Secure File Exchange
Quick Reference Guide

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GETTING STARTED CHECKLIST (THE BASICS)

The checklist below is provided to help you get started with SFX (Secure File Exchange).

☑	TASK
☐	Review User Roles
☐	Review how to navigate in SFX
☐	Review the video, "Where are the Menu Options"
☐	Create Folders
☐	Add Files
☐	Update an Existing File
☐	Set Alert - receive notification regarding changes on file/folder

(This is not a comprehensive list of everything you can do... just a list to help get you started with Secured File Exchange)

Role Definitions

Access to folders and documents is controlled with user roles. Users can have one or more of the roles listed below. Users can have different roles pertaining to different folders or documents. In other words, a user with the Viewer role on folder A, could have the Collaborator role on folder B.

SFX Role Summary

Role Title	Role Capabilities
V VIEWER	Viewers can view and download files and folders.
CT CONTRIBUTOR	Contributors can view, download, and create files and folders, in addition to performing Owner tasks on their files and folders.
CL COLLABORATOR	Collaborators can view, download, create, and update files and folders.
CO COORDINATOR	Coordinators can view, download, create, update, and delete files and folders. They can also edit file and folder properties and manage access to files and folders.
A ADMIN	Administrators can perform a wide range of tasks, such as: • View, download, create, update, and delete all files and folders • Change file and folder ownership • Assign folder fax numbers • Configure global approval and rejection settings • Configure repository settings
(Owner)	Owner is not an assignable role like the roles listed above. If you see the owner icon displayed to the right of a file or folder item, it indicates you have the Owner role for the item and you can control user access, delete the file or folder, etc. Other users may be able to perform file or folder operations, depending on their roles.

HOW DO I NAVIGATE IN SFX

Note: Your navigation options can be limited by your assigned roles. If you do not see an option or a screen element described in this user guide, then you do not have the required role.

The following screen shot illustrates common SFX window elements.
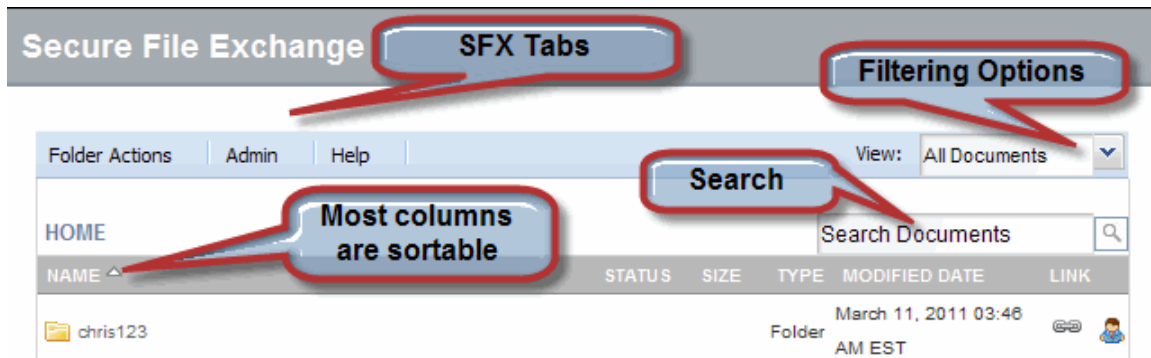
Navigate to a file by searching for it, or by drilling down into the folder structure.

To drill down into the folder structure:

1. Click a folder from the Home Page. The folder contents display.
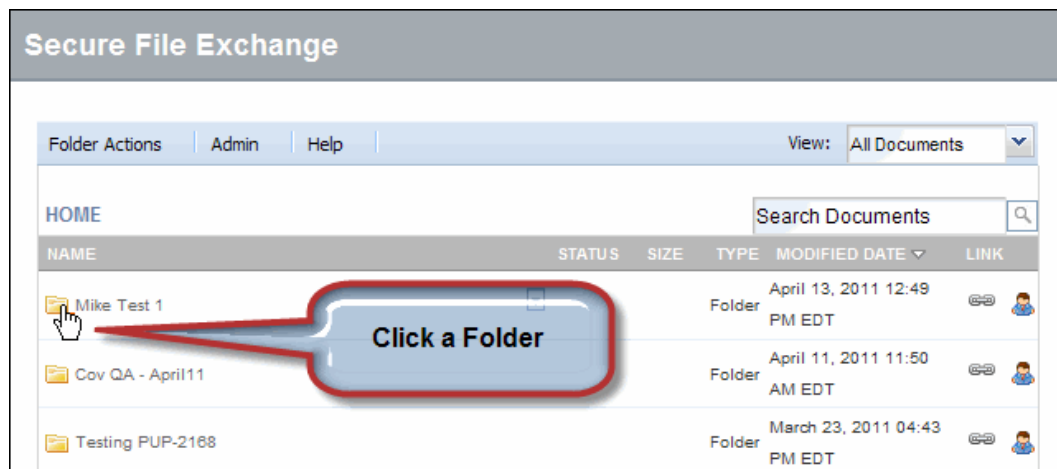
2. Select subfolders as required.

3. Click the file you want to view.

4. You can quickly navigate to the Home page or a folder within the current path by clicking the items in the navigation path, as shown below.

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WHERE ARE THE MENU OPTIONS?

