FORTRA

Globalscape EFT v8.2.0 WTC & Workspaces User Guide

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WTC and Workspaces User Guide

The procedures for configuring and using the Web Transfer Client are described in the topics below.

How Do I Share Files?

Any user from anywhere in the world who has a computer with Internet browser or FTP client can access EFT and share files—provided the computer on which the user is attempting to connect to EFT is allowed access, and the user has an account defined on EFT. The user account itself or the group to which it belongs must have the appropriate permissions (upload, download, create folders, and so on) assigned on the VFS tab of the administration interface. When users log in to EFT, they connect only to their home folders and cannot browse above their home folders.

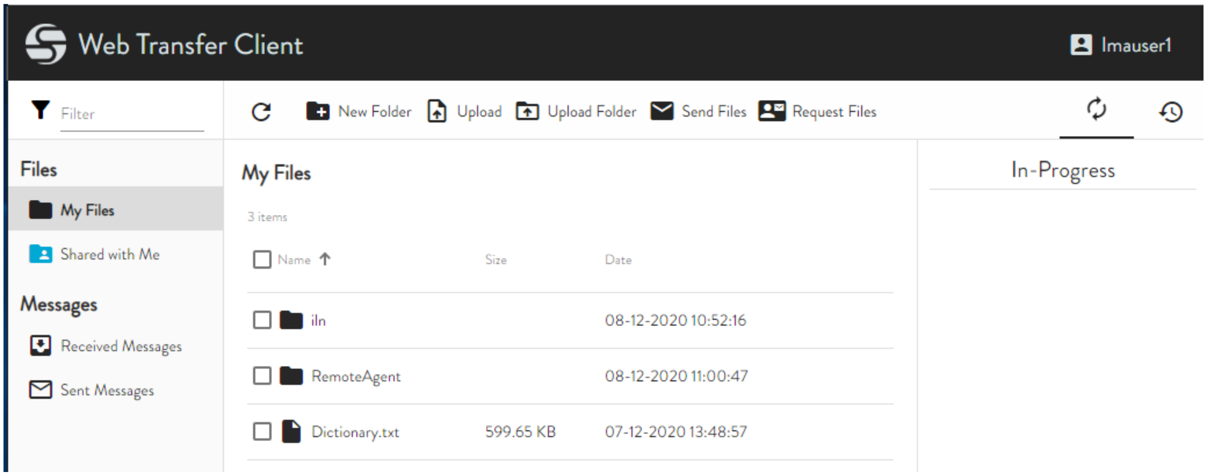
EFT allows the following methods through which you can share files using EFT:

- **Web Transfer Client (WTC)** - The WTC is EFT's browser-based file transfer client that allows users to transfer files over HTTP or HTTPS. The WTC can resume transfers and can send multiple files concurrently. It also has drag-and-drop support, integrity validation, a transfer queue, and no file-size limit. The number of files a directory listing can contain, the characters a file/folder name can contain, and the path length of directories is limited by Windows conventions. Refer to File-Naming Conventions for details. For regarding file-naming conventions, refer to the *Microsoft Windows Developer Network* article *Naming a File and the Microsoft TechNet* article How NTFS Works.
- **Workspaces** - Users can create shared folders in which to share files with other EFT users through the Web Transfer Client. Additionally, if the EFT administrator allows it, you can share files with external users and share your Workspaces folders.
- **EFT Outlook Add-In** - With the EFT Outlook Add-In, users can send files via email and the recipient can pick them up in their web browser through Workspaces.

- **Mobile Transfer Client** (MTC) - The MTC is a mobile app that provides a way for iOS and Android phone and tablet users to securely connect to EFT and upload and download files while providing a number of centrally managed security controls for safeguarding your corporate data.
- **Globalscape's CuteFTP®** or a similar "FTP client" - Any FTP client can be used to connect to EFT and transfer files. For more information about CuteFTP, refer to https://www.globalscape.com/cuteftp or online help.
- **Windows File Explorer** - (Not available in EFT Arcus) When logged in to the EFT computer, administrators can manage files on EFT using Windows File Explorer. By default, user files are stored in the **C:\Inetpub\EFTRoot** folder in the **Usr** folder under the Site on which their account is defined (or, on HA implementations, in the shared configuration path, e.g., **\\x.x.x.x\inetpub\EFTRoot\mySite\Usr\username**). In the illustration below, user **imauser**, defined on **GSSite**, stores files in the **imauser** folder. Anyone with the proper permissions on the EFT computer can drag and drop, copy and paste, and create and delete files and folders, just like in Windows File Explorer.
- **Command Prompt** - At a command prompt, you can enable an FTP session and transfer files, if you are familiar with basic DOS commands. Refer to the KB article "Can I use a Windows Command Prompt to send FTP commands to a server?" for list of common commands.

Overview of the Web Transfer Client

The *Web Transfer Client* (WTC) is a browser-based file transfer client that allows you to transfer files over HTTPS to and from the EFT server. Using the WTC, you can upload and download files, pause and resume a transfer, cancel a transfer, move files between folders, create, rename, and delete folders and files, and share folders with other users. The WTC is also used as the interface for Workspaces.



Under **My Files**, you will see a count of the number of files and folders displayed. If you select one or more files and/or folders, it will display the number of items selected.

Toolbar

The toolbar icons that appear depend on what you have selected:

- New Folder, Upload, Upload Folder, Send Files, and Request Files appear when no files are selected.
- Share, Download, Rename, Move, and Delete appear when a file or folder is selected.

In-Progress and History Panel

Click the **In-Progress** icon to see files that are uploading or the **History** icon to view activities that occurred in the current session.

Some of the pop-up dialog boxes or messages in the WTC do not have a **Cancel** button or an **X** in the corner. To close those dialog boxes, click anywhere outside of that window and it will close.

For information about the Terms of Service and Privacy Policy, refer to Logging In.

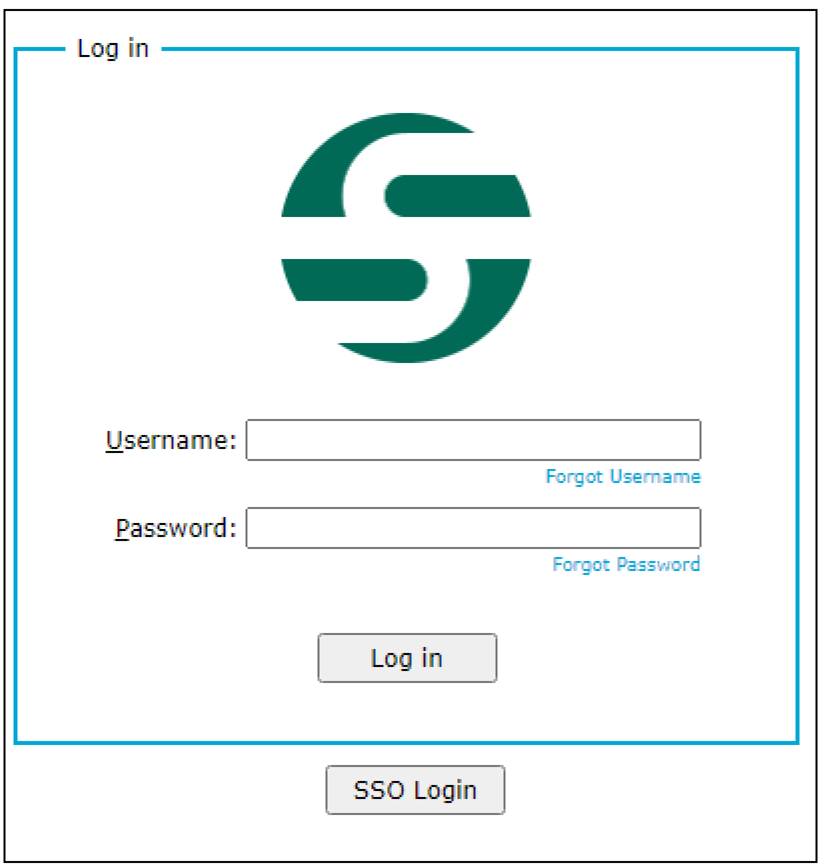
Logging In

You can log in to the WTC and Workspaces in any supported browser. The system administrator will provide you with the URL (web address) and your login information.

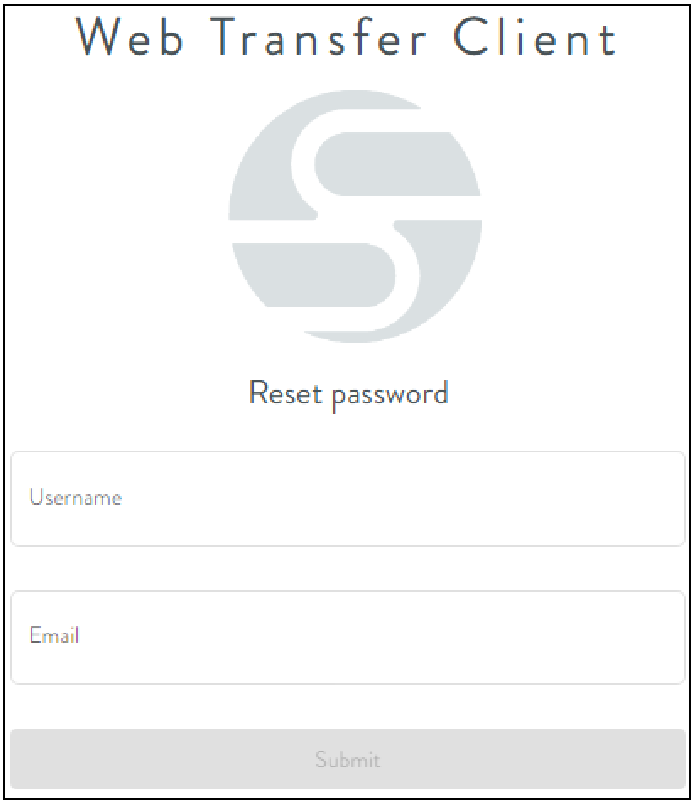
The EFT administrator should inform end users which IP address, port, username, and password should be used to log in to a Site. Because many users are unfamiliar with <IP address:Port> formatting, be sure to provide users with the exact URL that they should access to log in, whether they are accessing a Site from the Web Transfer Client, "plain-text" client, a command line, CuteFTP, or any other FTP client. For example, you could provide the link in an email.

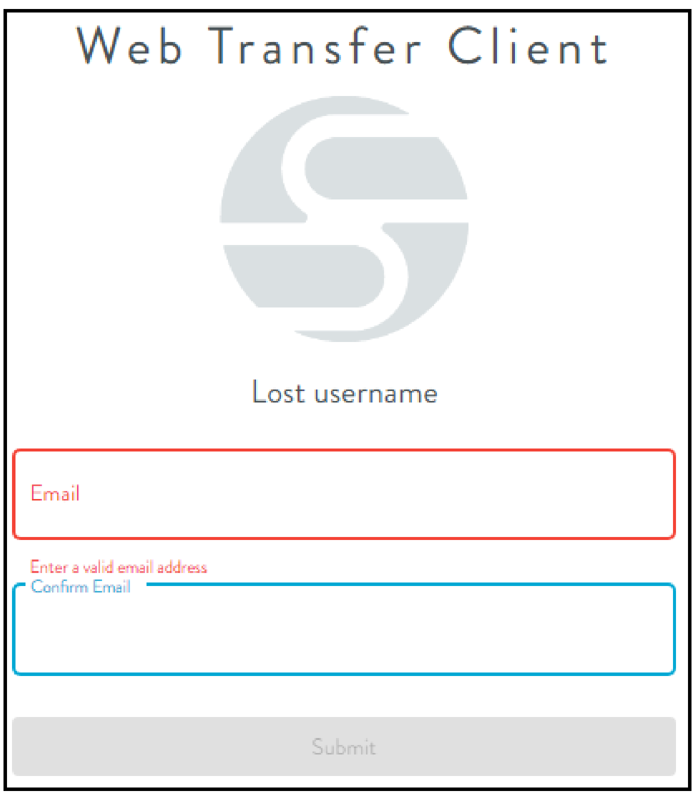
To log in

1. Open the web browser.
2. Type or click the web address provided to you by your system administrator. For example, type `https://www.ourfileserver.com`. The login page appears. (The **SSO Login** option appears if so configured.)

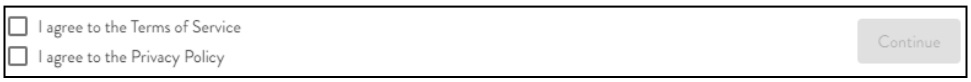


3. Provide your **Username** and **Password**, then click **Log In**. If you have been instructed to use secure sign-on, click **SSO Login**.
4. If you have been instructed to use two-factor authentication, you will be asked to provide a second response, such as a passcode. The EFT administrator can change the text that appears for the challenge. Refer to the article at https://kb.globalscape.com/KnowledgebaseArticle11267.aspx for details.
5. If you don't know your username, click **Forgot Username** (if available). If you don't know your password, click **Forgot password**. In the dialog box that appears, provide your information and then click **Submit.**
    - If it is so configured in the EFT administration interface, users are prompted to change their password the first time they log in.
    - If a security prompt appears asking you to accept the website's certificate, select the **Always trust** check box, and then click **Yes**.
    - If a prompt appears to provide a passcode, use the method asked for in the prompt to retrieve your passcode (Email or SMS). In the dialog box that appears, provide your information and then click **Submit**. You will be asked for your email address to which the reset information will be sent. Your request is sent to the server and an automated response will email you your username.


Web Transfer Client
Reset password
Username
Email
Submit


Web Transfer Client
Lost username
Email
Enter a valid email address
Confirm Email
Submit

- If you don't know your username, click **Forgot Username** (if available). Your request is sent to the server and an automated response will email you your username.
- If you don't know your password, click **Forgot password**.
- When the credentials are accepted by the server, the Web Transfer Client (WTC) appears.
- Depending on how the EFT administrator configured the WTC, you might see a box in which you can read and agree to the organization's Privacy Policy and Terms of Service.



- The administrator can configure EFT to require implicit or explicit agreement.
    - **Implicit** - Accept the agreement by using the WTC:
        - Click **Terms of Service** to read the agreement. Click anywhere outside of the agreement to close it.
        - Click **Privacy Policy** to read the policy. Click anywhere outside of the policy to close it.
        - Click the **X** to close the Terms of Service/ Privacy Policy box.
    - **Explicit** - Select the **Agree** check boxes, and then click **Continue**.

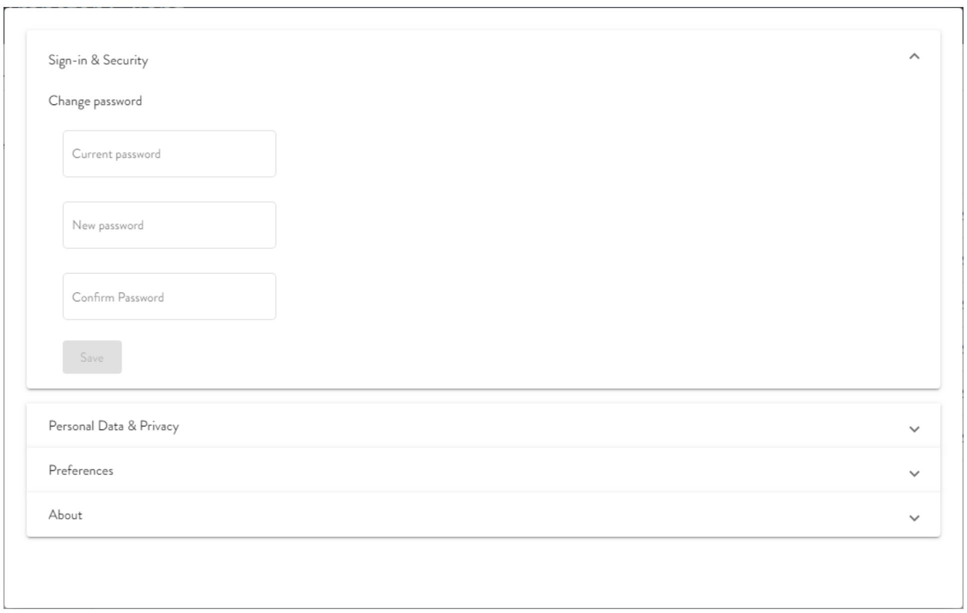
Once you have accepted the agreement/ policy, your account information in EFT is updated to reflect your acceptance so that you don't have to accept the agreement/ policy every time you log in.

Changing Your Password

The administrator may have set your password to expire periodically. You can change your password within the Web Transfer Client. (The administrator must have enabled users to reset their passwords on the **Security** tab in the EFT administration interface.)

To change your password

1. In the upper-right corner, click your login name, then click **Profile**.
2. Click **Sign-in & Security**.



3. Provide your **Current password** and a **New Password**, and then **Confirm Password**. If the administrator requires complex passwords, a message will appear if your password does not meet the complex password or reuse password requirements.
4. Click **Save**. Click anywhere outside of the dialog box to close it.

Sharing Folders (Creating a Workspace)

You can invite internal and external users to share your folders, if the EFT administrator enables and configures Workspaces to do so. To share folders, the administrator has to have enabled Workspaces in the EFT administration interface on the **Web** tab of the Site. Workspace participants who were invited to share a Workspace cannot add participants to that folder, however, they can create new folders.

When the Workspace owner invites someone to join the workspace, EFT sends them the invitation via email. The invitation recipient clicks the link embedded in the email and then signs in to EFT (if an account has previously been created), or creates an account on EFT.

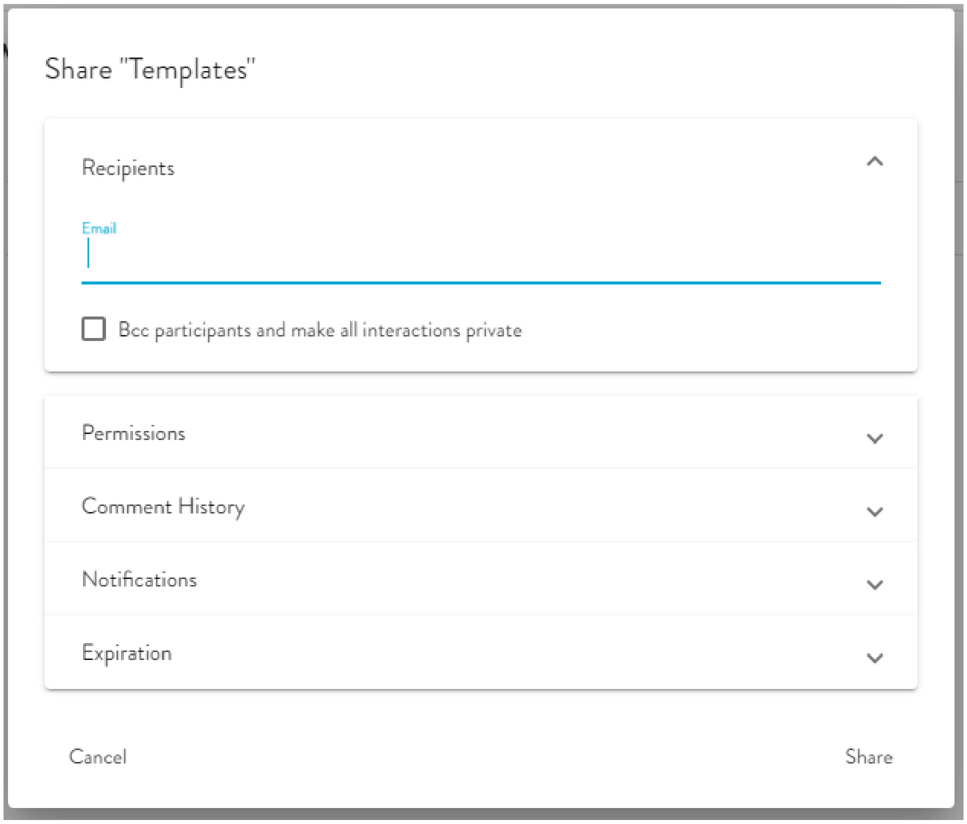
- Workspaces invitations expire after 5 days.

  If the Workspace invitation has expired before the invitee attempts to register, a prompt appears that says the invitation cannot be found.

