

Version 7 Changes Guide

This document provides information on the changes that have been incorporated into the latest version of your web-based file transfer application (Version 7.0, Released June 2017).

Numbers in orange circles correspond to the user interface screens shown in the document.

Many Great New Features

This update contains a number of new features and upgrades, greatly enhancing the security and usability of your FileTransfers.net site:

- Rewritten from the ground up for reliability, increased speed and ease-of-use.
- Make additional user purchases for Office subscribers.
- Upgraded security features , including password formatting, password expiration, remember old passwords and restrict by IP address.*
- “Require login to access these files” can now be set as the default.*
- Send files to non-users securely with password.*
- Track downloads by non-users.
- “My Activity” and “My Notifications” tabs.
- Improved Batch User Import*
- User templates
- And much more...

*FileGenius Business and Corporate subscriptions only.

Version 7 Changes Guide

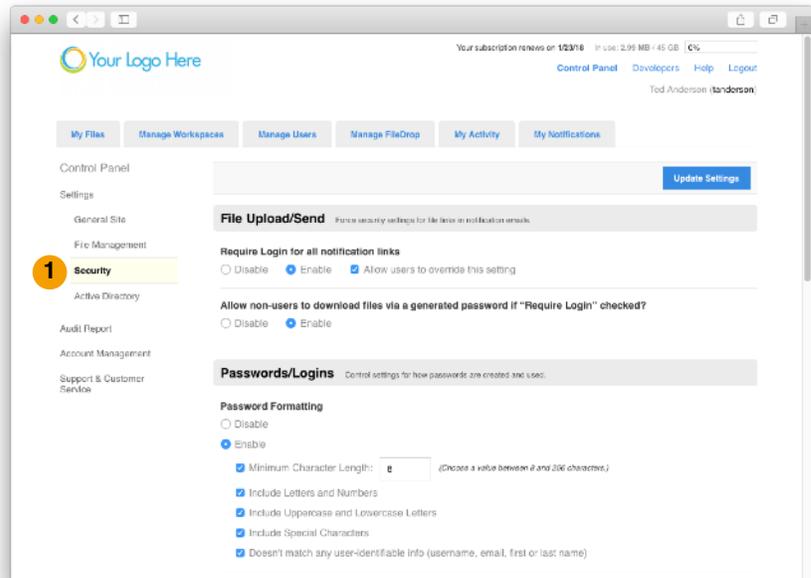
Security Updates

Admins Only • Business/Corporate Subscriptions Only

This version contains numerous updates and additions to the security features of your FileTransfers.net site. To access these new features, go to Control Panel —> Settings —> Security. **1**

Require Login for all notification links

For Upload/Send and Send, you now have the ability to have the “Require login to access these files” feature selected by default, eliminating the need to check it each time a file is to be sent securely. If you wish to give your users the option to send a file without requiring a login, make sure “Allow users to override this setting” is checked.



Allow non-users to download files via a generated password if “Require Login” checked?

You can now send files to non-users securely via password. Just enable this feature and Upload/Send and Send windows will include the ability to generate a password or accept one of your own choosing when sending to non-users (see [page 4](#) of this document).

Password Formatting

Admins can now force users to create passwords according to a number of different criteria:

- Minimum character length
- Include letters and numbers
- Include special characters
- Doesn't match any user-identifiable info (username, email, first or last name)

Select the Enable radio button and check the box next to any of the criteria you wish your users to adhere to when creating their passwords at first login or after a password reset. Temporary passwords generated by the system when users are created or passwords reset will also honor these settings. Be sure to check “Update Settings” at the top or bottom of the page when finished.

IMPORTANT: When settings are changed that require stronger password (e.g. character length is increased), all users will have their password reset. They will be sent a new temporary password and required to generate a new password that adheres to the new security settings. If settings are changed to require a less-secure password, users will not be required to reset their password and can continue to use their existing password.

Version 7 Changes Guide

Password Expiration

Enabling this feature will force the user to reset their password after the selected number of days. Once a user's password expires, the system will email the user a new temporary password which they will need to log in with to create their new password. If the "Remember Old Passwords" option is selected (see below), the user must choose a new password that doesn't match any old ones extending back the selected number.

New User / Reset Password Temporary Password Expiration

These features will set the amount of time a temporary password assigned to a newly created user or password reset is valid before the user needs to issue a Forgot Password request or an Admin/Sub-admin resets their password from the Manage Users tab.

