

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)

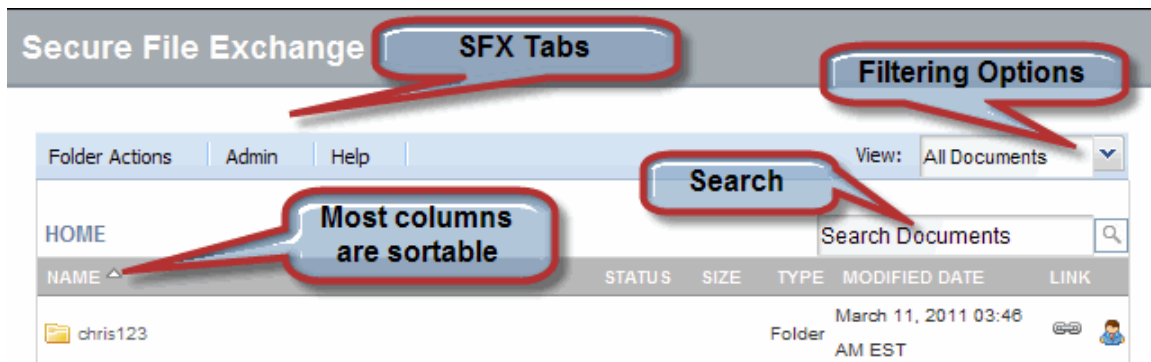
(This is not a comprehensive list of everything you can do... just a list to help get you started with Secured File Exchange)

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.

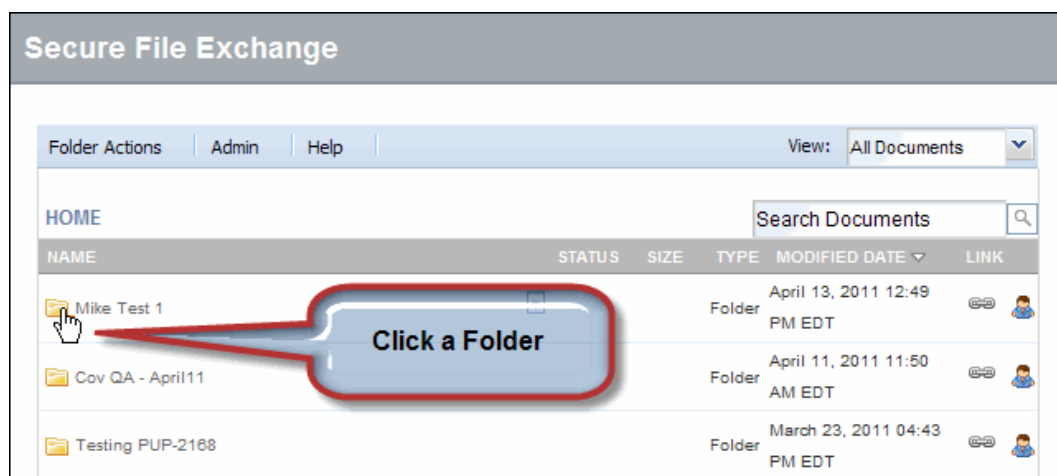
The following screen shot illustrates common SFX window elements.



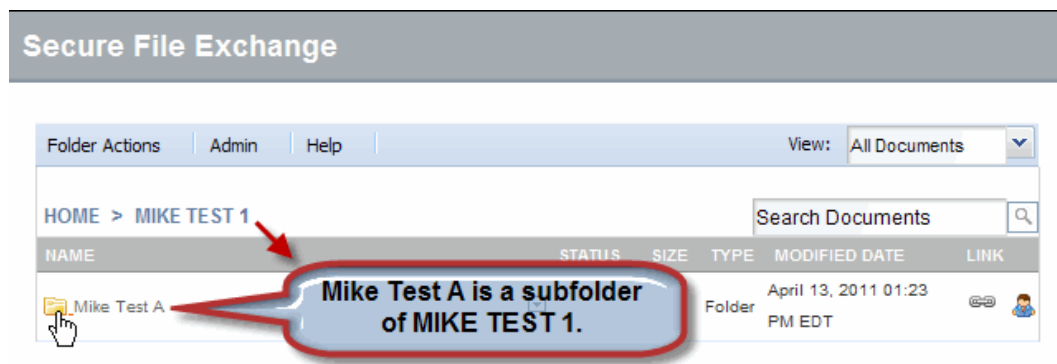
Navigate to a file by searching for it, or by drilling down into the folder structure.

To drill down into the folder structure:

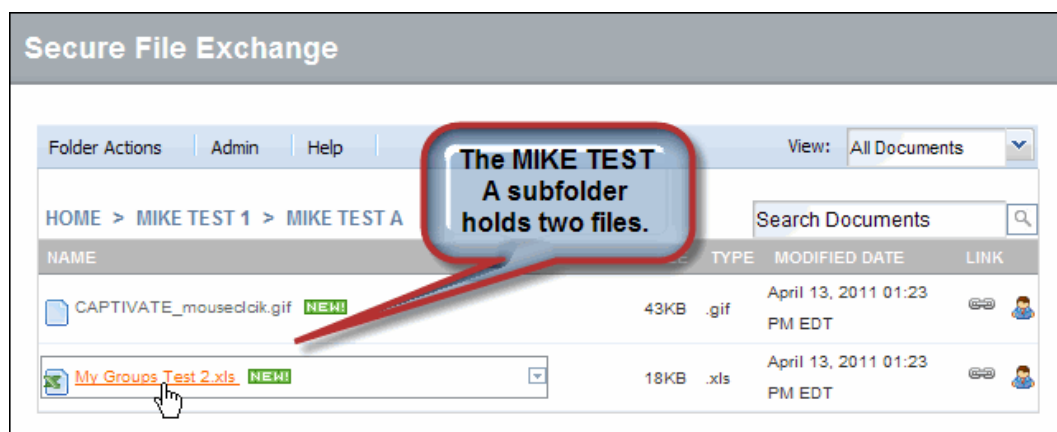
1. Click a folder from the Home Page. The folder contents display.



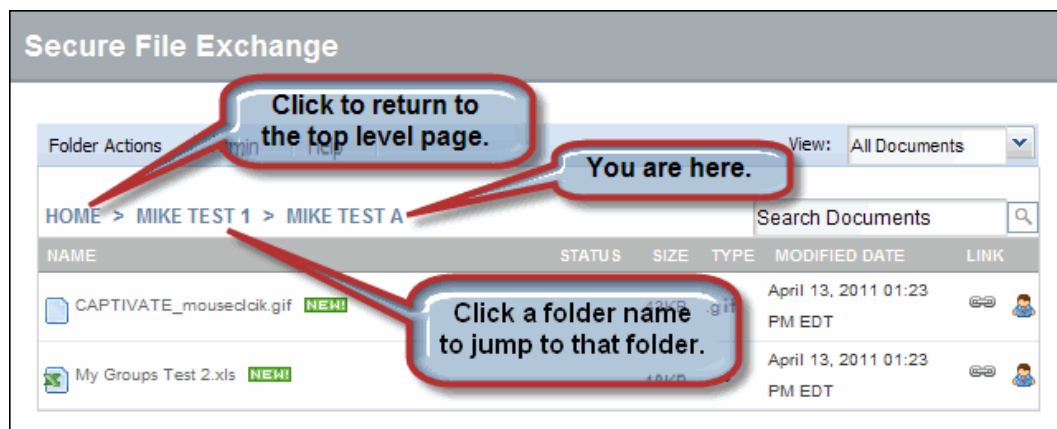
2. Select subfolders as required.



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.

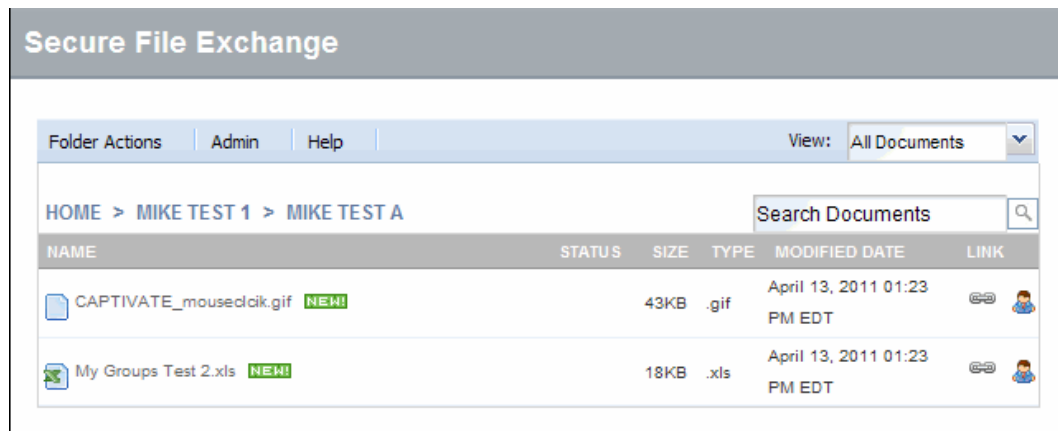


WHERE ARE THE MENU OPTIONS?

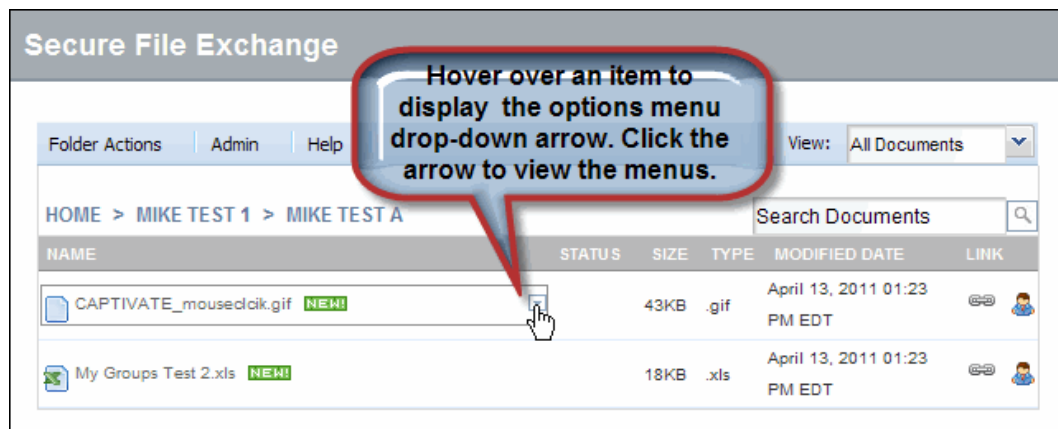
Most menu options are displayed by clicking the drop-down arrow located at the far right of the item.

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

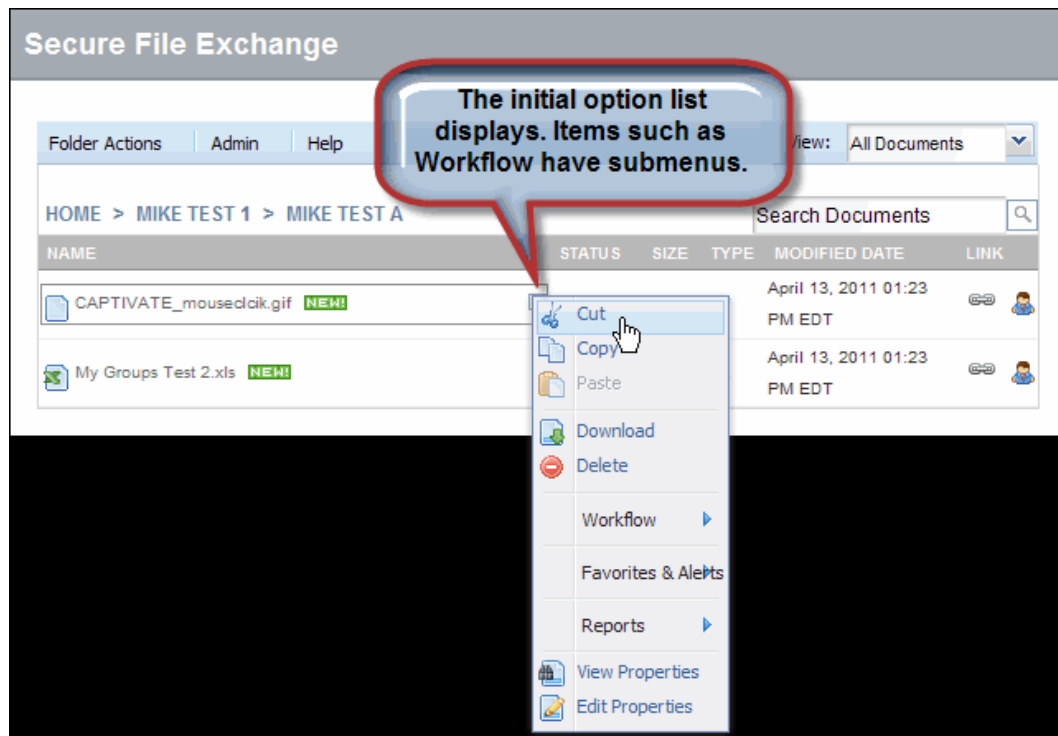
- An item's menu options are not always visible.



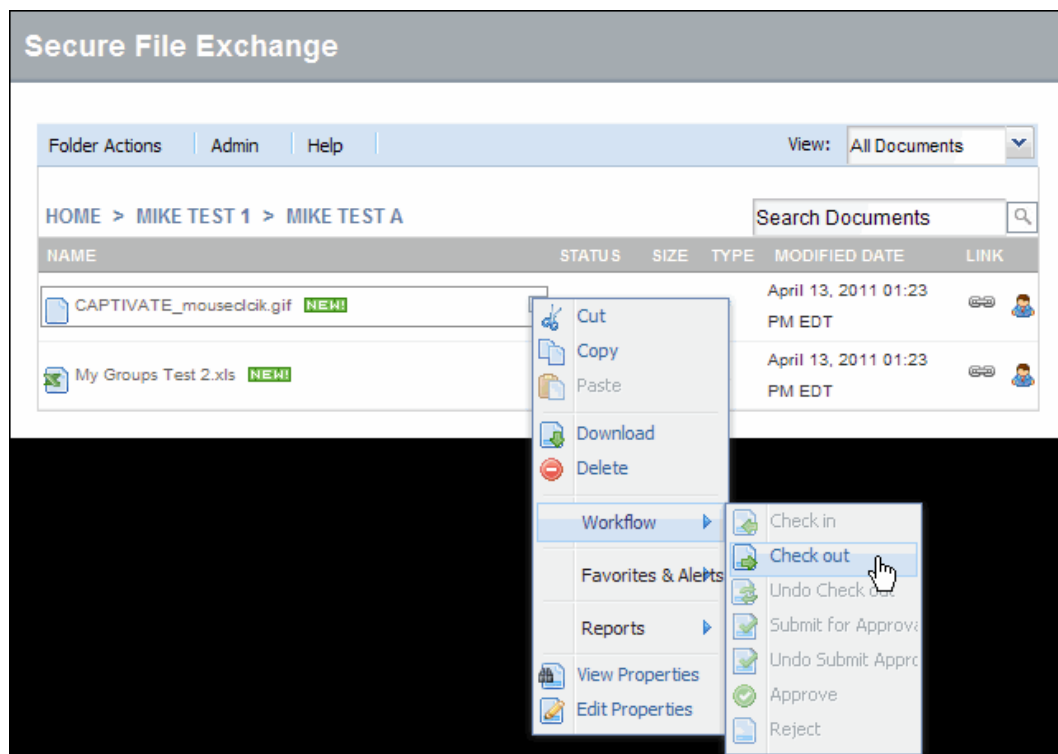
- When you hover the cursor over an item, its menu selection drop-down arrow displays.



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



- Some menu options have submenus.



USER ROLES

Assigning Users to Roles in SFX Repository

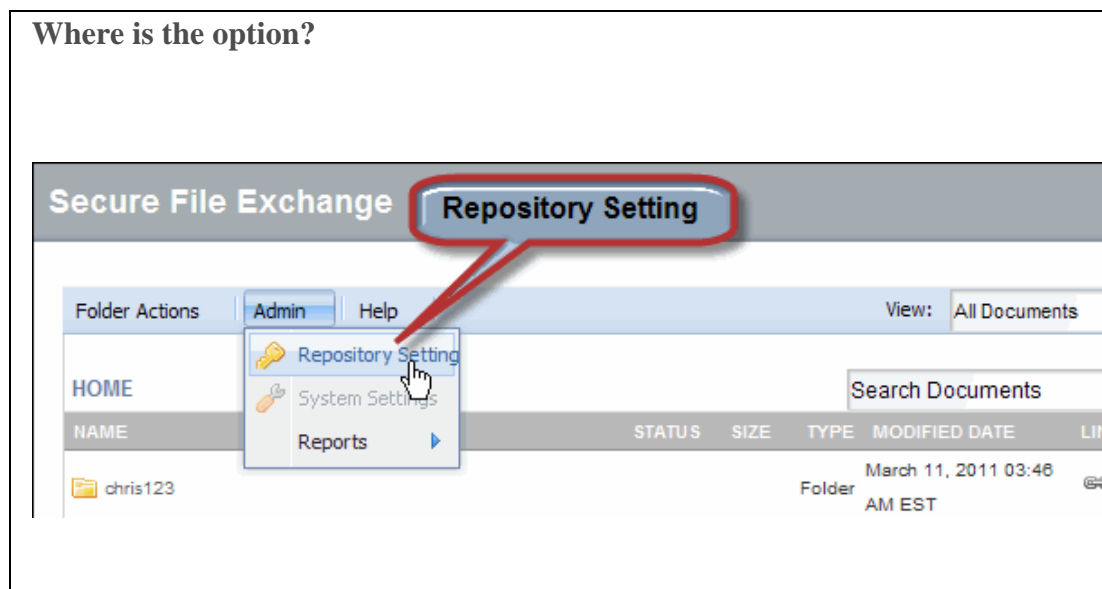



This task can only be performed by an SFX Administrator.

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**.

Where is the option?



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

Secure File Exchange

Folder Actions | Admin | Help | View: All Documents

HOME

REPOSITORY CONFIGURATION SETTINGS

Access Level

A ADMIN:

+ Add Members **Add ADMIN Members**

Financial

CO COORDINATOR:

+ Add Members **Add COORDINATOR Members**

Tester Two

CL COLLABORATOR:

+ Add Members **Add COLLABORATOR Members**

Tester Three

CT CONTRIBUTOR:

+ Add Members **Add CONTRIBUTOR Members**

Tester Four

V VIEWER:

+ Add Members **Add VIEWER Members**

Services for EVERYONE

☐ Require approval

☒ Follow file retention policy

Duration (in days) : 1

☐ Enforce expiry within retention

OK CANCEL

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

The screenshot shows a 'User Directory' window with a search bar containing 'test'. The 'Include' dropdown is set to 'Users'. A table lists search results with columns for Name, Type, and Organization. Below the table, the 'Selected People' section shows 'Tester Four' and 'Tester Three' selected. At the bottom are 'Ok' and 'Cancel' buttons.

Name	Type	Organization
<input checked="" type="checkbox"/> Tester Four	User	
<input type="checkbox"/> Tester One	User	
<input checked="" type="checkbox"/> Tester Three	User	
<input type="checkbox"/> Tester Two	User	
<input type="checkbox"/> Tester, QA	User	

Selected People

☒ Tester Four ☒ Tester Three

Ok Cancel

- 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

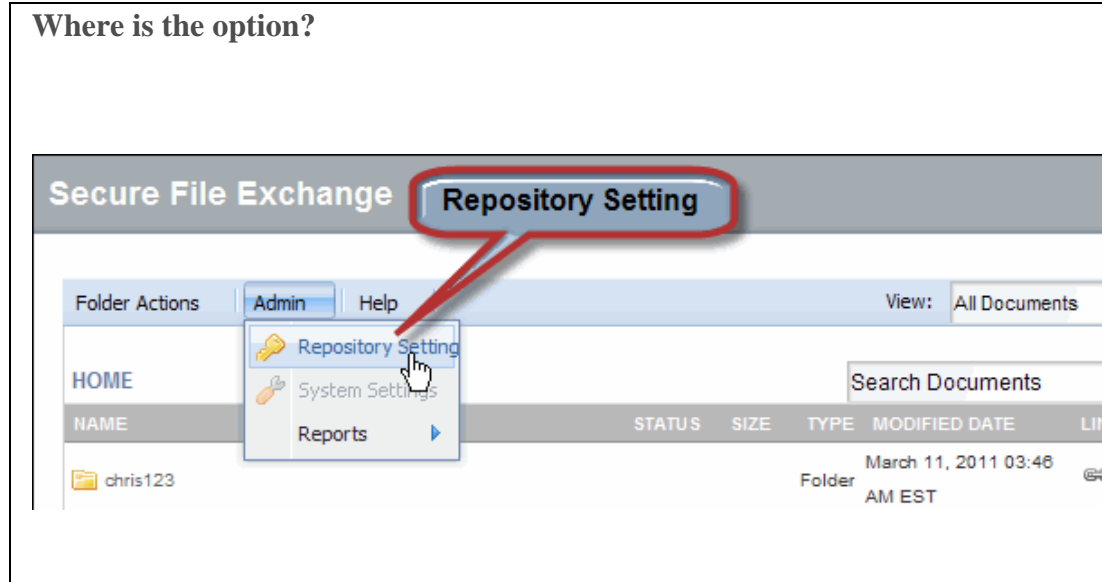



This task can only be performed by an SFX Administrator.

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.

Secure File Exchange

Folder Actions | Admin | Help | View: All Documents

HOME

REPOSITORY CONFIGURATION SETTINGS

Access Level

A ADMIN:

+ Add Members

☐ Johnson, Erik
☐ Financial, Fran
☐ Chrysler, Tester One
☐ Clar

CO COORDINATOR:

+ Add Members

☐ Tester Two

CL COLLABORATOR:

+ Add Members

☐ Dee
☐ Tester Three

CT CONTRIBUTOR:

+ Add Members

☐ Vie
☐ Tester Four

V VIEWER:

+ Add Members

☐ Portal: Services for EVERYONE
☐ Chrysler Portal: Services for Chrysler Financial Services/EVERYONE

☐ Require approval
☒ Follow file retention policy
 Duration (in days) :
 1
☐ Enforce expiry within retention

OK CANCEL

Click to delete

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)					

ACTION:	Viewer	Contributor	Collaborator	Coordinator	Owner
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

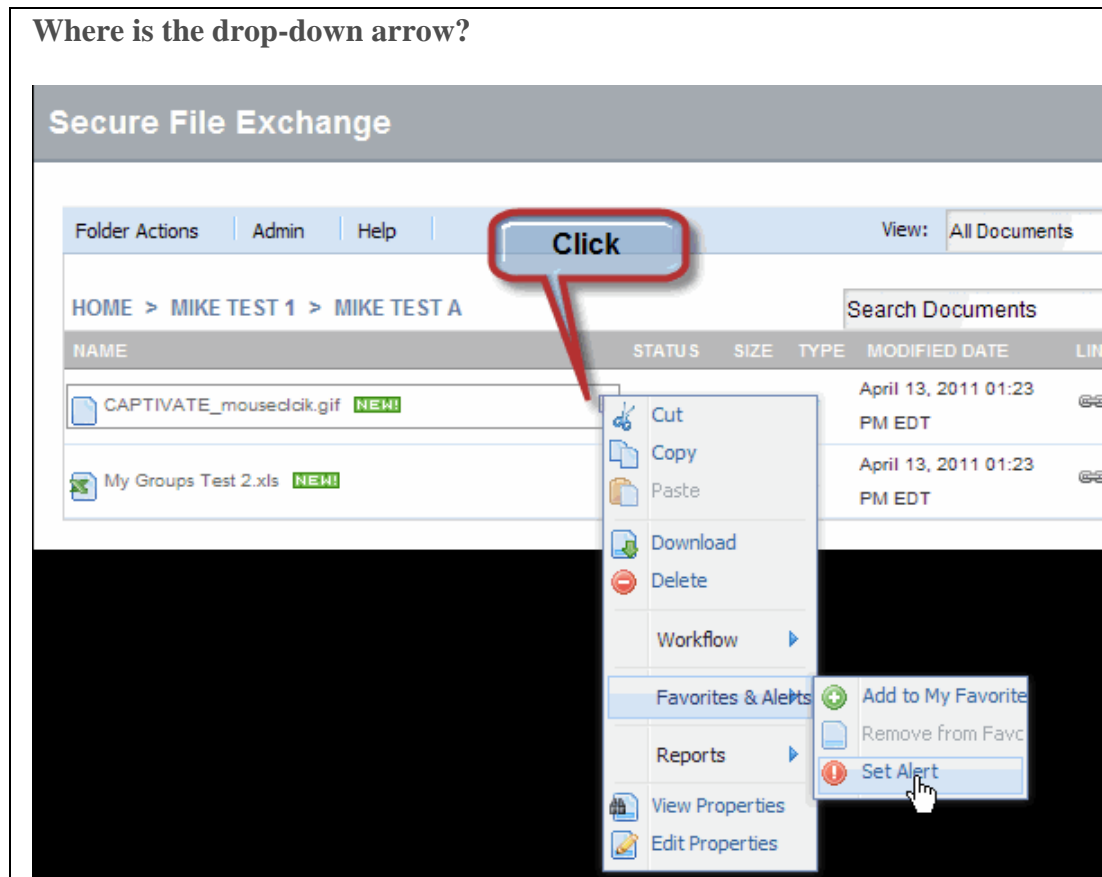
ACTION:	Viewer	Contributor	Collaborator	Coordinator	Owner
View	•	•	•	•	•
Add new folders and files	✖	•	•	•	•
Cut	✖	• (if owner)	• (if owner)	•	✖
Copy	•	•	•	•	•
Paste	✖	•	•	•	•
Download folder as *.zip file	•	•	•	•	•
Delete	✖	• (if owner)	• (if owner)	•	•
Favorites (cascading menu)					
Add to My Favorites	•	•	•	•	•
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 approval workflow	✖	• (if owner)	• (if owner)	•	•
Manage access	✖	• (if owner)	• (if owner)	•	•

STUFF VIEWERS CAN DO

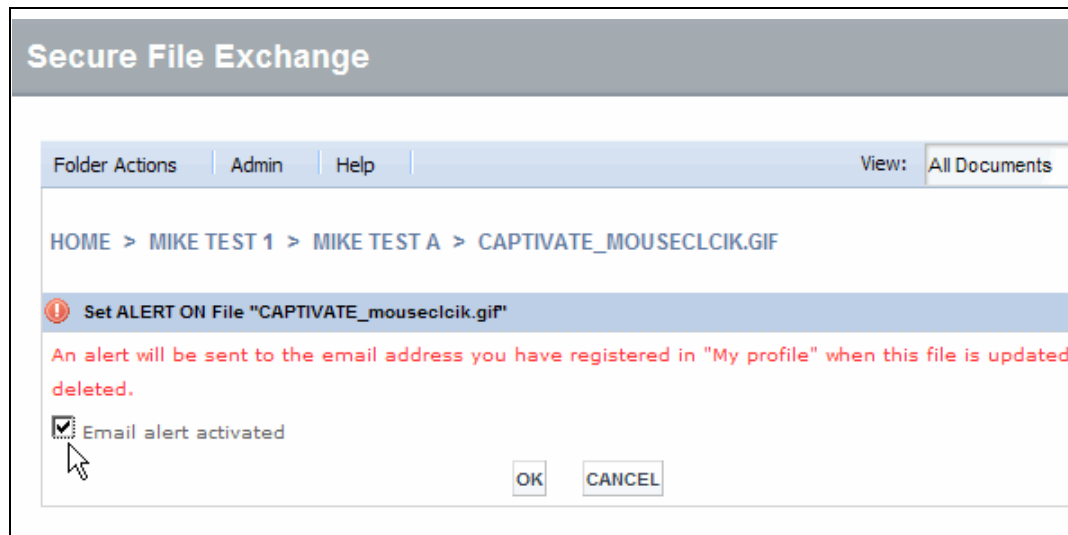
Alerts

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.