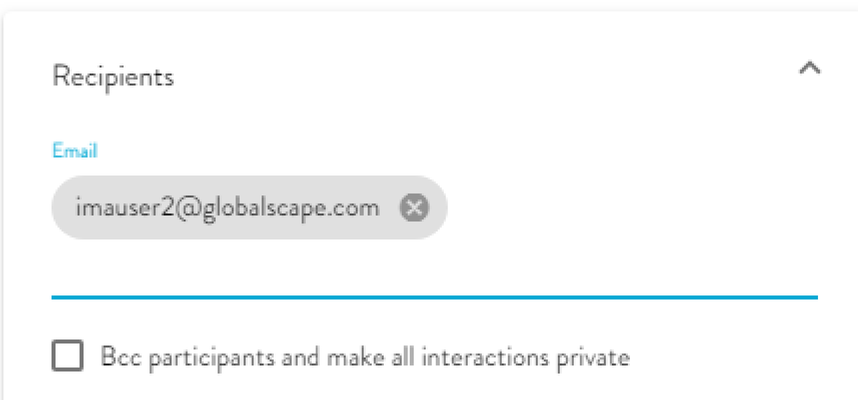
- Administrators can see and manage invited (guest) accounts in the administration interface on the VFS tab.

To share a folder

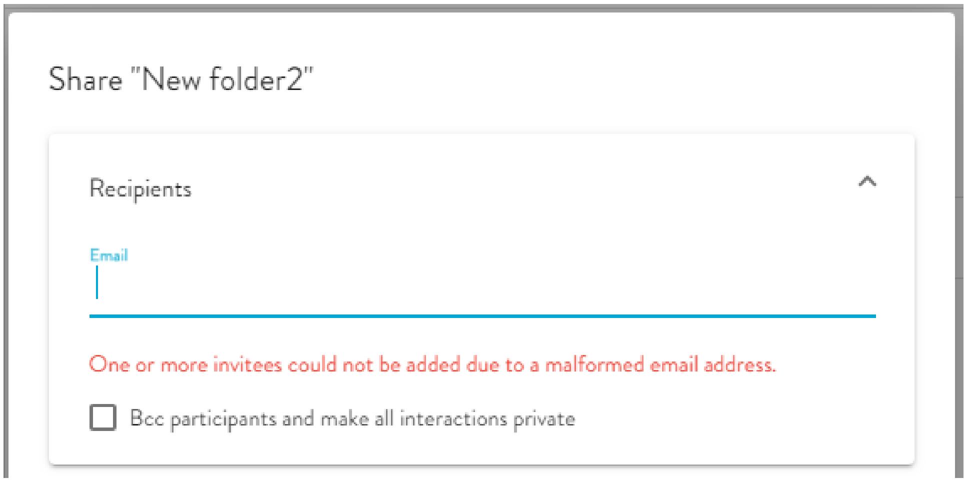
1. Log in to the Web Transfer Client.
2. Select the check box of the folder that you want to share, then click the **Share** icon. The **Share** dialog box appears.



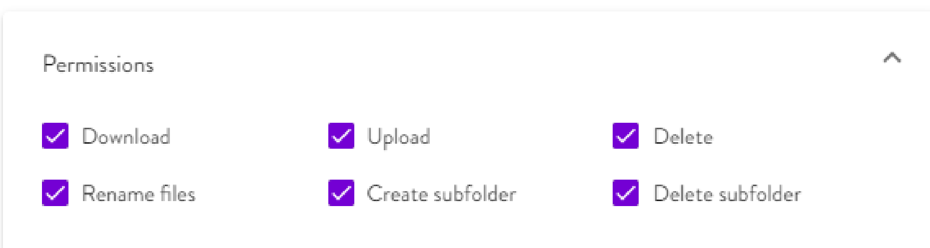
3. Provide email addresses of users with whom you want to share the folder. (You can later add or remove participants.) The email address appears in a gray box. (If it doesn't, press ENTER at the end of the email.)



- If the email is not properly formed (username@domain.com) an error message appears.



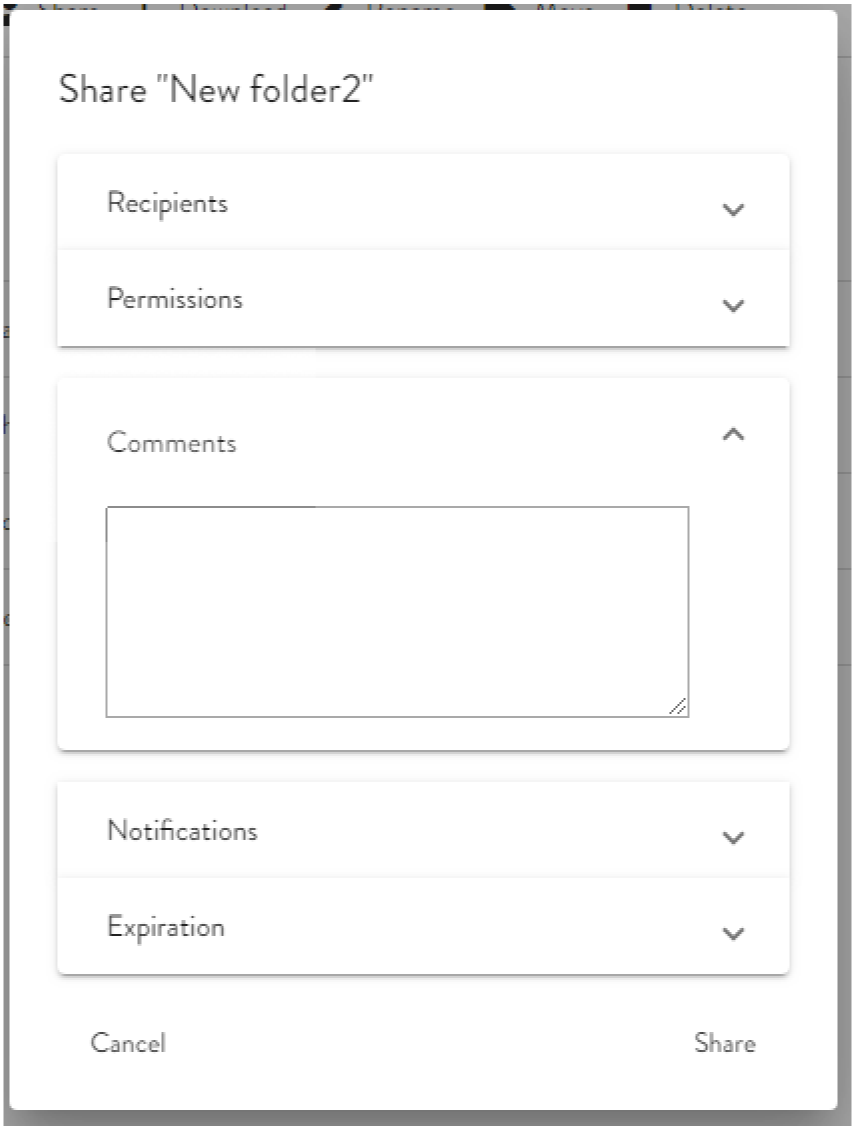
4. To create a private workspace, select the **BCC** check box. When a Workspace is private, the Alerts/Notification icon, the Workspace participants icon, and the comments icon are hidden from the recipient.
5. Assign permissions by clearing or selecting the check box next to that permission. By default, all permissions are selected (enabled). Clear the check boxes of the permissions that you do not want to assign to the users.



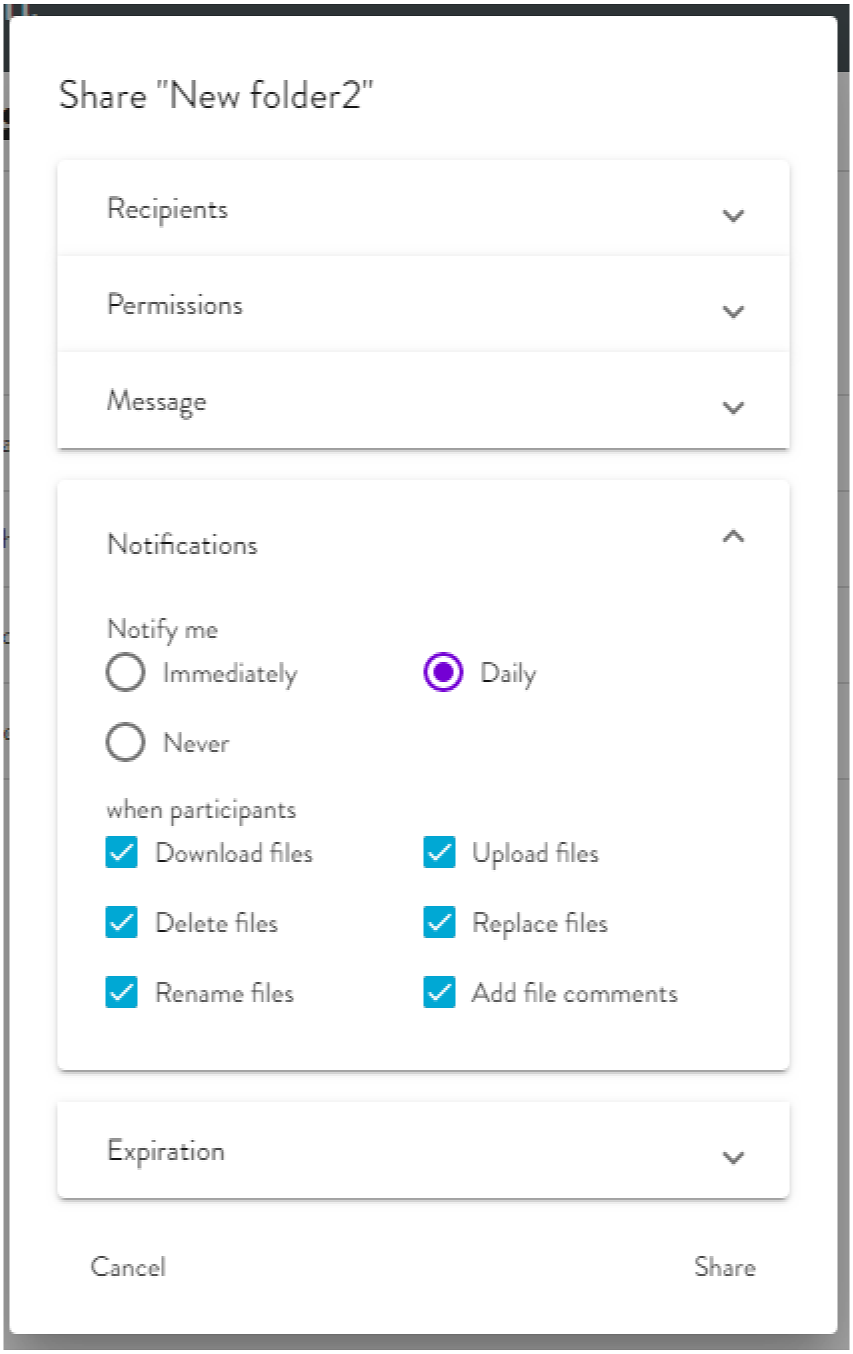
The administrator can specify which permissions check boxes are selected by default, if any. The sharing user can still select the check box to enable the permission. Refer to Edit-Remove Workspace Permission for details. Permissions that the administrator assigns to folders override any permissions that you assign. That is, if the folder that you are sharing does not have rename permission, you cannot assign that permission to the folder.

6. (Optional) In the **Comments** box, you can type comments. When you create a Workspace, the comment that you type in the **Comments** box appears in the invitation email.

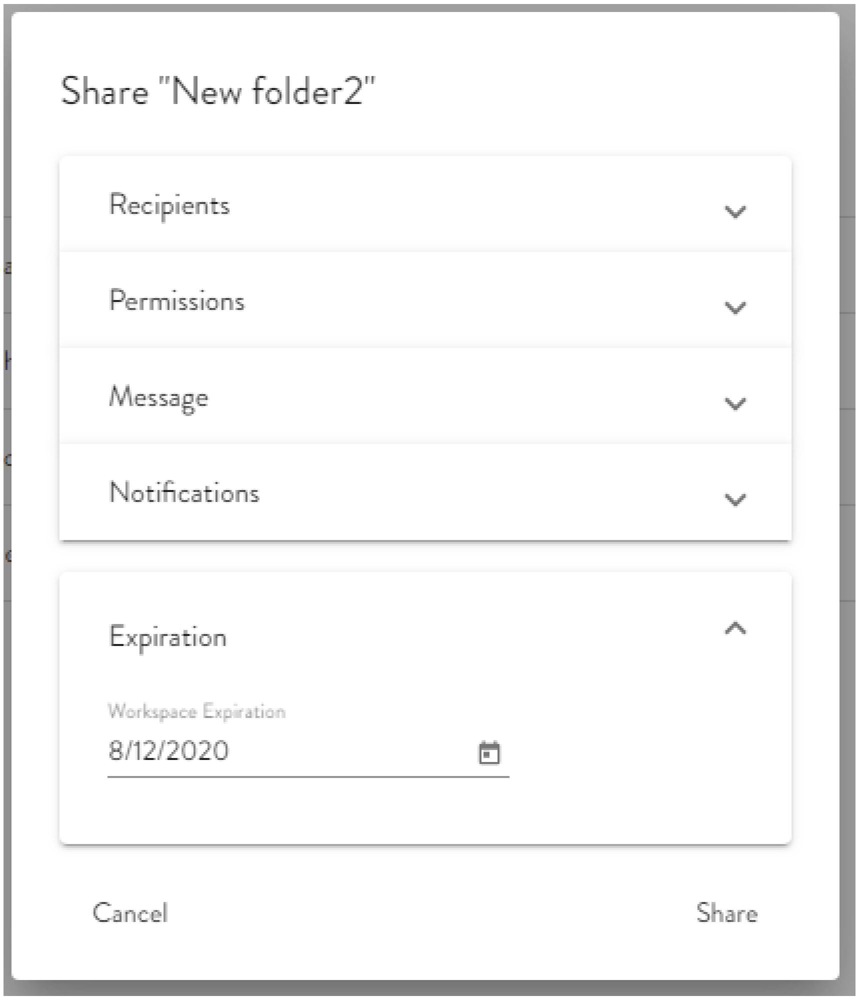
- View a history of comments added by clicking the shared folder and then clicking the comment icon.



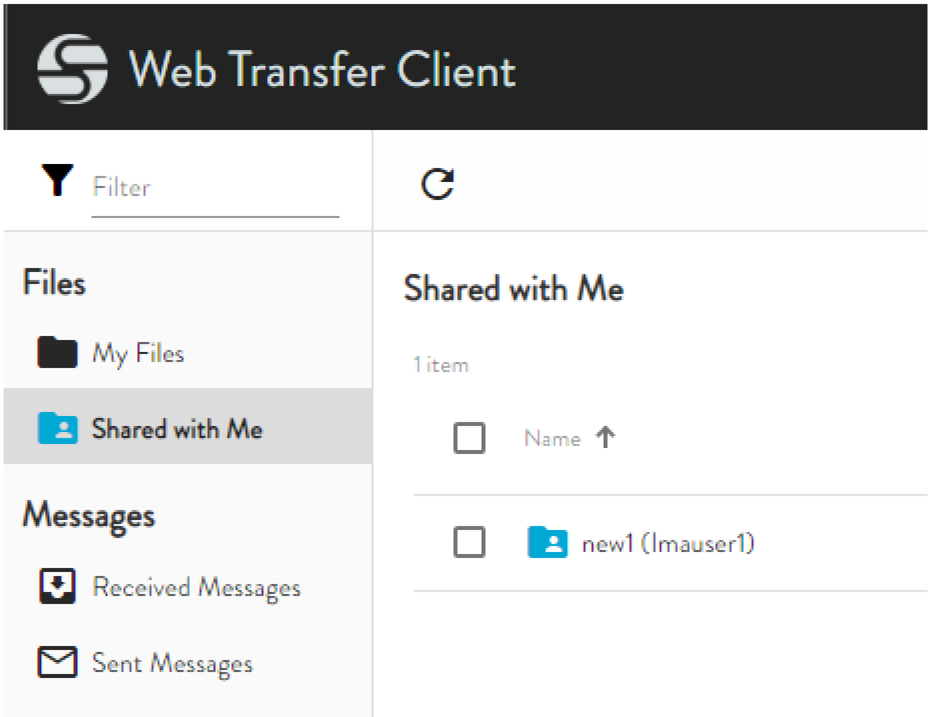
7. In the **Notifications** box, you can specify the type and frequency of email notifications about this Workspace.



8. (Optional) To expire the Workspace, click **Expiration**, and then specify the expiration date. The limit is specified in the administration interface in the **Workspaces - Share** dialog box on the **Site > Web** tab. (Alternatively, there is a Stop Sharing icon in the WTC toolbar.) The default expiration date appears, when defined in the administration interface.



9. Click **Share**. The Activity pane updates to indicate you've shared a folder. The users with whom you have shared the folder will see the shared folder in their **Shared with Me** tree. The username of the account that is sharing the Workspace appears in parentheses after the name of the folder (for example, *New Folder 2 (Imauser1)*).

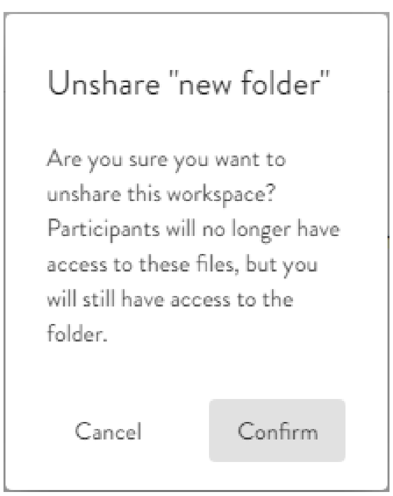


Stop Sharing a Workspace

When you no longer need to share a Workspace, you can "unshare" the folder.

To stop sharing the folder

1. Click the shared folder.
2. Click the **Unshare** icon. The **Unshare <folder_name>** message appears.



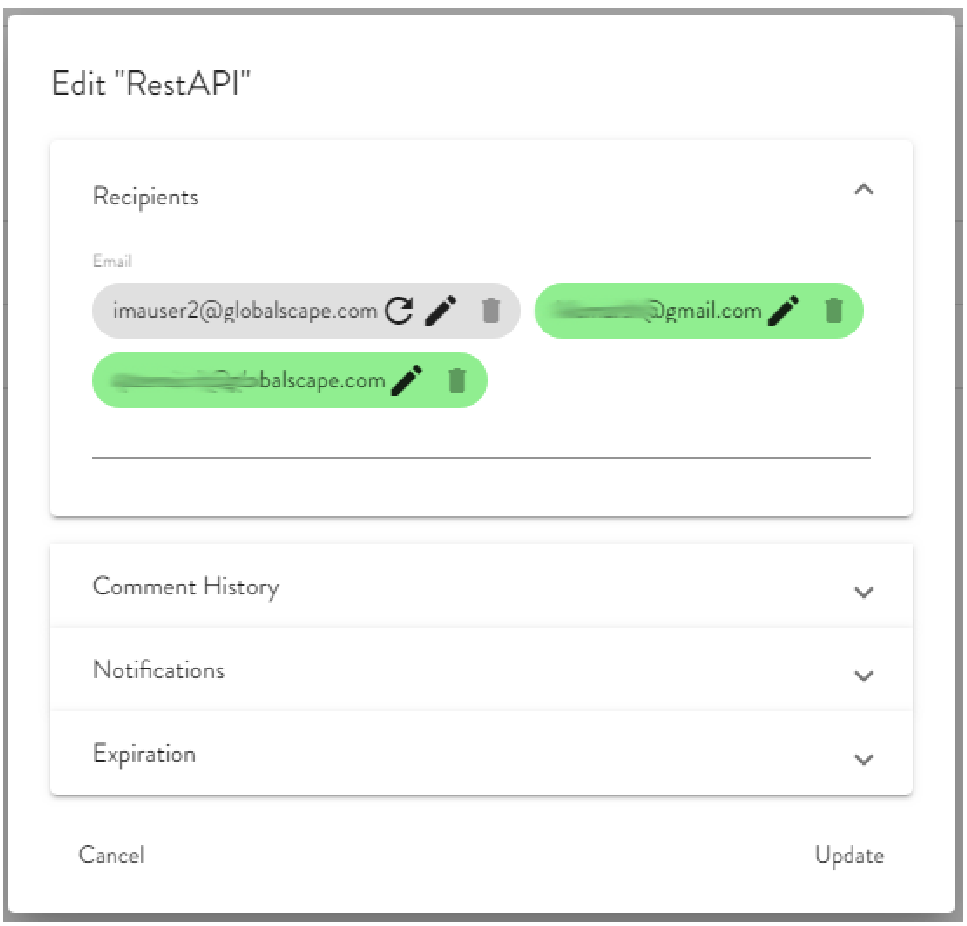
3. Click **Confirm**. Any user with whom you've shared the folder can no longer access the folder.