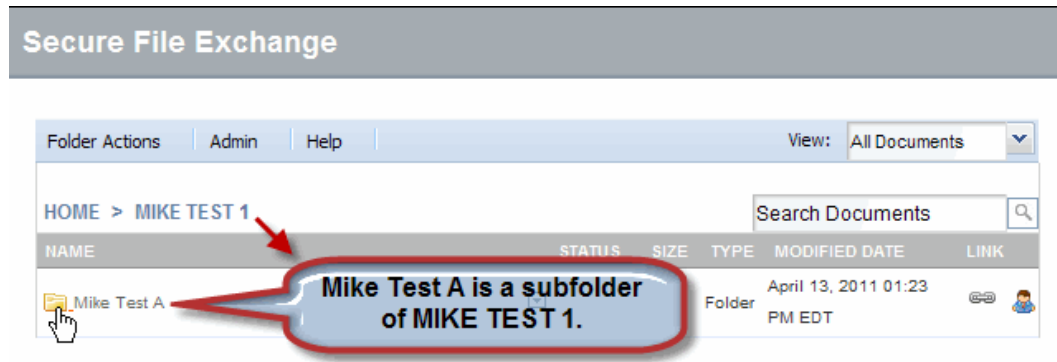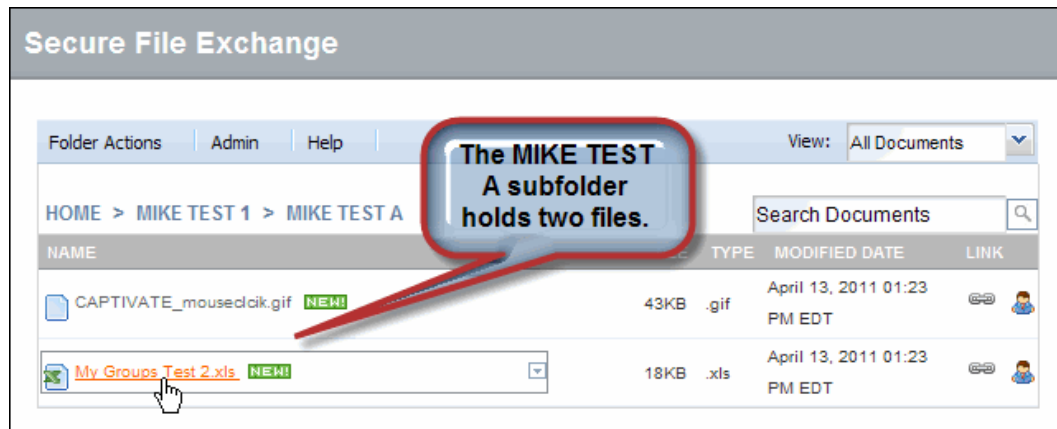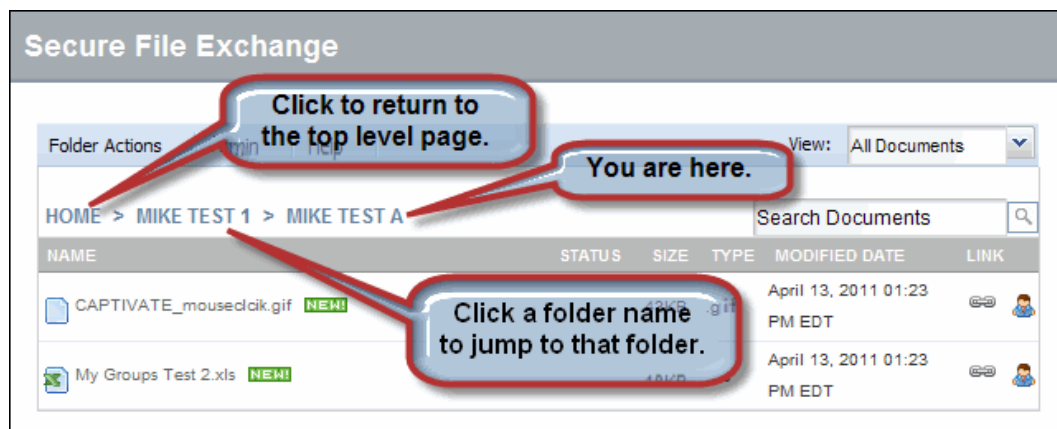Most menu options are displayed by clicking the drop-down arrow located at the far right of the item.

The following sequence of screen shots illustrates item-related menu options.

