

Secure File Exchange End-User Web Access

The Secure File Exchange (SFE) End User Web Access interface enables end-users to exchange and share sensitive information. Using this interface, end-users can access files that are transferred to them, or transfer new files to the other party. The interface provides both the ability to send or receive data in file-transfer processes (via Services) or to share documents in a collaborative manner (via Workspaces).

This document introduces you to the SFE End User Web Access and guides you through the following main tasks:

- Logging on to the SFE
- Self-registering as an endpoint user
- Working with files in Services and Workspaces
- Managing upload and download operations in the My Transfer Manager (MTM)

Logging on to the SFE

In order to create or initiate SFE services, you must first log onto the SFE. The SFE offers several authentication options for logging on to the Vault. For detailed information about each authentication method, see the SFE End User Web Access User Guide.

Authenticating to the SFE

1. In your browser, type the following URL: `http://<host name>/SFE`
The main SFE logon window appears.
2. Select the authentication method that you will use to authenticate to the Vault; depending on the method you selected, the relevant logon window appears.



3. If you are using CyberArk Authentication, you can log onto the Vault with a password that the Vault Administrator has defined for you in the Vault. Type your CyberArk user name and password in the appropriate fields and then click Logon; the Vault authenticates your information and grants you access to the Vault.

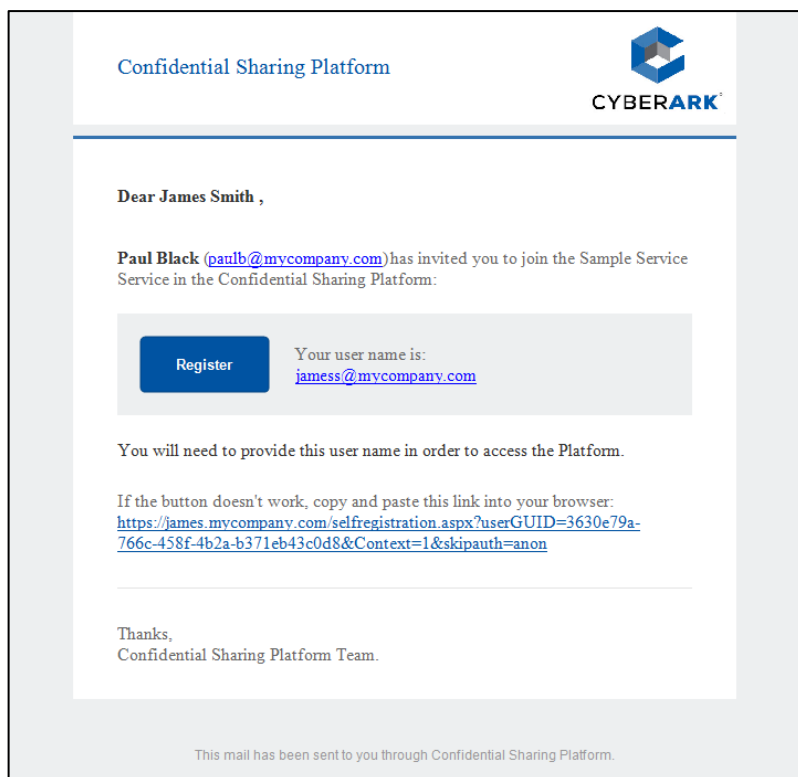
If you are using a different authentication method, see the SFE End User Web Access User Guide for more information.

First Time? Registering as an SFE Endpoint User

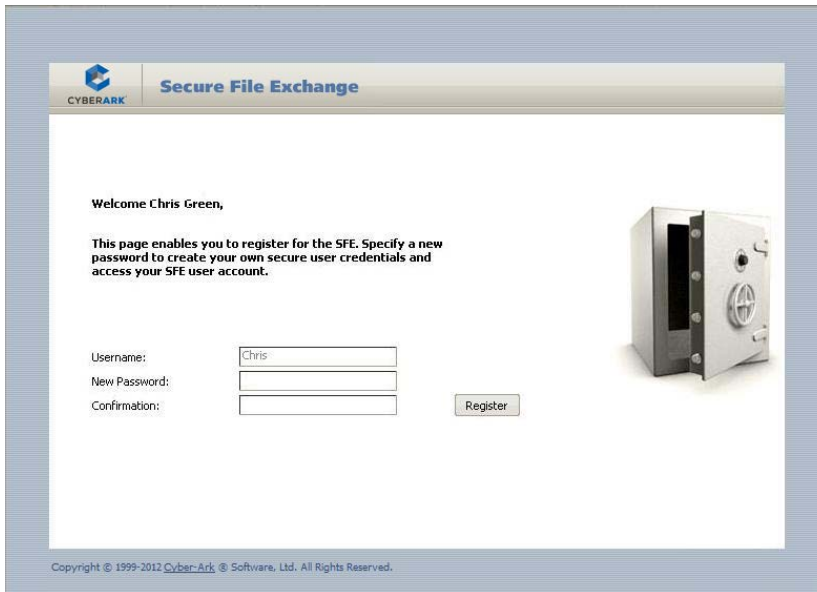
Users who are added to Services as self-registering Endpoint users receive an email from the SFE that invites them to access the SFE logon page and register as users.