Add Workspace Participants

After you have created a Workspace and invited participants to join the Workspace, you might later want to add participants.

To add participants

1. Click the check box next to the shared folder, then click the **Edit Workspace**.
2. Provide one or more additional email addresses, press ENTER. The box around the email address will turn green to indicate the user has been added to the Workspace.



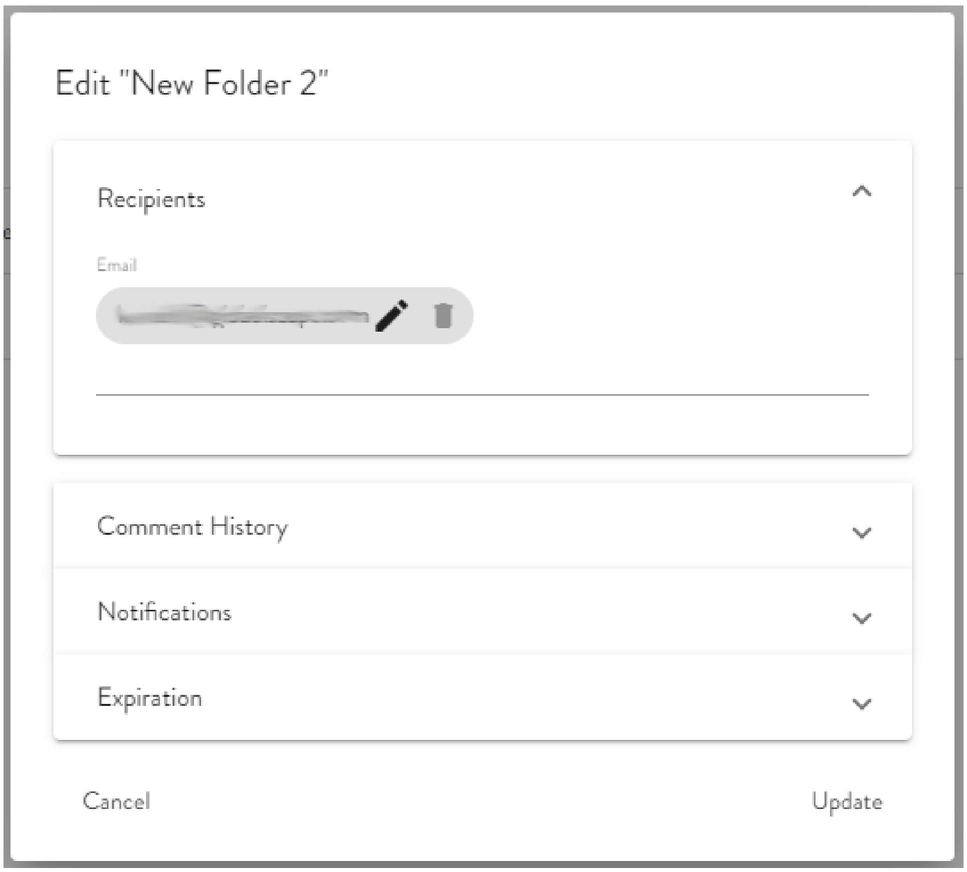
3. Click the pencil icon to assign permissions, if different, then click **Update**.

Edit-Remove Workspace Permission

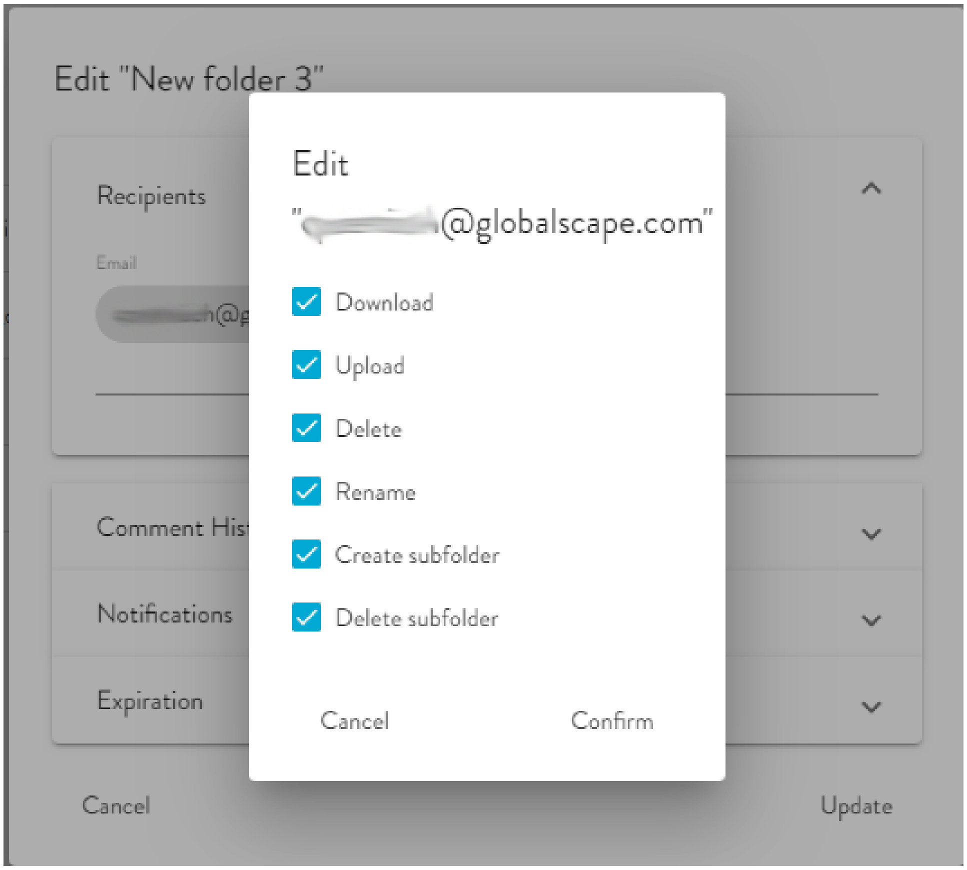
The default settings for Guest Users include **Download**, **Show this folder in parent list**, **Show files and folders in list**. Users with whom a Workspace is shared do NOT have permission to move files and folders out of the Workspace.

To edit a Workspace participant's permission or remove the user from the Workspace

1. On the tool bar, click the **Edit Workspace** icon.



- To delete the user, click the trash can icon.
- To edit the user's permissions, click the pencil icon for the user that you want to edit, then make the changes to the user's permissions, as needed.



2. Click **Update**.

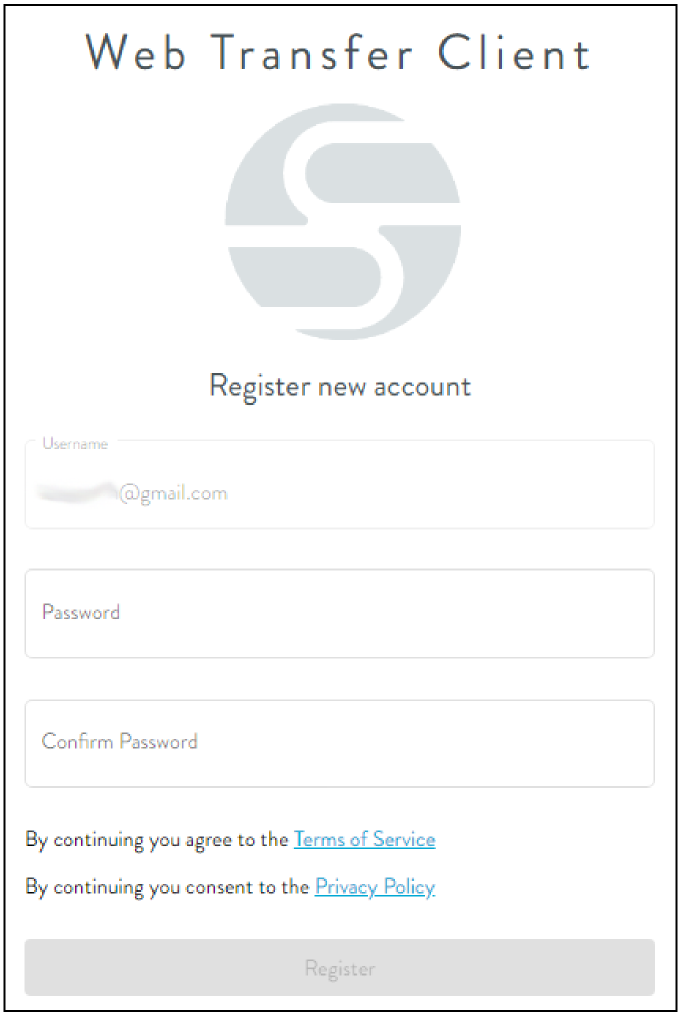
Register a New Account

When a Workspace creator invites others to a shared folder, an email is sent to each invitee.

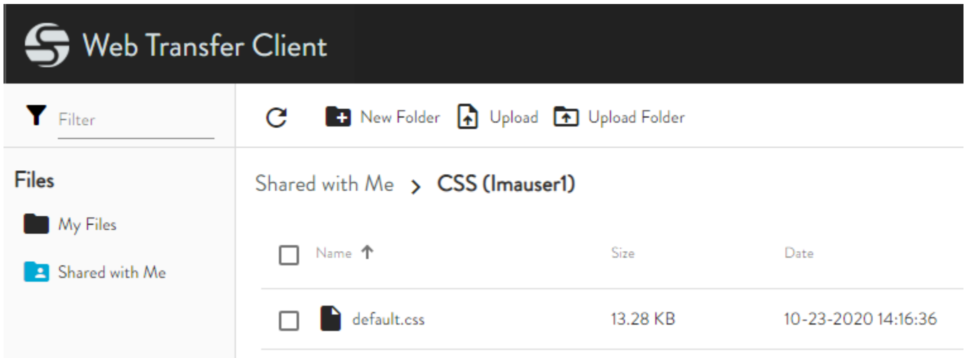
If the Workspace invitation has expired before the invitee attempts to register, a prompt appears that says the invitation cannot be found.

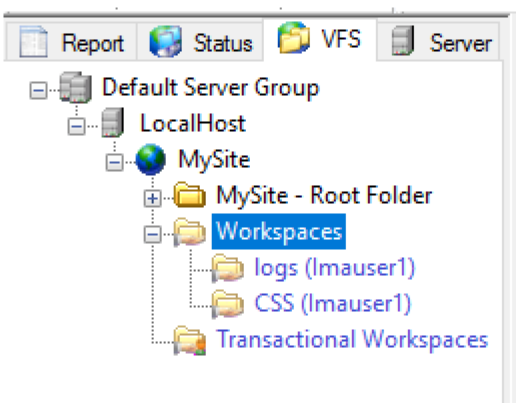
To join a Workspace

1. In the email invitation to join a Workspace (a shared folder), click **View Folder** (or right-click and then click **Copy link address**). The default browser opens with the WTC Registration page displayed.



2. The username for the account is the email address that the invitation is sent to. Create and confirm a password to register this username.
3. A one-time passcode is sent your email or or phone. Enter the passcode, then click **Submit**. The account verification process occurs, and then you can log in.
4. The Web Transfer Client appears and displays the folder that was shared with you. The username of the Workspace creator appears next to the shared folder and in the VFS in the EFT administration interface.





Downloading Files

You can download files from the server to your local computer on which you have download permission. The mechanism for downloading files is browser dependent. That is, Microsoft Edge/ Internet Explorer, Google Chrome, and Mozilla Firefox each has its own mechanism for downloading files.

- The Web Transfer Client does not support a CRC-check for downloaded files because of the limited access of the client file system. The process of initiating a download is human driven and is wholly managed by the browser itself, for security reasons. Further, the browser cannot arbitrarily read files on the local file system (for obvious security reasons), so EFT cannot read contents of downloaded files to do CRC32, and thus cannot issue a follow-up HEAD request to verify the integrity of the download.
- In certain browsers, if you are using a self-signed certificate you will receive a "network issue" warning when downloading files. Workarounds are to have a valid certificate, use special flags to ignore improper certificates, or not use HTTPS.

- The number of files per ZIP file download is specified in the WTC administrator JSON file (\EFT Server\Web\Shadowfax\wtc\assets\admin-configuration.json).

  ```
  "batchDownloadAsZipThreshold": 5
  ```

To download files

- Do one of the following:
  - **In the WTC**, click the file(s) you want to download, then click the **Download** icon. The file downloads to the folder defined in your browser's configuration. (To open your browser's **Downloads** folder, see below.) When you select multiple files or folders before clicking **Download**, they are downloaded as a ZIP file.
  - **In the Pickup Portal,** click one or more files that you want to download, then click the **Download** icon. The file downloads to the folder defined in your browser's configuration. (To open your browser's **Downloads** folder, see below.) When you select multiple files before clicking **Download**, they are downloaded as a ZIP file.
  - **For direct download In your browser**, copy and paste the URL provided by your administrator or in your company portal (for example, https://workspace.mycompany.com/directdownload/foo/MetaData2.db), then press ENTER. (This option is often referred to as "direct download" or "anonymous download.")
    a. Login. The **Save As** dialog box appears and the file downloads.
    b. Specify a location, if different, then click **Save**.

To open your browser's Downloads folder:

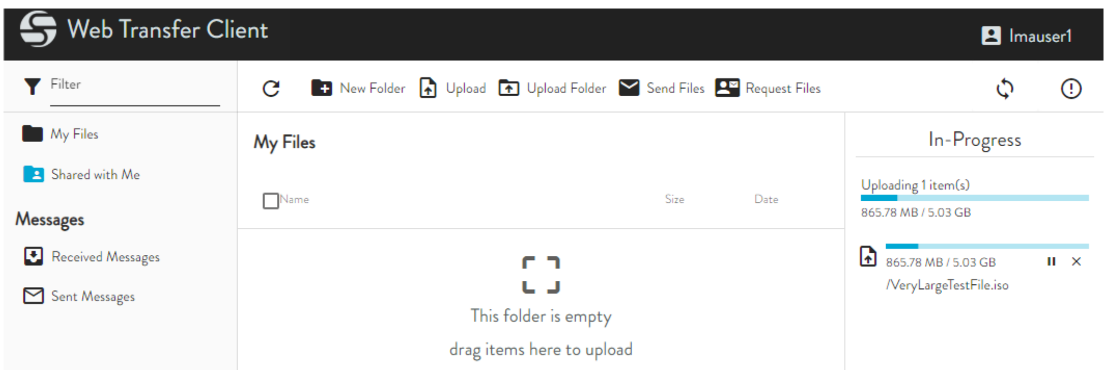
- In Chrome and Edge, click the **Settings** icon, then click **Downloads** (or press CTRL+J).
- In Firefox, click the green down-facing arrow to view most recent downloads, or type `about:downloads` in the address bar to view all downloads.
- In Safair, click the **Downloads** icon.

Uploading Files and Folders

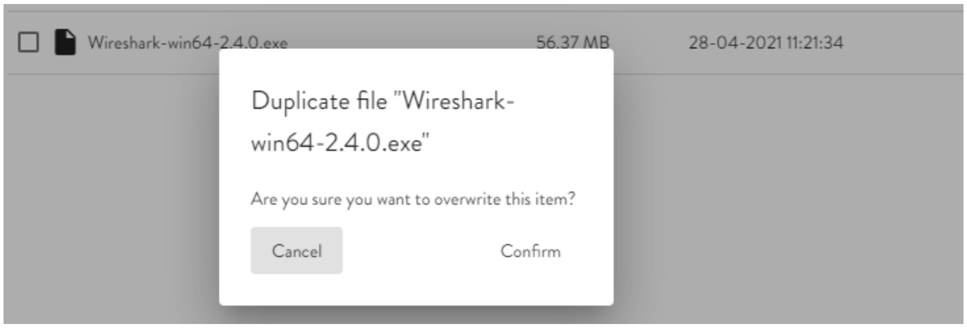
In the Web Transfer Client, you can upload files and folders from your local computer to a remote server on which you have upload permission. Folder uploads and large file uploads are available in Chrome, Firefox, or Opera browsers only. If you want to upload folders in other browsers, you must compress them (make a ZIP file) and upload the ZIP file. Internet Explorer cannot upload files larger than 4GB.

To upload files between your local system and the server

- Do one of the following:
  - To transfer files and folders to the server, click **Upload**.
  - Click and drag one or more files or folders from your local file system to the file list. (Empty folders will be ignored and not transferred.)



- The PAUSE icon allows you to pause an in-progress transfer. If you want to clear the pane, you can click the CANCEL icon for each transfer
- When the file is transferred, if there is a file with a duplicate name already in your folder on the server, you are presented with a prompt asking if you want to overwrite the existing.



- You can upload multiple selected files at once by dragging and dropping from your local system to the WTC, or by clicking **Upload** and then selecting multiple files. The **In-Progress** pane displays the number of files selected to be uploaded until they are all uploaded. That is, if you are uploading 5 files and 3 of them have completed uploading, the display still says "Uploading 5 item(s)."
- If you have exceeded your allowed disk quota on the server, a message appears when you attempt to upload more files. To continue to upload files, you must delete some of your old files from the server or ask your administrator to increase your allowed disk quota.
- Before you can access the server using the WTC, the administrator must configure the server to allow WTC connections with your account.
- If network connectivity is lost while the WTC is transferring files, you can retry transfers that previously failed or were incomplete. If a file partially transferred before the connection went down, the transfer will be resumed from the point that it left off.

Resuming Transfers

A file transfer can be interrupted for various reasons, such as a network glitch, or you might pause the transfer yourself. When a transfer is interrupted because of errors, it will resume automatically after network connection is reestablished (up to 10 retry attempts over a 5-minute period).

To resume a paused transfer

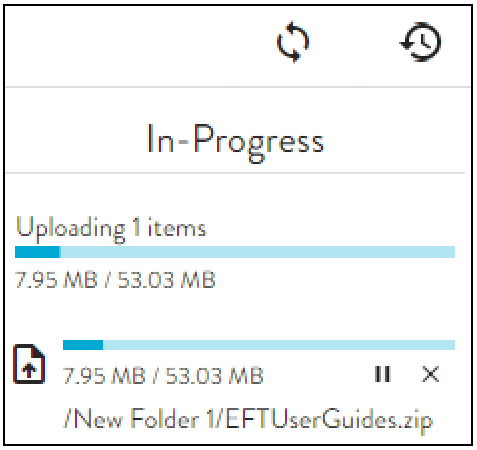
1. Transfers that have been interrupted appear in the **In-Progress** queue.
2. Next to the paused file, click the **Play** icon. The transfer will resume where it left off.

Canceling a Transfer

Most files that you transfer will transfer so quickly, you won't even notice. Larger files, however, will show progress in the **In-Progress** pane You can cancel an in-progress transfer.

To cancel a transfer

1. In the **In-Process** pane, while the transfer is in progress, click the PAUSE icon.



2. Click the PLAY icon to continue the transfer.
3. Click the **X** to cancel the transfer.
4. The pane is cleared after the transfer is complete.
5. You can show or hide the **In-Progress** pane using the circular arrows icon at the top of the pane.

Workspace and File Expiration

If you want to expire your Workspace earlier than the limit set by the administrator, you can do so in the Web Transfer Client.

- If the EFT administrator has enabled link expiration, the ability to download the attachments will expire within the time specified.
- If the administrator has selected the Retain files after link expiration check box, the temporary Workspace is removed from the virtual file system in EFT, but the files are still available on disk until the "retain files" expiration date. This setting applies to file expiration (separate from link expiration) and affects Drop-Off portal, Send portal, Reply portal, and request-file methods of file delivery.

To expire the Workspace

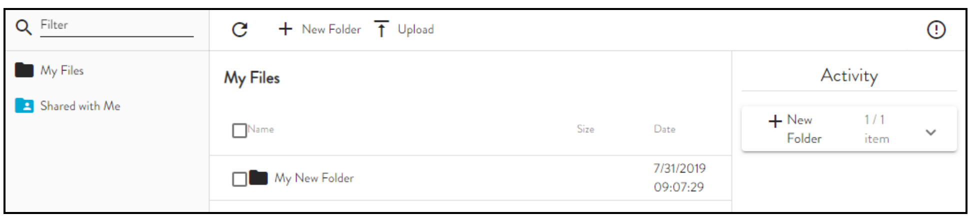
1. Select the Workspace (folder) that you want to expire.
2. On the tool bar, click **Edit Workspace**.
3. Specify the date that you want to expire the Workspace.
4. Click **OK**.

