comment to a file.
- Rename a file. Type the new name in the dialog box and click the **Rename** button.
- Properties allows you to view attributes of the file.
- Copy to Secure Folders allows you to copy the file to a folder in Secure Folders.

The following actions are available by selecting the  Actions icon on folders:

- Delete a folder.
- Download the folder as a .ZIP file.
- Remove my Access allows you to remove your access from a folder shared with you.
- Manage Access to the shared folder.
- Email Notifications allows you to select the type of events that will trigger an email notification.
- Share With allows you to share a folder with another user. For more information, see [“Share File or Folder” on page 21](#).
- Send To allows you to send a folder in a new Secure Mail message. For more information, see [“Compose” on page 26](#).
- Comments allows you to add a comment to the folder.
- Rename a folder. Type the new folder name in the dialog box and click the **Rename** button.
- Properties allows you to view the attributes of the folder.
- Copy to Secure Folders allows you to copy the folder to Secure Folders.

## Shared Drive Quick Actions

The following actions are available by selecting a Shared Drive Quick Action:

-  Prohibit other users from making changes or deleting a shared file.
-  Comment on a file or folder.
-  Share a file or folder with another user.
-  Unlock a file to allow users to make changes to or delete the file.
-  The file or folder has a comment. Select the icon to view or add comments.
-  The file or folder is shared. Hover over the icon to see who can access it, or click on the icon to manage the sharing permissions.

## Footer Actions

The following actions are available when one or more items are selected from the table:

- Delete the selected files or folders to the Shared Drive Trash Bin. For more information, see [“Trash Bin” on page 23](#).
- Download the selected files and folders. The files or folders are downloaded as a .ZIP file to your browser's default download directory.





- Send the selected files to email recipients using Secure Mail. For more information, see [Chapter 5, “Secure Mail” on page 25](#).
- Copy the selected files or folders from Shared Drive to Secure Folders.

## Copy Files to Secure Folders

Shared Drive allows you to copy files from Shared Drive to Secure Folders. For more information, see [Chapter 6, “Secure Folders” on page 34](#).

### Page Toolbar

The following actions are available on the Select Target Secure Folder window:

- Navigate directly to a folder by specifying its path next to the Location field and then clicking the  icon in the toolbar.
- Move up a folder by clicking the  icon in the toolbar. If the icon is unavailable, you are in your home folder.
- Return to your home directory by clicking the  icon in the toolbar.
- Refresh the current folder by clicking the  icon in the toolbar.
- Select the action to take when a file exists in the Secure Folder.

## Media Viewer

The Shared Drive Media Viewer allows you to view, manage, and share media files.

The Media Viewer has the following sections:

#### Folders

Use the Folders pane to navigate through your Shared Drive directory.

#### Media Files

The Media Files pane lists the files located in the folder that is selected in the Folders pane. Click on a file to preview it.

#### Properties

The Properties pane displays the dates the file was created or modified, the user who created or last modified the file, and the file size.

#### Comments

Displays comments you or others have added to the file. Click the **Write a Comment** link to add a new comment.

### Previous and Next

Use the Previous and Next buttons to navigate through the files.


### Download

Download the current file to your local computer.


### Delete

Delete the current file to the Trash Can. .

### Send To

Send a Secure Mail message by clicking the  icon.

### Share With


Share a file with another user by clicking the  icon. The Shared File page appears.

### Exit

Closes the Media Viewer and returns you to Shared Drive.

## Revisions

Shared Drive saves a file snapshot every time a new version of a file is uploaded or saved from the File Transfer Portal or desktop sync client. Previous file revisions can be restored.

1. Select a file from Shared Drive and then click the  icon.
2. Select **Revisions**. The Revision History window appears.
3. Select a previous revision from the list. The selected revision becomes the most current, and will be given a new revision number.