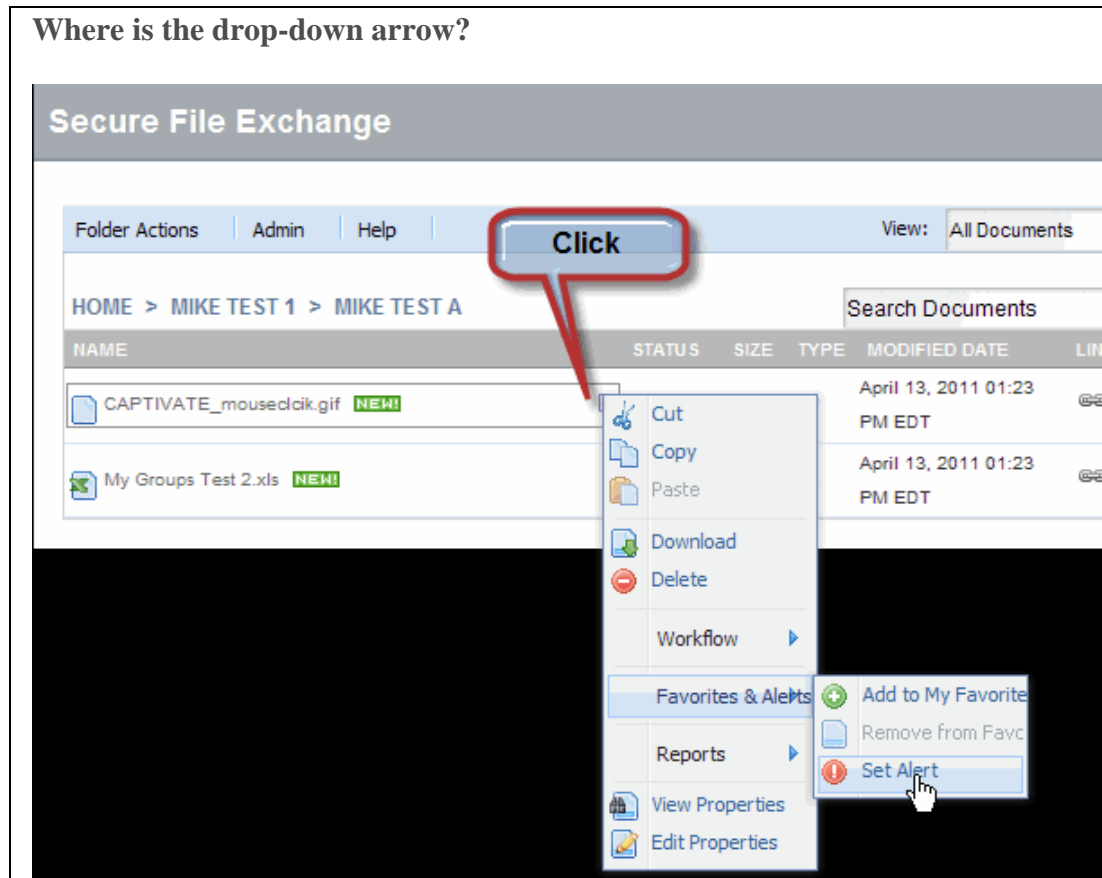
5. Click **OK**. Alerts will no longer be sent to your email account when the item is modified.

RESULT:

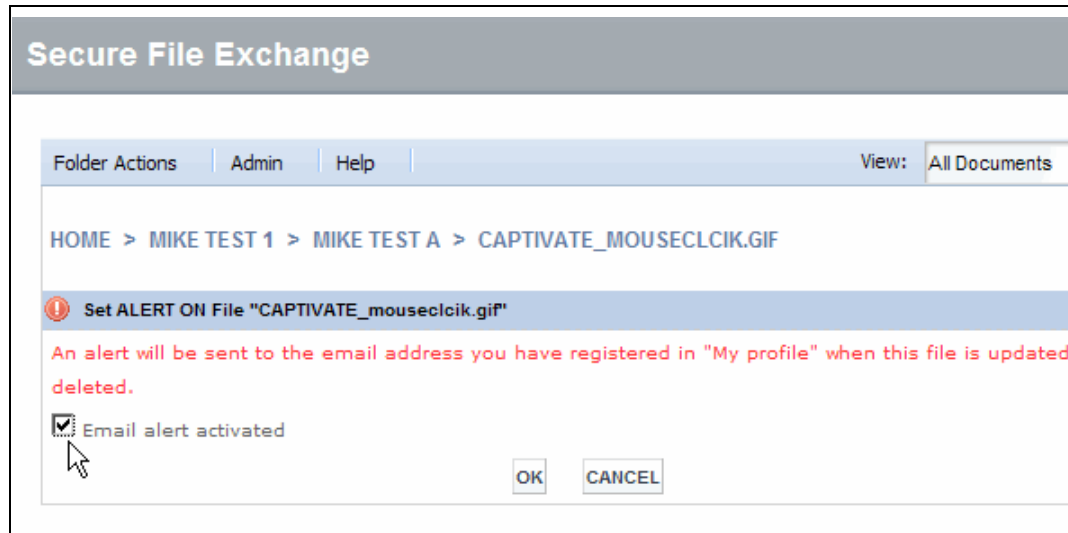
You have removed an alert.

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.

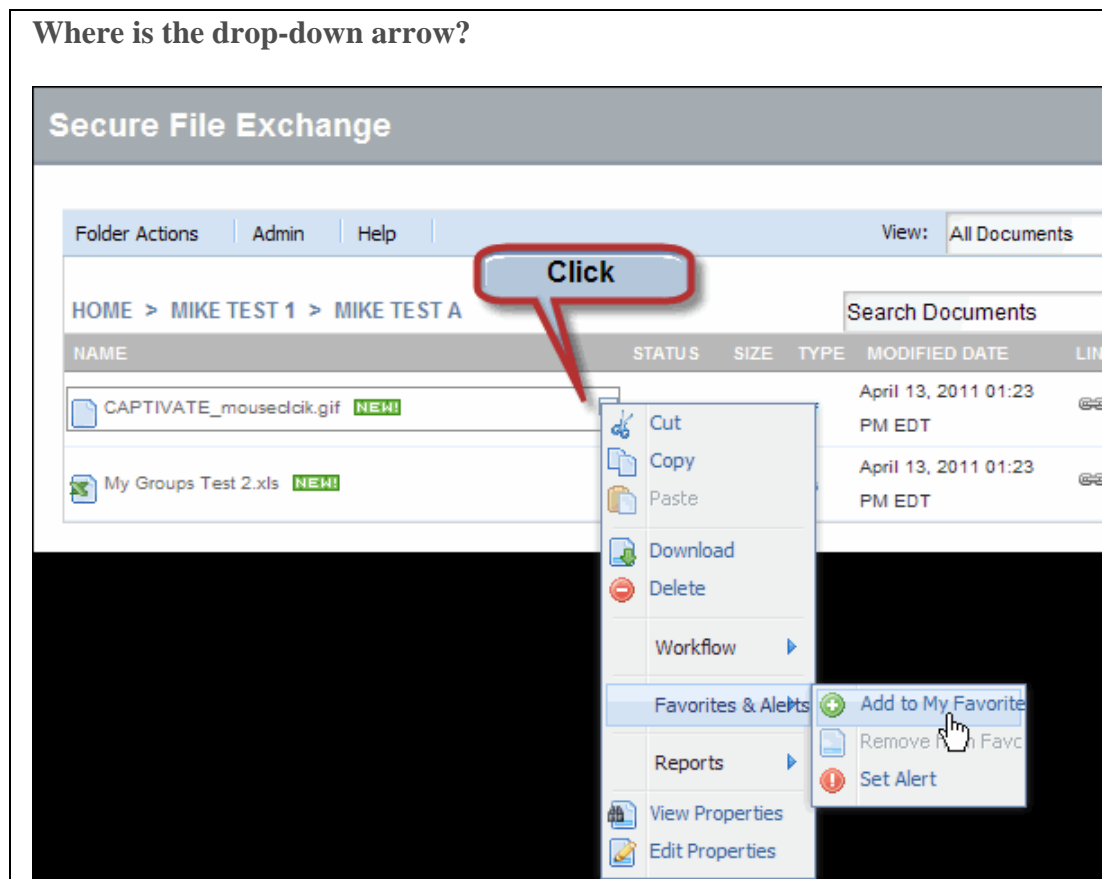
RESULT:

You have set an alert on an item.

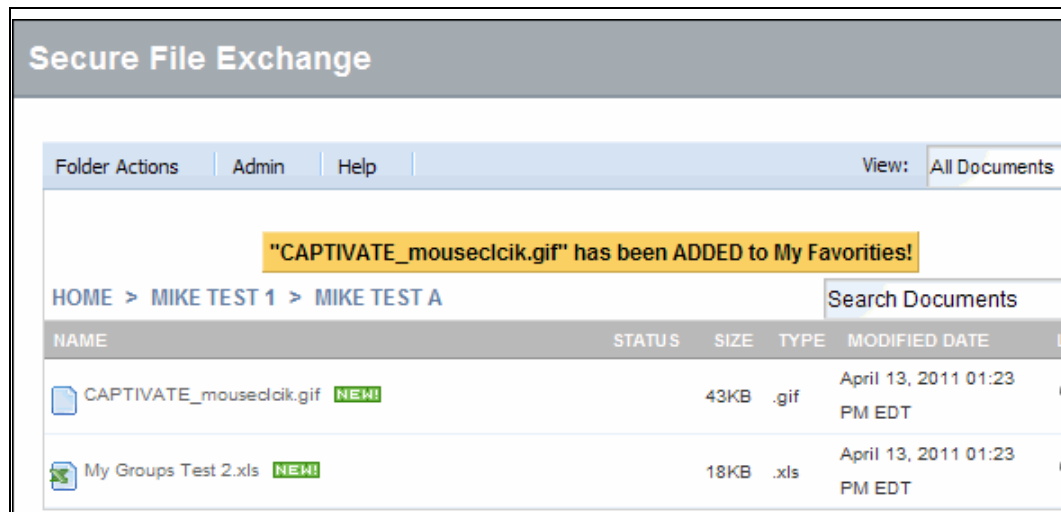
Favorites Menu

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.

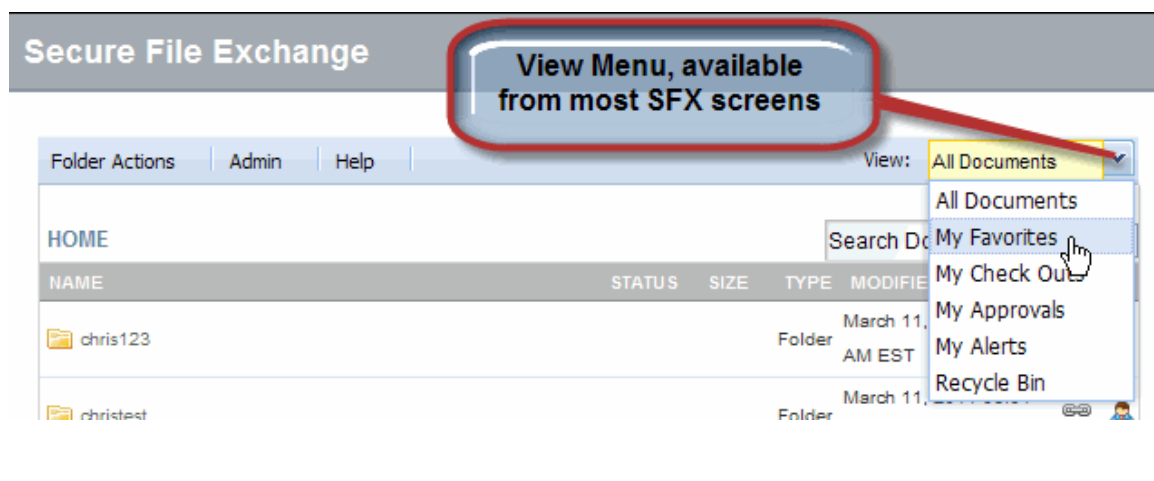


3. From the Favorites and Alerts menu option, click **Add to My Favorites**. A **confirmation message** displays.



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

Where is the View drop-down menu?

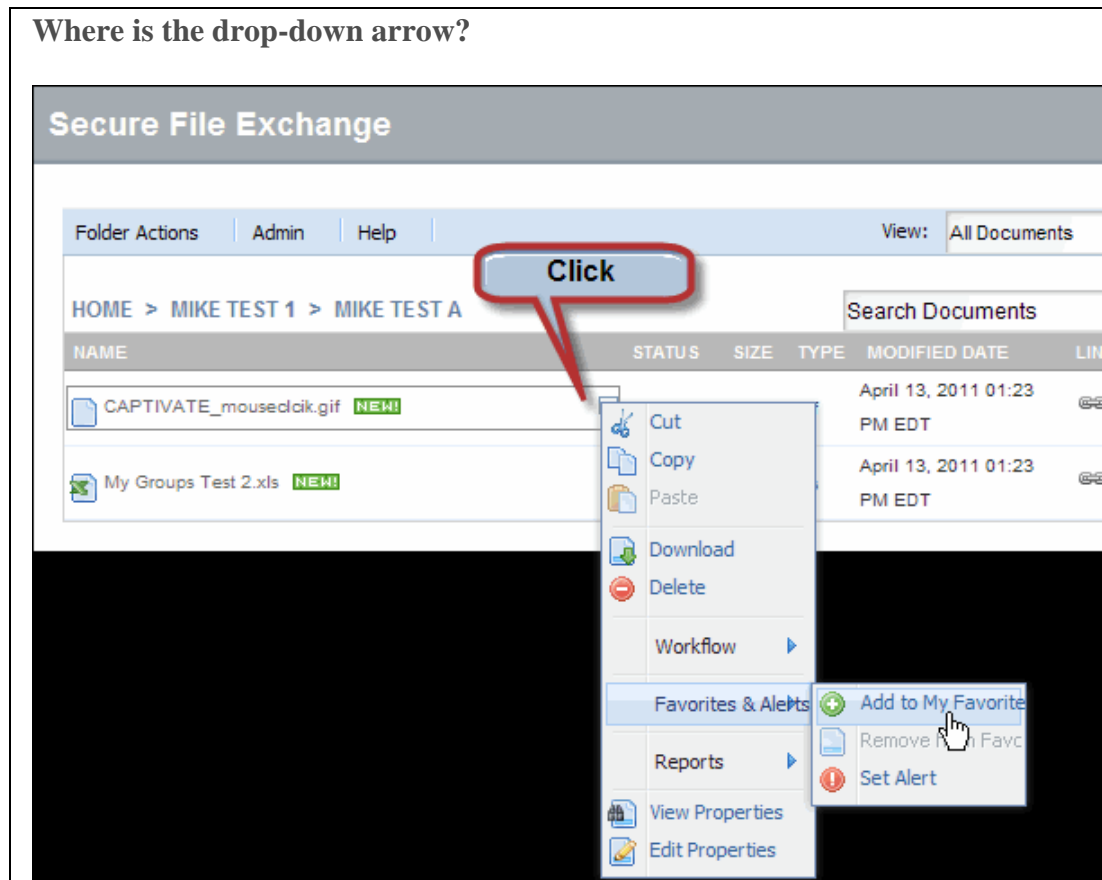


RESULT:

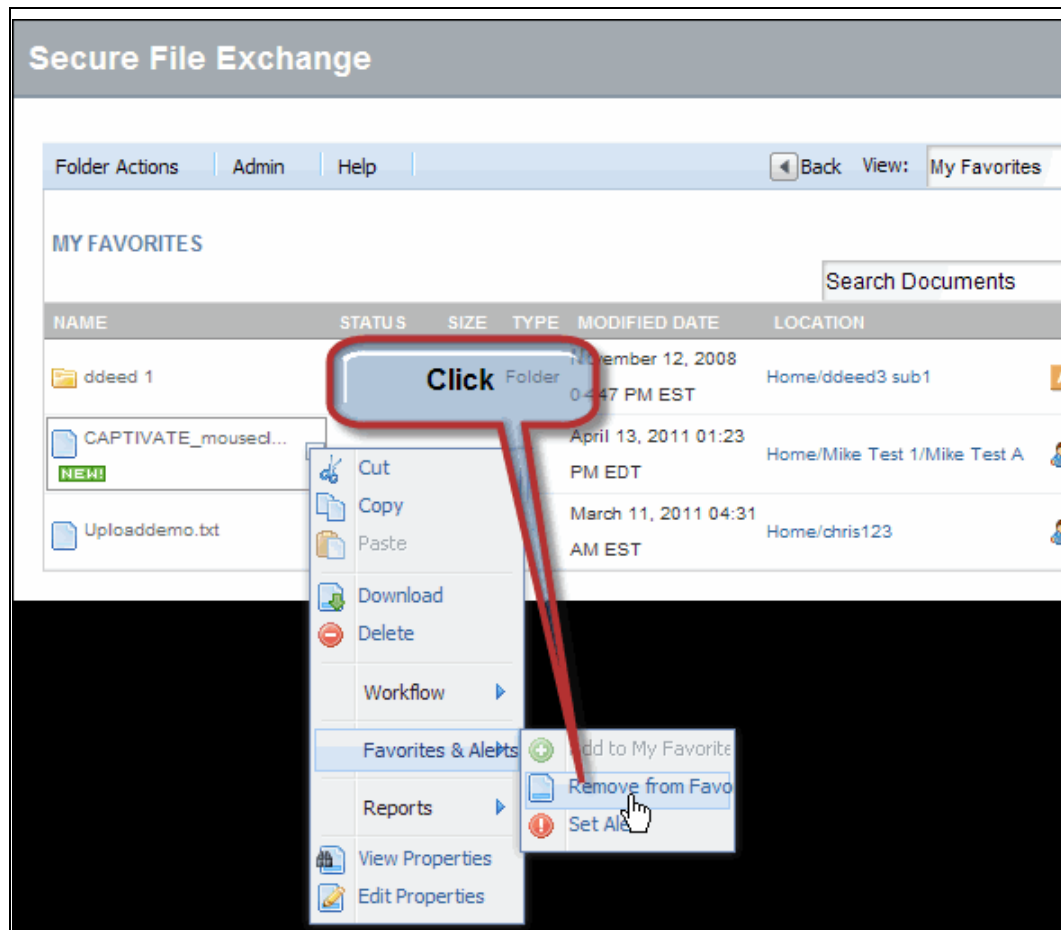
You have successfully added an item to favorites list.

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.

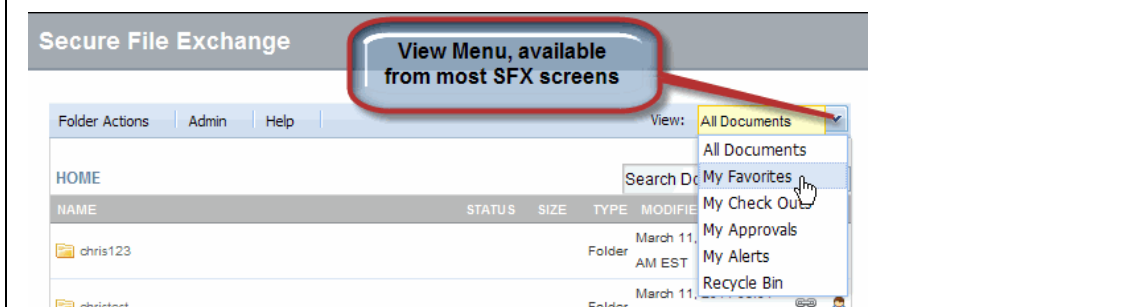


3. From the **Favorites and Alerts** menu option, click **Remove from Favorites**. A confirmation message displays.



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?

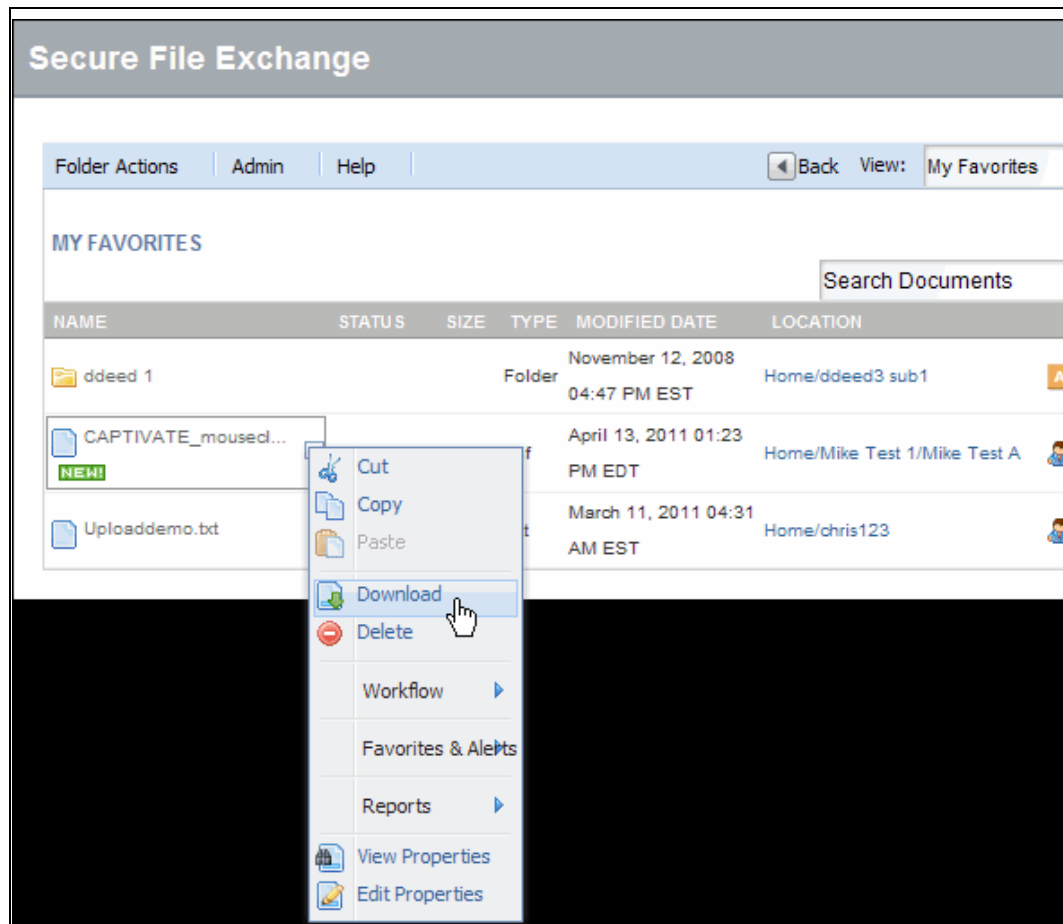


RESULT:

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.

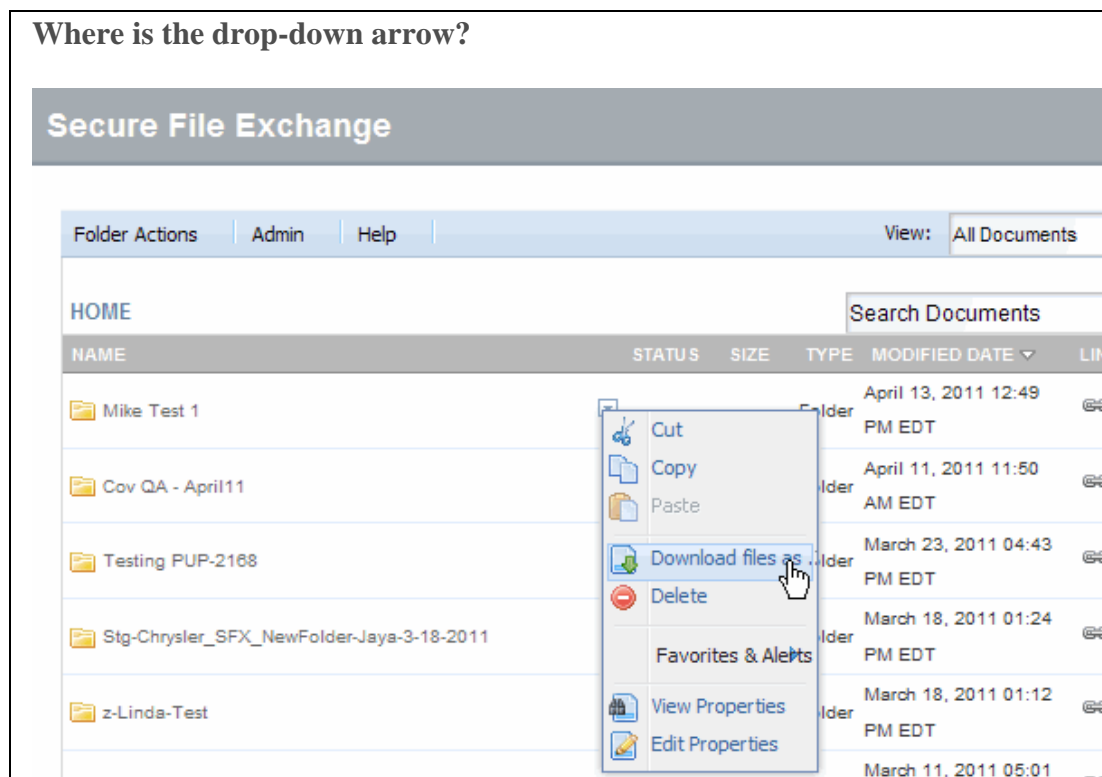
Downloading a Folder and its Files



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.

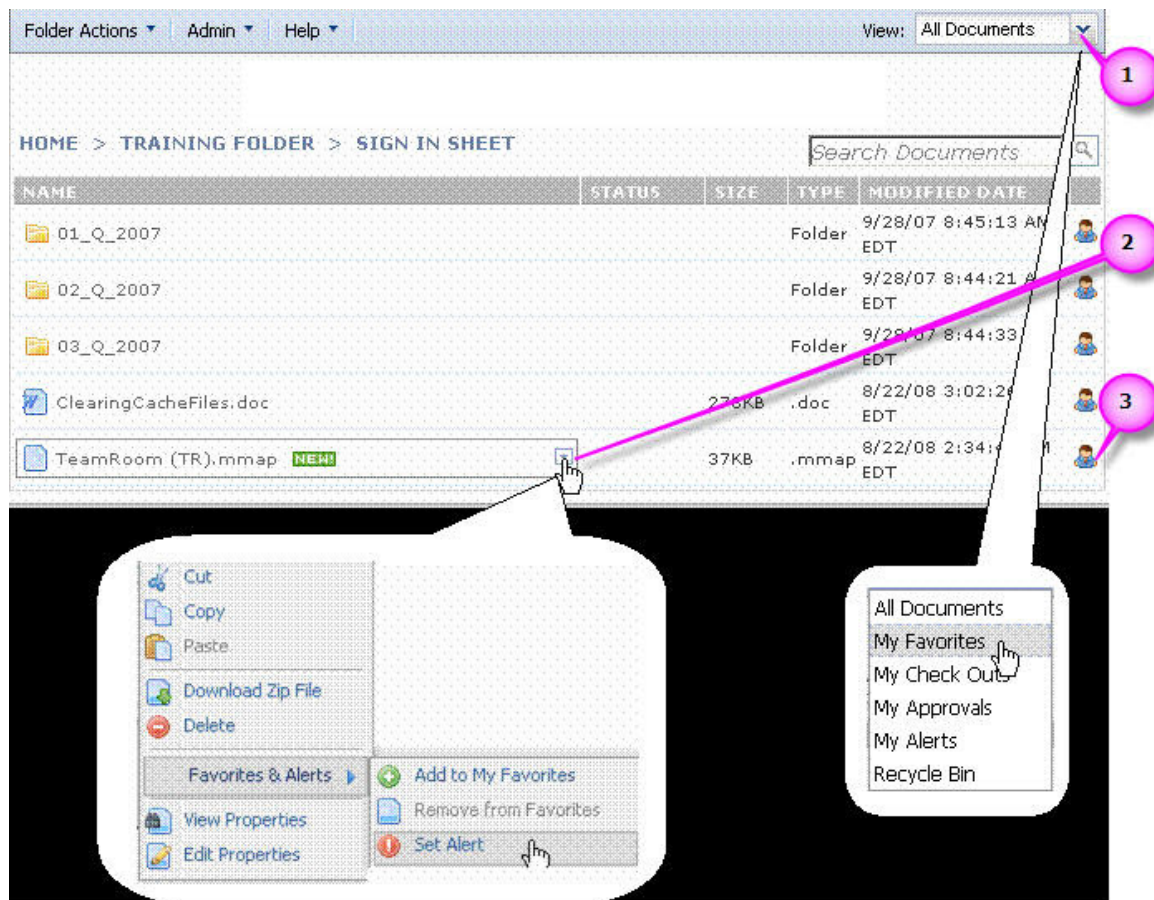
RESULT:

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:

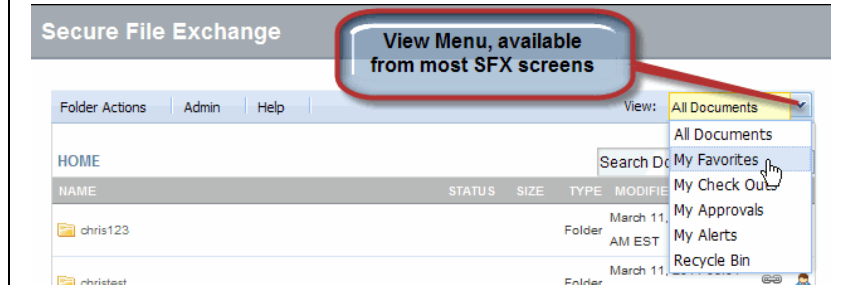
Viewing Files/Folders

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.



