

# User Quick Start Guide

## Login

After the site administrator creates your account, you will receive an email with your username and temporary password. Go to the web address indicated in the email and log in with your username and temporary password. You will then see a screen that will allow you to create your own password (consistent with the password requirements of the site).

## Workspaces

The workspaces you belong to will appear in the **Your Workspaces** area on the left side of your screen. To change the Workspace you're in, simply click the name of another workspace. If you belong to more than 15 workspaces, you can click **View Options** to choose different ways to view those workspaces. Clicking **More** will show additional workspaces not currently shown.

## Navigation

Location: [Administration](#) > [Regulations-Admin](#) > [Current\\_Regulations](#)

- To navigate into folders, simply click the folder name.
- To navigate back up, click on the appropriate folder name in the **Location** path or click **Parent Folder**.

## Create Folders\*

Click the Create Folder button and type in the name for your folder (using letters, numbers and underscores only).

+ Create Folder

## Upload/Send Files\*

↑ Upload/Send Files

You can upload individual files or, using Batch Upload, multiple files and/or folders at once. **CAUTION:** Don't close or quit your browser window during transfer or your upload will be canceled.

### Individual Files

- First, navigate to the folder you wish to upload the file(s) to and then click the **Upload/Send Files** button.
- Click the **Individual Files** tab.
- Click the **Choose File** button and select the file you wish to upload. Click **Choose File** again to choose additional files.
- If you wish to add a **comment** or a **file ID**, choose one of the **Upload Preferences**, or **add a recipient**, click the appropriate boxes or links.
- When ready, click **Upload Files** (or Cancel).

### Multiple Files/Folders

- Create a ZIP archive of the files and/or folders you wish to upload. If you need help creating a ZIP archive, click **Need help creating a ZIP file?** found under the Batch Files tab.
- First, navigate to the folder you wish to upload files to and then click the **Upload/Send Files** button.
- Click the **Batch Files** tab.
- Click the Choose File button and select the ZIP archive you wish to upload.
- If you wish to add a **comment** or a **file ID** or add recipients, click the appropriate links.
- When ready, click **Upload and Extract Zip** (or **Cancel**).

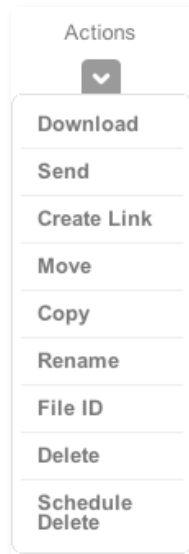
\*If you've been granted these permissions by the Administrator.

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## Actions Menu

First click the arrow next to the file or folder name under the Actions column.

- To Download a file, click the **Download\*** icon (you can also simply click the file name itself).
- To send a file to someone, click the **Send\*** icon and enter the person's email or select their name from the list.
- Click **Move\*** or **Copy\*** and then choose a destination for the file to be moved or copied to.
  - **Rename\*** allows you change the file name.
  - To delete a file, click **Delete\***.

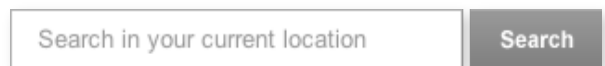


## Scheduled Delete

Scheduled Delete is available to users with the Delete permission.

To schedule a file or folder to automatically delete, roll over the **Actions** menu to the right of the file/folder name and choose **Schedule Delete**. A shadowbox window will appear allowing you to choose the number of days until the file/folder deletes (with minimum and maximum days appearing below the box). Selecting more than one file and/or folder will enable the **Batch Schedule Delete** at the top of the file listing so you can set deletes for multiple files or folders at once.

Under the file icon in the file listing, a white clock icon indicates the file will delete within 30 days. A yellow clock icon indicates the file will delete within 4 days. Rolling over the icon will display the date and time of deletion.



## Search

To search for a particular file (or set of files) within your current window, enter your search term in the field to the left of **Search** and click the Search button. The results will appear in the file listing below. Click **Clear Results** in the yellow box to show all files again.

## Advanced Search

[Advanced Search](#) ▾

To search for files or folders within all of the workspaces you belong to, click the Advanced Search button, which will open a window below the button to allow you to search by several different criteria. Enter your search term(s) and click blue Search button at the bottom of the window. The results will appear in the file listing below. Click **Clear Results** in the yellow box to show all files again or Modify Results to change the search terms.

## Help/Logout

[Help](#) | [Logout](#)

If you require additional help in using the FileTransfers.net site, click the **Help** link. There you can get contact information for asking questions or requesting more help.