## Shared Docs

The Shared Documents page allows you to manage files and folders shared with you or other users. You can accept or decline items shared with you, manage a Web User's sharing role, or remove access to items you have shared with others. You can also manage the email notifications you receive when specified events are triggered.

To access the Shared Docs page, log in to the File Transfer Portal, select **Shared Drive** from the main menu bar, and then select the **Shared Docs** link from the Workspace.


## Accept or Decline a File or Folder Shared with You

Use the following instructions to Accept or Deny a file that was shared with you by another user.

1. Click the  icon next to the shared file or folder.
2. Choose Accept or Deny. Files and folders that you accept will appear in the root folder of your Shared Drive workspace.

## Remove Your Access From a Shared File or Folder

Use the following instructions to remove your access from a file or folder shared with you.

1. Click the  icon next to the shared file or folder.
2. Choose Remove My Access. The file will no longer be shared with you.

## Manage a User's Role



When you share an item with other recipients, you will specify the Role to grant to those user(s). The Role controls what actions the user(s) can perform on the item. For instance, a user may only be granted a role to View or Download a file without the ability to change it.

A user that has the Editor or Owner role on an item can manage the roles for other users on this item. When sharing a file or folder, a user cannot grant a higher Role (with more permissions) than the current role they have for the item.

Example



Tom uploads a file and his role is Owner. Tom shares the file to Kathy and grants her the role of Editor. When Kathy shares the file to Rick, she can only grant him Editor, Contributor, or Viewer access.

Use the following instructions to manage a user's permission level to a file or folder you shared.

1. Click the  icon next to the shared file or folder.
2. Choose Manage Access. The Manage Access page appears.
3. Click the  icon next to the user who has access to the file.
4. Choose Manage Role. The Manage Role window appears.
5. Select the Role the user will have on the file or folder.
6. Click Update to save your change.



## Remove Access From Another User

Use the following instructions to remove user access to a file or folder you shared.

1. Click the  icon next to the shared file or folder.
2. Choose Manage Access. The Manage Access page appears.
3. Click the  icon next to the user who has access to the file.
4. Choose Remove Access. The item will no longer be shared with the user.


## Invite More Users to the Shared Item

Use the following instructions to invite more users to the shared item.

1. Click the  icon next to the shared file or folder.
2. Choose Manage Access. The Manage Access page appears.
3. Click the  **Invite More Users** button. The Shared File Screen appears.
4. Fill in the appropriate fields and then click **Share**.

## Configure Email Notifications

Use the following instructions to manage your email notifications for shared items.

1. Click the  icon next to the shared file or folder.
2. Choose Email Notifications. The Email Notifications page appears.
3. Select the type of event that will generate an email notification to you.
  - Download - when a user downloads a file you have shared
  - Upload - when a user uploads a new revision of the shared file
  - Comment - when a user adds or removes a comment on a shared file or folder
  - Delete - when a user deletes a file or folder you have shared with them
4. Click Save.


## Share File or Folder

The Share File and Share Folder pages allow you to share items with other users. When sharing files and folders, you can select the access levels you will grant the user(s) you are sharing a file with. You can configure email notifications that alert you when specific sharing events occur.

The Share File page contains the following properties:

### To

The email address of the recipient(s). The email address can be the standard email address or it may also include the name of the recipient, for example: Andrew Thomas <athomas@example.com>.

Separate multiple email addresses with commas. Click the  button to select email recipients or groups from the address book. For more information, see ["Address Book" on page 30](#).

### Subject

The subject of the email to send to the recipient(s). The maximum length of the subject line is 255 characters.

### Message

The message that will be shown to the recipient(s) when they receive the notification. The message is optional.

### Assigned Role

Select the file and folder permissions you will grant the user(s) you have shared the item with. Permissions include:

### Viewer

Can view and download the shared item.

### Contributor

Can view, download, edit and add comments to the shared item.

### Editor

Can view, download, edit, add comments, lock, rename, delete and share the item with others.

**Owner**

Has full access to the shared item, including the ability to manage file locks and shared access.