1. Click the link to access the SFE registration page.

Note: If you did not receive this email invitation, contact the business owner who initially invited you to register to the SFE and request another invitation so that you can complete your self-registration.



In the registration page, note that your username has already been specified.



Welcome Chris Green,

This page enables you to register for the SFE. Specify a new password to create your own secure user credentials and access your SFE user account.

Username:

New Password:

Confirmation:

Copyright © 1999-2012 Cyber-Ark ® Software, Ltd. All Rights Reserved.

2. Specify a password, then confirm it
3. Users who are required to specify a shared secret, as a part of the registration process, are required to do so now.
4. Click **Register** to finalize the registration process.

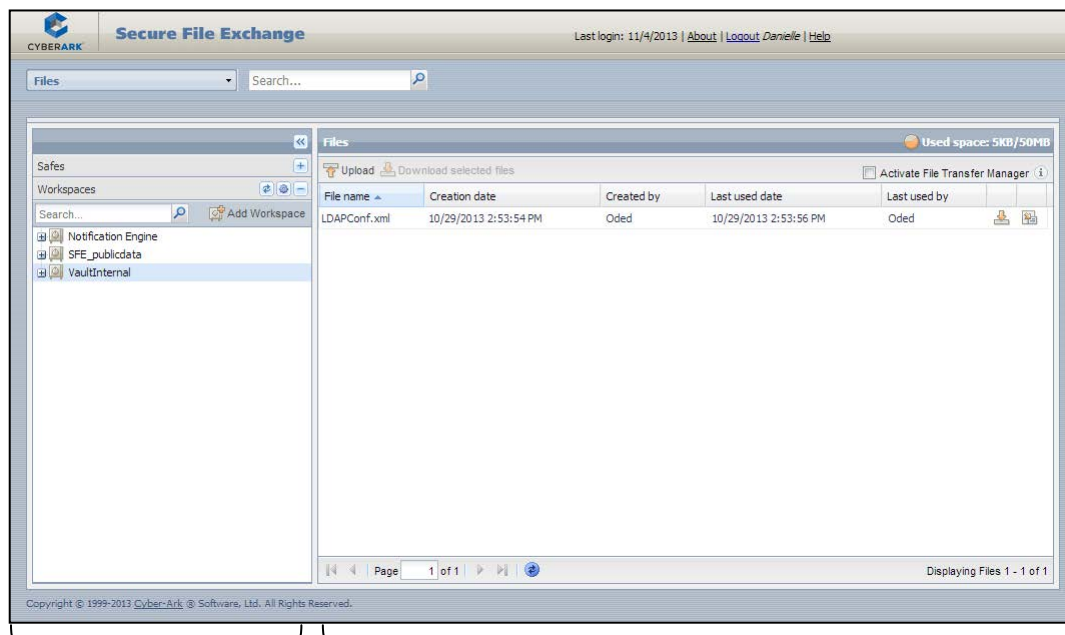
Working with Files

The End User Web Access interface enables you to see SFE Services and Workspaces, which you can access from remote locations.

This page is divided into two sections, as shown in the screen below:

- The **Safes/Workspaces panel** - Displays the Services, Safes and folders to which you have access.
- The **Files grid** - Displays the files that you can access, and a summary of details for each file.

Depending on the SFE configuration, you can see either the Safes (Services) panel or the Workspaces panel, or both.