Remember Old Password

When enabled, users will not be able to create a new password that matches any of the passwords they used the past number of times set in the drop-down menu.

NOTE: This feature may not work until the user resets their password several times. This is because the system will not begin remembering passwords until the feature is enabled, so their current password is the only one the system will know. Subsequent password changes will be remembered up to the set number in the drop-down menu.

Restrict by IP Address

By enabling this feature, site Admins can restrict site access to traffic coming from only IP addresses listed in the provided field. Address can be included individually (e.g. 8.8.8.8) or as a range (e.g. 8.8.8.1-8.8.8.256).

IMPORTANT: Please double-check with your IT personnel before enabling this feature. Admins and users may not be able to log into your site if there is any discrepancy regarding your own IP addresses.

NOTE: If Restrict by IP is enabled, the FileTransfers.net support staff may not be able to log into your site to provide customer support. You may need to temporarily disable this feature to allow for support access.

Version 7 Changes Guide

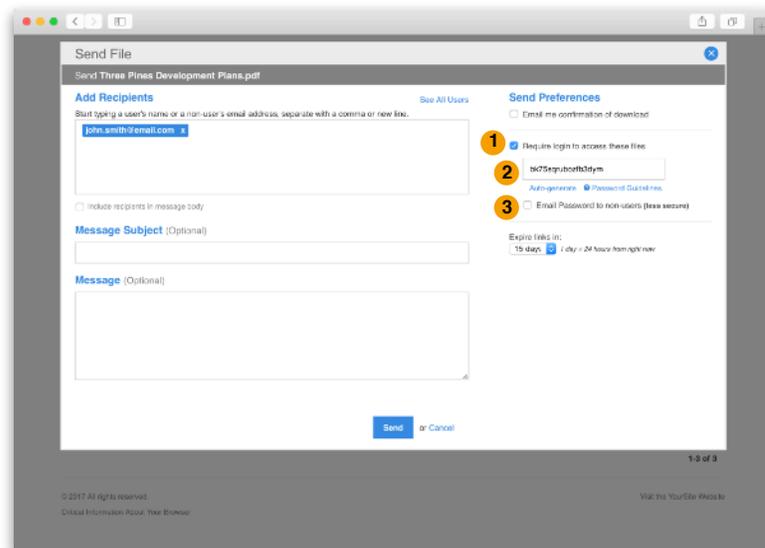
Send Files to Non-users with Password

Admins and Users • Business/Corporate Subscriptions Only

Admins and Users who have the "Send Files to Non-users" permission can now securely send files to non-users by requiring a password to download the file(s).

To enable this feature, an Admin must first go to Control Panel —> Settings —> Security, click the "Enable" radio button under "Allow non-users to download files via a generated password if "Require Login" checked?", then click the Update Settings button.

Now, when doing an Upload/Send or Send, after entering a non-user email address in the "Add Recipients" field and clicking "Require login to access these files", **1** you are presented with a "Set password (for non-users only)" field. **2** Here you can enter your own password or click the "Auto-generate" link to have the system generate a random password for you and enter it into the field. **NOTE:** The password entered must conform to any security settings defined on the Control Panel —> Settings —> Security page (such as password length, special characters, etc.). You may click the "Password Guidelines" link to see what criteria the password must conform to.



IMPORTANT: Remember, write down or copy/paste the password so you can provide it to the recipient! Without the password the recipient will not be able to download and you will be required to resend the file(s). In case you forget to copy the password prior to hitting Send, you will also be presented with a "Remember Your Password" screen that displays your password one last time to ensure you have it to pass along to the recipient.

You also have the ability to send the password along with the file link by clicking the "Email Password to non-users" checkbox. **3** **NOTE:** This is not as secure as providing the password to the recipient by other means, such as phone call, text message or choosing a pre-defined password known by both parties.

Version 7 Changes Guide

User Templates

Admins Only • All Subscriptions

Admins now have the ability to create User Templates to make it faster and easier to create new users. User Templates can be pre-populated with information that is often repeated when setting up users, such as specific permission sets or consistent company info and workspace assignments. These templates can be used when creating new individual users as well as batch user imports.