**File or Folder**

The name of the file or folder that is being shared.

**Email Notifications**

You can receive email notifications when users take specified actions with the shared file or Folder.

**Download**

when a user downloads a file you have shared

**Upload**

when a user uploads a new revision of the shared file, or uploads a new file to the shared folder

**Comment**

when a user adds or removes a comment on a shared file or folder


**Delete**

when a user deletes a file or folder you have shared with them

## Search Results

The Search Results page displays the files and folders that were found for the criteria specified in the search.


### Search


Type in whole word, partial word, or phrase to find files and folders stored in Shared Drive. Press Enter or click the  button to perform a search.

### File Actions

The following actions are available for files:

- View or Download a file by clicking the file name.

More file actions are available by clicking the  icon.


- Delete the selected file.
- ShareWith allows you to share a file with another user. For more information, see [“Share File or Folder” on page 21](#).
- SendTo allows you send a file using a Secure Mail message. For more information, see [“Compose” on page 26](#).
- Lock other users from making changes or deleting shared files. A  icon appears next to locked files.
- Revisions allows you to restore files to a previously saved version. For more information, see [“Revisions” on page 19](#).
- Comments allows you to add a comment to a file.

- Rename a file. Type the new name in the dialog box and click the **Rename** button.
- Properties allows you to view attributes of the file.

## Folder Actions

The following actions are available for folders:

- Open a folder by clicking the folder name.

More folder actions are available by clicking the  icon.

- Delete a folder.
- ShareWith allows you to share a folder with another user. For more information, see [“Share File or Folder” on page 21](#).
- Send To allows you to send a folder in a new Secure Mail message. For more information, see [“Compose” on page 26](#).
- Comments allows you to add a comment to the folder.
- Rename a folder. Type the new folder name in the dialog box and click the **Rename** button.
- Properties allows you to view the attributes of the folder.
- Copy the file or folder to Secure Folders.

## Trash Bin

When you delete an item from Shared Drive, it is moved to the Trash Bin where it is temporarily stored until the Trash Bin is emptied. This gives you an opportunity to recover deleted files and restore them to their original location.

When a shared item is deleted from Shared Drive, it is moved to the Trash Bin for all users who had access to the shared item. Likewise, when a shared item is restored from the Trash Bin to the item's original directory, it is restored for all users who had access to the shared item.

The Trash Bin contains the following options:

### Breadcrumbs

[Trash Bin](#) > [Install Guides](#)

Click on the bread crumbs to navigate through the deleted folders.


### Empty Trash Bin

Click the **Empty Trash Bin** button to permanently delete items from Shared Drive. Items deleted from the Trash Bin cannot be recovered.

## Delete Selected Items


Permanently delete the selected item from Shared Drive.

## File Actions

The following actions are available for files by clicking the  icon:

- Delete the selected file. It can no longer be recovered.
- Restore the selected file to the file's original location in Shared Drive.
- Revisions allows you to view the revisions for the file. For more information, see [“Revisions” on page 19](#).
- Comments allows you to view the comments for the file.
- Properties allows you to view the attributes of the file.

## Folder Actions

The following actions are available for folders by clicking the  icon:

- Delete a folder. You can optionally delete one or more folders by selecting the folder checkboxes and clicking the **Delete** button.
- Restore the selected folder to the folder's original location in Shared Drive.
- Comments allows you to view the comments for the folder.
- Properties allows you to view the attributes of the folder.

## Upload to Shared Drive

The Upload to Shared Drive window allows you to upload files and folders from your local file system to Shared Drive. You can drag-and-drop files and folders directly on to this window.

**Note:** A folder's directory structure will be flattened on upload.

You can perform the following actions in the Upload to Shared Drive window:

### Select Files

The Select Files button launches your system's file chooser. Select the files you wish to upload.

### Close

Closes the Upload to Shared Drive window without interrupting current file transfers.

### Clear

Clears the list of uploaded files.