Workspaces panel

Files grid

Uploading a File

You can upload files to the SFE in the following ways:

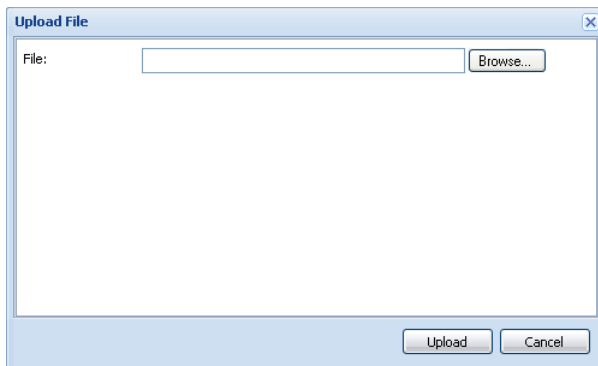
- Using the Upload File window
- Using drag and drop

To Upload a File

1. In the Safes/Workspaces panel, select the folder in which the uploaded file will be stored, then do either of the following.

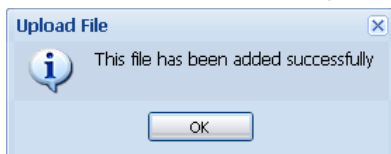
Using the Upload File window:

- i. In the Files grid, on the toolbar, click **Upload**; the Upload File window appears.



- ii. Click **Browse**, then select the file to upload.
- iii. Click **Upload** to upload the file.

When the file has been uploaded, a confirmation message appears.



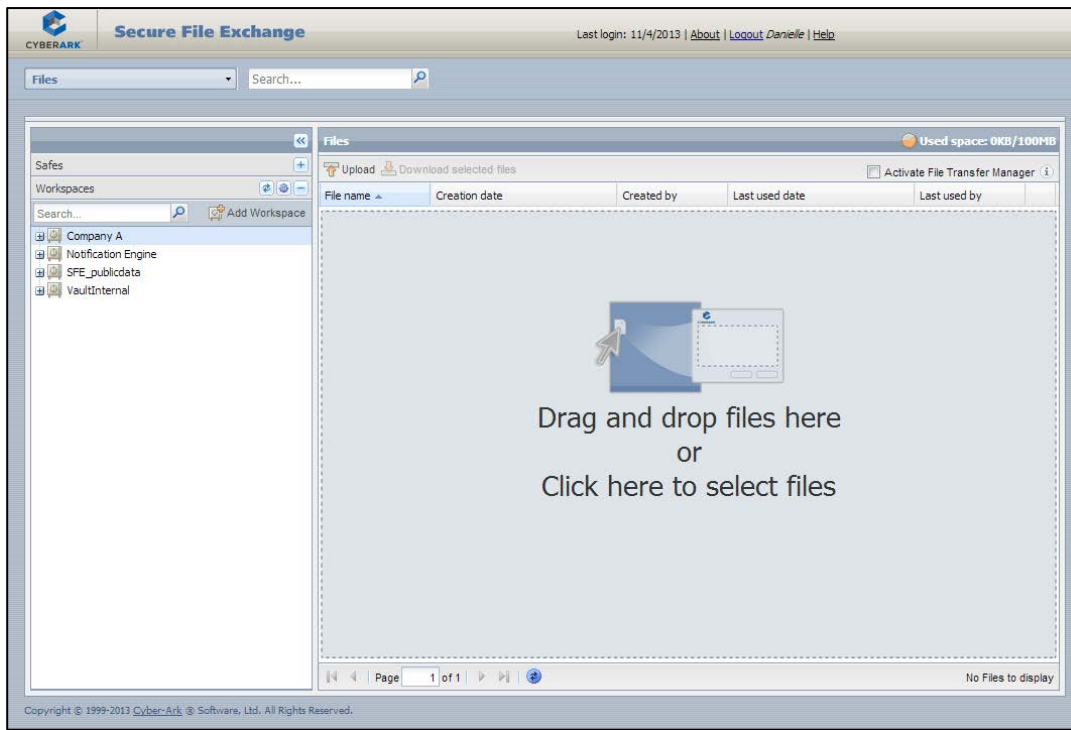
- iv. Click **OK**; you can now access the file from the Files grid.

Note: To manage file uploads and track the upload process, enable My Transfer Manager. For more information, refer to *Managing Single and Multiple Upload/Download Operations*, page 10.



Using drag and drop:

- i. Select the file to transfer, then drag and drop the file into the Files grid.