- An item's menu options are not always visible.
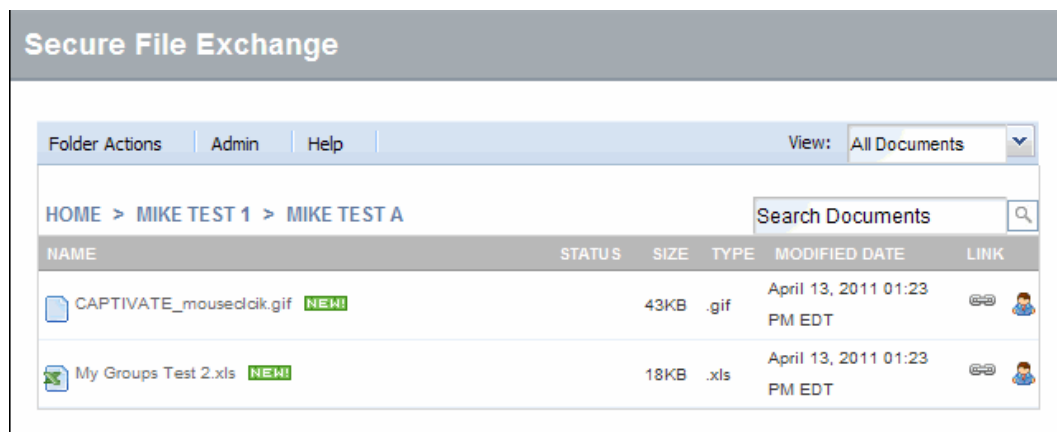
- When you hover the cursor over an item, its menu selection drop-down arrow displays.
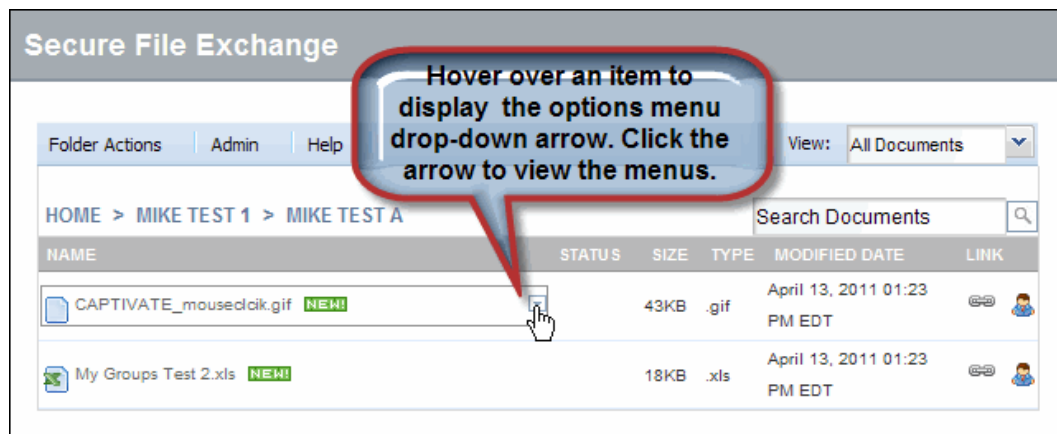
- Clicking the arrow displays the initial list of menu options.

View the complete user guide and additional support material:
- SFX for Healthcare: https://portal.covisint.com/web/supporthc/sfx
- SFX for Manufacturing: https://portal.covisint.com/web/supportauto/sfx
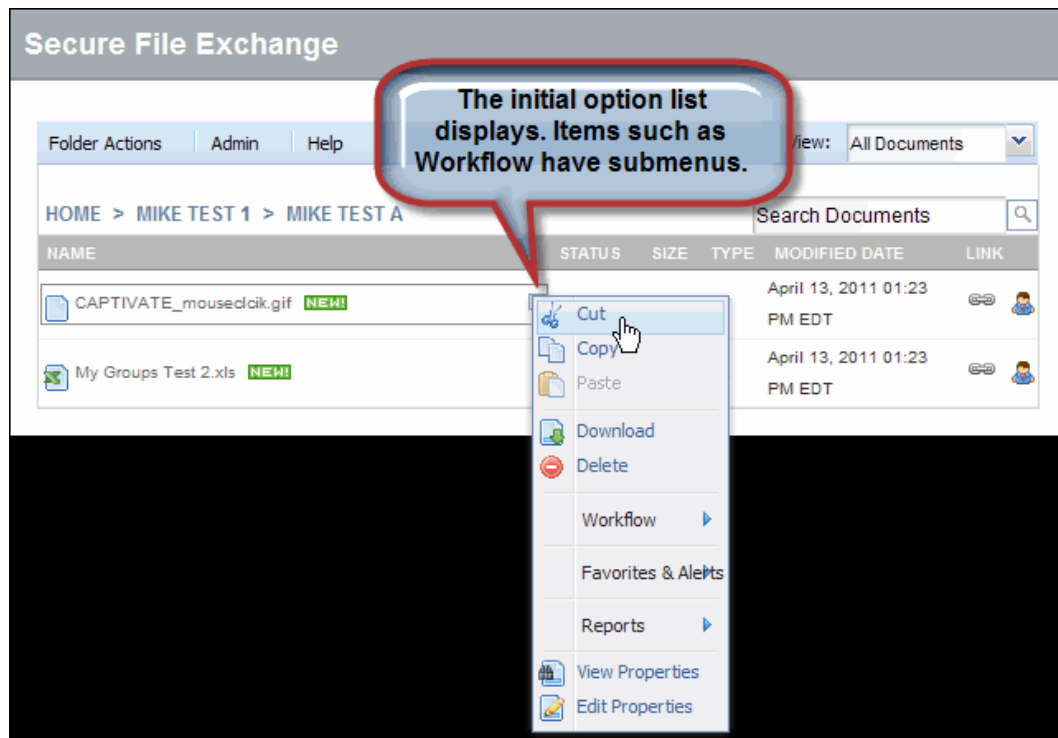
- Some menu options have submenus.
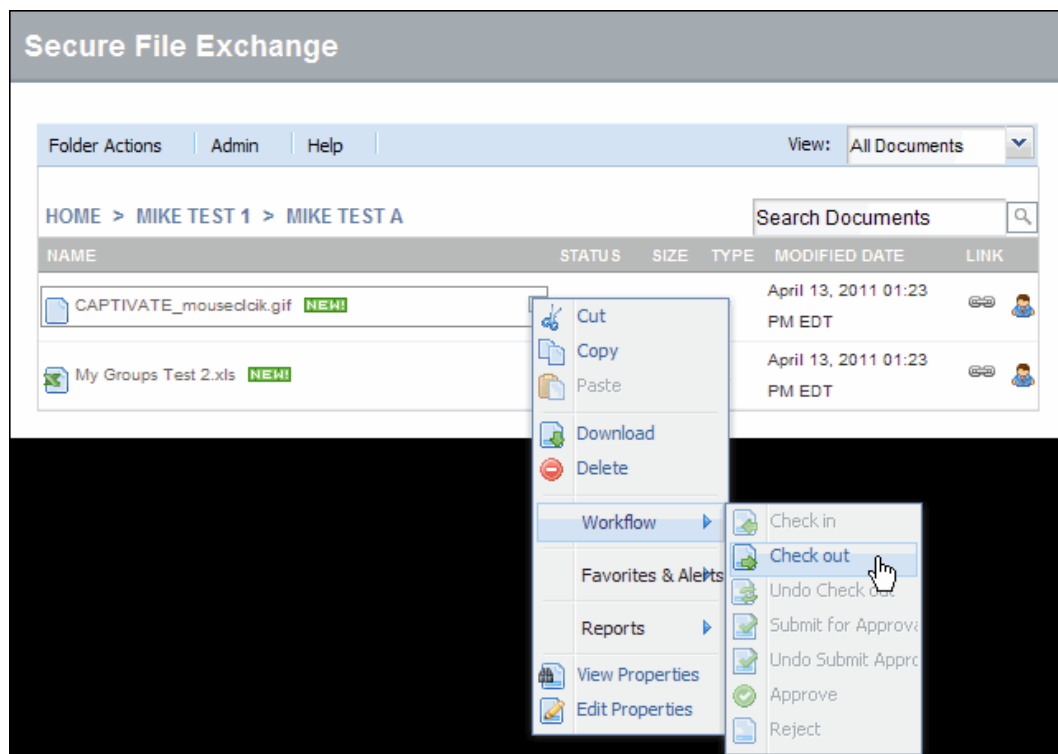
Creating a New Folder