To create a new User Template, go to the Manage Users tab, click Add User, click User Templates in the upper-right and select "Create a New Template". This will provide a shadowbox window allowing you to define the criteria that will be automatically populated when creating a new user and selecting this user template. Once you have given the template a name and assigned the criteria, be sure to click "Add User Template".

When creating a new user (or doing a batch user import), you can now click User Templates in the upper-right and select the template you just created. Any information entered in the template will pre-populate the corresponding fields in the Add User screen. You can then finish filling out any required information (like name and complete email address) and make any changes prior to clicking Add User.

The following screen shot shows an example of how a company-specific user template might be filled out. Note that templates that aren't company-specific likely wouldn't contain information in the Email Suffix, Organization or Phone Number fields, nor have any workspaces selected as these would change on a user-by-user basis.

The screenshot shows the 'Add User Template' dialog box with the following details:

- Name:** ABC Company Users (with a note: "Up to 64 characters, letters, numbers, hyphens and spaces only")
- Email Suffix:** @ abccompany.com
- Organization:** ABC Company
- Phone Number:** 2025551223
- Permissions and Notifications:**
 - Admin
 - Batch Upload Files
 - Batch Download Files
 - Batch Delete Files
 - Batch Move/Copy Files
 - Send Files to Non-Users
 - Rename Files
 - Allow this user to reset their password?
 - Upload Notifications
 - Download Notifications
 - Upload Files
 - Download Files
 - Delete Files
 - Move/Copy Files
 - Send Files
 - Create Folders
- Workspaces:**
 - Johnson Printing
 - Photography
 - Projects-Archive
 - Projects-Hold
 - Taylor and Sons
 - Wilson and Sons
 - Select All
 - Add to all future workspaces
 - Create a workspace based on the user's name (in <Last Name>_<First Name> format)

Buttons at the bottom: **Add User Template** or **Cancel**

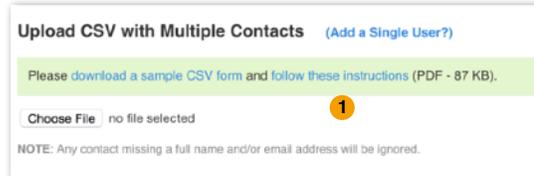
Version 7 Changes Guide

Batch User Import Changes

Admins Only • Business/Corporate Subscriptions Only

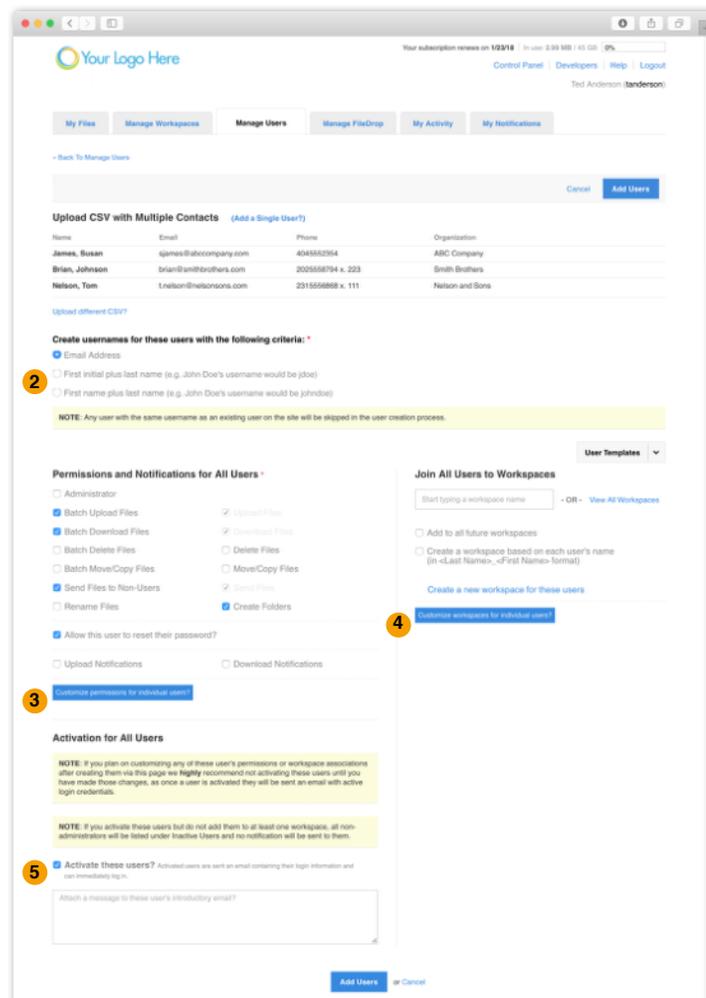
The Batch User Import feature has been reworked to be easier to use. The CSV template used for importing has been greatly simplified, with permissions now being set within the web interface. Workspaces can also be assigned at time of import as well as being able to use User Templates (see previous page). Full instructions on how to use the Batch User Import are provided on that page within your site. This Changes Guide will explain what has changed from the previous version.