## CHAPTER 5

# Secure Mail

The Secure Mail feature in Managed File Transfer allows you to send and receive ad-hoc messages with file attachments. When a message is sent, each recipient will receive a unique link to a location where the recipient can download the file(s) securely. When a message is sent using Certified Delivery, the message appears in the recipients Inbox. Recipients have the option to reply to and attach files to messages.

There are no limits to the number of files you can attach to a Package, however the size of an individual file in a Package can be limited by a Managed File Transfer Product Administrator. The message and files inside each Package are automatically encrypted with AES-256 as you upload them to the server.

The Secure Mail menu option is available if your account is authorized to use this feature. The Secure Mail dashboard provides access to all the Secure Mail features. From the Secure Menu pane you can compose a new message, view your inbox, view drafts, view messages in the outbox, view a list of all sent messages and manage your address book.


**Note:** The Compose, Drafts, Outbox, and Sent Items features are only available to users that are fully authorized to use Secure Mail. The Inbox and Address book features of Secure Mail are available to users with access to Shared Drive or Secure Folders.

The Secure Mail window has the following sections:


### Inbox

The Inbox section displays incoming Certified Delivery messages and message replies from your recipients. If the feature is enabled by the Managed File Transfer Product Administrator, you can allow your message recipients to reply to your message and include file attachments.


### Compose

The Compose page allows you to attach files and specify a message that will be sent to one or more recipients. The options available on the Compose page are set by the Managed File Transfer Product Administrator. To compose a new message, either click the  **Compose** link in the Secure Mail pane. For more information, see [“Compose” on page 26](#).



### Drafts

A Package can be saved as a draft, allowing you to come back at a later time to attach more files or alter the message on the Package before sending. The most recent drafts are displayed in the Secure Mail dashboard. The complete list of drafts are found by clicking the  **Drafts** link in the Secure Mail pane. For more information, see [“Drafts” on page 28](#).


### Outbox

When you send a Package, it will be placed in the Outbox while Managed File Transfer sends an email to each of the recipients that includes a unique URL to access the Package. The complete list of Packages in the Outbox are found by clicking the  **Outbox** [“Outbox” on page 29](#) in the Secure Mail pane.

## Sent Items

The Sent Items section shows Packages that have been sent. If the  icon appears next to any Package, there may have been an error sending the email(s) or the package may no longer be available. Hovering over the icon will allow you to view the status of these Packages. The complete list of sent Packages are found by clicking the  **Sent Items** [“Sent Items” on page 29](#) in Secure Mail pane.

## Address Book

The Address Book contains a directory of your recipient's email addresses. When you send a Secure Mail message, the address book will store the email address on the Recently Used tab. Contacts and their details can be permanently saved by adding them in the Contacts tab. You can create email distribution lists by using the Groups tab. The Address Book can be accessed by clicking the  Address Book link in the Secure Mail pane. For more information, see [“Address Book” on page 30](#).

# Compose


The Compose page is where Secure Mail Packages are constructed and sent. The top section is where you can specify one or more recipients, a subject to appear in the email and an optional message. When an email is sent to the recipient, it will contain a unique URL to access these files and the message for this Package.

You can password protect the Package, set an expiration date, enforce a maximum download limit, allow message replies, and more. Based on the configuration, not all options may be available and some options will have defaults or ranges enforced.

The Attachments section is where files can either be attached from your local computer, the Secure Folders, or the Shared Drive.

The following options on the Compose page specify the recipient and Package settings.

### To

The email address of the recipient. The email address can be the standard email address or it may also include the name of the recipient, for example: Andrew Thomas <athomas@example.com>. Separate multiple email addresses with commas. Click the  button to select email recipients or groups from the address book. For more information, see [“Address Book” on page 30](#).

### Subject

The subject of the email to send to the recipient(s). The maximum length of the subject line is 255 characters.

### Message

The message that will be shown to the recipient(s) after they open the Secure Mail Package. The message is optional.