1. Navigate to the folder in which you wish to create a new folder (Or click HOME in the navigation path to create a top-level folder).
2. From the **Folder Actions** menu, click **New Folder**. The Create Folder fields display.

3. In the **Create Folder** fields:

    a. Type the *name* of the folder.
    b. Type a *description* of the folder.
4. Click **OK**.

RESULT:

You have successfully created a folder. Next, you may want to:
- add a file to the folder
- require approval on the folder (when available)
- modify access rights to the folder

Adding or Uploading a New File

> **i** Note: The following special characters are **not allowed** in file names:
>
> **/ & : % + ? ; ***
>
> We recommend you do not include spaces in the names of files stored on SFX.

1. Navigate to the folder to which you want to upload the file. (Or create a new folder.)
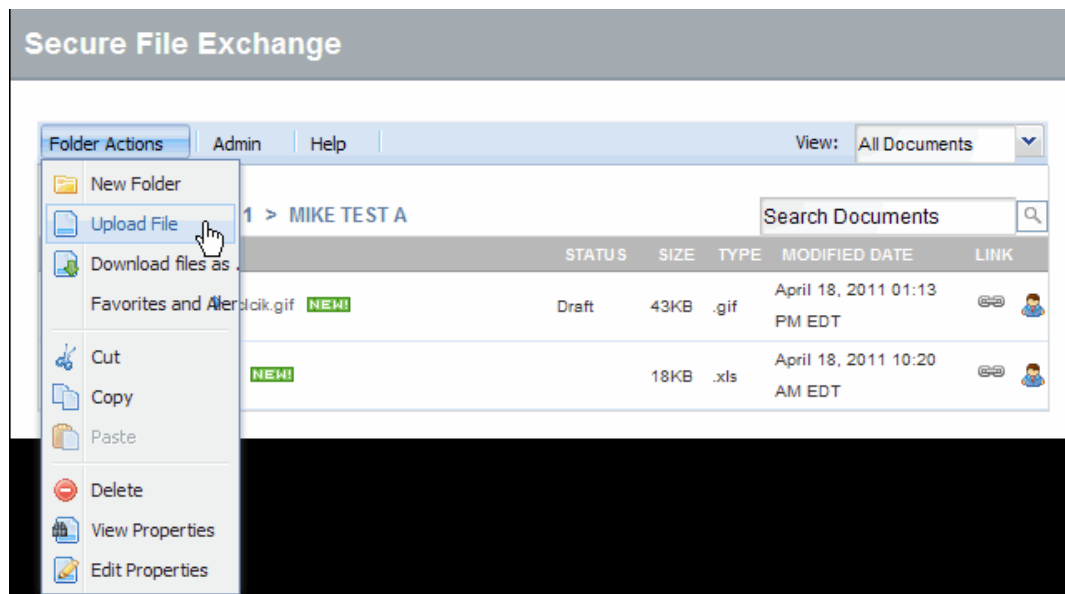
2. From the *Folder Actions* menu, click **Upload File**. The upload screen displays.