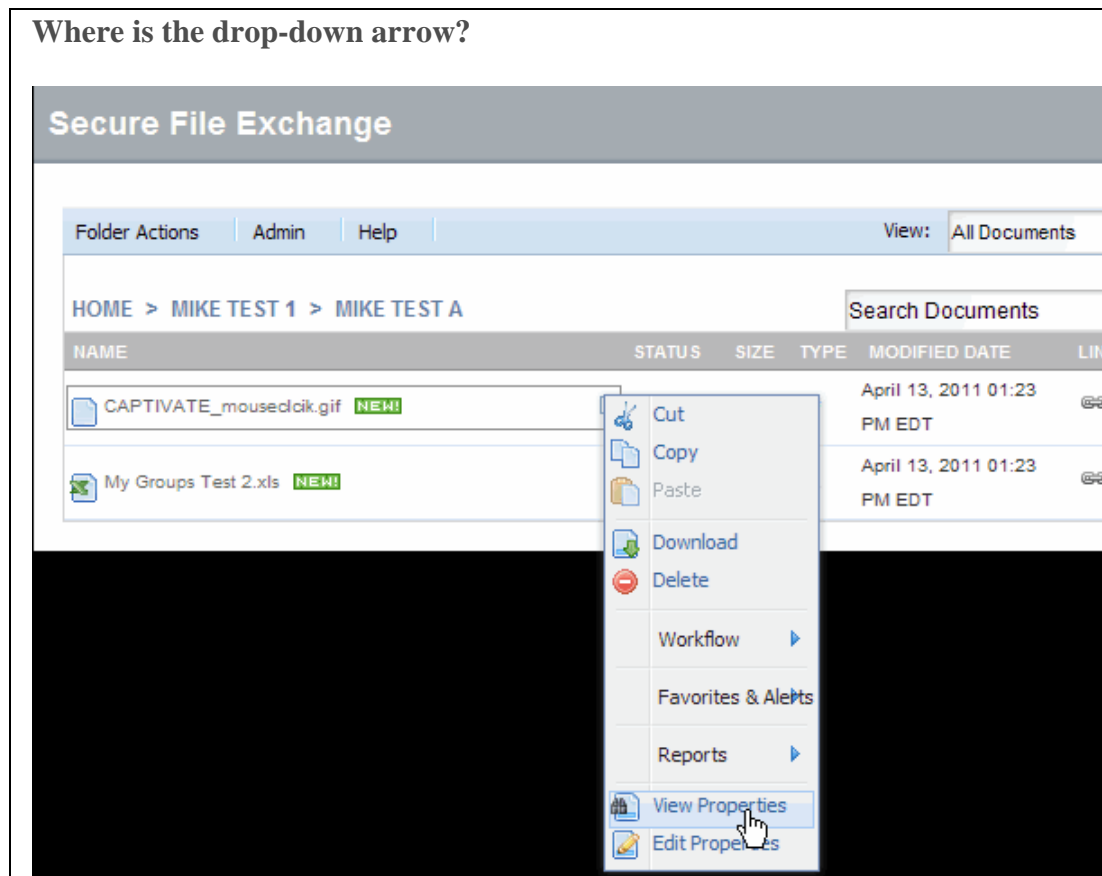
Some files may have expiration dates. When the file is expired, it is removed from view for users who have only the Viewer role.

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.



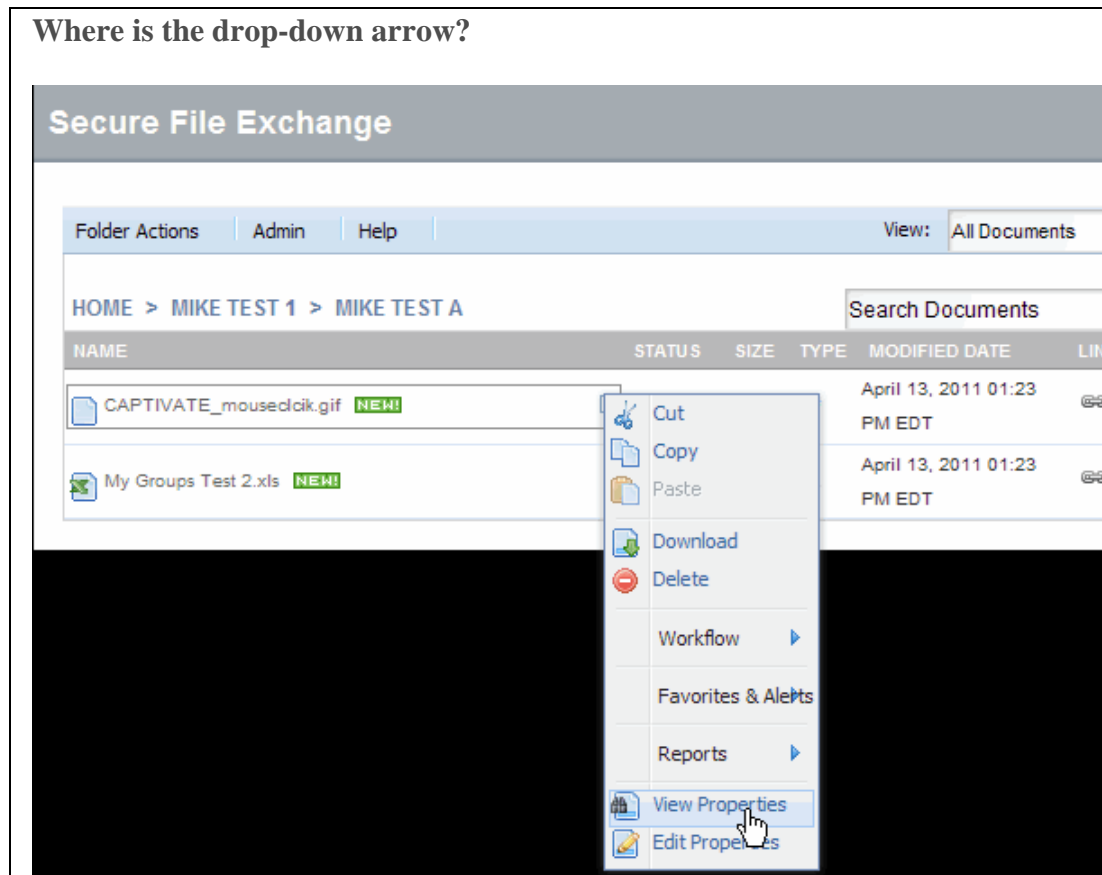
2. Click **View Properties**. A list of users per role is displayed.
3. Click **OK** when finished viewing.

RESULT:

You have successfully viewed access rights.

Viewing Properties

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



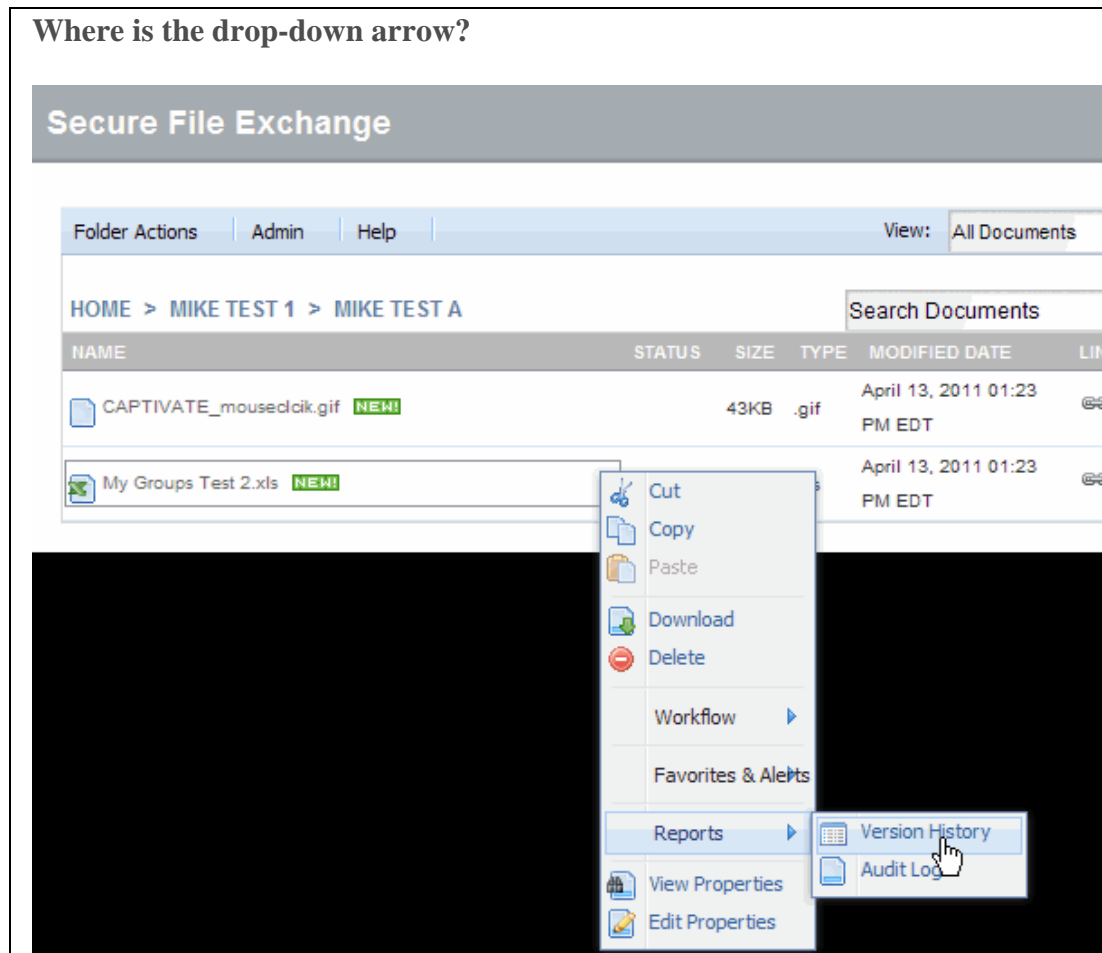
2. Click **View Properties** from the menu.
3. When you are finished viewing the properties, click **OK** to return to the file list screen.

RESULT:

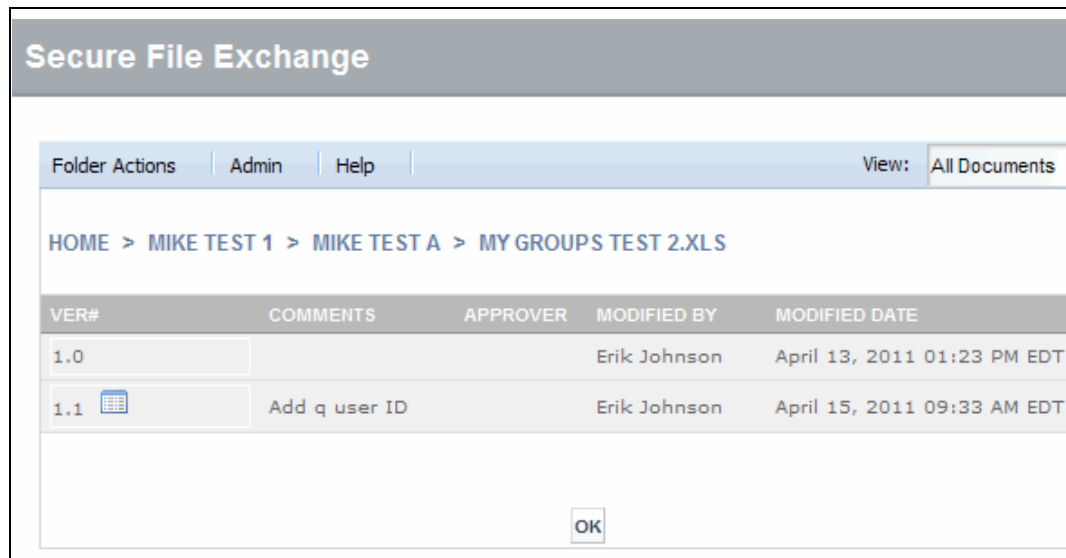
You have successfully viewed file/folder properties.

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.



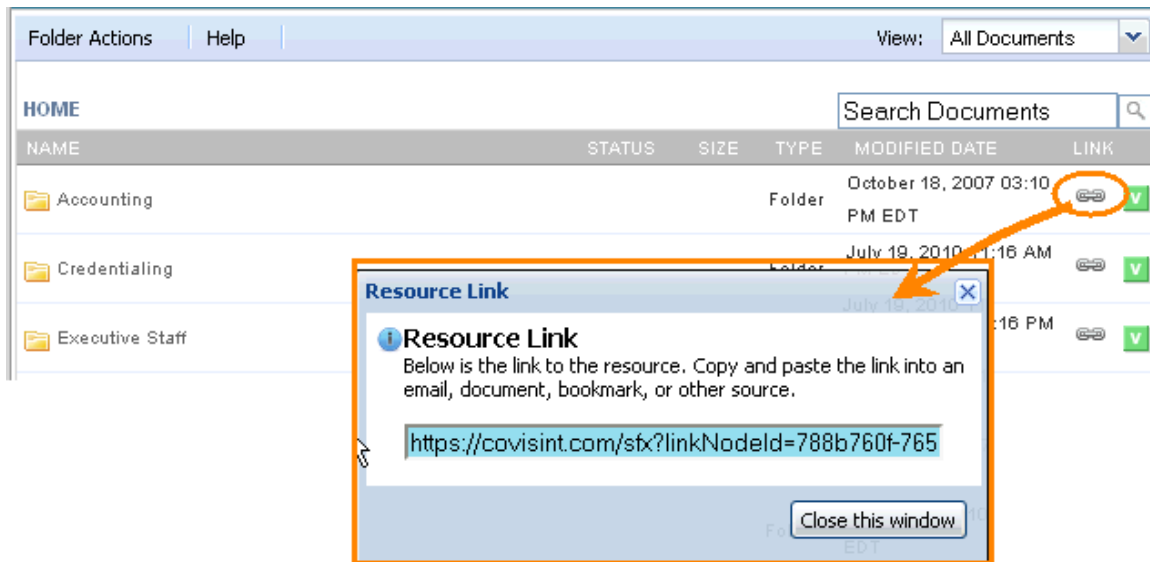
3. When you are finished viewing the history, click **OK** to return to the file list screen.


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.

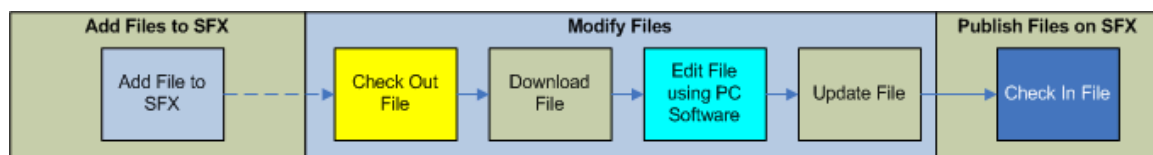
If your organization's implementation supports the "Approval Required" workflow, there are options for how it can be configured by your administrator:


- 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.

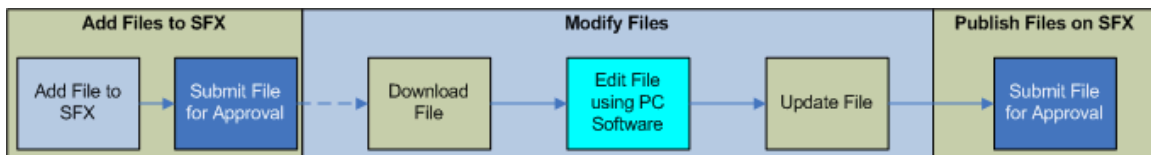
- If the "Require Approval" check box is **not** selected, follow the "No Approval Required" flow.
- If the "Require Approval" check box is selected, follow the "Approval Required" flow.

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

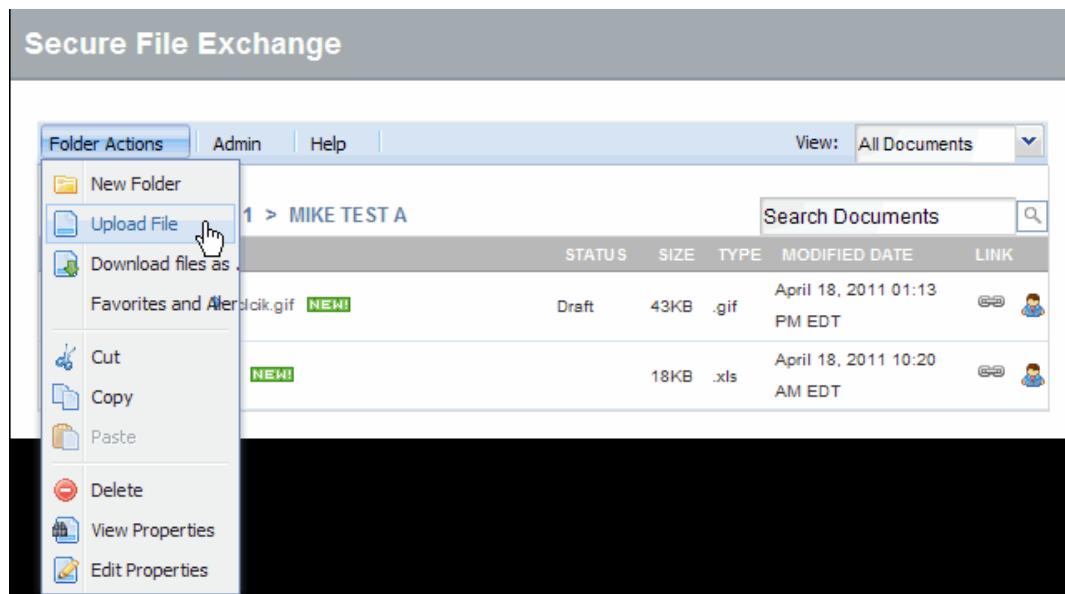


Note: The following special characters are **not allowed** in file names:

/ & : % + ? ; *

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

Folder Actions | Admin | Help | View: All Documents

HOME > MIKE TEST 1 > MIKE TEST A

CREATE FILE(s)

Keywords:

Description:

☐ Require approval *Changes to File(s) are subject to approval*

☐ Viewer(s) can access this file between the date range specified

Upload file: **Browse...**

[+ Add another file](#)

OK CANCEL

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

Folder Actions | Admin | Help | View: All Documents

HOME > MIKE TEST 1 > MIKE TEST A

CREATE FILE(s)

Keywords:

Description:

☒ Require approval *Changes to File(s) are subject to approval*

☐ Viewer(s) can access this file between the date range specified

Upload file:

[+ Add another file](#)

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**.

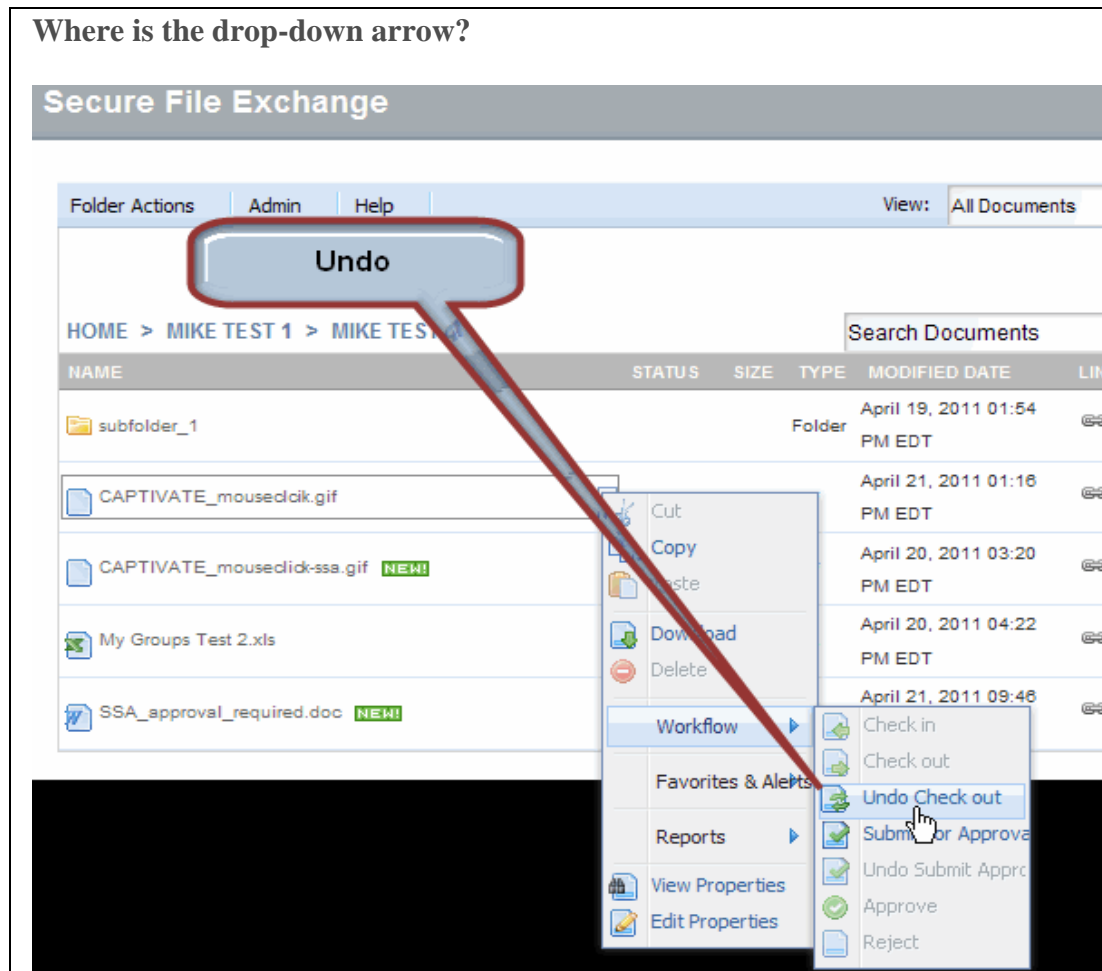
- If approval is **not** required, the file will be accessible immediately.
- If approval is required, your file is uploaded as a draft. Your file is not available to SFX users until it is approved. Proceed to the section entitled Submitting a Draft for Approval.

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.

Secure File Exchange

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

"My Groups Test 2.xls" UNDO CHECK OUT complete!

[HOME](#) > [MIKE TEST 1](#) > [MIKE TEST A](#) Search Documents

NAME	STATUS	SIZE	TYPE	MODIFIED DATE	L
 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.

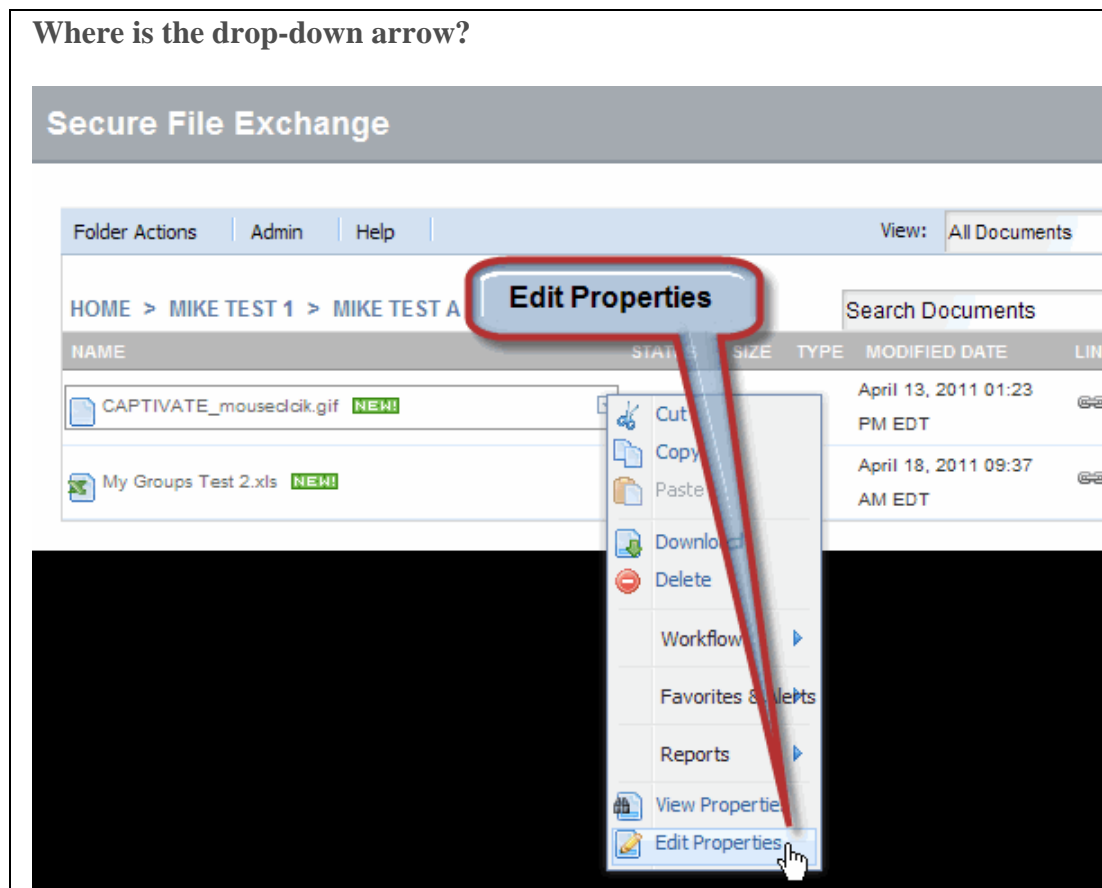
Changing File or Folder Ownership



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.

Secure File Exchange

Folder Actions | Admin | Help | View: All Documents

HOME > MIKE TEST 1 > MIKE TEST A > CAPTIVATE_MOUSECLCIK.GIF

EDIT PROPERTIES

Name: CAPTIVATE_mousedclik.gif

Description:

Keywords:

☐ Require approval Changing to files(s) are subject to approval

☐ Effective dates View(s) can access this file within the date range specified

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

COORDINATOR: Chrysler, Tester Two

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

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

OWNER:

Change Owner

Jo


OK CANCEL

- 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:

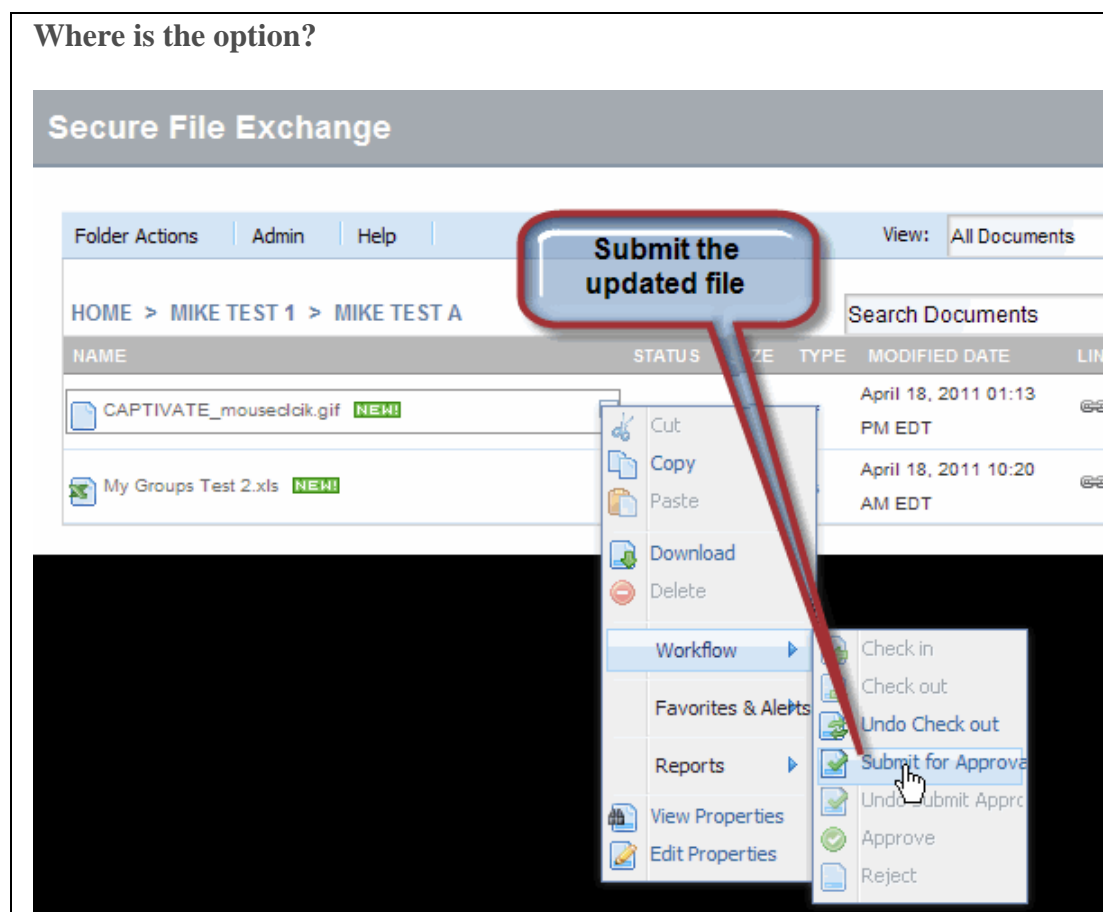
You have successfully changed ownership of a file or folder.