- ii. The SFE uploads the file into the selected folder. A progress bar appears indicating the status of the file upload.

While a file is being uploaded, it is displayed in the Files grid but cannot be downloaded. A file that is being uploaded is displayed in grey and italicized. After it has been uploaded successfully, it is displayed in black and can be accessed.

Note: You can store up to 100 files in the SFE by dragging and dropping them. To store more than 100 files at once, use My Transfer Manager. For more information, refer to *Managing Single and Multiple Upload/Download Operations*, page 10.

Accessing Files

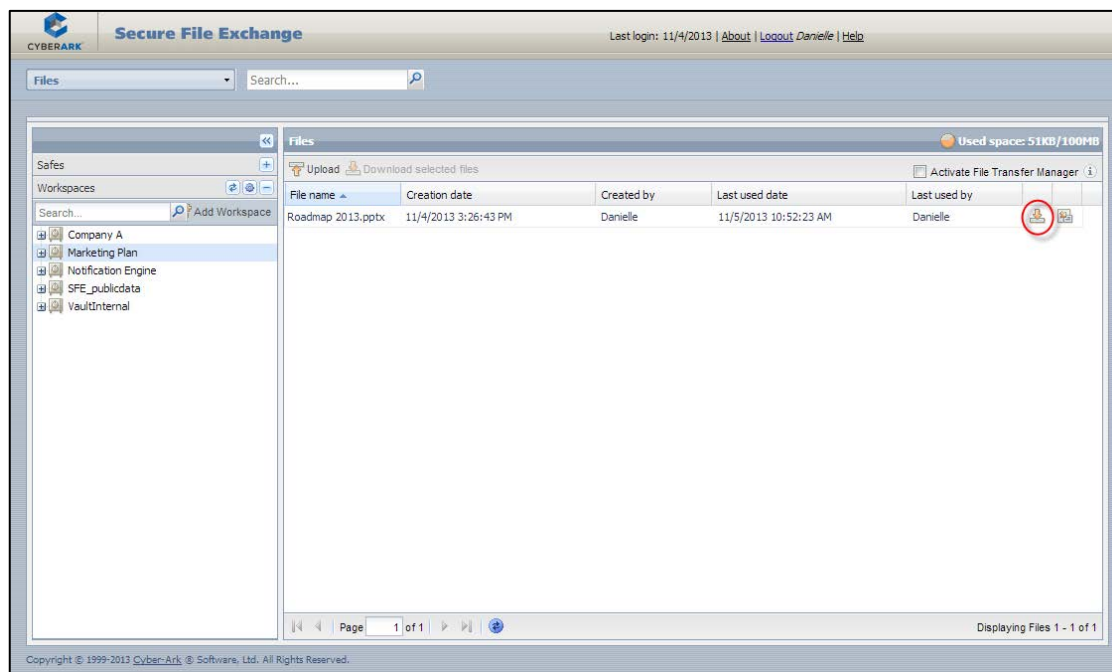
You can access a file that appears in the Files grid. While a file is being uploaded, it appears in gray and italics in the Files grid, but it cannot be downloaded. Once the file has been uploaded successfully, it is displayed in black in the Files grid and can be accessed. You can access files in the following ways, depending on your Workspace permissions:

- Download Files
- View Files Securely

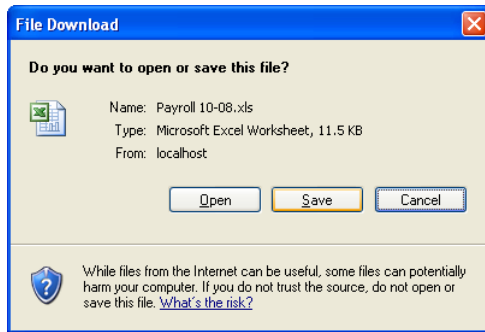
To Download Files

1. In the Safes/Workspaces panel, select the folder where the file is stored.
2. In the Files grid, select the file to access, then click **Download** as shown in the screen below.

You can sort the Files list according to any column. The Files List facilitates full sorting, meaning that when you sort the displayed files according to column, all the files are organized in the new order across all the pages in the list.



The File Download confirmation window appears, prompting you to confirm that you want to open the selected file.



3. Click **Open** to download and open the file. This is currently not supported on Firefox.

or,

Click **Save** to specify a download folder to which the file will be saved.