> **i** Note: Your roles may not allow you to modify optional fields. For details, refer to Additional Options when Uploading a File.

View the complete user guide and additional support material:
- SFX for Healthcare: https://portal.covisint.com/web/supporthc/sfx
- SFX for Manufacturing: https://portal.covisint.com/web/supportauto/sfx

3. Click **Browse**.
4. Browse to and select the file you want to upload.
5. Optional:Upload additional files by clicking the ⊕ **Add another file** link, and repeating steps 3-4.
6. Click **OK**.
   - If approval is **not** required, your uploaded file will be accessible immediately.
   - If approval is required, your file is uploaded as a draft. Your file is not available to SFX users until it is approved. Proceed to the section entitled Submitting a Draft for Approval.

RESULT:

You have successfully uploaded a file. Next, you may wish to allow others access to your files.

If you wish to set approval or effective dates, descriptions or keywords, refer to Additional Options when Uploading a File.

Deleting a File

> ℹ️ You must be the file owner or have an appropriate SFX role to delete a file. Deleted files are moved to the Recycle Bin. Only an SFX Administrator can restore files that have been moved to the recycle bin.

1. Navigate to the file you want to delete from SFX. You cannot delete a file that is checked out.
2. Click the **drop-down arrow** displayed to the far right of the file name.

Where is the drop-down arrow?
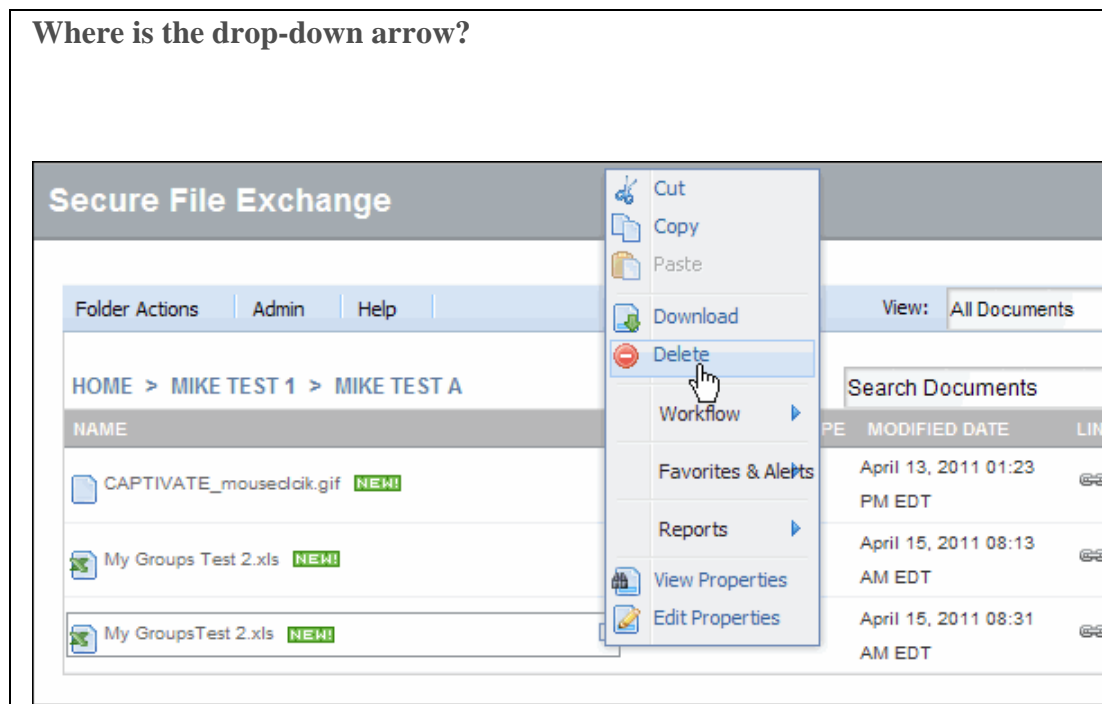
3. Click **Delete**.
4. Click **Yes** to confirm deletion.

RESULT:

You have successfully deleted a file.