## Secure Mail Options

The Compose page Options pane contains the following fields:

### Require Registered Users

When Certified Delivery is enabled by the Product Administrator, you can specify if your recipients must be registered users. If the recipient is not a registered user, the link in the email will take them to the Self

Registration page. For more information, see [“Self-Registration” on page 12](#). The Package will appear in the user's Secure Mail Inbox.

**Expire Package**


The number of days before the Package expires and the files can no longer be downloaded.

**Read Receipt**

An email will be sent to you when your recipient reads the Package.

## Attachments

Click the appropriate link to open a file browser that will allow you to attach files or folders to the Package. You can also drag and drop files from your desktop directly over the Secure Message to upload the files. There are no limits to the number of files you can attach to a Package, however the size of an individual file in a Package can be limited by a Managed File Transfer Product Administrator.

If needed, click the  icon to delete an attached file.

## More Options

If registered users are not required, the Options window appears when you click the Send button.

**Password Protect Package**

All files in a Package are protected by a unique URL, however your Managed File Transfer administrator can allow you to further protect your Package using a password. Passwords that are generated automatically are a lower-case 10-byte alpha-numeric code. If you do not send the password to the recipient in the email, you will need to communicate the password to them.

**Limit Downloads**

The number of times each file can be downloaded per recipient.


**Allow Reply**

When enabled, recipients of this Package can reply back with a message and one or more attachments. Recipients do not need to be registered users to send a reply message. Message replies will appear in your Inbox. For more information, see [“Inbox” on page 27](#).

## Inbox

Message replies and Certified Delivery packages are available on the Inbox page. Unread messages appear in bold font.

## Inbox Actions



The following actions are available by selecting the  Actions icon:

- View the message. For more information, see [“View Message” on page 28](#).
- Forward the message to another recipient.
- Reply to the message.

- Delete the message.

## Table Navigation Tools

The following table navigation tools are available:

- Click the  **Previous** button to move back to the previous page of results.
- Click the  **Next** button to move forward to the next page of results.
- Select the number of Rows to display on each page.

## View Message

The View Message page displays message details along with any attachments on the Package. The message can be viewed by clicking the view icon on the [“Inbox” on page 27](#) page or from the Secure Mail page by clicking the **View Details** link from the More Actions drop-down. For more information, see [Chapter 5, “Secure Mail” on page 25](#).

## Page Toolbar

The following actions are available from the page toolbar:

- Delete the messages from your inbox.
- Reply to the Secure Mail message. The message recipients will be populated with the sender's email address and the Message field will include the original message text.
- Forward the message to another recipient. The message will include the original message text and attachments.
- Download all file attachments in a single .ZIP file.
- Click the **Done** button to return to the Inbox.


## Attachments

Message attachments can be downloaded by clicking the file name link.

## Drafts

Any messages that were saved can be edited before sending.

## Drafts Actions

The following actions are available by selecting the  Actions icon:

- Edit the saved message.
- Delete the message.



## Footer Actions

The following actions are available when one or more items are selected from the table:

- Delete one or more messages.

## Table Navigation Tools


The following table navigation tools are available:

- Click the  **Previous** button to move back to the previous page of results.
- Click the  **Next** button to move forward to the next page of results.
- Select the number of Rows to display on each page.

# Outbox

When you send a Package, it is placed in the Outbox while Managed File Transfer sends an email to each recipient.



## Outbox Actions

The following actions are available by selecting the  Actions icon:


- View the Package Details. For more information, see ["View Package Details" on page 32.](#)
- Resend the Package.
- Delete the Package without sending it.

## Table Navigation Tools


The following table navigation tools are available:

- Click the  **Previous** button to move back to the previous page of results.
- Click the  **Next** button to move forward to the next page of results.
- Select the number of Rows to display on each page.

