

Secure File Exchange User 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).

Tasks are listed in the order in which they are typically performed.

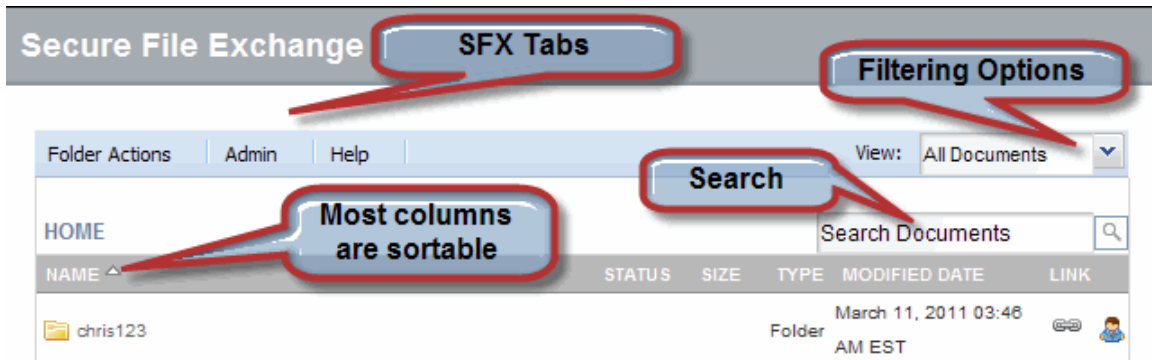
 TASK
<input type="checkbox"/> Review User Roles
<input type="checkbox"/> Review how to navigate in SFX
<input type="checkbox"/> Review the video, "Where are the Menu Options"
<input type="checkbox"/> Create Folders
<input type="checkbox"/> Add Files
<input type="checkbox"/> Update an Existing File
<input type="checkbox"/> Submit Draft for approval (if necessary)
<input type="checkbox"/> Set up Alerts
<input type="checkbox"/> Set up Favorites
<input type="checkbox"/> Modify Access to your Folders or Files (if necessary)
<input type="checkbox"/> Check files out / in (to edit as necessary)
<input type="checkbox"/> Approve Drafts (if you are an approver)
<input type="checkbox"/> Administer the Repository (add users, access rights, etc)

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

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.

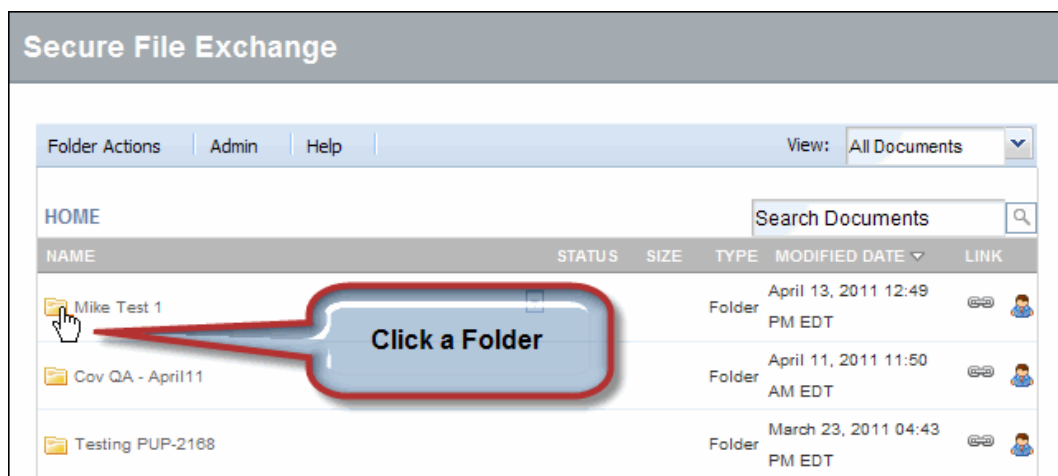
The following screen shot illustrates common SFX window elements.



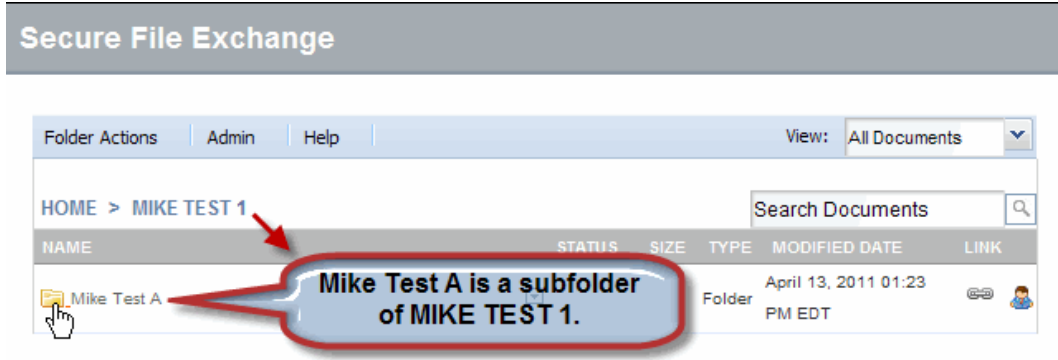
Navigate to a file by searching for it, or by drilling down into the folder structure.

To drill down into the folder structure:

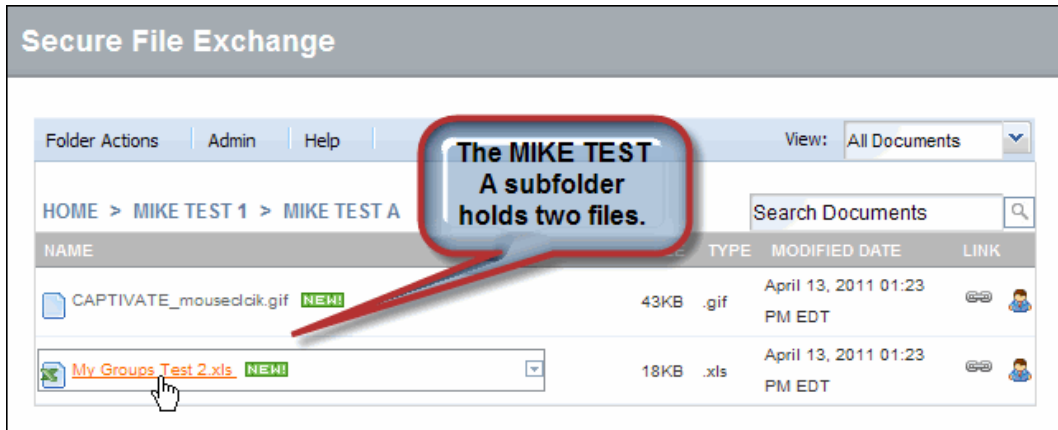
1. Click a folder from the Home Page. The folder contents display.



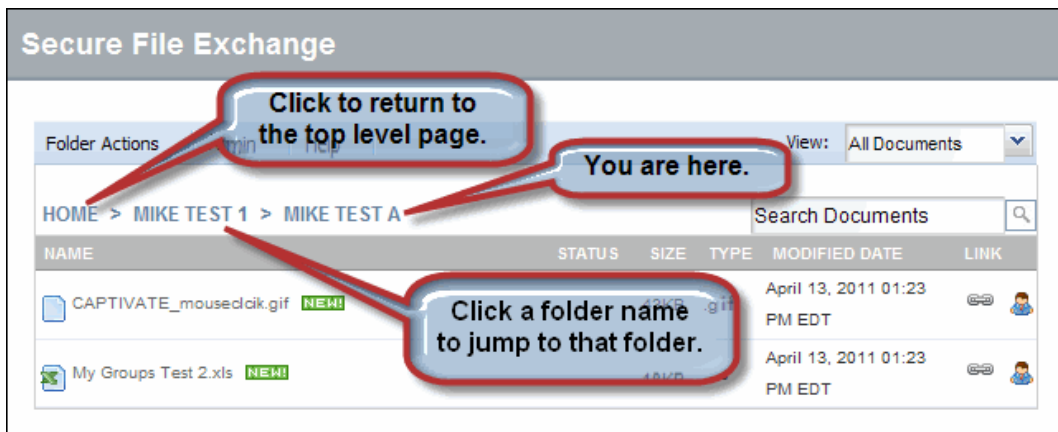
2. Select subfolders as required.



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.

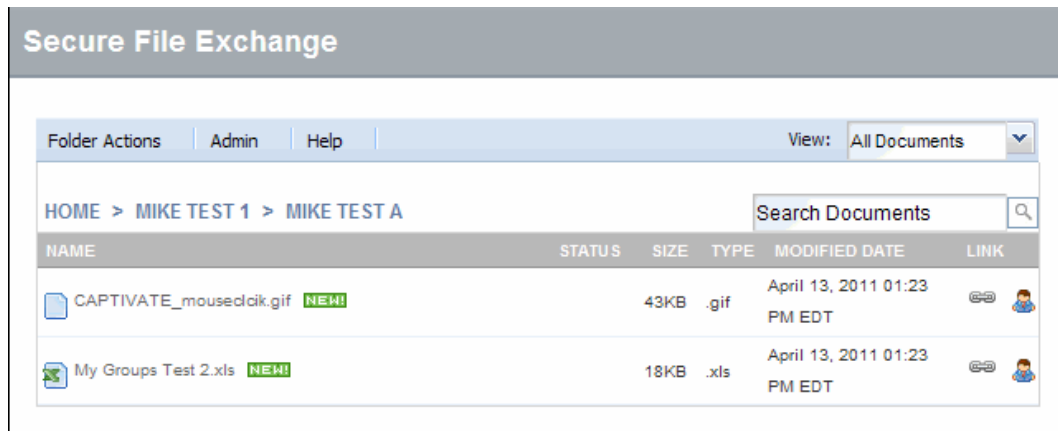


WHERE ARE THE MENU OPTIONS? WATCH HOW TO FIND THE MENU OPTIONS >>

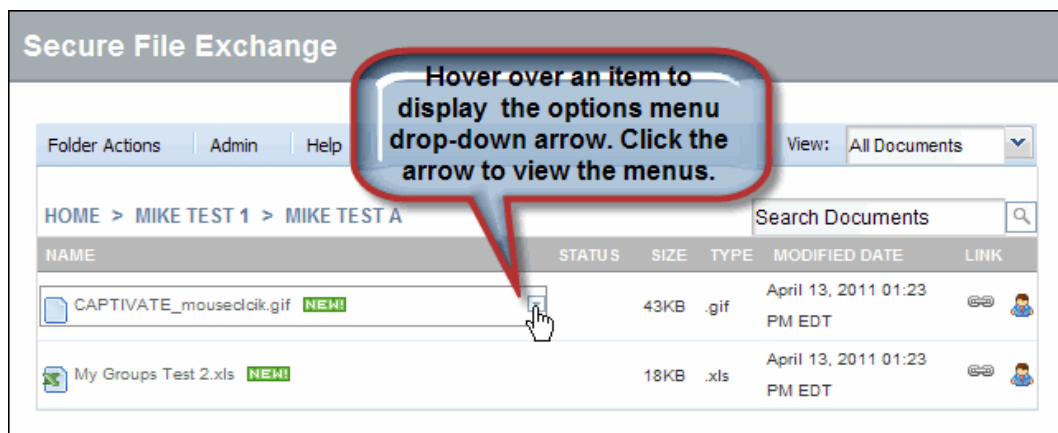
Most menu options are displayed by clicking the drop-down arrow located at the far right of the item.

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

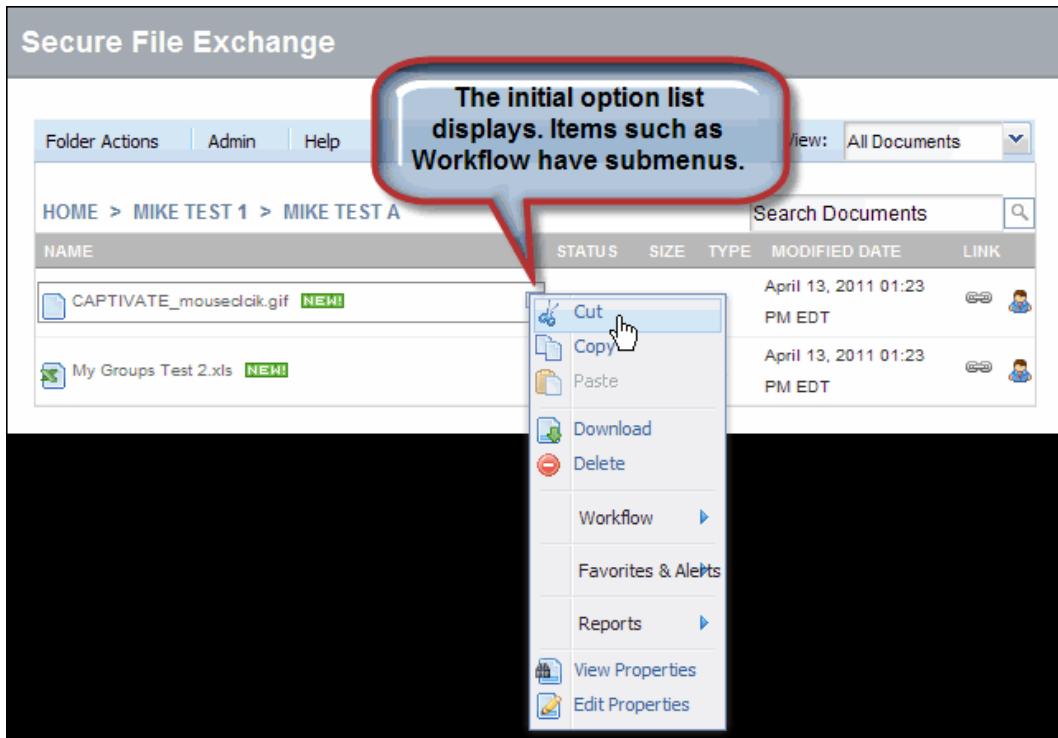
- An item's menu options are not always visible.



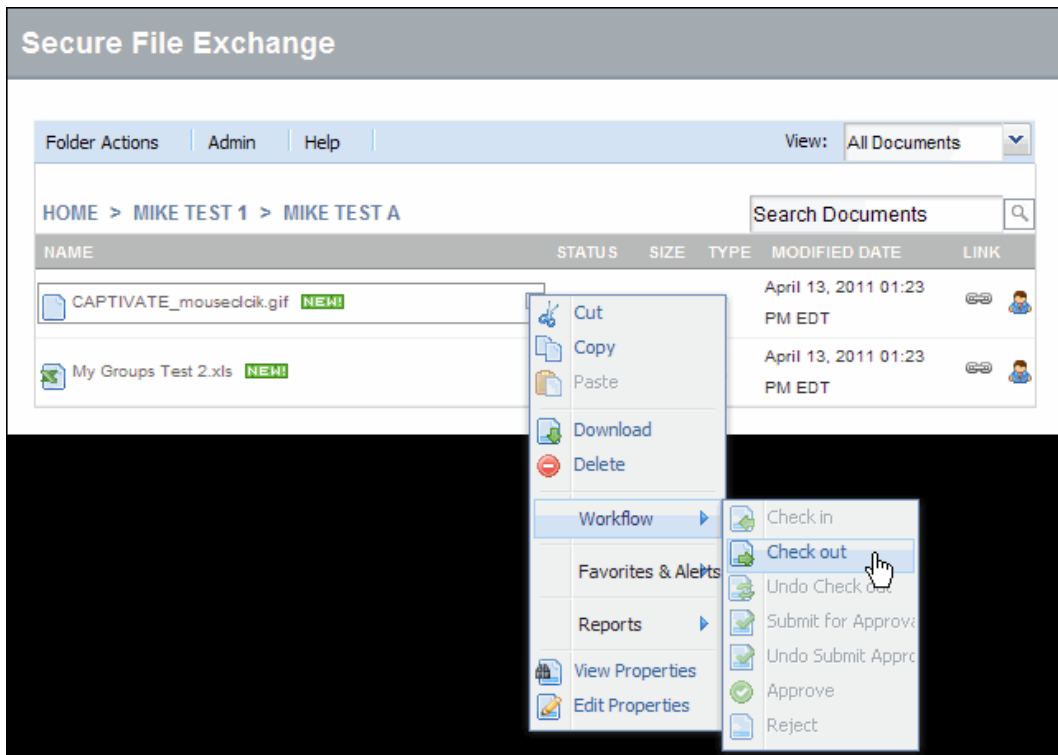
- When you hover the cursor over an item, its menu selection drop-down arrow displays.



- Clicking the arrow displays the initial list of menu options.



- Some menu options have submenus.



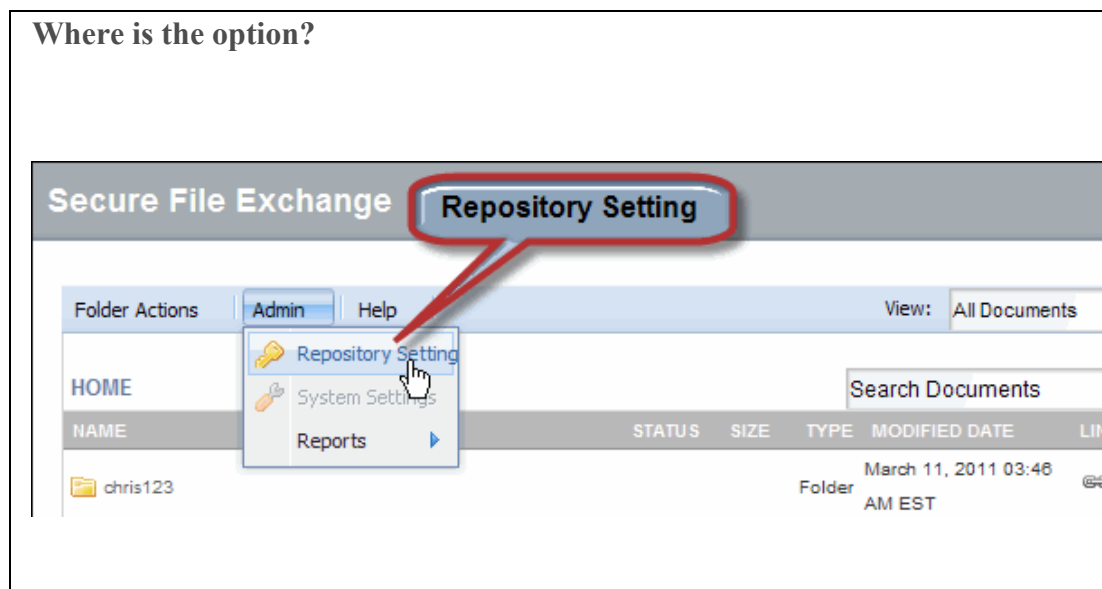
USER ROLES


Assigning Users to Roles in SFX Repository

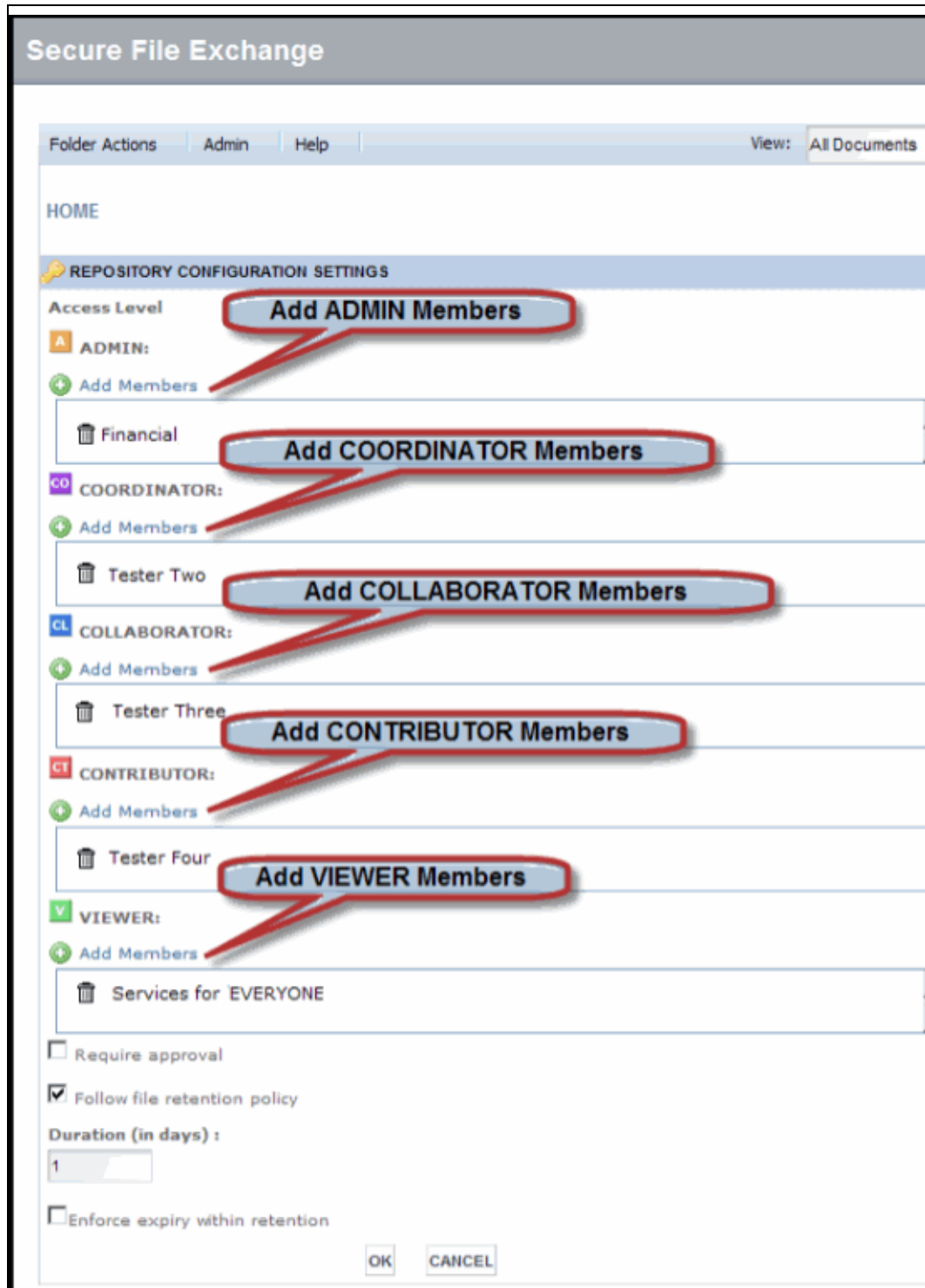
 This task can only be performed by an SFX Administrator.

Caution: Changes made to the Repository Settings impact everything from the top-level Home folder down. For example, if you add a user or group to the Administrator role, that user or group becomes an Administrator for the entire SFX instance.

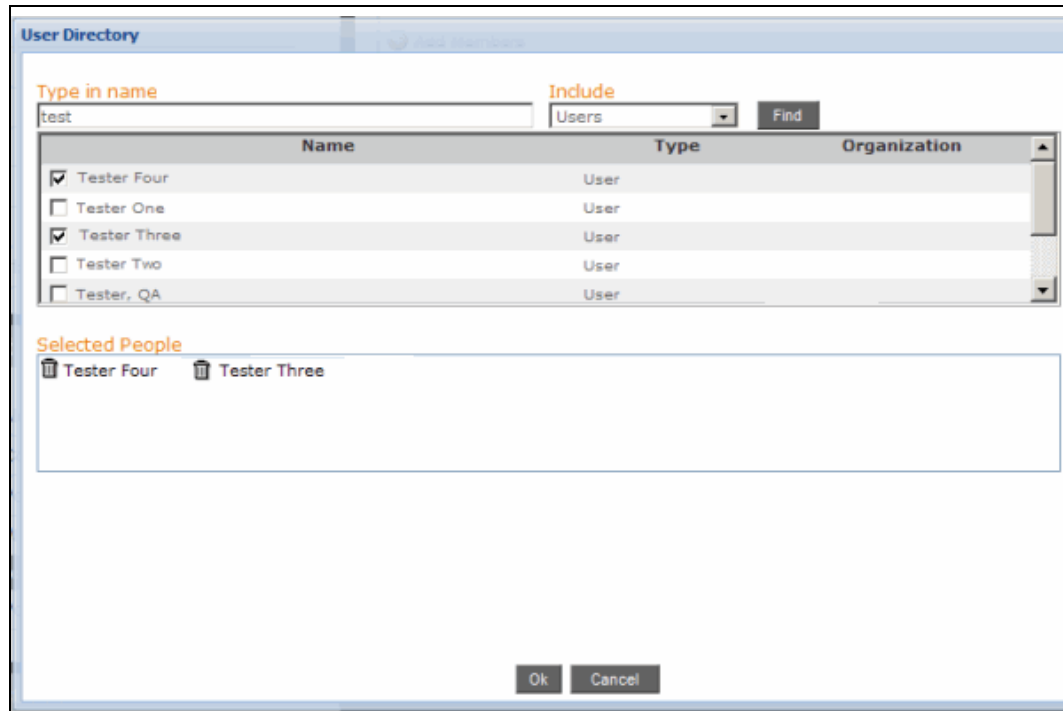
1. From the Admin menu, click **Repository Settings**.



2. Click  next to Add Members in the role type to which you wish to add users. The User Directory window displays.



3. Search for and Select the people you want to add to the role for which you clicked Add Members.



- a. Type the name (or partial name) of the user or group 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**.
 - c. Click **Find**. The screen refreshes, and the search results display.
 - d. Select the check box of each user or group you want to add to the selected SFX role. Checked users display in the Selected People list.
 - e. Click **OK**. The User Directory window closes and the users you added display in the appropriate role section under REPOSITORY CONFIGURATION SETTINGS.
4. Repeat steps 2 and 3 for each role to which you want to add users.
 5. Click **OK**. The SFX HOME page displays in your portal.

RESULT:

You have successfully added users to roles in SFX

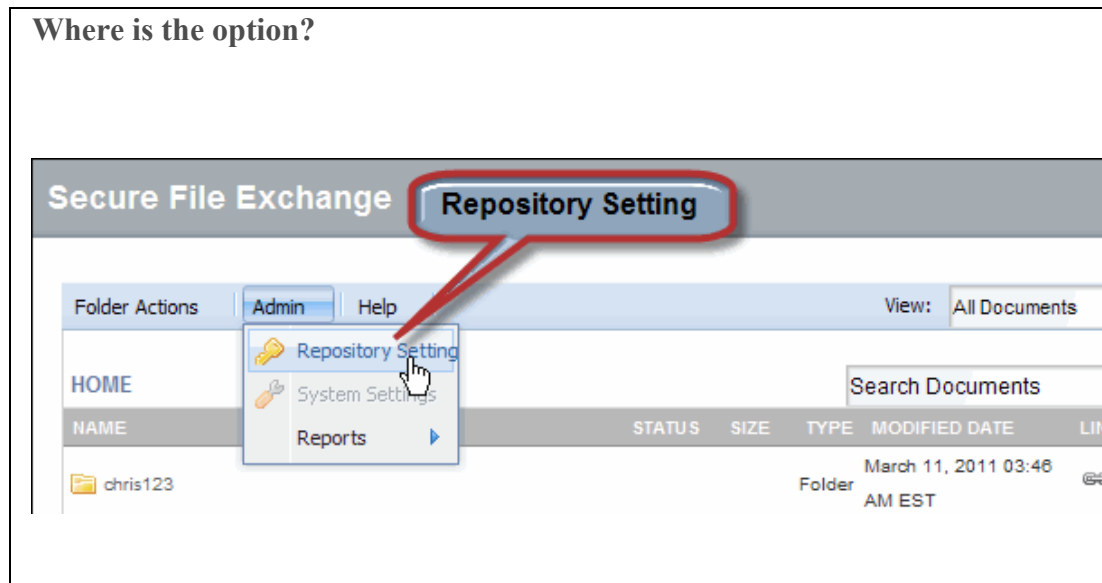
Removing Users and Groups from Roles in SFX Repository


 This task can only be performed by an SFX Administrator.

Caution: Removing Users and Groups at the repository level restricts them from accessing anything within SFX.

If you want to remove users or groups from particular files or folders, do not perform this procedure. Instead, modify access rights to the item.

1. From the Admin menu, click **Repository Settings**. The Repository Configuration Settings window displays.



2. Click the wastebasket icon  next to the name of each user or group you want to remove.

The screenshot shows the 'Secure File Exchange' interface. At the top, there are navigation links for 'Folder Actions', 'Admin', and 'Help', and a 'View: All Documents' dropdown. Below this is a 'HOME' section and a 'REPOSITORY CONFIGURATION SETTINGS' section. The settings are organized into five user role categories: ADMIN, COORDINATOR, COLLABORATOR, CONTRIBUTOR, and VIEWER. Each category has an 'Add Members' button and a list of members with delete icons. A red callout box with the text 'Click to delete' points to the delete icons for 'Clar' in the ADMIN section and 'Tester Two' in the COORDINATOR section. At the bottom of the settings, there are checkboxes for 'Require approval', 'Follow file retention policy', and 'Enforce expiry within retention', along with a 'Duration (in days)' input field set to '1'. 'OK' and 'CANCEL' buttons are at the bottom right.

3. Click **OK**.








RESULT:

You have successfully removed users from roles in SFX.

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
 VIEWER	Viewers can view and download files and folders.
 CONTRIBUTOR	Contributors can view, download, and create files and folders, in addition to performing Owner tasks on their files and folders.
 COLLABORATOR	Collaborators can view, download, create, and update files and folders.
 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.
 ADMIN	Administrators can perform a wide range of tasks, such as: <ul style="list-style-type: none"> • 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.

-

Roles and Privileges on Files

The following table indicates which file operations can be performed by the various roles.



Note: The Admin role is not shown in the table. The Admin role can perform all the listed actions, plus:

- Change file ownership
- Configure global settings that impact all repository users

ACTION:	Viewer	Contributor	Collaborator	Coordinator	Owner
View	•	•	•	•	•
Cut		•(if owner)	•	•	•
Copy	•	•	•	•	•
Paste	•	•	•	•	•
Update		•	•	•	•
Download	•	•	•	•	•
Delete		•(if owner)	•	•	•
Workflow (cascading menu)					
Check In		•(if owner)	•	•	•
Check Out		•(if owner)	•	•	•
Undo Check Out		•(if owner)	•	•	•
Submit for Approval		•(if owner)	•	•	•
Undo Submit for Approval		•(if owner)	•	•	•
Approve			•(if owner)	•(if owner)	•(if owner)
Reject			•(if owner)	•(if owner)	•(if owner)
Favorites (cascading menu)					

menu)					
Add to My Favorites	•	•	•	•	•
Remove from Favorites	•	•	•	•	•
Set Alert	•	•	•	•	•
Reports (cascading menu)					
View Version History	•	•	•	•	•
View Previous Version	•	•	•	•	•
Restore Previous Version		•(if owner)	•	•	•
View Audit Log		•(if owner)	•	•	•
View Properties	•	•	•	•	•
Edit Properties		•(if owner)		•	•
Edit name, description, and keywords		•(if owner)		•	•
Enable or disable approval workflow		•(if owner)		•	•
Manage effective dates		•(if owner)		•	•
Manage access		•(if owner)		•	•

Roles and Privileges on Folders

The following table indicates which folder operations can be performed by the various roles.



Note: The Admin role is not shown in the table. The Admin role can perform all the listed actions, plus:

- Assign fax numbers to folders
- Change folder ownership
- Configure global settings that impact all repository users

ACTION:	Viewer	Contributor	Collaborator	Coordinator	Owner
View	•	•	•	•	•
Add new folders and files		•	•	•	•
Cut		•(if owner)	•(if owner)	•	
Copy	•	•	•	•	•
Paste		•	•	•	•
Download folder as *.zip file	•	•	•	•	•
Delete		•(if owner)	•(if owner)	•	•
Favorites (cascading menu)					
Add to My Favorites	•	•	•	•	•
Remove from Favorites	•	•	•	•	•
Set Alert	•	•	•	•	•
View Properties	•	•	•	•	•
Edit Properties		•(if owner)	•(if owner)	•	•
Edit name, description, and keywords		•(if owner)	•(if owner)	•	•
Enable or disable		•(if owner)	•(if owner)	•	•

**approval
workflow**

**Manage
access**

•(if owner)

•(if owner)

•

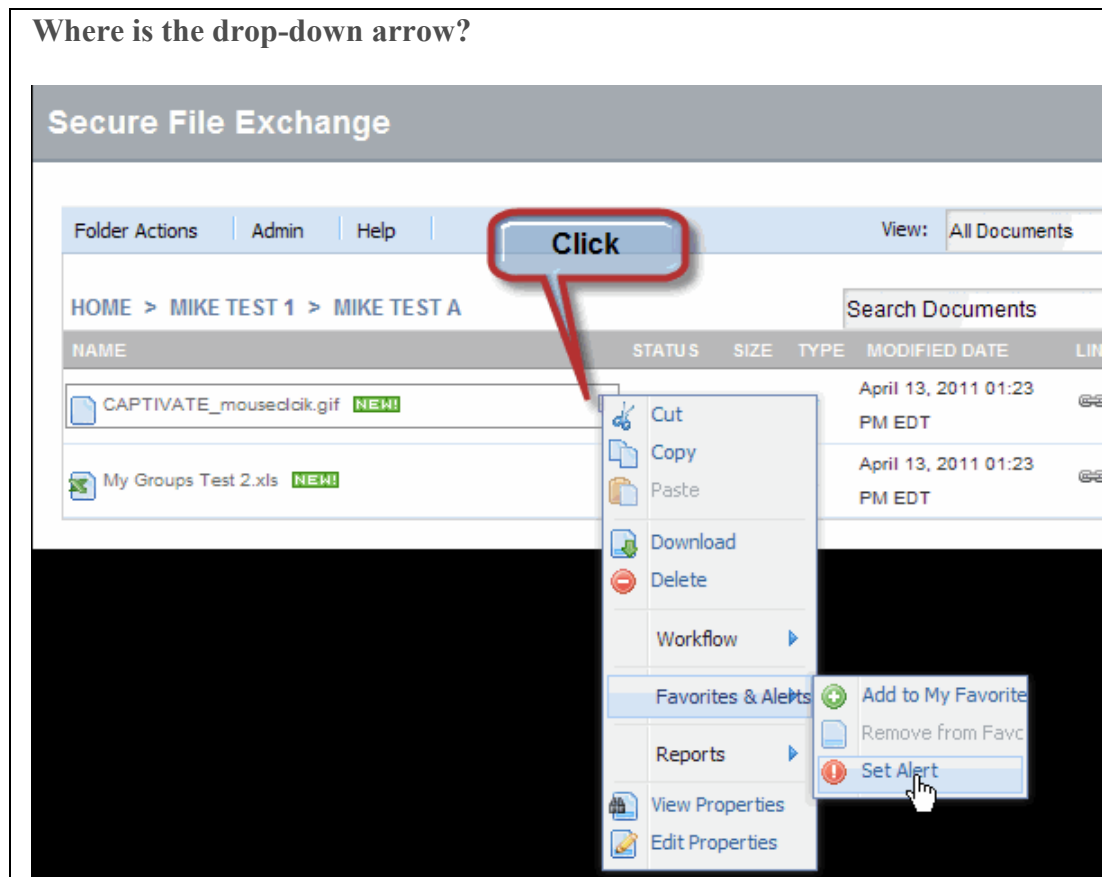
•

STUFF VIEWERS CAN DO

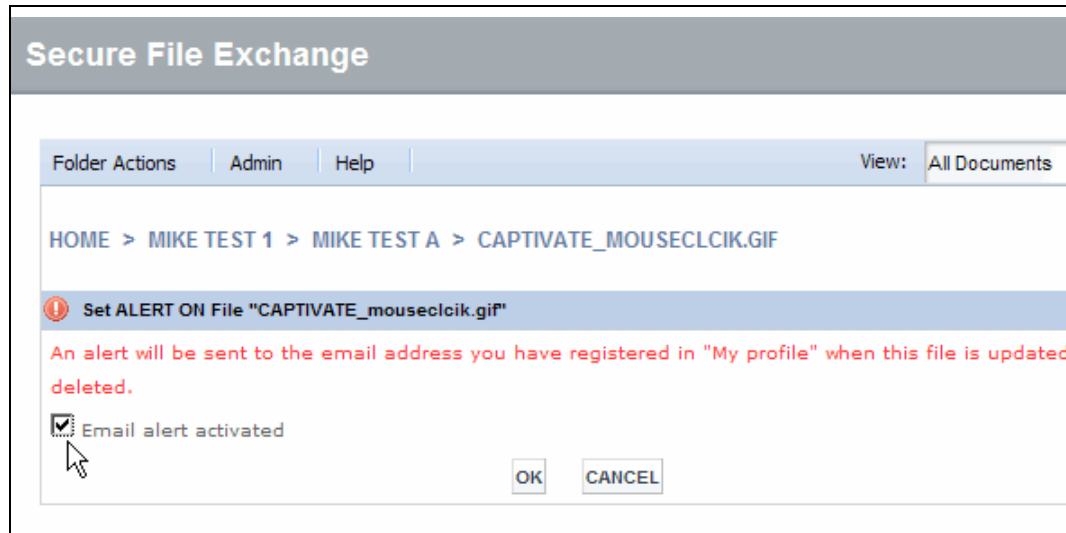
Alerts

Removing an Alert

1. Navigate to the item from which you want to remove an alert.
2. Click the drop-down arrow at the far right of the file name.



3. From the Favorites and Alerts menu option, click **Set alert**. The *Set ALERT ON File...* screen displays.
4. Clear the **Email alert activated** check box.



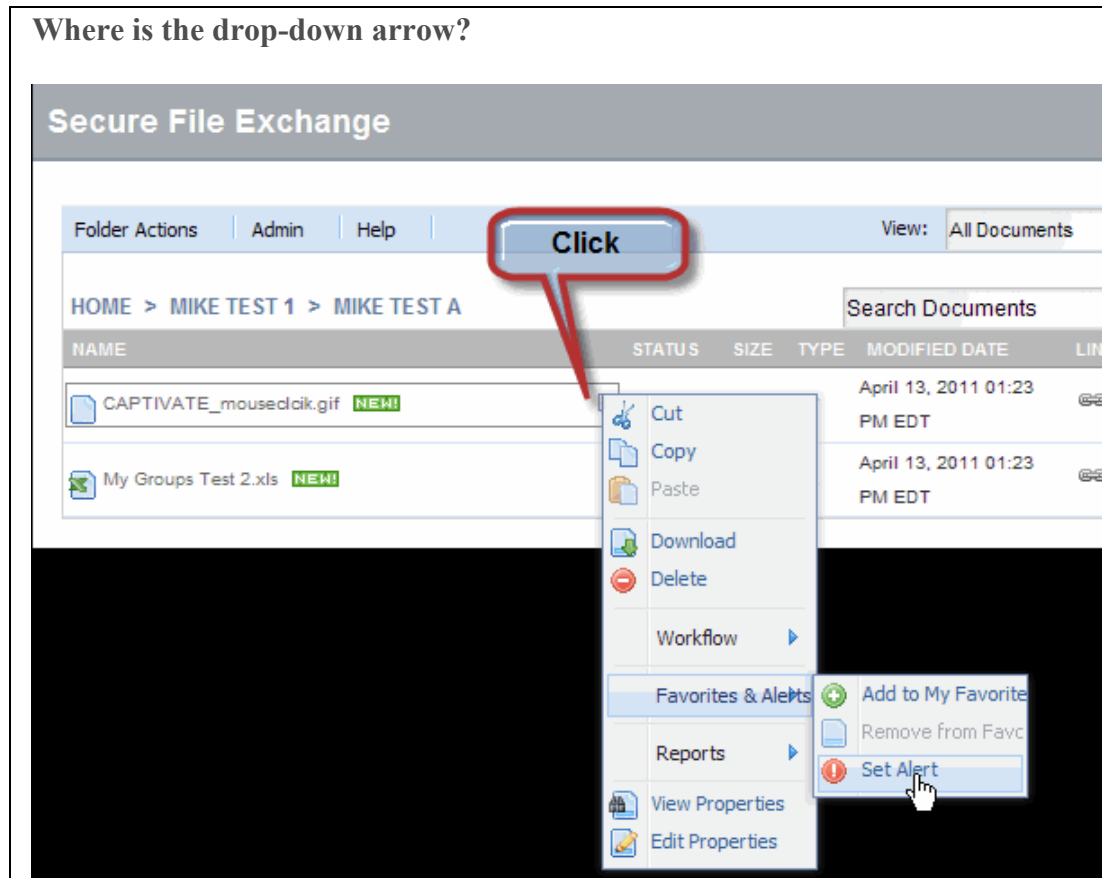
5. Click **OK**. Alerts will no longer be sent to your email account when the item is modified.