Creating Folders

When you first log in to the Web Transfer Client (WTC), you are in the top folder that you are allowed to view. You can create sub folders within this folder, and those folders can have subfolders.

To create sub folders

1. In the folders pane, click to select the folder (for example, **My Files**) under which you want to create a subfolder.
2. On the toolbar, click **New Folder**.
3. Provide a name for the folder, then click **Create**. (Folder names follow standard Windows file naming conventions.)
4. The new folder appears in the right pane, and the Activity pane indicates that you created a new folder. (Click the information icon to open the Activity pane.) You can now move files between folders and upload files to the new folder.



Deleting a Folder or File

You can delete folders and files in your home folder and in subfolders.

To delete a file or folder

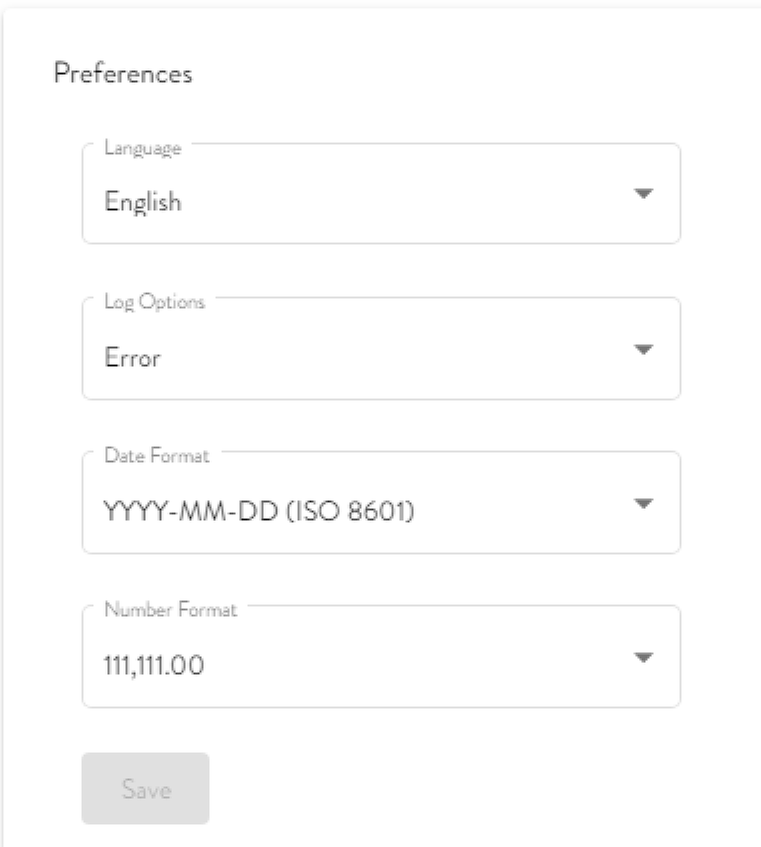
1. Select the check box for the file or folder that you want to delete.
2. On the toolbar, click the **Delete** icon.
3. The **Delete confirmation message** appears. Click **Confirm**. The file is deleted. There is no restore or undo option.

Change Your Profile

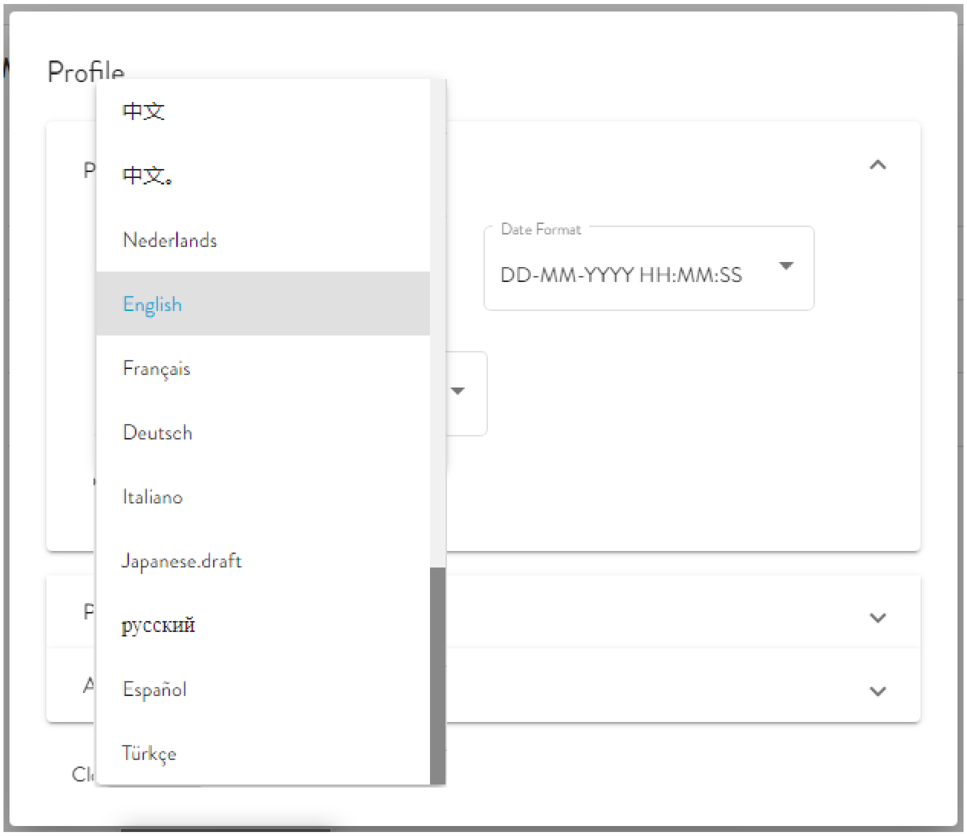
You can specify options for language, logs, data format, and number format in the **Profile** dialog box.

To change your preferences

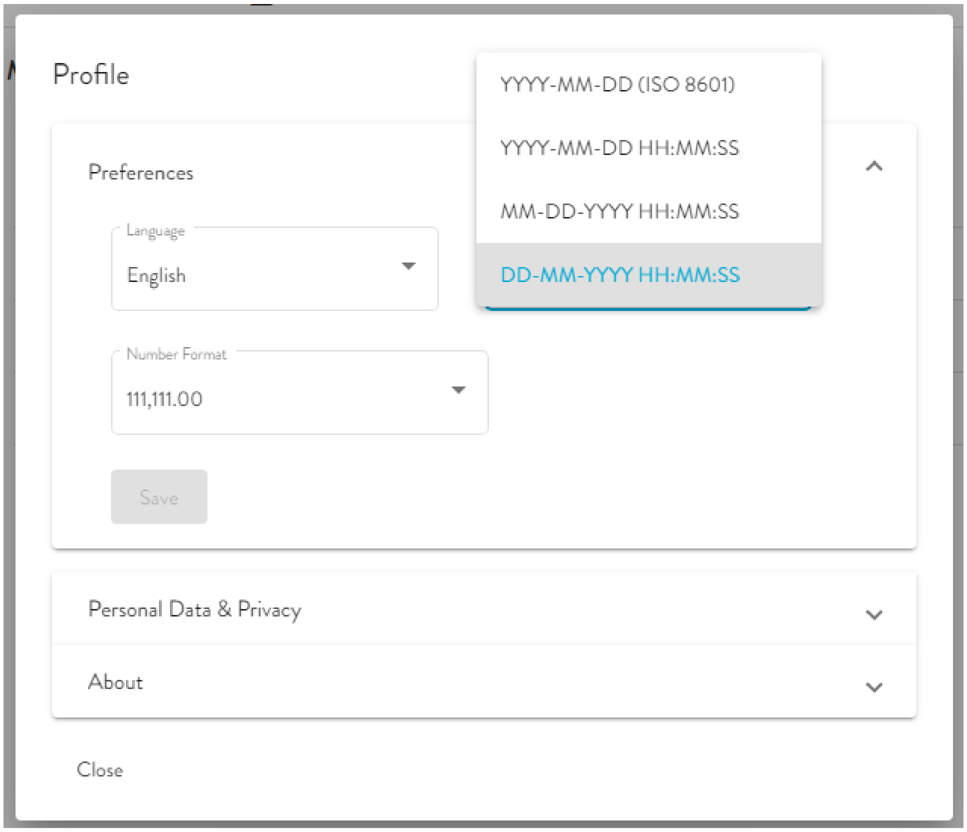
1. In the upper-right corner, click your login name, then click **Profile**.
2. Click **Preferences**.



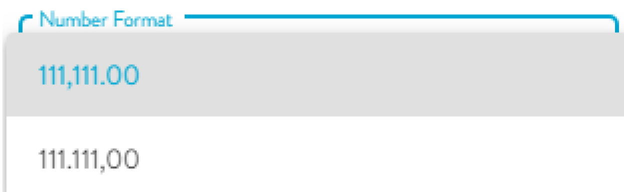
3. Click the drop-down arrow in each box to specify your preference.
    - Languages include English (default), 中文 (Chinese Simplified), 中文。(Chinese Traditional), Nederlands (Dutch), Français (French), Deutsch (German), Italiano (Italian), (Japanese), русский (Russian), Español (Spanish), and Türkçe (Turkish).



- Date Format options include YYYY-MM-DD (ISO 8601 format), YYYY-MM-DD HH:MM:SS, MM/DD/YYYY, or DD.MM.YYYY.



- Number Format options include 111,111.00 or 111.111,00



4. Click **Save**.
5. Click **Close** or anywhere outside of the dialog box to close it.

Refer to Personal Data and Privacy Settings for reviewing or editing your personal data or privacy rights.

Personal Data & Privacy Settings

In the **Profile** dialog box you can specify personal data and privacy settings. Before you can view or edit these settings, the EFT administrator must set various options on the **Site > Web** tab.

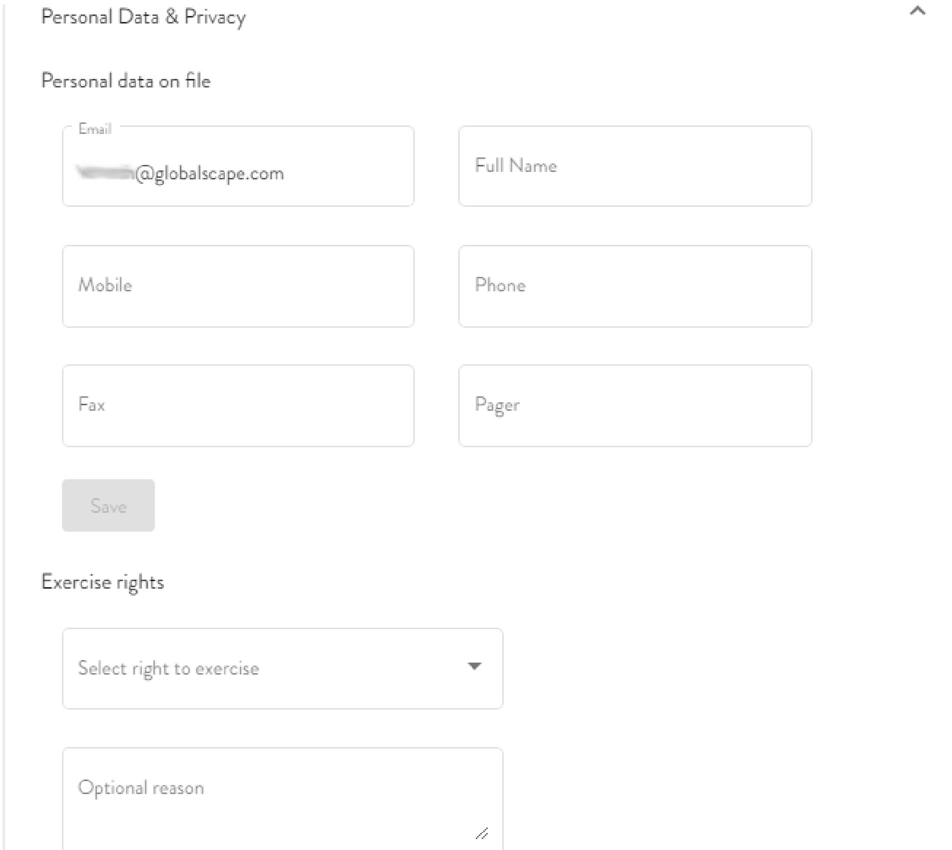
- If nothing is displayed when you expand **Personal Data & Privacy**, the EFT administrator has not configured that in the administration interface.
- Account details fields are not modifiable in the WTC for EFT users on an AD site.
- Account details fields are modifiable in the WTC for Guest users on an AD site.

When accessing EFT for the first time via FTP, FTPS, or SFTP, and the Privacy Policy consent is required for use, the connection will fail. The user must first connect via the Web Transfer Client (HTTPS portal) to consent to the policy.

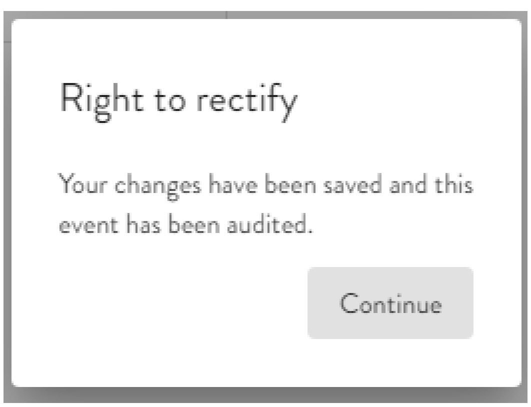
Depending on the privacy settings configured by the EFT administrator, restricting the use of your personal data (which can include your name and email address) may result in the **termination of the current session** to which you are logged in and the removal of your account from the server. If you are unsure about exercising your rights as described below, contact the administrator.

To change your personal data and privacy settings

1. In the upper-right corner, click your login name, then click **Profile**.
2. Click **Personal Data & Privacy** to expand the dialog.

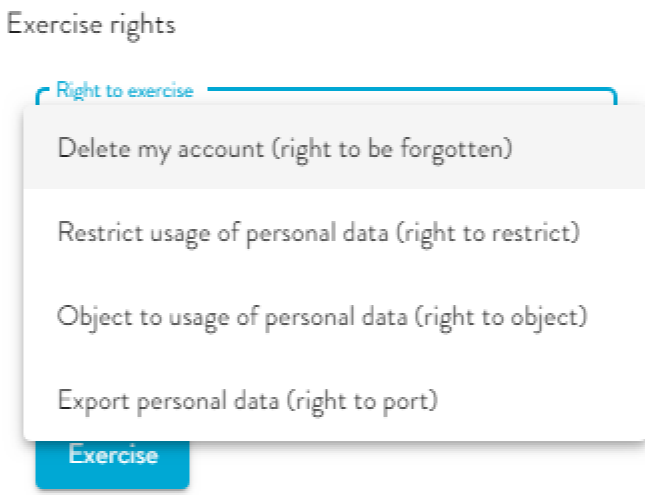


3. The **Personal data on file area** indicates which data is stored in EFT. By default the data is stored encrypted. If you change any of the settings, the **Right to rectify** message appears.

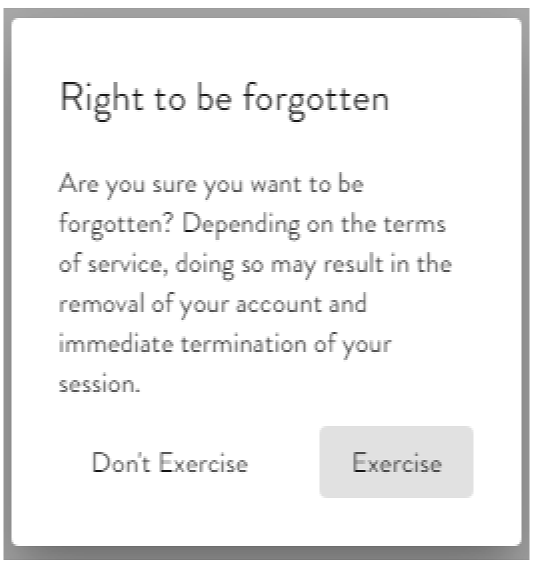


4. Click **Continue**, then click anywhere outside of the **Profile** dialog box to close it.

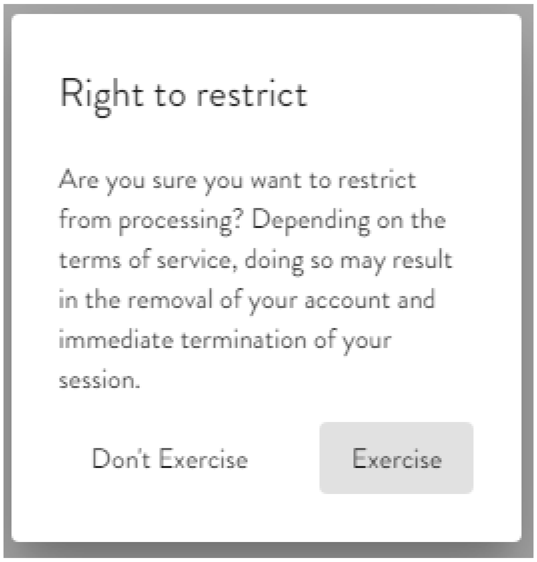
   The **Exercise rights** area enables you to exercise your rights to delete your account from the server, restrict use of personal data, object to use of personal data, and export your personal data. Each right is described below.



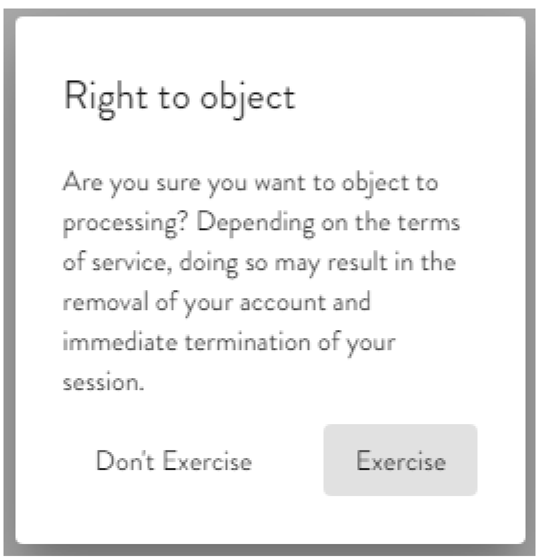
5. **Delete my account** - Depending on the Terms of Service, "forgetting" your account may result in the removal of your account and termination of the current session to which you are logged in. If you are unsure, click **Don't Exercise** and contact the administrator. Otherwise, click **Exercise**.



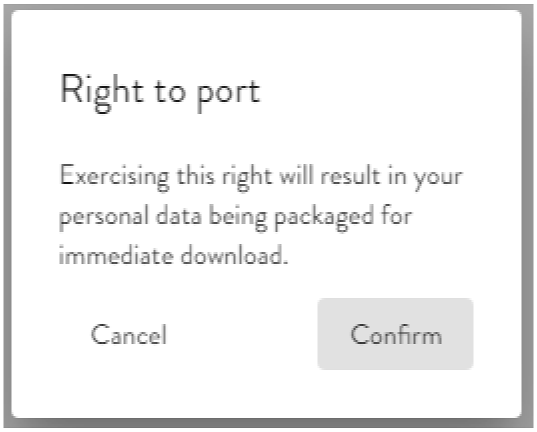
6. **Restrict usage of personal data** - Depending on the Terms of Service, restricting the use of your personal data may result in the removal of your account and termination of the current session to which you are logged in. If you are unsure, click **Don't Exercise** and contact the administrator. Otherwise, click **Exercise**.



7. **Object to usage of personal data** - Depending on the Terms of Service, objecting to the use of your personal data may result in the removal of your account and termination of the current session to which you are logged in. If you are unsure, click **Don't Exercise** and contact the administrator. Otherwise, click **Exercise**.



8. **Export personal data** - This option packages your data in a JSON (text-based) file and saves it to the Downloads folder specified in your browser. You can review the file in any text editor, such as Notepad.



9. Click **Confirm** to begin the download.
10. Click **Close** or anywhere outside of the **Profile** dialog box to close it.