# Sent Items

Sent Packages are visible on the Sent Items page. Packages displayed in gray are not active. If the  icon appears next to a Package there may have been an error sending the email(s) or the Package may no longer be available. Hovering over the icon will allow you to view the status of these Packages.

## Sent Items Actions

The following actions are available by selecting the  Actions icon:

- View the Package Details. For more information, see [“View Package Details” on page 32](#).
- Forward the Package to another recipient.
- Revoke the Package. Revoking a Package makes it unavailable to recipients.
- Delete the Package and its contents.



## Footer Actions

The following actions are available when one or more items are selected from the table:


- Delete the package(s).
- Revoke the package(s).

## Table Navigation Tools

The following table navigation tools are available:



- Click the  **Previous** button to move back to the previous page of results.
- Click the  **Next** button to move forward to the next page of results.
- Select the number of Rows to display on each page.

## Address Book

Email contacts and groups are managed using the Address Book. While composing a message, the address book can be accessed by clicking the  button. For more information, see [“Compose” on page 26](#).

## Page Toolbar

Perform the following actions with the Page Toolbar.

- Click the  **Create Contact** button to add a new contact to the Address Book.
- Click the  **Create Group** button to add a new distribution list to the Address Book.

## Recently Used


All recipients of email messages are automatically saved to the Recently Used tab.

### Actions

The following actions are available on the Recently Used tab:

- You can delete multiple addresses by selecting them from the list and then clicking the **Delete** button.

## Recently Used Actions

The following actions are available by selecting the  Actions icon:

- Add the contact to your saved contacts.
- Delete a recently used contact.

## Contacts


The Contacts tab displays your saved contacts.

### Actions

The following actions are available on the Contacts tab:

- You can delete multiple contacts by selecting them from the list and then clicking the **Delete** button.

### Contacts Actions:

The following actions are available by selecting the  Actions icon:

- Edit a contact.
- Delete a contact.

## Groups Tab


The Groups tab allows you to create email distribution lists.

### Actions

The following actions are available on the Groups tab:

- You can delete multiple groups by selecting them from the list and then clicking the **Delete** button.

### Groups Actions

The following actions are available by selecting the  Actions icon:

- Edit a group.
- Delete a group.

## Secure Mail Download

When a Secure Mail Message is sent to an unregistered recipient, a link is provided to view the package directly from the Secure Mail Download page on the HTTPS server. The Secure Mail Download page displays the message details along with any attachments on the Package.

## Page Toolbar

The following actions are available from the page toolbar:

### Reply to Sender

Allows the recipient to send a message reply when permitted by the sender. The message recipients will be populated with the sender's email address and the Message field will include the original message text.

### Download


Download all file attachments in a single .ZIP file.


## Attachments

Message attachments can be downloaded by clicking the file name link.

## View Package Details

The Package Details page displays the logged data for the selected Package. The details for a Secure Mail

Package can be viewed by clicking the  icon on the Sent Items page or from the Secure Mail page by

clicking the  **View Details** link from the More Actions drop-down. For more information, see [“Sent Items” on page 29](#) and [Chapter 5, “Secure Mail” on page 25](#).

## General Tab

The General tab displays information related to when a Package was sent, the files that were attached, the overall Package status and specified security options.

## Activity

The Activity tab displays the associated log entries for the selected Package.

### Recipients or File

The Recipients and Files sections in the left panel display either the recipients of the Package or the list of files enclosed in the Package. Clicking a recipient or a file name filters the Log results to display the activity for the selected recipient or file. When a recipient or file is selected, the line below the Activity tab displays what criteria is filtering the results and provides a link to Clear Selection.

### Logs

The Logs portion of the page displays log details related to the Package activity.



## File Downloaded Information

If the Package included file attachments, the File Downloaded Information displays the remaining downloads and how many times each file has been downloaded.

## CHAPTER 6

# Secure Folders

Secure Folders provides browser access to authorized files and folders on the server. With Secure Folders, files can be transferred quickly between the desktop and server over HTTPS protocol. Since files in Secure Folders are stored on a standard file system, they can be directly accessed by backend applications and programs.