To use the Batch User Import, go to the Manage Users tab, click Add User, and then click the "Add Multiple Users?" link next to the User Info heading. **1** On the next screen, in the green bar, click the "follow these instructions" link to download the full instructions on how to use the Batch User Import.



The following changes have been made to the Batch User Import:

- The CSV import file now only contains five fields: First Name, Last Name, Email, Company, Phone, and Phone Extension (with only First Name, Last Name, Email, and Company required).
- After importing the list of names, the Admin will define how the username will be generated for each user. **2**
- Permissions and notifications are now set in the web interface (previously in the CSV file). These can be applied to all users or specific permissions/notifications can be applied to any individual user. **3**
- As before, all users being imported can be assigned to one or more workspaces or have an individual workspace created based on their name (in <Last Name>_<First Name> format). Now, users can be assigned to workspaces individually, prior to importing, rather than after editing individually, after-the-fact. **4**
- Since individual customization is now available for all users prior to import, the "Activate these users?" option is checked by default, though it can still be unchecked if desired for activation later. **5**



Version 7 Changes Guide

My Activity

Admins and Users • Business/Corporate Subscriptions Only

New to this version are the “My Activity” and “My Notifications” tabs. These tabs provide a way to quickly see what your recent activity such as latest uploads and files you’ve sent, and see what your current notification settings are for each workspace you belong to. Admins may also change their notification settings on the “My Notifications” tab.

My Activity

Click the “My Activity” tab at the top of the page and you can see up to seven of your most recent activities in four different categories: My Latest Uploads, My Latest Downloads, Latest Files Sent to Me, and Latest Files I’ve Sent (see screen shot below). For each file listed in any category, a Download link is provided as well as a View File in Location for easily jumping right to where the file lives on the site.

The screenshot shows a web browser window displaying the 'My Activity' page. At the top, there is a navigation bar with tabs: 'My Files', 'Manage Workspaces', 'Manage Users', 'Manage FileDrop', 'My Activity' (selected), and 'My Notifications'. The page is divided into four main sections, each with a header and a list of recent activities. Each activity entry includes a timestamp, a file name, the workspace it belongs to, and two links: 'Download File' and 'View File in Location'.

My Latest Uploads

- 03/22/17 at 01:40 pm EDT
Northside Station Rendering.jpg in Job 4086 workspace
[Download File](#) [View File in Location](#)
- 03/22/17 at 01:40 pm EDT
Northside Station Project Specs.xls in Job 4086 workspace
[Download File](#) [View File in Location](#)
- 03/22/17 at 01:40 pm EDT
Northside Station Floor Plans-Version 1.... in Job 4086 workspace
[Download File](#) [View File in Location](#)

My Latest Downloads

- 03/22/17 at 01:39 pm EDT
Northern Elevation.dwg in Wilson and Sons workspace
[Download File](#) [View File in Location](#)
- 03/22/17 at 01:39 pm EDT
Landscape Details.jpg in Wilson and Sons workspace
[Download File](#) [View File in Location](#)
- 03/22/17 at 01:39 pm EDT
Staff Directory.pdf in Human Resources workspace
[Download File](#) [View File in Location](#)

Latest Files Sent to Me

- 03/22/17 at 01:46 pm EDT
Electrical Punch List.xls in Wilson and Sons workspace
[Download File](#) [View File in Location](#)

Latest Files I've Sent

- 01/27/17 at 11:56 am EST
Three Pines Development Plans.pdf in Johnson Architects workspace
[Download File](#) [View File in Location](#)
- 01/27/17 at 11:56 am EST
Three Pines Rendering 1.jpg in Johnson Architects workspace
[Download File](#) [View File in Location](#)
- 01/27/17 at 11:56 am EST
Three Pines Rendering 2.jpg in Johnson Architects workspace
[Download File](#) [View File in Location](#)