RESULT:

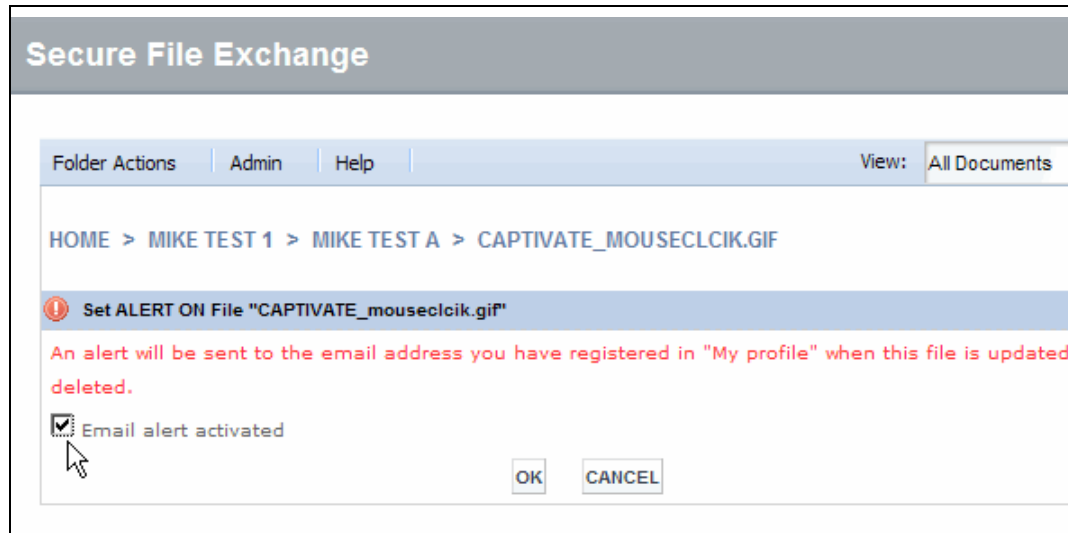
You have removed an alert.

Setting an Alert

1. Navigate to the item for which you want to set an alert.
2. Click the drop-down arrow at the far right of the file name.



3. From the Favorites and Alerts menu option, click **Set alert**. The *Set ALERT ON File...* screen displays.
4. Select the **Email alert activated** check box.



5. Click **OK**. An alert will be sent to your email account each time the item is modified.

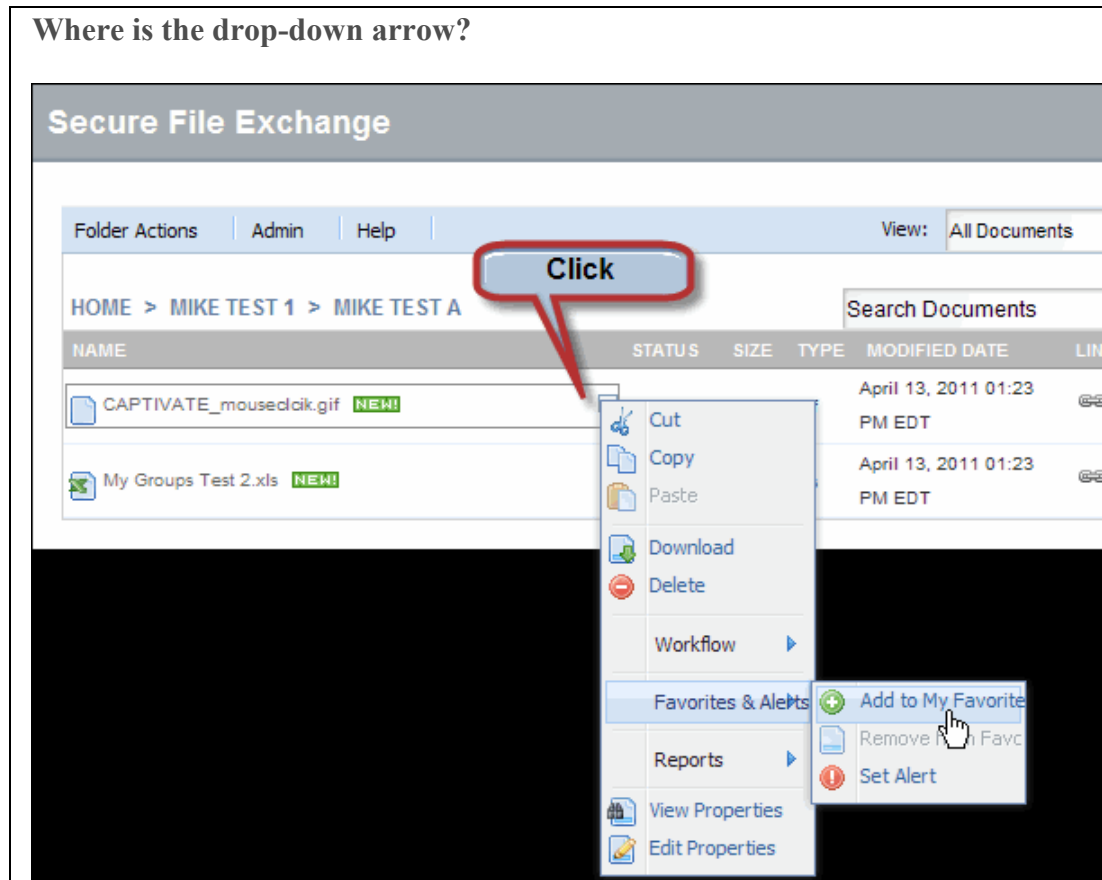
RESULT:

You have set an alert on an item.

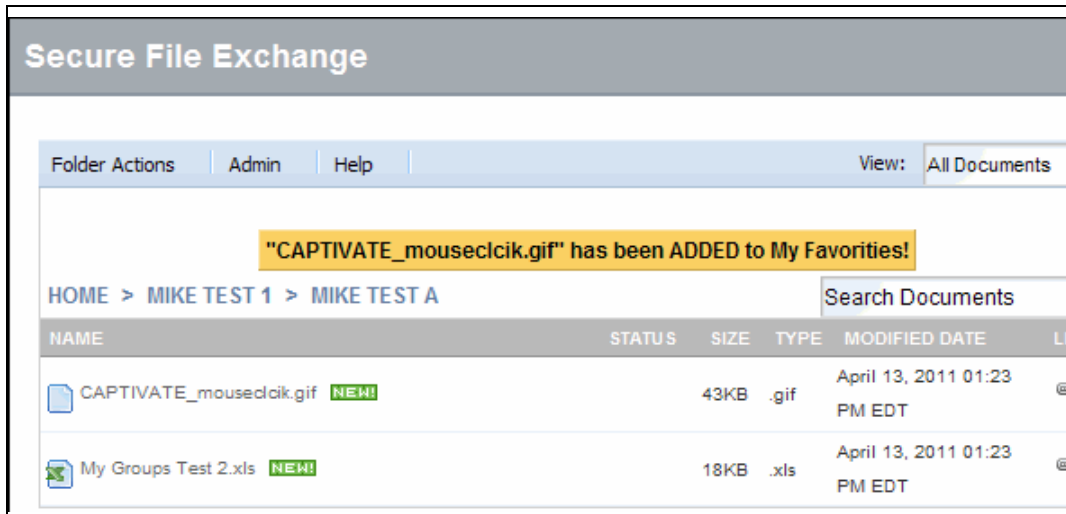
Favorites Menu

Adding an Item to "My Favorites" List

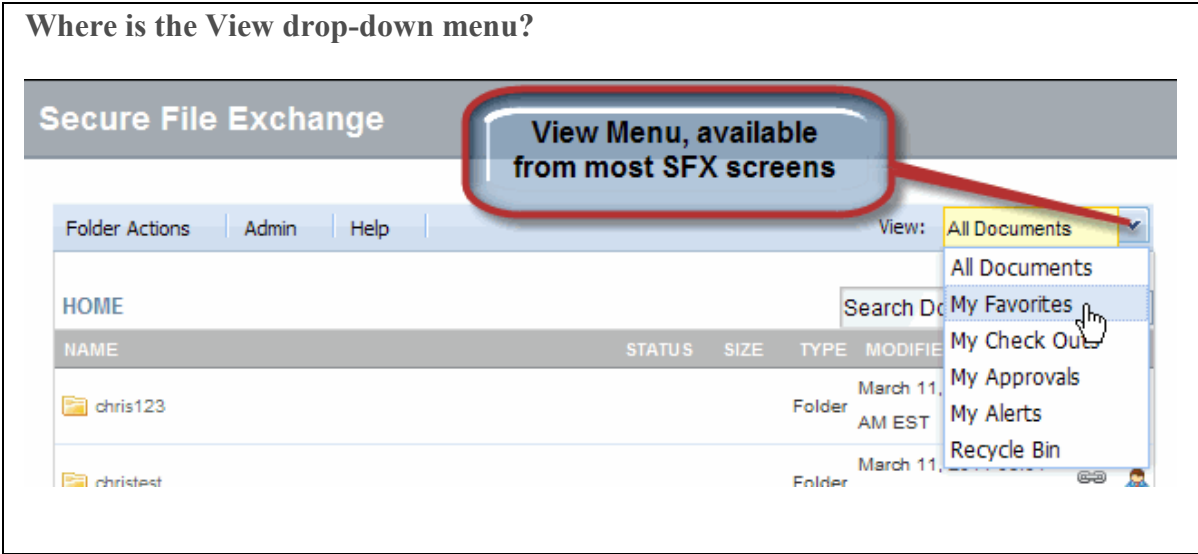
1. Navigate to the file or folder you want to add to your Favorites list.
2. Click the drop-down arrow at the right of the item's name.



3. From the Favorites and Alerts menu option, click **Add to My Favorites**. A confirmation message displays.



The file or folder will appear in the favorites list when you select 'My Favorites' from the View drop-down menu.

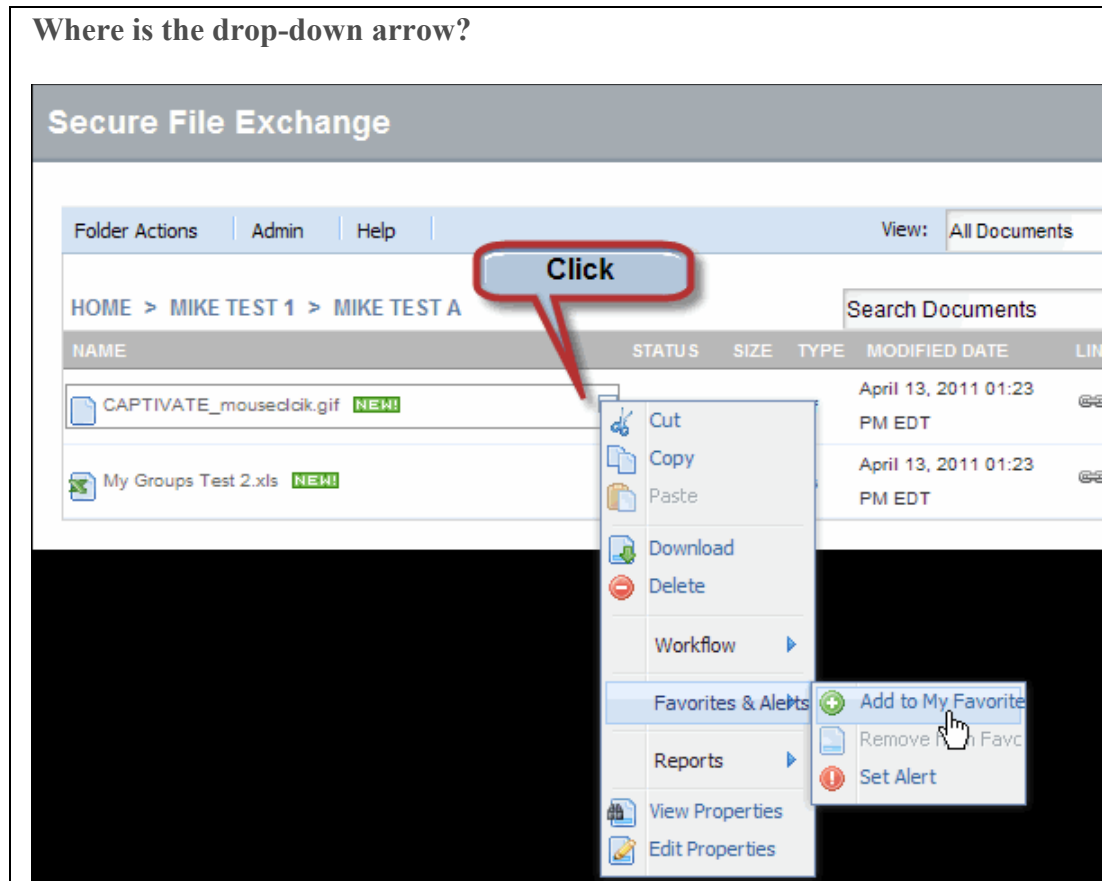


RESULT:

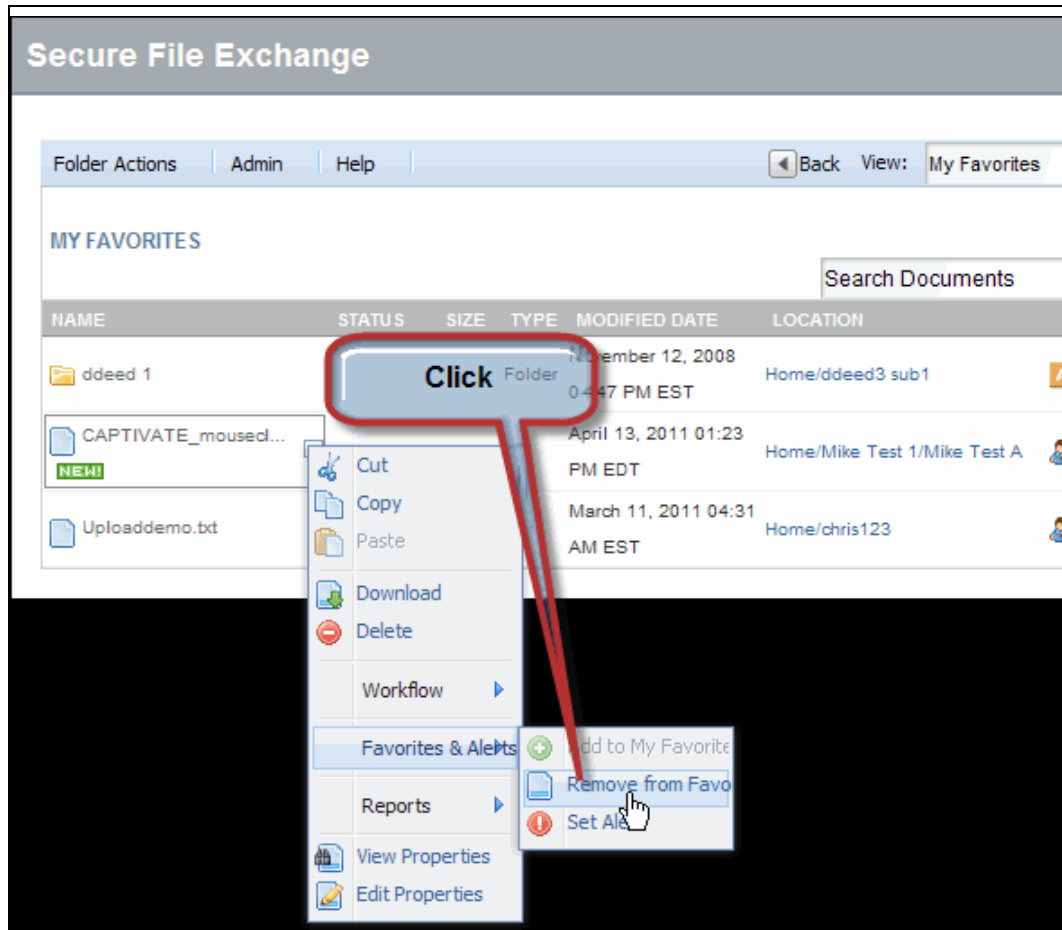
You have successfully added an item to favorites list.

Removing an Item from My Favorites List

1. Navigate to the item you want to remove from your Favorites list.
2. Click the drop-down arrow at the far right of the file name.

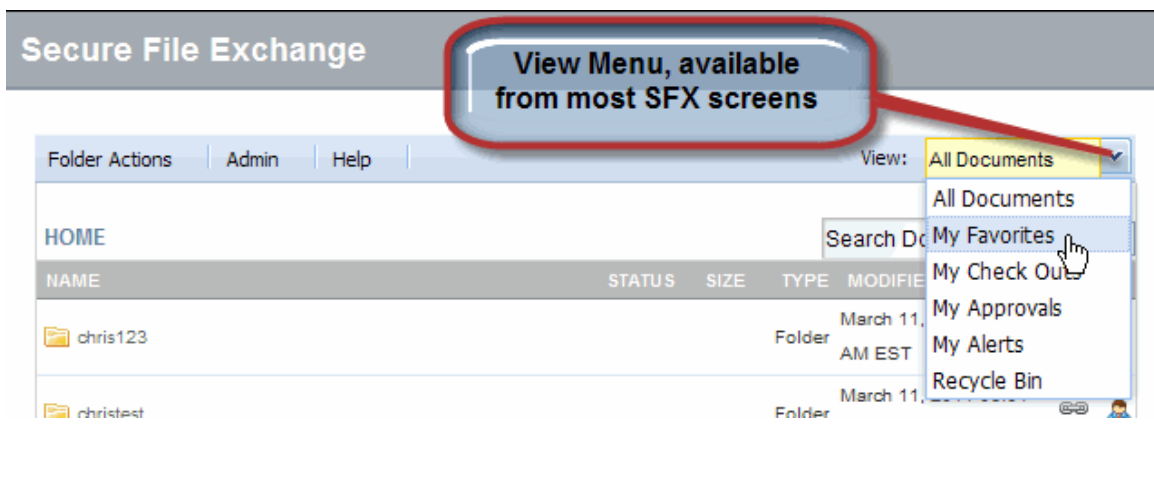


3. From the Favorites and Alerts menu option, click **Remove from Favorites**. A confirmation message displays.



This file or folder will no longer appear in the list when you select 'My Favorites' from the View drop-down menu.

Where is the View drop-down menu?

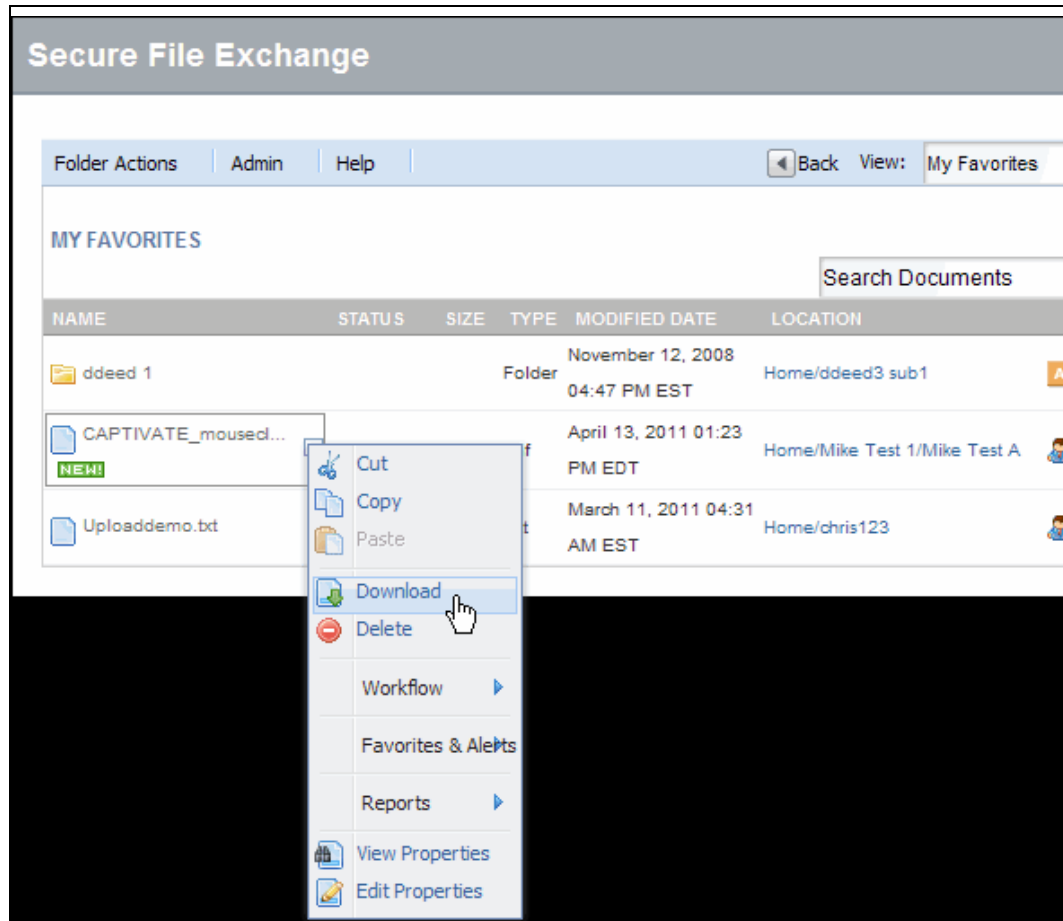


RESULT:

You have successfully removed an item to favorites list.

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:

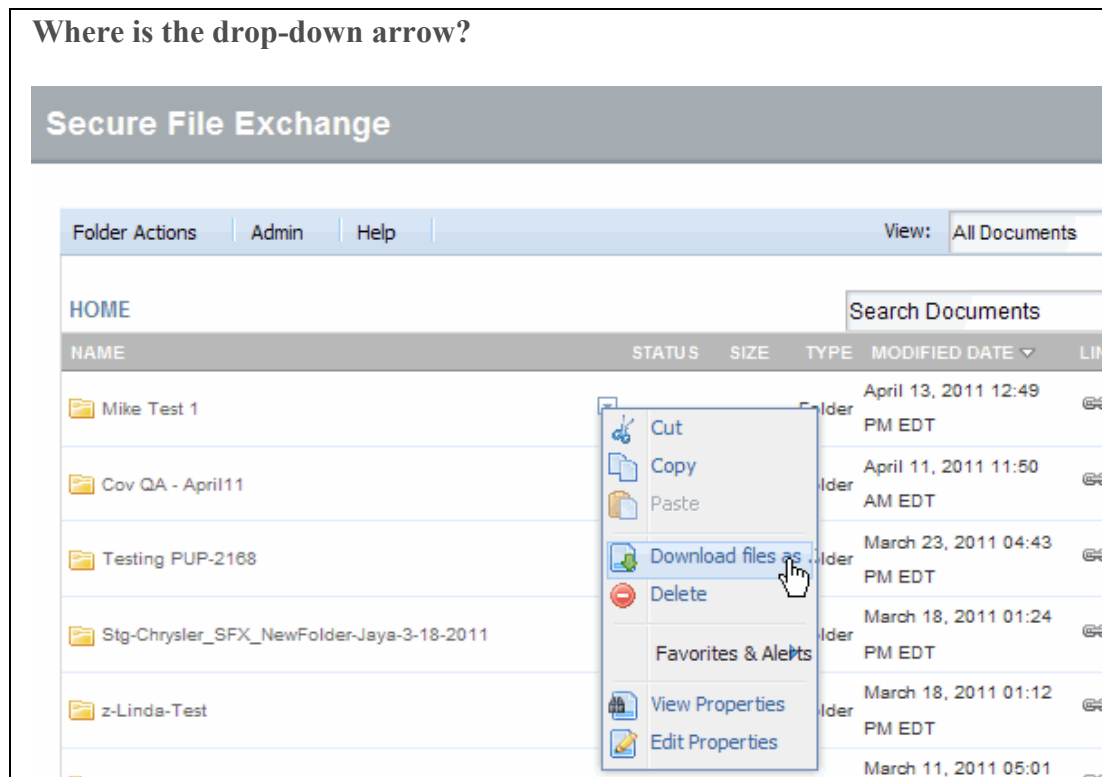
You have successfully downloaded a document.

Downloading a Folder and its Files

 This task does not download subfolders and their contents. You can perform this task only to download the files that are stored directly under a folder. For example, If *My Folder 1* contains only folders, you cannot download *My Folders 1*, even if its subfolders contain files.

You can download a folder and the files stored directly under it as a zip file.

1. Navigate to the folder you want to download.
2. Click the drop-down arrow at the far right of the file name.



3. Click **Download files as...**
4. The system generates a zip file of the files within the folder and prompts you to open or save the file. Click **Save**.
5. Navigate to the location to which you want to save the generated zip file and click **OK**. The zip file is saved.

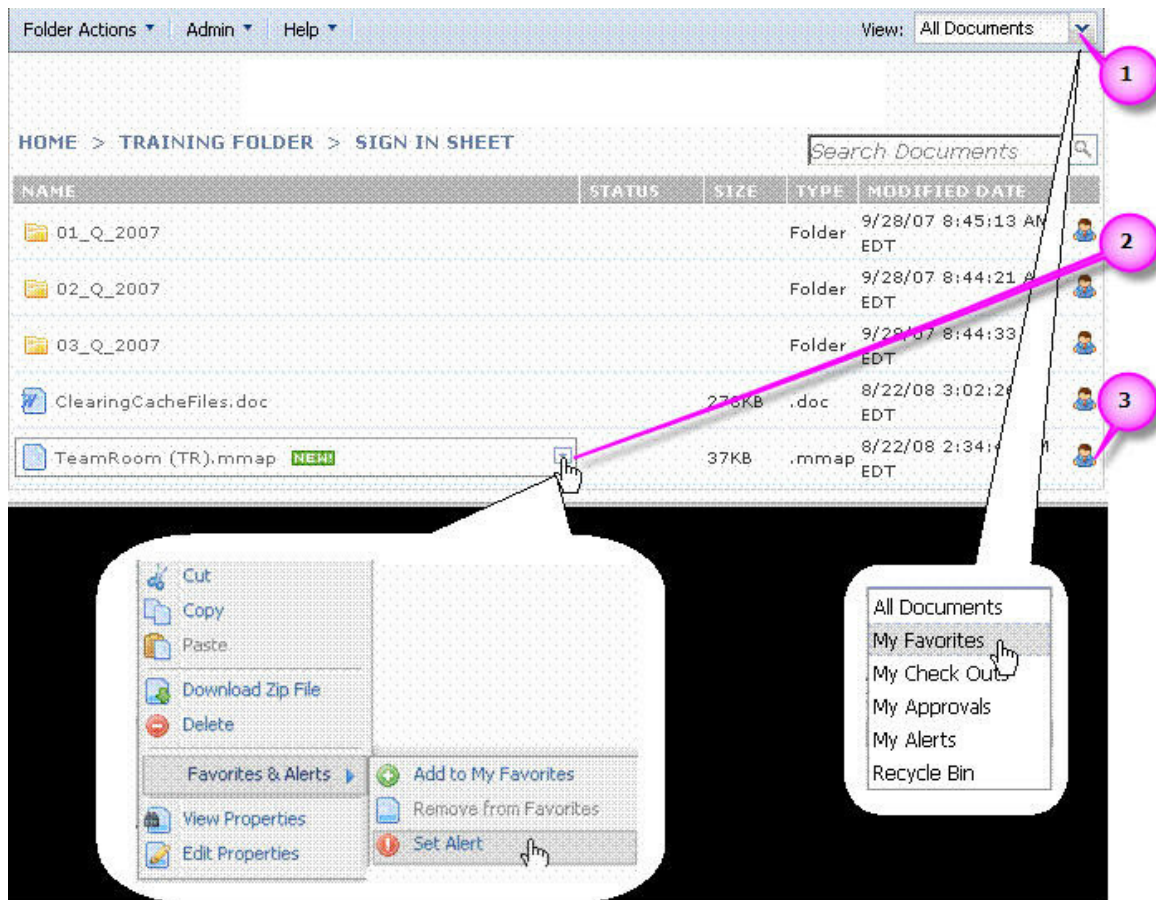
RESULT:

You have successfully downloaded a folder and its contents.

Viewer Tasks

Every SFX user can perform tasks permitted by the Viewer role. Some users are assigned roles that permit additional tasks.

Review this section and its related topics before performing tasks assigned to additional user roles. For more information, refer to Roles and Privileges on Files and Roles and Privileges on Folders.



Legend:

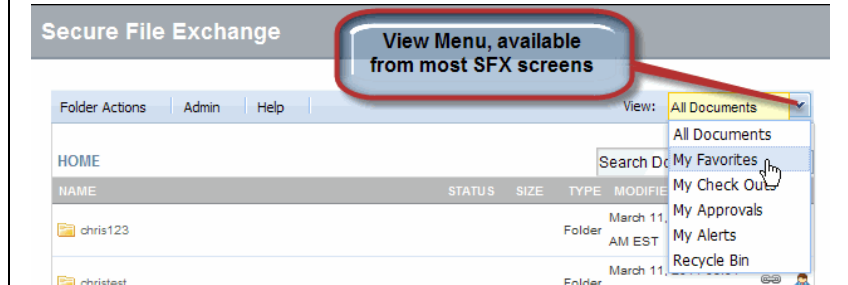
Viewing Files/Folders

1

1. Click on the View drop-down arrow to the right of the 'view' window.

Where is the View drop-down menu?

The **View** drop-down menu is displayed in the upper right corner of the toolbar:



2. Select the 'view by' filter from the menu.

Managing Files and Folders

2.
 1. Take action on a file or folder by clicking the drop down arrow to the right of the file/folder.
 2. Some menu options have additional submenus, such as Favorites.

Identifying Your Role

3.
 1. Icons indicate your role on an item. Hover your mouse over the icon for details.
 2. The 'person' icon indicates you are the owner of the item.
-

Viewing a File or Folder

1. Drill down into the folder structure until you reach the desired file or folder.
2. Click a *folder name* to display the folder's contents.
3. To view a file, click the *file name* and follow your PC's prompts to open or save the file.



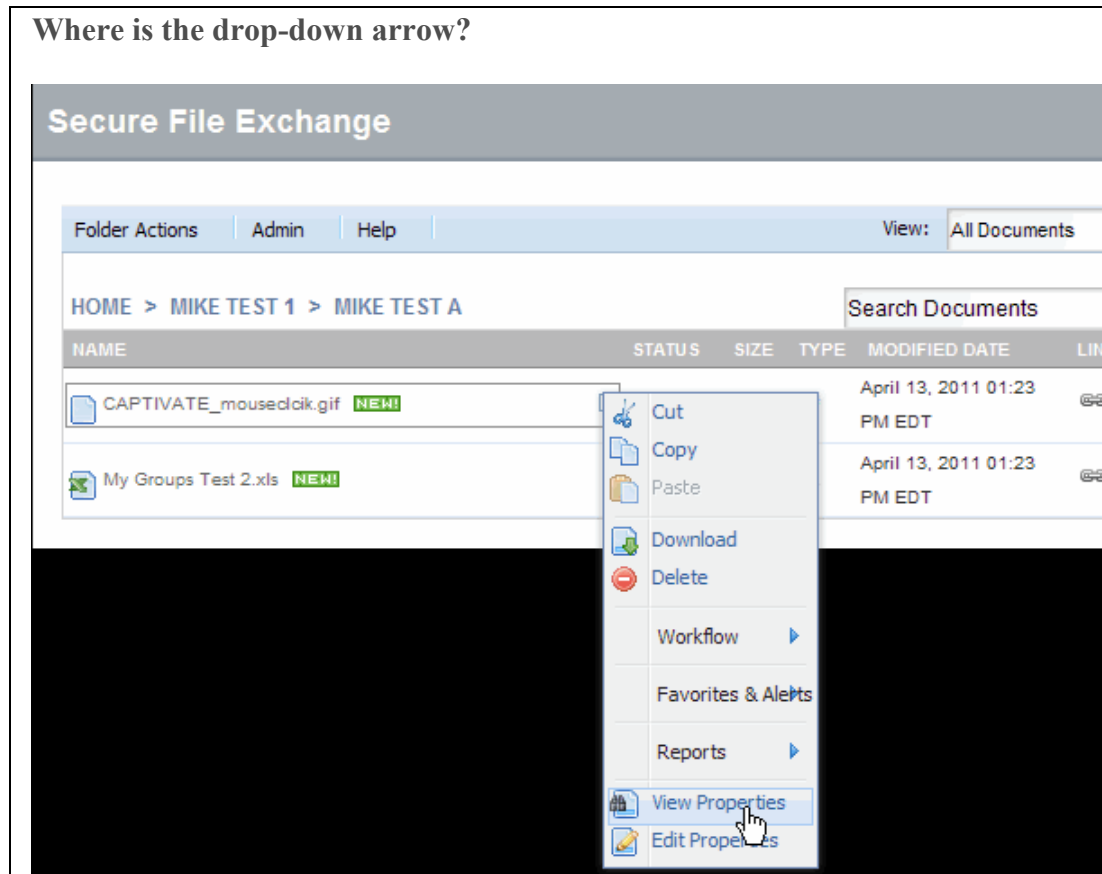
Some files may have expiration dates. When the file is expired, it is removed from view for users who have only the Viewer role.

RESULT:

You have successfully viewed a file or folder.

Viewing Access Rights of Others on an Item

1. Click the drop-down arrow at the far right of the file or folder name.



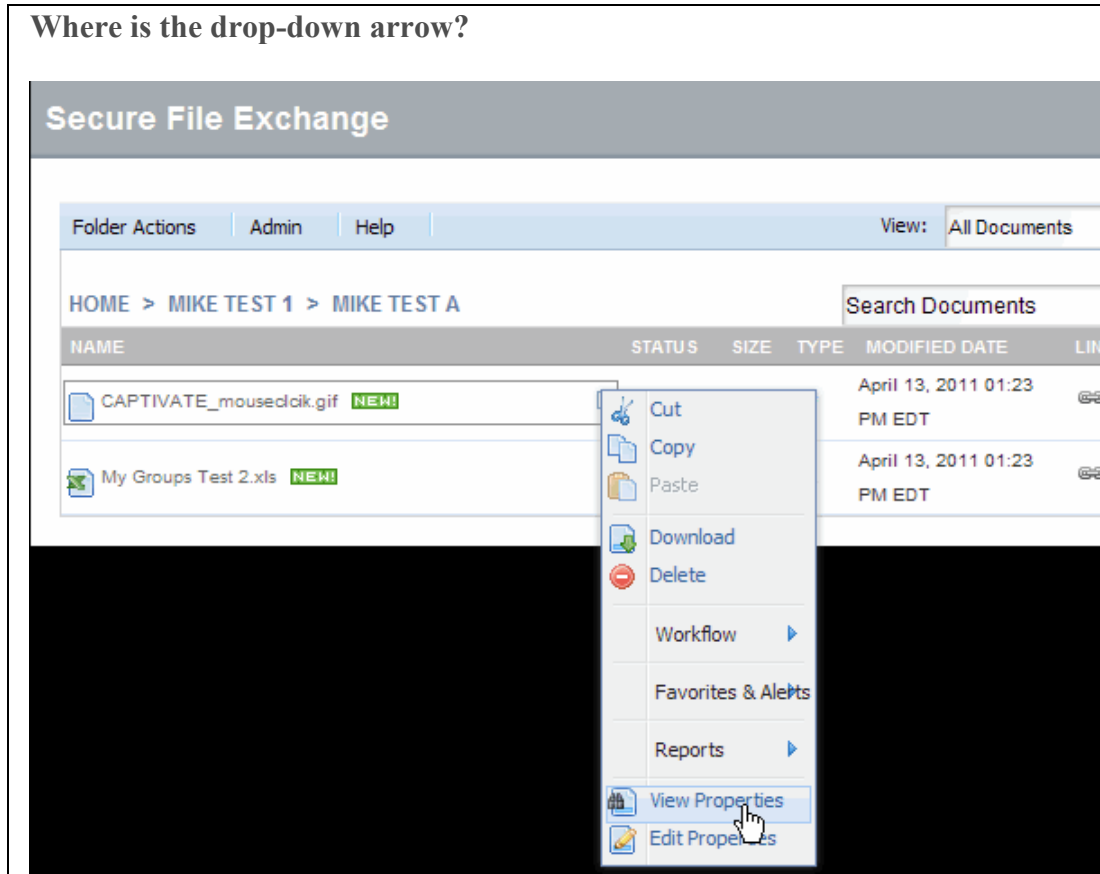
2. Click **View Properties**. A list of users per role is displayed.
3. Click **OK** when finished viewing.

RESULT:

You have successfully viewed access rights.

Viewing Properties

1. Click the drop-down arrow at the far right of the file name.



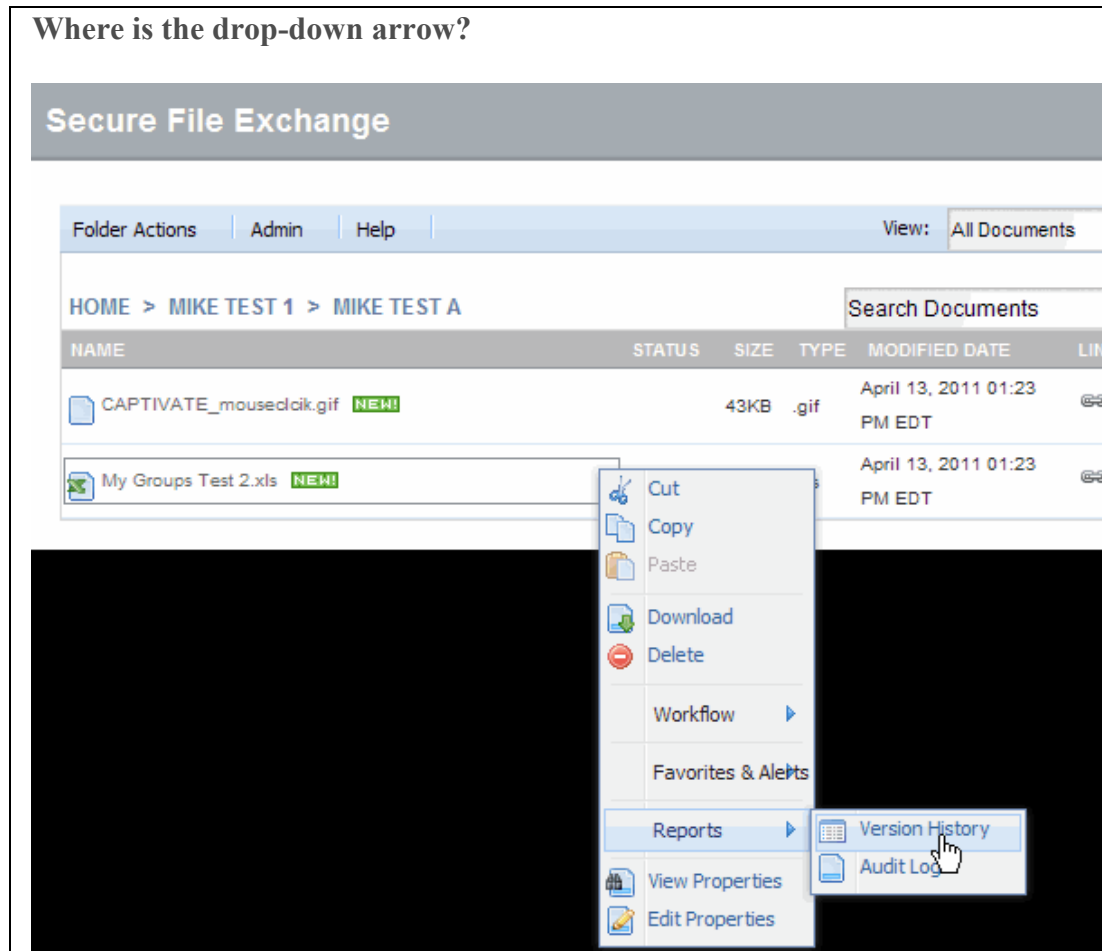
2. Click **View Properties** from the menu.
3. When you are finished viewing the properties, click **OK** to return to the file list screen.

RESULT:

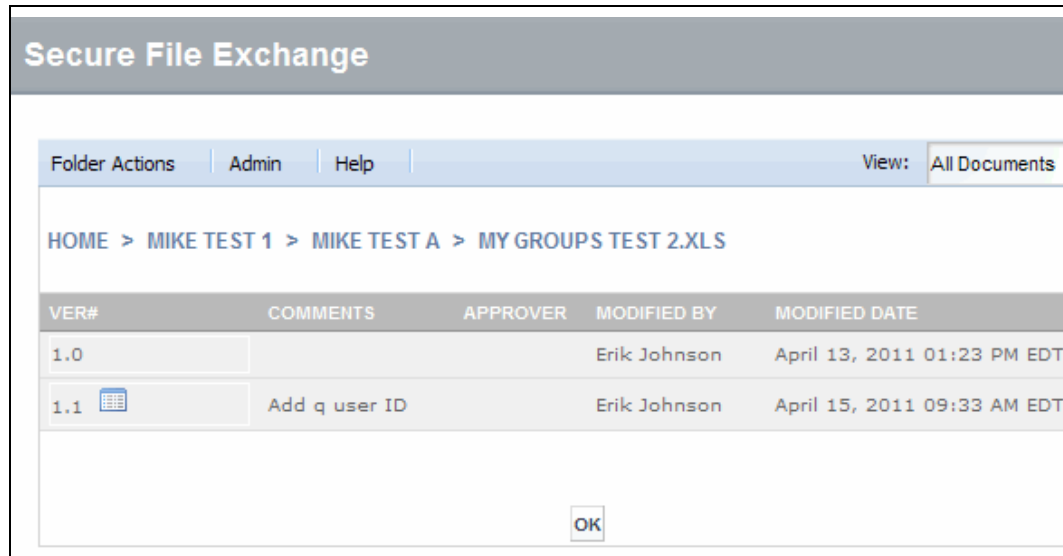
You have successfully viewed file/folder properties.