The Secure Folders has a standard HTML5 interface.

## Standard Interface







The standard interface provides options to quickly access and exchange files between your computer and the Secure Folders on the server using a HTML interface. Some options may not be available based on your permissions.

The interface provides a page toolbar that lets you navigate to and between folders, create a folder, share folders, and upload folders.


Secure File options allow you to share, rename, or delete a file or folder, and send a file or folder with Secure Mail.

## Page Toolbar

The following actions are available from the page toolbar:

- Navigate directly to a folder by specifying its path next to the Location field and then clicking the  icon in the toolbar.
- Move up a folder by clicking the  icon in the toolbar. If the icon is unavailable, you are in your home folder.
- Return to your home directory by clicking the  icon in the toolbar.
- Create a new folder (under the current folder) by clicking the  icon in the toolbar. Type the name for the new folder in the dialog box and click the **Create** button.
- Refresh the current folder by clicking the  icon in the toolbar.
- Share the current folder with another user by clicking the  icon. The Share Folder page appears. For more information, see [“Share Folder” on page 37](#).
- Upload files by clicking the Upload button and following the upload instructions. For more information, see [“Upload Files” on page 35](#).

## Secure Folders Actions

The following actions are available by selecting the  Actions icon next to a file:

- Rename a file. Type the new name in the dialog box and click the **Rename** button.
- Delete a file. You can optionally delete one or more files by selecting the file checkboxes and clicking the **Delete** button.
- Share a file with another user. The Share File page appears. For more information, see [“Share File” on page 36](#).
- Send a file in a new Secure Mail message. For more information, see [“Compose” on page 26](#).

The following actions are available by selecting the  Actions icon next to a folder:

- Rename a folder. Type the new folder name in the dialog box and click the **Rename** button.
- Download the folder as a .ZIP file.
- Delete a folder.
- Share a folder with another user. The Share Folder page appears. For more information, see [“Share Folder” on page 37](#).
- Send a folder in a new Secure Mail message. For more information, see [“Compose” on page 26](#).

## Footer Actions

The following actions are available when one or more items are selected from the table:

- Delete the selected item(s).
- Send the selected item(s) to a recipient using Secure Mail. For more information, see [“Compose” on page 26](#).
- Download the selected item(s) as a .ZIP file.
- Copy the item(s) to Shared Drive.

**Note:** Deleting a folder also deletes all files and sub-folders within the folder.

## Upload Files

If authorized, you can upload files from your local computer to the server using the Upload to Folder page. Files and folders can be dragged and dropped from your desktop directly on to this page.

**Note:** When dragging a folder on to the Upload to Folder page, the folder's directory structure will be flattened.

Follow the instructions below to upload files:

1. In the Upload to Folder page, click the **Select Files** button and select the file to upload.
2. Indicate the action to take if a file with the same name already exists in the folder to which you are uploading.
  - Rename - automatically renames the uploaded file by appending a sequential number to the file name so both files are maintained.
  - Overwrite - replaces the existing file with the one being uploaded.

- Skip - does not upload the duplicate file. If more files remain, the upload process proceeds to the next file in the list.
  - Error - will stop the upload without processing the remaining files.
3. Click the **Clear** button to clear the list of uploaded files.
  4. Click the **Close** button to close the Upload to Folder page.


## Share File

If file sharing is enabled by the administrator, the Share File page allows you to share a file on the server with other users. Specify the recipient(s) email address, subject and message, and then click the Share button. The recipient(s) will receive an email notification with a link to access the file. If a recipient is not registered, they will be prompted to create an account before they can access the file.

Specify the following settings:

### To

The email address of the recipient(s). The email address can be the standard email address or it may also include the name of the recipient, for example: Andrew Thomas <athomas@example.com>.