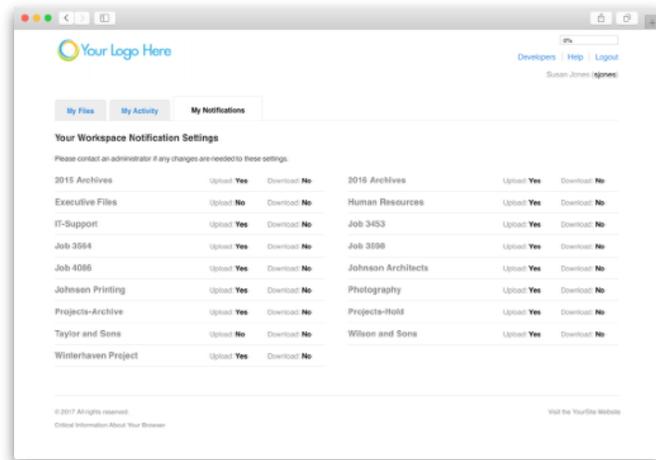
Version 7 Changes Guide

My Notification Tabs

Admins and Users • All Subscriptions

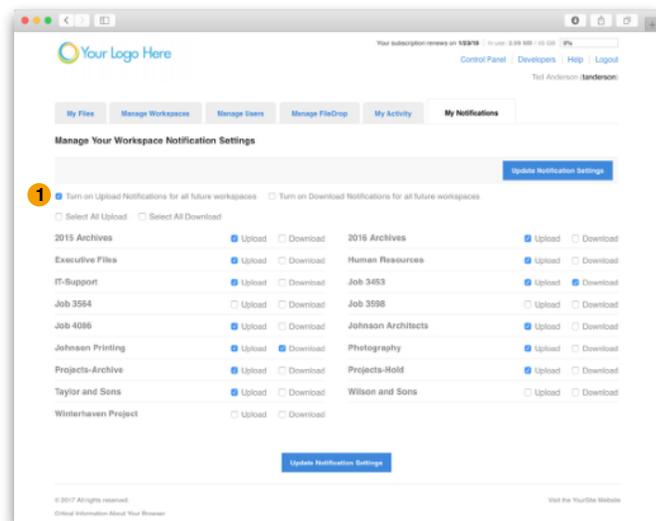
My Notifications – Users

Clicking the “My Notifications” tab will display all of the workspaces a User belongs to and shows how the notifications are set for each workspace. Note that users cannot modify their own notifications, so if any changes are desired they must contact a site administrator.



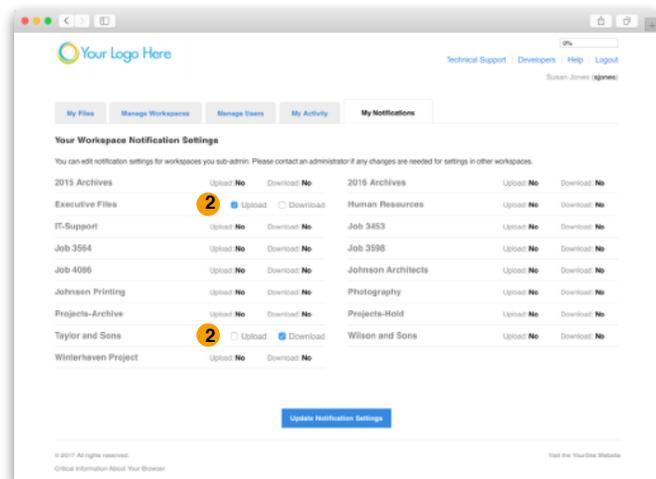
My Notifications – Admins

The My Notifications tab will display all workspaces for the site (since Admins belong to all workspaces). To change notifications check/uncheck as needed and click “Update Notifications Settings”. You can also choose to have Upload and/or Download Notifications turned on for all future workspaces. **1**



My Notifications – Sub-admins

In addition to seeing their notification settings, Sub-admins can change the settings for the workspaces they are a Sub-admin of. **2** Be sure to click “Update Notification Settings” after making any changes.



Version 7 Changes Guide

Manage FileDrop Tab

Admins Only • All Subscriptions

It is easier than ever to manage the FileDrop settings, now accessible from its own tab at the top of the page. Adding users to the FileDrop workspace as well as the Recipient List has also been streamlined and is easier to user.