Viewing Version History

1. Click the drop-down arrow at the far right of the file name.



2. Select **Reports -> Version History**. The file's version history displays.



- When you are finished viewing the history, click **OK** to return to the file list screen.

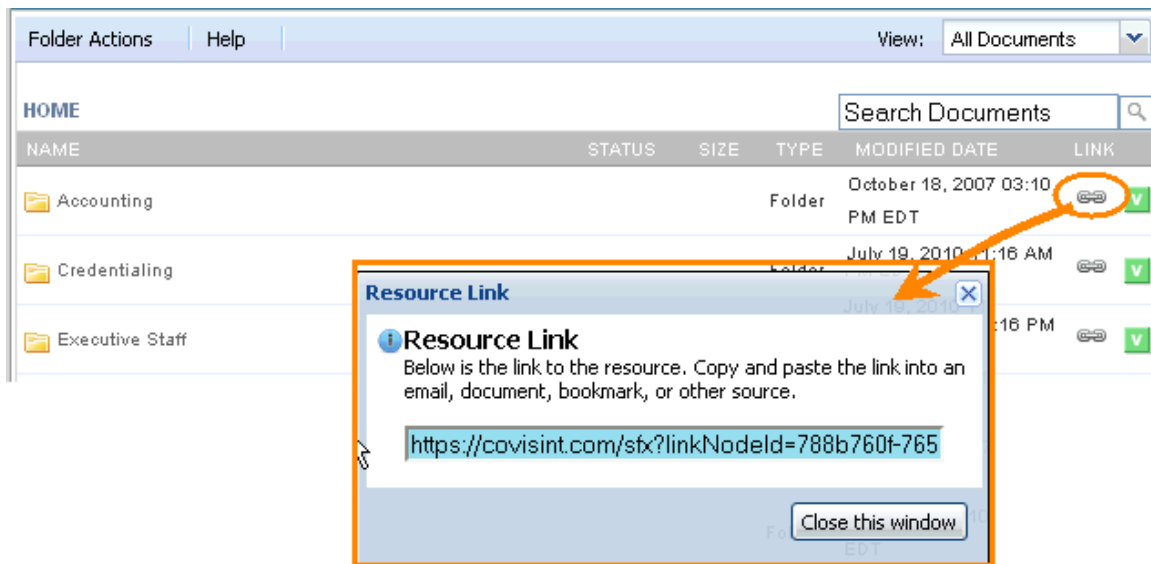
RESULT:


You have successfully viewed version history.


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.

 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.

WORKING WITH FILES

File Workflows

 Some organizations do not implement the "Approval Required" workflow option.

If your implementation does not support the Approval Required workflow, you will not see the approval-related options referred to in some procedures. You will follow the process described in the "No Approval Required" workflow.

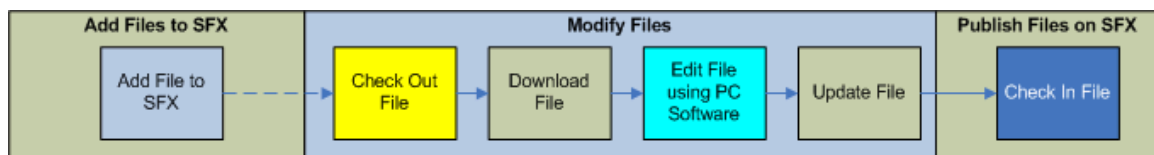
If your organization's implementation supports the "Approval Required" workflow, there are options for how it can be configured by your administrator:


- Approval can be required for all files in the repository. In this case you must always follow the "Approval Required" workflow.
- Approval can be required for certain files, depending on file property settings. In this case, you will alternate between the "Approval Required" and the "No Approval Required" workflows as required by each file's properties.

 If you are not sure which workflow to follow for a specific file, view the file properties.

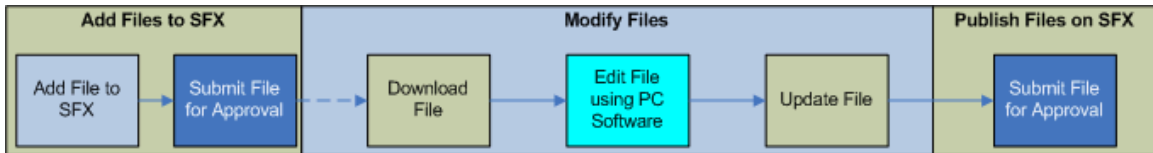
- If the "Require Approval" check box is **not** selected, follow the "No Approval Required" flow.
- If the "Require Approval" check box is selected, follow the "Approval Required" flow.


No Approval Required Workflow



 "Edit File using PC Software" is a process you perform with your PC and the appropriate software required to edit the downloaded source file. It is not an SFX task.

Approval Required Workflow



 "Edit File using PC Software" is a process you perform with your PC and the appropriate software required to edit the downloaded source file. It is not an SFX task.

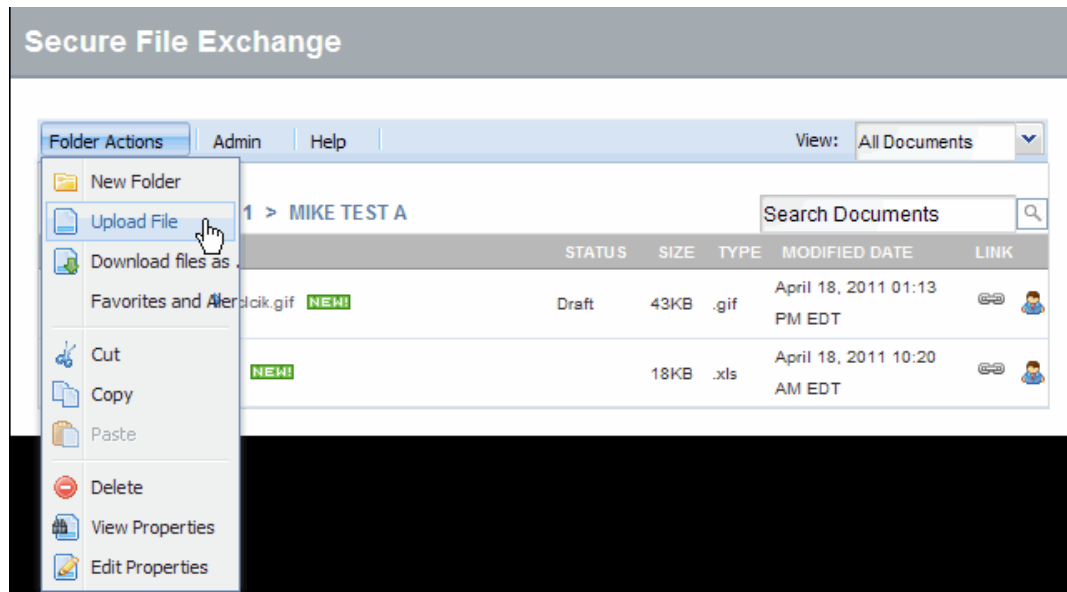
Adding or Uploading a New File

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.

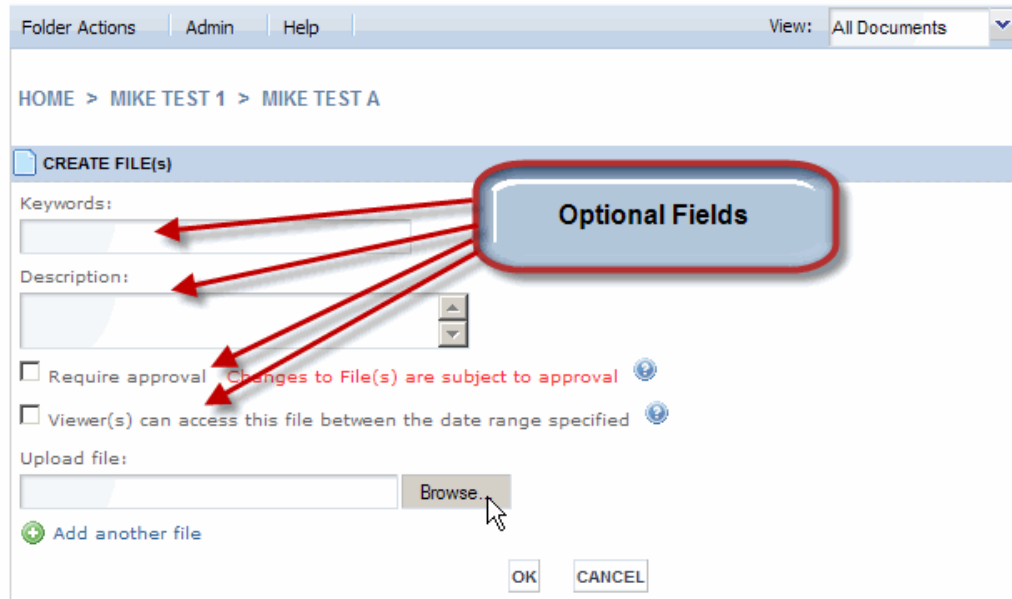
1. Navigate to the folder to which you want to upload the file. (Or create a new folder.)




2. From the *Folder Actions* menu, click **Upload File**. The upload screen displays.

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

Secure File Exchange




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:

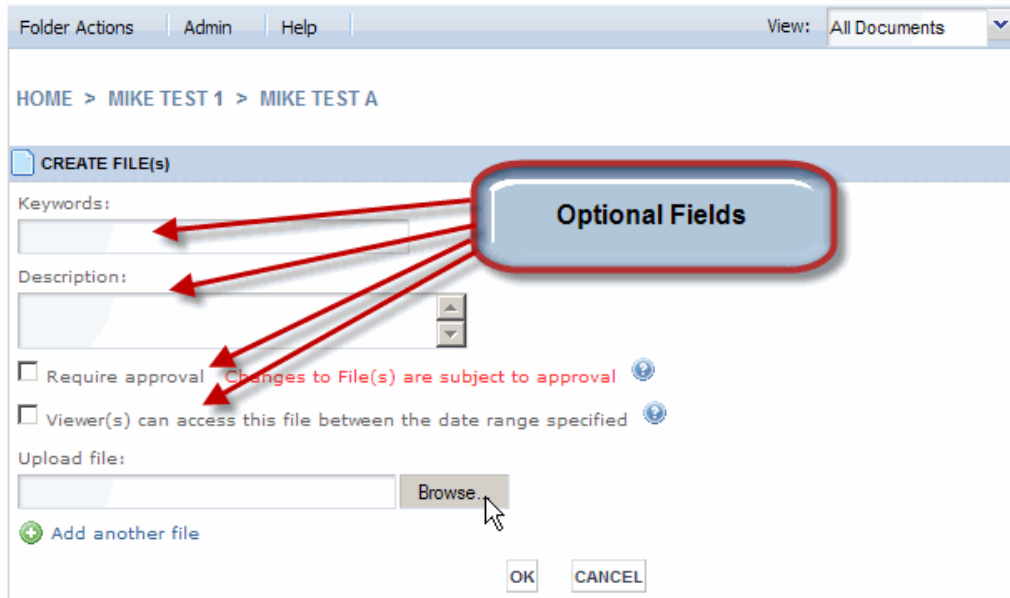
You have successfully uploaded a file. Next, you may wish to allow others access to your files.

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

Additional Options when Uploading a File



 Depending upon your role, you may be able to set additional options when uploading a file, as described below.

Secure File Exchange



The screenshot shows the 'CREATE FILE(S)' dialog box in the Secure File Exchange interface. The dialog has a title bar with 'Folder Actions', 'Admin', and 'Help' buttons, and a 'View: All Documents' dropdown. The breadcrumb path is 'HOME > MIKE TEST 1 > MIKE TEST A'. The 'CREATE FILE(S)' section includes a 'Keywords:' text box, a 'Description:' text box with a vertical scrollbar, and two checkboxes: 'Require approval' (with a red note 'Changes to File(s) are subject to approval') and 'Viewer(s) can access this file between the date range specified'. Below these is an 'Upload file:' section with a text box and a 'Browse...' button. At the bottom, there is an 'Add another file' link, 'OK', and 'CANCEL' buttons. A red callout box labeled 'Optional Fields' points to the 'Keywords', 'Description', and 'Require approval' fields.

Complete the following *optional* fields, as required:

1. Enter comma-separated keywords and phrases in the *Keyword* field. The keywords are associated with the file, and are used to locate the file during searches.
2. Type a *description* of the item.
3. Require approval on any updates made to this item by selecting the **Require approval** check box. [Learn more >>>](#)
4. Set effective dates for the item by enabling the *Viewer(s) can access this file between the date range specified* check box.
 - a. Click  to select the viewing availability Start Date.
 - b. Click  to select the viewing availability End Date.



When an access date range is specified, users with only the 'Viewer' role can access the file during the specified date range. Once the End Date has passed, users with only the Viewer role can no longer access the item.

Access for Contributors and Collaborators is not affected by the date range.

5. Click **OK**.

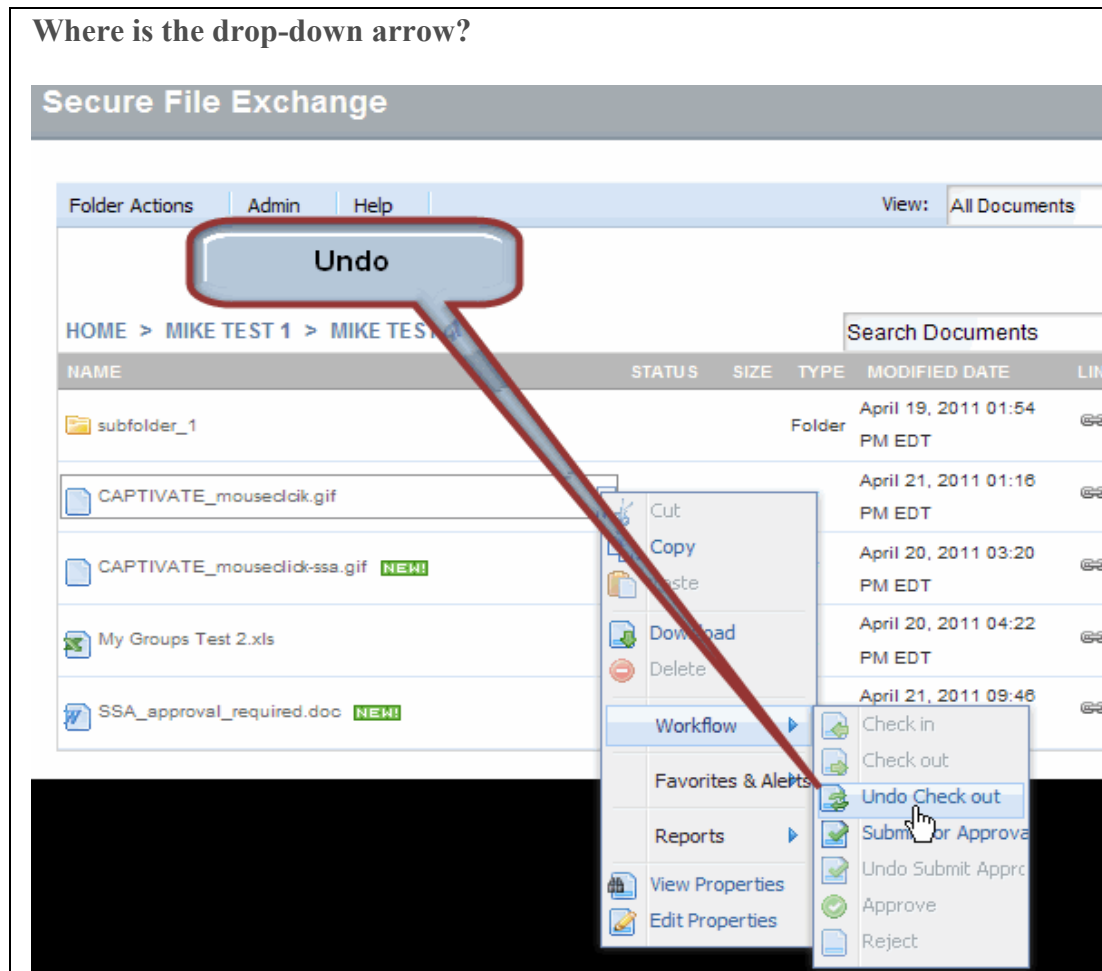
- If approval is **not** required, the file will be accessible immediately.
- If approval is required, your file is uploaded as a draft. Your file is not available to SFX users until it is approved. Proceed to the section entitled Submitting a Draft for Approval.

RESULT:

You have successfully set options for a file.



Canceling a Checkout

1. Navigate to the checked out file.
2. Click the drop-down arrow at the far right of the file name.



3. From the Workflow option, click **Undo Check out**. The screen refreshes and the file is no longer checked out.

The screenshot displays the 'Secure File Exchange' web interface. At the top, there is a navigation bar with 'Folder Actions', 'Admin', and 'Help' links, and a 'View: All Documents' dropdown. A yellow notification banner reads: **"My Groups Test 2.xls" UNDO CHECK OUT complete!**. Below this, the breadcrumb path is 'HOME > MIKE TEST 1 > MIKE TEST A', and a 'Search Documents' input field is visible. The main content area features a table with the following columns: NAME, STATUS, SIZE, TYPE, and MODIFIED DATE. Two files are listed:

NAME	STATUS	SIZE	TYPE	MODIFIED DATE
 CAPTIVATE_mousedcik.gif NEW!		43KB	.gif	April 13, 2011 01:23 PM EDT
 My Groups Test 2.xls NEW!		18KB	.xls	April 18, 2011 09:37 AM EDT

RESULT:

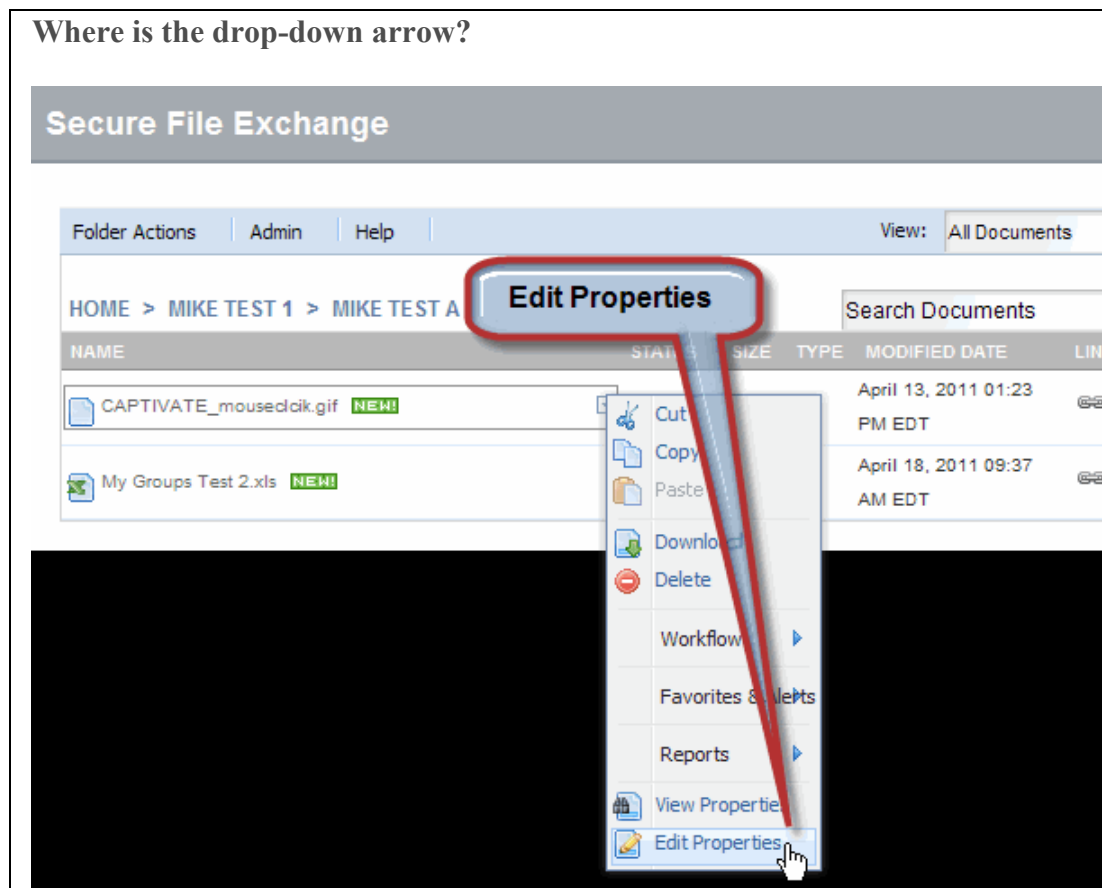
You have successfully cancelled a file checkout.


Changing File or Folder Ownership

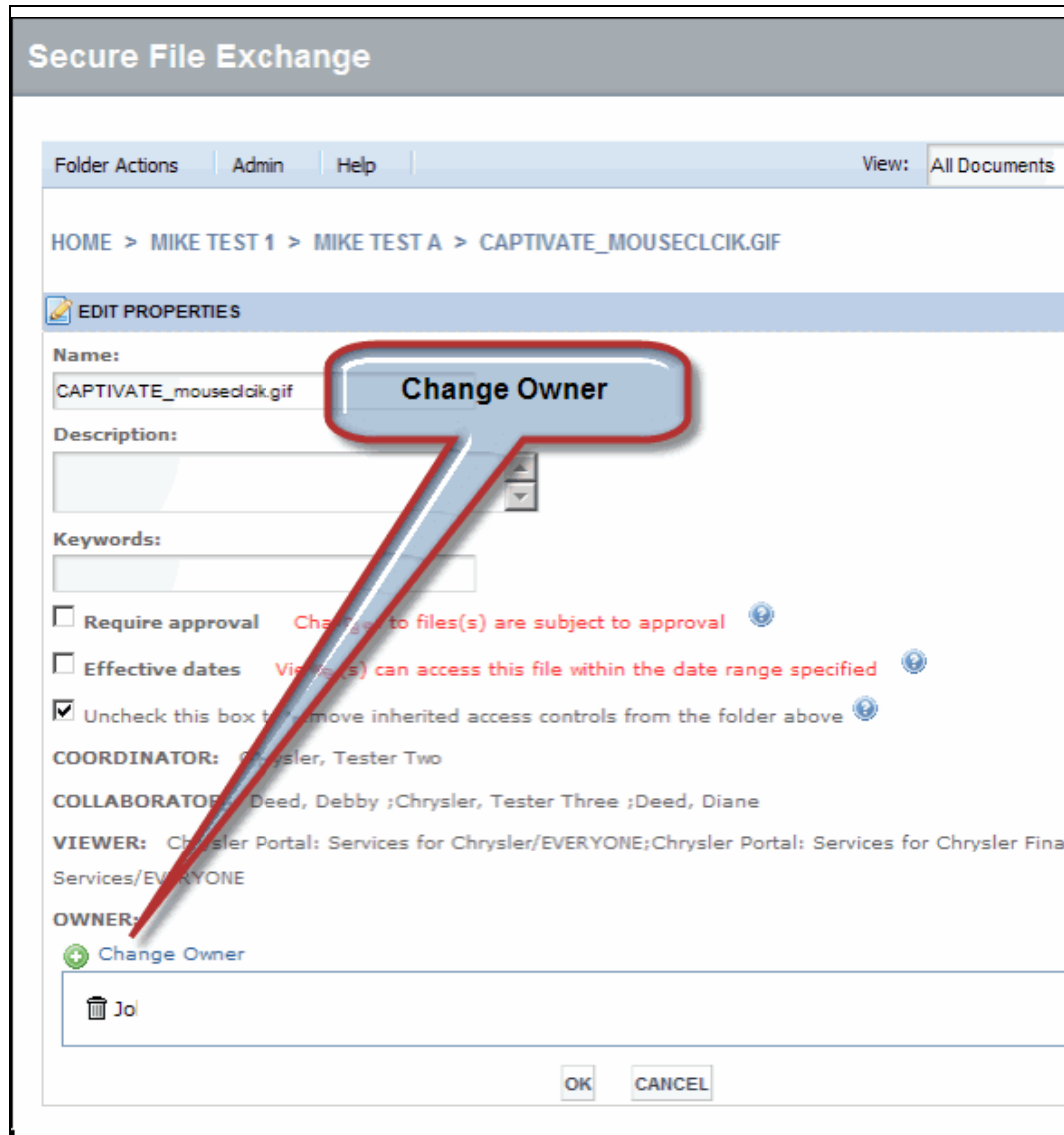
 This task can be performed only by an SFX Administrator.

A file or folder can have only one owner.

1. Navigate to the file or folder whose owner you want to change.
2. Click the drop-down arrow at the far right of the file/folder name.



3. Click **Edit Properties**. A list of file/folder properties is displayed.
4. Click  next to Change Owner. The User Directory window displays.



- a. Type the name (or partial name) of the user you want to assign as the item owner 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 user you want to designate as the item owner. An item can have only one owner. The user's name displays in the Selected People box.
 - e. Click **OK**. The User Directory window closes and the owner selection displays in the Edit Properties window.
5. Click **OK**. The previous owner is removed from the item's ownership and the new owner is assigned.

RESULT:

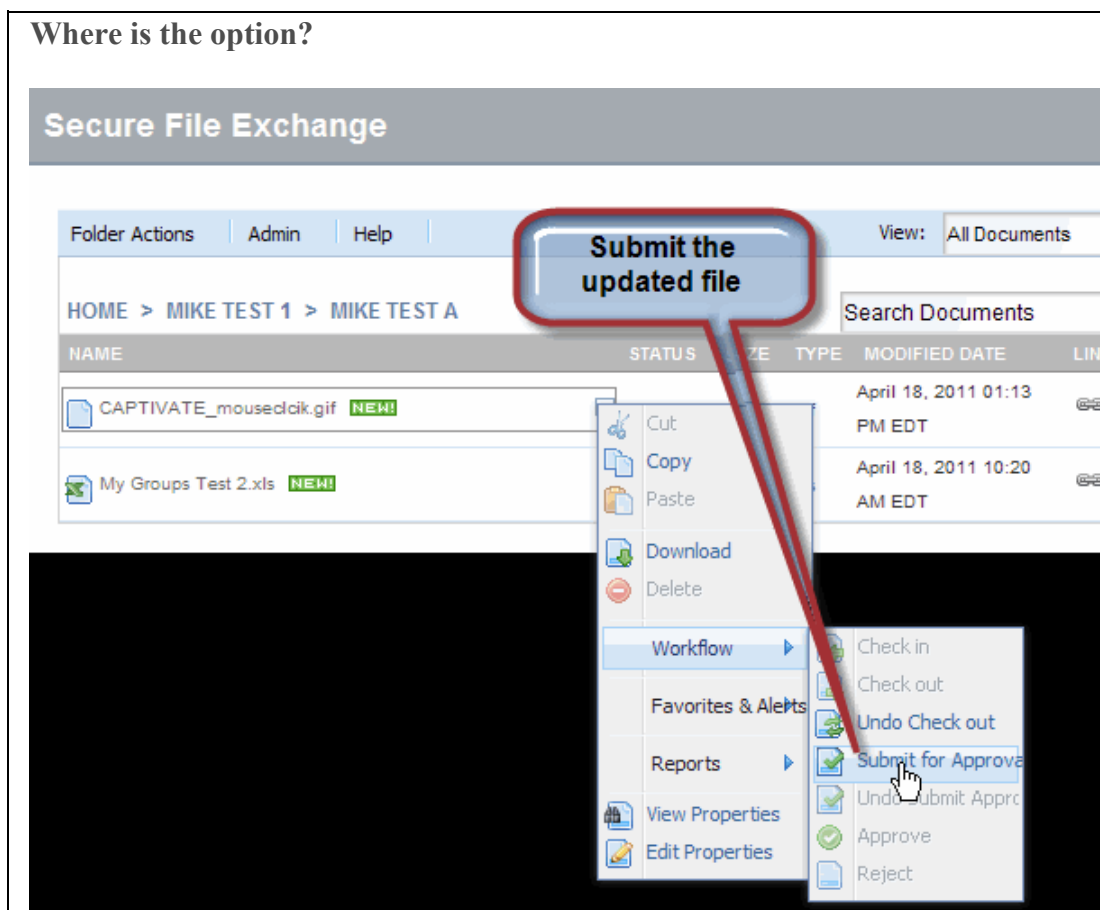
You have successfully changed ownership of a file or folder.

Checking In a File (approval required)

i When approval is required, you do not use Check Out/Check In to control file access. Instead, you upload a modified version of a file to put it in Draft status, then you submit the draft for approval to begin the process of making the new version available to users.

If you Check Out a file that requires approval workflow, you will not be allowed to upload a new version of the file until you cancel the Check Out.

1. Navigate to the file that has been downloaded, modified, and updated on SFX. The file is in Draft status.
2. Click the drop-down arrow at the far right of the file name.



3. From the workflow option, click **Submit for Approval**. The screen refreshes and the file status is set to Pending.

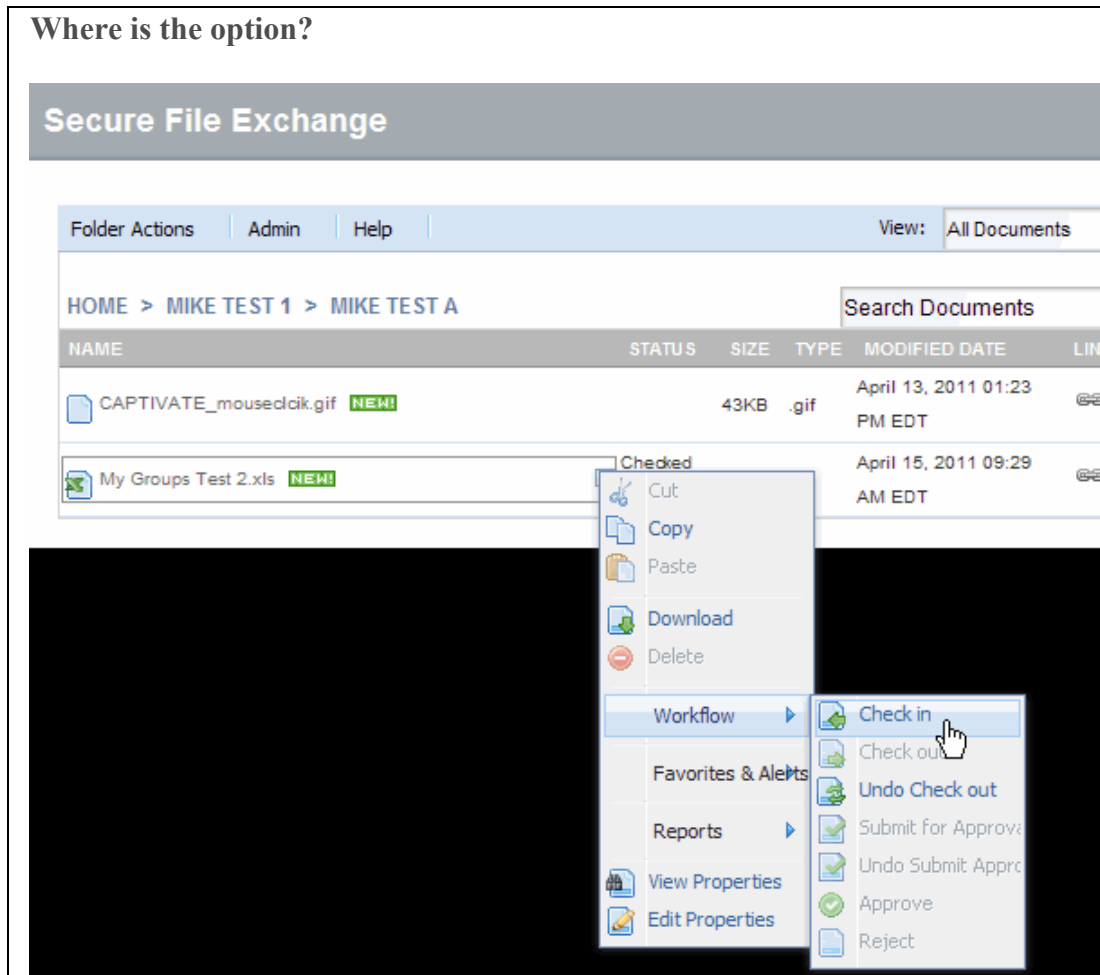
4. The file must be approved before it will be available to other users.

RESULT:

You have successfully checked in a file.

Checking In a File (approval not required)

1. Navigate to the checked out file that has been updated.
2. Click the drop-down arrow at the far right of the file name.



3. From the Workflow option, click **Check in**. The screen refreshes and the file is unlocked.

RESULT:

You have successfully checked in a file.

Checking Out a File



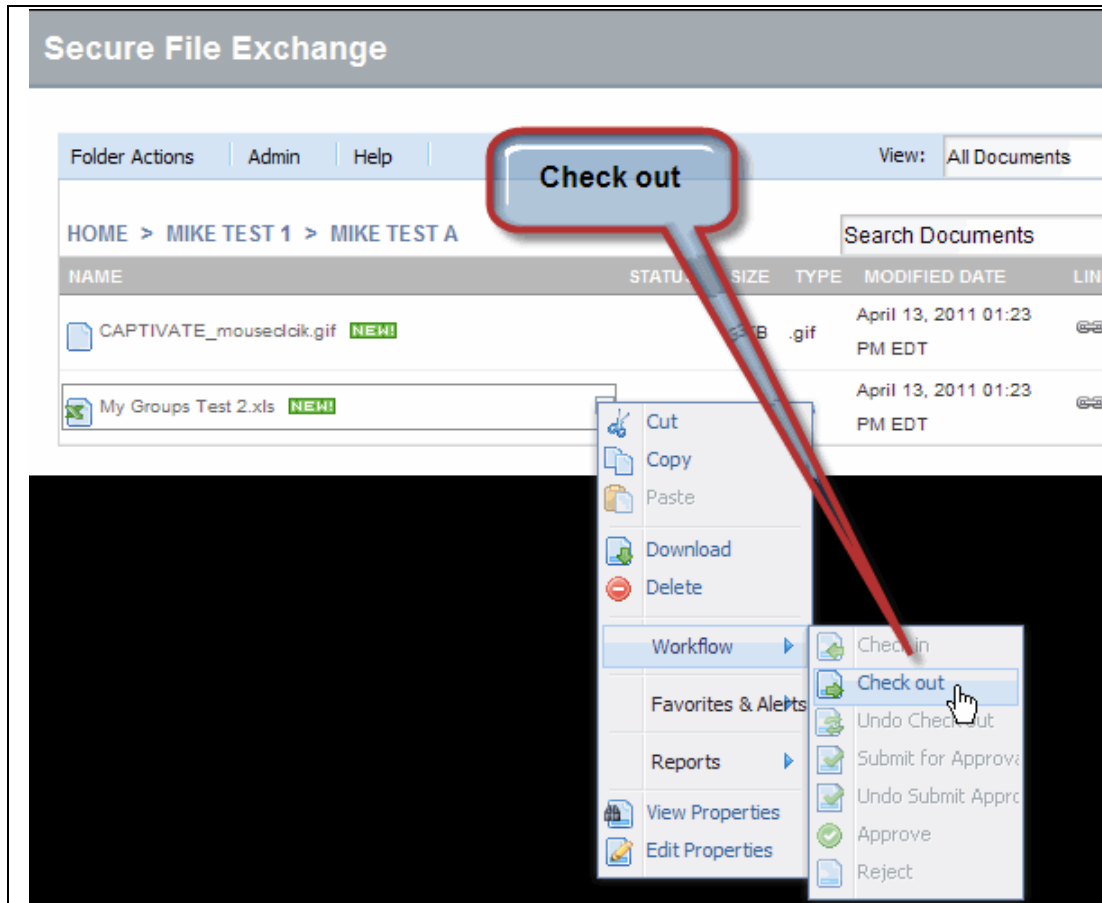
Checking out a file 'locks' the file so that other users cannot upload new versions of the file. Users can view and download a checked out file.

Note: If Approval is required, you cannot upload a new version of a checked out file. In that case, you must:

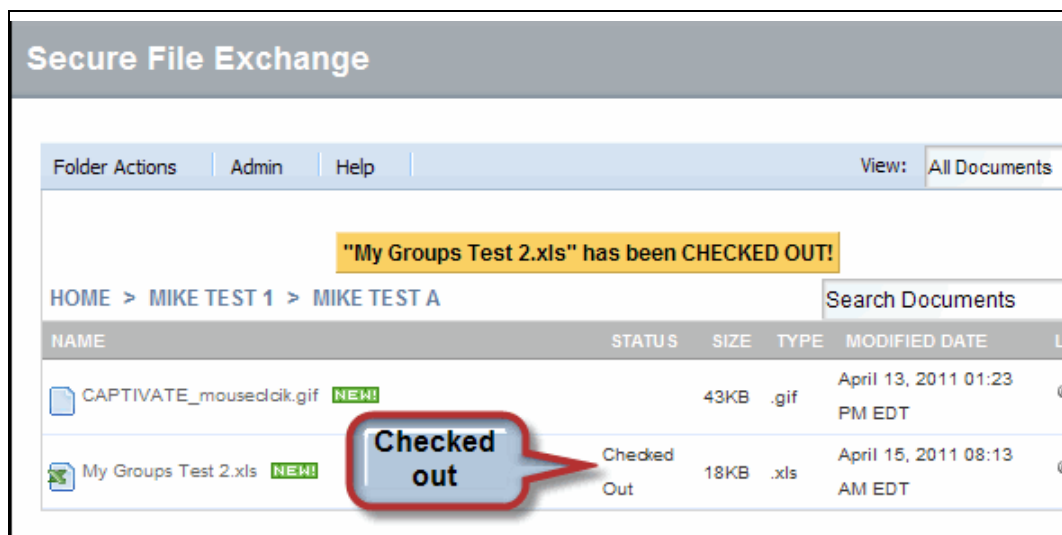
- undo the check out
 - upload the new version of the file.
-

1. Navigate to the file you want to check out.
2. Click the drop-down arrow at the far right of the file name.

Where is the drop-down arrow?