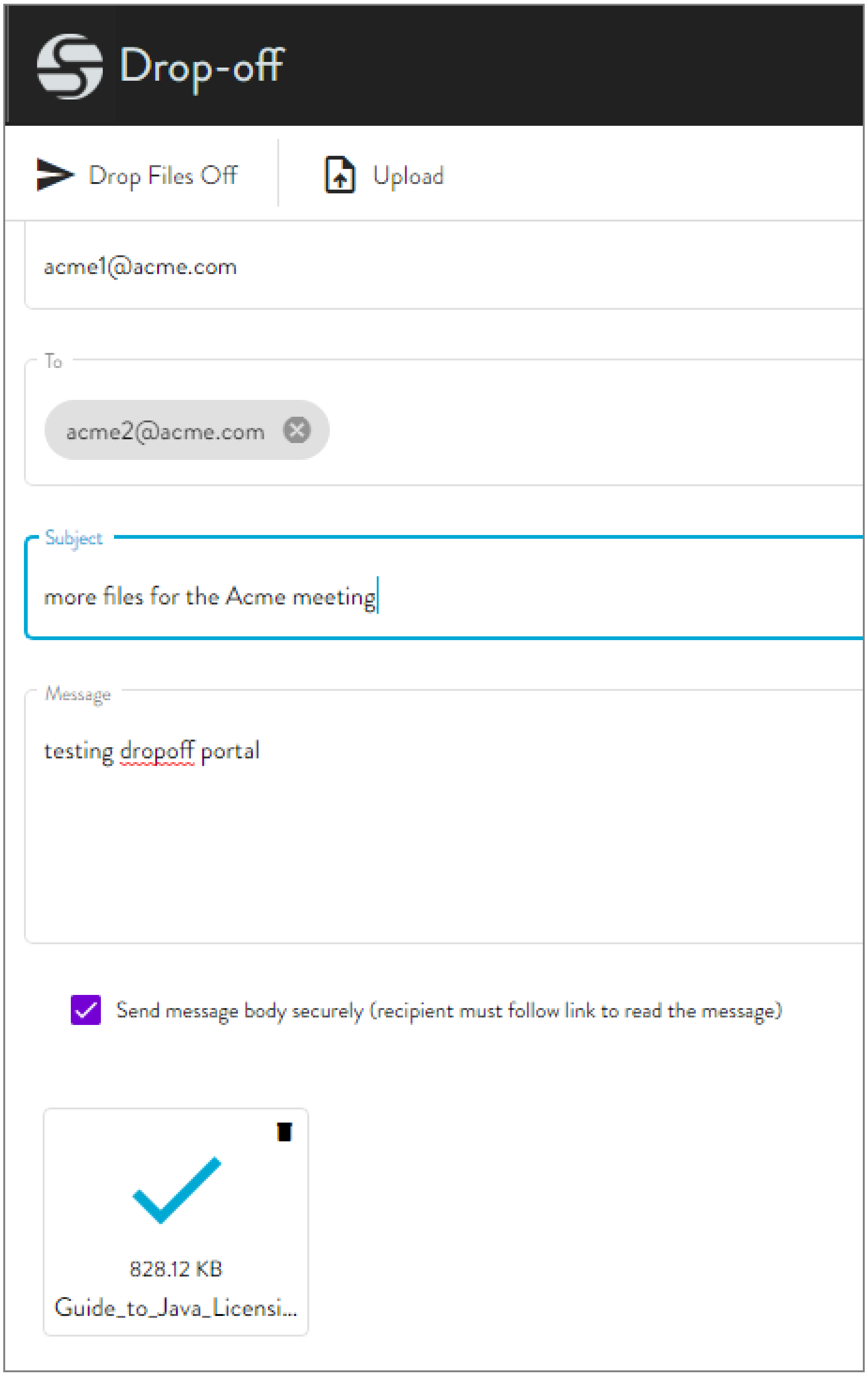
Drop Off Page

The Drop-Off page can be used by external users to send files to internal users on demand (ad hoc), without creating user credentials.

- **A Workspaces license is consumed for each Drop-off page message** no matter how many recipients the message has. A license is not consumed on replies. A license is not consumed on Send messages. You can avoid Workspaces licenses being consumed by the Drop-off page by disabling the Drop-off page. It is not enabled by default.
- When someone uses the Drop-off page, that person becomes a "Workspaces owner." This is because behind the scenes, a temporary, anonymous account is created to host the Workspace, thus consuming a license (assigned to that account). Once the space expires, the anonymous account is also removed, and the license is released to the pool.

To send a file using the Drop-Off page

1. In your browser, go to the URL provided. The Drop-Off page appears. (Your administrator or an internal user will provide the address. URL can be found on the **Site > Web** tab in the Drop-off page configuration.)



2. In the **From** box, provide the email address at which you want to receive responses.
3. If the **To** box is enabled, you are limited to addresses in the domains defined by the administrator or to lists defined in the EFT administration interface.

4. In the **Subject** box, provide a clear topic of the email. (that is, "Files for Wednesday's Acme project meeting" is clearer than "The files you wanted.")
5. In the **Message** box, provide a brief reason for the email.
6. Drag and drop or click **Upload** to select files to attach to the email. If CAPTCHA is enabled, you must complete the CAPTCHA before you attempt to attach files to the portal. Otherwise, the files won't attach.
7. (Optional) To send the request securely, select the **Send message body securely** check box.
8. Click **Drop Files Off**. A confirmation message appears.
9. If you want to send another file, click **Do it Again**. If the send was not successful, an error message appears. Click **Try Again** to verify the email address and resend the email.
10. The recipient will receive an email with a download link. If the recipient has an account on EFT and signs in to the Pick-Up page, the recipient can reply to the sender.

Pick Up Files

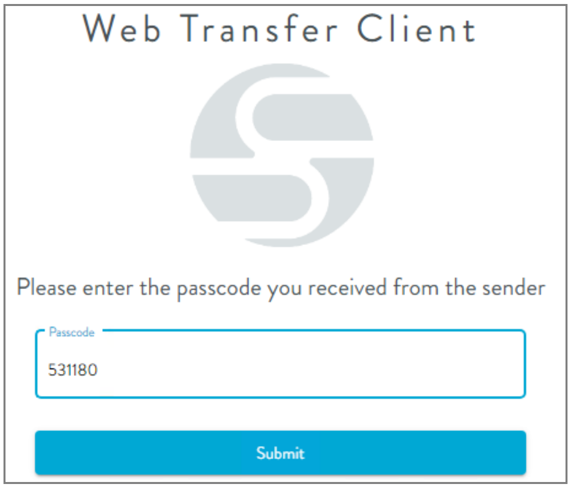
After a Workspaces or EFT Outlook Add-In user sends one or more files, the recipients can click a link in the email that they receive that opens their default browser to the Workspaces Pickup page.

Depending on the administrator's settings, the files might be available for download only once, after which the download links will expire.

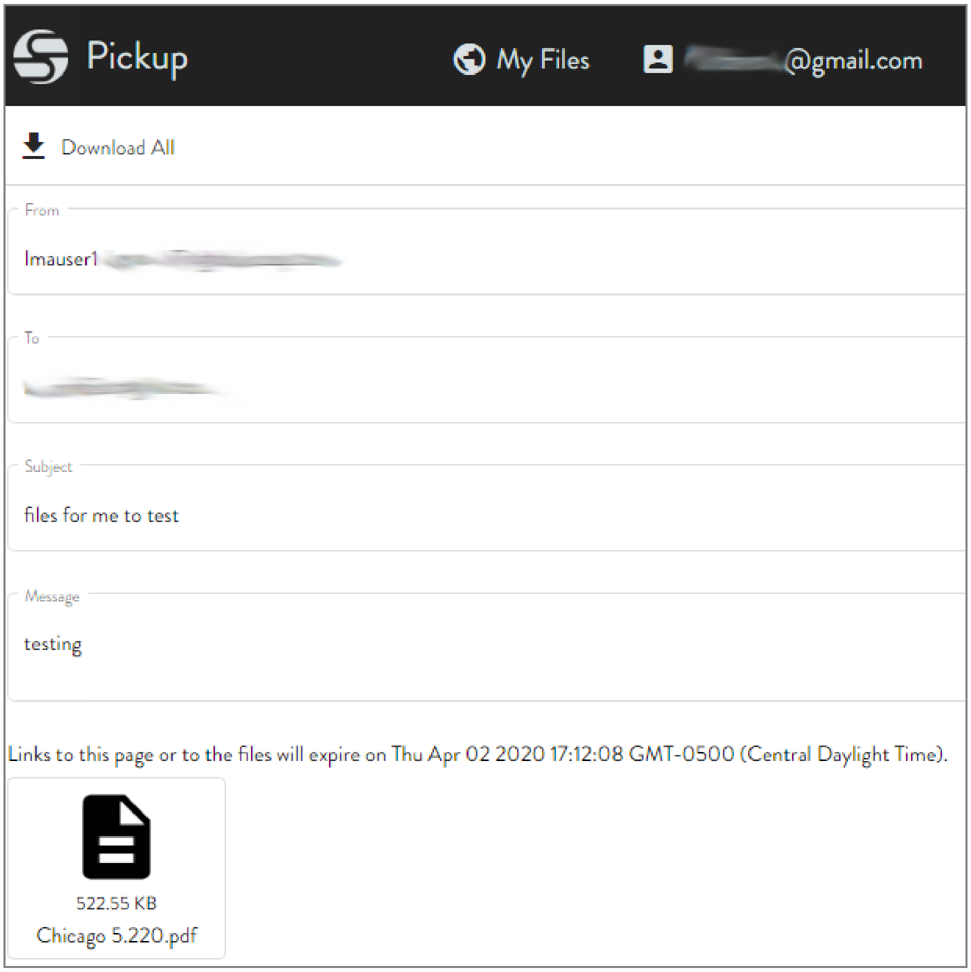
In certain browsers, if you are using a self-signed certificate you will receive a "network issue" warning when downloading files. Workarounds are to have a valid certificate, use special flags to ignore improper certificates, or not use HTTPS.

To download files in the Pickup page

1. In the notification email, click the **Workspace** link. The default browser opens.
2. If the sender has specified password-protected pickup, a login page appears. The sender should have sent you the passcode in a separate email, text, or phone call.



3. Provide the passcode, then click **Submit.**



4. Select one or more files and click **Download Selected** to download multiple individual files or click **Download All** to download all of the files. The files are saved in the browser's downloads location.

Reply to Messages

After you have received a message sent through Workspaces, you can reply to the email (if so configured) and send files back.

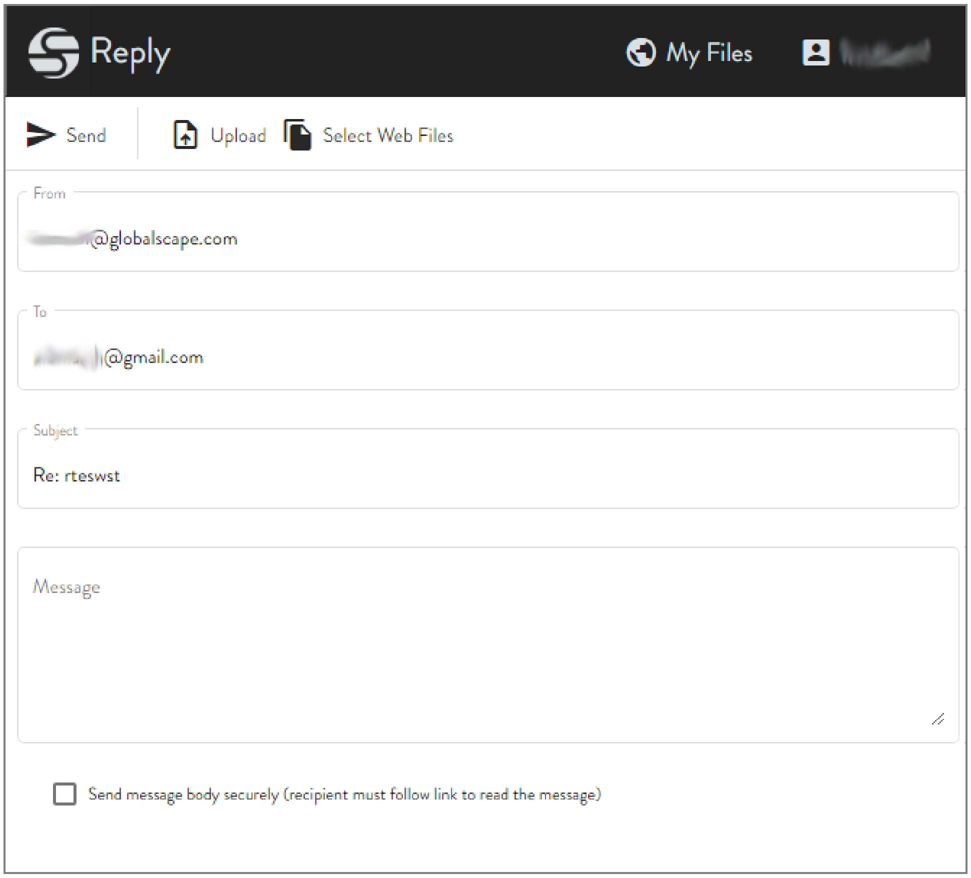
> **NOTE:** The Send and Reply portals must be configured by The EFT administrator.

Reply and **Reply All** buttons are displayed under the following conditions:

- For anonymous recipients, if the sender has enabled replies
- For authenticated recipients:
  - if the Workspaces license limit is not exceeded (during trial)
  - if Allow recipients to reply check box has selected (by administrator)
  - if Workspaces and Send Files are both enabled (by administrator)
- **Reply All** button is not displayed if sender is the only available recipient on the thread.
- The alias name is displayed if any recipient is from an alias list

To reply to the email

1. Click the **Workspaces** link in the email. The **Pick Up** page appears.
2. Click **Reply**. The **Reply** page appears.



3. The **From**, **To**, and **Subject** lines are completed for you. Compose a **Message**, "drag and drop" or browse for files, then click **Send Message**.
4. If the reply is in response to a request for files, the **Send message body securely** check box appears.
5. Complete the email and click **Send**.

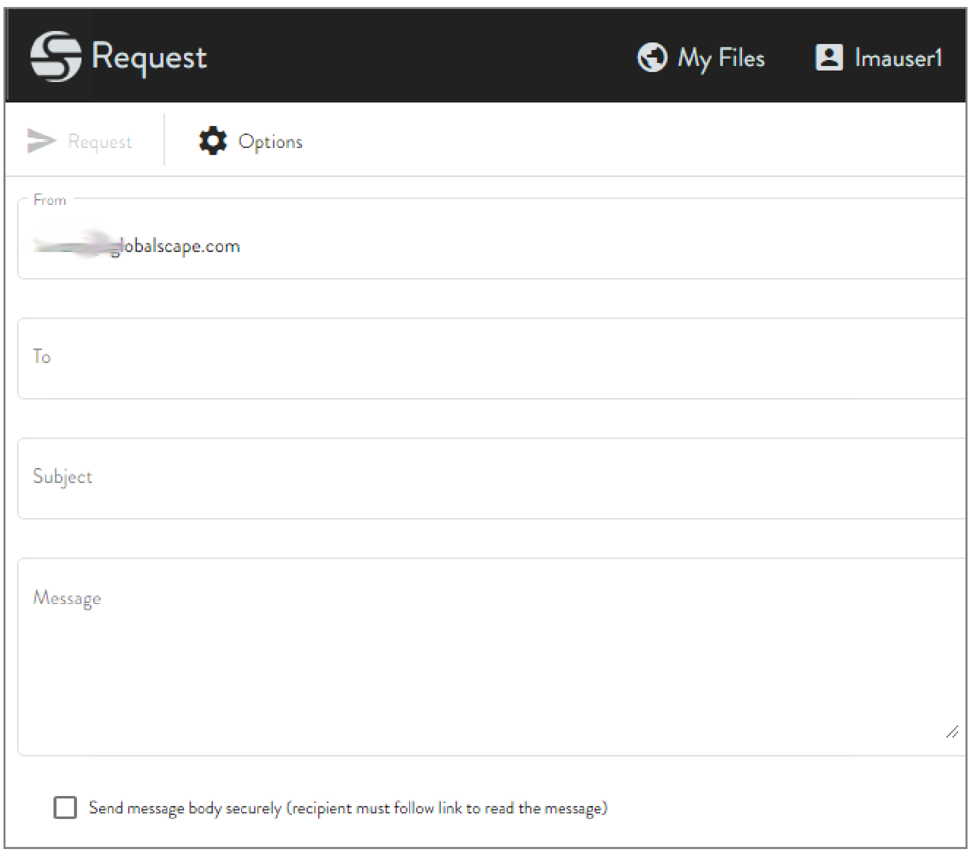
Request Files

In the Web Transfer Client, a user can request files from another user, if Workspaces is enabled to send files.

> **NOTE:** Both the Send and Reply portals must be enabled to request files.

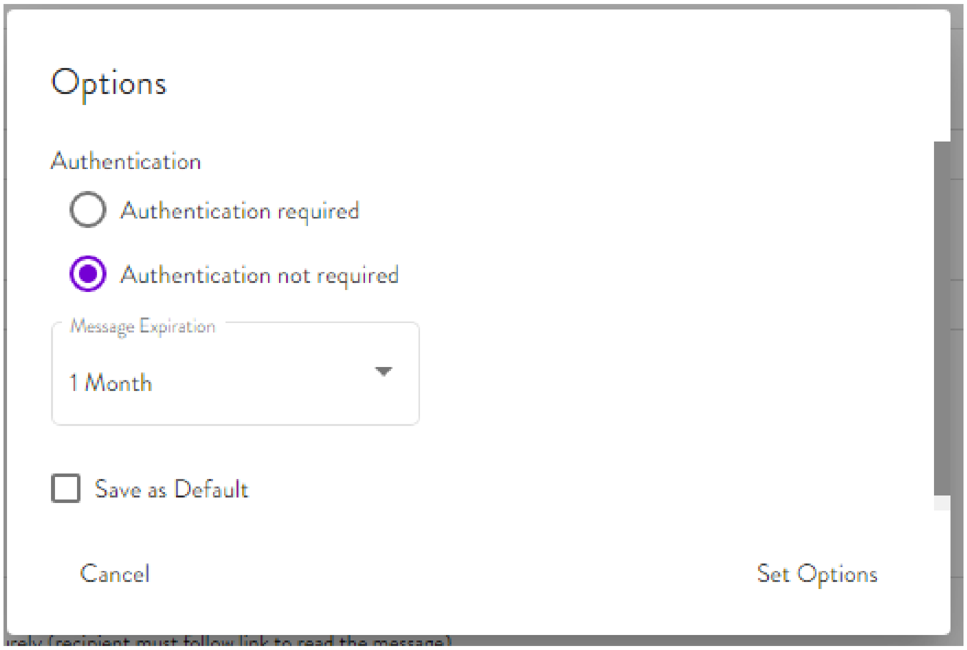
To request files

1. Click the **Request Files** icon. The **Request Files** window appears, and the **From** address is completed for you.



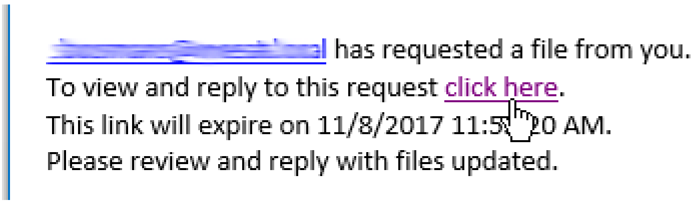
2. Provide the **To** address, **Subject**, and **Message**.
3. To send the request securely, select the **Send message body securely** check box. In this case, the recipient will have to click a link to read the message, instead of the message being displayed in the email.

4. Click **Options**.



   a. Under **Authentication**, specify whether you want the recipient to log in to download the file. If you click **Authentication not required**, you also have the option to select **Unauthenticated users can respond** to the email. When the check box is not selected, an unauthenticated user can download the file, but cannot respond in the portal.
   b. Under **Message Expiration**, specify how soon the message is to expire: 1 day, 1 week, 1 month, or immediately. (See note below about expiring immediately.)
   c. Select the **Save as Default** check box if you want to save these options for future file sends.
   d. Click **Set Options** to save your settings.
5. Click **Apply** to accept Request Options.
6. Click **Send Request**.