Checking In a File (approval required)

 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.

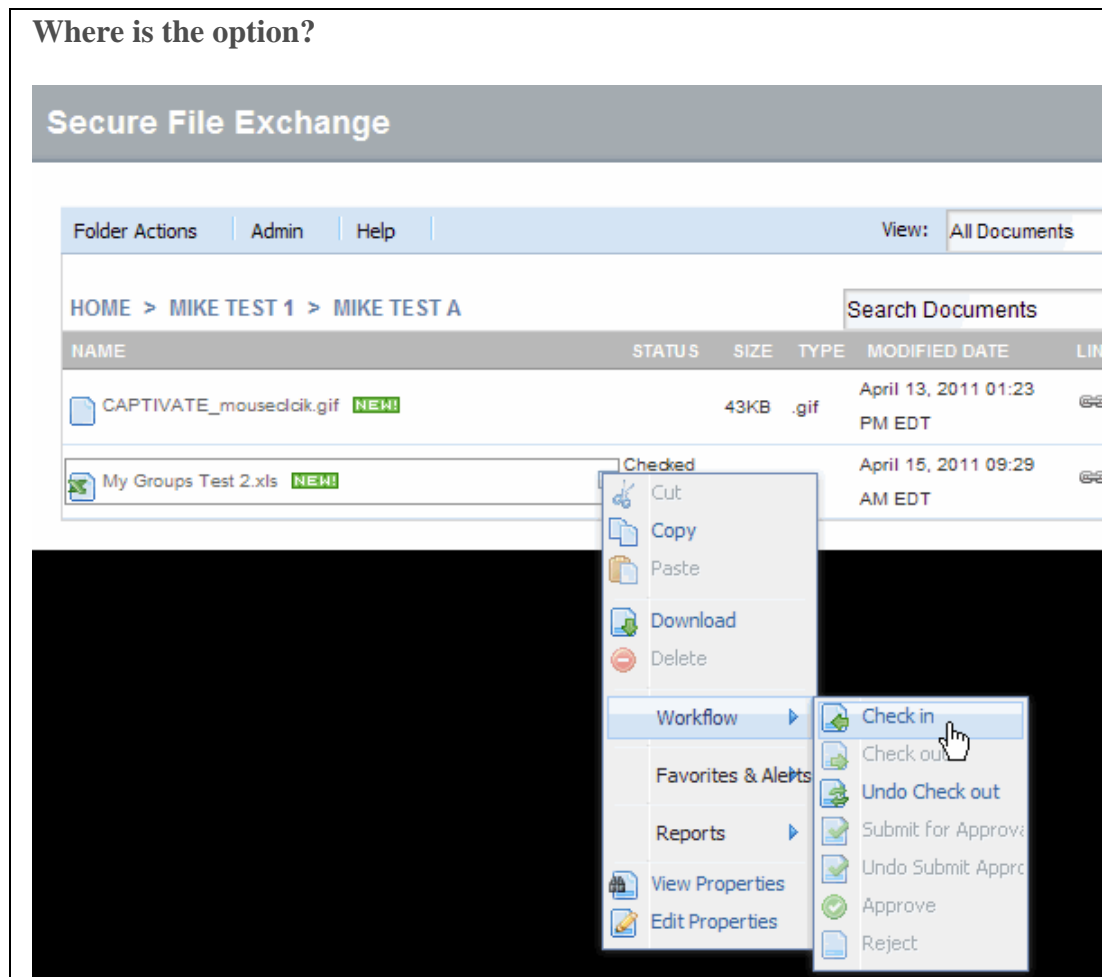
4. The file must be approved before it will be available to other users.

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



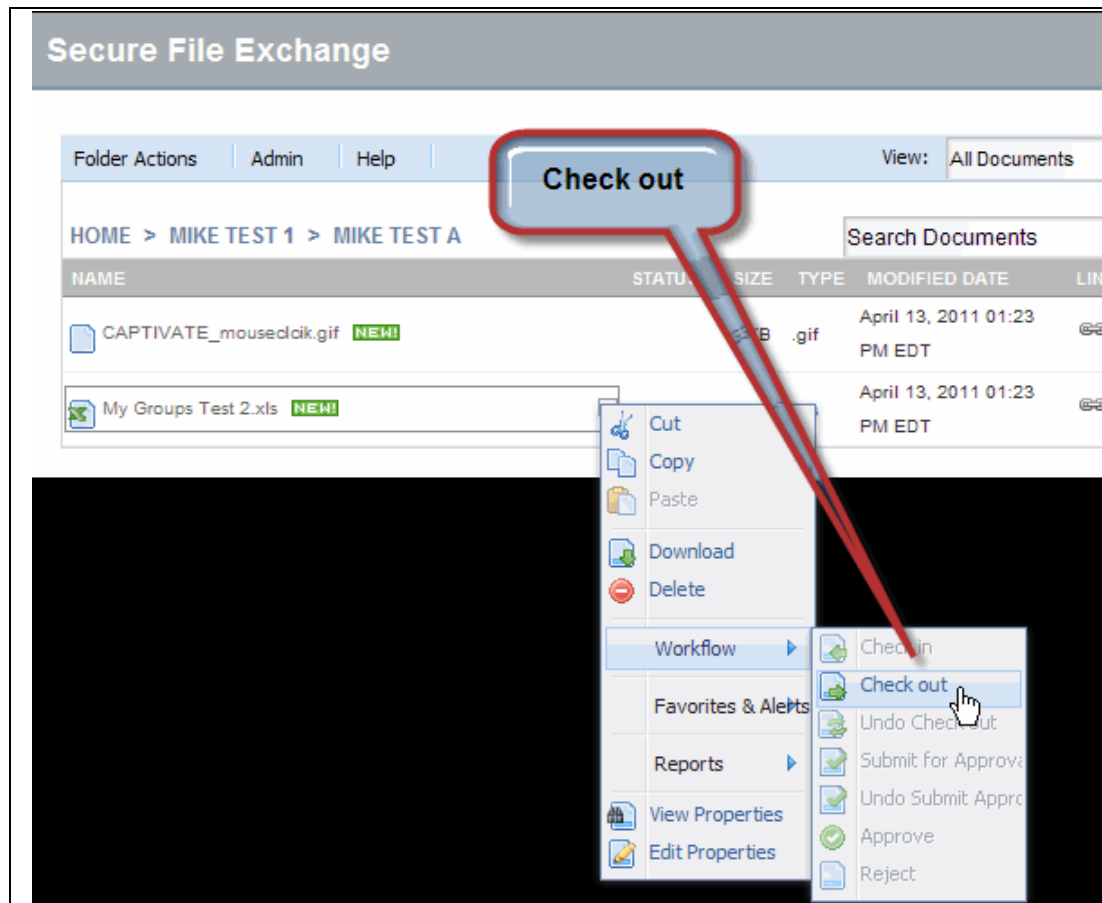
Checking out a file 'locks' the file so that other users cannot upload new versions of the file. Users can view and download a checked out file.

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

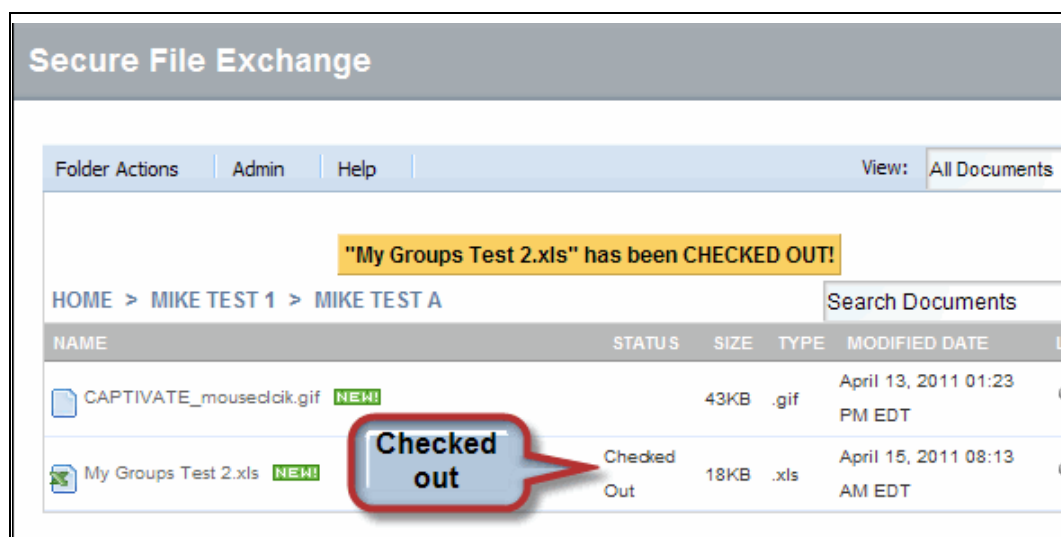
- undo the check out
 - upload the new version of the file.
-

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

<p>Where is the drop-down arrow?</p>



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

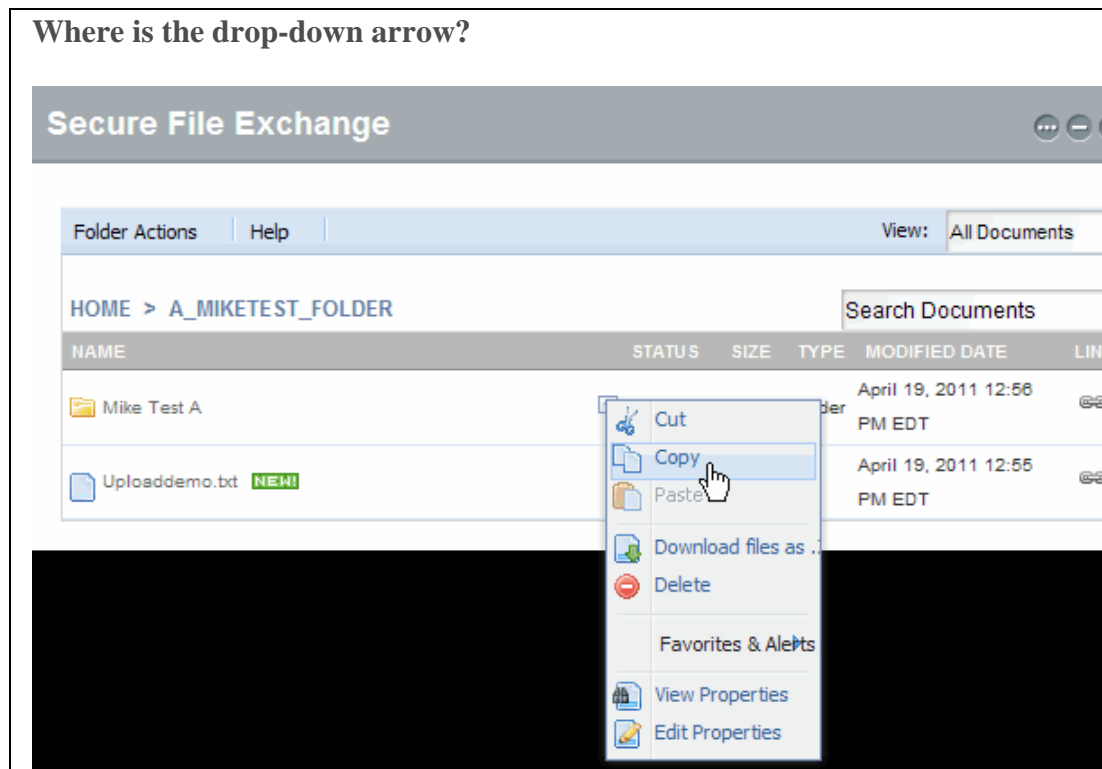


RESULT:

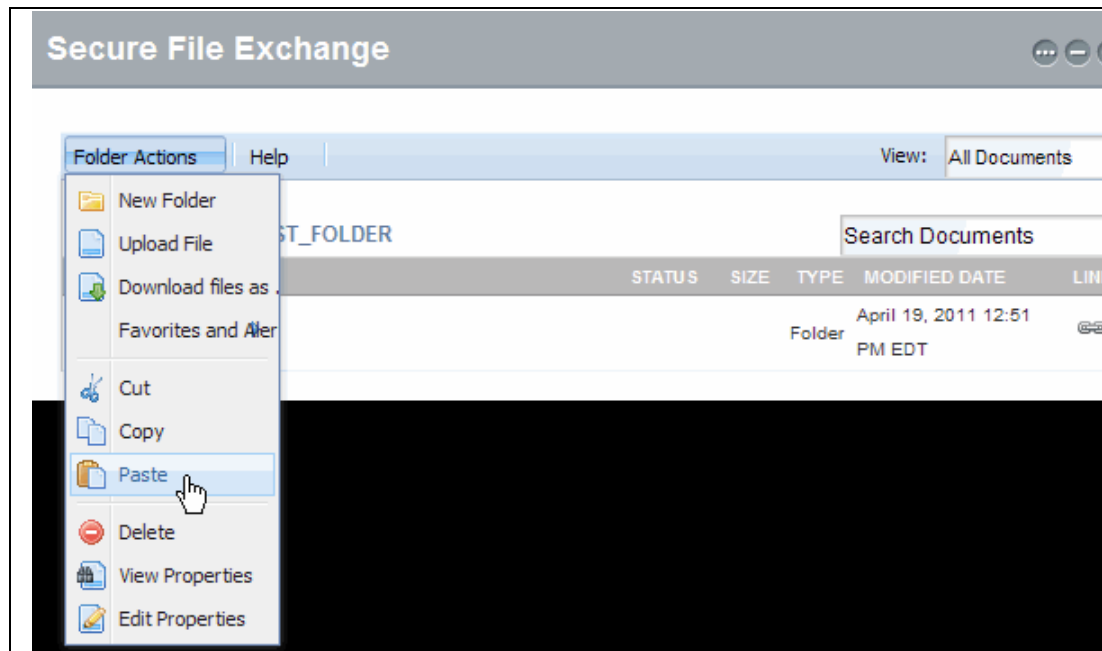
You have successfully checked out a file. After modifying the file, perform the steps to store the updated file in SFX, and then perform the file check in task.

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.

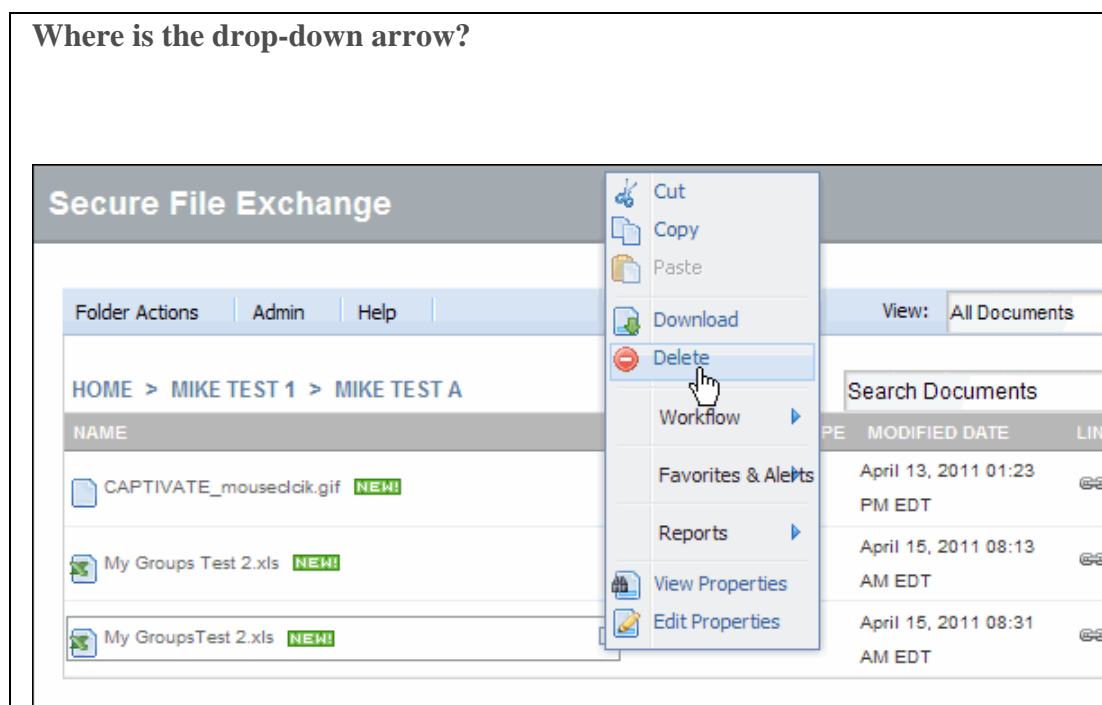
RESULT:

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.



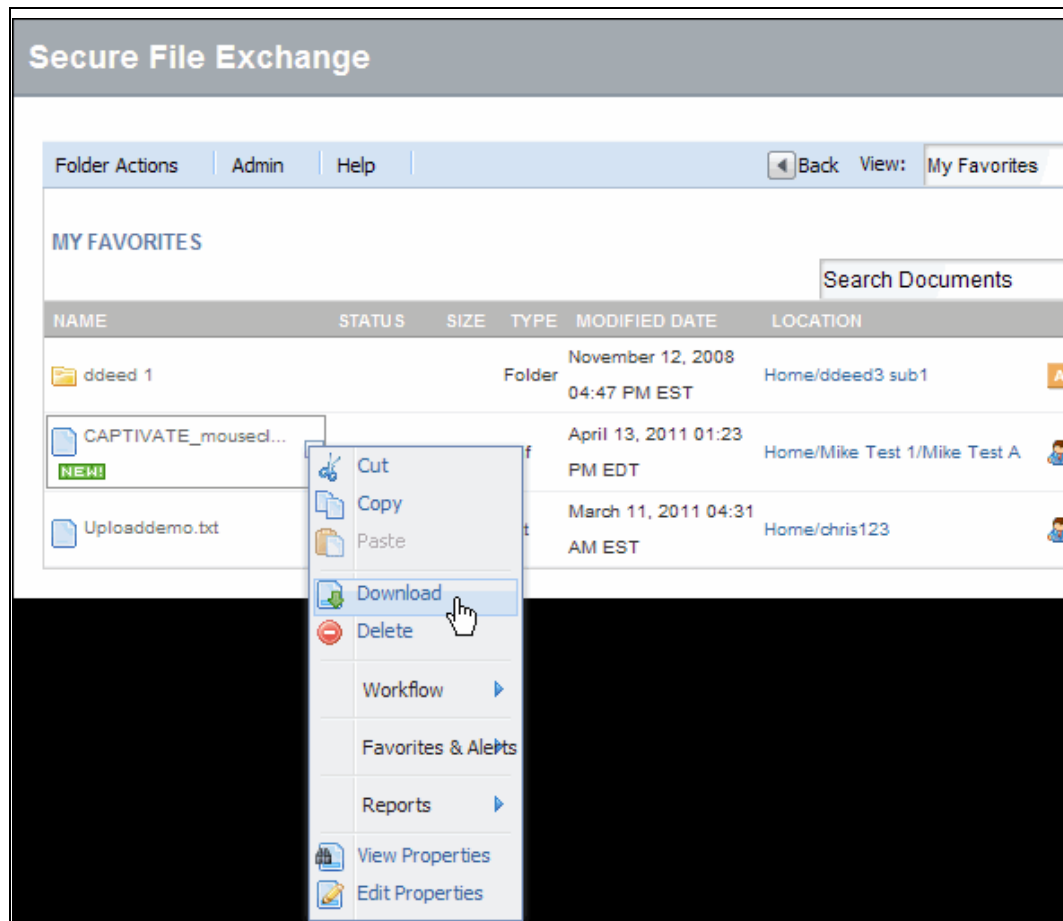
3. Click **Delete**.
4. Click **Yes** to confirm deletion.

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.

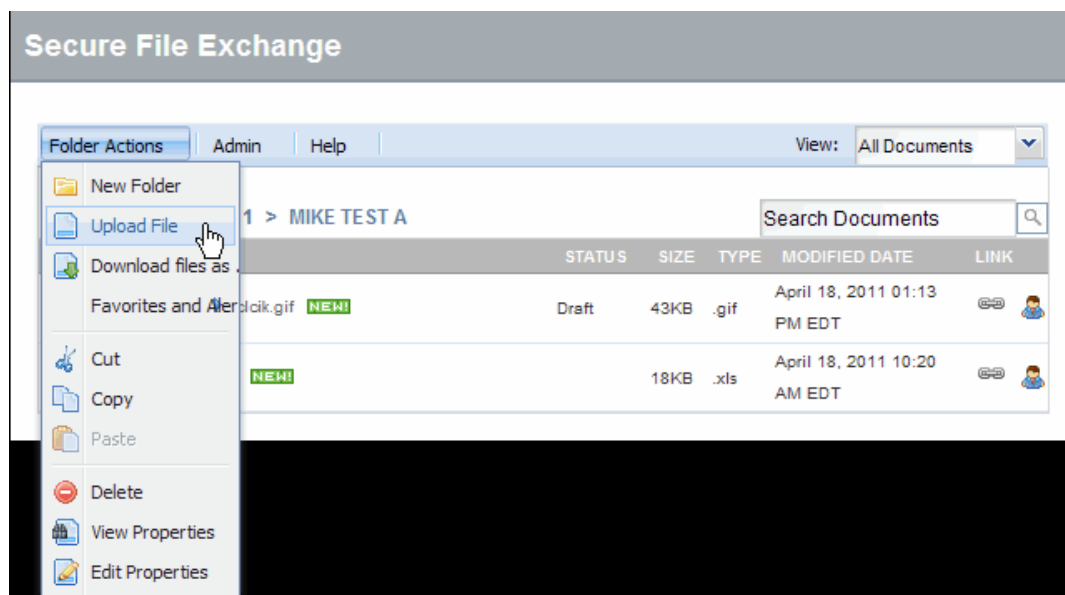
Updating a File

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 >>>**



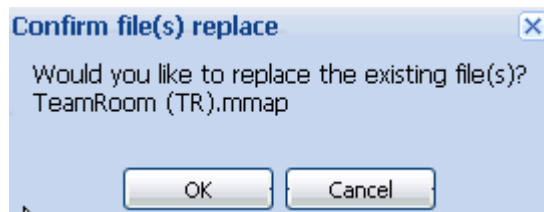
Note: The following special characters are **not allowed** in file names:

/ & : % + ? ; *

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:

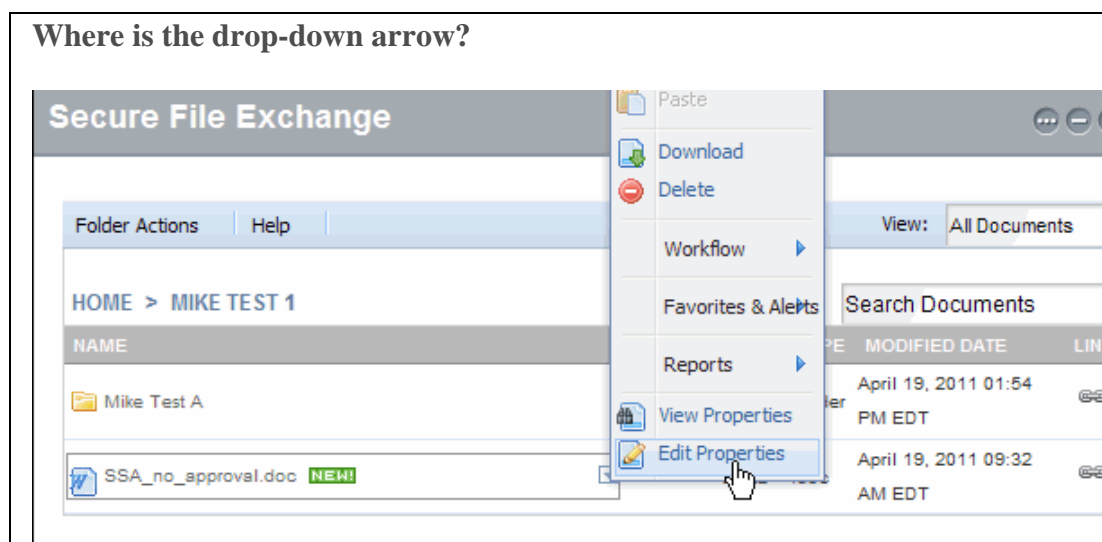
You have successfully updated a file.

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.

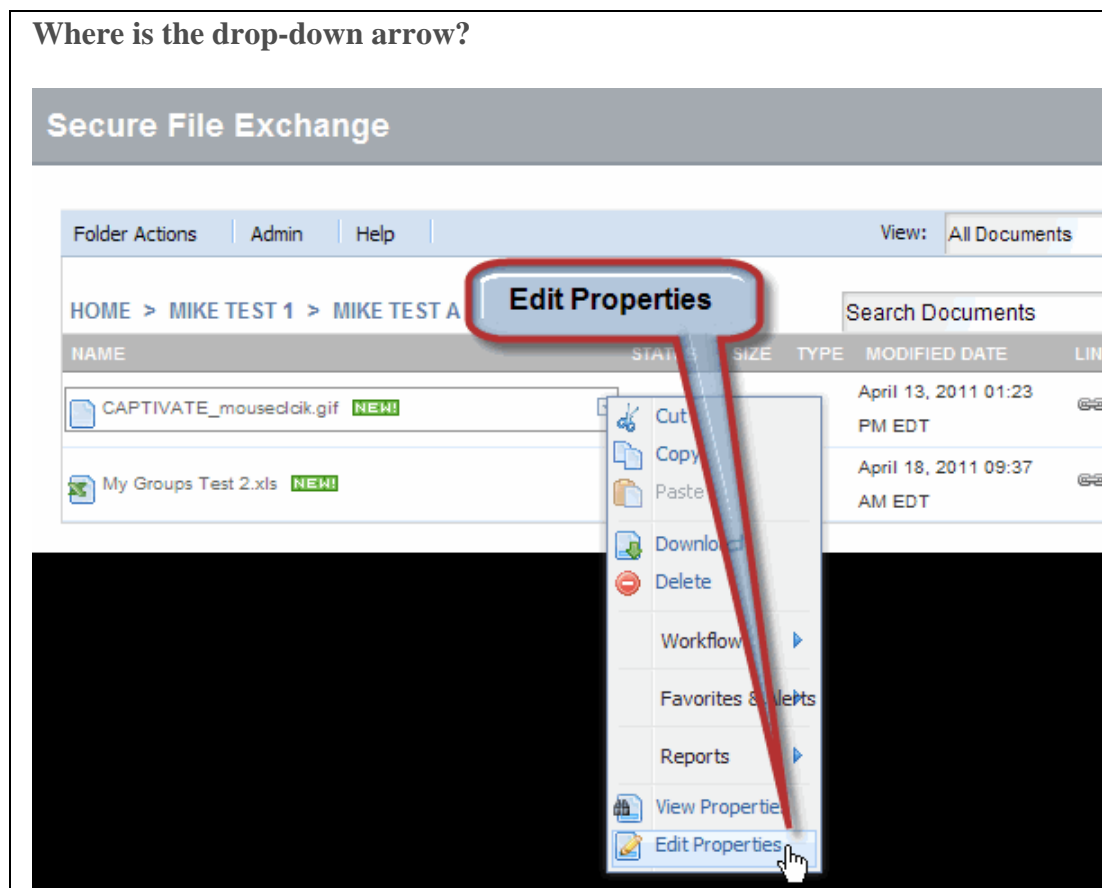
Modifying Access Rights to a File or Folder

-  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:
 Tahoma **B** *I* U **A⁺** **A⁻**

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:

Test2-inheritance

Description:

Tahoma

B

I

U

A⁺

A⁻

A

ab

Upload Custom Icon:

Select an icon:

Browse...