3. From the Workflow option, click **Check out**. The screen refreshes and the file is checked out.

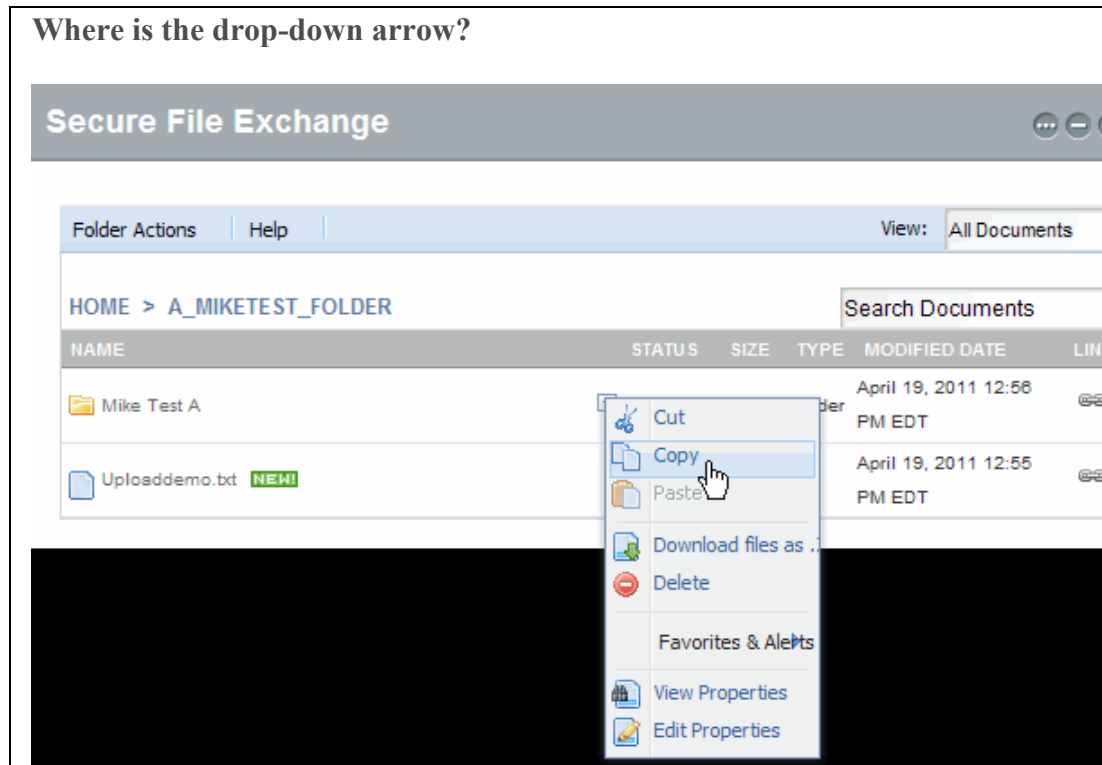


RESULT:

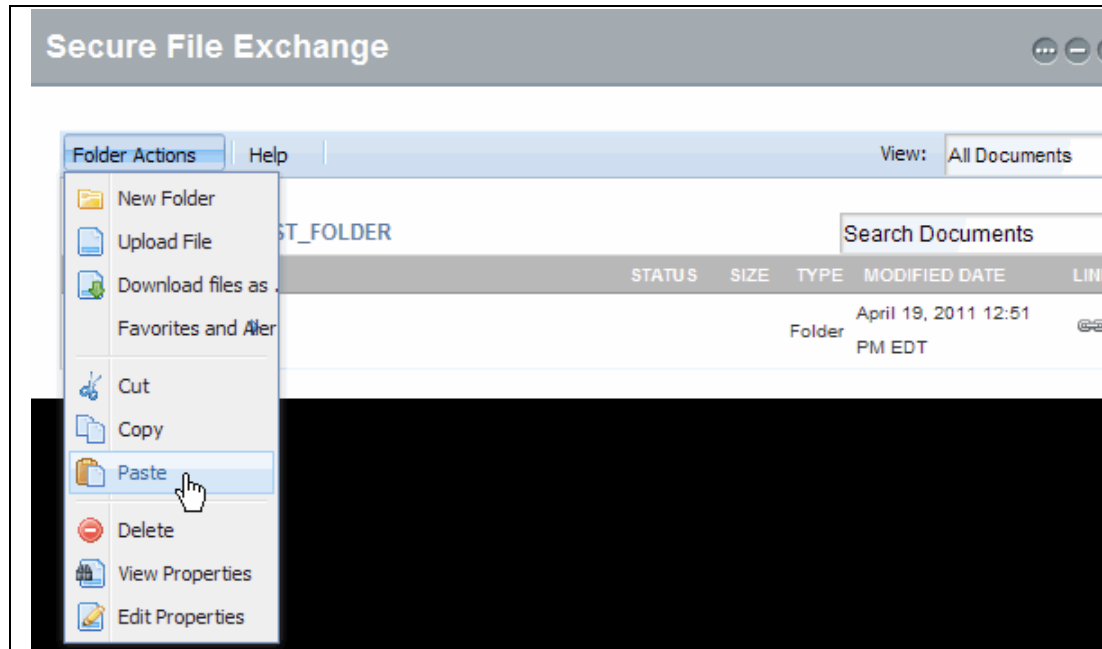
You have successfully checked out a file. After modifying the file, perform the steps to store the updated file in SFX, and then perform the file check in task.


Copying a File or Folder to a New Location

1. Navigate to the file or folder you want to copy.
2. Click the drop-down arrow at the far right of the file or folder name.



3. Click **Copy**. The file or folder (with its files and subfolders) is copied to the clipboard.
4. Navigate to the target location.
5. From the Folder Actions menu, click **Paste**.




 Copying files or folders creates duplicate items. Changes to a file or folder in one location do not apply to copies in other locations.

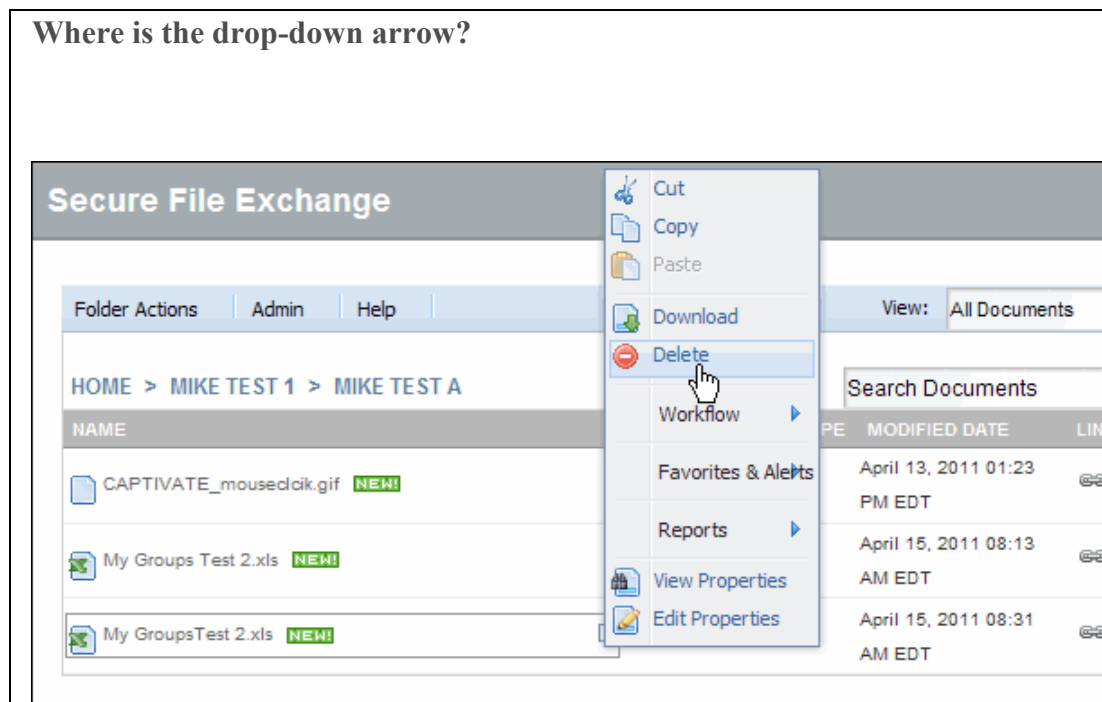
RESULT:

You have successfully copied a file/folder to a new location.

Deleting a File

 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.



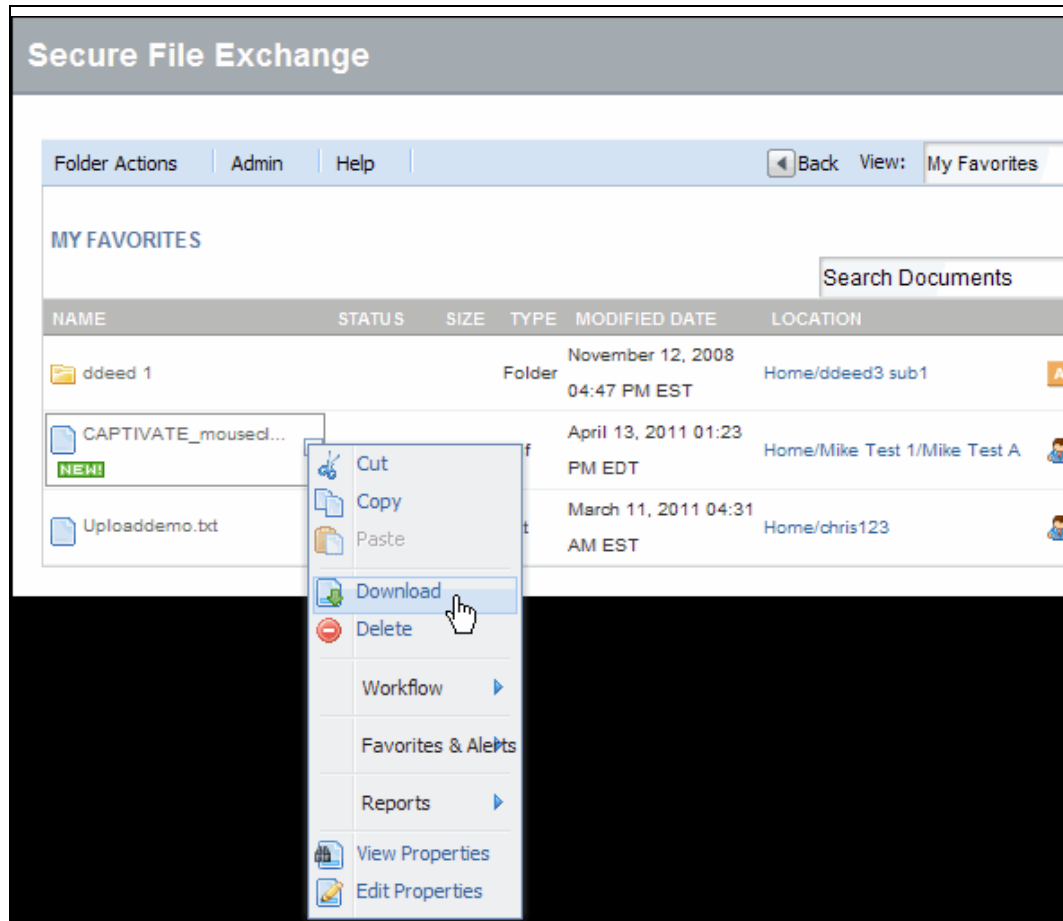
3. Click **Delete**.
4. Click **Yes** to confirm deletion.

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.



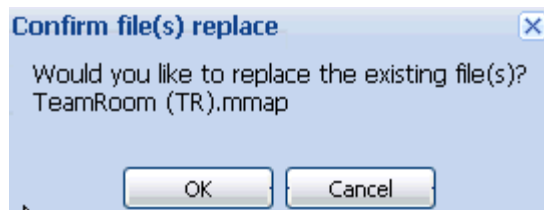
3. Click **Download**.
4. In your PC's File Download dialog, click **Save**.
5. Navigate to the location to which the file should be downloaded.
6. Click **Save**.

RESULT:

You have successfully downloaded a document.

stored on SFX.

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.

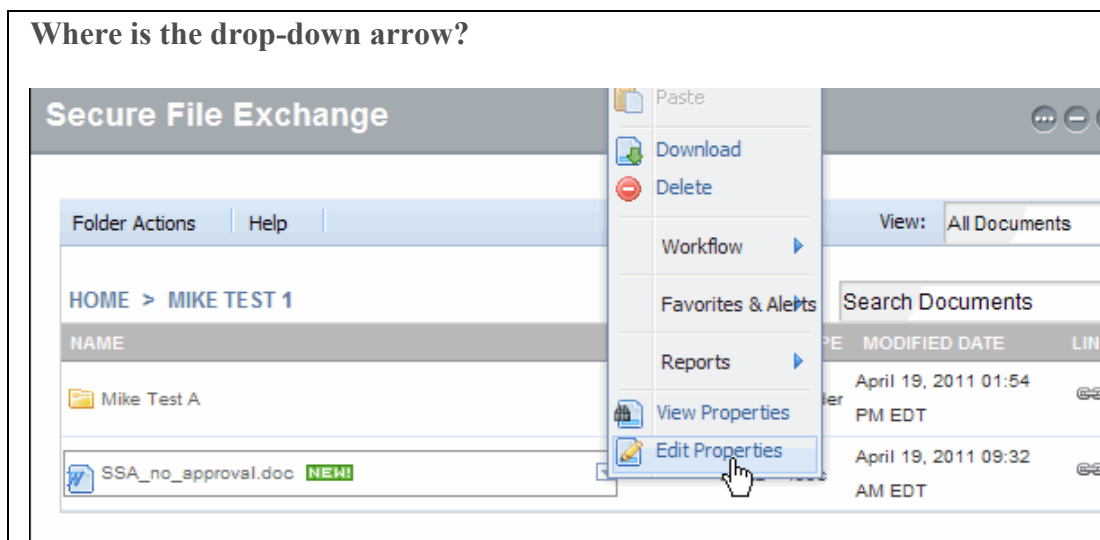
RESULT:

You have successfully updated a file.

Editing File or Folder Properties

 You must be the item owner or have the required permissions to perform this task.

1. Navigate to the file or folder whose properties you want to edit.
2. Click the drop-down arrow at the far right of the file/folder name.



3. Click **Edit Properties**. The Edit Properties window displays.
4. Edit the properties as desired.
 - a. Edit approval requirements as desired. (Refer to the section entitled Removing Approval Requirements from a File or Folder or Requiring Approval on a File for further details)
 - b. Some users can change the file owner. See Changing File / Folder Owners for details.
 - c. Optionally, modify access permissions to the file or folder by following the steps in the section entitled Modifying Access Rights.
5. Click **OK**.

RESULT:

You have successfully edited the properties of a file or folder.

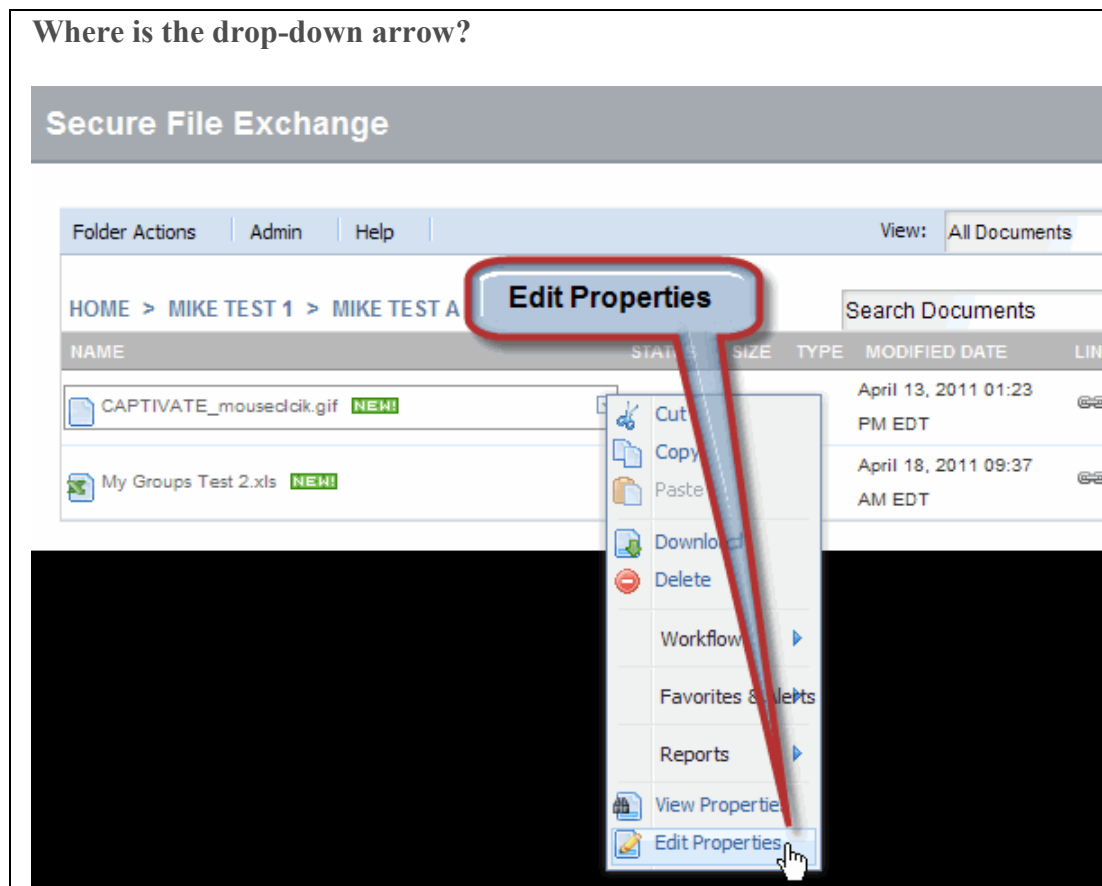
Modifying Access Rights to a File or Folder

 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.



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

Secure File Exchange

Folder Actions | Help | View: All Documents

HOME > MIKE TEST 1 > TEST2-INHERITANCE

EDIT PROPERTIES

Name:

Description:

Upload Custom Icon:
 Select an icon:

Require approval Changes to file(s) are subject to approval

Uncheck this box to remove inherited access controls from the folder above

FOLDER ADMIN:

COORDINATOR: Chrysler, Tester Two

COLLABORATOR: Deed, Debby ;Deed, Diane ;Chrysler, Tester Three

CONTRIBUTOR: View, Victor ;02, ssatraining ;Seashell, Sally ;Chrysler, Tester Four

VIEWER: Chrysler Portal: Services for Chrysler/EVERYONE;Chrysler Portal: Services for Chrysler Financial Services/EVERYONE


OWNER: ssatraining 02

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:

Description:

Tahoma B I U A A ab [List Icons]


Upload Custom Icon:
Select an icon:


Require approval Changes to file(s) are subject to approval 

Check this box to inherit access controls from the folder above 


FOLDER ADMIN:



COORDINATOR:

 [Add Members](#)


 Tester Two




COLLABORATOR:

 [Add Members](#)


 Deed, Debby ,  Deed, Diane

CONTRIBUTOR:



 [Add Members](#)

 View, Victor ,  02, ssatraining ,  Seashell, Sally

VIEWER:

 [Add Members](#)

OWNER: ssatraining 02

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**.

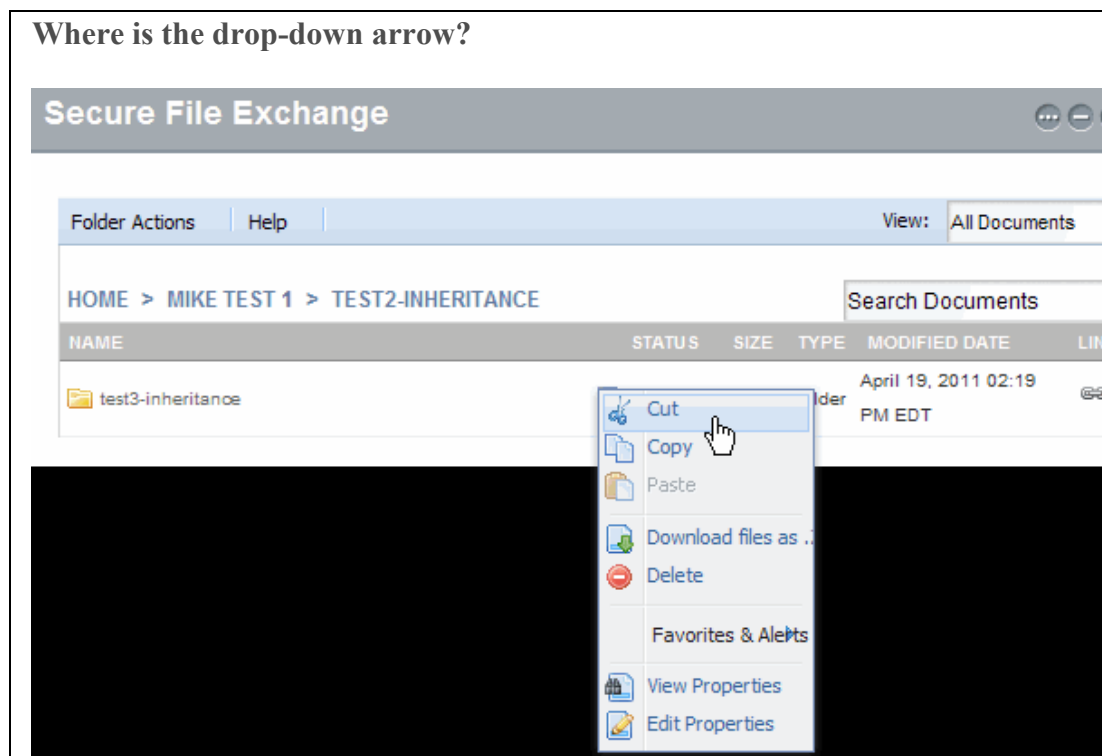
RESULT:

You have successfully modified access rights on an item.

Moving a File or Folder with Cut

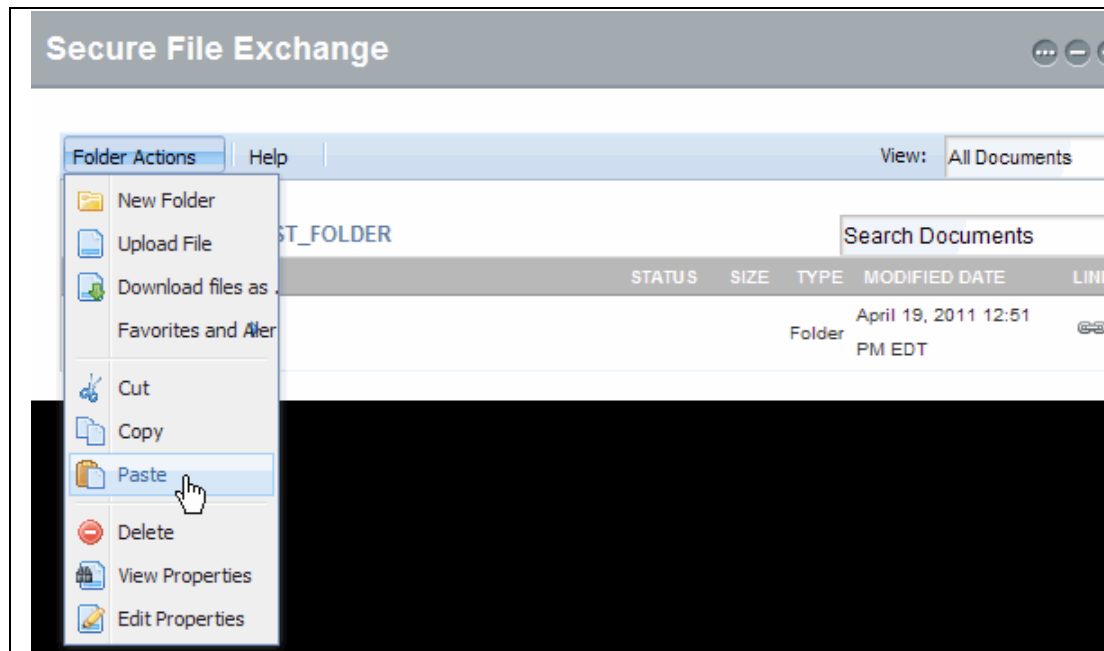
 You must be the file or folder owner or have an appropriate role to move a file or folder using Cut.

1. Navigate to the file or folder you wish to move.
2. Click the drop-down arrow at the far right of the file name.



3. Click **Cut**.
4. Navigate to the location to which you want to move the file or folder..
5. From the Folder Actions menu, click **Paste**.





RESULT:

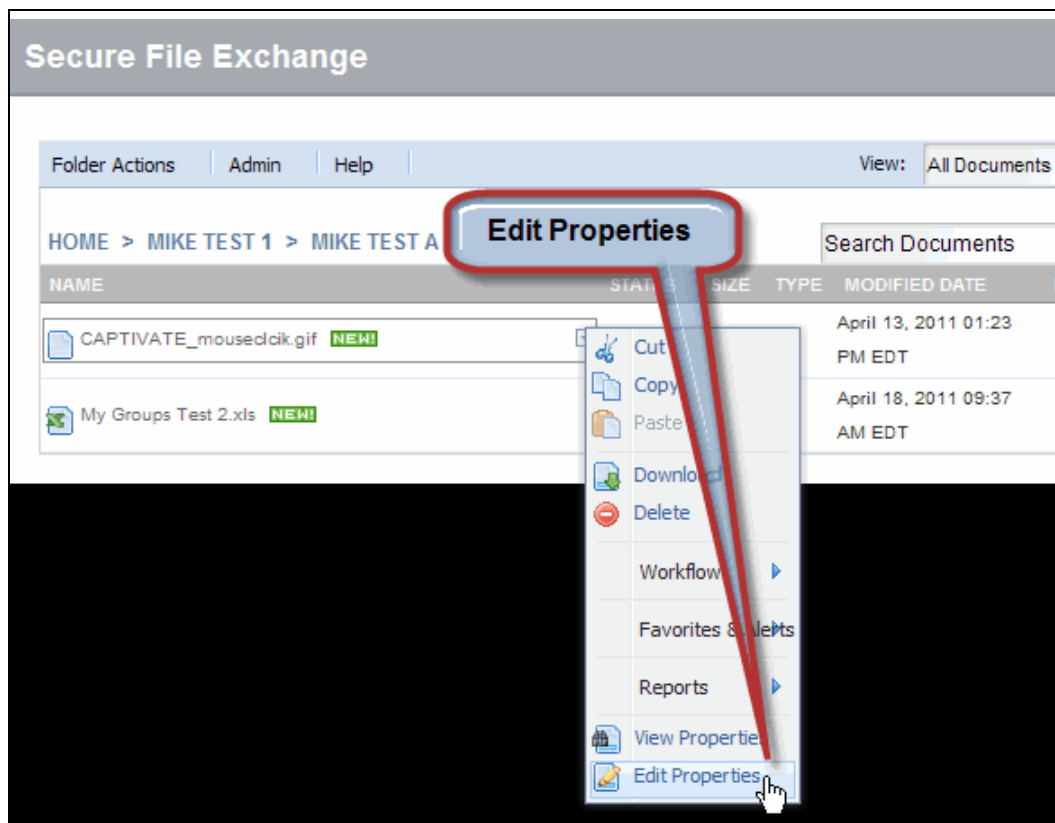
You have successfully cut and pasted a file or folder.

Requiring File Approval

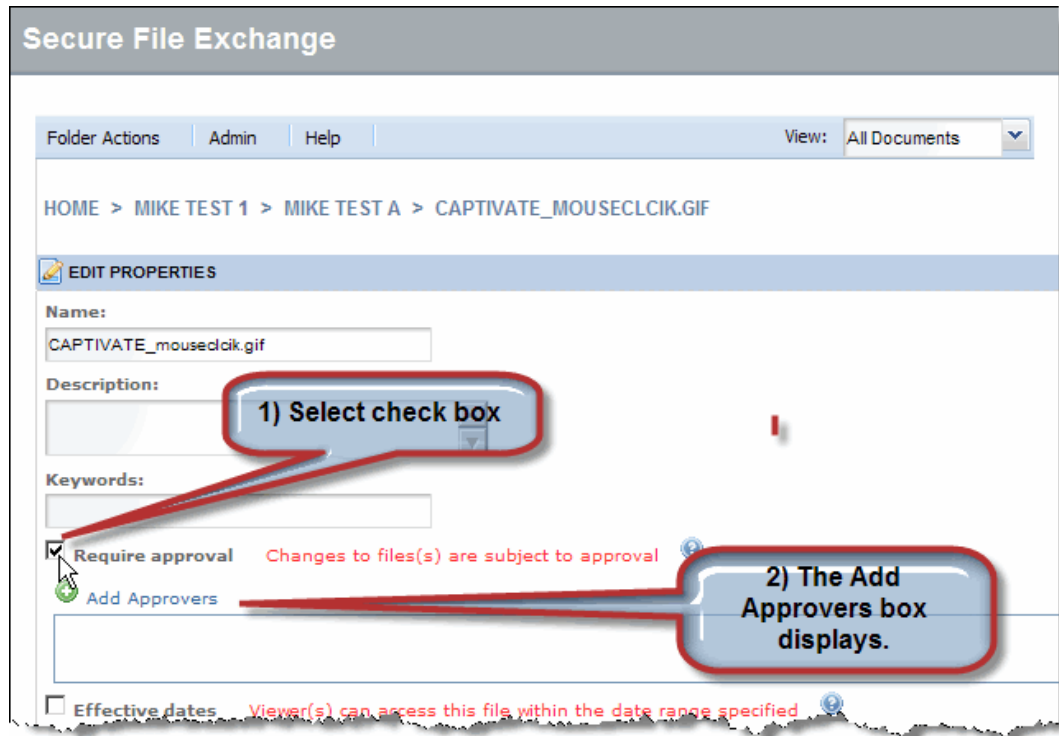
If your SFX Administrator configures all items in the repository to require approval, approvers are established at the repository level for all folders and files within the repository. You cannot turn off approval workflow for your items, and you cannot select your own approvers.


If approval is not required at the top repository level, and is not required at the folder level by the folder owner or an administrator, you can require approval of files for which you are the owner. Complete the following steps to require approval on a file.


1. Navigate to the file for which you wish to require approval.
2. From the file drop down menu, click **Edit Properties**. The Edit Properties window displays.





3. In the Edit Properties window, select the **Require Approval** check box. The Add Approvers option displays.



 If the folder to which a file is uploaded already requires approval workflow, the uploaded file will require approval - it 'inherits' the requirement from the folder. If this is the case, the “Require Approval” check box is grayed out and you cannot change the approval requirement.

4. Click  next to **Add Approvers**. The User Directory window displays.
 - a. Type the name (or partial name) of the users you want to assign as item approvers 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 each user you want to designate as an approver. The users' names display in the Selected People box.
 - e. Click **OK**. The User Directory window closes and the selected approvers display in the Edit Properties window Add Approvers list.
5. Click **OK**. The screen refreshes, and a message confirming the updated properties displays.

The screenshot shows the 'Secure File Exchange' web interface. At the top, there is a navigation bar with 'Folder Actions', 'Admin', and 'Help' menus, and a 'View: All Documents' dropdown. A yellow notification banner reads: **"CAPTIVATE_mousedcik.gif" properties have been UPDATED!**. Below this, the breadcrumb path is 'HOME > MIKE TEST 1 > MIKE TEST A', and there is a 'Search Documents' input field. A table lists the files in the current folder:

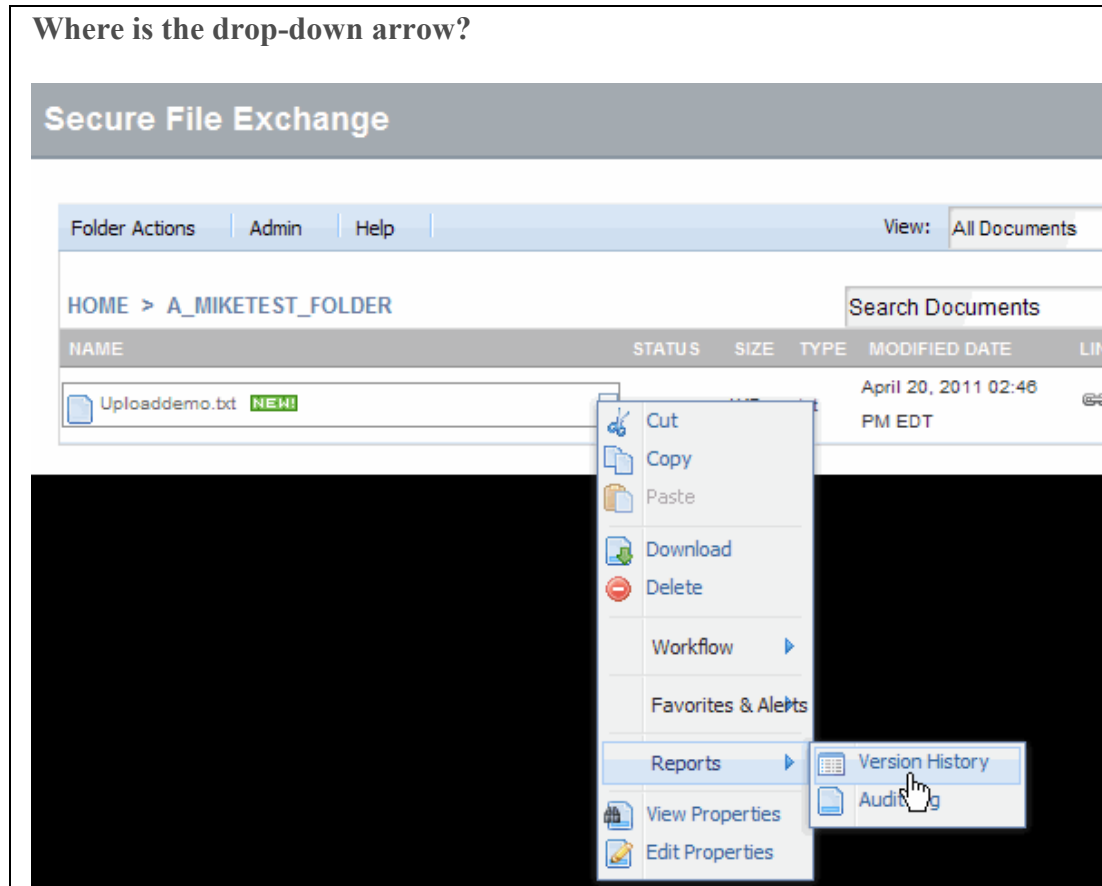
NAME	STATUS	SIZE	TYPE	MODIFIED DATE
 CAPTIVATE_mousedcik.gif NEW!		43KB	.gif	April 18, 2011 01:05 PM EDT
 My Groups Test 2.xls NEW!		18KB	.xls	April 18, 2011 10:20 AM EDT

RESULT:

You have successfully required approval on a file.

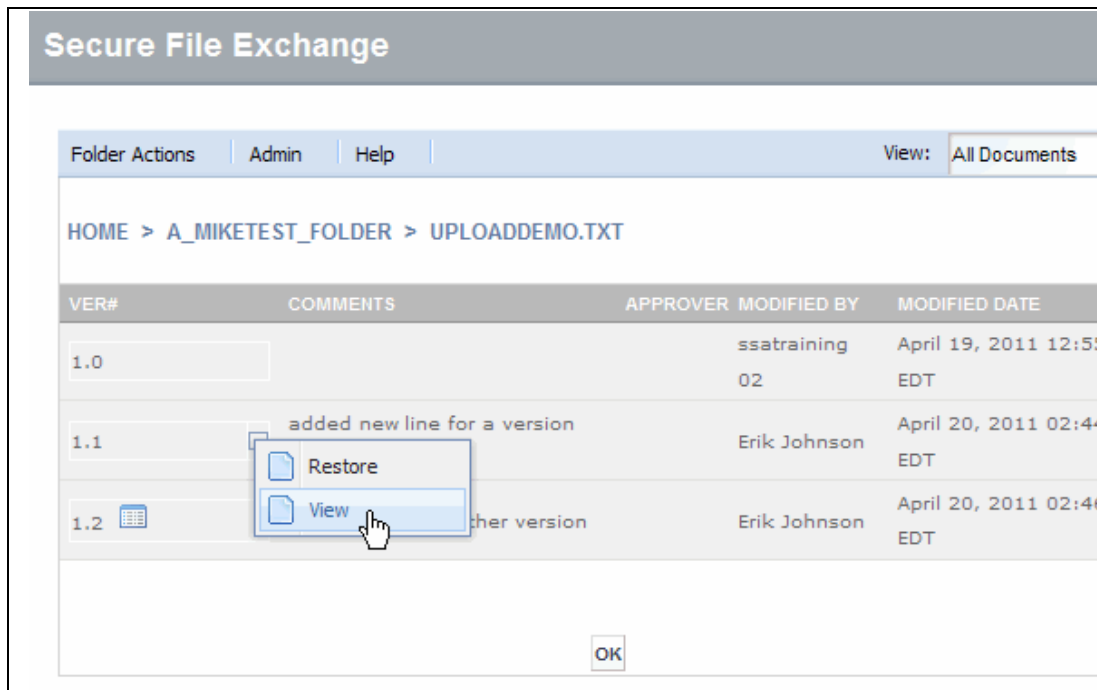
Restoring a Previous Version

1. Navigate to the file you want to return to a previous version..
2. Click the drop-down arrow at the far right of the file name.

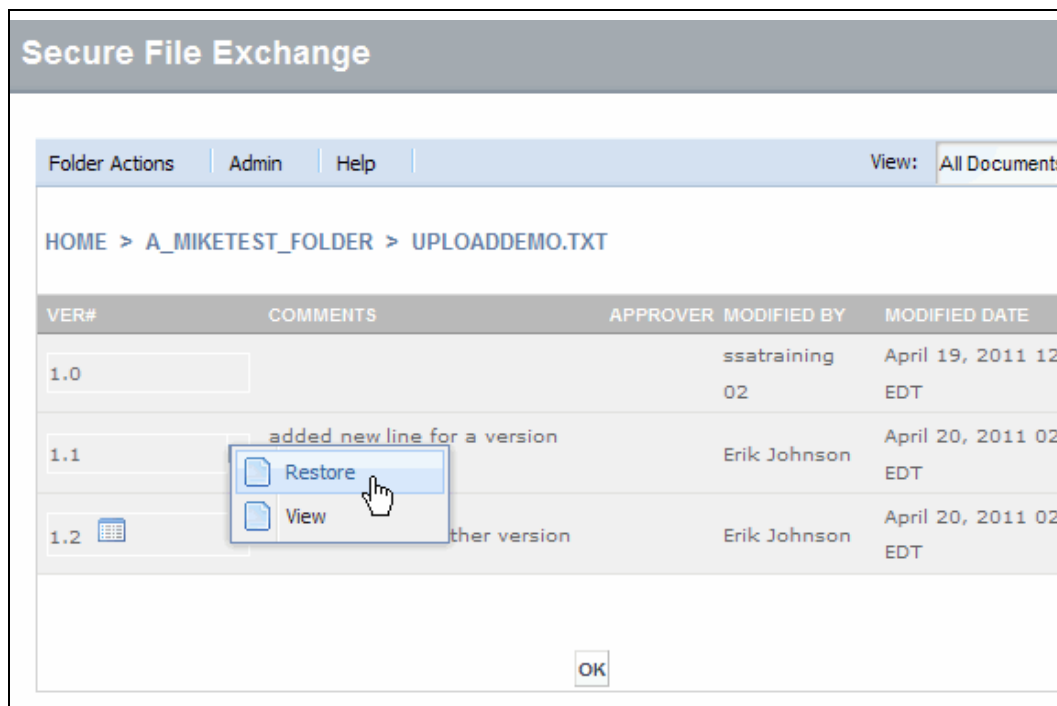


3. Click **Reports -> Version History**. A list of the file versions displays.
4. Click the drop-down arrow at the far right of the version number to which you want to restore the file

Where is the drop-down arrow?



5. Click **View** and follow the prompts to open the file. Verify that the version is the one to which you want to restore the file. If the file contents are not what you want, repeat steps 4 and 5 until you find the correct version.
6. Click the drop-down arrow at the far right of the version number to which you want to restore the file.



7. Click **Restore**. The file is restored to the selected version.
 - a. If approval is not required, the file is restored in the *Checked Out* state. Perform the steps for Checking In a File to publish the restored version.
 - b. If approval is required, the file is restored in the *Draft* state. Perform the steps for Submitting a Draft for Approval. When the file is approved, it will become available to SFX users.




When you check in the file, the restore becomes a new version. For example, if a file has versions 1.0, 1.2, and 1.3, and you restore the file to version 1.2, the 1.2 contents restore will be tracked as version 1.4.

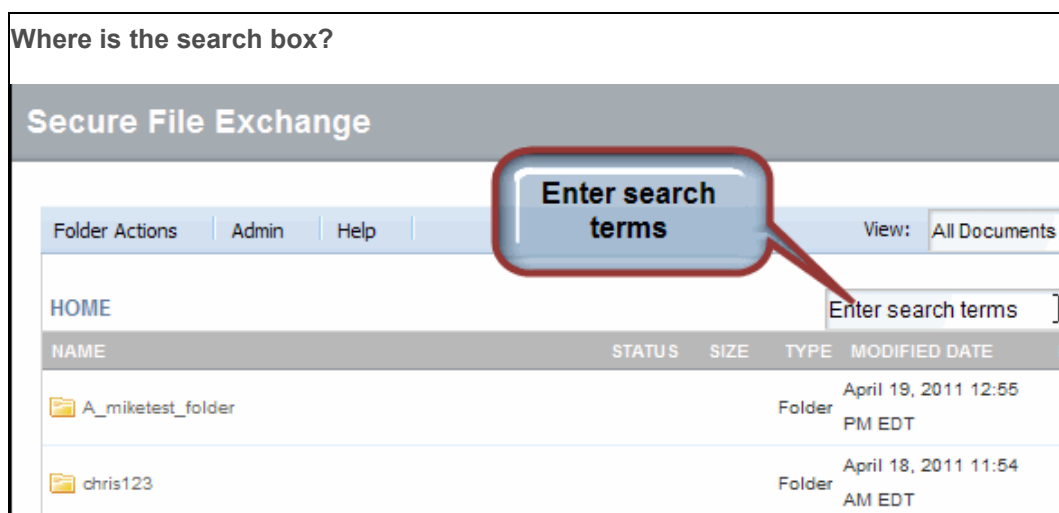
RESULT:

You have successfully restored a previous version.

Searching for a File

 No matter where you are within the SFX repository when you conduct a search, the search is performed on the entire repository. Searches are not limited to files and subfolders in your current location.

1. Type search criteria in the search box. Search criteria can include: words in the file title, keywords, document type (such as doc or PDF), etc.