Separate multiple email addresses with commas. Click the  button to select email recipients or groups from the address book. For more information, see ["Address Book" on page 30](#).

### Subject

The subject of the email to send to the recipient(s). The maximum length of the subject line is 255 characters.

### Message

The message that will be shown to the recipient(s) when they receive the notification. The message is optional.

### File

The path of the shared file relative to your home directory.

### Share As

The file name that appears to the recipient(s).

### Permissions

As the owner of the shared file, you can set permissions to limit what actions your recipient(s) can do with the file.

**Note:** You have two options to remove permissions from a file once it is shared: Delete the file from your File Manager, or contact your administrator and ask them to remove the file from your recipient(s) file system.


# Share Folder

If folder sharing is enabled by the administrator, the Share Folder page allows you to share a folder on the server with other users. Specify the recipient(s) email address, subject and message, and then click the Share button. The recipient(s) will receive an email notification with a link to access the folder. If a recipient is not registered, they will be prompted to create an account before they can access the folder.

You can specify the following settings:

## To

The email address of the recipient(s). The email address can be the standard email address or it may also include the name of the recipient, for example: Andrew Thomas <athomas@example.com>.

Separate multiple email addresses with commas. Click the  button to select email recipient(s) or groups from the address book. For more information, see ["Address Book" on page 30](#).

## Subject

The subject of the email to send to the recipient(s). The maximum length of the subject line is 255 characters.

## Message

The message that will be shown to the recipient(s) when they receive the notification. The message is optional.

## Folder

The path of the shared folder relative to your home directory.

## Share As

The folder name that appears to the recipient(s).

## Permissions

As the owner of the shared folder, you can set permissions to limit what actions your recipient(s) can do with the folder and subfolders. Folder permissions are inherited. If you give your recipient(s) complete permissions to a folder and subfolder, along with the Share permission, your recipient(s) will be able to share folders and set folder permissions for others.

**Note:** You have two options to remove permissions from a folder once it is shared: Delete the folder from your File Manager, or contact your administrator and ask them to remove the folder from your recipient(s) file system.

## CHAPTER 7

# My Account

The options on the My Account menu allow you to make changes to your account profile or change your password.

## Change Password

If enabled, the Change Password page allows you to update your password for your account. To change your password, point to My Account in the menu-bar and then click **Change Password**. Type your current password and a new password, and then click the **Change Password** button.

## Update Profile

If enabled, the Update Profile page allows you to change your name, organization, and phone number. After logging in, open the Update Profile page by pointing to My Account in the menu-bar and then clicking Update Profile. Change the information as needed and then click the **Update** button.

## CHAPTER 8

# Activity Report

If you have permission, you can view a log of your audit activity on the Managed File Transfer file server. To view your audit activity, click the **Activity Report** link in the menu bar.

## Date Range

The Date Range allows you to limit the scope of your search based on date and time. Click the calendar icon to select the date and time.

## Protocol

Select the protocol from the drop-down list to view audit activity for. Allowable options are Shared Drive, FTP, FTPS, SFTP, HTTPS, and AS2.



## Status

There are three status types you can use to filter the report:

- Successful - Selects audit records that were successful
- Warning - Selects audit records that had a warning
- Error - Selects audit records that encountered an error

## Table Navigation Tools

The following table navigation tools are available:

- Click the  **Previous** button to move back to the previous page of results.
- Click the  **Next** button to move forward to the next page of results.

- Select the number of Rows to display on each page.



## CHAPTER 9

# Invite Users

If you have permission, you can invite other individuals to also use the Managed File Transfer secure file server. To invite a new user, click the **Invite User** link in the menu bar.

On the Invite Users page, type the email addresses of the individuals you would like to invite. Separate multiple email addresses with commas. When complete, click the **Send Invitation** button.

## Complete Registration

Each recipient will receive an invitation email. After they click the link to register, they will finish the registration process online.

**Note:** New user accounts may need to be approved by an administrator before they use Managed File Transfer.

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