Submit

☐ Require approval

Changes to files(s) are subject to approval

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

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:

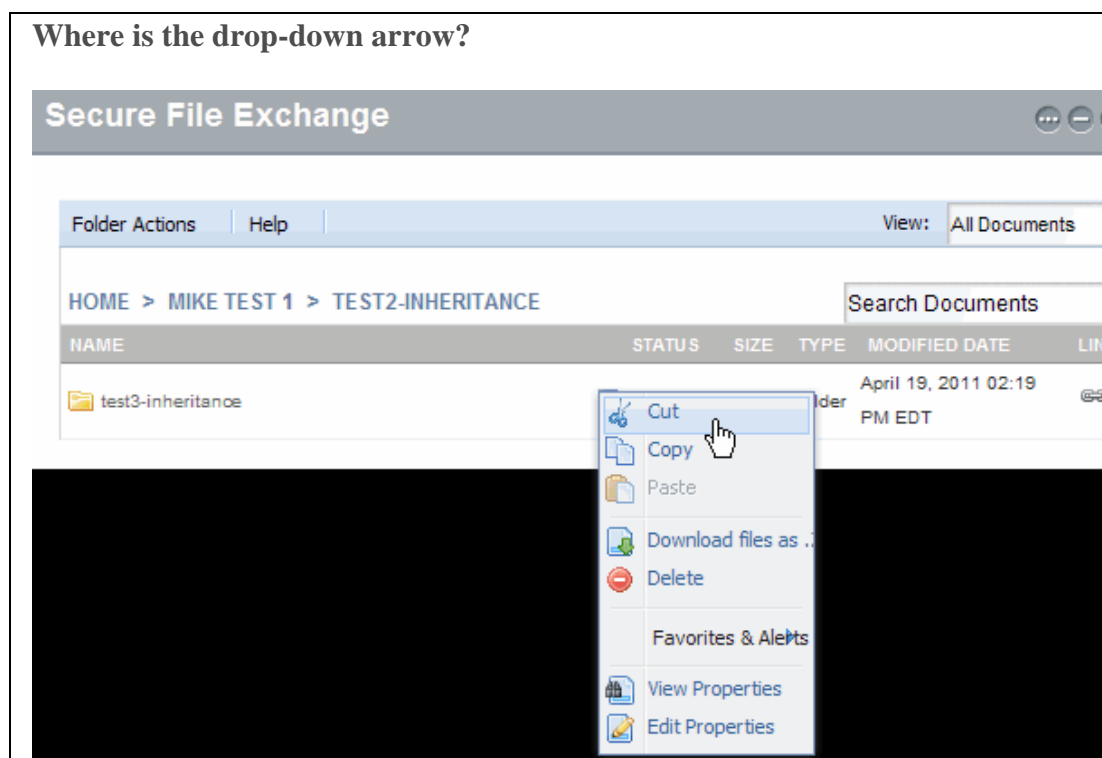
You have successfully modified access rights on an item.

Moving a File or Folder with Cut



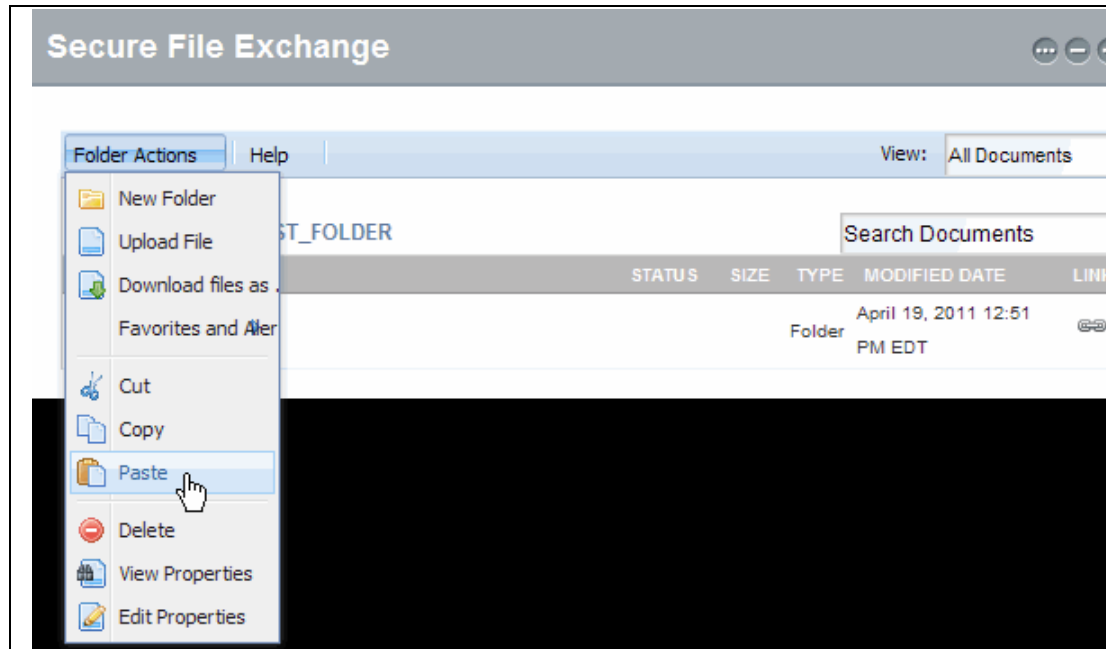
You must be the file or folder owner or have an appropriate role to move a file or folder using Cut.

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**.

Where is the option?

**RESULT:**

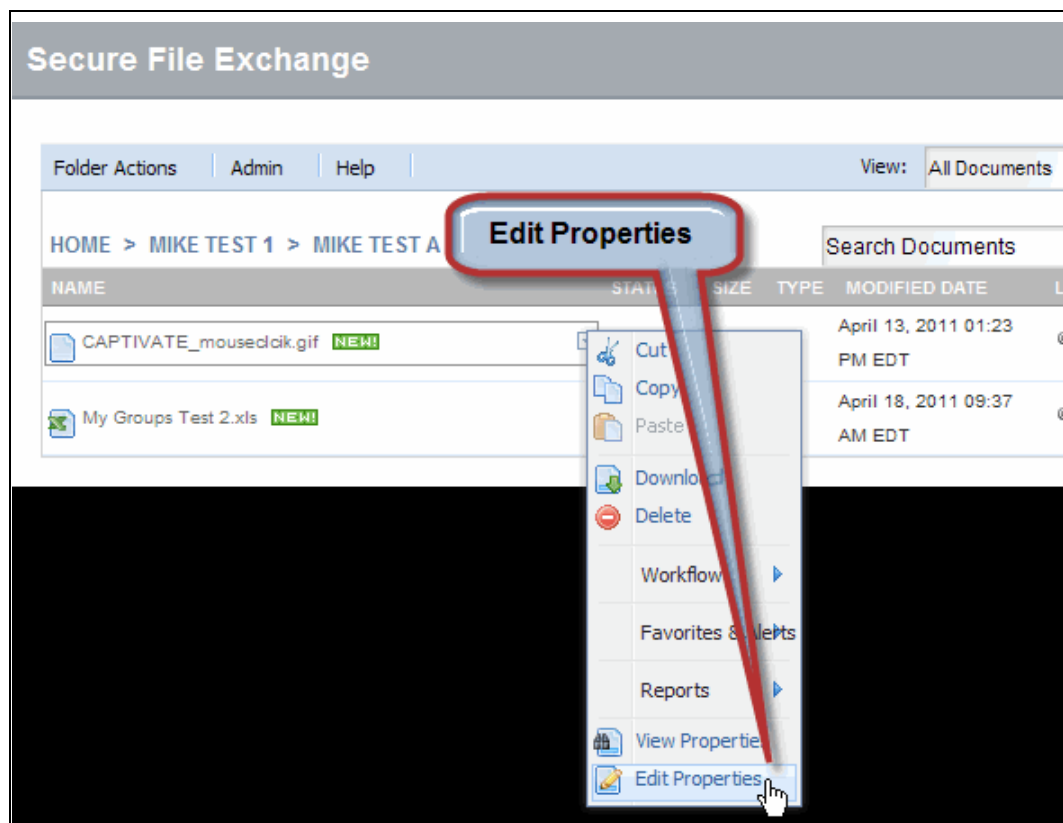
You have successfully cut and pasted a file or folder.

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.

Secure File Exchange

Folder Actions | Admin | Help | View: All Documents

HOME > MIKE TEST 1 > MIKE TEST A > CAPTIVATE_MOUSECLCIK.GIF

EDIT PROPERTIES

Name: CAPTIVATE_mouseclcik.gif

Description:

Keywords:

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

Add Approvers

☐ **Effective dates** Viewer(s) can access this file within the date range specified

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_mousedclcik.gif" properties have been UPDATED !

HOME > MIKE TEST 1 > MIKE TEST A

Search Documents

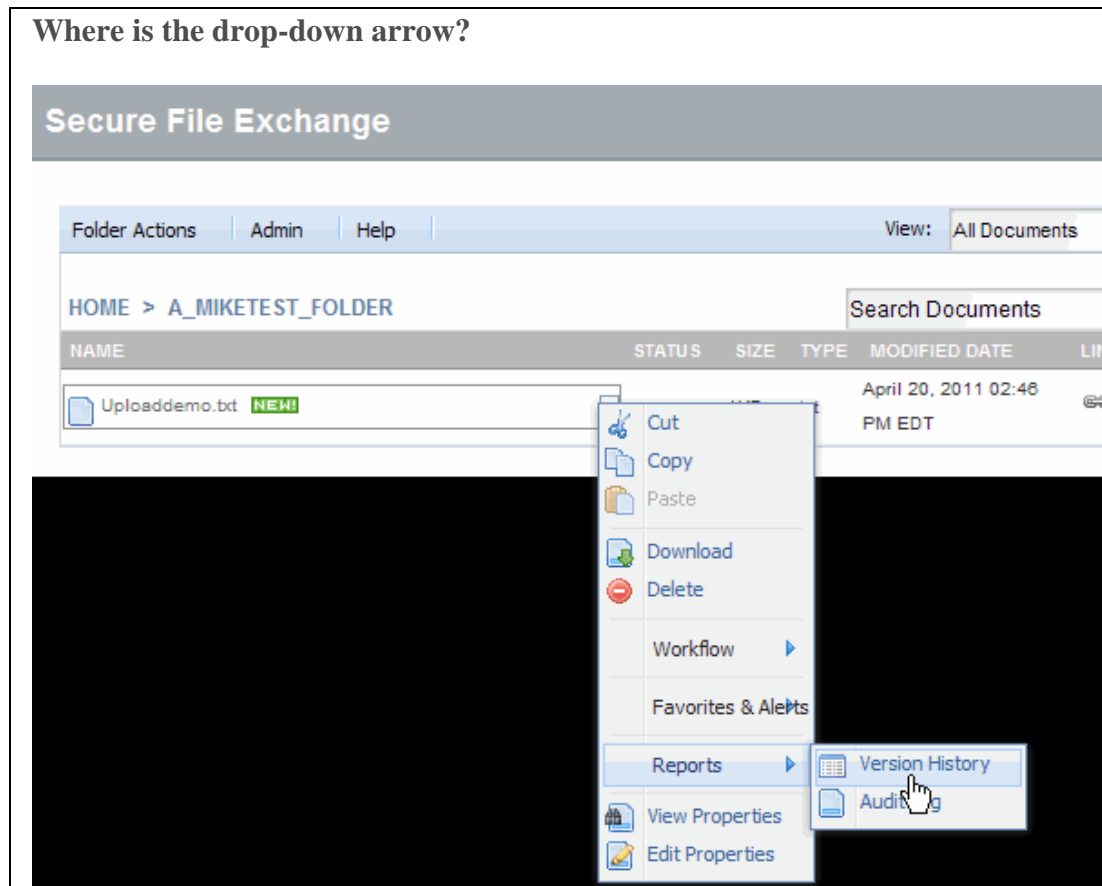
NAME	STATUS	SIZE	TYPE	MODIFIED DATE	
 CAPTIVATE_mousedclcik.gif NEW!		43KB	.gif	April 18, 2011 01:05 PM EDT	
 My Groups Test 2.xls NEW!		18KB	.xls	April 18, 2011 10:20 AM EDT	

RESULT:

You have successfully required approval on a file.

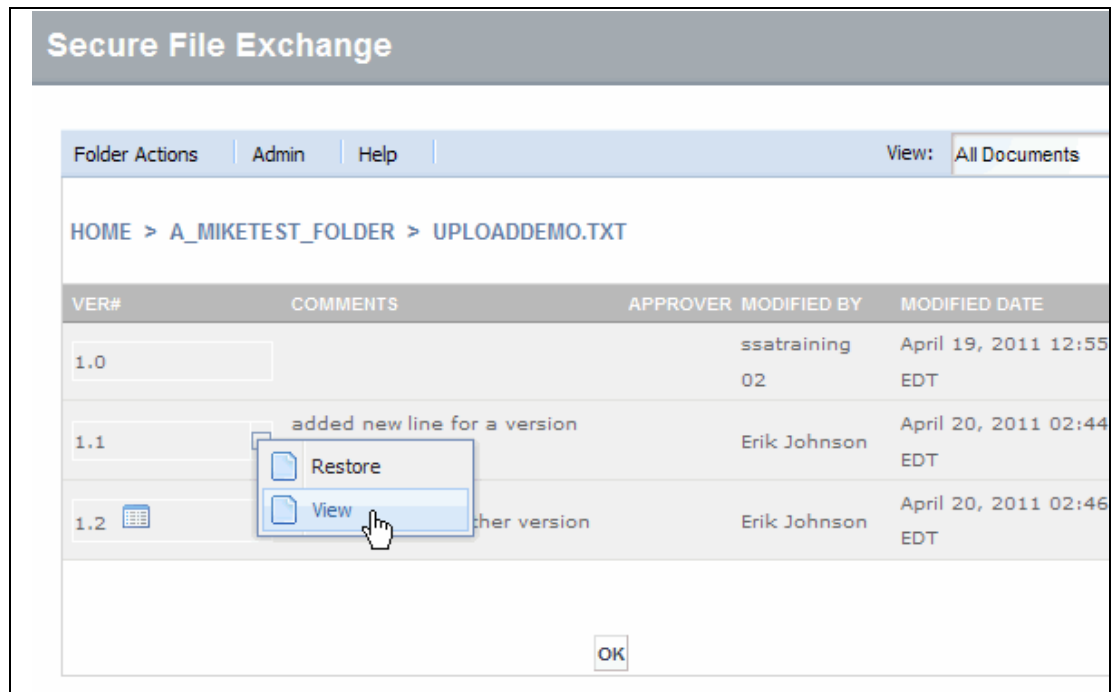
Restoring a Previous Version

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.

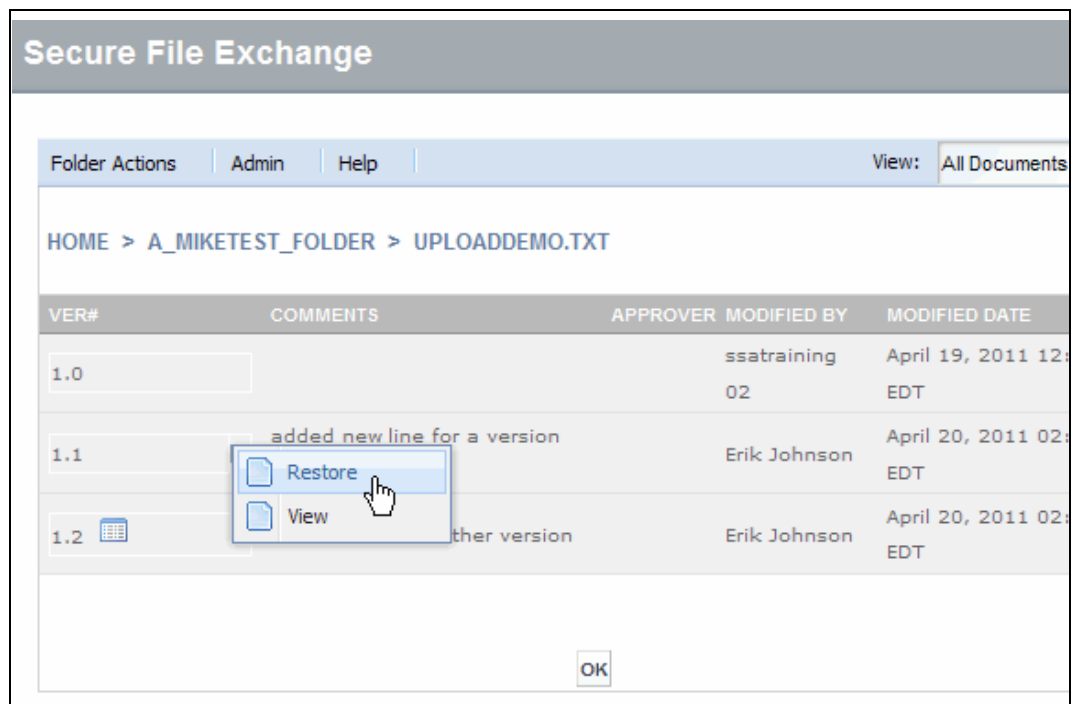


3. Click **Reports -> Version History**. A list of the file versions displays.
4. Click the **drop-down arrow** at the far right of the version number to which you want to restore the file

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.

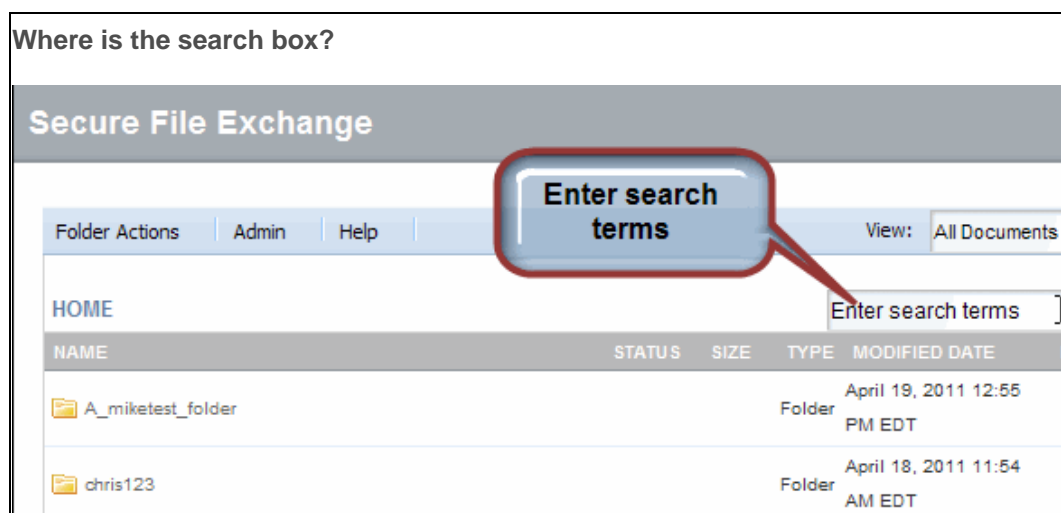
RESULT:

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

upload

NAME	STATUS	SIZE	TYPE	MODIFIED DATE	LOCATION
 Uploaddemo.txt		1KB	.txt	September 28, 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.

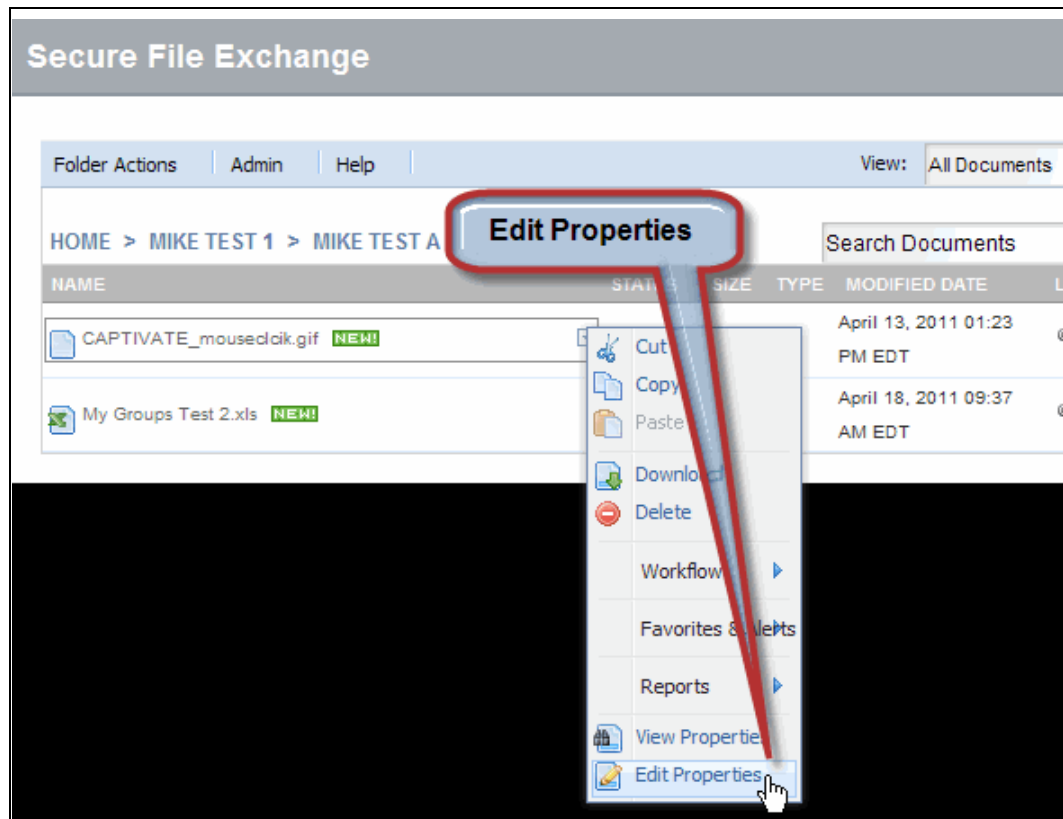
3. From the search results, you can:
 - a. View or download a file by clicking its link in the Name column.
 - b. Navigate to a file by clicking its hyperlink in the Locations column.



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.

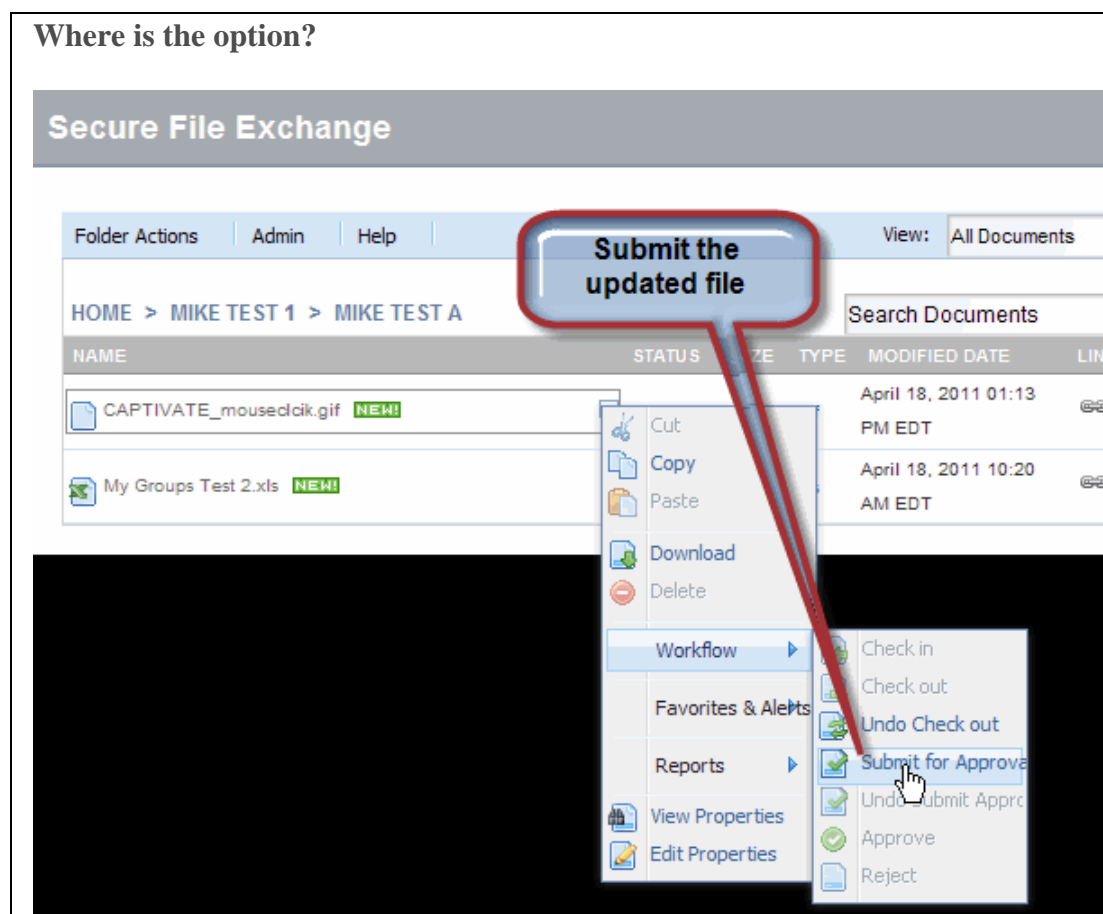
Submitting a Draft for Approval



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.

Secure File Exchange

Folder Actions
Admin
Help
View: All Documents

HOME > MIKE TEST 1 > MIKE TEST A > CAPTIVATE_MOUSECLCIK.GIF


SUBMIT FOR APPROVAL:

USER	COMMENTS	STATE	DATE
Please enter comments:			
<div> Please review and approve the new callout </div> <div> OK CANCEL </div>			

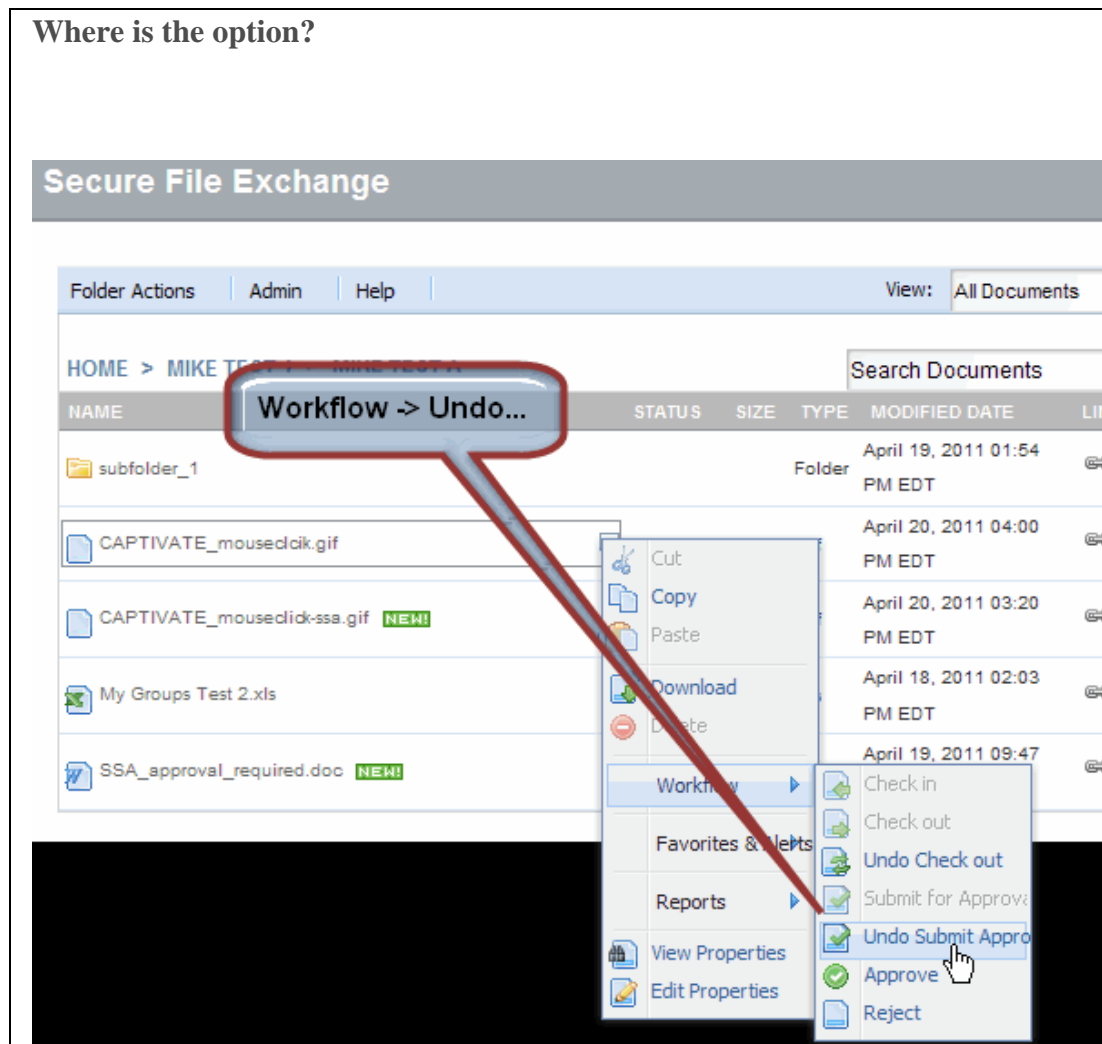
4. Enter comments for the approver.
5. Click **OK**. The file's status is changed to the Pending state. You will receive email notification of the approval decision.