Note: To download files automatically to a predefined folder and track the download process, enable the My Transfer Manager (MTM). For more information, see the section Managing Single and Multiple Upload/Download Operations.

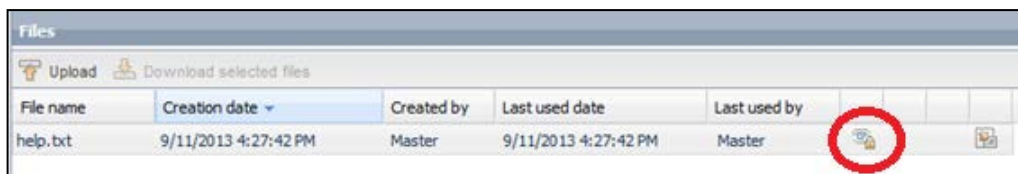
Viewing Files Securely

Users can view files securely without being able to download, copy or print them.

Note: This feature can only be used in browsers that fully support HTML5, such as IE10.

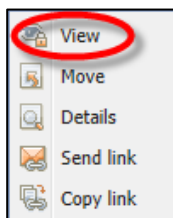
To View a File Securely

- In the Files page, select the relevant file and do one of the following:
 - Click the **View action** button for the file

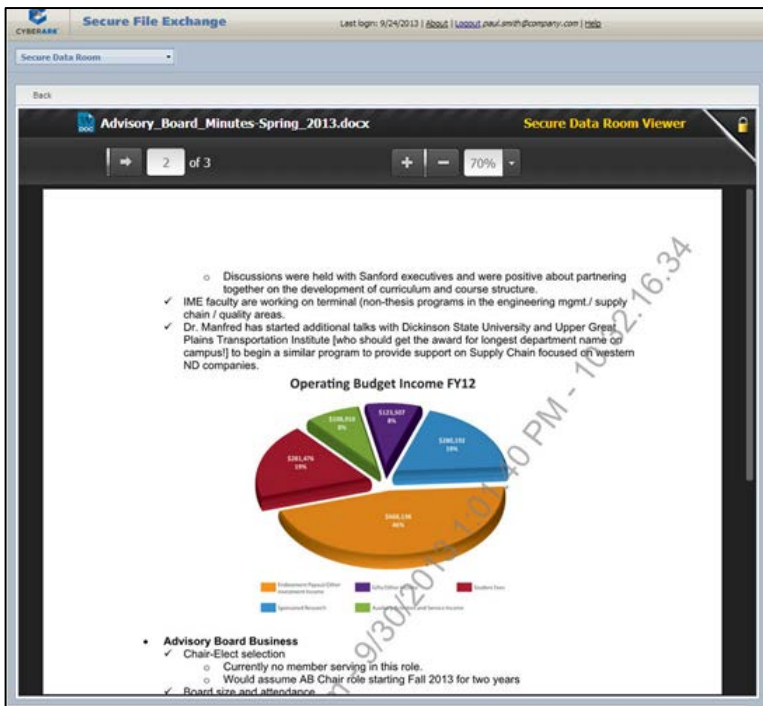


or,

- From the action menu, click **View**.



The file is displayed securely in the Secure Data Room Viewer, with a real-time watermark. Users can view the file without being able to download, copy or print it.



To View Previous Versions

1. Display the **File Details** page.
2. In the **Versions** tab, on the line of the file version, click **View**.

Managing Single and Multiple Upload/Download Operations

The My Transfer Manager (MTM) enables you to upload and download single or multiple files. In addition, it allows you to track the process and status of files that are being uploaded or downloaded. The MTM is installed as part of the SFE.

Enabling the MTM for Your User Account

- In the My profile page, select **My Transfer Manager**, then click **Save**

Or,

- In the Files page, select Activate File Transfer Manager

Defining the Download File Path

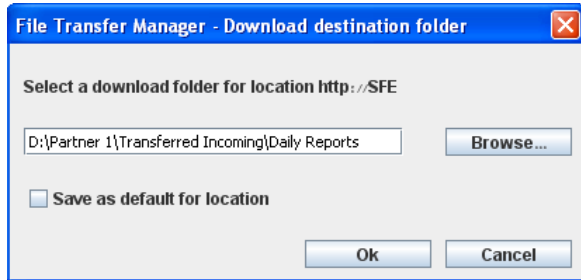
You can specify the folder where files are downloaded by the MTM. The default download folder is C:\Documents and settings\SFE.