Downloading a Document

1. Locate the file you want to download by searching or browsing the folder hierarchy.
2. Click the **drop-down arrow** at the right of the file name.
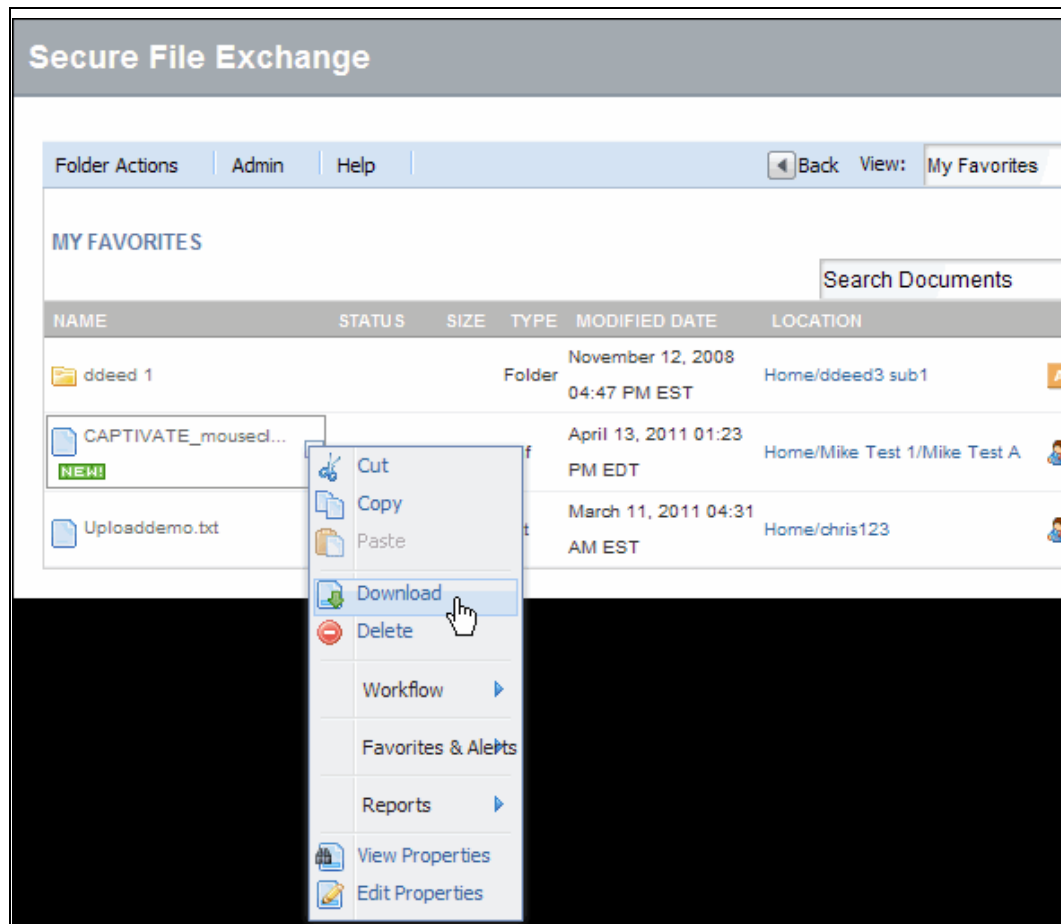
3. Click **Download**.
4. In your PC's File Download dialog, click **Save**.
5. Navigate to the location to which the file should be downloaded.
6. Click **Save**.

RESULT:

You have successfully downloaded a document.

Updating a File

This procedure assumes you have downloaded and modified a file, and you want to update it on SFX.

ⓘ You create or edit files outside of SFX, using an appropriate software program.

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1. Navigate to the **folder** that contains the file you want to update.
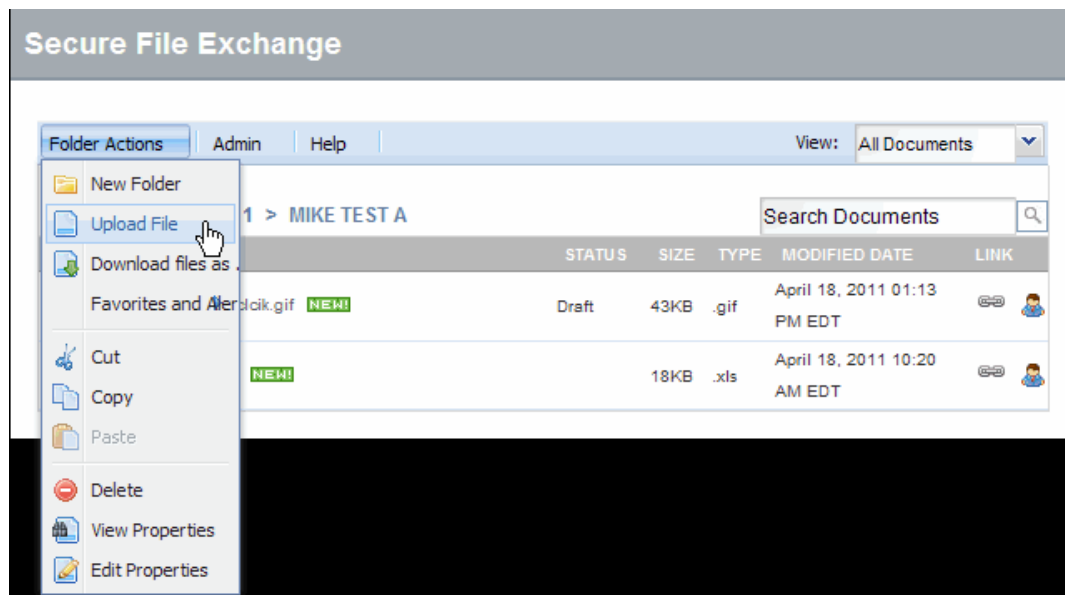
2. From the *Folder Actions* menu, click **Upload File**.
3. Click **Browse**.   **View file name restrictions >>>**

ⓘ Note: The following special characters are **not allowed** in file names:

   / & : % + ?   ; *

We recommend you do not include spaces in the names of files

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stored on SFX.