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.

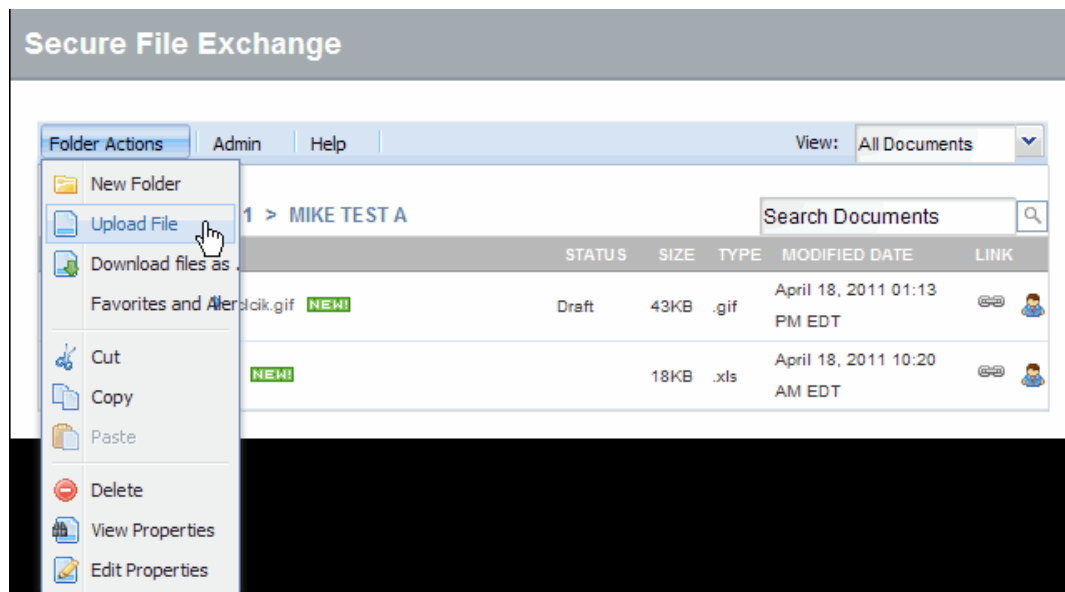
Updating a File

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 >>>**

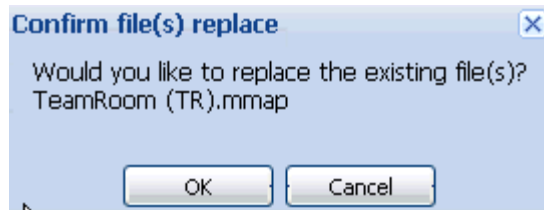


Note: The following special characters are **not allowed** in file names:

/ & : % + ? ; *

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

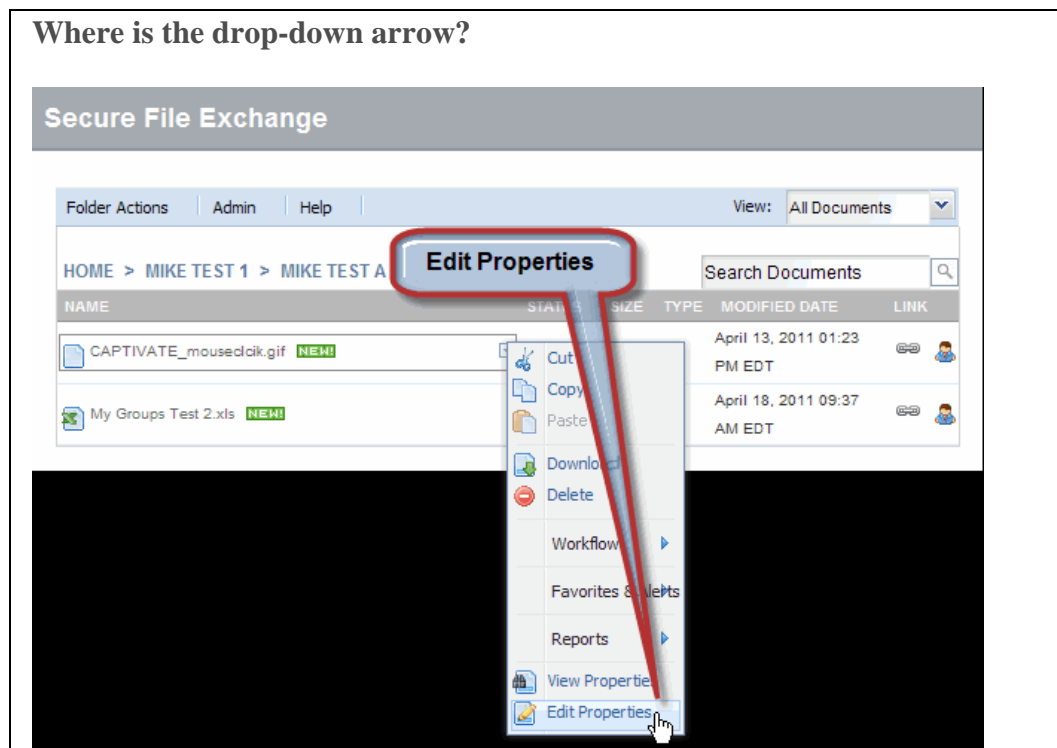
Changing File or Folder Ownership



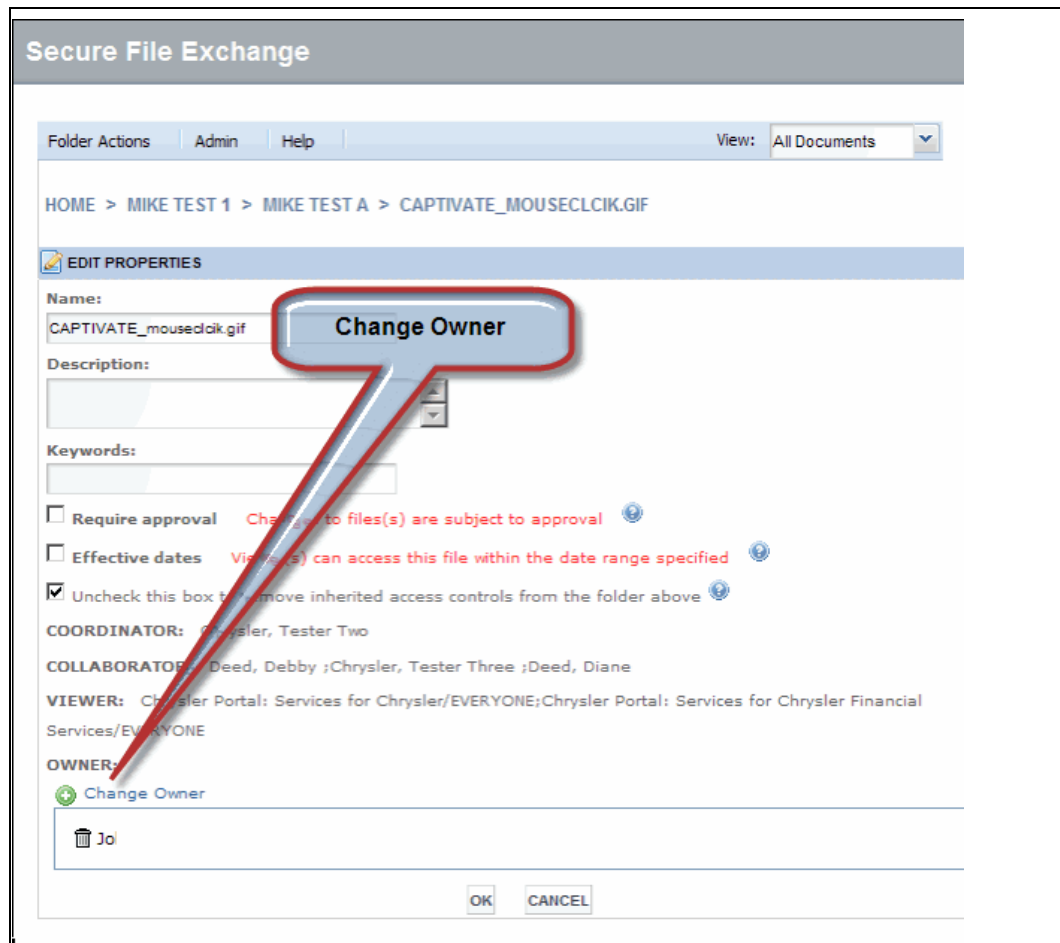
This task can be performed only by an SFX Administrator.

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.



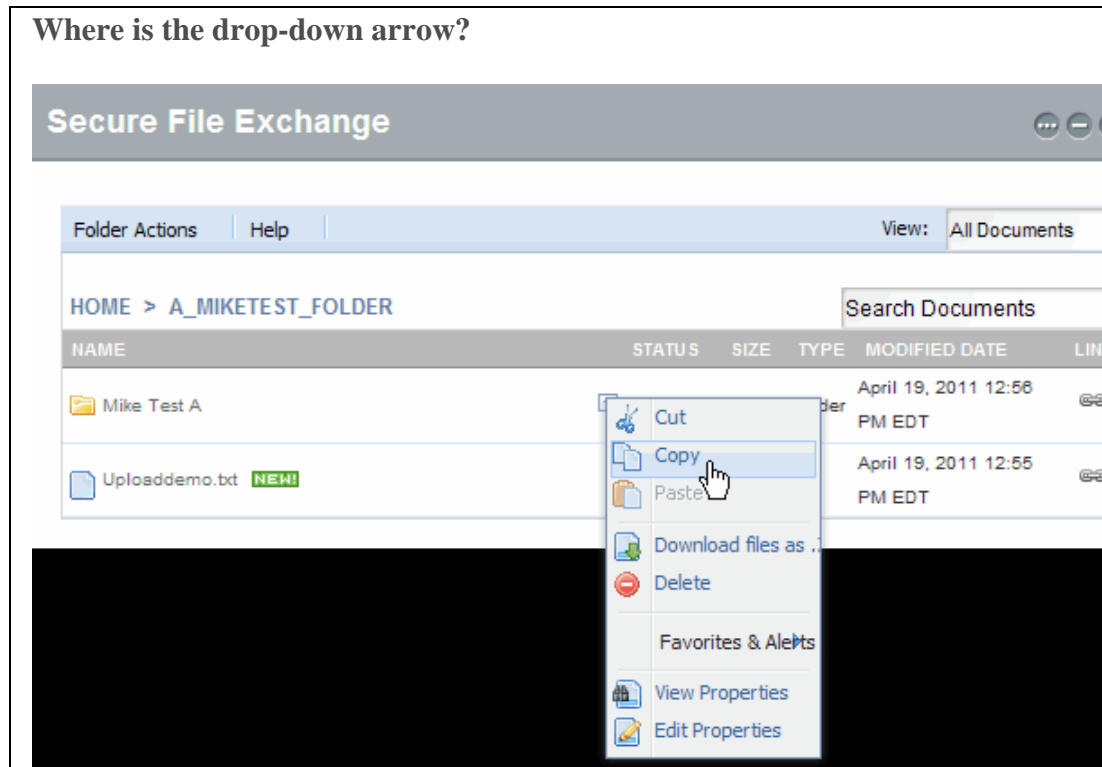
- a. Type the name (or partial name) of the user you want to assign as the item owner in the **Type in name** field.
 - b. If you want to restrict your search to individual users, click the **Include** drop-down arrow and select **Users** from the list.
 - c. Click **Find**. The screen refreshes, and 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:

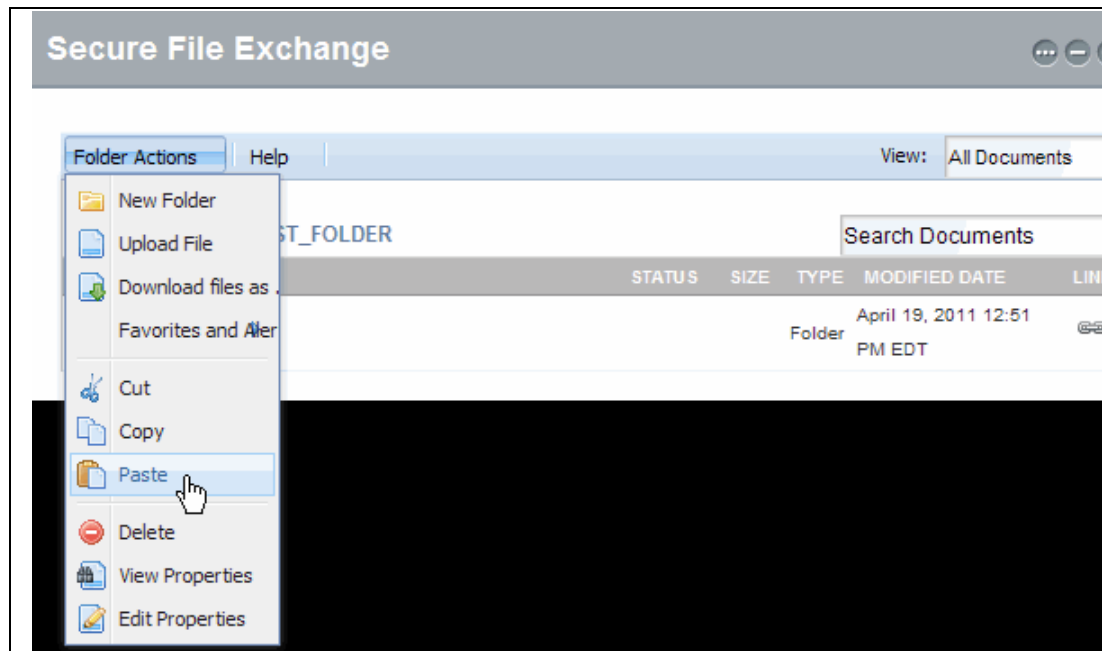
You have successfully changed ownership of a file or folder.

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**.



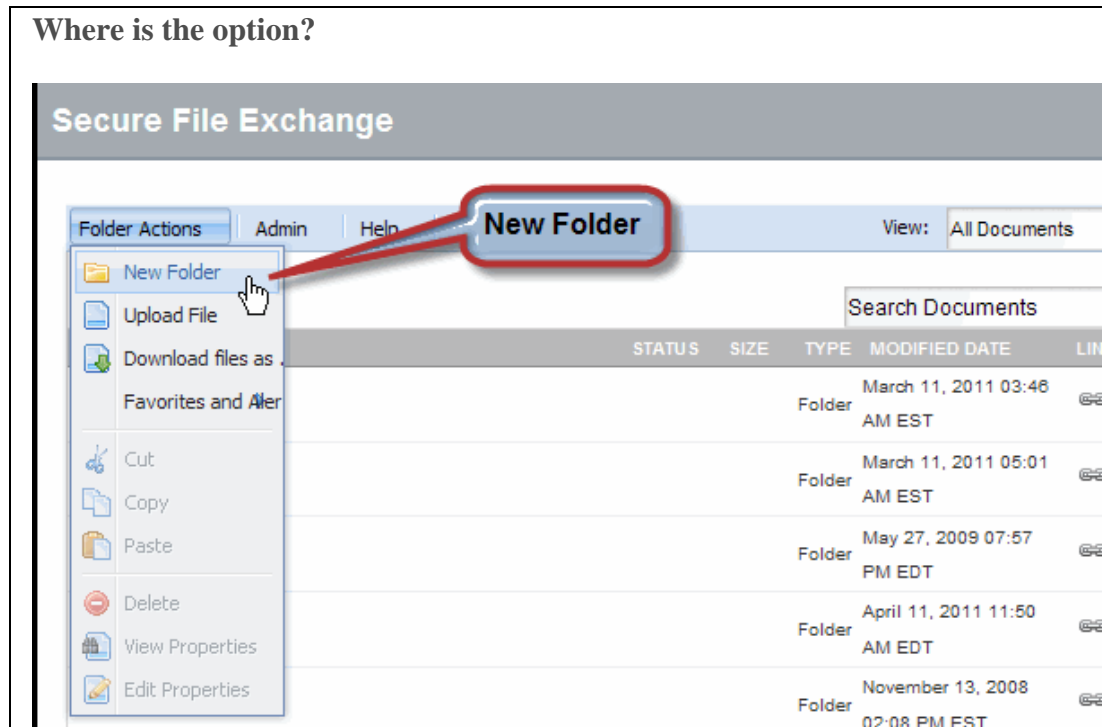
Copying files or folders creates duplicate items. Changes to a file or folder in one location do not apply to copies in other locations.

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 titled "Secure File Exchange". At the top, there are navigation tabs: "Folder Actions", "Admin", and "Help". To the right, there is a "View:" dropdown menu currently set to "All Documents". Below the navigation bar, the word "HOME" is displayed. The main section is titled "CREATE FOLDER" with a folder icon. It contains three input fields: "Name:" with a text box, "Fax number:" with a dropdown menu, and "Description:" with a text box and a small expand/collapse icon. Below these fields, a section titled "FOR ALL FILES WITHIN THIS FOLDER:" contains a checkbox labeled "Require approval". To the right of the checkbox, there is a red text message: "Approval settings on this folder override existing approval settings on files/folders within this folder" followed by a small circular icon. At the bottom right of the dialog are "OK" and "CANCEL" buttons.


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

RESULT:

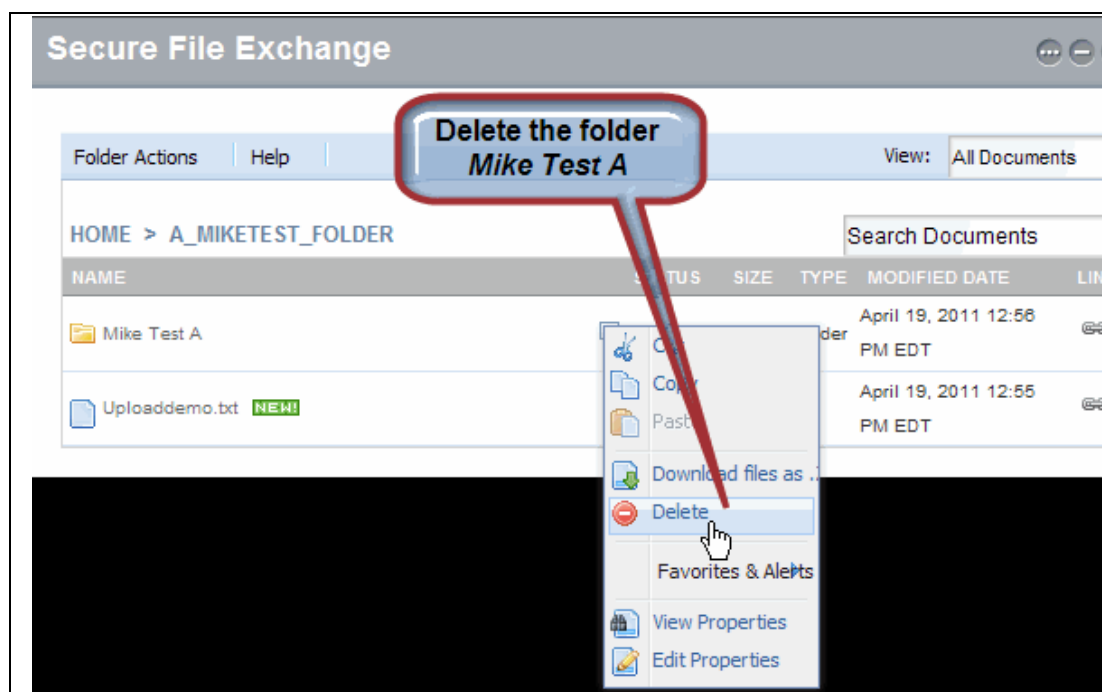
You have successfully created a folder. Next, you may want to:

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

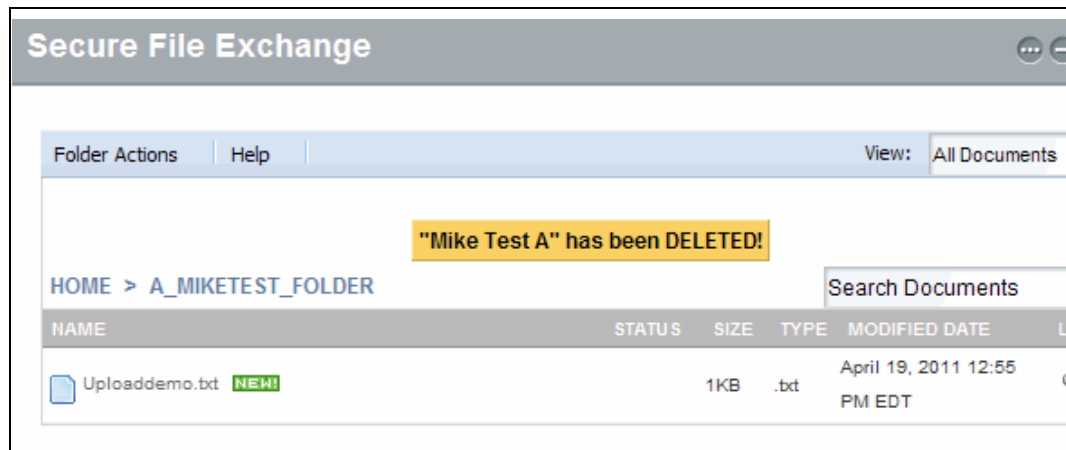
Deleting a Folder

 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.

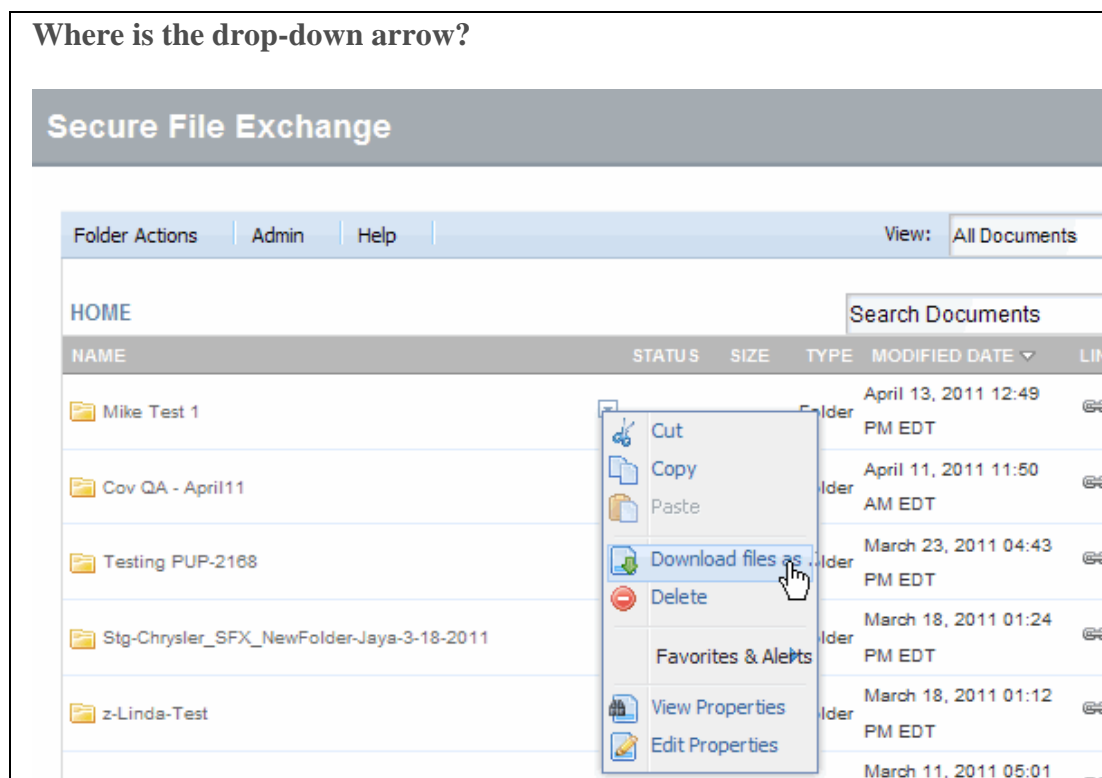
Downloading a Folder and its Files



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:

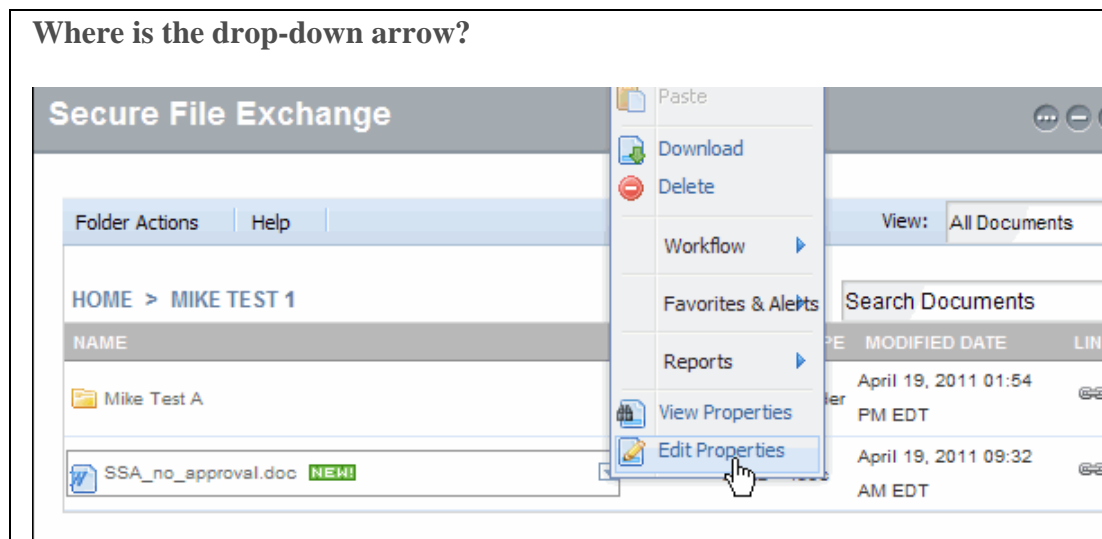
You have successfully downloaded a folder and its contents.

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.