Whether you want a user to be able to access the FileDrop workspace and/or be added to the Recipient List (so people uploading can select their name to be notified), the first step is to add them to the FileDrop Users list. Begin typing their name in the "Start typing..." field or click the "View All Users/Groups" list and select the desired users. Once added to the list, just define who should have workspace access or appear in the Recipient List by clicking the toggle switch on/off. Green **1** indicates they are added, grey they are not. Once you have the settings configured, be sure to click "Update FileDrop Settings".

In the example below, Tom Nelson will have access to the FileDrop workspace but will not appear in the Recipient List. Susan Jones will have access and appear in the list. Brian Johnson will appear in the Recipient list but will not have access to the workspace – he can only download files via the link in the notification email. Admins (such as Ted Anderson below) always have access to all workspaces so that is why there is no option to give him workspace access.

You can also override permissions and notification settings for the FileDrop workspace (see following page).

The screenshot shows the 'Manage FileDrop' tab in a web application. The interface includes a navigation bar with tabs for 'My Files', 'Manage Workspaces', 'Manage Users', 'Manage FileDrop', 'My Activity', and 'My Notifications'. A 'Update FileDrop Settings' button is visible. The main content area is divided into two columns.

Left Column: Settings

- Enable the FileDrop:** Allow non-users to upload files to your site via the home page. Radio buttons for 'Disable' and 'Enable' (selected).
- Require Login for Notification File Links:** Require login to for any notification download links when a non-user uploads a file. Radio buttons for 'Disable' (selected) and 'Enable'.
- Add FileDrop Instructions:** Give your users instructions on how to best use the FileDrop. A text area with the placeholder 'Add your custom FileDrop instructions here.'
- Override Permissions for FileDrop workspace?:**
 - Checkbox: 'Override permissions for all workspace users while in the FileDrop workspace?' (unchecked). Note: '(If a user has custom permissions set for the FileDrop workspace those permission settings will override this.)'
 - Checkbox: 'Batch Upload Files' (unchecked).
 - Checkbox: 'Upload Files' (unchecked).

Right Column: FileDrop Users

Start typing a user or group name - OR - View All Users/Groups

	Batch Actions	Workspace Access	Add to Recipient List
<input type="checkbox"/> Nelson, Tom	Make Sub-Admin Add Custom Settings Remove	<input checked="" type="checkbox"/> 1	<input type="checkbox"/>
<input type="checkbox"/> Jones, Susan	Make Sub-Admin Add Custom Settings Remove	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Johnson, Brian	Make Sub-Admin Add Custom Settings Remove	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Anderson, Ted (ADMIN)	-	-	<input type="checkbox"/>

Version 7 Changes Guide

Add/Edit Workspace Screen Changes

Admins Only • All Subscriptions

Several changes have been made to the layout and functionality when creating or editing workspaces.

Root Access for Non-Admins 1

Admins now have the ability to restrict users from the root (top level) of the workspace. This is beneficial if folders within the workspace are restricted and there's concern a user may upload sensitive information to the root of the workspace where anyone (even restricted users) could have access. When the option is unchecked and a user enters the workspace they will receive a message that states, "You do not have permission to access this area of the workspace. Choose a folder to continue." Upon entering a folder the user will be able to perform the actions they have permission for normally.

Override Permissions for this Workspace 2

Admins can now set permissions for a workspace that will override the global permissions given to a user. This allows control over the workspace for all users that belong, regardless of their global settings. Check "Override permissions for all workspace users..." and set the permissions that should be available. The next time a user logs in and visits that workspace, the permissions set here will override their global permissions. **NOTE:** If a user has custom permissions set for this workspace, those will override this setting.