2. Click the magnifying glass icon to start the search. The search results display.

Secure File Exchange

Folder Actions | Admin | Help | Back | View: All Documents

Searched for upload Found 7 results:

SEARCH RESULTS

NAME	STATUS	SIZE	TYPE	MODIFIED DATE	LOCATION
Uploaddemo.txt		1KB	.txt	September 26, 2010 09:25 PM EDT	Home/Sidzhou/00
Uploaddemo.txt		1KB	.txt	March 11, 2011 04:31 AM EST	Home/chris123
Uploaddemo.txt NEW!		1KB	.txt	April 20, 2011 03:12 PM EDT	Home/A_miketest



Search results are for **approved items only**. If a document is pending approval, it is not rendered in the search results.

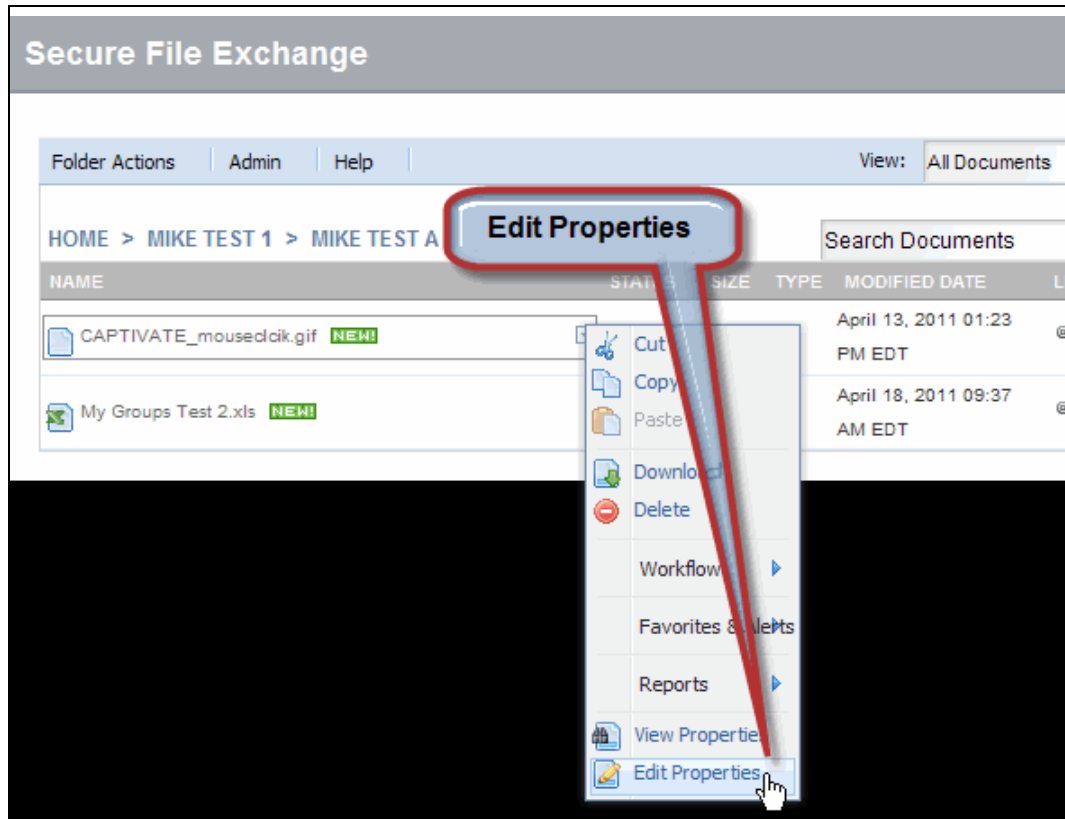
3. From the search results, you can:
 - a. View or download a file by clicking its link in the Name column.
 - b. Navigate to a file by clicking its hyperlink in the Locations column.



RESULT:

You have successfully searched for a document.

Setting Effective Dates

1. Navigate to the file or folder for which you wish to set dates.
2. Click the drop-down arrow at the far right of the file.



3. Click **Edit Properties**.
4. Select the **Effective Dates** check box, and use the calendar icons to set the start and end date that this file will be available to viewers. Once the end date is reached, the file will no longer be available to users with only the Viewer role, but will remain available to all other user types.
 - a. Click  to select the viewing availability Start Date.
 - b. Click  to select the viewing availability End Date.
5. Click **OK**.

 Effective dates specify the date range for which a file is available to users with only the Viewer role.

The effective dates can be changed or turned off by the file or folder owner.

The dates do not limit file access by users with other roles.

RESULT:

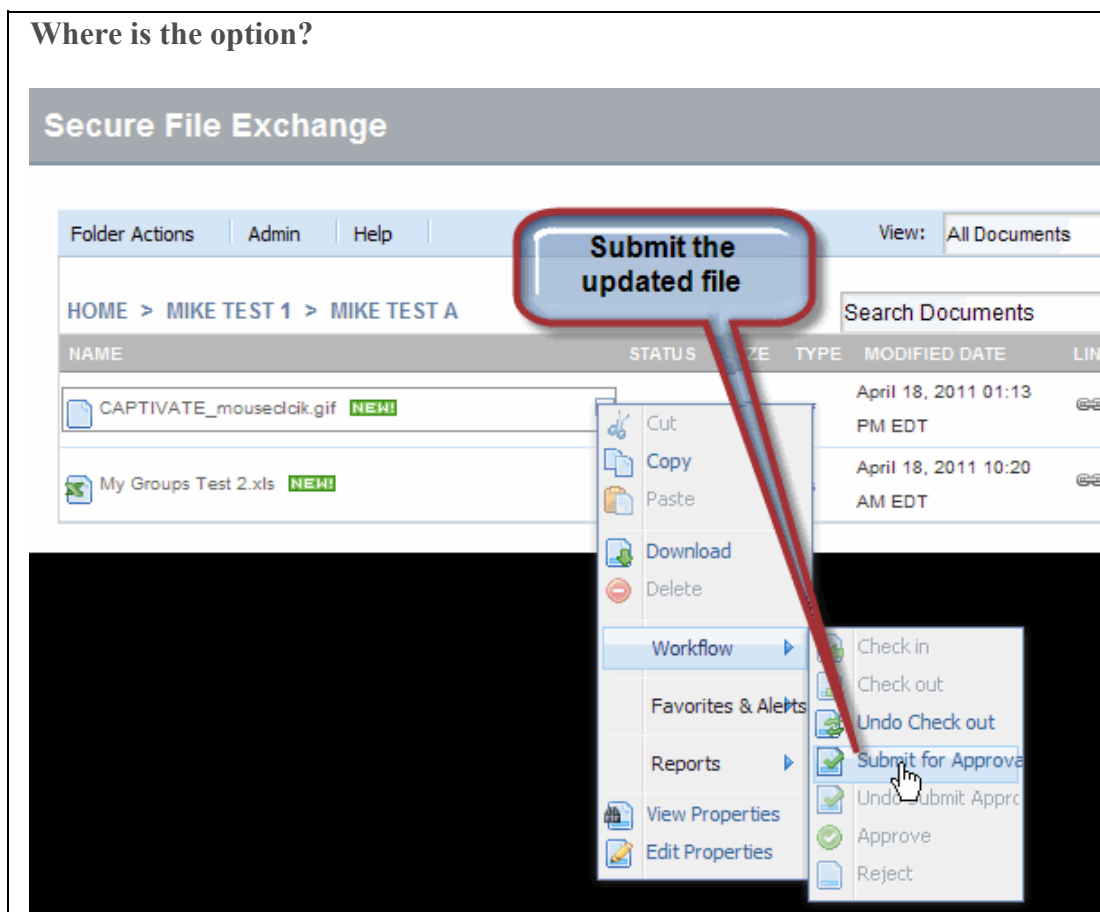
You have successfully set effective dates.

Submitting a Draft for Approval

 This procedure applies only to files that require approval workflow.

You cannot submit a file for approval unless it is in **Draft** status. Perform a File Update in order to put a file in **Draft** status.

1. Navigate to the **draft** file you want to submit.
2. Click the drop-down arrow at the far right of the file name.



3. From the workflow option, click **Submit for approval**. The Submit for Approval window displays.

The screenshot shows the 'Secure File Exchange' web interface. At the top, there is a navigation bar with 'Folder Actions', 'Admin', and 'Help' menus, and a 'View: All Documents' dropdown. Below this is a breadcrumb trail: 'HOME > MIKE TEST 1 > MIKE TEST A > CAPTIVATE_MOUSECLCIK.GIF'. A blue banner with a checkmark icon and the text 'SUBMIT FOR APPROVAL:' is displayed. Below the banner is a table with columns: 'USER', 'COMMENTS', 'STATE', and 'DATE'. The 'COMMENTS' column contains a text input field with the placeholder text 'Please enter comments:'. The input field contains the text 'Please review and approve the new callout'. Below the input field are 'OK' and 'CANCEL' buttons.

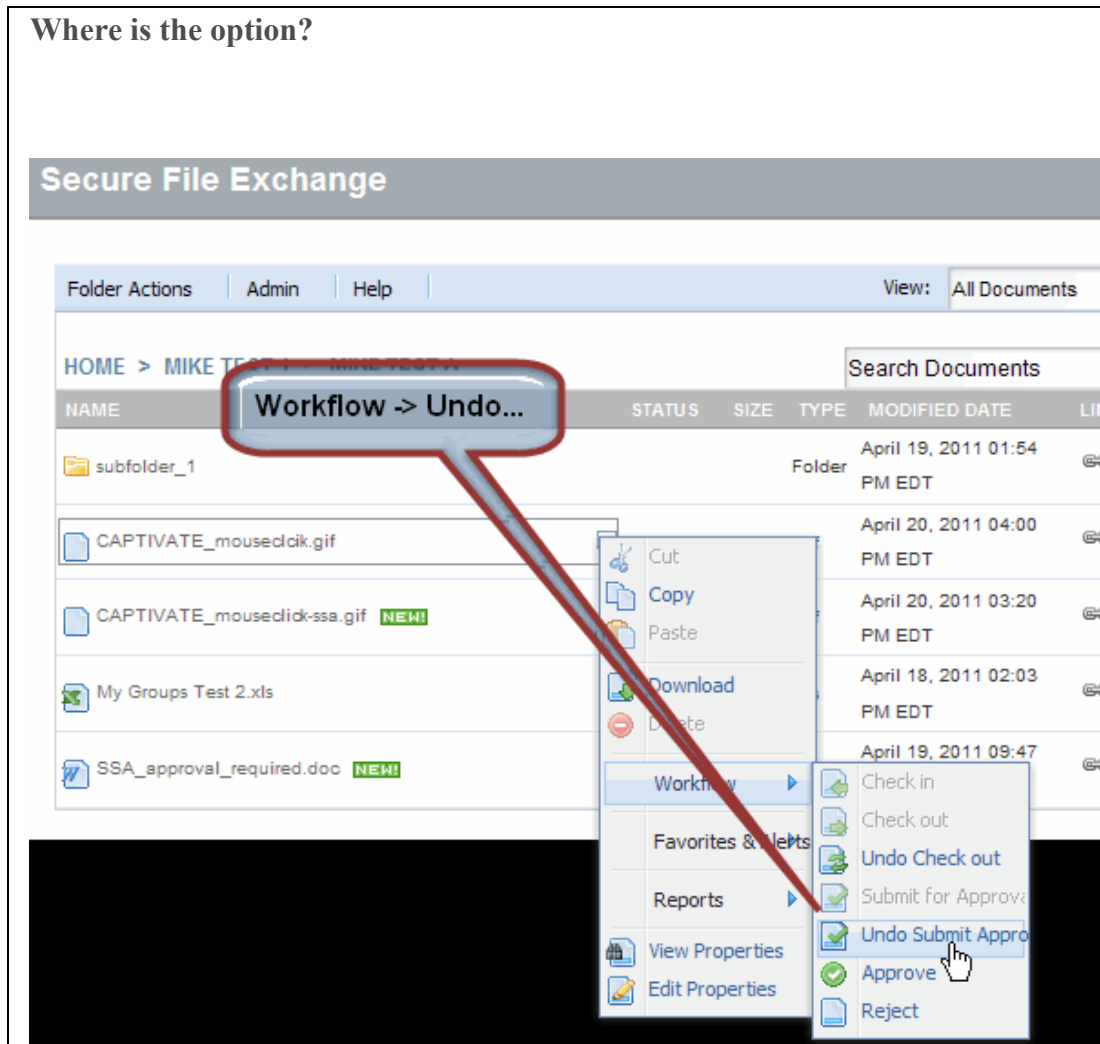
4. Enter comments for the approver.
5. Click **OK**. The file's status is changed to the Pending state. You will receive email notification of the approval decision.

RESULT:

You have successfully submitted a draft for approval.

Canceling an Approval Request for a Draft

1. Navigate to the Pending file whose submission for approval you want to cancel.
2. Click the drop-down arrow at the far right of the file name.



3. From the workflow option, click **Undo submit for approval**.
4. The file is returned to the Draft state.

RESULT:

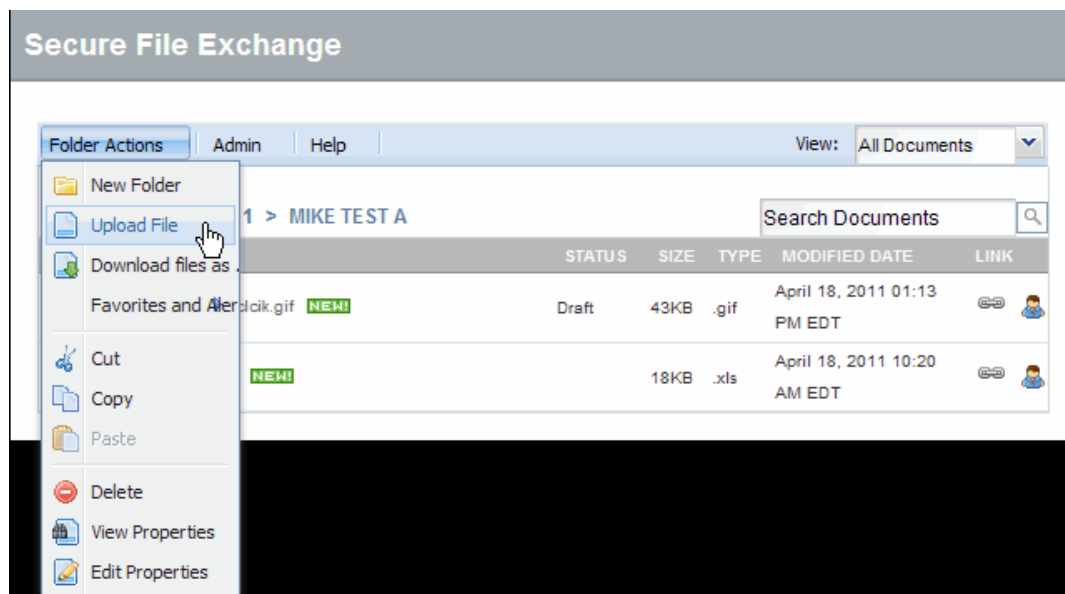
You have successfully cancelled an approval request for draft.

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.

1. Navigate to the **folder** that contains the file you want to update.



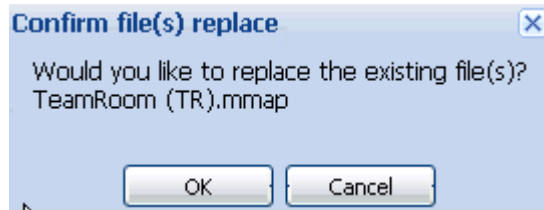
2. From the *Folder Actions* menu, click **Upload File**.
3. Click **Browse**. View file name restrictions >>>

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

/ & : % + ? ; *

We recommend you do not include spaces in the names of files stored on SFX.

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.

WORKING WITH FOLDERS

Assigning a Fax Number to a New Folder

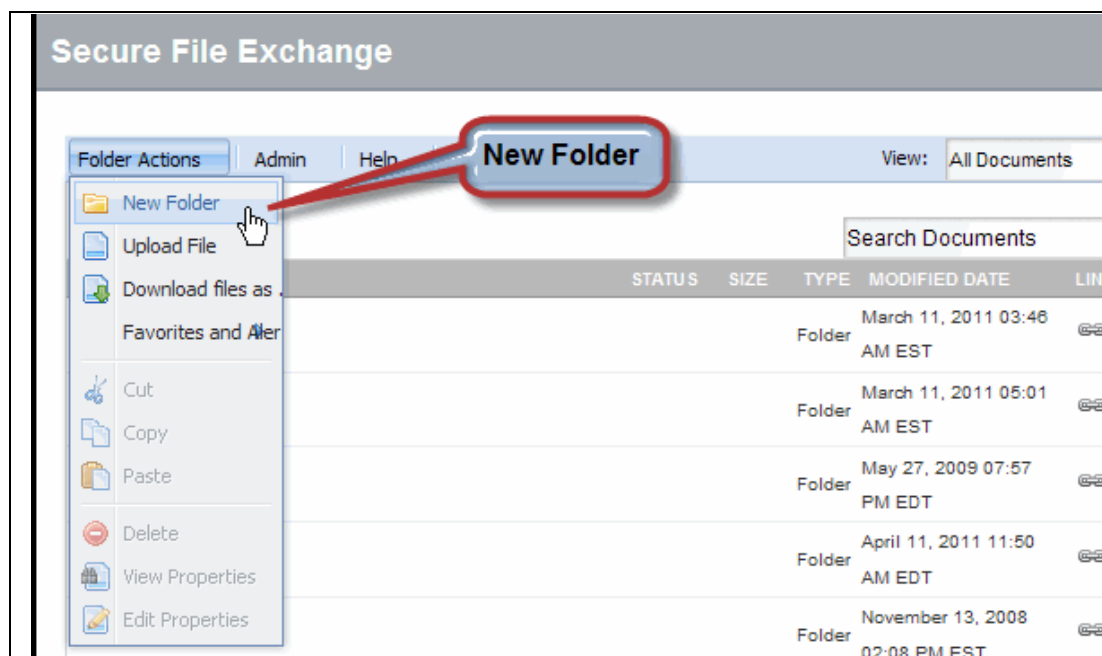
 This task can be performed only by an SFX Administrator.

 If you see 'no fax' in the Fax Number drop down menu, one of the following conditions exists:

- Your organization has not yet purchased fax functionality.
- Your fax functionality is not set up.
- All of your purchased fax numbers are used.

Contact your Covisint sales representative for details.

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:

The screenshot shows the 'Secure File Exchange' interface for creating a folder. The window title is 'Secure File Exchange'. At the top, there are navigation tabs: 'Folder Actions', 'Admin', and 'Help'. On the right, there is a 'View:' dropdown menu currently set to 'All Documents'. Below this is a 'HOME' section. The main area is titled 'CREATE FOLDER' in a blue header. Underneath, there are three input fields: 'Name:' with a text box, 'Fax number:' with a dropdown menu (currently showing '1234567890'), and 'Description:' with a text area and a vertical scrollbar. Below these fields is a section titled 'FOR ALL FILES WITHIN THIS FOLDER:'. It contains a checkbox labeled 'Require approval' which is unchecked. To the right of the checkbox is a red warning message: 'Approval settings on this folder override existing approval settings on files/folders within this folder'. At the bottom of the dialog are two buttons: 'OK' and 'CANCEL'.

- a. Type the *name* of the folder.

 We recommend that you include the fax number assigned to this folder in the Folder name field.


- b. From the Fax number drop down menu, select the *fax number* you want to assign to this folder. Once this number is assigned, it will be removed from the drop-down menu.
- c. Type a *description* of the folder.

 We recommend that you include the fax number assigned to this folder in the folder description field.

4. Optional: You can require approval on any updates made to items in this folder by selecting the **Require approval** check box. If you do not require approval, proceed to step 5.



Checking this box activates approval workflow. If the check box is selected, all files faxed to this folder require approval before they are made available to other users.

- a. Click  next to **Add Approvers**. The User Directory window displays.
- b. Search for and select each user and group you want to add as approvers of this item.
Note: You can select multiple approvers, but only one approval is required for publishing.
- c. Click **OK** to dismiss the User Directory window and populate approver names for the new folder.

5. Click **OK**.

RESULT:

You have successfully assigned a fax number to a new folder. Items faxed to this folder are stored in .PDF format. If approval is required on this folder, faxed items will remain in the *Pending* state until they are approved.

Assigning a Fax Number to an Existing Folder



This task can only be performed by an SFX Administrator.

When you assign a fax number, it is removed from the list of available fax numbers.



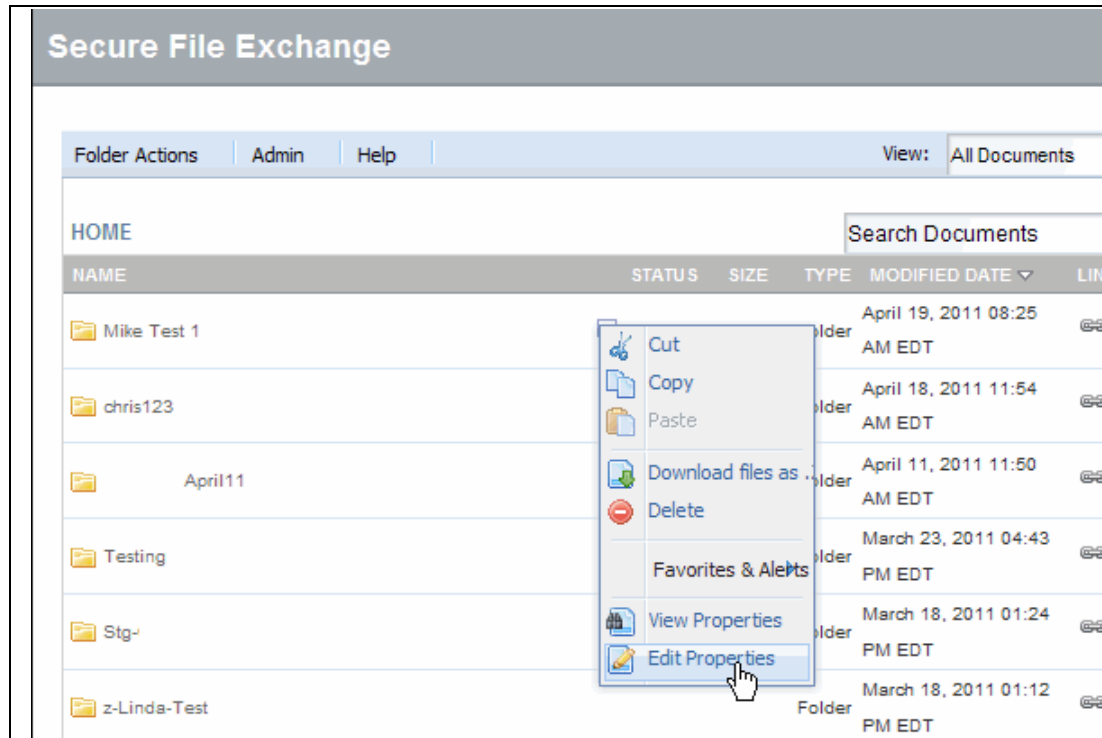
If you see 'no fax' in the Fax Number drop down menu, one of the following conditions exists:

- Your organization has not yet purchased fax functionality.
- Your fax functionality is not set up.
- All of your purchased fax numbers are used.

Contact your Covisint sales representative for details.

1. Navigate to the folder to which you want to assign a fax number.
2. Click the drop-down arrow at the far right of the folder name.

Where is the drop-down arrow?



3. Click **Edit Properties**. The Edit Properties fields display.
4. From the Fax number drop down menu, select the fax number you want to assign to this folder.
5. Optional: Edit the folder name to include the fax number assigned to this folder. We recommend that you include the fax number assigned to the folder in this description field.
6. Optional: Edit the description of the folder to include the fax number assigned to this folder. We recommend that you include the fax number in this description field.
7. Edit approval requirements as required. Refer to Creating a Folder for approval requirement details and work steps.
8. Some users can edit the owner of the file. (Refer to Changing File or Folder Owners for detailed work steps.
9. Click **OK**.
10. Optional: Modify access permissions to the file or folder by following the steps in the section entitled Modifying Access Rights.

RESULT:

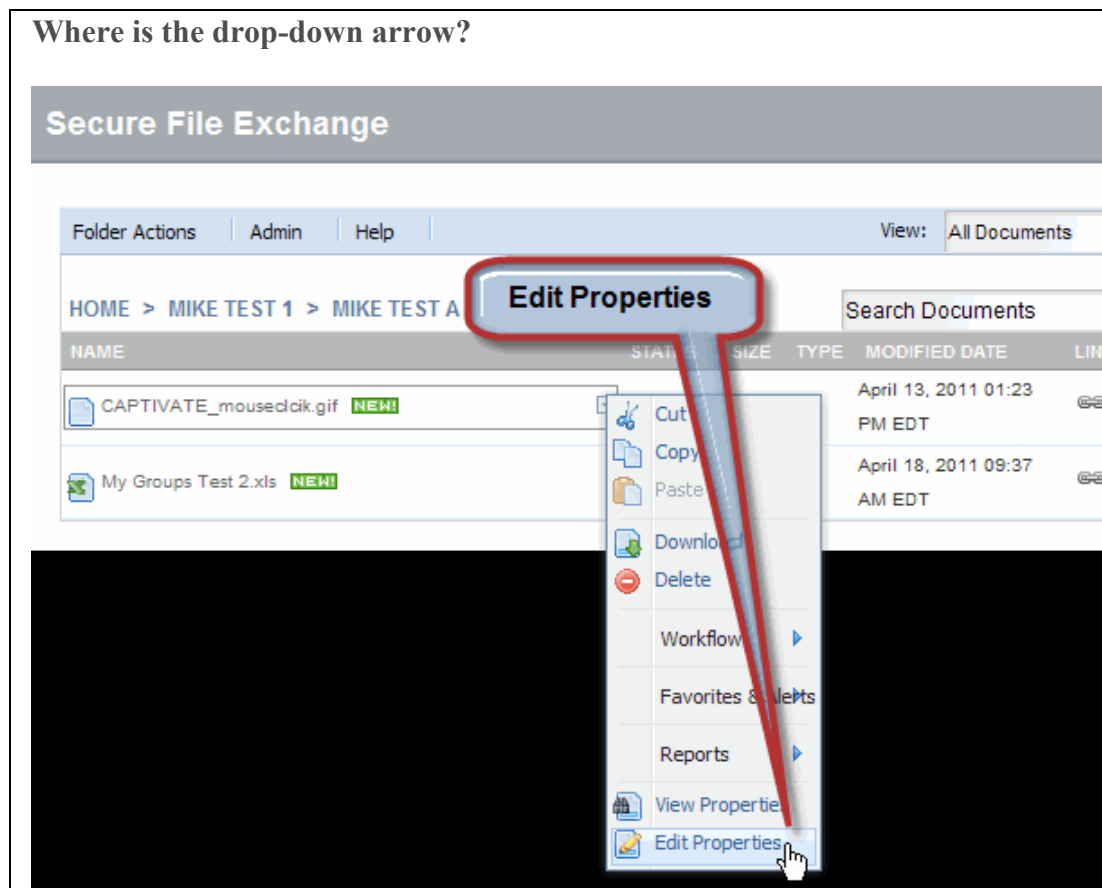
You have successfully assigned a fax number to an existing folder. Items faxed to this folder are stored in .PDF format. If approval is required on this folder, the faxed item will remain in pending state until approval has been granted.


Changing File or Folder Ownership

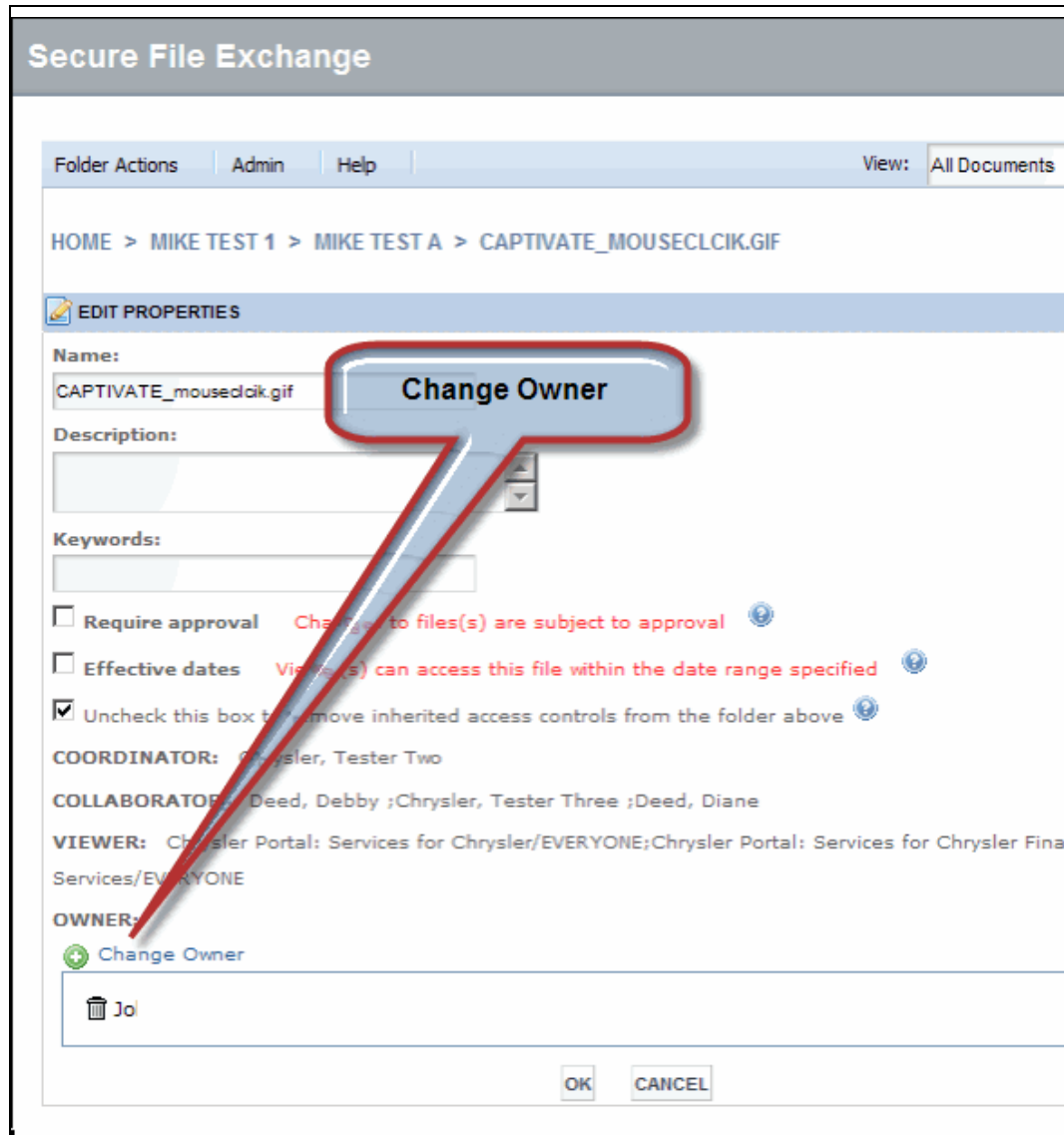
 This task can be performed only by an SFX Administrator.

A file or folder can have only one owner.

1. Navigate to the file or folder whose owner you want to change.
2. Click the drop-down arrow at the far right of the file/folder name.



3. Click **Edit Properties**. A list of file/folder properties is displayed.
4. Click  next to Change Owner. The User Directory window displays.



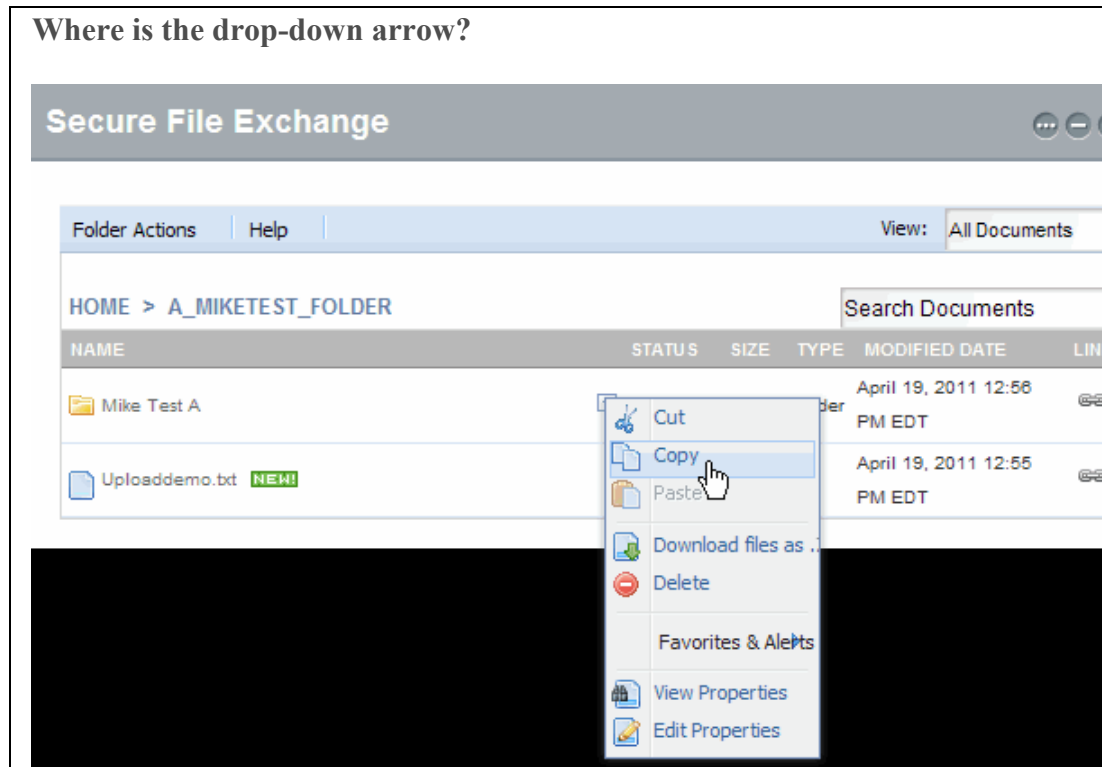
- a. Type the name (or partial name) of the user you want to assign as the item owner in the **Type in name** field.
 - b. If you want to restrict your search to individual users, click the **Include** drop-down arrow and select **Users** from the list.
 - c. Click **Find**. The screen refreshes, and the search results display.
 - d. Select the check box of the user you want to designate as the item owner. An item can have only one owner. The user's name displays in the Selected People box.
 - e. Click **OK**. The User Directory window closes and the owner selection displays in the Edit Properties window.
5. Click **OK**. The previous owner is removed from the item's ownership and the new owner is assigned.

RESULT:

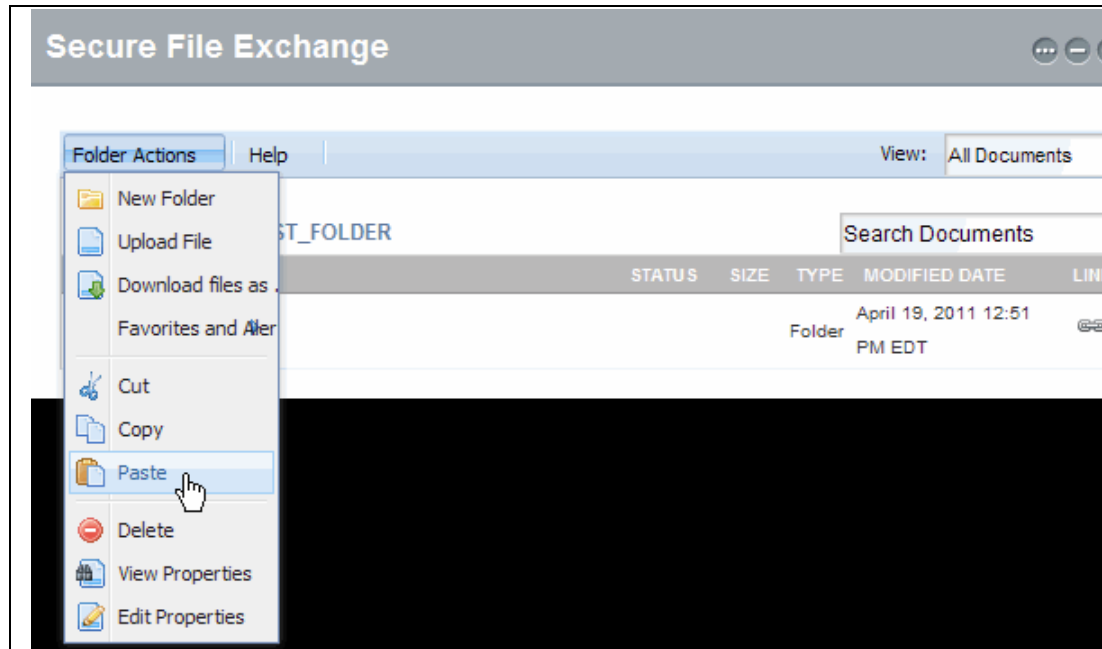
You have successfully changed ownership of a file or folder.


Copying a File or Folder to a New Location

1. Navigate to the file or folder you want to copy.
2. Click the drop-down arrow at the far right of the file or folder name.



3. Click **Copy**. The file or folder (with its files and subfolders) is copied to the clipboard.
4. Navigate to the target location.
5. From the Folder Actions menu, click **Paste**.



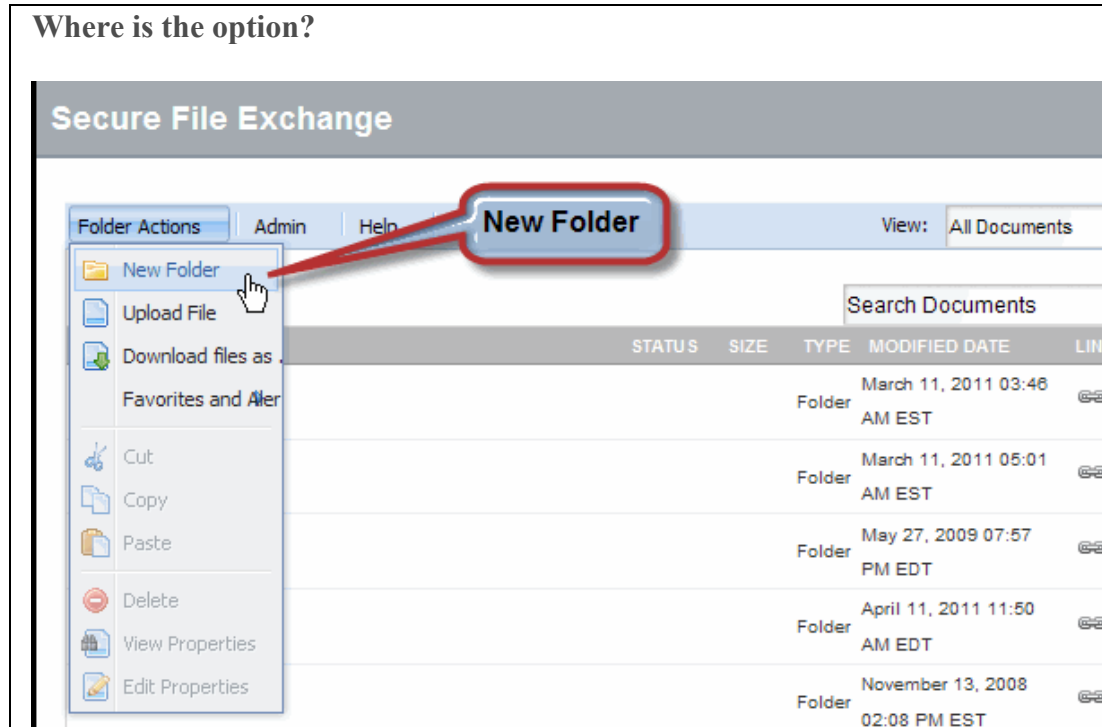
 Copying files or folders creates duplicate items. Changes to a file or folder in one location do not apply to copies in other locations.

RESULT:

You have successfully copied a file/folder to a new location.

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:

The screenshot shows a web-based interface for creating a folder. At the top, there is a header 'Secure File Exchange' and a navigation bar with 'Folder Actions', 'Admin', and 'Help'. On the right, it says 'View: All Documents'. Below this, the current location is 'HOME'. A blue bar contains the text 'CREATE FOLDER'. The form includes a 'Name:' text input field, a 'Fax number:' dropdown menu, and a 'Description:' text area with a vertical scrollbar. A blue bar below the form reads 'FOR ALL FILES WITHIN THIS FOLDER:'. Underneath, there is a checkbox for 'Require approval' with a red warning message: 'Approval settings on this folder override existing approval settings on files/folders within this folder'. At the bottom, there are 'OK' and 'CANCEL' buttons.