   The recipient will receive an email similar to the one below. The last line is the Subject line of the request email.



7. The recipient should click the "click here" link to open the Reply portal in which the recipient can attach the requested files to send to the requestor.

   If the message is set to immediately expire, do not leave the page or click refresh without responding or attaching the requested files. If a recipient clicks on the link and then clicks refresh, all the fields go blank. If the user clicks the link in the request file email again, then they are presented with a "404 object not found" error and you will have to inform the requestor to send their request again (or send the files via other means).

8. The recipients can view their received messages by clicking **Received Messages** in the left pane.

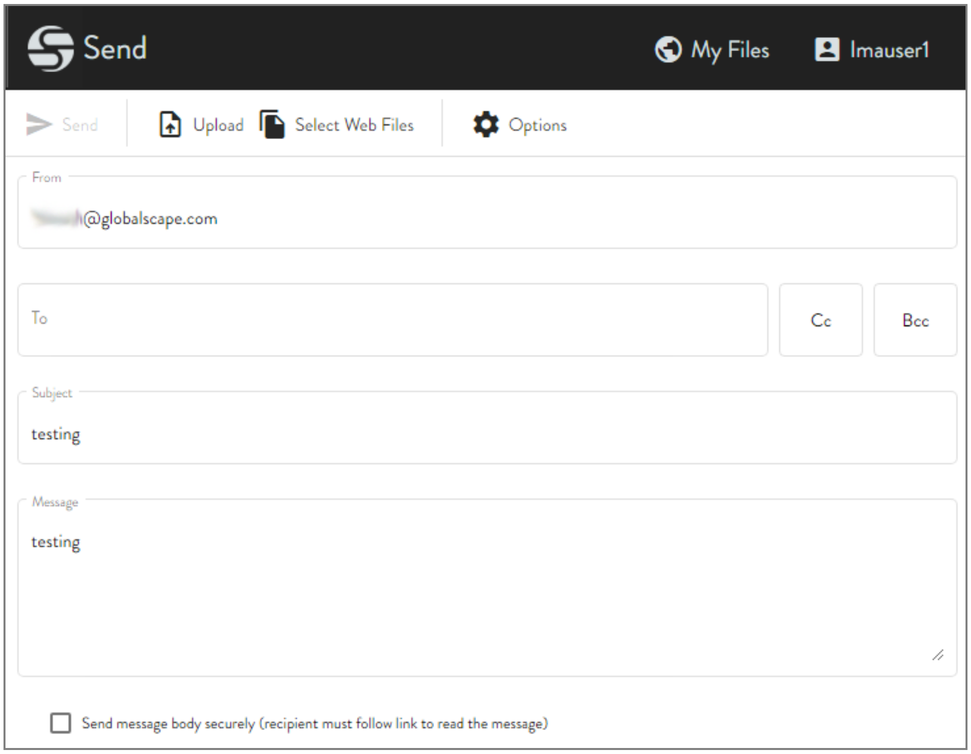
Send/Email Files in Workspaces

EFT users who want to add files that are either located in their local machine or are in Workspaces can do so securely. Recipients of those files can pick up the files in their default browser.

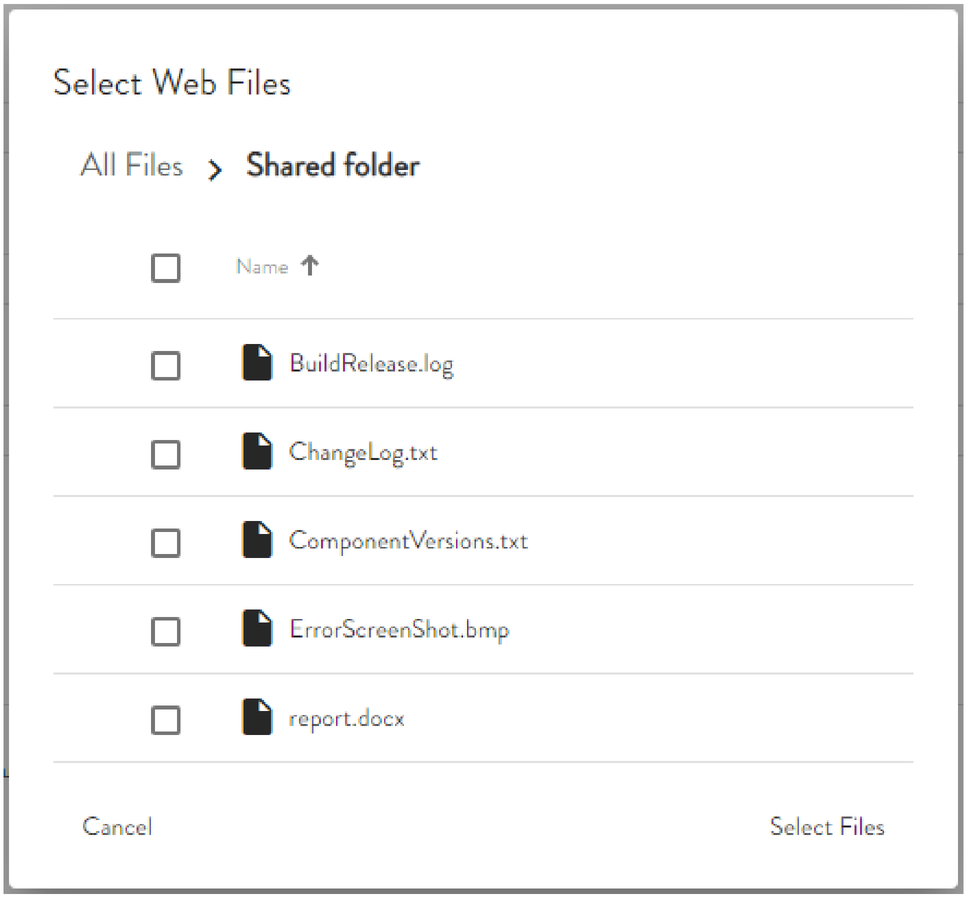
- The browser will timeout after a period of inactivity. Files that are being uploaded are considered "activity." Idle timeout occurs if you leave the browser open and stop composing your message with no activity. Upon timeout, the draft is lost. An "about to timeout" warning prompt is displayed when timeout is imminent, giving you the opportunity to keep the session alive.
- When you send a file using Workspaces, a "WorkspacesSendMessage" folder is created in the Virtual File System (VFS).
- You can send a secure message in Workspaces without an attachment, however, you cannot expire the message immediately without an attachment.

To email files

1. Log in then click the **Send** icon on the toolbar. The **Send files securely** form appears.

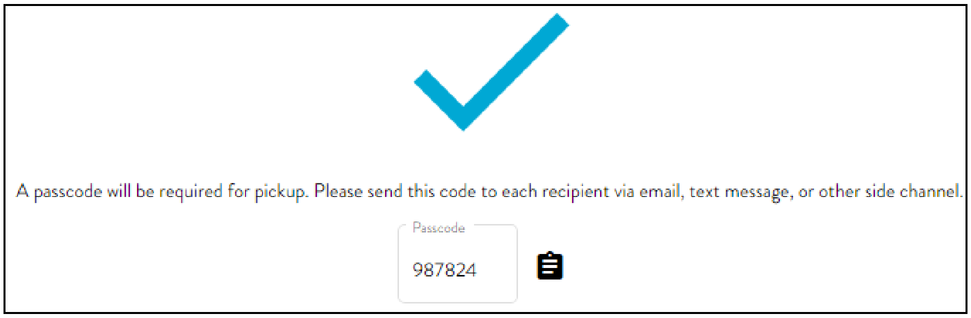


2. To attach files, drag and drop them on to the page, or click **Upload** or **Select Web Files**.
   - If you click **Upload**, the Windows **Open** dialog box appears for you to select your files, and then click **Open**.
   - If you click **Select Web Files**, the **Select Web Files** dialog box appears.

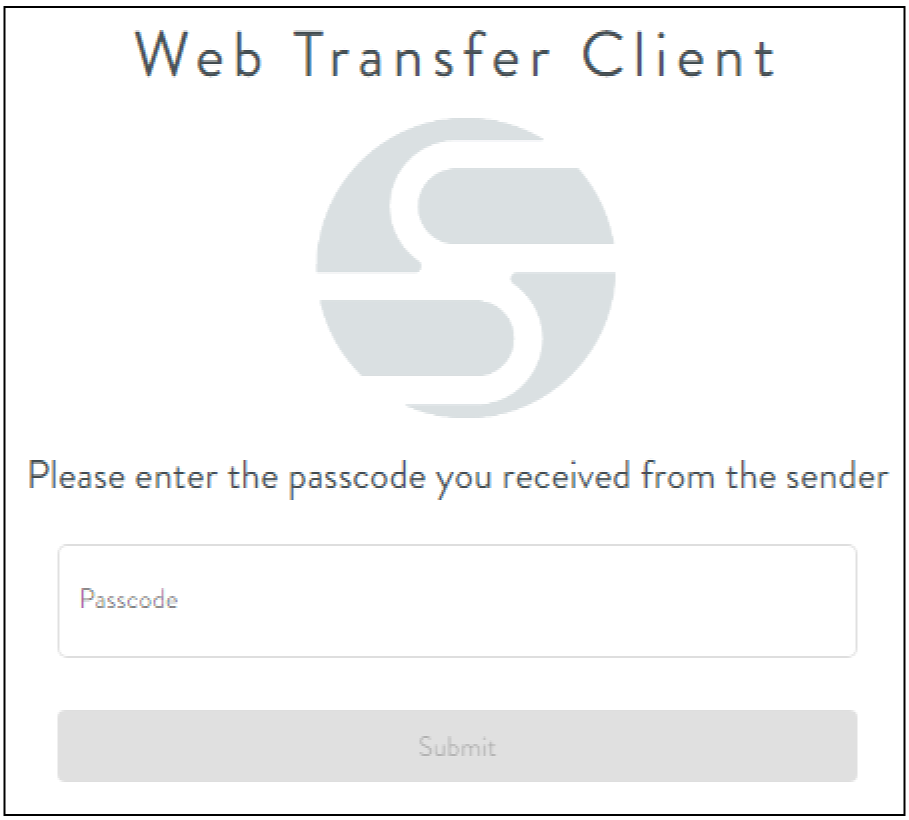


- Specify the folder that contains the file(s) you want to send, then select the files, and click **Select Files**.

3. Select the **Send message body securely** check box to send a secure message. In this case, the recipient will have to click a link to read the message, rather than the message being displayed on the Pickup page.
4. Select the **Passcode required** check box if you want the recipient to provide a passcode to download the file.
   - When this check box is selected, after you click Send, an automatically generated passcode appears.

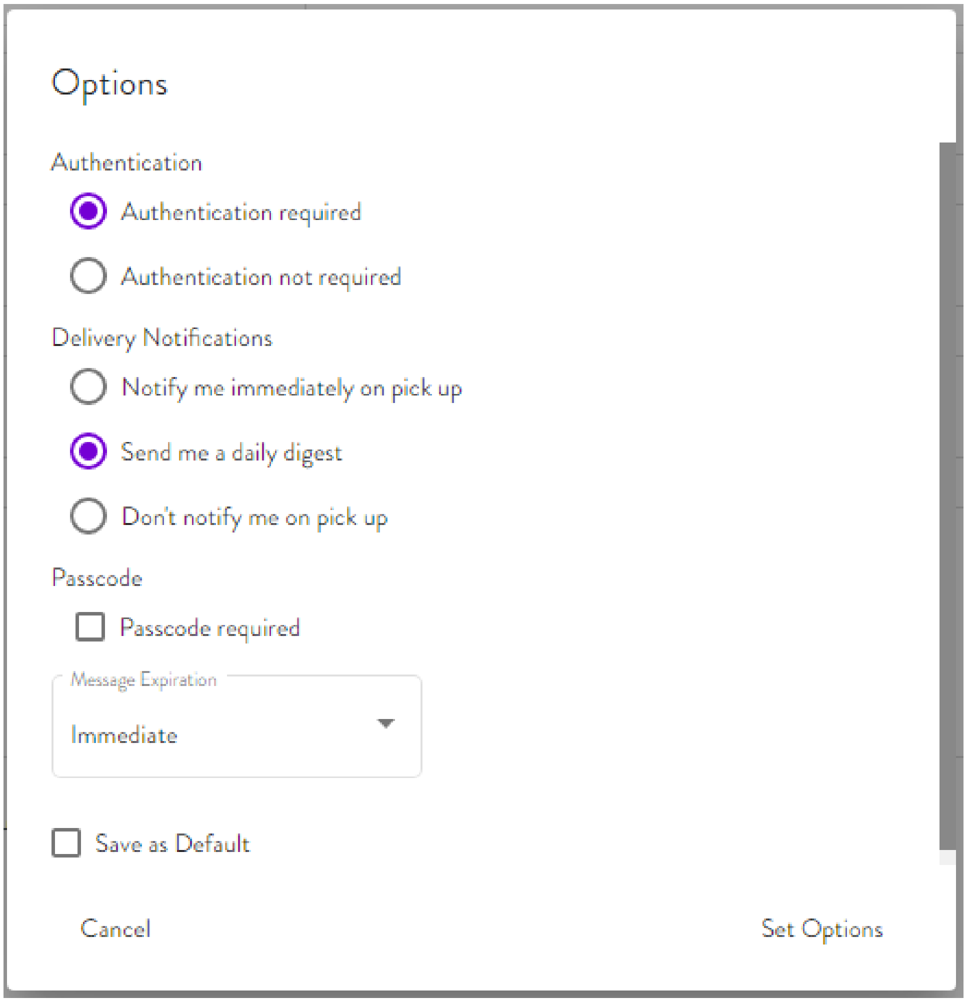


- Send the passcode to the recipient in a separate email, text message, or phone call. When they click the link to download the file, a passcode message appears.



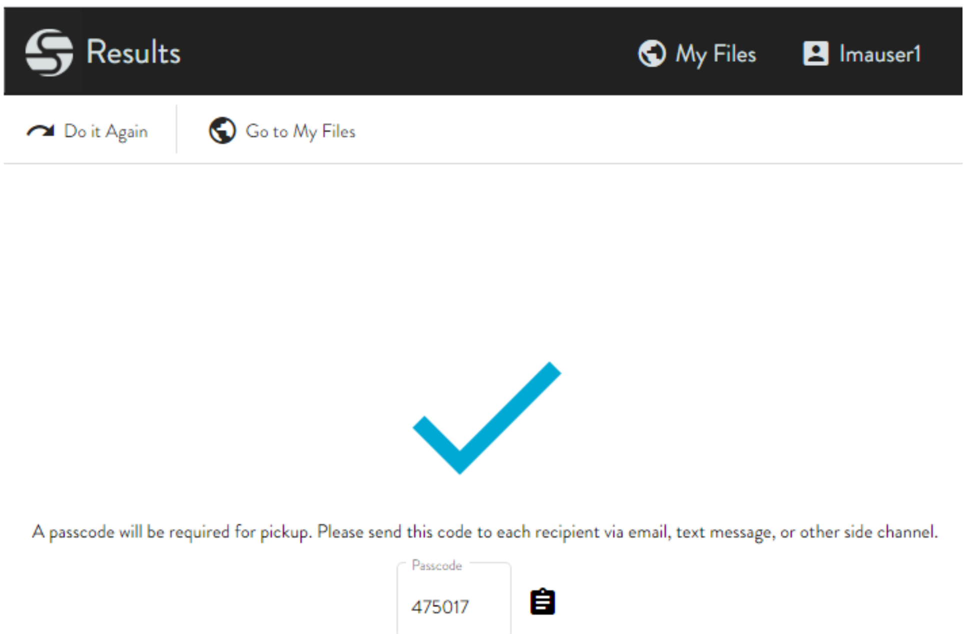
- The recipient must enter that passcode to be able to download the file.

5. To specify message options, click **Options**.



6. Under **Authentication**, specify whether you want the recipient to log in to download the file. If you click **Authentication not required**, you also have the option to select **Unauthenticated users can respond** to the email. When the check box is not selected, an unauthenticated user can download the file, but cannot respond in the portal.
7. Under **Delivery Notifications**, specify If and when you want to be notified when a file you have sent is downloaded.
8. Under **Passcode**, select the **Passcode required** check box if a passcode is required to download the file.
9. Under **Message Expiration**, specify how soon the message is to expire: 1 day, 1 week, 1 month, or immediately. In v8.0.2 and later, you can send a secure message without an attachment, however, you cannot expire the message immediately without an attachment. (The dialog box does not display the date it will expire.)

10. Select the **Save as Default** check box if you want to save these options for future file sends.
11. Click **Set Options** to save your settings.
12. Click **Send**. A message appears indicating whether the message was sent successfully or not.
13. If you selected the **Passcode required** check box, after you click Send, a **Results** page appears and displays the passcode that your recipient will need to pickup the file.



   - Click the clipboard icon to copy the passcode to your clipboard, then paste the code into an email or text message or other side channel.

   The **Not Sent** message appears if you have EFT configured to send only to EFT users (most restrictive) and you try to send to non-EFT users. If you need to send to user accounts that are not defined in EFT, your EFT administrator will need to either change the setting on the **Web** tab of the EFT Site, or add the account as an EFT user.

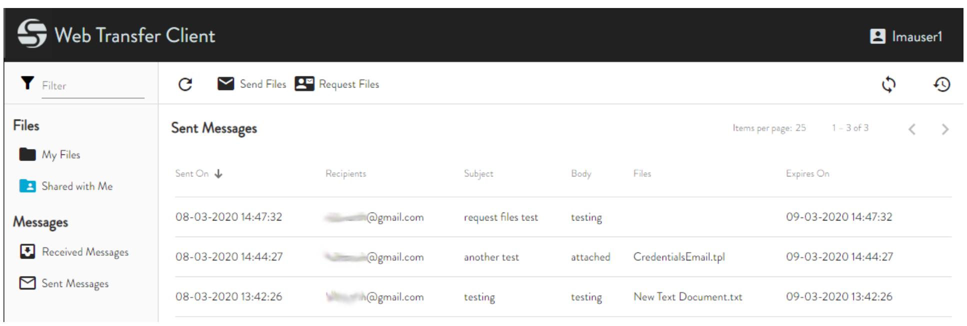
14. If sending the message was successful, the recipient(s) receive an email with a link to pick up the files.

15. The items that you send will appear in the **Sent Messages** view. This includes messages sent to request files.

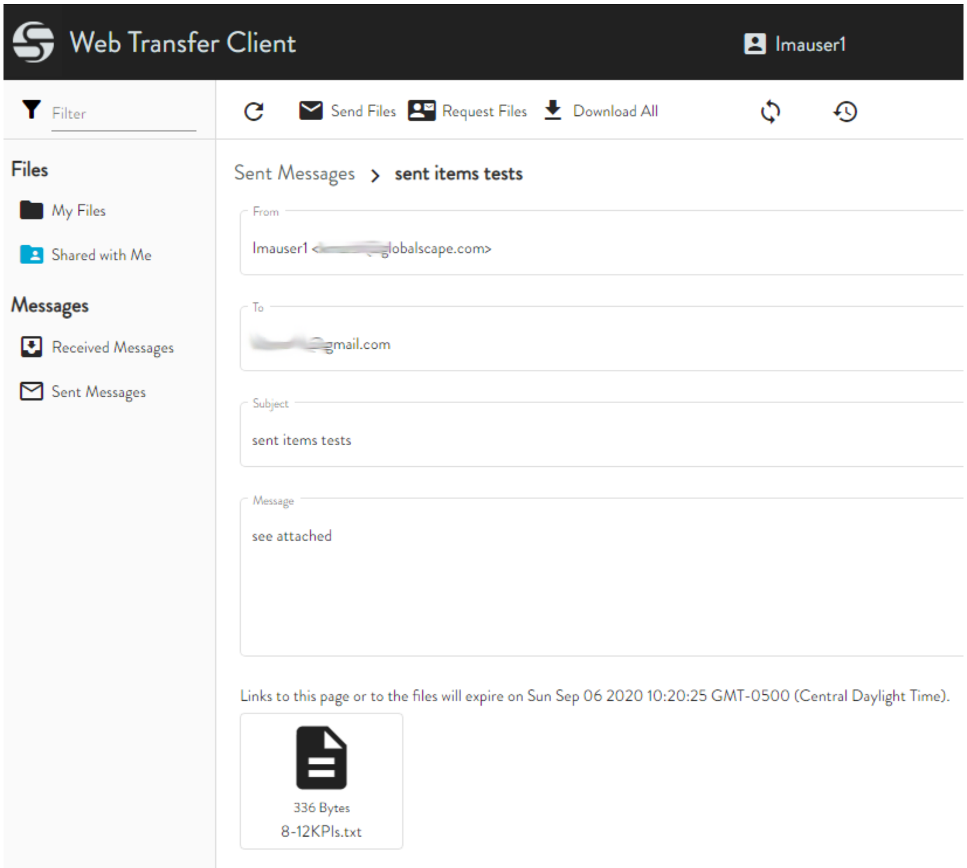
Viewing Sent Messages

Workspaces users can view a list of the messages they have sent, and their attachments. Once the items expire (if the EFT or user have set an expiration), those items are no longer viewable.