Override Notifications for this Workspace 3

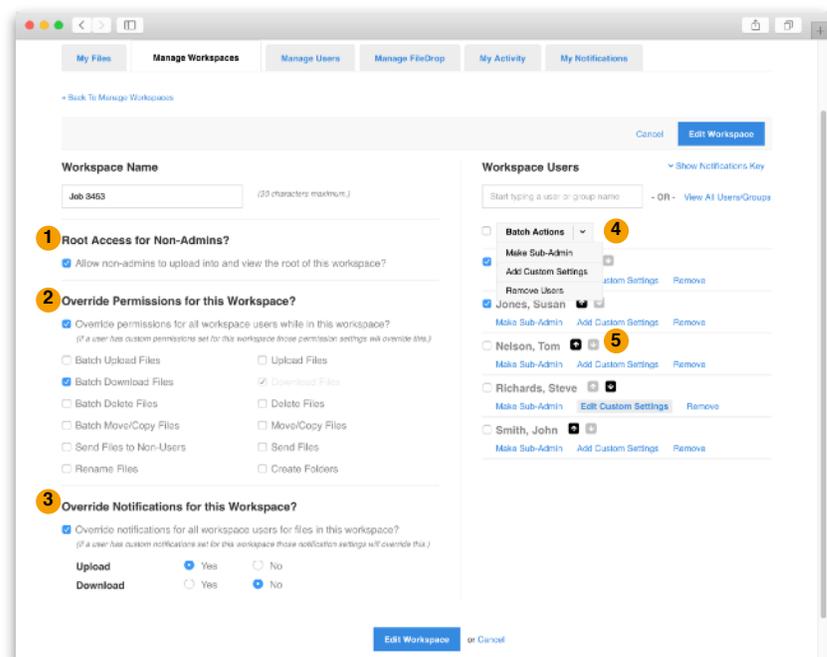
Similar to above, notifications can be set for the workspace which will override any user's global setting. Check the "Override Notifications..." box and set how the upload and download notifications. Again, any custom notification setting a user has for this workspace will override this setting.

Batch Action Changes 4

You can now batch edit users from within the Edit Workspace screen. Select the users you want to edit by checking the boxes to the left of their names, click Batch Actions at the top of the user list, and select the batch action you wish to perform: Make Sub-Admin, Add Custom Settings, or Remove Users. These actions can also be performed on individual users by clicking the link below the user's name.

Notifications at a Glance 5

You can now easily see how each user's notifications are set for the workspace you're editing. The up/down arrows next to each name indicate if notifications are turned on (black) or off (grey) for that user in this workspace. Hovering over the icons will display where the permission affecting the notification is set.



Version 7 Changes Guide

Add/Edit User Screen Changes

Admins Only • All Subscriptions

Similar to the Add/Edit Workspace Screen, a number of changes have been made to the layout and functionality when creating or editing users.

Batch Actions Changes 1

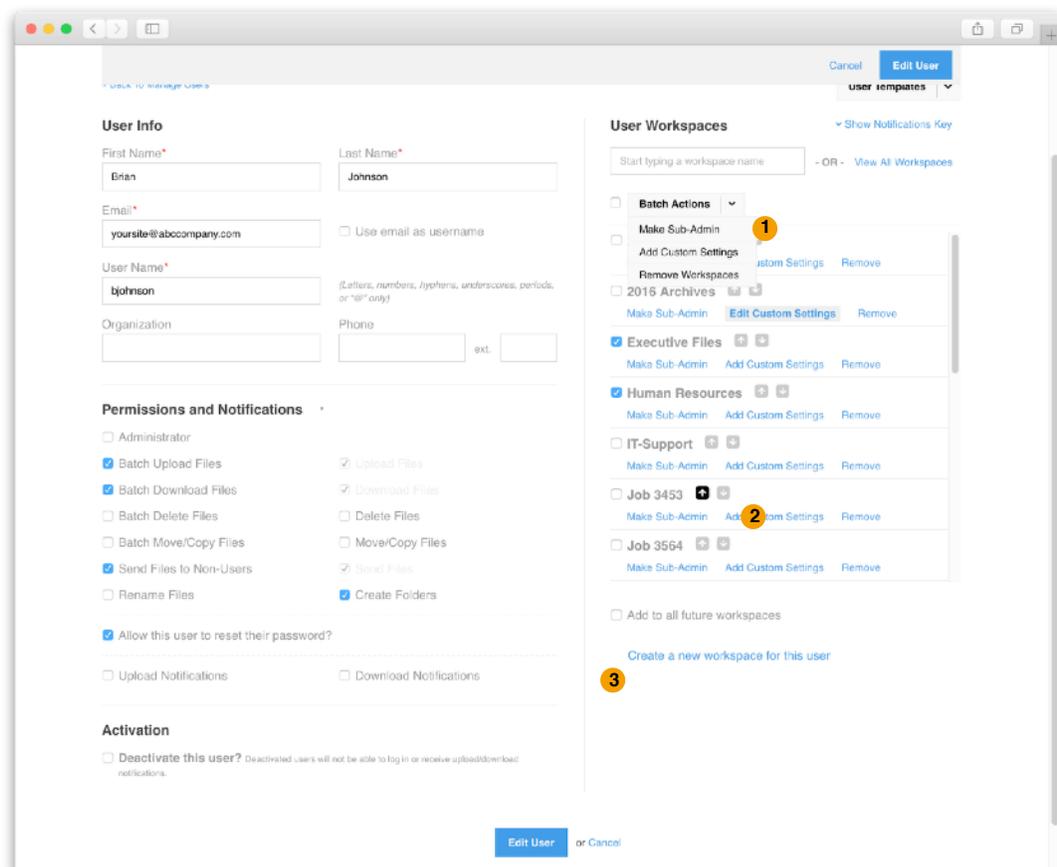
You can now batch edit workspaces from within the Edit User screen. Select the workspaces you want to edit by checking the boxes to the left of their names, click Batch Actions at the top of the user list, and select the batch action you wish to perform: Make Sub-Admin, Add Custom Settings, or Remove Workspaces. These actions can also be performed on individual users by clicking the link below the user's name.