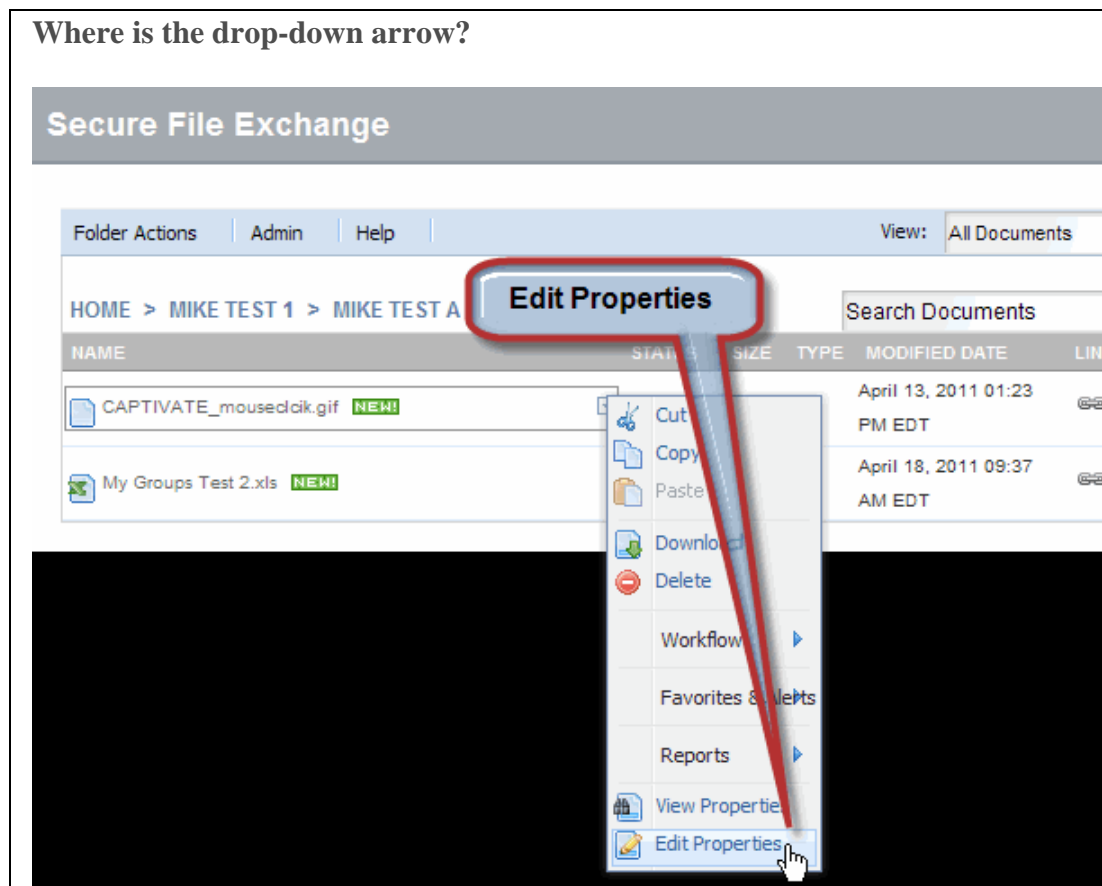
Modifying Access Rights to a File or Folder

 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:
Test2-inheritance

Description:
Tahoma

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

☐ **Require approval** Changes to files(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

OK CANCEL

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⁻**

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:

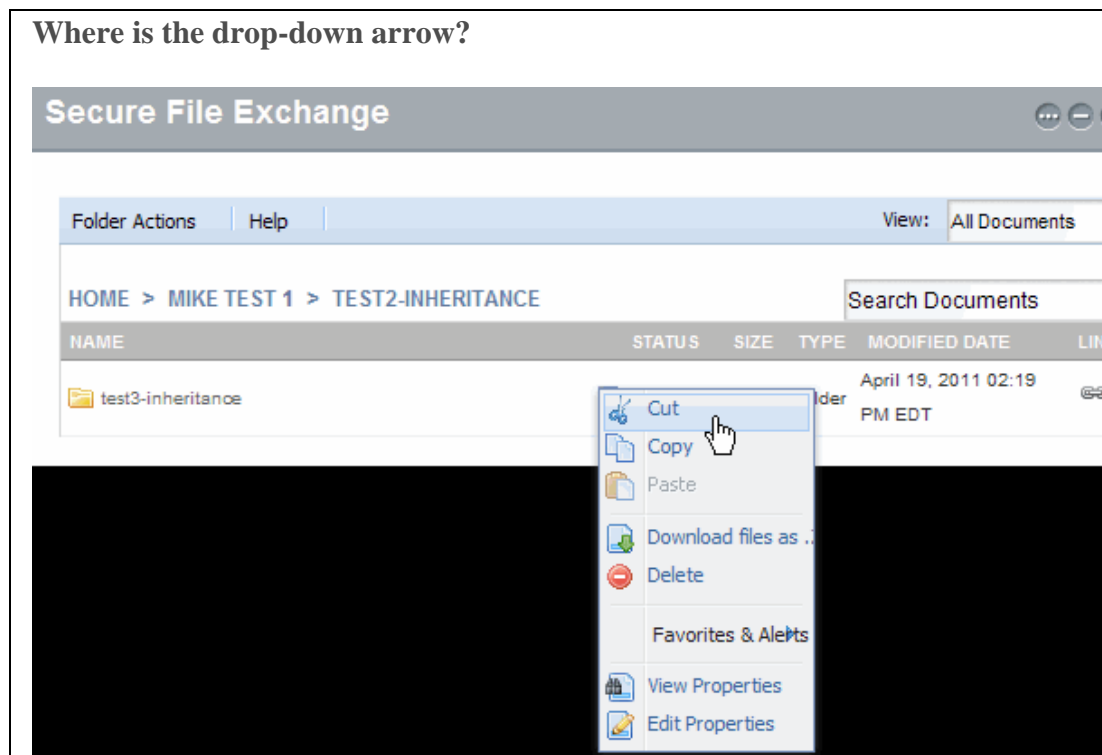
You have successfully modified access rights on an item.

Moving a File or Folder with Cut



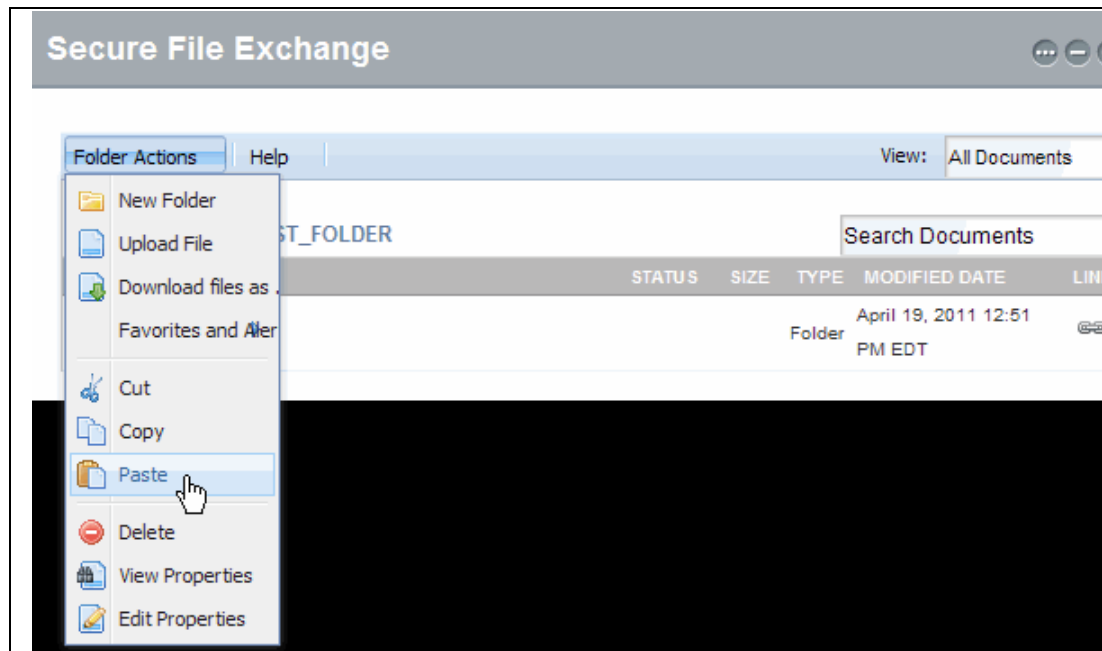
You must be the file or folder owner or have an appropriate role to move a file or folder using Cut.

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**.

Where is the option?

**RESULT:**

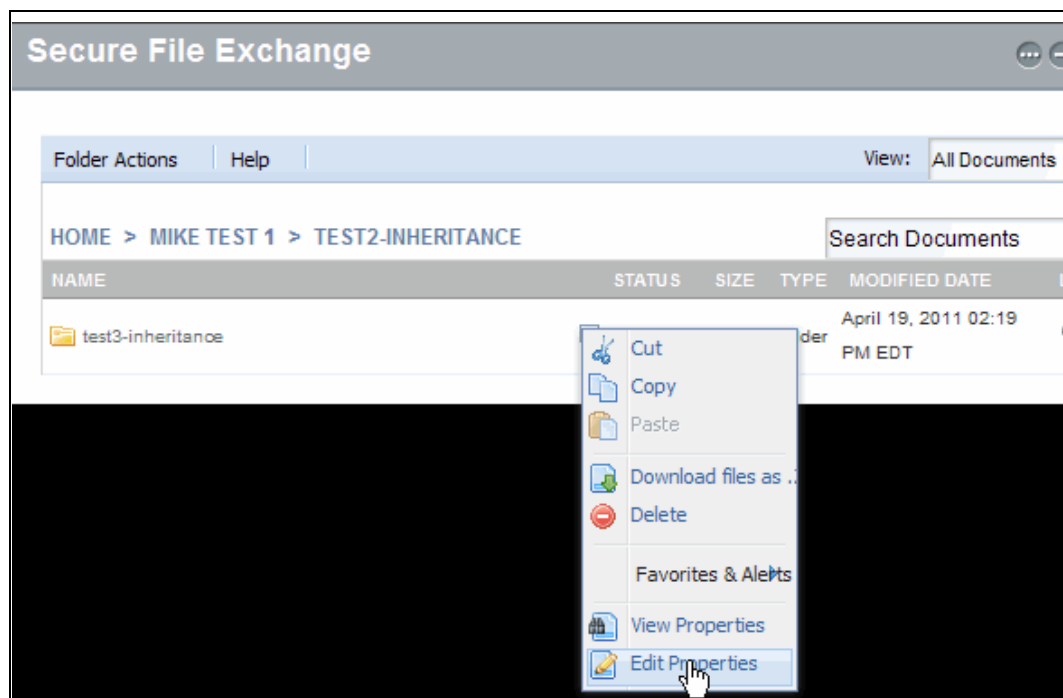
You have successfully cut and pasted a file or folder.

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 Icon:
Select an icon: Browse... Submit

☒ **Require approval** Changes to files(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:

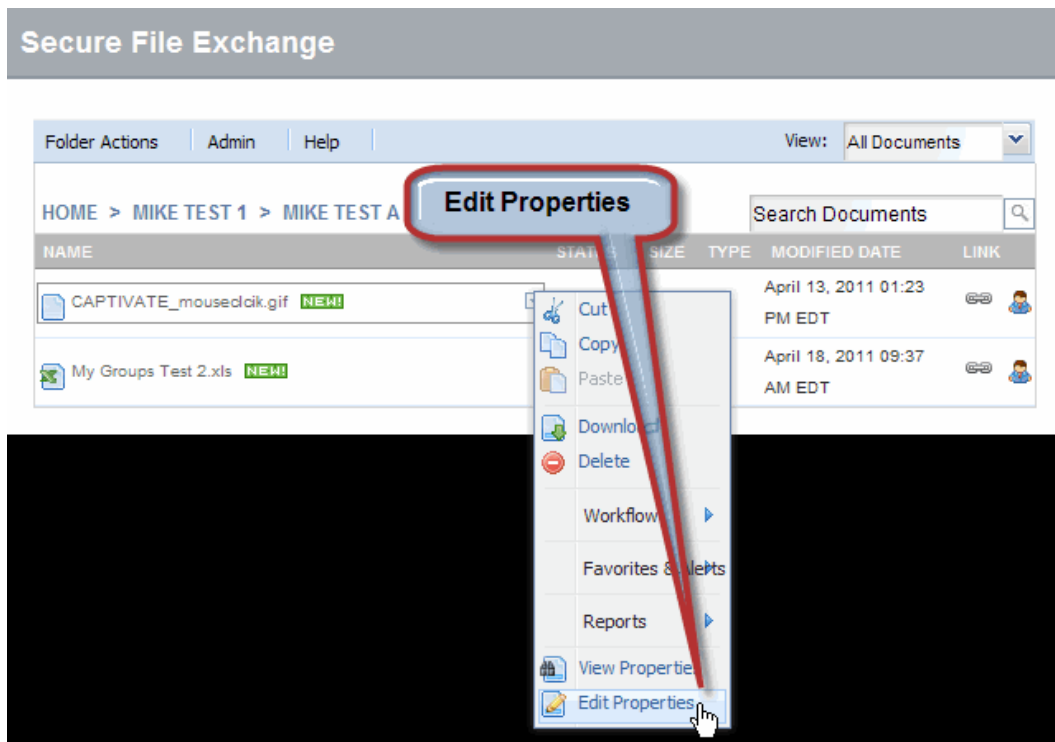
You have successfully required approval on a folder.

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.

Secure File Exchange [Icons]

Folder Actions | Help | View: All Documents

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

EDIT PROPERTIES

Name: test3-inheritance

Description: Tahoma

Upload Custom Icon:
Select an icon: [Field] [Browse...] [Submit]

☒ **Require approval** Changes to files(s) are subject to approval ⓘ
 ⓘ Add Approvers [Field]

☒ 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.

ADMINISTRATION

Assigning Users to Roles in SFX Repository

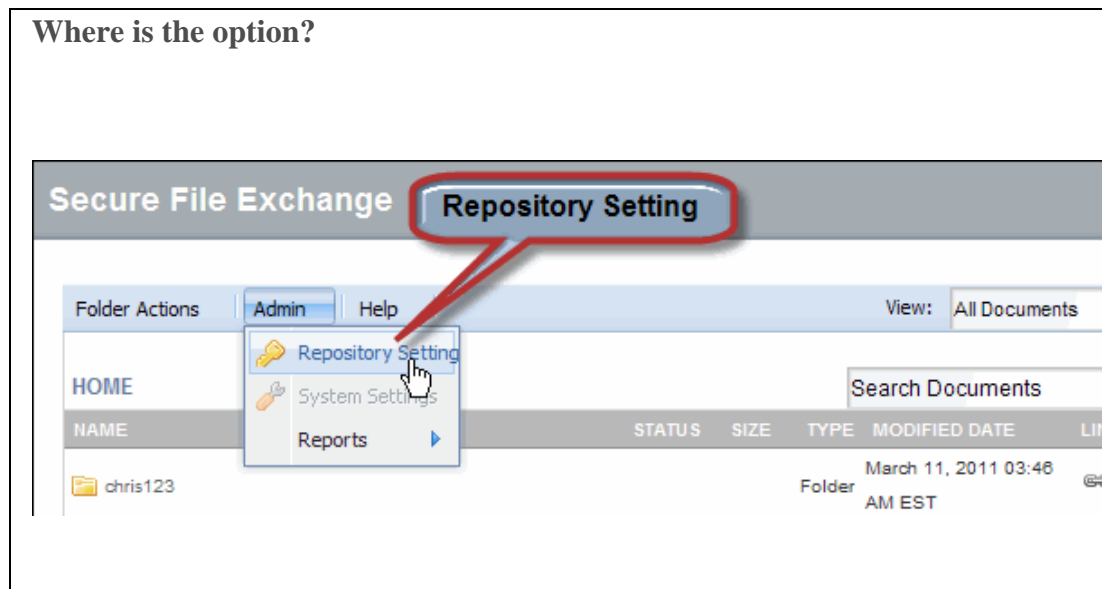



This task can only be performed by an SFX Administrator.

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**.

Where is the option?



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

Secure File Exchange

Folder Actions | Admin | Help | View: All Documents

HOME

REPOSITORY CONFIGURATION SETTINGS

Access Level

A ADMIN:

+ Add Members **Add ADMIN Members**

Financial

CO COORDINATOR:

+ Add Members **Add COORDINATOR Members**

Tester Two

CL COLLABORATOR:

+ Add Members **Add COLLABORATOR Members**

Tester Three

CT CONTRIBUTOR:

+ Add Members **Add CONTRIBUTOR Members**

Tester Four

V VIEWER:

+ Add Members **Add VIEWER Members**

Services for EVERYONE

☐ Require approval

☒ Follow file retention policy

Duration (in days) :

1

☐ Enforce expiry within retention

OK CANCEL

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

User Directory

Type in name: Include: Users Find

Name	Type	Organization
<input checked="" type="checkbox"/> Tester Four	User	
<input type="checkbox"/> Tester One	User	
<input checked="" type="checkbox"/> Tester Three	User	
<input type="checkbox"/> Tester Two	User	
<input type="checkbox"/> Tester, QA	User	

Selected People

☒ Tester Four ☒ Tester Three

Ok Cancel

- 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

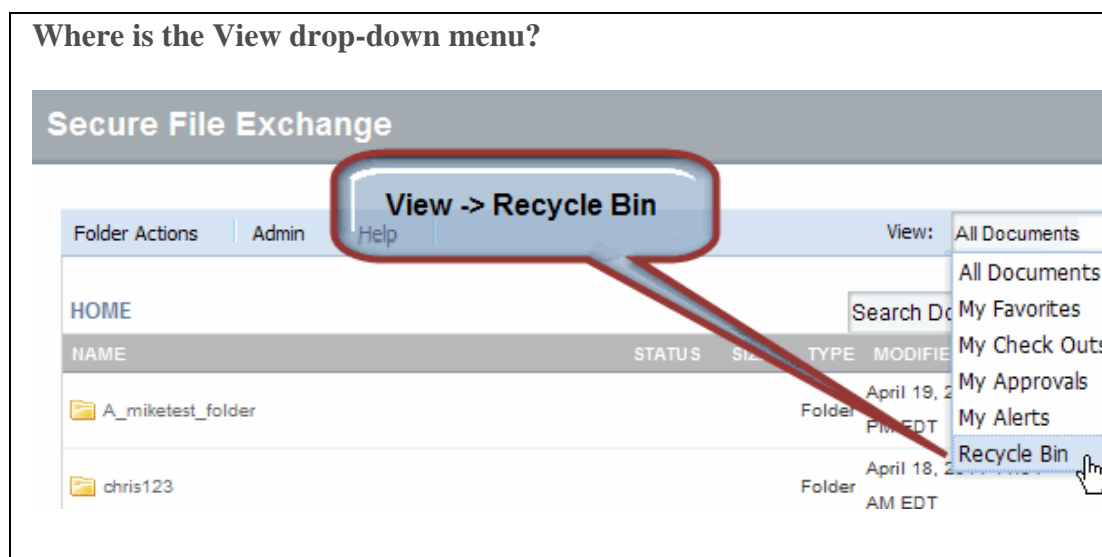
Emptying the Recycle Bin




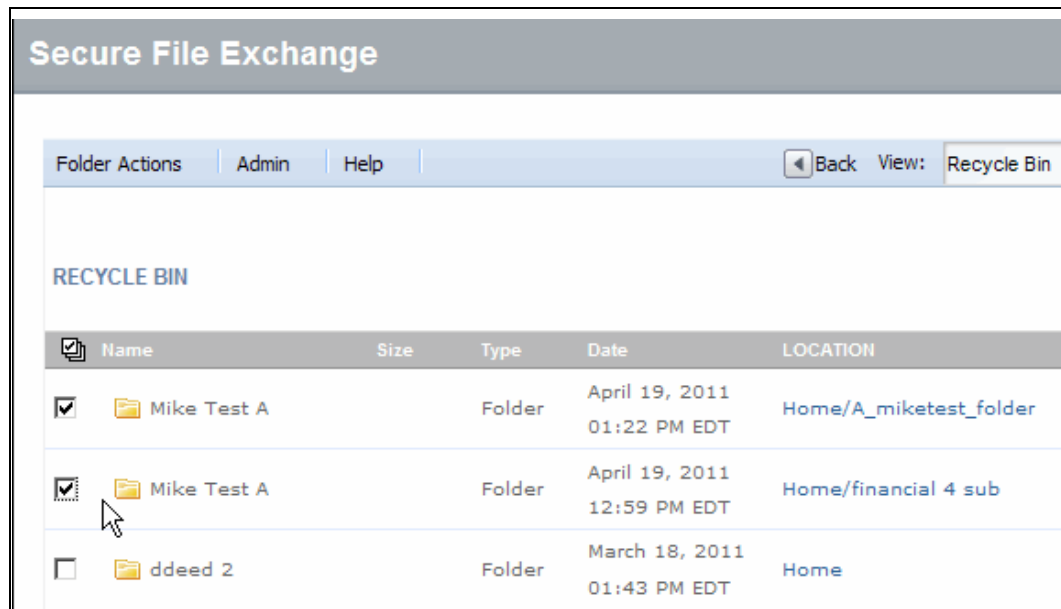
This task can only be performed by an SFX Administrator.

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.

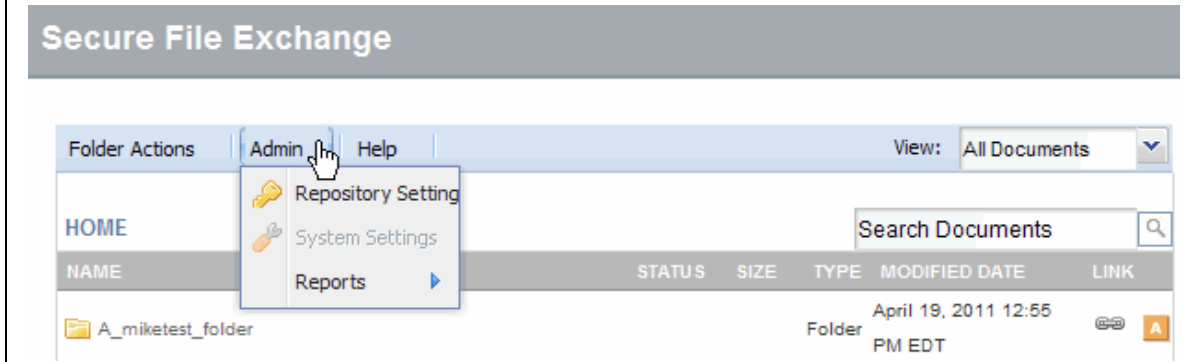
RESULT:

You have successfully emptied the recycle bin.

Managing the Admin Tab

From the **Admin** menu, you can view the following:

Where is the menu?



- **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

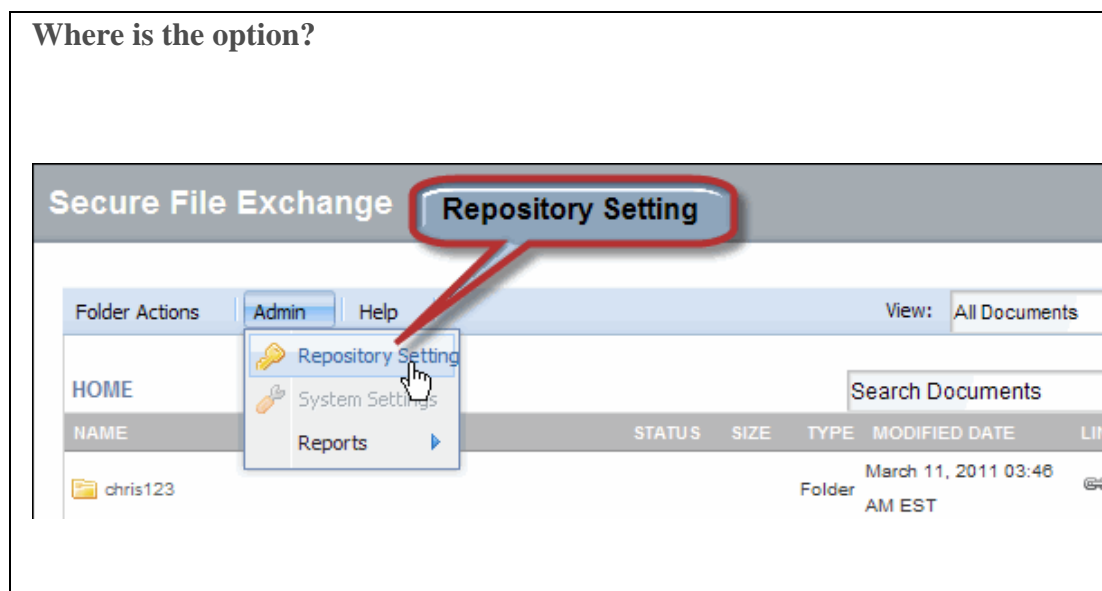



This task can only be performed by an SFX Administrator.

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.

Secure File Exchange

Folder Actions
Admin
Help
View: All Documents

HOME

REPOSITORY CONFIGURATION SETTINGS

Access Level

ADMIN:

Add Members

Klender, Scott , Johnson, Erik , Financial, Fran , Chrysler, Tester One ,
Clar

COORDINATOR:

Add Members

Tester Two

COLLABORATOR:

Add Members

Dee
Tester Three

CONTRIBUTOR:

Add Members

Vie
Tester Four

VIEWER:

Add Members

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

☐ Require approval
☒ Follow file retention policy
Duration (in days) :

1

☐ Enforce expiry within retention

OK
CANCEL

3. Click **OK**.

RESULT:

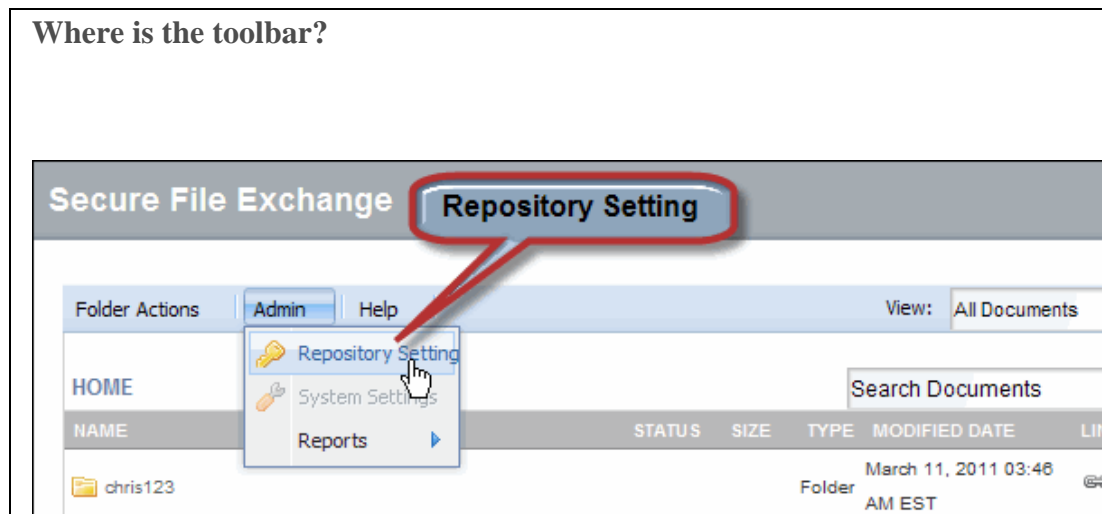
You have successfully removed users from roles in SFX.


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:

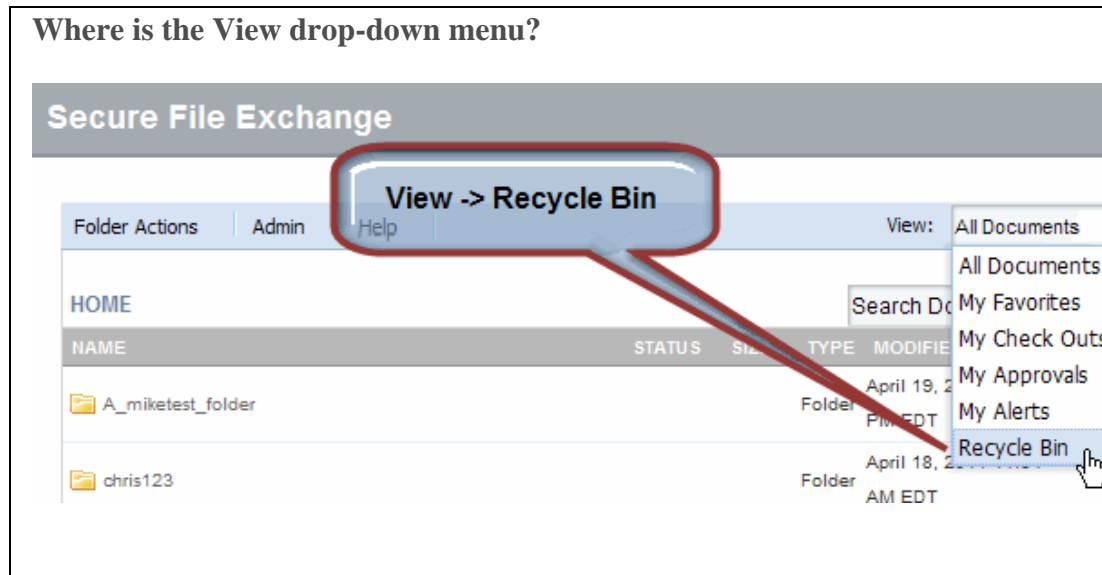
You have successfully added approvers for all files/folders in SFX.


Restoring from the Recycle Bin

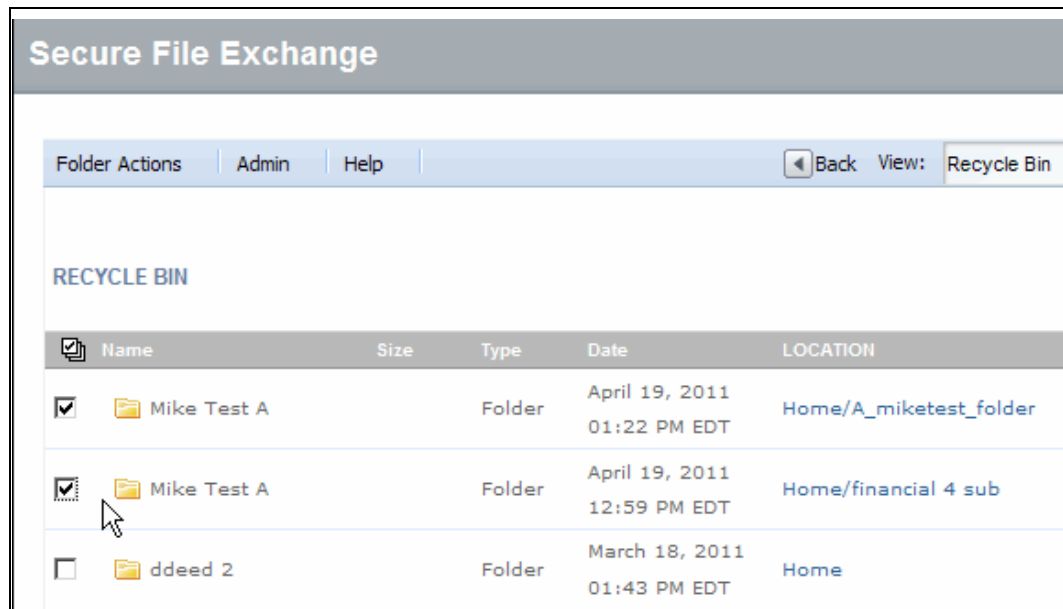


This task can only be performed by an SFX Administrator.