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

RESULT:

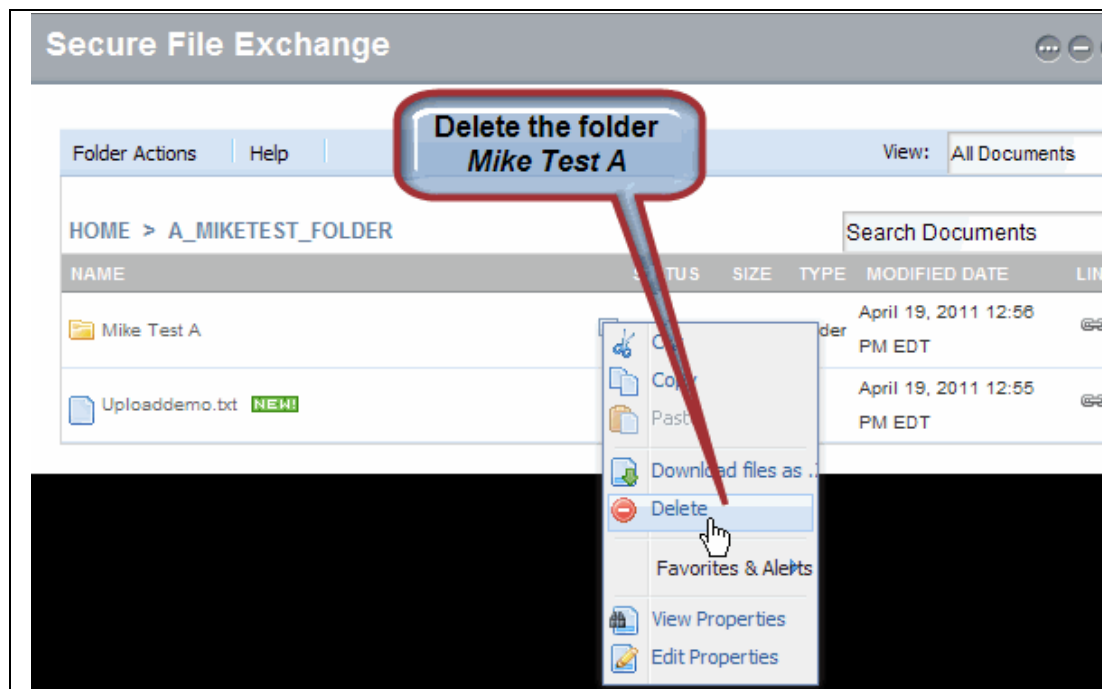
You have successfully created a folder. Next, you may want to:

- add a file to the folder
 - require approval on the folder (when available)
 - modify access rights to the folder
-

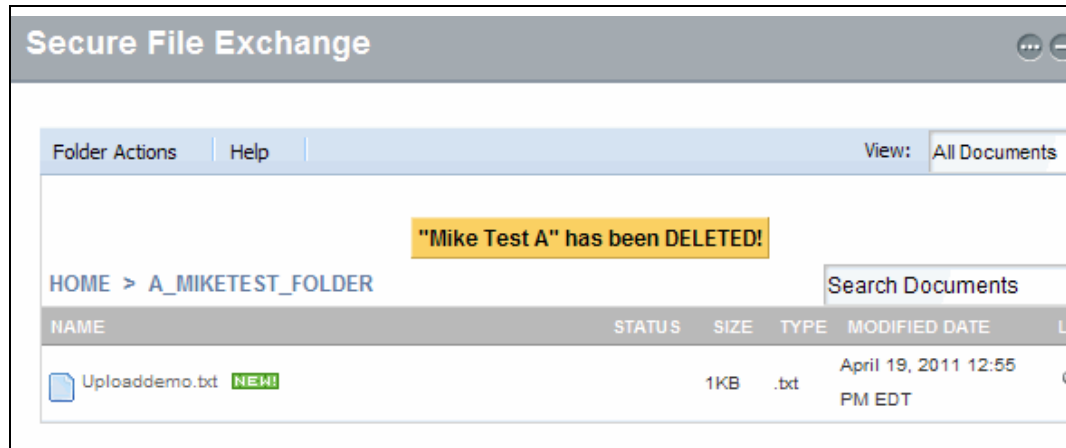
Deleting a Folder

 You must be the folder owner (or have an appropriate SFX role) to delete a folder. A deleted file or folder is moved to the SFX Repository Recycle Bin. Only an SFX Administrator can restore files that have been moved to the recycle bin.

1. Navigate to the folder you want to delete from SFX.
2. Click the drop-down arrow at the far right of the folder name.




3. Click **Delete**. A deletion confirmation dialog displays.
4. Click **Yes** to confirm the deletion.
5. The folder, along with all its contents and subfolders, is deleted. The screen refreshes and displays an update confirmation.

**RESULT:**

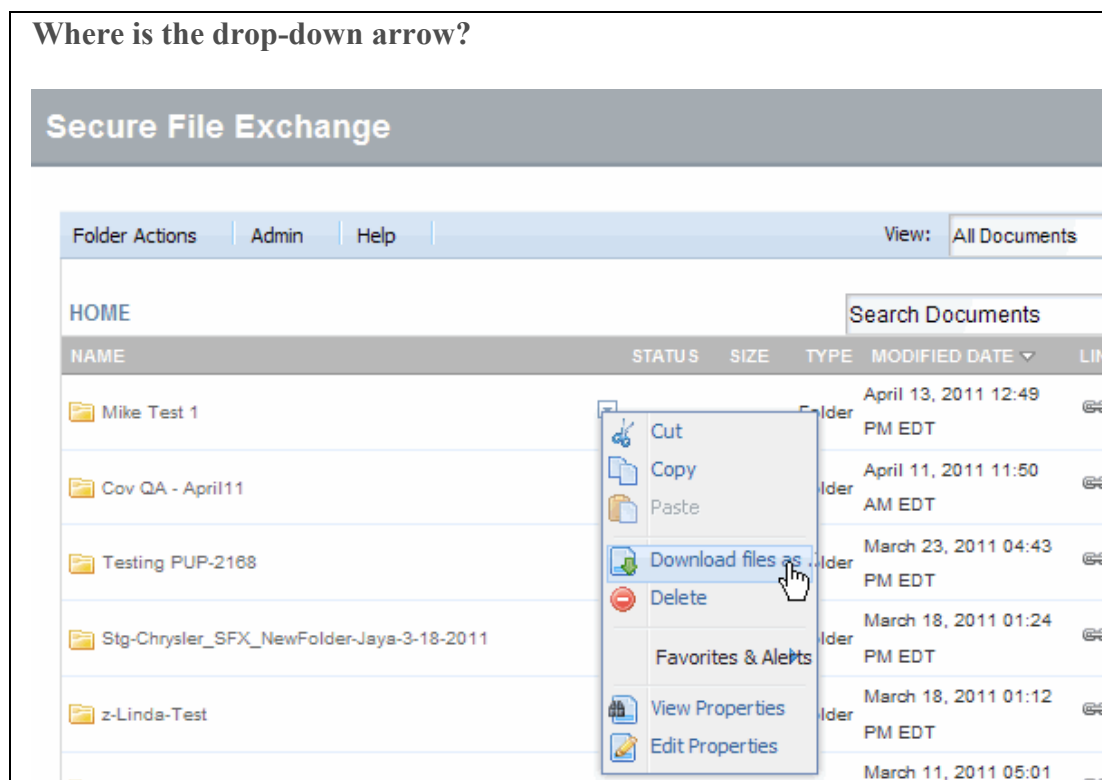
You have successfully deleted a file.

Downloading a Folder and its Files

 This task does not download subfolders and their contents. You can perform this task only to download the files that are stored directly under a folder. For example, if *My Folder 1* contains only folders, you cannot download *My Folders 1*, even if its subfolders contain files.

You can download a folder and the files stored directly under it as a zip file.

1. Navigate to the folder you want to download.
2. Click the drop-down arrow at the far right of the file name.



3. Click **Download files as...**
4. The system generates a zip file of the files within the folder and prompts you to open or save the file. Click **Save**.
5. Navigate to the location to which you want to save the generated zip file and click **OK**. The zip file is saved.

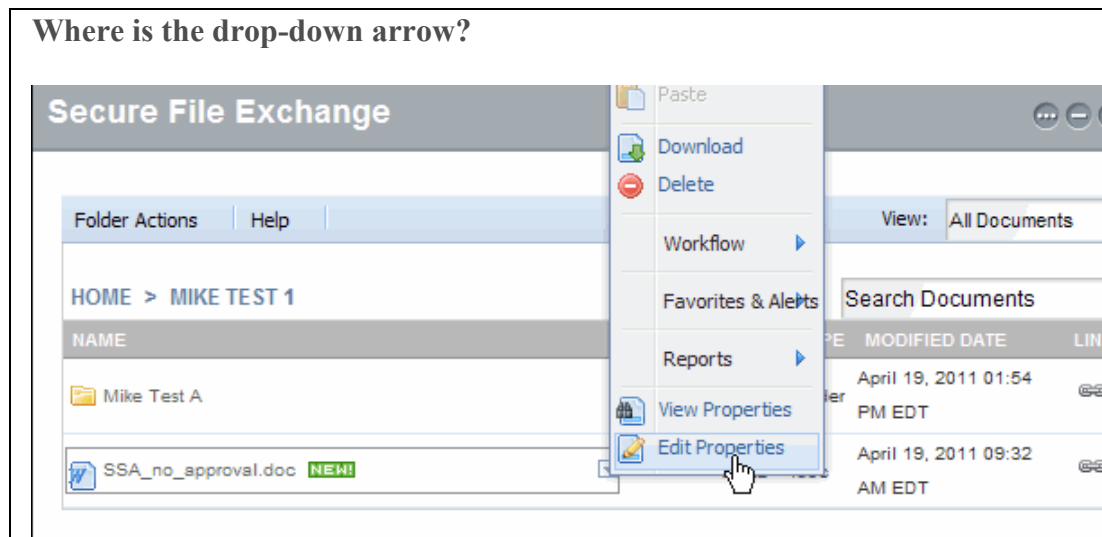
RESULT:

You have successfully downloaded a folder and its contents.

Editing File or Folder Properties

 You must be the item owner or have the required permissions to perform this task.

1. Navigate to the file or folder whose properties you want to edit.
2. Click the drop-down arrow at the far right of the file/folder name.



3. Click **Edit Properties**. The Edit Properties window displays.
4. Edit the properties as desired.
 - a. Edit approval requirements as desired. (Refer to the section entitled Removing Approval Requirements from a File or Folder or Requiring Approval on a File for further details)
 - b. Some users can change the file owner. See Changing File / Folder Owners for details.
 - c. Optionally, modify access permissions to the file or folder by following the steps in the section entitled Modifying Access Rights.
5. Click **OK**.

RESULT:

You have successfully edited the properties of a file or folder.

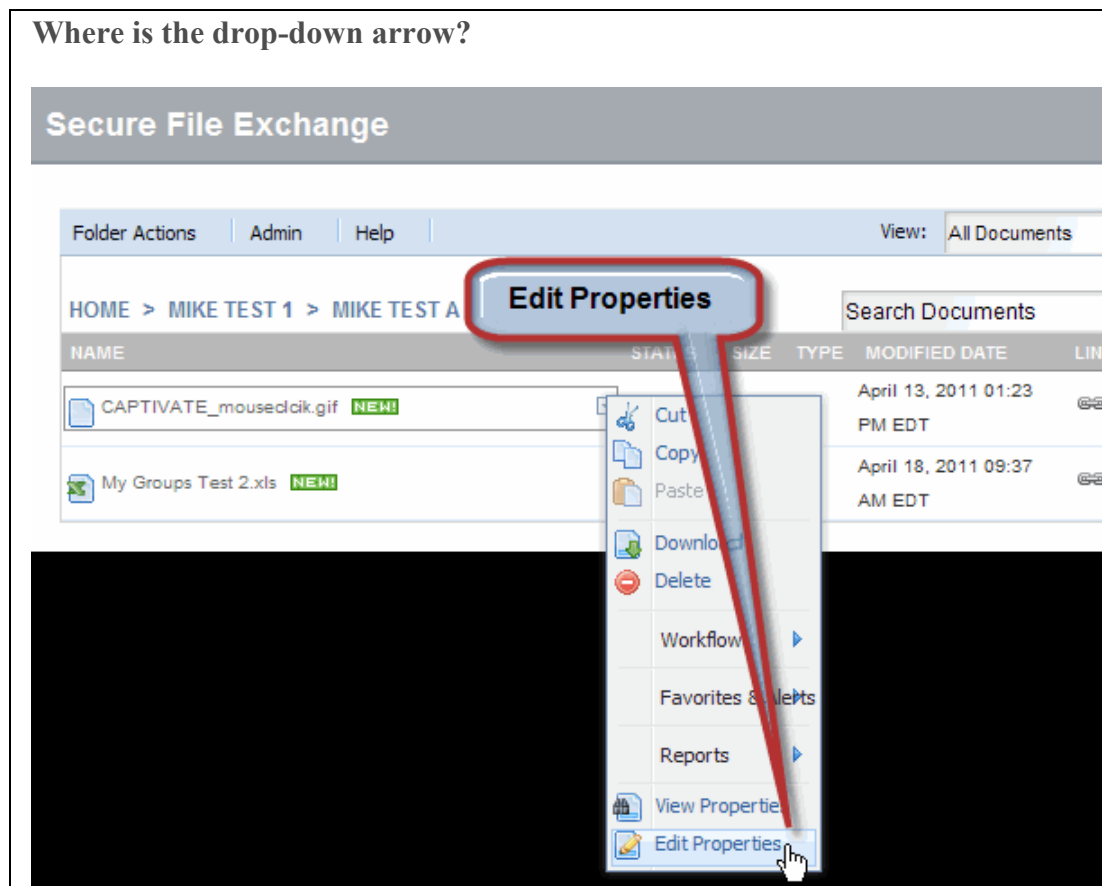
Modifying Access Rights to a File or Folder

- i** Files and folders inherit access rights from the folder in which they reside. Users with appropriate privileges can modify access rights.

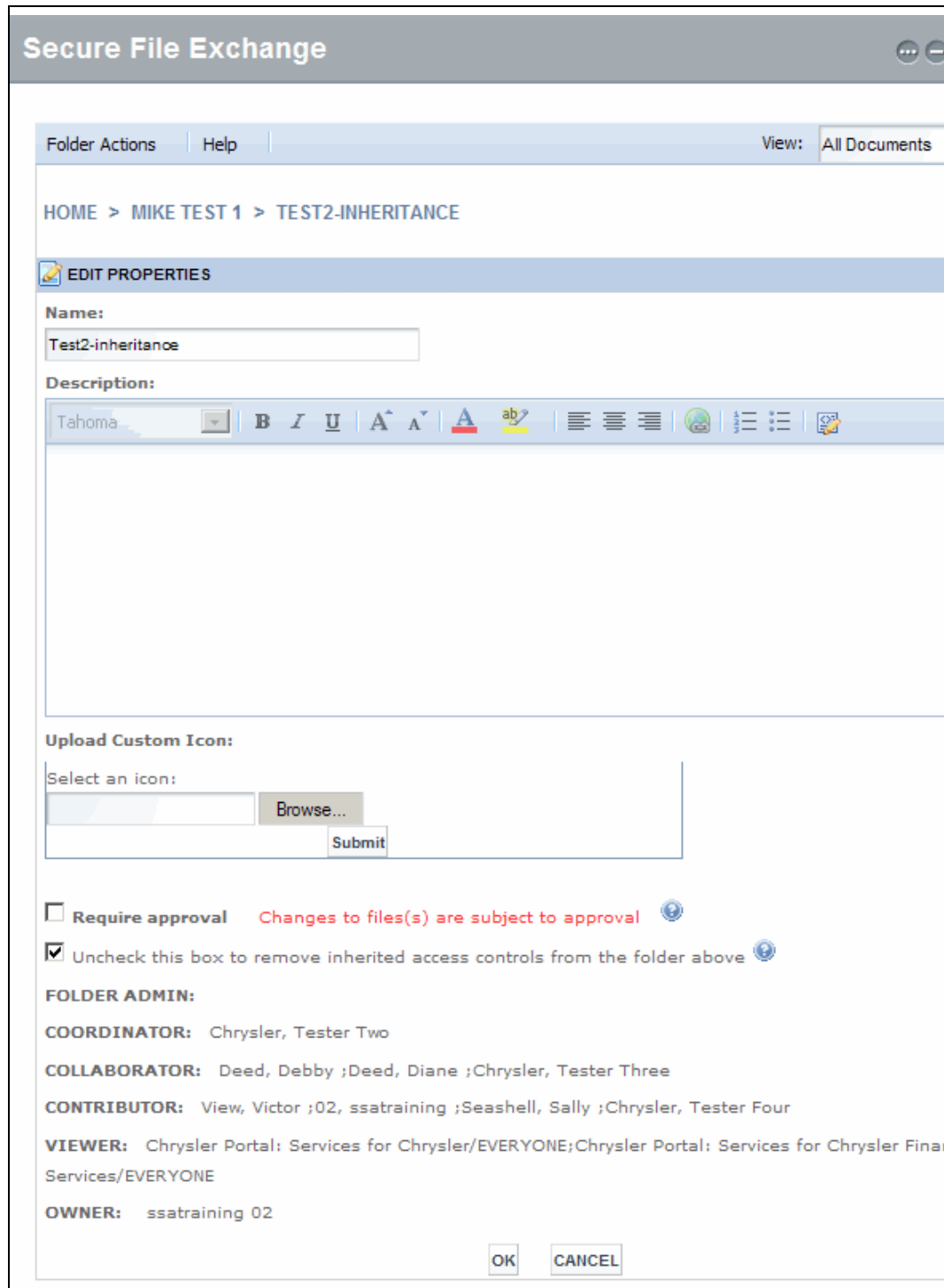
Performing these steps to a folder applies to the folder, and to its subfolders - unless you further modify the subfolders.

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.



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

Upload Custom Icon:
Select an icon:
Browse... Submit

Require approval Changes to file(s) are subject to approval

Check this box to inherit access controls from the folder above

FOLDER ADMIN:

COORDINATOR:

+ Add Members

Tester Two

COLLABORATOR:

+ Add Members

Deed, Debby , Deed, Diane

CONTRIBUTOR:

+ Add Members



View, Victor , 02, ssatraining , Seashell, Sally

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**.

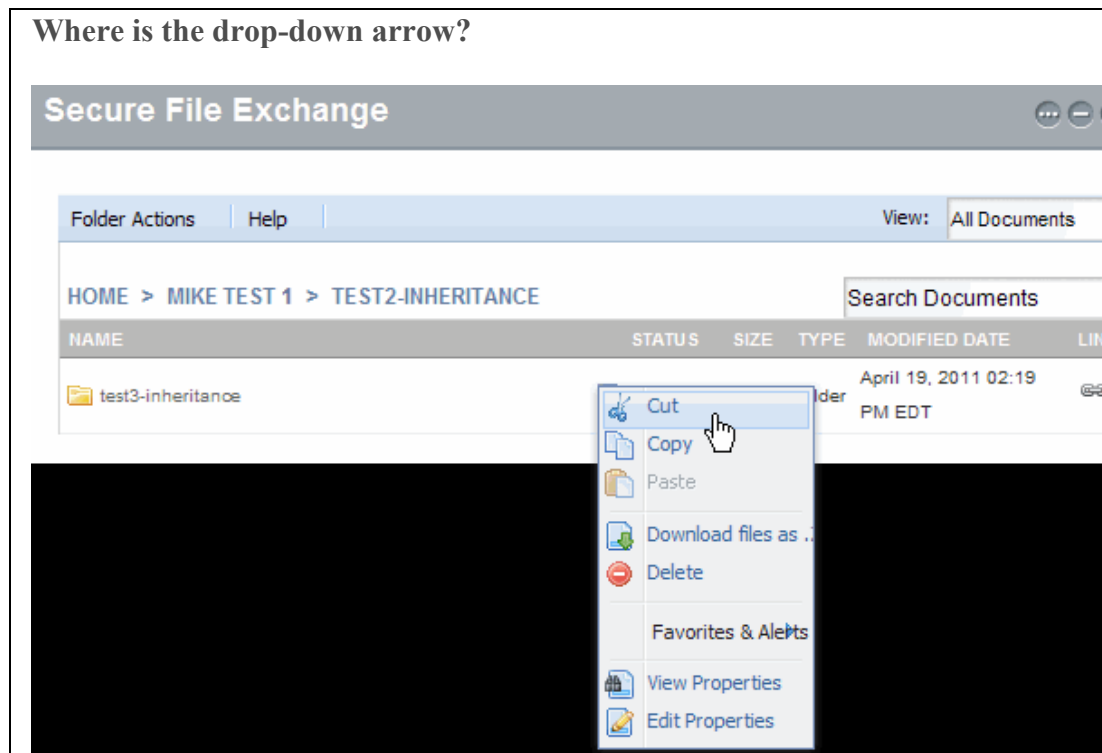
RESULT:

You have successfully modified access rights on an item.

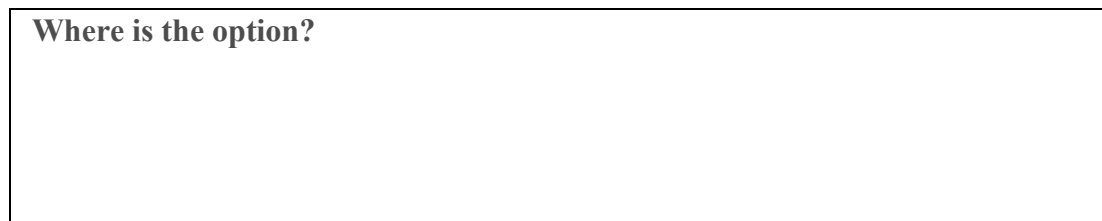
Moving a File or Folder with Cut

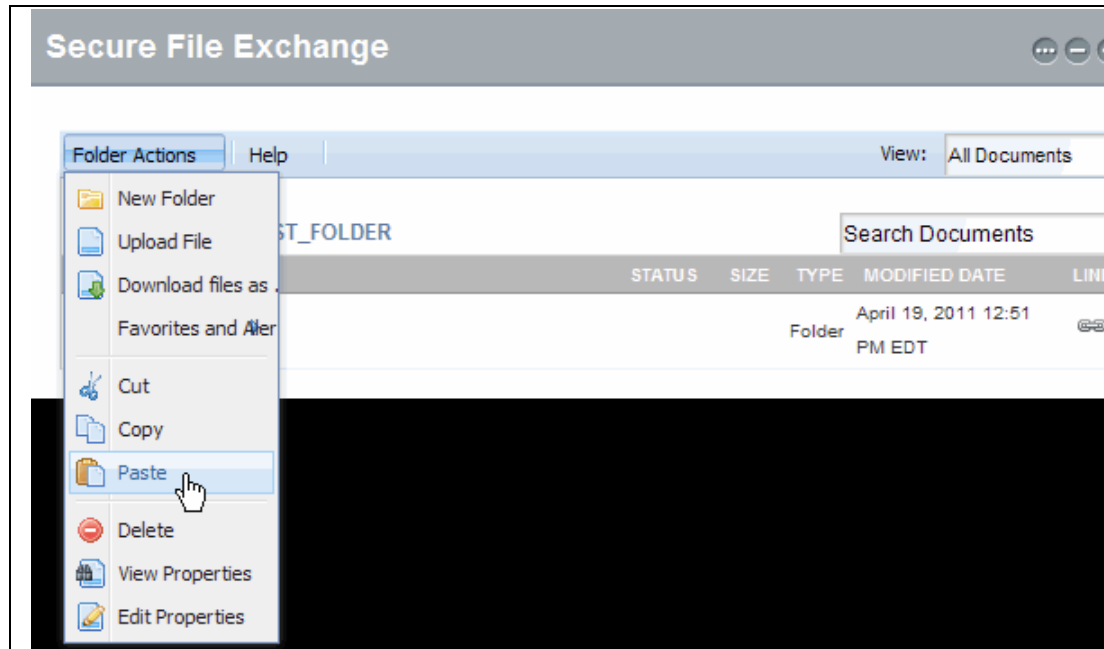
 You must be the file or folder owner or have an appropriate role to move a file or folder using Cut.

1. Navigate to the file or folder you wish to move.
2. Click the drop-down arrow at the far right of the file name.



3. Click **Cut**.
4. Navigate to the location to which you want to move the file or folder..
5. From the Folder Actions menu, click **Paste**.





RESULT:

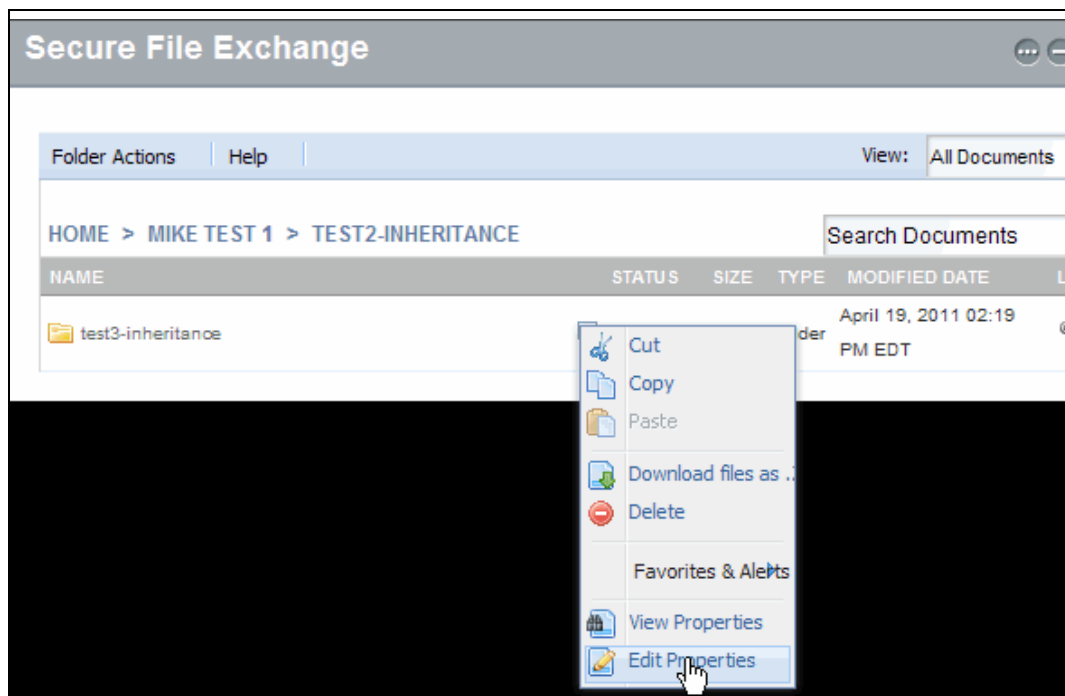
You have successfully cut and pasted a file or folder.

Requiring Approval on a Folder

If your SFX Administrator configures all items in the repository to require approval, approvers are established at the repository level for all folders and files within the repository. You cannot turn off approval workflow for your items, and you cannot select your own approvers.

If approval is not required at the top repository level, you can require approval on folders for which you are the owner or administrator. Complete the following steps to require approval on a folder.

1. Navigate to the folder for which you want to require approval.
2. From the folder drop down menu, click **Edit Properties**. The Edit Properties window displays.



3. Select the **Require approval** check box. The Add Approvers option displays.

Secure File Exchange

Folder Actions Help View: All Documents

HOME > MIKE TEST 1 > TEST2-INHERITANCE > TEST3-INHERITANCE

EDIT PROPERTIES

Name: test3-inheritance

Description:

Tahoma

Upload Custom Icons:

Select an icon: Browse... Submit

Require approval Changes to file(s) are subject to approval

Add Approvers

Uncheck this box to remove inherited access controls from the folder above

FOLDER ADMIN:

COORDINATOR: Chrysler, Tester Two

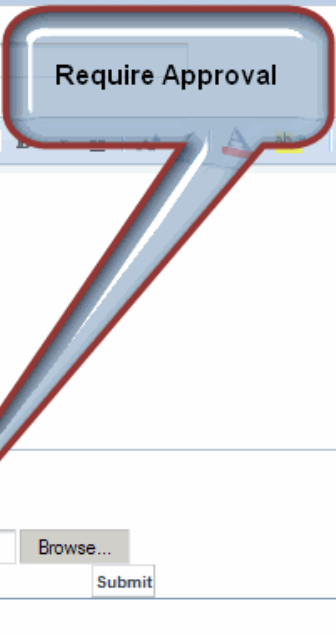
COLLABORATOR: Deed, Diane ;Deed, Debby

CONTRIBUTOR: View, Victor ;02, ssatraining ;Seashell, Sally

VIEWER: Chrysler Portal: Services for Chrysler/EVERYONE;Chrysler Portal: Services for Chrysler Financial Services/EVERYONE

OWNER: ssatraining 02

OK CANCEL



4. Select the **Require approval** check box. The Add Approvers option is enabled.
5. Click next to **Add Approvers**. The User Directory window displays.
 - a. Type the name (or partial name) of the user or group you want to add as approvers 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 as approvers. The users display in the Selected People box.
 - e. Repeat steps a through d as required until you are finished adding approvers.
 - f. Click **OK**. The User Directory window closes and the approvers display in the Add Approvers field.
6. Click **OK**. The screen refreshes, and a message confirming the updated properties displays.

RESULT:

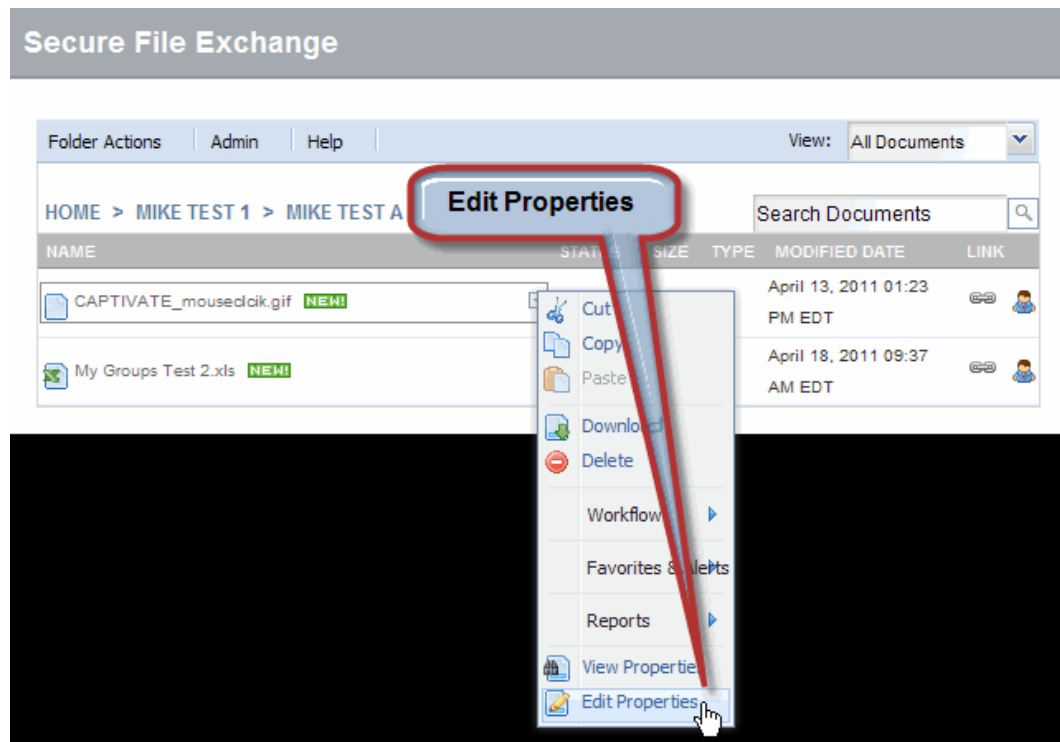
You have successfully required approval on a folder.

Removing Approval Requirement from a Folder or File

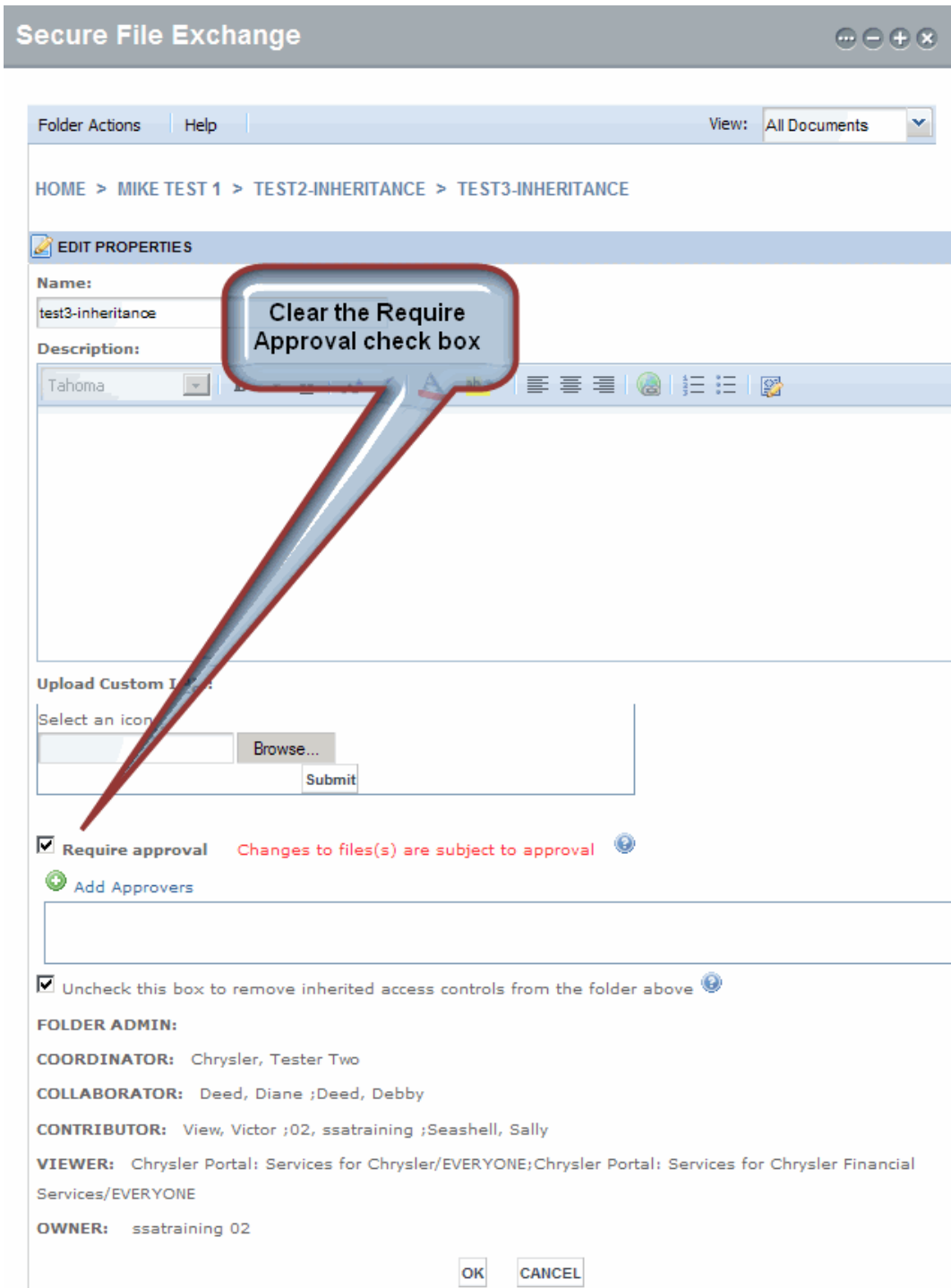
If your SFX Administrator configures all items in the repository to require approval, approvers are established at the repository level for all folders and files within the repository. You cannot turn off approval workflow for your items, and you cannot select your own approvers.

When approval is not turned on at the top repository level, it can be required by the folder or file owner or administrator. If you are the owner or administrator, you can remove previously configured approval requirements. Complete the following steps to remove approval requirements on a folder or file.

1. Navigate to the folder or file for which you wish to remove approval requirements.
2. From the item drop down menu, click **Edit Properties**. The Edit Properties window displays.



3. Clear the **Require approval** check box.



4. Click **OK**. The screen refreshes, and a message confirming the updated properties displays.

RESULT:

You have successfully removed approval requirements from a folder or file.

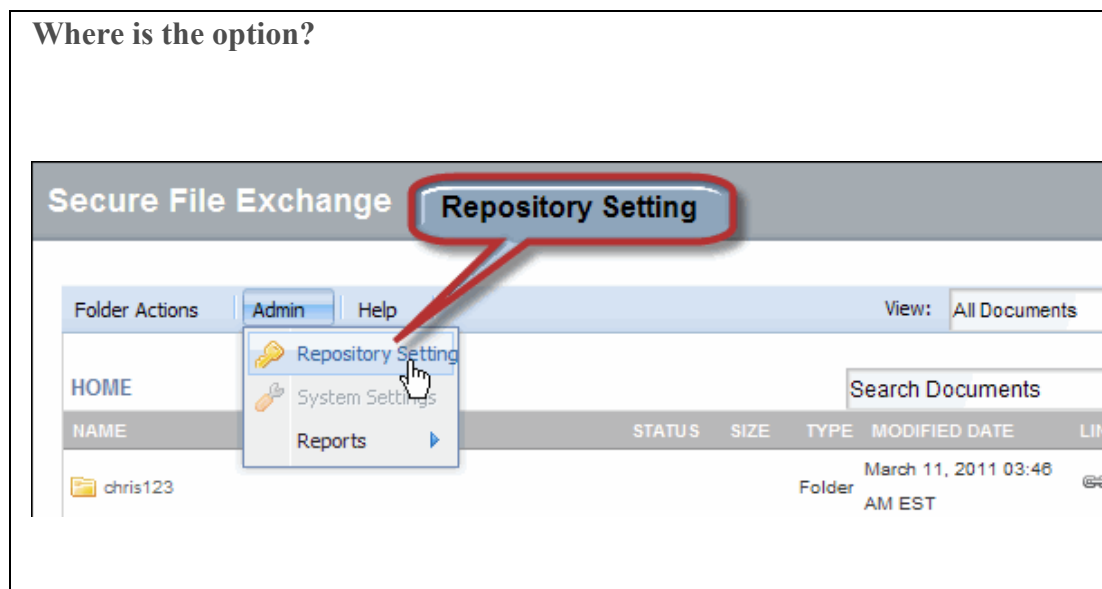
ADMINISTRATION


Assigning Users to Roles in SFX Repository

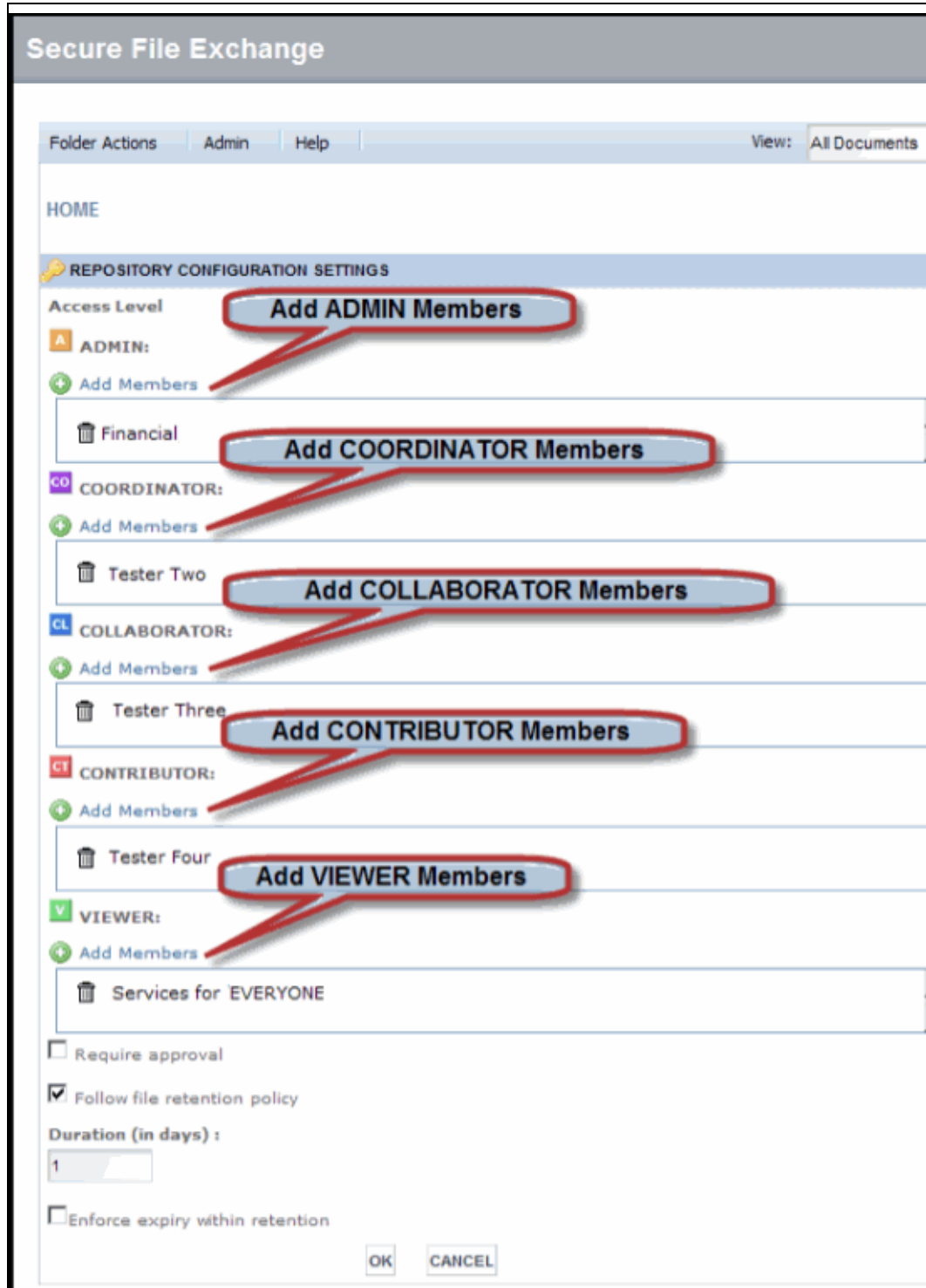
 This task can only be performed by an SFX Administrator.