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4. Browse to and select the file you want to upload.
5. Optional:Set approval or effective dates, descriptions or keywords, as required. For details, refer to Additional Options when Uploading a File.
6. Click **OK**. A confirmation dialog similar to the following is displayed.
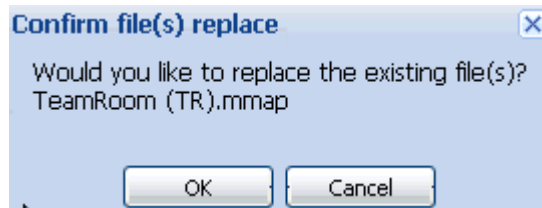
7. Click **OK**. The file is uploaded and a new version is created.
   a. If approval is **not** required, your uploaded file is set to Checked Out status. Perform Checking in a File (no approval) when you are ready to make the file available to other users.
   b. If approval is required, your uploaded file is set to Draft status. Perform Submitting a Draft for Approval when you are ready to make the file available to other users.

RESULT:

You have successfully updated a file.

Modifying Access Rights to a File or Folder

> ℹ️ Files and folders inherit access rights from the folder in which they reside. Users with appropriate privileges can modify access rights.
>
> Performing these steps to a folder applies to the folder, and to its subfolders - unless you further modify the subfolders.
>
> Performing these steps for a file applies only to the item with which you are working and does not impact access rights to other files.

1. Navigate to the file or folder whose access rights you want to modify.   (How do I navigate to a file or folder?)
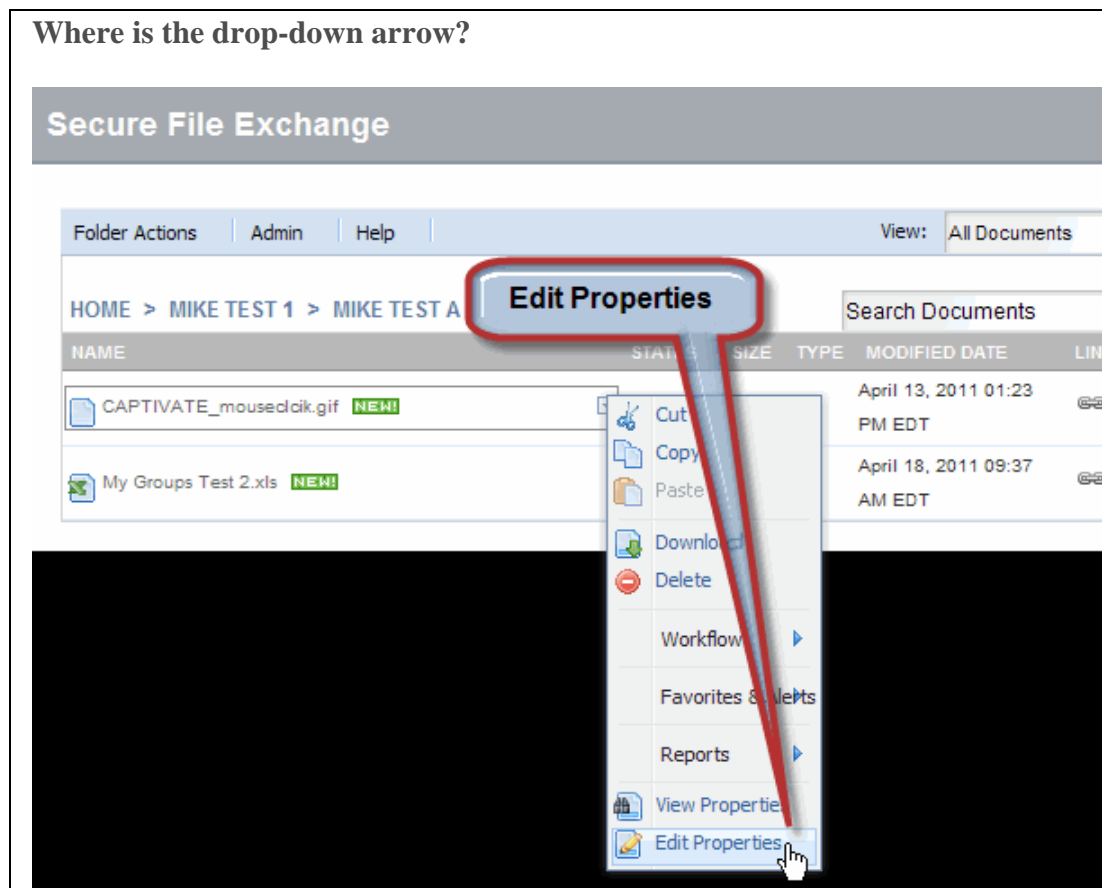2. Click the **drop-down arrow** at the far right of the file/folder name.

Where is the drop-down arrow?

Secure File Exchange

Folder Actions | Admin | Help   View: All Documents

HOME > MIKE TEST 1 > MIKE TEST A   **Edit Properties**   Search Documents

NAME   STATUS   SIZE   TYPE   MODIFIED DATE   LINK

CAPTIVATE_mouseclick.gif NEW!   April 13, 2011 01:23 PM EDT

My Groups Test 2.xls NEW!   April 18, 2011 09:37 AM EDT

Cut
Copy
Paste
Download
Delete
Workflow ▶
Favorites & Alerts
Reports ▶
View Properties
Edit Properties

3. Click **Edit Properties**. The **Edit Properties window displays**.

4. Clear the check box next to *Uncheck this box to remove inherited access controls...* A confirmation dialog displays.

5. Click **Yes** to remove inherited access controls for the item. The Edit Properties refreshes and **displays the set of properties** you can modify for the item.