1. In the My profile page, select **Prompt for download folder (takes effect after you restart/refresh the File Transfer Manager)**, then click **Save**.

The screenshot shows the 'My profile' page in the Secure File Exchange (SFE) interface. The page is titled 'My profile' and includes a 'Back' button. Under the 'My profile' section, there are 'User details' (User name: Danielle, Full name, Email) and 'Preferences' (Initial page: Services administration, Panels displayed: Safes and Workspaces, Default panel: Safes, Records per page: 25). The 'My Transfer Manager' section is checked and contains the following settings: Retries Interval (Sec): 30, Maximum Retries: 5, and a checked checkbox for 'Prompt for download folder (takes effect after you restart/refresh the File Transfer Manager)'. Below this is the 'Change Password' section with fields for Current Password, New Password, and Confirm Password. A 'Save' button is located at the bottom of the form. The footer of the page reads 'Copyright © 1999-2013 CyberArk © Software, Ltd. All Rights Reserved.'



When you begin to download files, the Download Destination Folder message box appears.

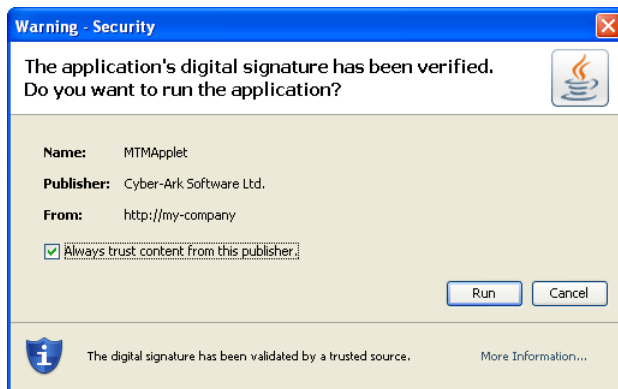


2. Specify the download folder,
or,
Click **Browse** to select the download folder.
3. If this folder will be used as the default download folder for every subsequent file download, select **Save as default for location**.
4. Click **OK** to set the specified folder as the MTM download folder.

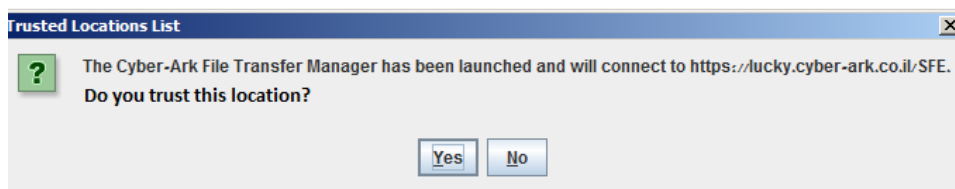
Using the MTM for the First Time

The first time files are transferred with the MTM, the MTM must authenticate to the web server so that it can work with the Vault. The MTM must be signed with a valid certificate so that it can perform operations, such as reading and creating files, on the local machine.

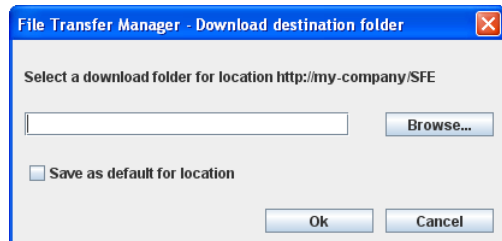
1. Start uploading or downloading files; the Security window appears.



2. Click **Run**; the MTM is authenticated to the web server, and the Trusted Locations List window appears.



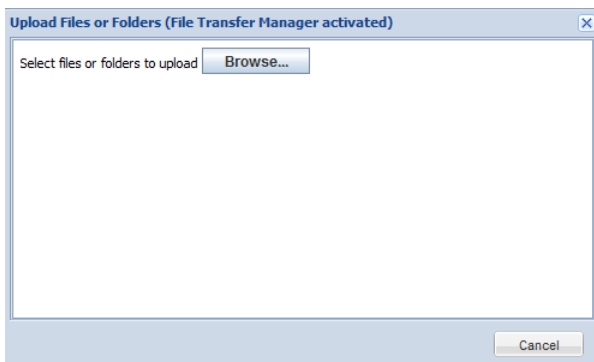
3. To add the MTM location to the Trusted Locations list, click **Yes**; the MTM location is added to the list and the upload or download procedure continues.
4. If the procedure is downloading files, the Download Destination Folder window appears.