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:

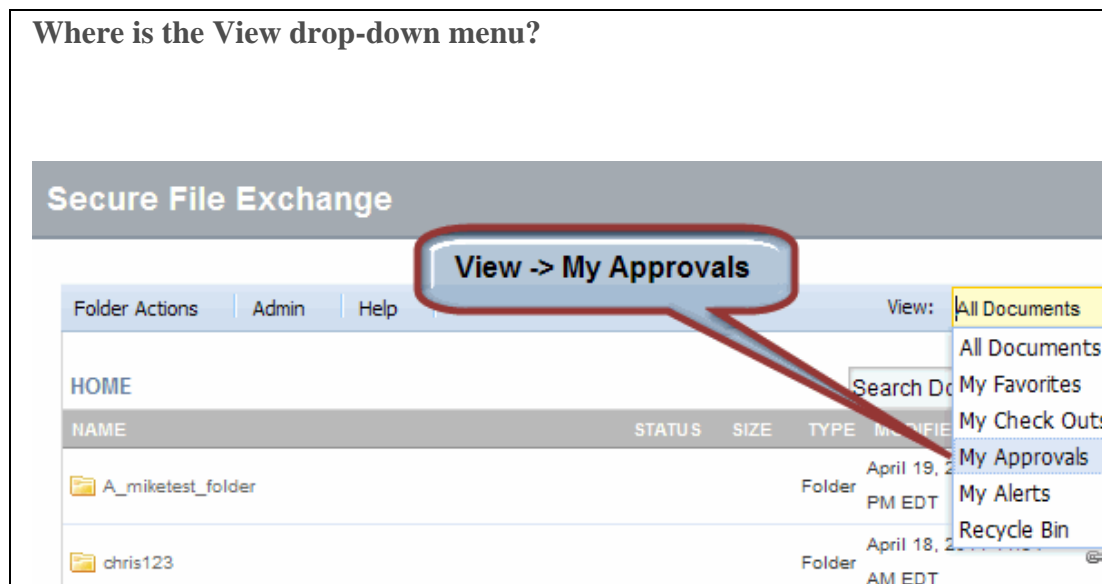
You have successfully restored items from the recycle bin.

WORKFLOW

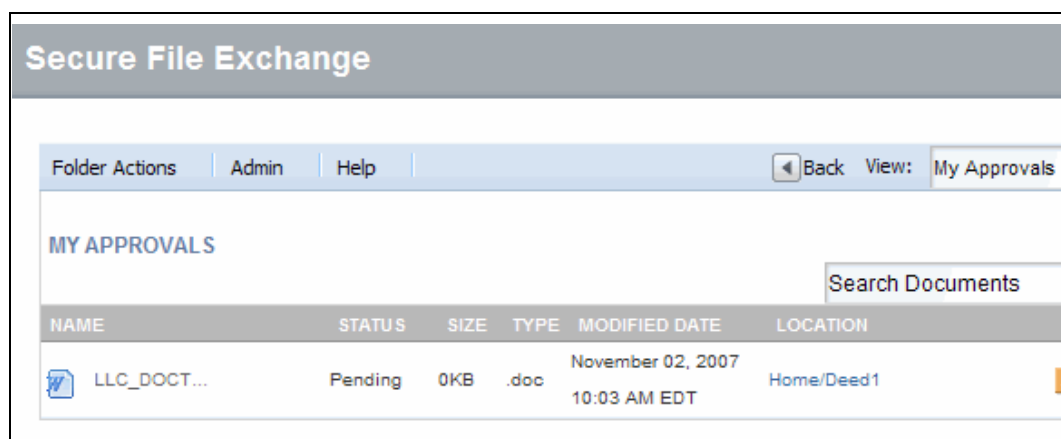
Approving a Pending Draft File

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

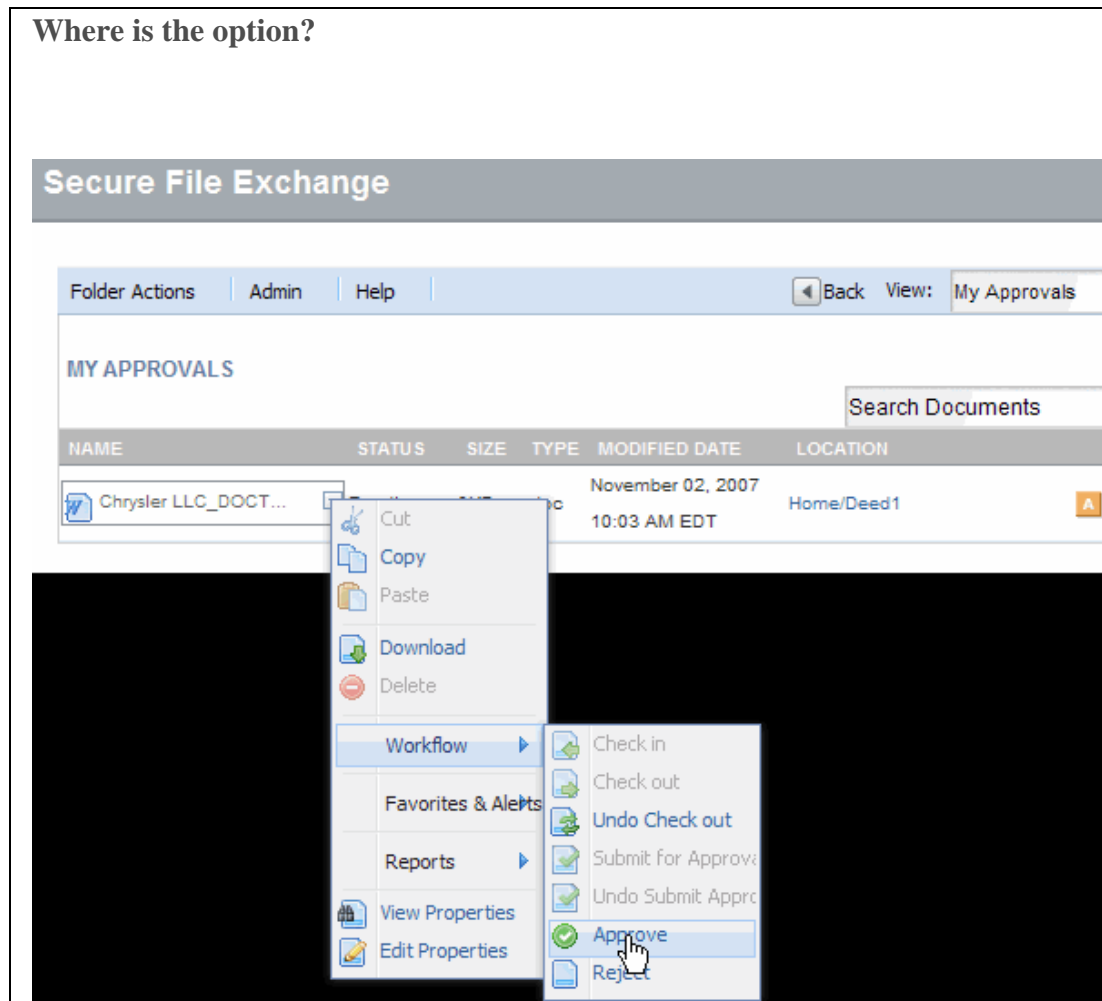
1. Click **My Approvals** from the **View drop-down menu**. The list of "Pending" files for which you are an approver displays.



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.

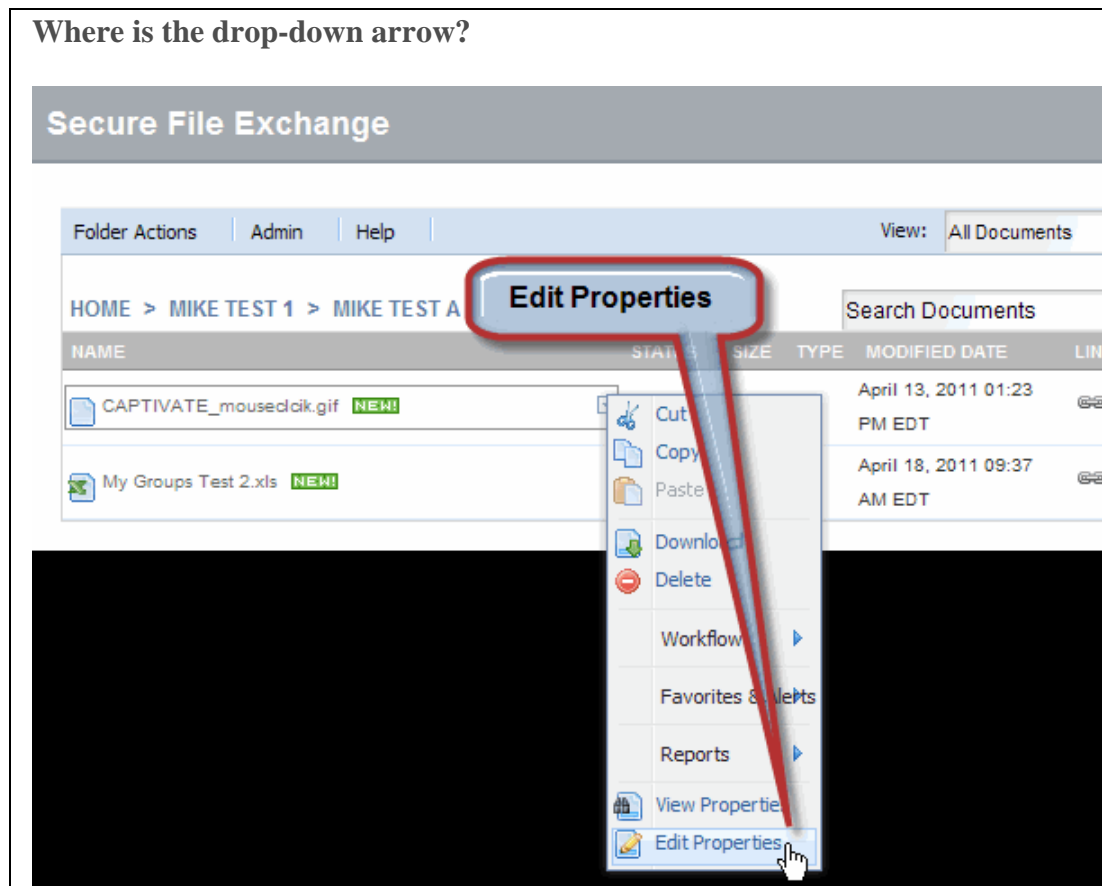
Modifying Access Rights to a File or Folder

-  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⁻**

Upload Custom Icon:
Select an icon:

☐ **Require approval** Changes to files(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.

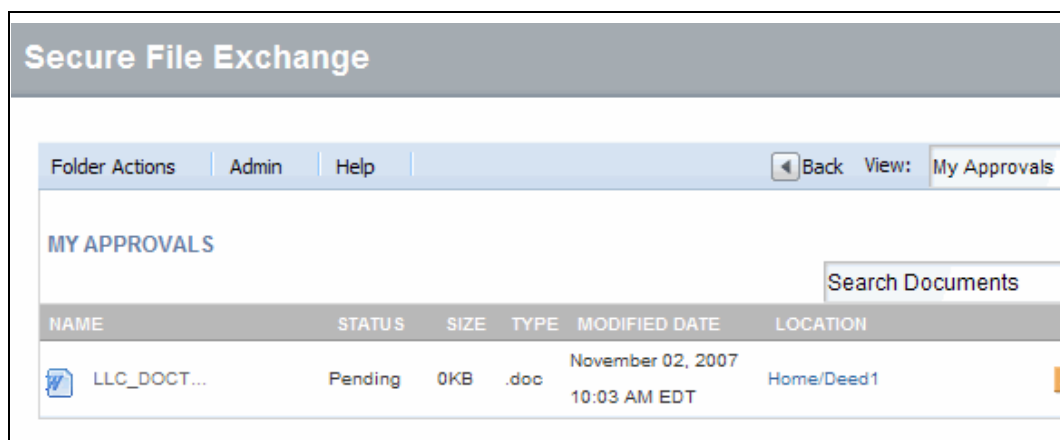
Rejecting a Pending Draft File

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

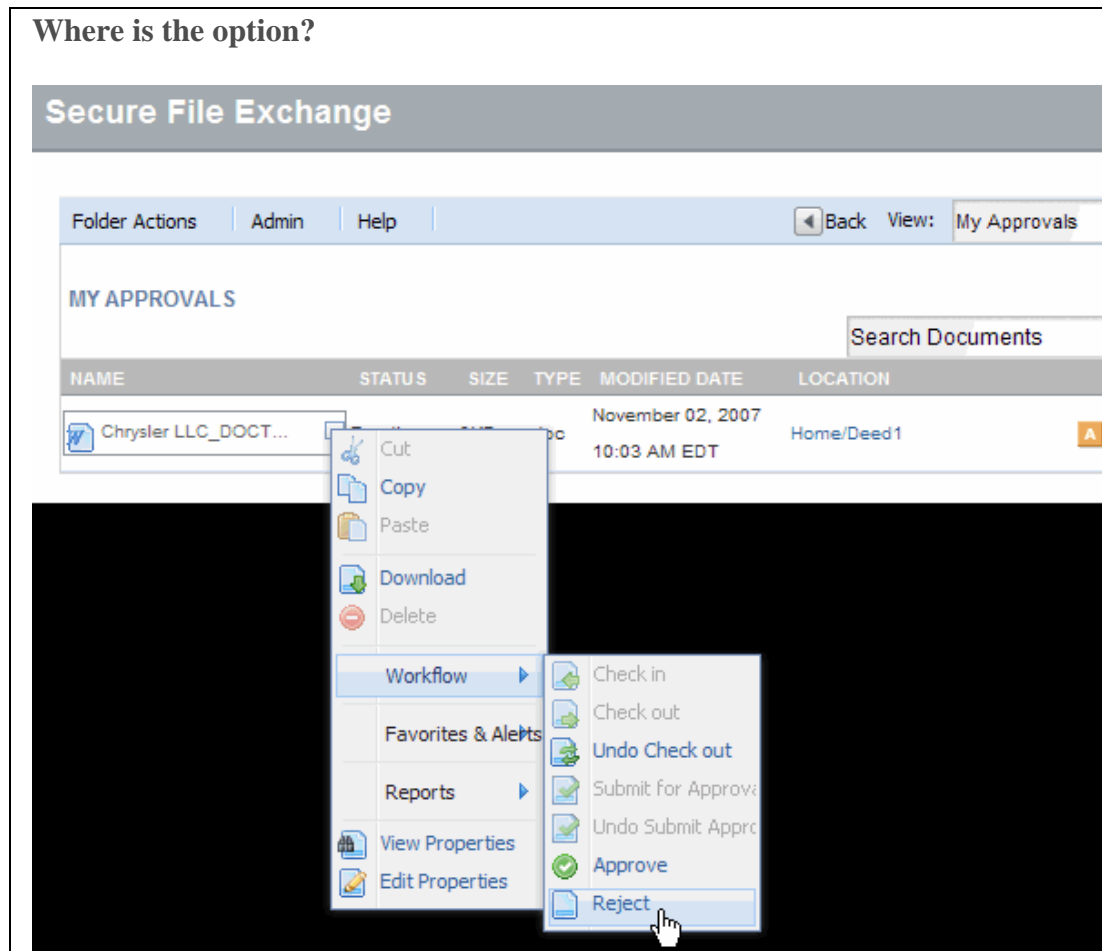
1. Click **My Approvals** from the **View** drop-down menu. The list of "Pending" files for which you are an approver displays.



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

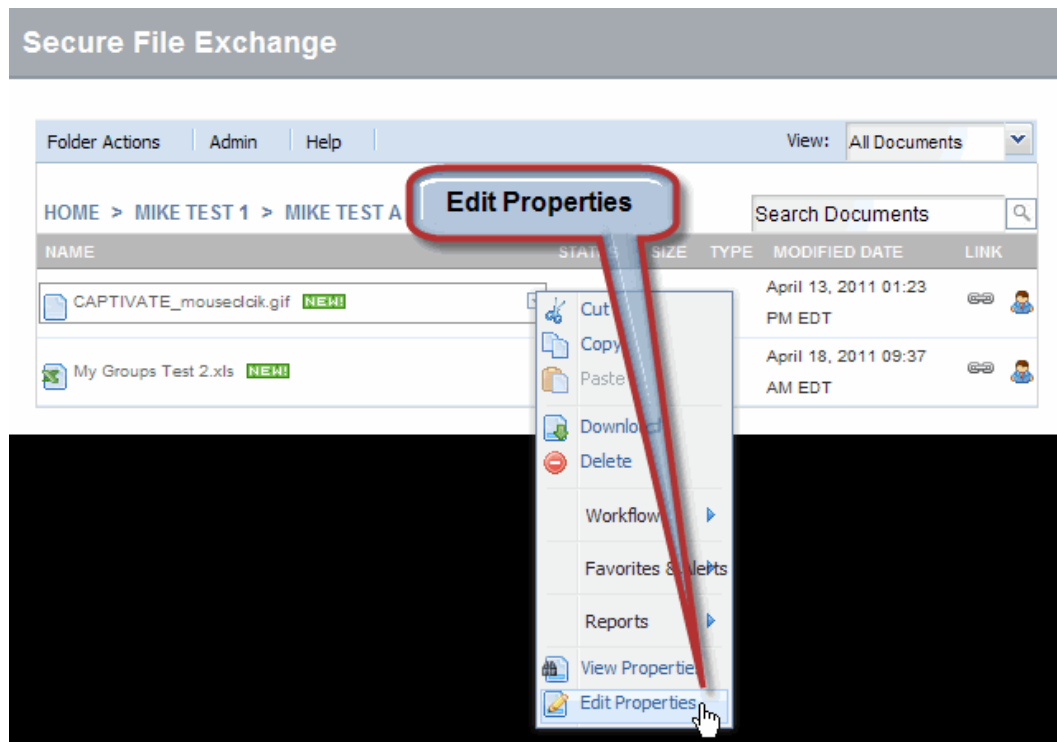
Refer to Modifying Access Rights to remove Approvers from a File or Folder

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 files(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

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

RESULT:

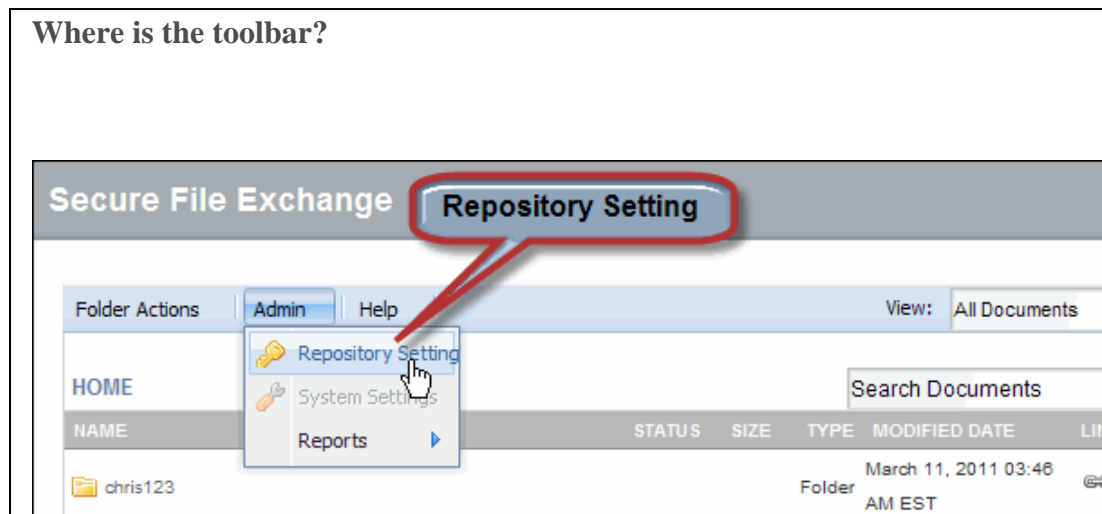
You have successfully removed approval requirements from a folder or file.


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:

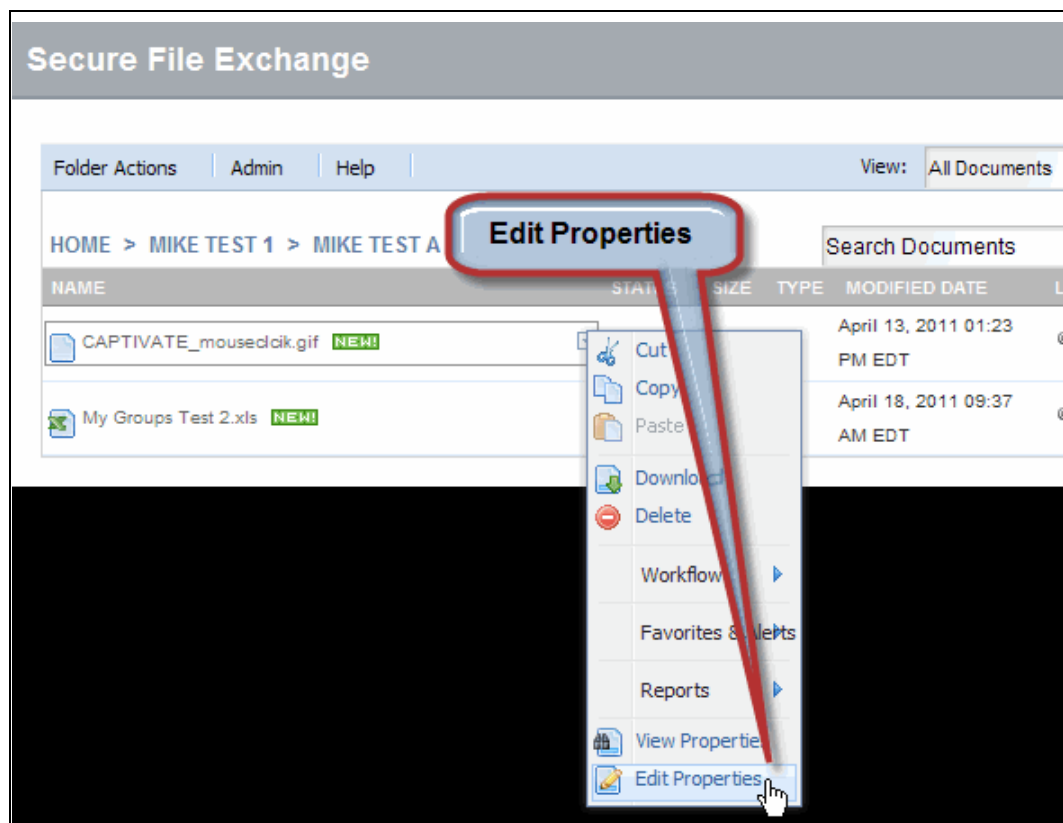
You have successfully added approvers for all files/folders in SFX.

Requiring File Approval

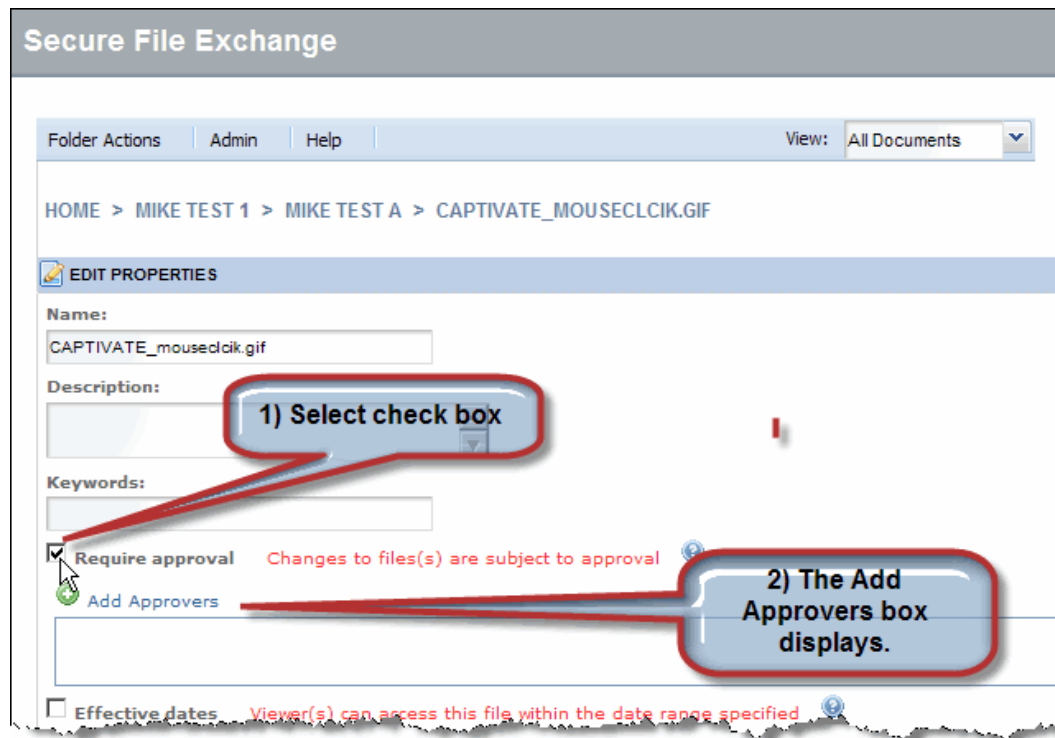
If your SFX Administrator configures all items in the repository to require approval, approvers are established at the repository level for all folders and files within the repository. You cannot turn off approval workflow for your items, and you cannot select your own approvers.


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_mousedclcik.gif" properties have been UPDATED !

HOME > MIKE TEST 1 > MIKE TEST A

Search Documents

NAME	STATUS	SIZE	TYPE	MODIFIED DATE	
 CAPTIVATE_mousedclcik.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:

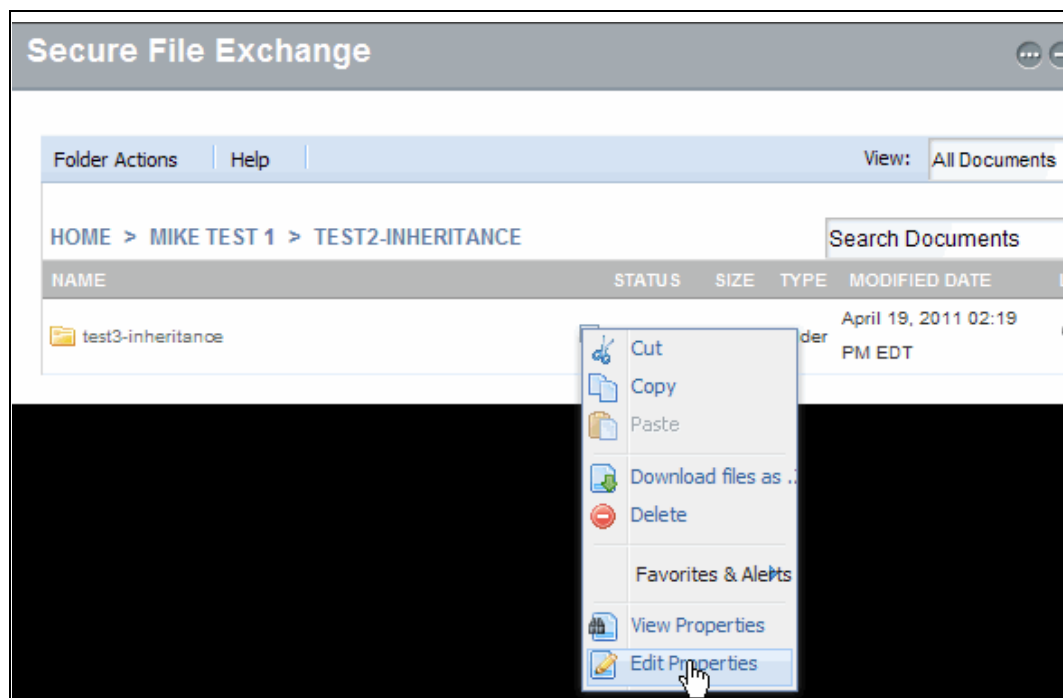
You have successfully required approval on a file.

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 Icon:
Select an icon: Browse... Submit

☒ **Require approval** Changes to files(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.