When finished using the system, always click the **Logout** button to prevent anyone else from accessing your site from your computer without your knowledge.

\*If you've been granted these permissions by the Administrator.

# Admin Quick Start Guide

## Login

After signing up, you will receive an email with your username and temporary password. Go to the web address indicated in the email and log in with your username and temporary password. You will then see a screen that will allow you to create your own password.

The following items are only available to Admins:

## Manage Workspaces Tab

### Add Workspace

The first thing you should do is create a workspace (you will need to do this before adding any user who isn't an administrator). Click **Add Workspace**, enter a name, and click **Add Workspace** at the bottom.

If creating a workspace after users have been set up, you can add any existing users to the new workspace under the Users area of the Add Workspace window.

## Manage Users Tab

### Add User

To add a user, click the **Add User** button and fill in the required info.

Under "Settings", assign the user the specific permissions you wish them to have, including if you want them to receive upload or download notifications.

Under "Add Workspaces" click **View all workspaces this user can join** and select the workspaces desired, or simply start typing the workspace name into the field provided. You can also create a workspace by entering a name in the appropriate field.

Under "Activation", uncheck **Activate this user** if you don't want this user to be sent their login information yet. When activated later, the user will receive their username and password.

Then click **Add User** (or Cancel).

## User Filters

The Users list can be filtered to make it easier to find certain users or sets of users. Selecting **All Active Users** under User Filters (at the top of the left column) will display all users who are currently Active. Selecting **All Inactive Users** will display those users who are currently inactive (cannot log in). Selecting **Admins** will display only site admins.

Selecting a workspace name from the drop-down menu under **By Workspace** will display those users currently assigned to that workspace, including Admins who have access to all workspaces.

## User Groups

User Groups can be added to workspaces, allowing all members of that user group to have access to the workspace, rather than adding the members individually. Inversely, a user group can be removed from a workspace, thus removing access to that workspace for all members of the group.

To add a user group, click **+Add Group** next to "Filter by User Group". Add a name for the user group and click the users you wish to be members of that group. Click the name again to deselect.

To modify which users belong to a user group, click **Add or Remove Users** underneath the user group name. Users already in the group appear in yellow. Click to select or deselect names.

To delete a user group, simply click **Delete** below the name. No users will be deleted.

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## Control Panel

### Branding the Site

To add your company's logo to the site, first go to the Control Panel and click **General Site** under Settings in the left menu.

Ensure your logo is the proper size and format as listed below "Add Logo".

Click the **Browse** button and select your logo.

Then click **Update Settings** (or Cancel).

### Site Disclaimer

Any text added in this field will appear at the bottom of every page on your site.

### FileDrop

The FileDrop allows non-users to upload files to your site. To enable, click "FileDrop" under Settings in the left menu.

Click **Enable** under "Enable FileDrop".

If you wish to include any instructions for your FileDrop users, enter it in the field under "Add FileDrop instructions".

Users added under FileDrop Recipients will appear in a list in the FileDrop window. A user uploading a file through the FileDrop will be able to select one or more users from this list to receive an upload notification about the file(s) being uploaded.

## Help/Logout

If you require additional help in using your FileTransfers.net site, click the **Help** link. There you can find additional guides and get contact information for asking questions or requesting more help.

When finished using the system, always click the **Logout** button to prevent anyone else from accessing your site from your computer without your knowledge.

## Auto Delete

Navigate to the Control Panel --> Settings --> FileManagement

### Sitewide Auto Delete

Under "Delete Old Files Sitewide" click the radio button next to **Automatically delete all files older than** and enter a number of days (from 1 to 999) in the box then click **Update Settings** at the bottom of the page. Now, all files currently on the site and all future files added to the site will delete after they have been on the site the specified number of days specified in the box (unless overridden by a workspace or file/folder setting).

### Workspace Auto Delete

Workspaces can have a Auto Delete setting independent of (and which overrides) the Sitewide setting. It is not necessary to enable sitewide delete in order to designate workspaces for auto file deletes. On the File Management page under "Delete Old Files Per Workspace", select a workspace name from the "Select a workspace" drop-down menu and then enter the number of days in the box to the right. Entering the number "0" (zero) will set the files in that workspace to never delete (unless specific files or folders within that workspace are scheduled for delete). You can then add additional workspaces by selecting another from the drop-down menu or remove existing settings by clicking **Remove** to the right of the box. When finished, make sure to click **Update Settings** to commit to the changes.

## Scheduled Delete

For information on Scheduled Delete, please see the User Quick Start Guide.