- The last 50 items that you sent will appear in the **Sent Messages** view.
- The list includes messages sent to request files.
- The column width is limited to 101 characters and no more than 4 filenames and 4 recipients.



- As shown above, the messages are listed by and can be sorted by the **Sent On** column. Click a message to open it.

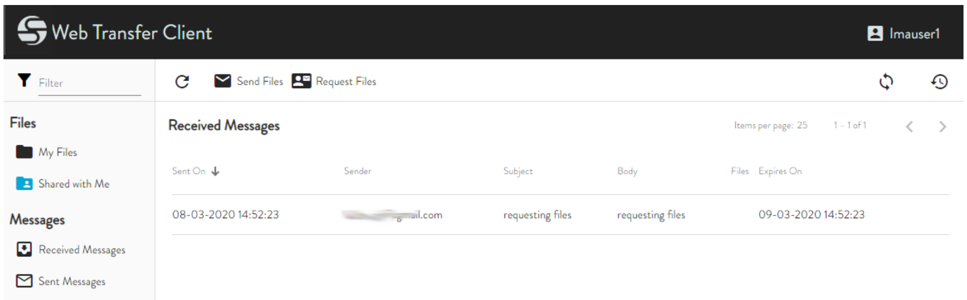


- You can download the attachments on a message, and they are saved in your browser's Downloads folder.
- Expired items are removed immediately and not able to be viewed in Sent Messages window.

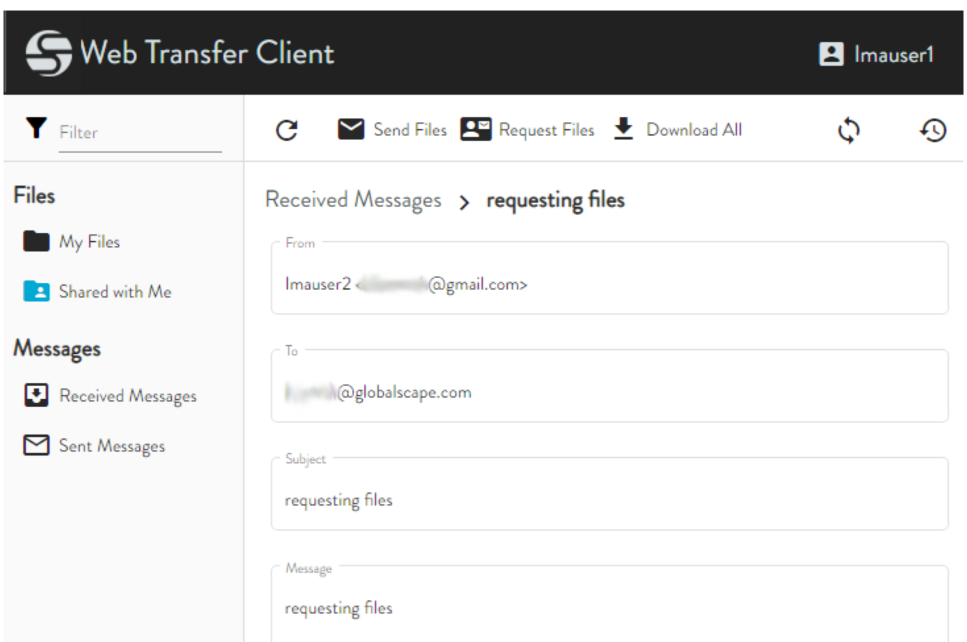
Viewing Received Messages

Workspaces users can view a list of the messages they have received, and their attachments. Once the items expire (if the EFT or user have set an expiration), those items are no longer viewable.

The recipients can view their received messages by clicking **Received Messages** in the left pane. A list of received messages appears.



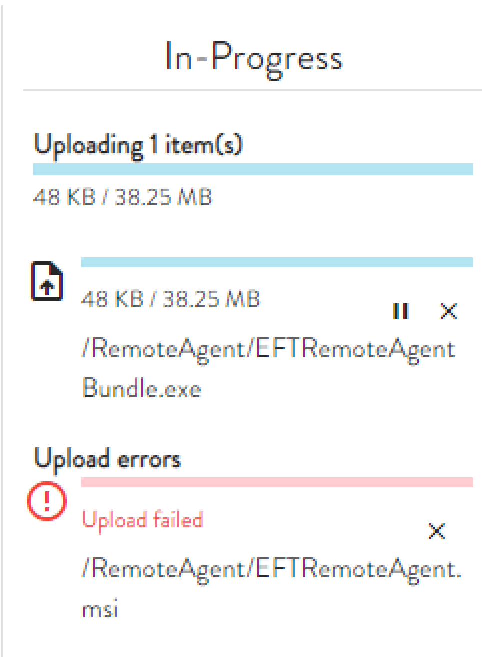
- As shown above, the messages are listed by and can be sorted by the **Sent On** column. Click a received message to view the message.
- EFT will return the last 50 records of ad hoc transactional data.



- Download the attachments on a message by clicking **Download All**. If an expiration was set, the expiration date and time appear at the bottom of the message.
- Expired items are removed immediately and not able to be viewed in Received Messages window.

Viewing Transfer Status

A Workspace owner or a participant can view the progress of files being transferred in Workspaces. Once the transfer is completed, the transfer status goes away, but the **In-Progress** panel remains open. If the transfer failed, the **In-Progress** panel displays which transfer failed. The client will remember the last state (open or closed) of the pane.



To view a Workspace's in-progress transfers

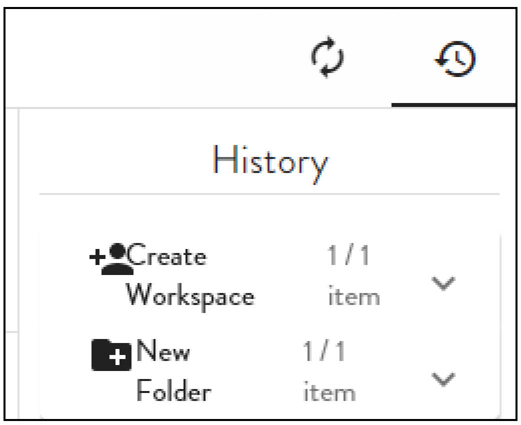
1. Before uploading or downloading files, open the **In-Progress** panel by clicking the rotating arrows icon  .
2. Initiate the transfer. The progress will appear in the panel. Note that smaller files will barely display before completing.

View Workspaces History

A Workspace owner or a participant can view a consolidated list of transactions (History) related to the Workspace.

To view a Workspace's history

1. Click the History icon in the upper right. The actions that have occurred while your session is open will appear here. If you send a file and then click Go back to My Files, the History panel is cleared.



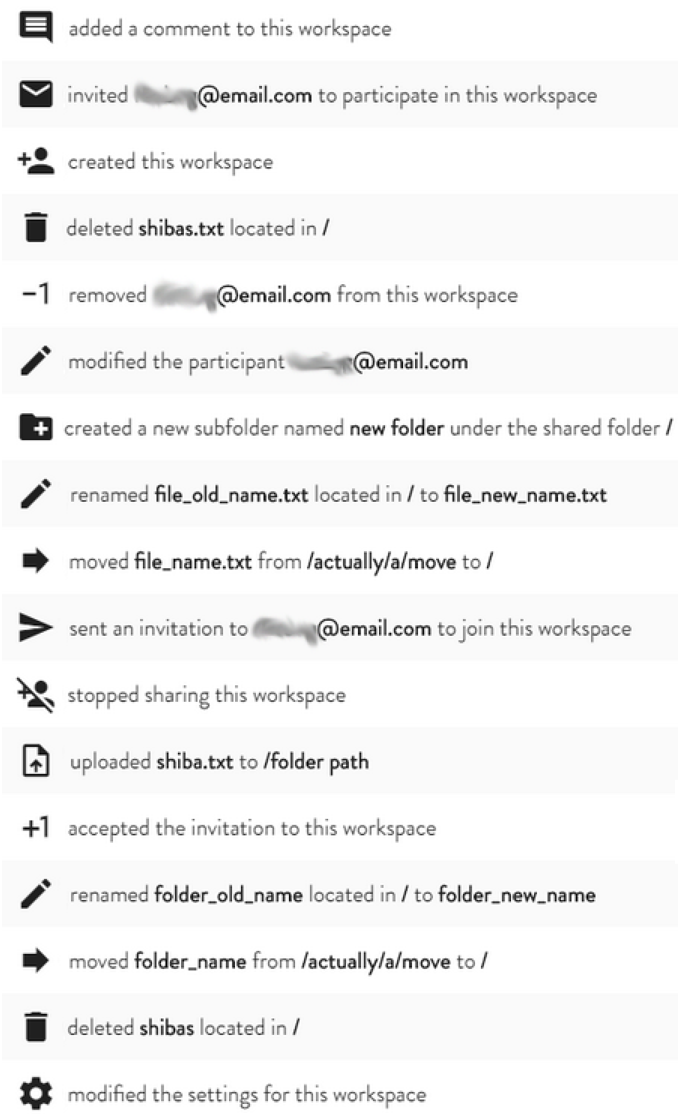
2. As the **owner** of the Workspace, you can view your activities and participant's activities:

    - A Workspace **owner** can view a list of Workspaces operations for Workspaces you created (own), regardless of the initiator of that operation

    A Workspace **participant** can view a list of Workspaces operations by selecting the check box next to the shared folder, then click **View Workspace**. The **View** dialog appears and shows the operations that the owner or they initiated, depending on whether it is a public or private workspace:

        - **PUBLIC** Workspaces that they are members of, regardless of the initiator of that operation
        - **PRIVATE** Workspaces that they are members of, only for operations initiated by them or the owner

The icons to the left of each item provide a quick glance of which operation was performed:



- When a workspace is deleted, the history records related to that workspace are removed. The files within the folder that is deleted (or moved) are not recorded separately in history as deleted (or moved).
- When a participant leaves a workspace (but the workspace remains), the user no longer has access to new or historical records for that workspace.

- When a participant joins workspace after some period since creation, they will see historical records for that workspace since its inception.
- Resending a workspace invitation is recorded as a send.
- When an EFT administrator adds participants to the workspace in the VFS in the EFT administration interface, the history for that workspace displays an entry for each user as "modified" because the workspace itself was modified by the addition of that user.

Edit Notification Options

When you create a Workspace, you can specify how often you want to be notified regarding actions taken on the Workspace, such as when files are uploaded to your Workspace.

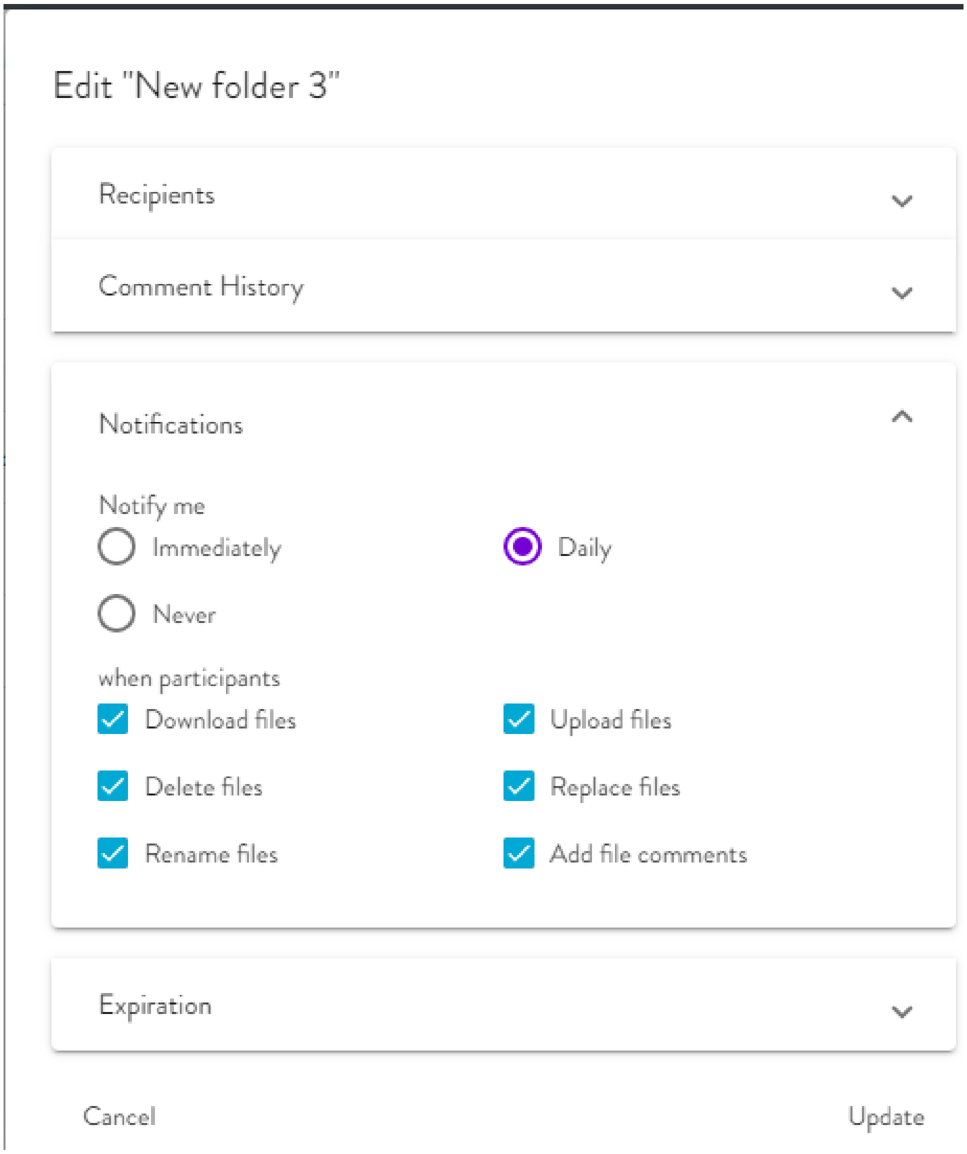
In the **Notifications** area, you can:

- Receive an email immediately after every action is taken
- Receive an email of all actions that were taken that day (sent at 12 am)
- Never receive emails on actions taken.
- Choose specific actions to be notified about, or none at all.

If you later want to change your notification settings, you can do so in the **Edit Notifications Options** dialog box.

To change notification options

1. On the toolbar, click **Edit Workspace**. The **Edit Workspace** dialog box appears.
2. Expand the **Notifications** area.



3. Make your changes and then click **Update**.

Notifications

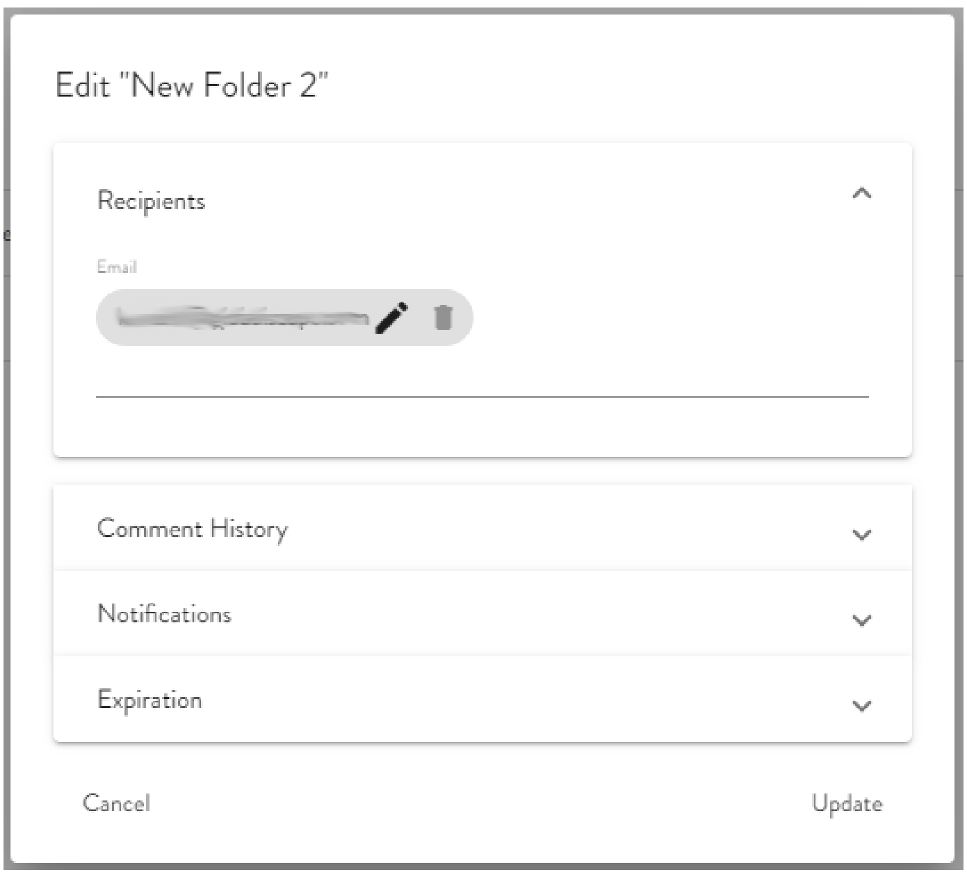
Each Workspace participant can configure notifications to let them know when actions are performed on the Workspace, such as uploading or downloading. The notifications are set to Daily for all actions by default.

The Workspaces owner is notified when the specified actions occur, in the form of:

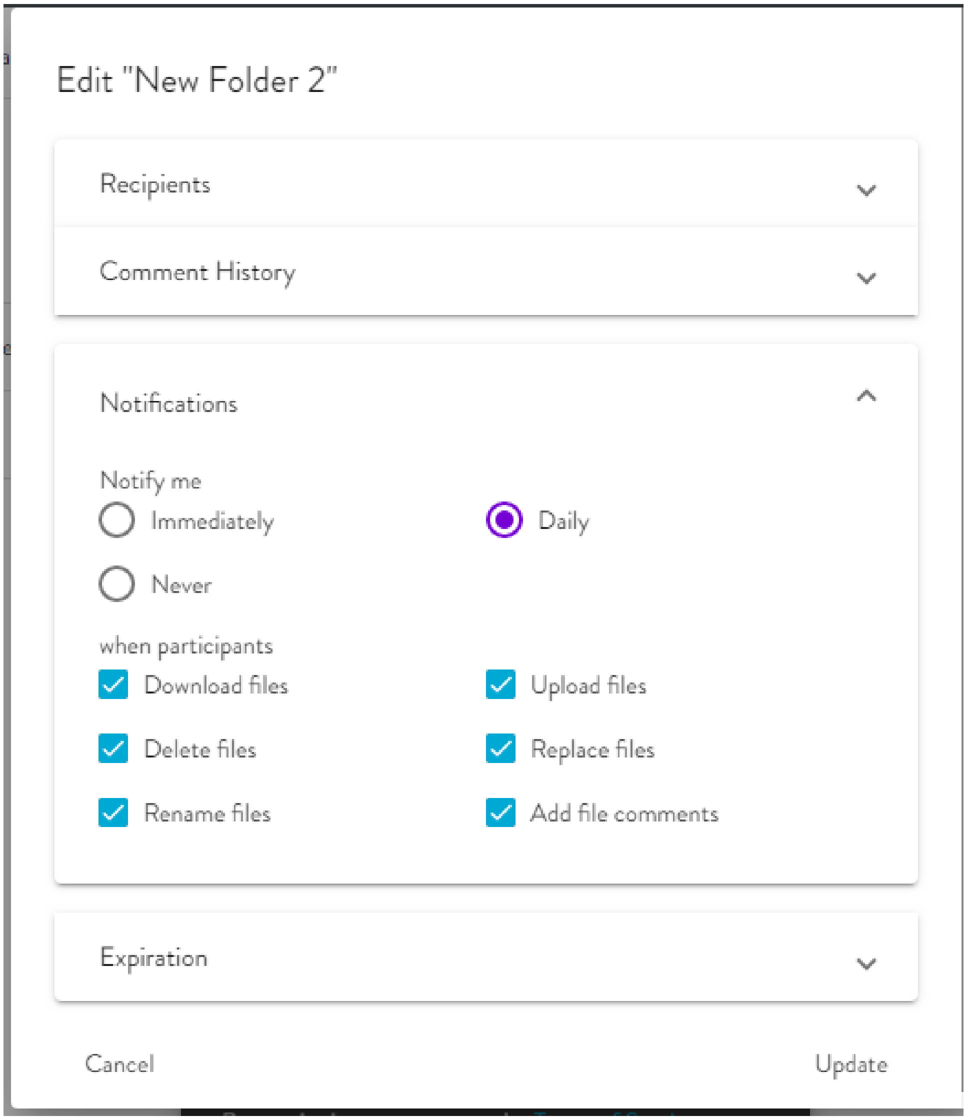
New Folder 2: EFT_HighAvailability_Datasheet_es-MX.docx was uploaded by Imauser2 from 127.0.0.1 on 8/28/2019 at 11:24:29 AM.
New Folder 2: EFT_HighAvailability_Datasheet_es-MX.docx was renamed by Imauser2 from 127.0.0.1 on 8/28/2019 at 11:25:03 AM.