Caution: Changes made to the Repository Settings impact everything from the top-level Home folder down. For example, if you add a user or group to the Administrator role, that user or group becomes an Administrator for the entire SFX instance.

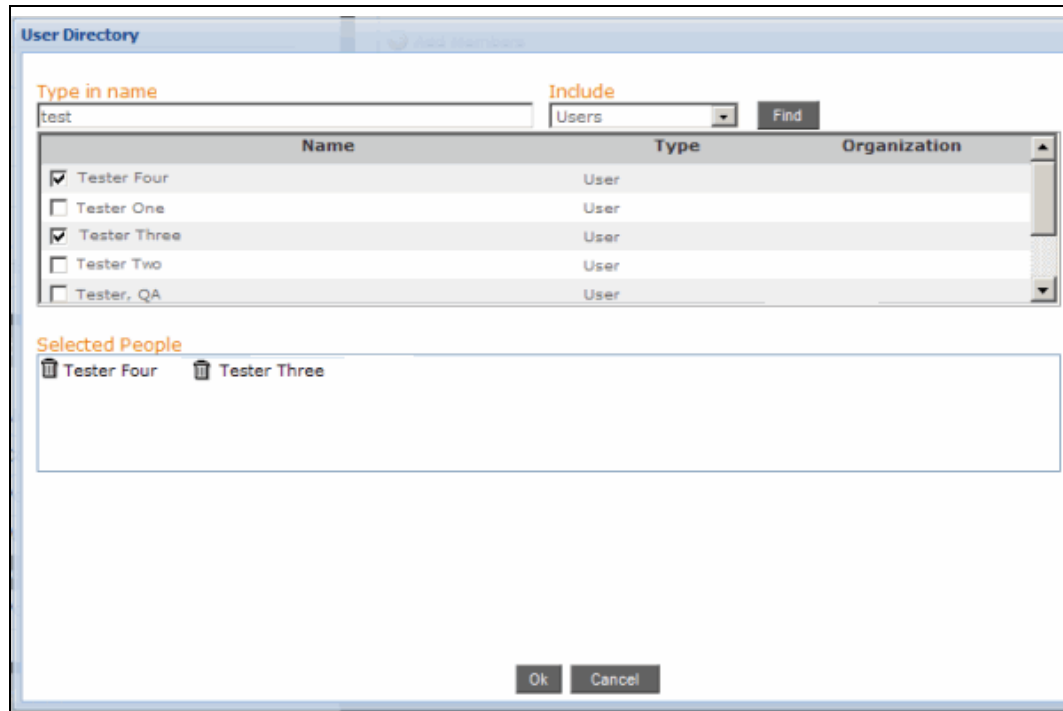
1. From the Admin menu, click **Repository Settings**.



2. Click  next to Add Members in the role type to which you wish to add users. The User Directory window displays.



3. Search for and Select the people you want to add to the role for which you clicked Add Members.



- a. Type the name (or partial name) of the user or group 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**.
 - c. Click **Find**. The screen refreshes, and the search results display.
 - d. Select the check box of each user or group you want to add to the selected SFX role. Checked users display in the Selected People list.
 - e. Click **OK**. The User Directory window closes and the users you added display in the appropriate role section under REPOSITORY CONFIGURATION SETTINGS.
4. Repeat steps 2 and 3 for each role to which you want to add users.
 5. Click **OK**. The SFX HOME page displays in your portal.

RESULT:

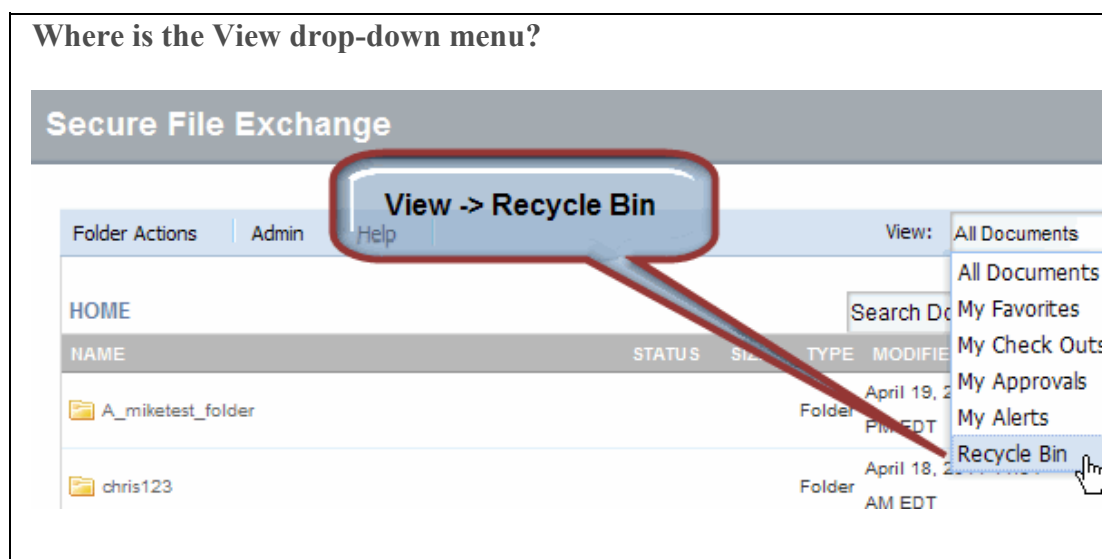
You have successfully added users to roles in SFX


Emptying the Recycle Bin

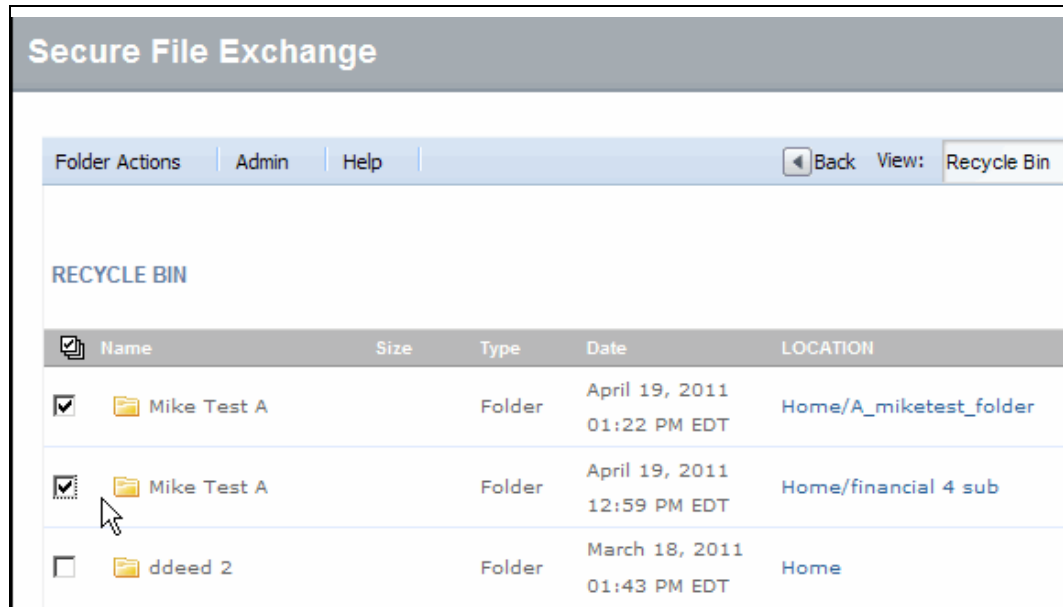
 This task can only be performed by an SFX Administrator.

You can permanently remove individual files from the Recycle Bin, or you can completely empty it.

1. Click **Recycle Bin** from the View drop-down menu. The Recycle Bin window displays.



2. Select the check box of each item you want to permanently delete, or click  to *select all* documents in the recycle bin.



3. Click **Delete**. A deletion confirmation dialog displays.



Important: Once a file has been deleted from the Recycle Bin, it cannot be restored.

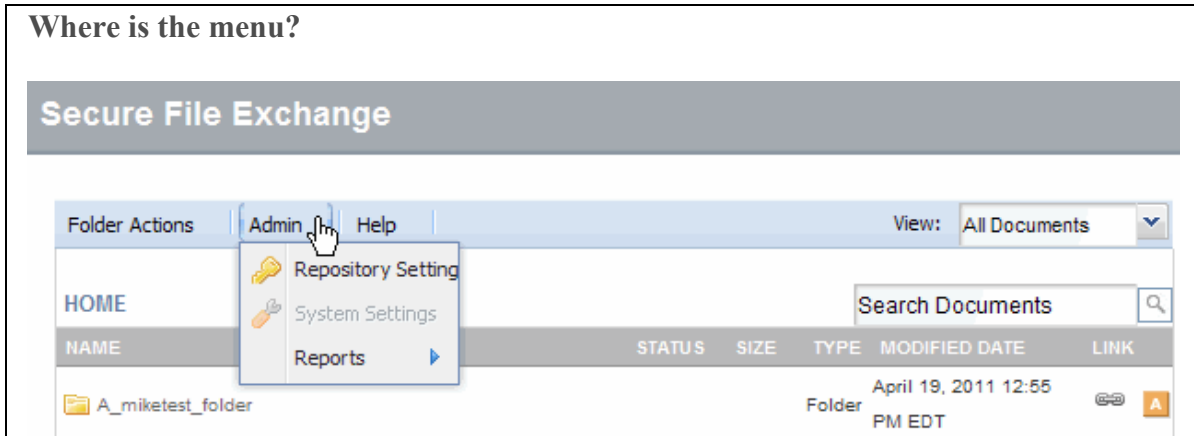
4. Click **Yes** to confirm the deletions. The screen refreshes, the selections are deleted, and a deletion completed message displays.

RESULT:

You have successfully emptied the recycle bin.

Managing the Admin Tab

From the Admin menu, you can view the following:




- **Repository Settings** - Add or Remove Users / Groups from the SFX repository.
- **Overview** - Reports on the total space used, number of folders, and number of files.
- **User Disk Space** - Provides a report of the top 50 users with most disk space.
- **Largest Files** - Provides a report on the top 50 largest files.
- **Most Accessed Files** - Provides a report on the top 50 most accessed files.
- Auto-Loader functionality - if your organization has contracted for that option.

Removing Approvers from Files or Folders

Refer to [Modifying Access Rights](#) to remove Approvers from a File or Folder

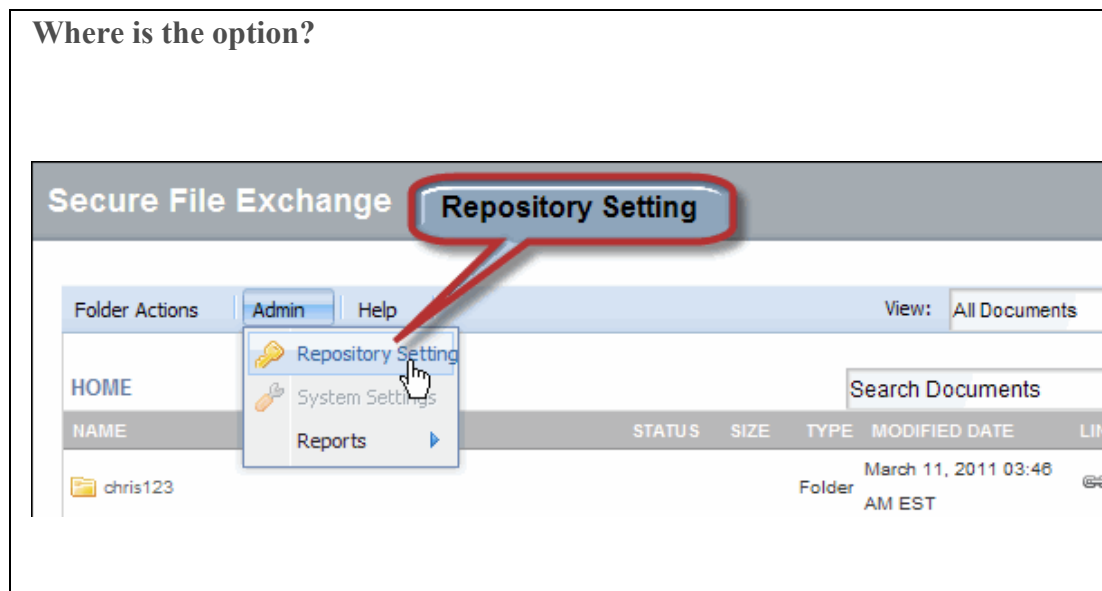
Removing Users and Groups from Roles in SFX Repository


 This task can only be performed by an SFX Administrator.

Caution: Removing Users and Groups at the repository level restricts them from accessing anything within SFX.

If you want to remove users or groups from particular files or folders, do not perform this procedure. Instead, modify access rights to the item.

1. From the Admin menu, click **Repository Settings**. The Repository Configuration Settings window displays.



2. Click the wastebasket icon  next to the name of each user or group you want to remove.

The screenshot displays the 'Secure File Exchange' administration console. At the top, there are navigation tabs for 'Folder Actions', 'Admin', and 'Help', and a 'View: All Documents' dropdown. The main content area is titled 'REPOSITORY CONFIGURATION SETTINGS' and is organized into sections based on access levels: ADMIN, COORDINATOR, COLLABORATOR, CONTRIBUTOR, and VIEWER. Each section includes an 'Add Members' button and a list of existing members with delete icons. A red callout box with the text 'Click to delete' and arrows points to the delete icons for 'Clar' in the ADMIN section and 'Tester Two' in the COORDINATOR section. Below the member lists, there are checkboxes for 'Require approval', 'Follow file retention policy', and 'Enforce expiry within retention'. A 'Duration (in days):' field is set to '1'. At the bottom right, there are 'OK' and 'CANCEL' buttons.

3. Click **OK**.

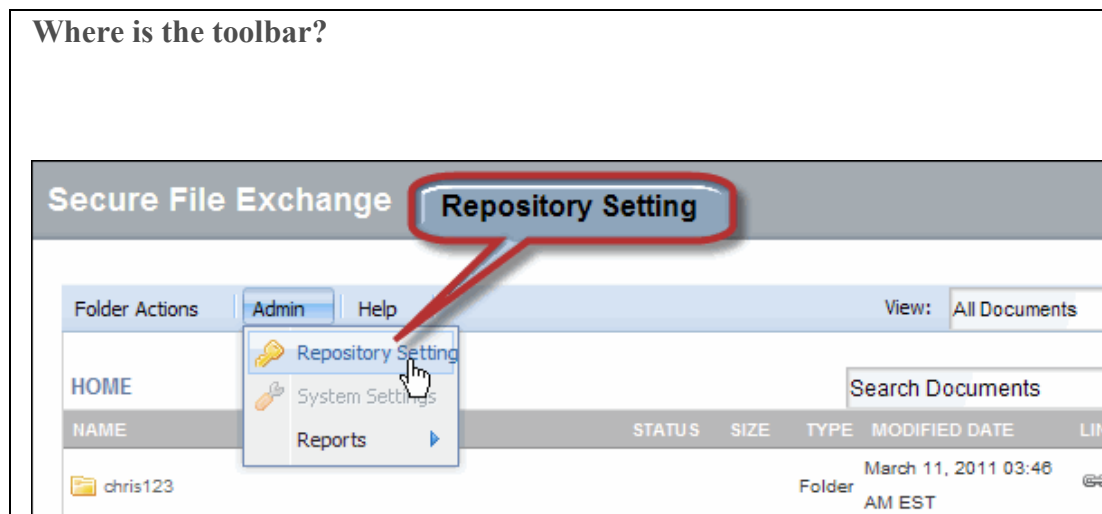
RESULT:


You have successfully removed users from roles in SFX.

Requiring Approval for all Files and Folders in SFX

 This task can only be performed by an SFX Administrator.

1. From the Admin menu, click **Repository Settings**. The Edit Properties window displays.



2. Select the **Require approval** check box. The Add Approvers option displays.
3. Click  next to **Add Approvers**. The User Directory window displays.
 - a. Type the name (or partial name) of the users you want to assign as item approvers 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 each user or group you want to designate as an approver. The names display in the Selected People box.
 - e. Click **OK**. The User Directory window closes and the selected approvers display in the Edit Properties window Add Approvers list.
4. Click **OK**. The screen refreshes, and a message confirming the updated properties displays.

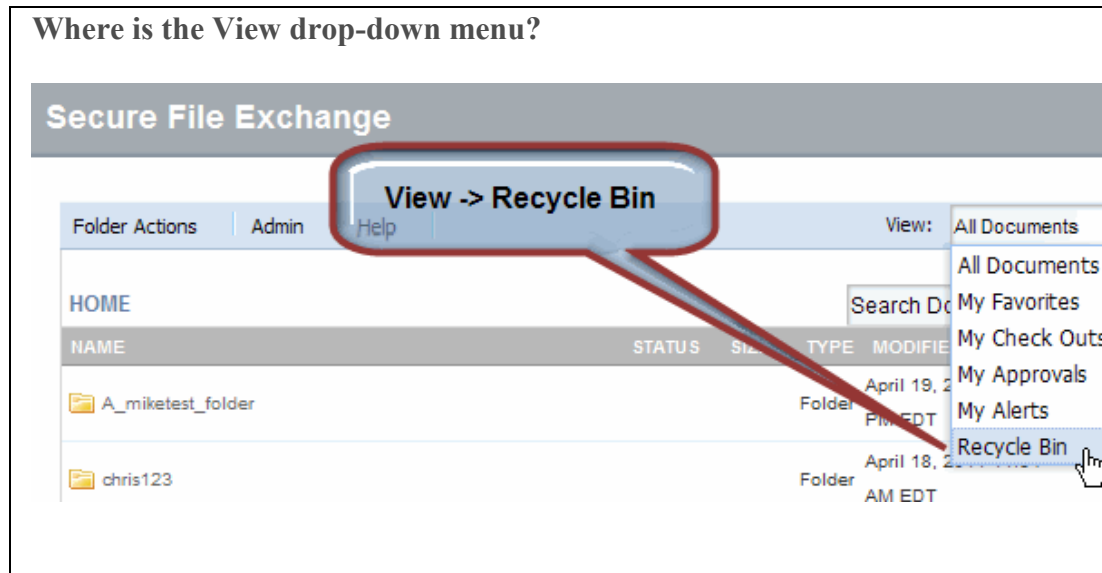
RESULT:


You have successfully added approvers for all files/folders in SFX.

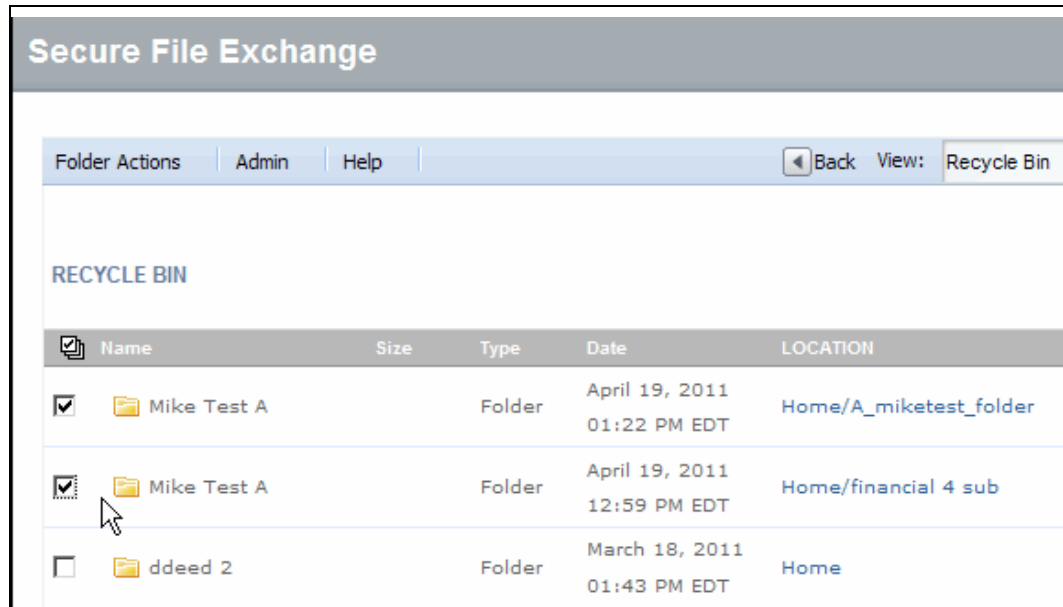
Restoring from the Recycle Bin

 This task can only be performed by an SFX Administrator.

1. Click **Recycle Bin** from the View drop-down menu.



2. Select the check box of each item you want to restore, or click  to *select all* documents in the recycle bin.



3. Click **Restore**. The items are restored to the repository locations from which they were deleted.
4. Click **All Files** from the View drop down menu to return to the folder structure.

RESULT:

You have successfully restored items from the recycle bin.

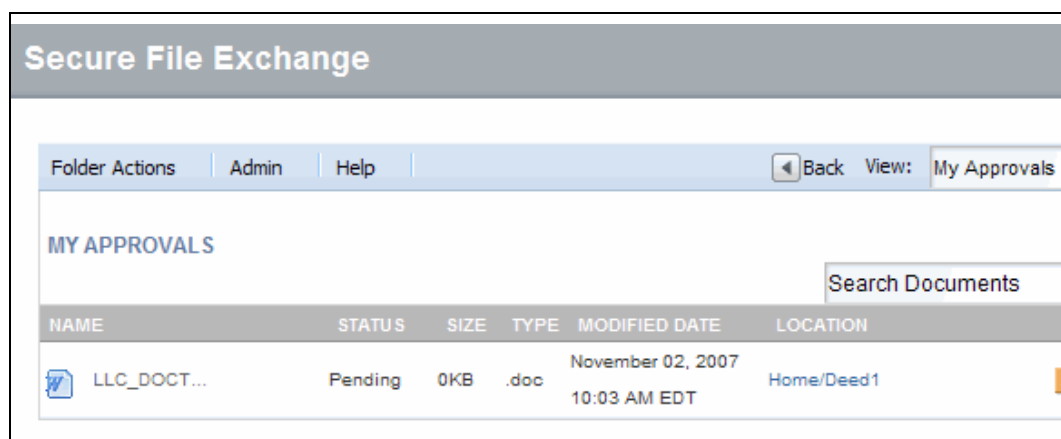
Approving a Pending Draft File

This procedure assumes you have reviewed a draft file that is Pending approval, and you are ready to approve it.

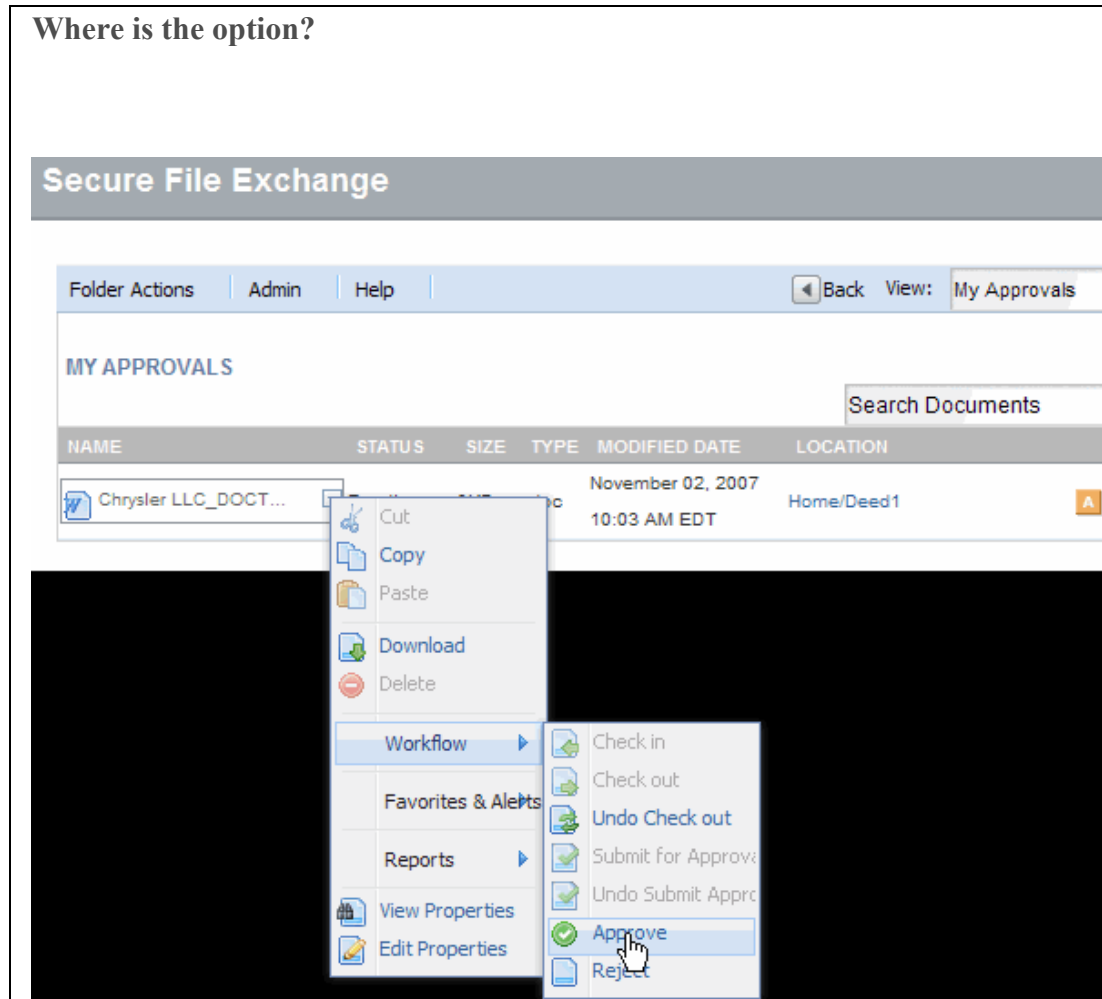
1. Click **My Approvals** from the View drop-down menu. The list of "Pending" files for which you are an approver displays.



2. In the list of Pending files , navigate to the draft file you wish to approve.



3. Click the drop-down arrow at the far right of the file name.



4. From the Workflow option, click **Approve**.
5. Click **OK**. The file is published and the Contributor is notified via email.

RESULT:

You have successfully approved a draft file.

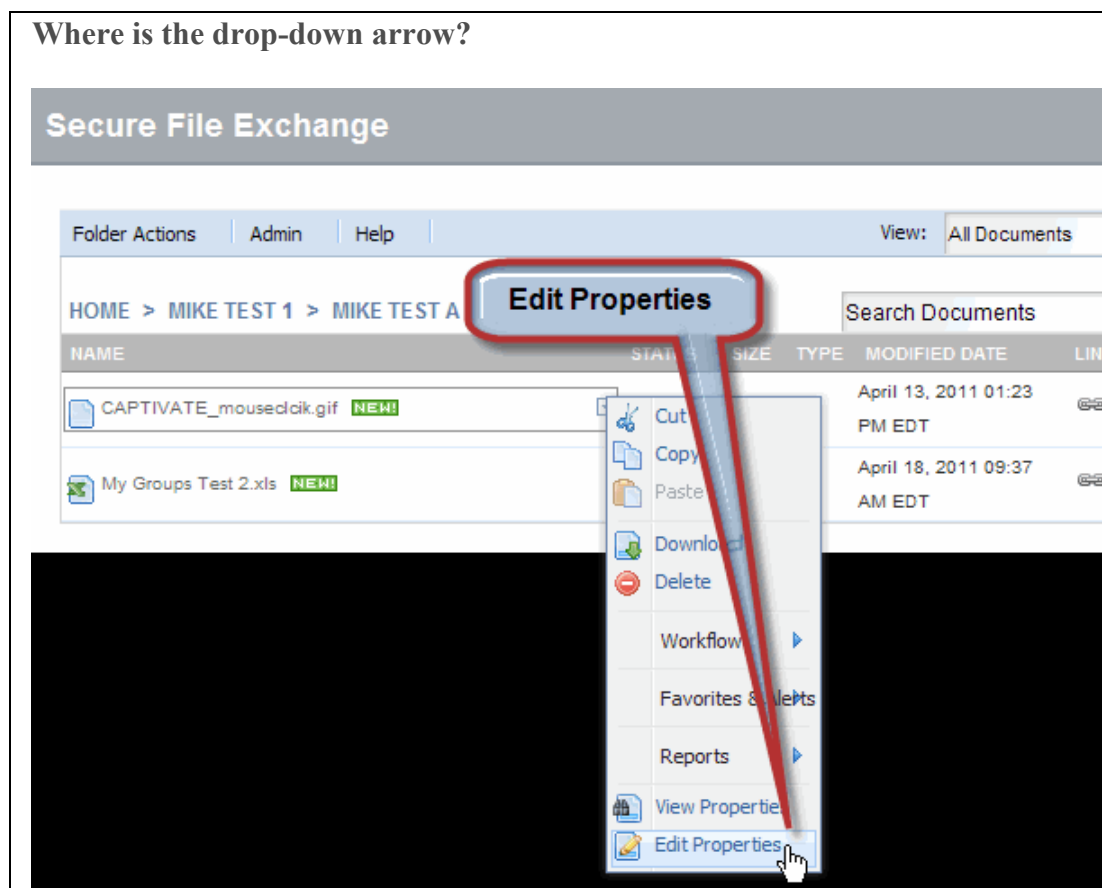
Modifying Access Rights to a File or Folder

- i** Files and folders inherit access rights from the folder in which they reside. Users with appropriate privileges can modify access rights.

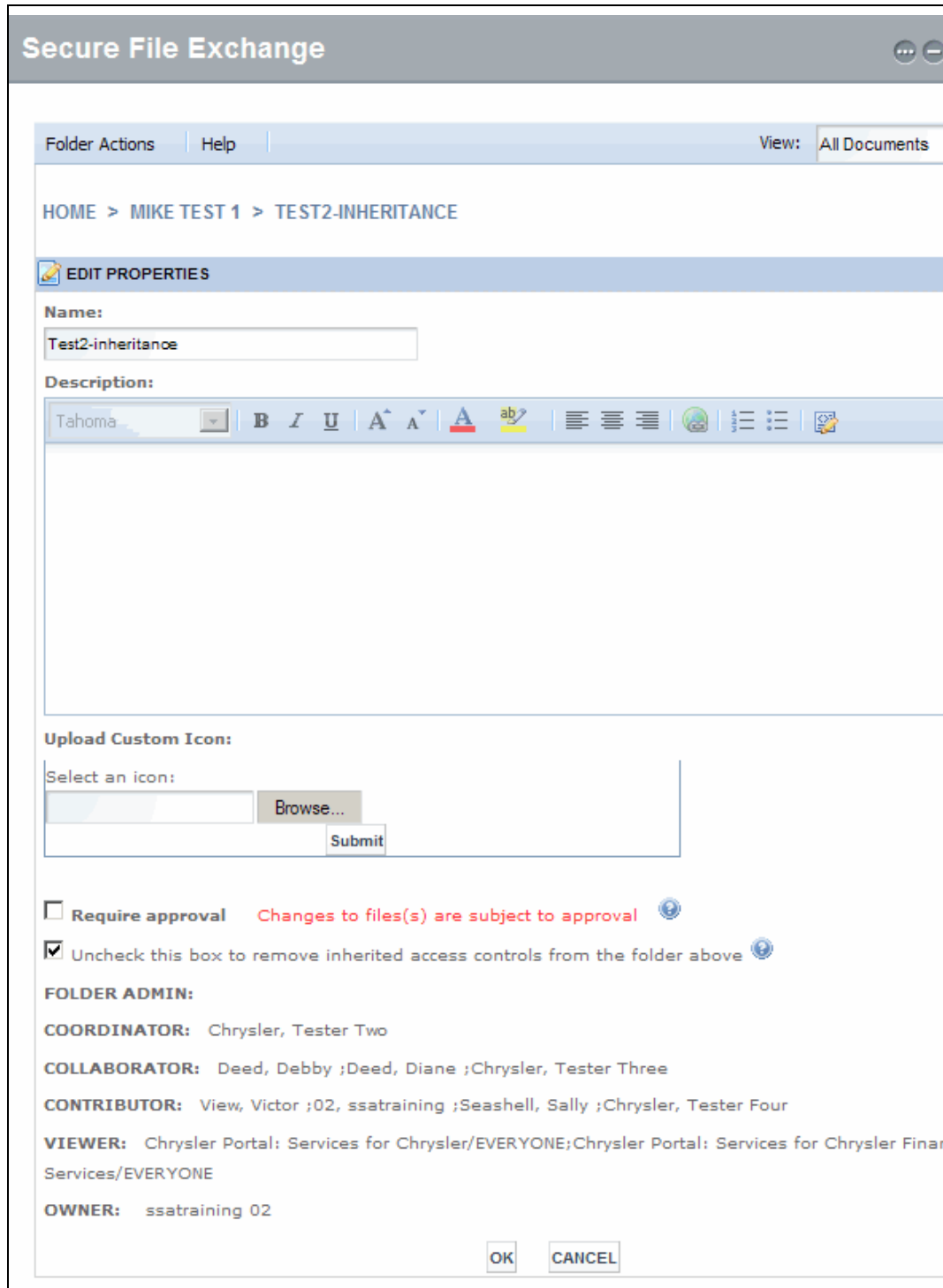
Performing these steps to a folder applies to the folder, and to its subfolders - unless you further modify the subfolders.

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.



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

Upload Custom Icon:
Select an icon:
Browse... Submit

Require approval Changes to file(s) are subject to approval

Check this box to inherit access controls from the folder above

FOLDER ADMIN:

COORDINATOR:
+ Add Members
Tester Two



COLLABORATOR:
+ Add Members
Deed, Debby , Deed, Diane

CONTRIBUTOR:
+ Add Members
View, Victor , 02, ssatraining , Seashell, Sally

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.

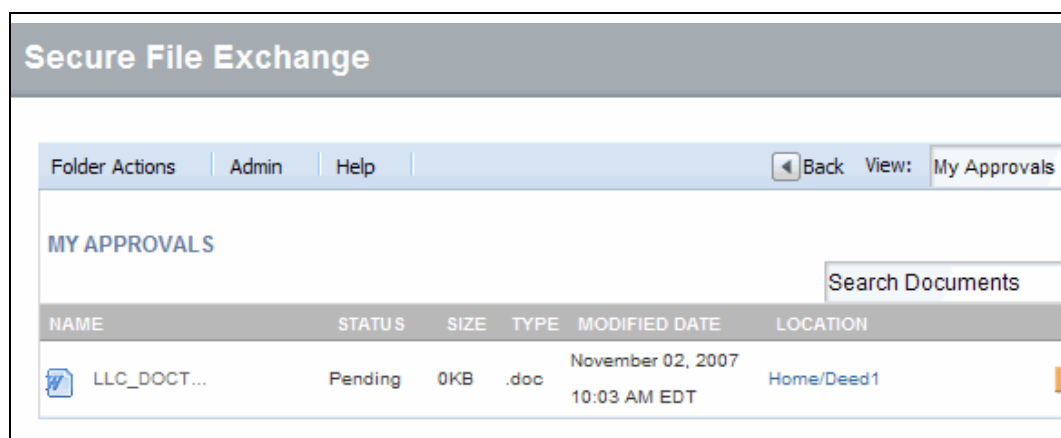
Rejecting a Pending Draft File

his procedure assumes you have reviewed a draft file that is Pending approval, and you are ready to reject it.

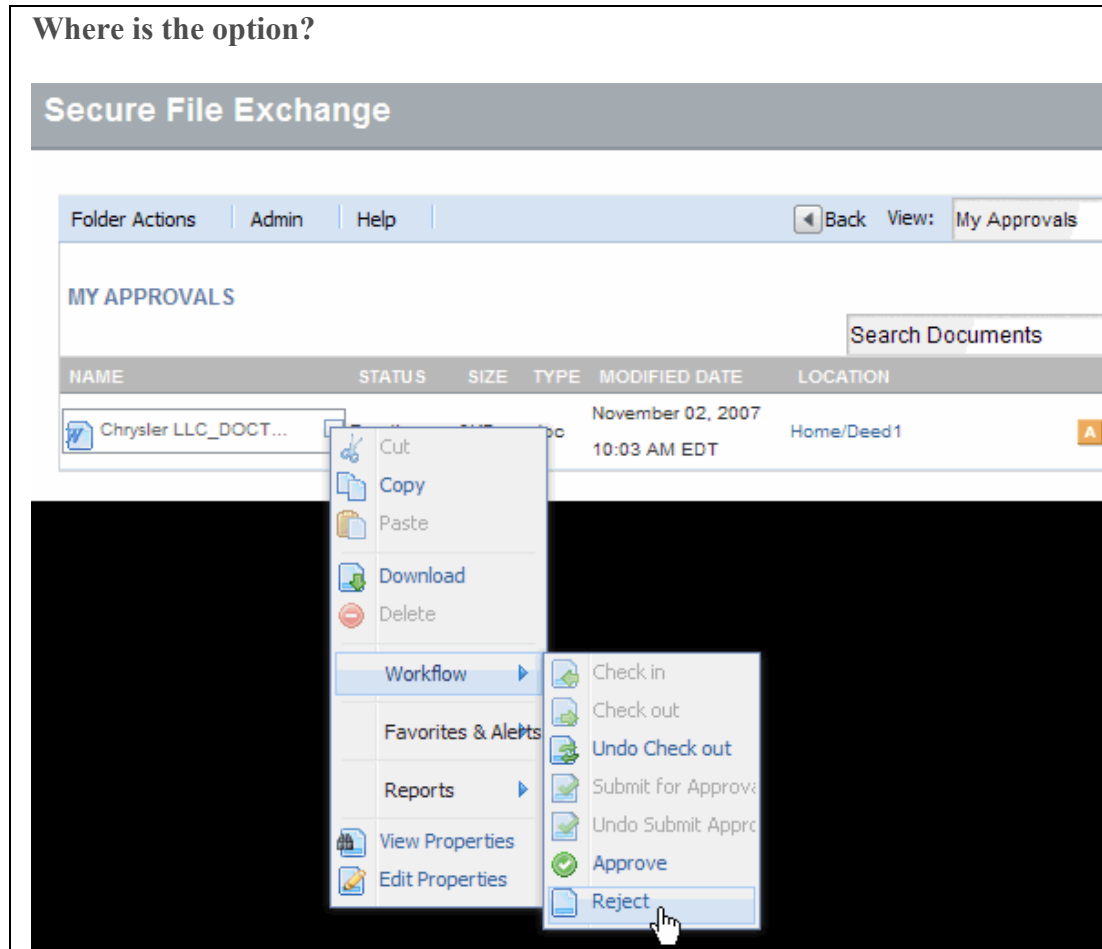
1. Click **My Approvals** from the View drop-down menu. The list of "Pending" files for which you are an approver displays.



2. In the list of Pending files , navigate to the draft file you wish to approve.



3. Click the drop-down arrow at the far right of the file name.



4. From the workflow option, click **Reject**.
5. Optional: Type a rejection reason.
6. Click **OK**. The screen refreshes and the file is rejected.

RESULT:

You have successfully rejected a file.