5. Specify the folder to where the file(s) will be downloaded, or, Click **Browse** to select a download folder.
6. To use this folder as the default location for all downloads, select **Save as default for location**.
7. Click **OK**.

Uploading Files

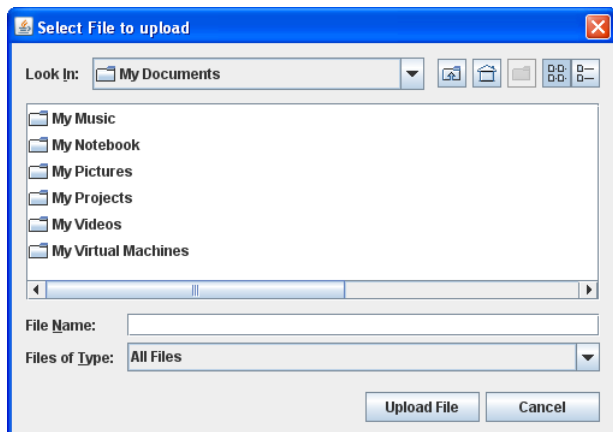
1. Display the folder to where the files will be uploaded, then click **Upload**; the Upload File window appears.



The title bar reflects the current status of the MTM: Activated, or not activated.

To transfer multiple files, the MTM must be 'activated'. For more information, see *Enabling the MTM for Your User Account*.

2. Click **Browse**; the Select File to Upload window appears.



3. Select one or more files to upload, then click **Upload File**; if the MTM is closed, an Upload confirmation message is displayed.
4. To view the My Transfer Manager window, click **Yes**.
You can view the file upload progress in the Progress bar.

Downloading Files

While a file is being uploaded, it appears in gray and italics in the Files grid, but it cannot be downloaded. Once the file has been uploaded successfully, it is displayed in black and can be accessed.

1. Display the folder that contains files to download.
2. In the Files list, click **Download** in the row of the file to download,
or,
Select multiple checkboxes to download more than one file, then click **Download selected files**.

Note: If this option is disabled, select **Activate File Transfer Manager** to enable it.



3. If you have specified a default download folder, the files will be downloaded to that folder.
If you have **not** specified a default download folder, the Download Destination Folder window appears.
4. Specify the folder to where the file(s) will be downloaded,
or,
Click **Browse** to select a download folder.

5. To use this folder as the default location for all downloads, select **Save as default for location**.
6. Click **OK**; if the MTM is closed, a message appears asking you whether or not you want to open the My Transfer Manager window.
7. To view the My Transfer Manager window, click **Yes**.

You can view the file download progress in the Progress bar.

The screenshot shows the My Transfer Manager interface within a Windows Internet Explorer browser window. The window title is "My Transfer Manager 5.50.73.0 - Windows Internet Explorer". Below the title bar is a "Clear history" button. The main area contains a table with the following columns: File, Site, Folder, Operation, Size, Transferred, Local path, Status, Progress, Rate, ETA, Added on, and Completed on. The table lists five file operations:

File	Site	Folder	Operation	Size	Transferred	Local path	Status	Progress	Rate	ETA	Added on	Completed on
March 2009.pdf		Custom:Root\Transactions	Download	10.51KB	3.03KB	C:\Documents and Settings\Liveauth...		29%	1952 KB/s	00:00:01	10/22/2009 1:55:0	
April 2009.xls		Custom:Root\Transactions	Upload	10KB	10KB	C:\Documents and Settings\Complete...		100%			10/22/2009 12:19:	10/22/2009 12:19:
January 2009.xls		Custom:Root\Transactions	Upload	10KB	10KB	C:\Documents and Settings\Complete...		100%			10/22/2009 12:15:	10/22/2009 12:15:
February 2009.xls		Custom:Root\Transactions	Upload	10KB	10KB	C:\Documents and Settings\Complete...		100%			10/22/2009 12:13:	10/22/2009 12:13:
August 2009.xls		Custom:Root\Transactions	Upload	10KB	10KB	C:\Documents and Settings\Complete...		100%			10/22/2009 12:12:	10/22/2009 12:12:

At the bottom of the window, there is a status bar showing "Page 1 of 1" and "Displaying file operations 1 - 9 of 9".