To enable notifications

1. Select the check box for the folder for which you want notifications.
2. Click Edit Workspace. The **Edit** dialog box appears.



3. Expand **Notifications**.



4. Specify the notification frequency (the default is daily) and which actions to be notified about (all are selected by default).
5. Click **Update** to save your changes.

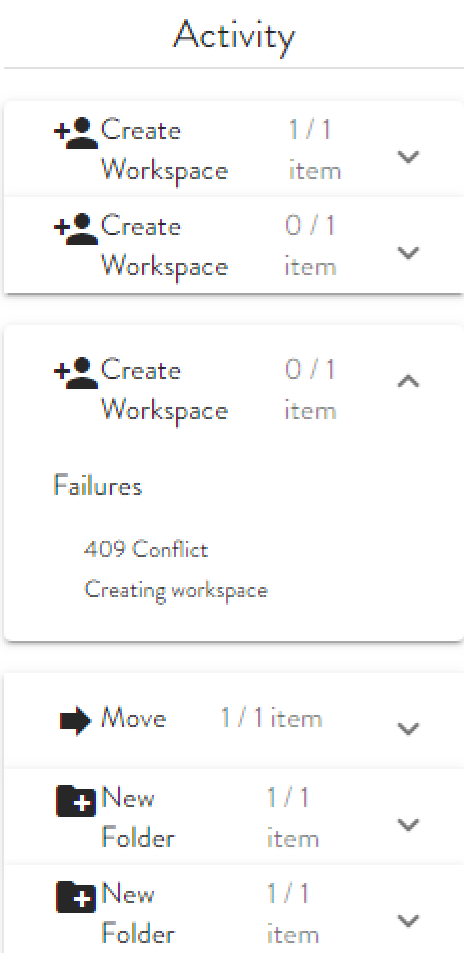
Messages

Messages and prompts appear for a variety of scenarios in the Activity pane. Click the down arrow next to the item for more information.

For example:

```
409 Conflict Creating workspace
```

means that there was a problem creating the workspace.



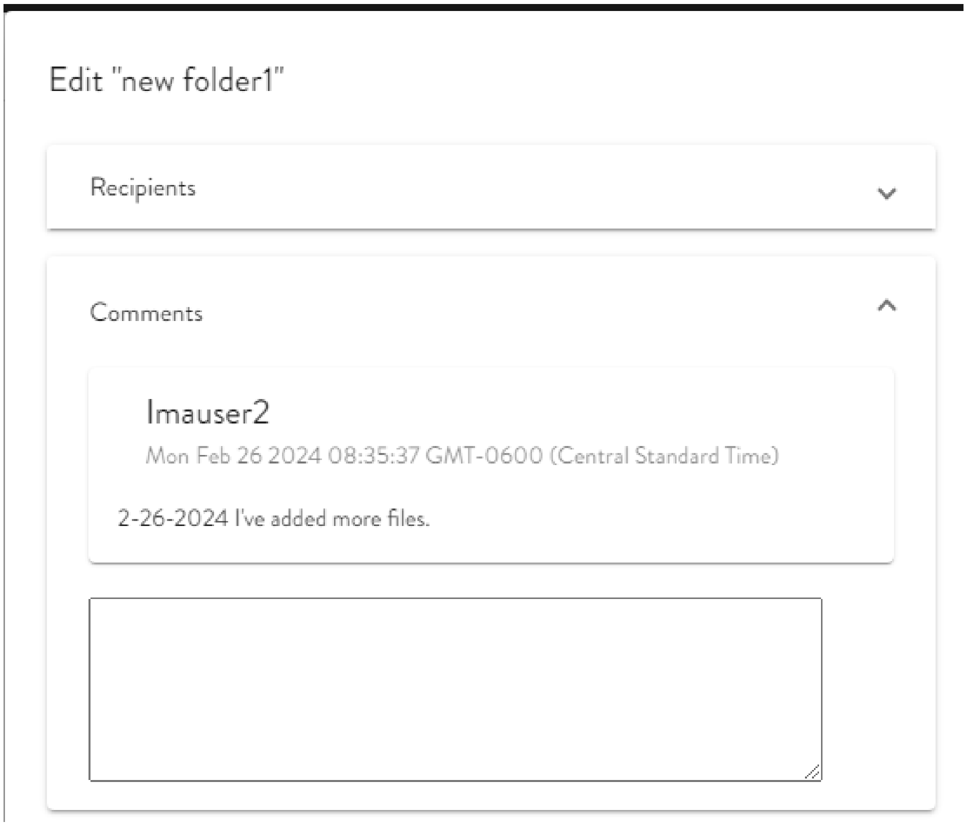
Workspaces Comments

You can add comments to a shared Workspace. You can also view the comments that have been added. All participants in this shared folder can read the comments.

To view or add comments to a shared Workspace

1. Click the check box next to a shared folder.
2. The toolbar updates to show more options. Click **Edit Workspace**.

3. Expand the **Comments** section. If no comments have been added, the **Comments** box is blank.



4. To add comments, type in the text box, then click **Update**.

File-Naming Conventions

- You can name files using almost any character for a name, except for the following reserved characters:
  < > : " / \ | ? * %
- The maximum length for a path is 255 characters. This limitation includes the drive letter, colon, backslash, directories, subdirectories, filename, and extension. If the relative path is too long, a warning message appears.
- Characters that are valid for naming files, folders, or shortcuts include any combination of letters (A-Z) and numbers (0-9), plus the following special characters.

^	Accent circumflex (caret)	$	Dollar symbol	(	Parenthesis opening
&	Ampersand	€	Euro symbol	)	Parenthesis closing
'	Apostrophe (single quotation mark)	=	Equal sign	.	Period
@	At symbol	,	Comma	+	Plus
{	Brace left	!	Exclamation point	~	Tilde
}	Brace right	-	Hyphen	_	Underscore
[	Bracket opening	#	Number sign		
]	Bracket closing	%	Percent		

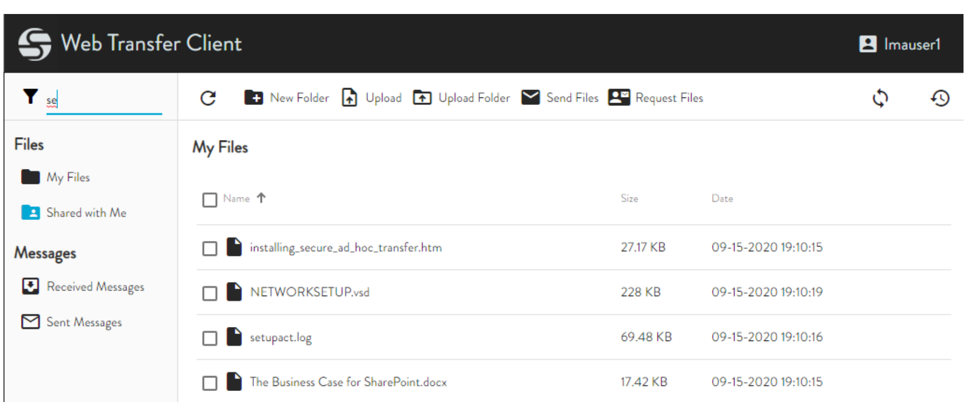
For more information regarding file-naming conventions, refer to the *Microsoft Windows Developer Network* article *Naming a File and the Microsoft TechNet* article How NTFS Works.

Filtering and Sorting the File List

You can filter the display of the files to display only the files that you want by name or file size. Additionally, you can sort the **File Name**, **Size**, and **Date** columns by clicking the arrows in the header. Note that if you filter for the letter *b*, you will see ALL of the files since every file has MB, KB, or GB in the **Size** column.

To filter or sort the file listing

1. Click in the **Filter** box in the upper left, then start typing the name of the file you are looking for.



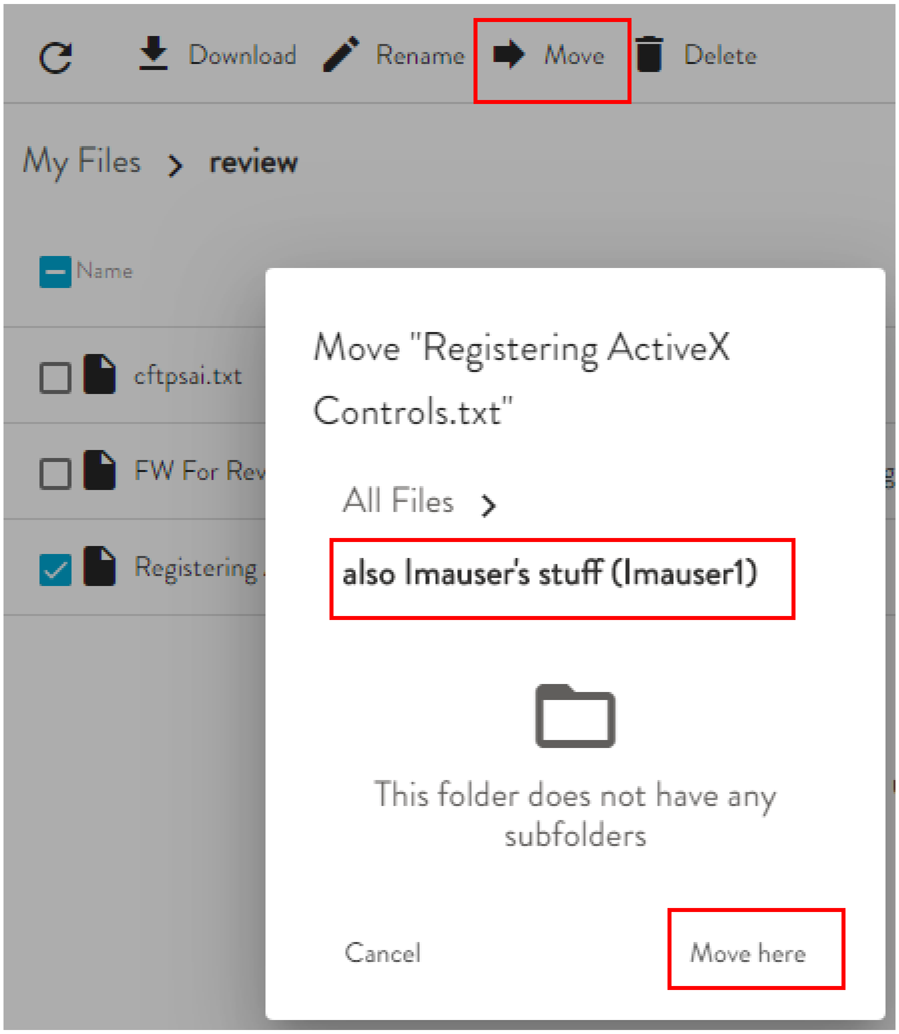
2. After two characters are typed, the file listing will update to display only files that contain the letters you've typed. Continue typing to narrow the listing. You can also filter by file size.
3. To refresh the file listing, click the **Redo** icon .
4. **To sort the list alphabetically,** click **Name** at the top of the list.
5. **To sort the list by size or date**, click **Size** or **Date** at the top of the list.

Moving Files between Folders

After you have created subfolders in your home folder, you can move files between those folders. Users with whom a Workspace is shared who have permission to move files and folders out of the Workspace can move files between Workspaces. For example, Imauser1 shares a Workspace with Imauser2. Imauser2 can move files from their file list to the shared Workspace folder (indicated by the Shared icon and the username appended to the folder name).

To move one or more files to another folder

1. Select the check boxes of one or more files that you want to move, then click the **Move** icon. The **Move** dialog box appears.
    - The **Move** icon is visible even if you don't have permission to move files.



2. Click the folder to which you want to move the file(s), then click **Move Here**.
   - When **moving large files**, if a message appears saying that it failed to move the file (s), wait a minute to see if the file(s) appear in the folder.
   - When **moving folders** from one virtual directory to another, the "move folder" operation temporarily disables timeout checks (similarly to some other potentially time-consuming operations like CRC calculation or ZIP download). This is done to prevent EFT from closing the connection while the client waits for the server to complete the move. There is no progress bar; at times you will see the folder/files duplicated across the folders until the transfer is complete. (You will need to refresh the browser. Some browsers require that you clear browsing history completely before displaying an updated page.)

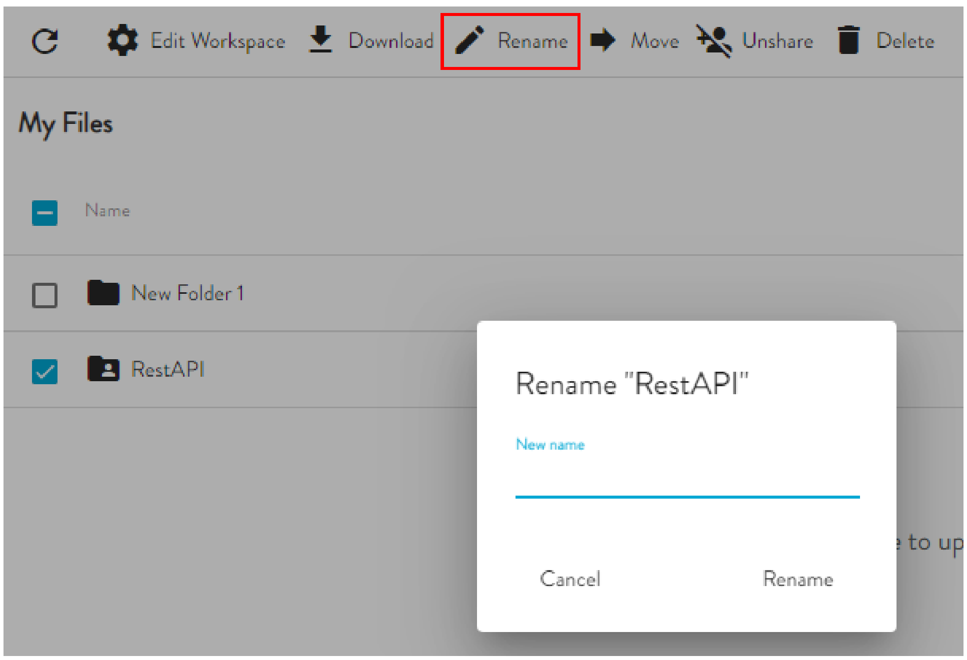
Renaming a File or a Folder

You can rename folders and files in your home folder and in subfolders. The WTC follows Windows file-naming conventions. That is, the following characters are invalid for file naming:

< > : " / \ | ? * %

To rename a file or folder

1. Select the check box for the file or folder that you want to rename.
2. On the toolbar, click the **Rename** icon.



3. The **Rename** dialog box appears. Provide a new name, then click **Rename**.

Searching for Files

If you have a large number of files and subfolders, you can find file more quickly by using filters to search by name, size, or date, or typing text in the **Filter** box to find the file.

The **Filter** box merely matches the text string that you type. For example, it doesn't know the difference between a PDF file and a PNG file; however, if you type png, the search results will show all files with png in the file name, including the extension). It is not case sensitive.

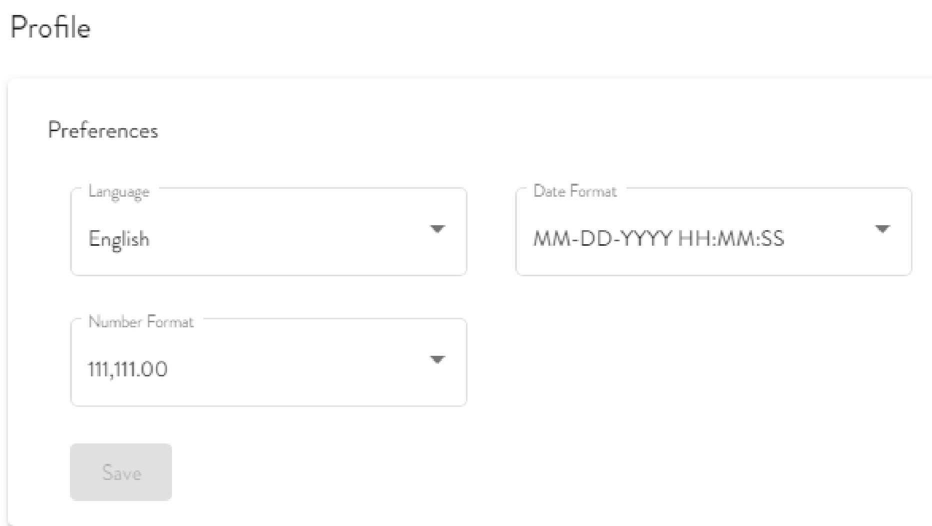
Certain wildcards will return matching results. For example, **w*n** displays results that have a **w**, one or more other characters, and then an **n**, such as **W**EB_VP**N**_Instructions.docx and **W**i**n**dowsClustering.pdf. Wildcards are useful, for example, for finding files when you aren't sure how they were named.

To search for files using a filter

1. In the Filter box, type your search term and then press ENTER. As you type, the WTC will find matches for what you have typed.
2. Click the found item to navigate to it.
3. Click the icon on the toolbar for what you want to do with the file (download, rename, delete, move, etc.).

Language Settings

- In your Workspaces profile you can specify the language that you want to use for the main portal. Click your username in the upper right to open your Profile, then under **Preferences**, chose your language and click **Save**.



- The Workspaces registration page will attempt to detect the user's language stored in the browser's settings, if a supported language is detected. If the language is not detected, the page will default to English. This is the setting that is used in the Send, Reply, and Drop-Off portal.
  - **In Firefox**, the language setting will not keep the setting after logging out and then back into the browser.
- Or, on the **Registration** page, you can click the English drop-down list to choose other supported languages.

Web Transfer Client Pagination

The Web Transfer Client (WTC) directory listings can appear on multiple pages. The WTC will pull 500 records (folders/files) on initial load by default. WTC file listings have buttons for next page, previous page, and so on.

These pagination controls are only displayed when there is enough data to be paginated. If the page size is 500 and there are 1000 records, the controls will be displayed. However, if the page size is 500 and there are only 200 records, the controls will not be shown.

- When clicking "select all" in the table, the WTC will only select items that have been loaded. Changing pages will clear your selection.
- Filtering will only affect the items that are on the currently loaded page. This means that, if you have 500 items loaded out of 5,000 total, the filter operation will only be looking at the 500 items that are loaded at any given time.

The **fileListingDisplayLimit** advanced property in the **admin-configuration.json** file can be used to change the page display limit. If administrators want to turn off this functionality (that is, never use pagination for file listings), they should set this value to 0, which means there is no limit.

When retrieving listings from EFT, folders and workspaces are always given higher priority than files.

Logging Out

The server ends the session immediately when the browser is closed or after a period of inactivity. When the session is ended, the directory listing and any other personal information is cleared, and the login page is displayed.

To log out

- Click the username in the upper right corner, then click **Log out**. The WTC closes and the **Log In** page reappears.

Automatic Log Out

After a period of inactivity (approximately 10 minutes), a message appears warning that you are about to be logged out. You can click **Continue** to stay connected. The message will reappear for each period of inactivity.