Removing Approvers from Files or Folders

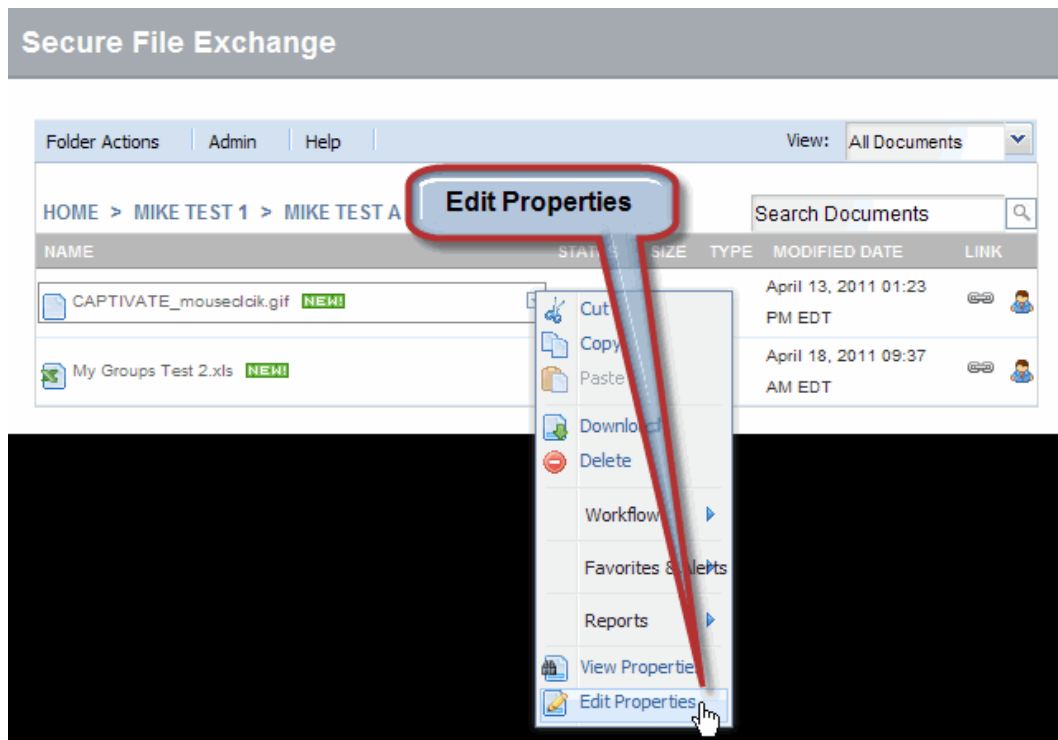
Refer to [Modifying Access Rights](#) to remove Approvers from a File or Folder

Removing Approval Requirement from a Folder or File

If your SFX Administrator configures all items in the repository to require approval, approvers are established at the repository level for all folders and files within the repository. You cannot turn off approval workflow for your items, and you cannot select your own approvers.

When approval is not turned on at the top repository level, it can be required by the folder or file owner or administrator. If you are the owner or administrator, you can remove previously configured approval requirements. Complete the following steps to remove approval requirements on a folder or file.

1. Navigate to the folder or file for which you wish to remove approval requirements.
2. From the item drop down menu, click **Edit Properties**. The Edit Properties window displays.



3. Clear the **Require approval** check box.

Secure File Exchange

Folder Actions Help View: All Documents

HOME > MIKE TEST 1 > TEST2-INHERITANCE > TEST3-INHERITANCE

EDIT PROPERTIES

Name: test3-inheritance

Description: Tahoma

Upload Custom Icons:
Select an icon: Browse... Submit

Require approval Changes to file(s) are subject to approval

Add Approvers

Uncheck this box to remove inherited access controls from the folder above

FOLDER ADMIN:

COORDINATOR: Chrysler, Tester Two

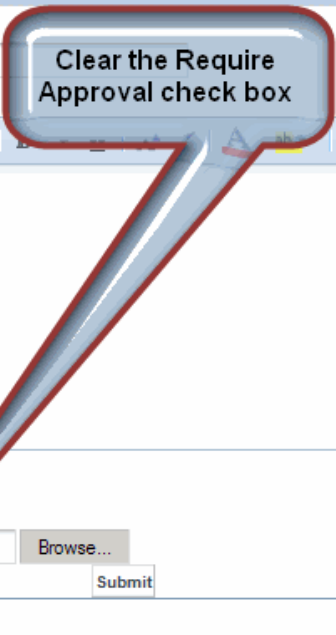
COLLABORATOR: Deed, Diane ;Deed, Debby

CONTRIBUTOR: View, Victor ;02, ssatraining ;Seashell, Sally

VIEWER: Chrysler Portal: Services for Chrysler/EVERYONE;Chrysler Portal: Services for Chrysler Financial Services/EVERYONE

OWNER: ssatraining 02

OK CANCEL



4. Click **OK**. The screen refreshes, and a message confirming the updated properties displays.

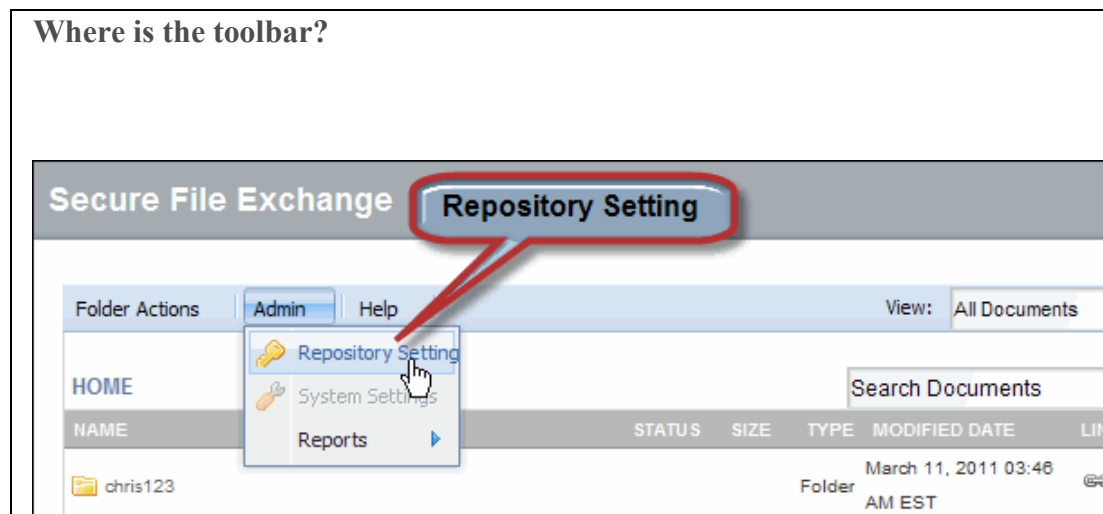
RESULT:


You have successfully removed approval requirements from a folder or file.

Requiring Approval for all Files and Folders in SFX

 This task can only be performed by an SFX Administrator.

1. From the Admin menu, click **Repository Settings**. The Edit Properties window displays.



2. Select the **Require approval** check box. The Add Approvers option displays.
3. Click  next to **Add Approvers**. The User Directory window displays.
 - a. Type the name (or partial name) of the users you want to assign as item approvers 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 each user or group you want to designate as an approver. The names display in the Selected People box.
 - e. Click **OK**. The User Directory window closes and the selected approvers display in the Edit Properties window Add Approvers list.
4. Click **OK**. The screen refreshes, and a message confirming the updated properties displays.

RESULT:

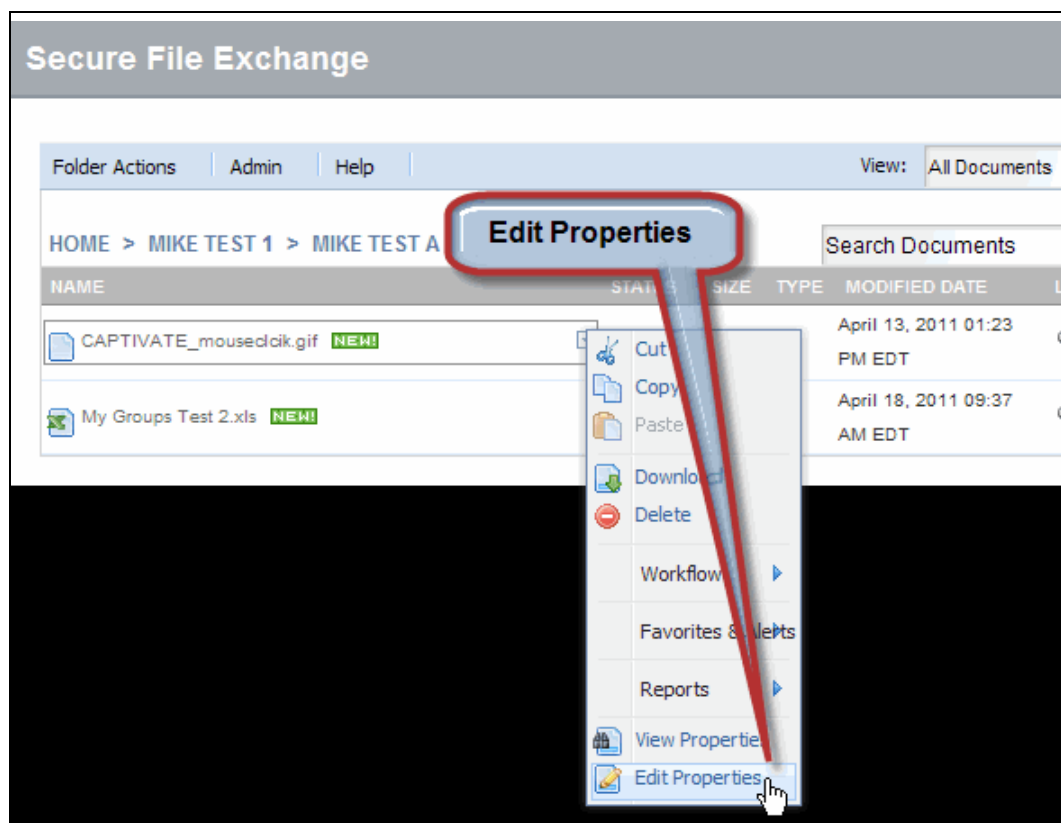
You have successfully added approvers for all files/folders in SFX.

Requiring File Approval

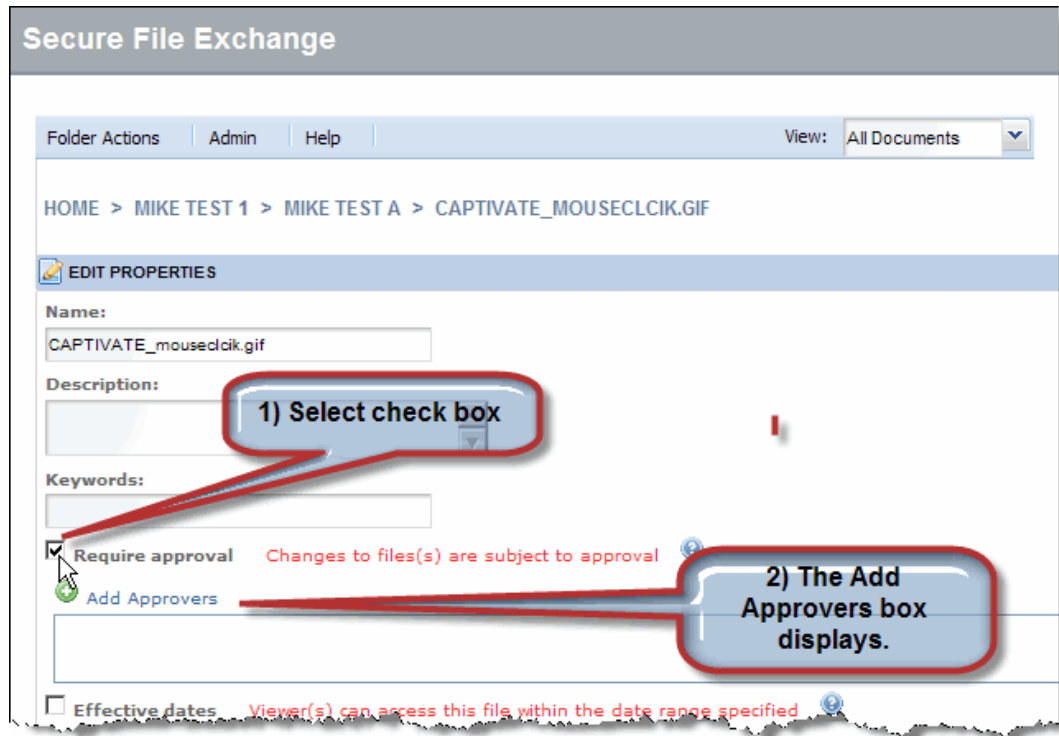
If your SFX Administrator configures all items in the repository to require approval, approvers are established at the repository level for all folders and files within the repository. You cannot turn off approval workflow for your items, and you cannot select your own approvers.


If approval is not required at the top repository level, and is not required at the folder level by the folder owner or an administrator, you can require approval of files for which you are the owner. Complete the following steps to require approval on a file.


1. Navigate to the file for which you wish to require approval.
2. From the file drop down menu, click **Edit Properties**. The Edit Properties window displays.



3. In the Edit Properties window, select the **Require Approval** check box. The Add Approvers option displays.



 If the folder to which a file is uploaded already requires approval workflow, the uploaded file will require approval - it 'inherits' the requirement from the folder. If this is the case, the “Require Approval” check box is grayed out and you cannot change the approval requirement.



4. Click  next to **Add Approvers**. The User Directory window displays.
 - a. Type the name (or partial name) of the users you want to assign as item approvers 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 each user you want to designate as an approver. The users' names display in the Selected People box.
 - e. Click **OK**. The User Directory window closes and the selected approvers display in the Edit Properties window Add Approvers list.
5. Click **OK**. The screen refreshes, and a message confirming the updated properties displays.

Secure File Exchange

Folder Actions | Admin | Help | View: All Documents

"CAPTIVATE_mousedcik.gif" properties have been UPDATED !

HOME > MIKE TEST 1 > MIKE TEST A Search Documents

NAME	STATUS	SIZE	TYPE	MODIFIED DATE
 CAPTIVATE_mousedcik.gif NEW!		43KB	.gif	April 18, 2011 01:05 PM EDT
 My Groups Test 2.xls NEW!		18KB	.xls	April 18, 2011 10:20 AM EDT

RESULT:

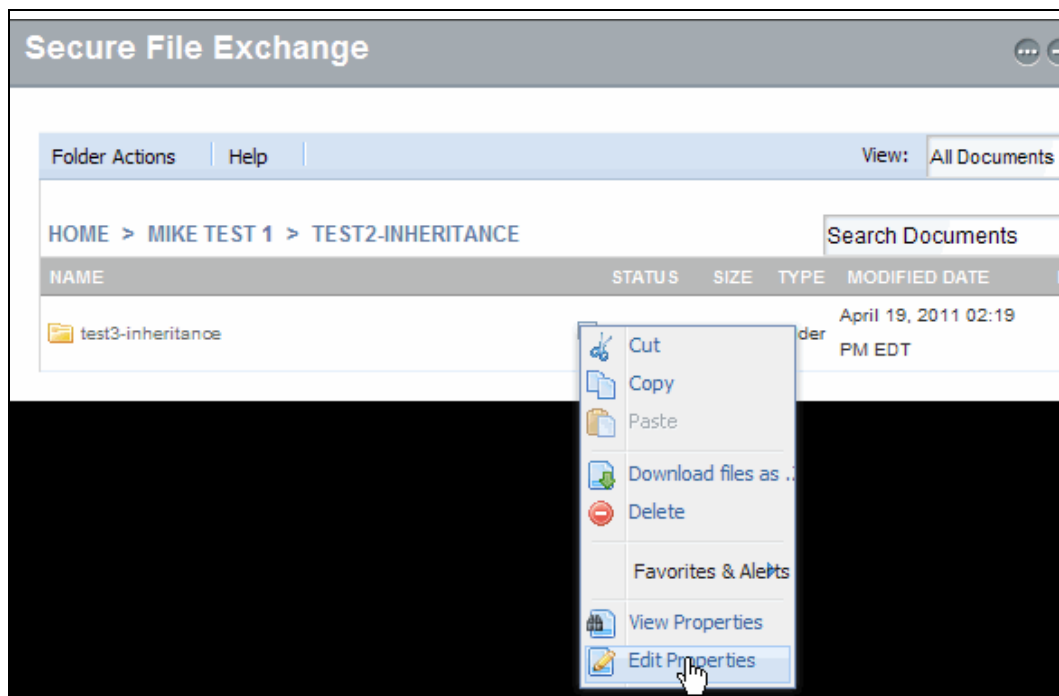
You have successfully required approval on a file.

Requiring Approval on a Folder

If your SFX Administrator configures all items in the repository to require approval, approvers are established at the repository level for all folders and files within the repository. You cannot turn off approval workflow for your items, and you cannot select your own approvers.

If approval is not required at the top repository level, you can require approval on folders for which you are the owner or administrator. Complete the following steps to require approval on a folder.

1. Navigate to the folder for which you want to require approval.
2. From the folder drop down menu, click **Edit Properties**. The Edit Properties window displays.



3. Select the **Require approval** check box. The Add Approvers option displays.

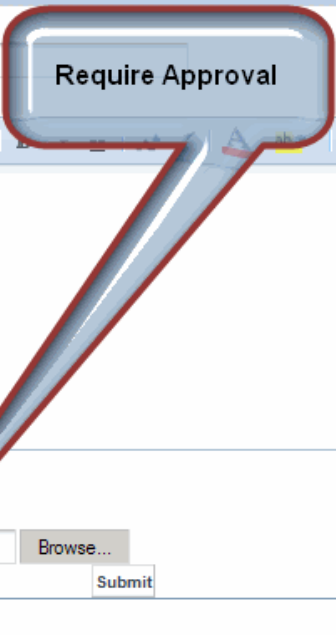
Secure File Exchange ⋮ - + ×

Folder Actions | Help View: All Documents ▾

HOME > MIKE TEST 1 > TEST2-INHERITANCE > TEST3-INHERITANCE

EDIT PROPERTIES

Name: test3-inheritance

Description: 

Tahoma

Upload Custom Icons:
 Select an icon:

Require approval Changes to file(s) are subject to approval ⓘ

Add Approvers

Uncheck this box to remove inherited access controls from the folder above ⓘ

FOLDER ADMIN:


COORDINATOR: Chrysler, Tester Two

COLLABORATOR: Deed, Diane ;Deed, Debby

CONTRIBUTOR: View, Victor ;02, ssatraining ;Seashell, Sally

VIEWER: Chrysler Portal: Services for Chrysler/EVERYONE;Chrysler Portal: Services for Chrysler Financial Services/EVERYONE

OWNER: ssatraining 02

4. Select the **Require approval** check box. The Add Approvers option is enabled.
5. Click  next to **Add Approvers**. The User Directory window displays.
 - a. Type the name (or partial name) of the user or group you want to add as approvers 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 as approvers. The users display in the Selected People box.
 - e. Repeat steps a through d as required until you are finished adding approvers.
 - f. Click **OK**. The User Directory window closes and the approvers display in the Add Approvers field.
6. Click **OK**. The screen refreshes, and a message confirming the updated properties displays.

RESULT:

You have successfully required approval on a folder.

PREMIUM SERVICE: AUTO LOADER FUNCTIONALITY

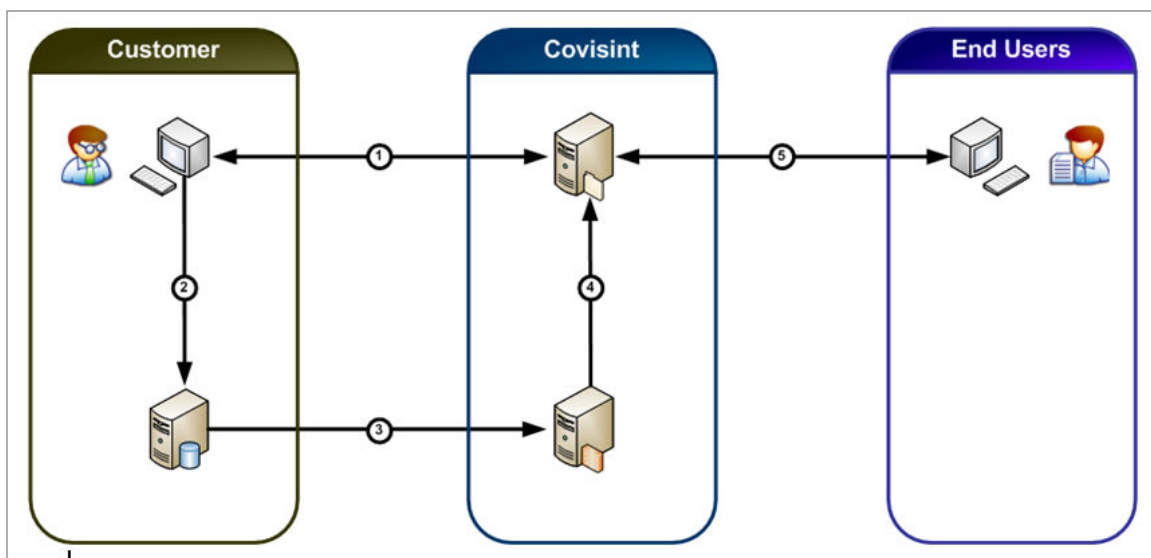
How Does the Auto Loader Functionality Work?

The Auto Loader feature is added SFX functionality that is available for purchase by Covisint SFX customers. Contact your Covisint sales representative for details on purchasing and enabling Auto-Loader for your organization.

The SFX Auto Loader provides a secure HTTPs mailbox to which batch transmissions of files can be sent.

The Auto Loader processes received batch transmissions and parses them into individual document files. The Auto Loader then places the individual files into their proper destination folders so that only the intended recipients may access them.

How are the SFX Auto Loader file operations controlled? Before the Auto Loader is placed into service, SFX administrators pre-configure both the sending (their customer systems) and receiving (their Covisint SFX application) systems. View the sequence of events required to configure and activate SFX Auto Loader.



Sequence of Events

The following checklist provides a high-level overview of the process used to configure and activate the SFX Auto Loader.



TASK

- Your organization's SFX Administrator creates folders and sets access controls to those folders

- Upon completion of folder setup, the SFX Administrator exports a list of folder names and details with the corresponding unique SFX folder paths

- The Administrator then loads this list into their sending system.

- The customer system sends files to Covisint tagged with a unique SFX folder path for each file.





- The Covisint messaging system routes the files into SFX where they are parsed and routed into the appropriate folders.

- SFX end users are able to securely access files.

Setting Up the Receiving System

SFX Administrators must configure their receiving system before they can use Auto Loader. Before Administrators configure their receiving system, they must create folders and establish folder access rights.

The following checklist provides a high-level overview of the process used to set up the receiving system.

	TASK	ADDITIONAL DETAILS
	Configuring the mailbox	(Covisint task) Auto Loader functionality requires the assignment of a secure (HTTPs) mailbox to an SFX instance. A Covisint Administrator will configure and assign the mailbox, at the customer's request. Covisint will provide the customer with the information necessary to transmit files. Customers will transmit files into their HTTPs mailbox for Auto Loader processing.
	Creating destination folders	(SFX Administrator task) Customers' SFX administrators manually pre-create their folder structures in SFX before sending XML batch transmissions to Covisint (see create folders and administer access in SFX). Upon creation customers can access folder details by generating a Folder Details report.
	Processing files	<p>(System task) When customers send batch transmissions of tagged files into their HTTPs mailbox, Auto Loader processes them as follows:</p> <ul style="list-style-type: none"> • The system polls the mailbox every 15 minutes. • When the system detects new transmissions, it parses them into individual files, and writes each file into the correct folder. • If a new file (in a given folder) has the same name as an existing file, the existing file is overwritten. <p>Note: SFX versions all files, so users can browse and restore an overwritten file.</p> <ul style="list-style-type: none"> • If the sender transmits files tagged with a folder name or path that does NOT exist in SFX, the folder is created and the files are loaded into the newly created folder. Automatic folder creation is denoted with a message of "Auto Created Folder"

- in the Status column of the File Processing Report.
- The maximum file size of any given batch transmission is 10MB.
- The system supports the distribution of a single file into multiple folders, if it is tagged appropriately.

**Reviewing the file processing reports**

(SFX Administrator task) For each transmission and file processing event, SFX creates a File Processing Report. The reports are available to SFX Administrators to allow for rapid visibility into Auto-Loader processing. They allow administrators to validate, troubleshoot, and audit file processing. The reports include:

- Date and time of transmission
- File name
- File path
- Transmission status (success/failure)
- Error messages (when applicable)

**Performing error handling**

(System task) In the event of a transmission or file processing error, SFX:

- Logs the processing errors that occurred during file processing.
- Allows administrators to activate or deactivate email notifications through the SFX user interface.

**Delivering files to end users**


(System task) When users access the SFX application they can view and download Auto Loaded files provided they have been granted access by their SFX administrator. SFX allows users to activate or deactivate email notification on a file or folder. When notification is enabled, SFX sends users email notifying them of new or updated files.

Setting Up the Sending System

SFX Administrators must configure their sending system before they can use Auto Loader. Administrators configure their sending systems to tag each file with the SFX destination folder path. SFX Administrators access the information required to tag their files by generating and exporting a Folder Details report in SFX.

Before Administrators configure their receiving system, they must create folders and establish folder access rights.

The following checklist provides a high-level overview of the process used to set up the sending system.

	TASK	ADDITIONAL DETAILS
<input type="checkbox"/>	Generating the Folder Details report	<p>(SFX Administrator task) Exporting the results of the Folder Details report provides customers with the information they need to tag files prior to transmission to Covisint. A customer SFX Administrator can access SFX and then generate a Folder Details report. The report includes:</p> <ul style="list-style-type: none"> • Folder name • Folder description • Folder keywords* • Folder permissions (e.g. names of collaborators, viewers, etc.)* • Approval workflow status (e.g. enabled/disabled) • Approver names • Folder path
*To be implemented in a future release		
<input type="checkbox"/>	Exporting reports	(SFX Administrator task) After generating Folder Details reports, SFX Administrators can export them to their PCs in CSV (Comma-Separated Values) format.
<input type="checkbox"/>	Configuring sending systems	(Perform this task in 'other' systems that will send files to Covisint) Customers use the data obtained in the Folder Details report to configure their other systems to produce

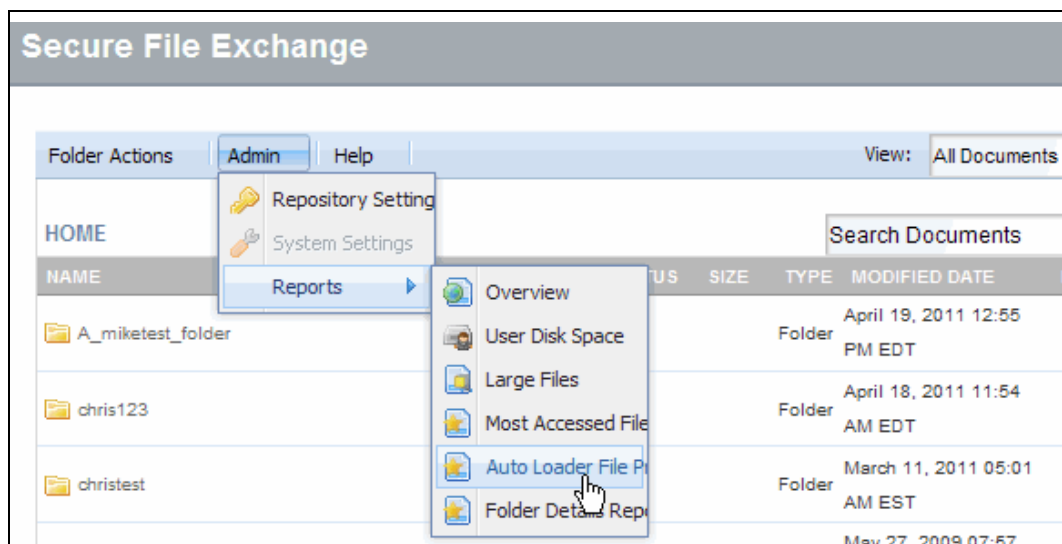
files tagged with the SFX destination folder path for proper routing and delivery. Customers are responsible for ensuring the appropriate identifier (path) tags are applied to each file submitted.

<input type="checkbox"/>	Validating the Covisint standard file format	(Perform this task in 'other' systems that will send files to Covisint) Customer systems must send batch file transmissions in the Covisint standard XML format. Details are provided by the Covisint Administrator assigned to your project.
<input type="checkbox"/>	Transmitting files	(Perform this task in 'other' systems that will send files to Covisint) Clients can use automated or manual means to transmit files to Covisint via HTTPs.

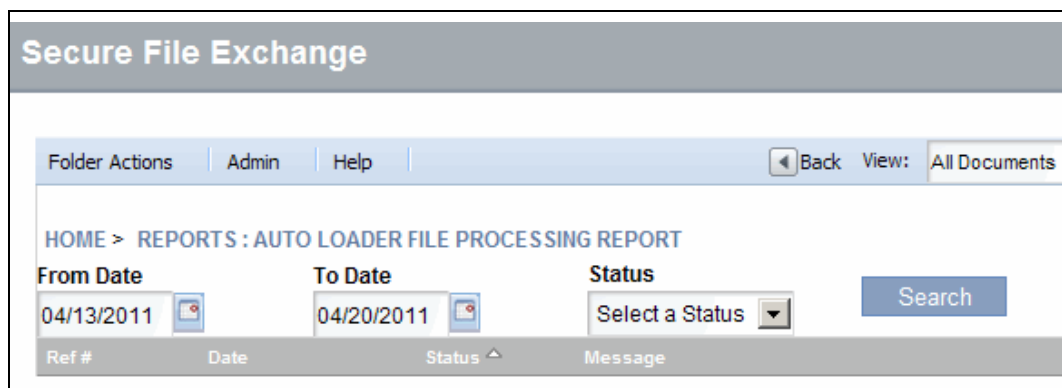
Generating a File Processing Report

 This task can only be performed by an SFX Administrator, and only if your organization has purchased Auto-Loader functionality.

1. Click the Admin menu and select Reports -> Auto Loader File Processing. The report processing window displays.



2. In the report processing window, configure the report you want to generate by selecting options as required.



- a. Modify the *From Date*
- b. Modify the *To Date*

- c. Select a Status

Status values are:

Success - all files transmitted successfully to the specified SFX folders.

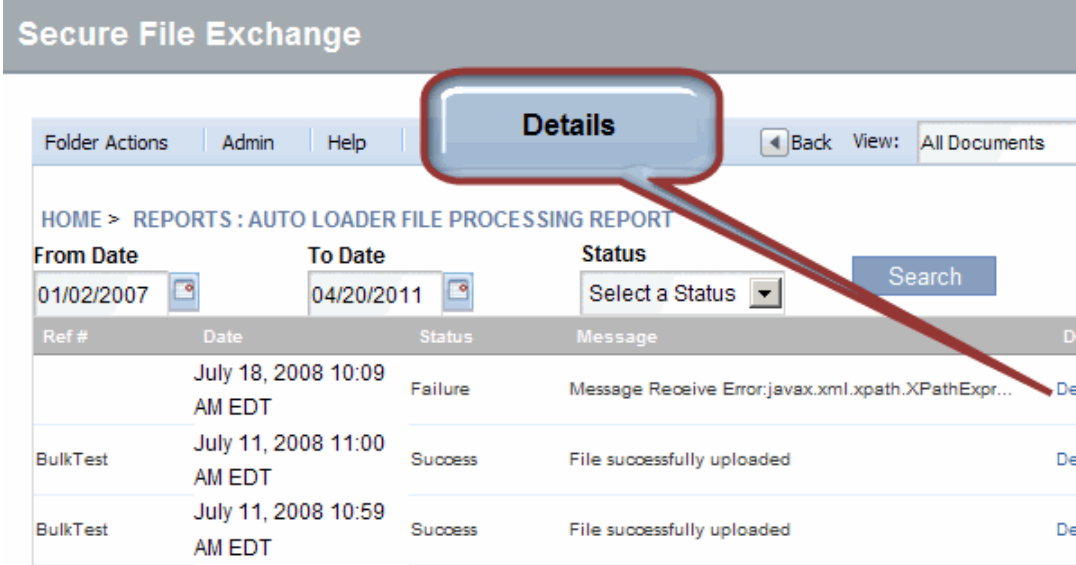
Partial Success - all files transmitted successfully to SFX. However, some specified folders could not be located, so SFX auto-created folders in which to place the transmitted files.

Failure - the transmission to SFX failed entirely.

 If you do not modify the default selections for the options, the report will include files of all statuses processed within the displayed date range.

3. Click **Search**.
4. Click Details from the File Processing report. The report details display.

Where is the Details link?



Secure File Exchange

Folder Actions | Admin | Help | **Details** | Back | View: All Documents

HOME > REPORTS : AUTO LOADER FILE PROCESSING REPORT

From Date: 01/02/2007 | To Date: 04/20/2011 | Status: Select a Status | Search

Ref #	Date	Status	Message	De
	July 18, 2008 10:09 AM EDT	Failure	Message Receive Error:javax.xml.xpath.XPathExpr...	De
BulkTest	July 11, 2008 11:00 AM EDT	Success	File successfully uploaded	De
BulkTest	July 11, 2008 10:59 AM EDT	Success	File successfully uploaded	De



5. View report details as required. Click **Back** to return to the list and view another report.

Secure File Exchange

Folder Actions | Admin | Help | [Back](#) View: All Documents

HOME > REPORTS : FILE PROCESSING DETAILS

Process Date: July 11, 2008 11:00 AM EDT
Message: File successfully uploaded
Reference Number: BulkTest
Status: Success

Name	Status	Message	Location
 Duplicate1.doc	Success	File Added	/AutoLoadTest
 Duplicate2.doc	Success	File Added	/AutoLoadTest

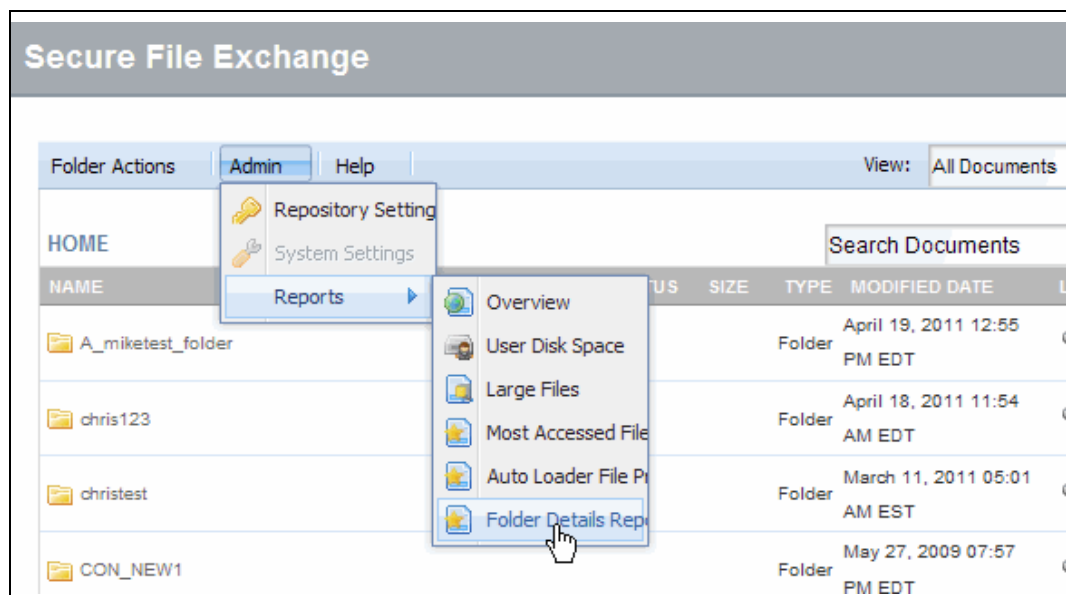
RESULT:

You have successfully generated File Processing Report.

Generating a Folder Details Report

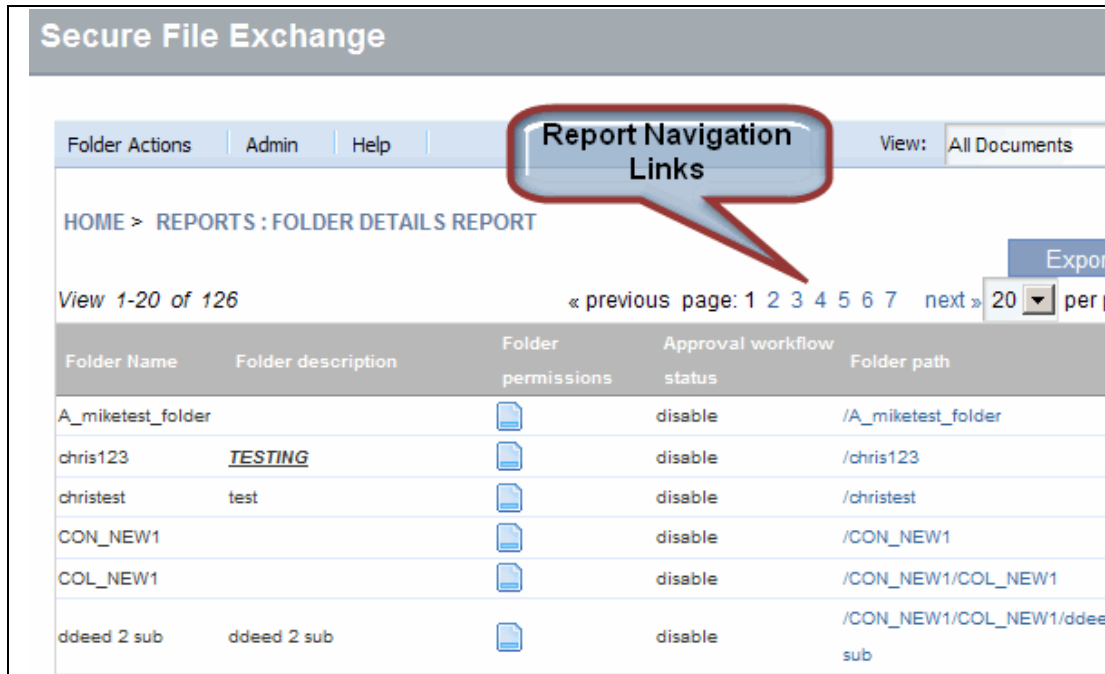
 This task can only be performed by an SFX Administrator, and only if your organization has purchased Auto-Loader functionality.

1. Click the Admin menu and select Reports -> Folder Details Report. The folder details report window displays.

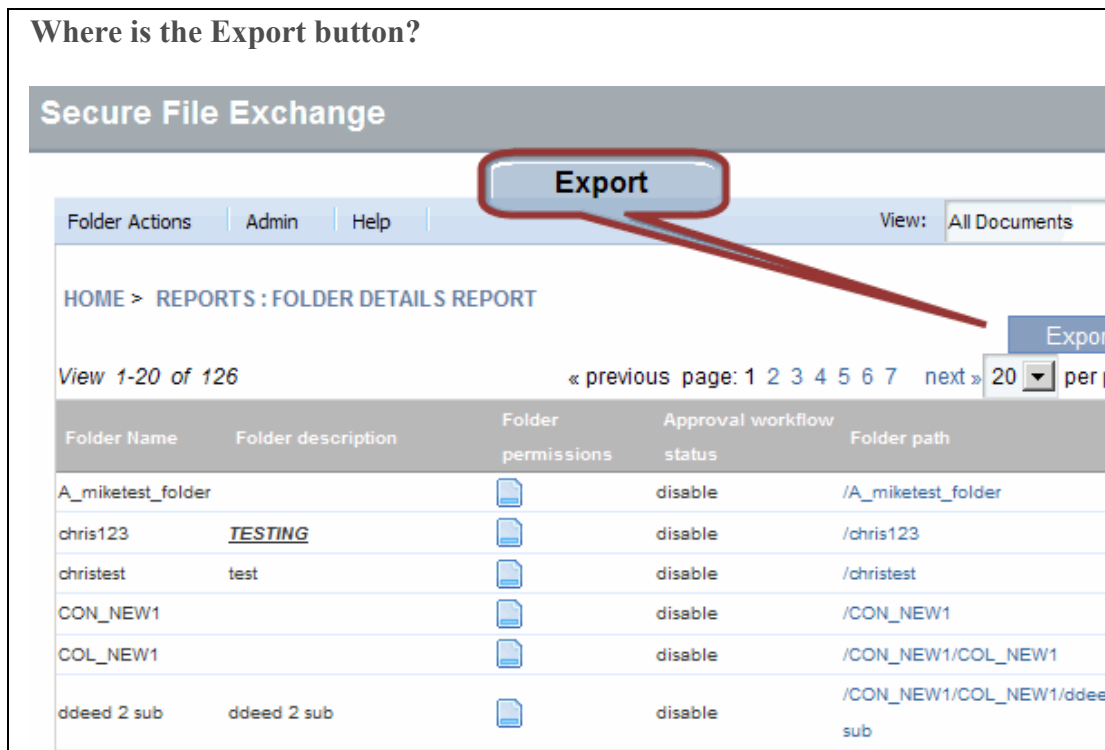


2. View the Folder Details Report as required.





- a. View details of any folder in the repository.
- b. Hover over the Folder Permissions column to view user access details.
3. Click Export if you want to export the report in a CSV format file. A file download dialog displays.



4. Click **Save** and follow your PC prompts to save the CSV file.

RESULT:

You have successfully generated a Folder Details Report.