Secure File Exchange

Folder Actions | Help | View: | All Documents

HOME > MIKE TEST 1 > TEST2-INHERITANCE

EDIT PROPERTIES

Name:

Test2-inheritance

Description:

Tahoma | B *I* U | A A | A | ab | ≡ ≡ ≡ | 🌐 | ≣ ≣ | 📝

Upload Custom Icon:

Select an icon:

[   ] Browse...

Submit

☐ **Require approval**   Changes to files(s) are subject to approval ❓

☐ **Check this box to inherit access controls from the folder above** ❓

A FOLDER ADMIN:

CO COORDINATOR:

⊕Add Members

🗑 Tester Two

CL COLLABORATOR:

⊕Add Members

🗑 Deed, Debby , 🗑 Deed, Diane

CT CONTRIBUTOR:

⊕Add Members

🗑 View, Victor ,   🗑 02, ssatraining ,   🗑 Seashell, Sally

V VIEWER:

⊕Add Members

OWNER: ssatraining 02

OK   CANCEL

6. If you want to provide access to members, click next to **Add Members** in the role type to which you want to add users. The User Directory window displays.
    a. Type the name (or partial name) of the user or group you want to add in the **Type in name** field.
    b. If you want to restrict your search to individual users, click the **Include** drop-down arrow and select **Users** from the list.
    c. Click **Find**. The screen refreshes, and the search results display.
    d. Select the check box of the users and groups you want to add. The users display in the Selected People box.
    e. Repeat steps a through d as required until you are finished adding users.
    f. Click **OK**. The User Directory window closes and the added members display in the Edit Properties window.
7. If you want to remove access to the file or folder, click , the wastebasket icon, next to the users and groups whose access you want to remove.
8. Click **OK**.

RESULT:
You have successfully modified access rights on an item.

View the complete user guide and additional support material:
- SFX for Healthcare: https://portal.covisint.com/web/supporthc/sfx
- SFX for Manufacturing: https://portal.covisint.com/web/supportauto/sfx

Sending a Link to a File or Folder

Users can send the URL of a specific file or folder to another portal user. The recipient must have a login ID to your portal, as well as the appropriate access rights on the item. For example, the user could complete the steps below to paste the direct URL to a folder or file into an email. By sending the email to another user, that person would be able to click the URL in the email, and after logging in, land directly in the SFX directory of the file or folder belonging to the URL.
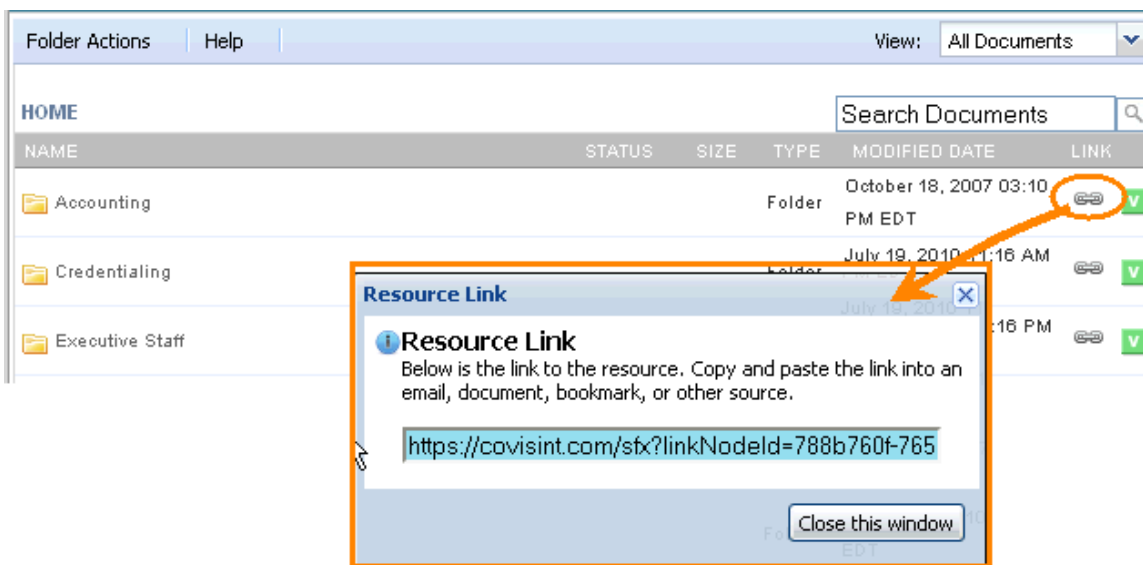
1. Navigate to the file or folder to which you want to embed a direct link in an email or other document.
2. Click the ⌨ link icon in the LINK column to the far right of the file or folder display window. The Resource Link window displays the URL of the item.
3. Copy the URL of the item.
4. Click **Close this window**.
5. Paste the URL where it is needed, such as within a document, email, etc.

   > ℹ️ Document recipients must have an SFX login with the required roles on your portal In order to view the item referred to by the link.

RESULT:

You have successfully sent a link to a file or folder.

View the complete user guide and additional support material:
- SFX for Healthcare: https://portal.covisint.com/web/supporthc/sfx
- SFX for Manufacturing: https://portal.covisint.com/web/supportauto/sfx