Notifications at a Glance 2

You can now easily see how each workspaces's notifications are set for the user you're editing. The up/down arrows next to each name indicate if notifications are turned on (black) or off (grey) for that user in this workspace. Hovering over the icons will display where the permission affecting the notification is set.

Create New Workspace for User 3

You can now create a workspace right from the Add/Edit User window. Click "Create a new workspace for this user", enter the name of the workspace and click "Create Workspace". The workspace will automatically be created and the user added to it, appearing in the User Workspaces list. Don't forget to click "Edit User".



Version 7 Changes Guide

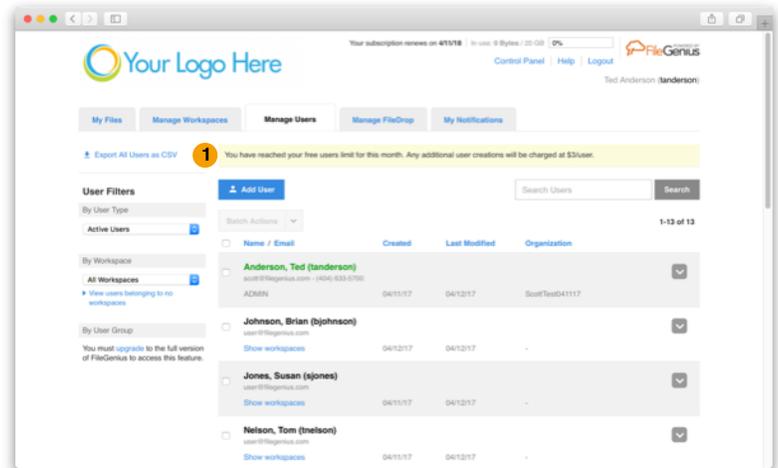
Additional User Purchases for Office Subscribers

Admins & Sub-admins Only • Office Subscription Only

It is now possible for Office Subscribers to purchase individual users beyond their 15/20 user subscription maximum at a cost of \$3.00/user per month. Doing so is as easy as adding a new user.

To create additional users, go to your Manage Users tab. If you have reached your allowed 15 or 20 users with your subscription plan, a message will be displayed at the top alerting you that additional user creations will be charged at \$3/user. **1**

To add more users, click the "Add User" button and create a user as you normally would. After the user has been created, the message at the top of the Manage Users tab will reflect how many users have been created or carried over from the previous month and what the total charges for the month will be. **2**



Additional Information

- The credit card on file will be charged on the first of each month.
- The charge is based on user creations beyond the 15 or 20 users included in your subscription. For instance, if you have an Office subscription with 15 users and you create two additional users, delete one and create one more (all within the same calendar month), you will be charged \$9 for three user creations that month.
- Any additional user creations that are still active at the beginning of the next calendar month will be charged \$3 for that month. For instance, if three users were created in the previous month and one was deleted before the first of the following month, you will be charged for the two remaining users on the first of the month.
- Deletion of users partway through a month will not receive a refund.



Version 7 Changes Guide

Miscellaneous Changes

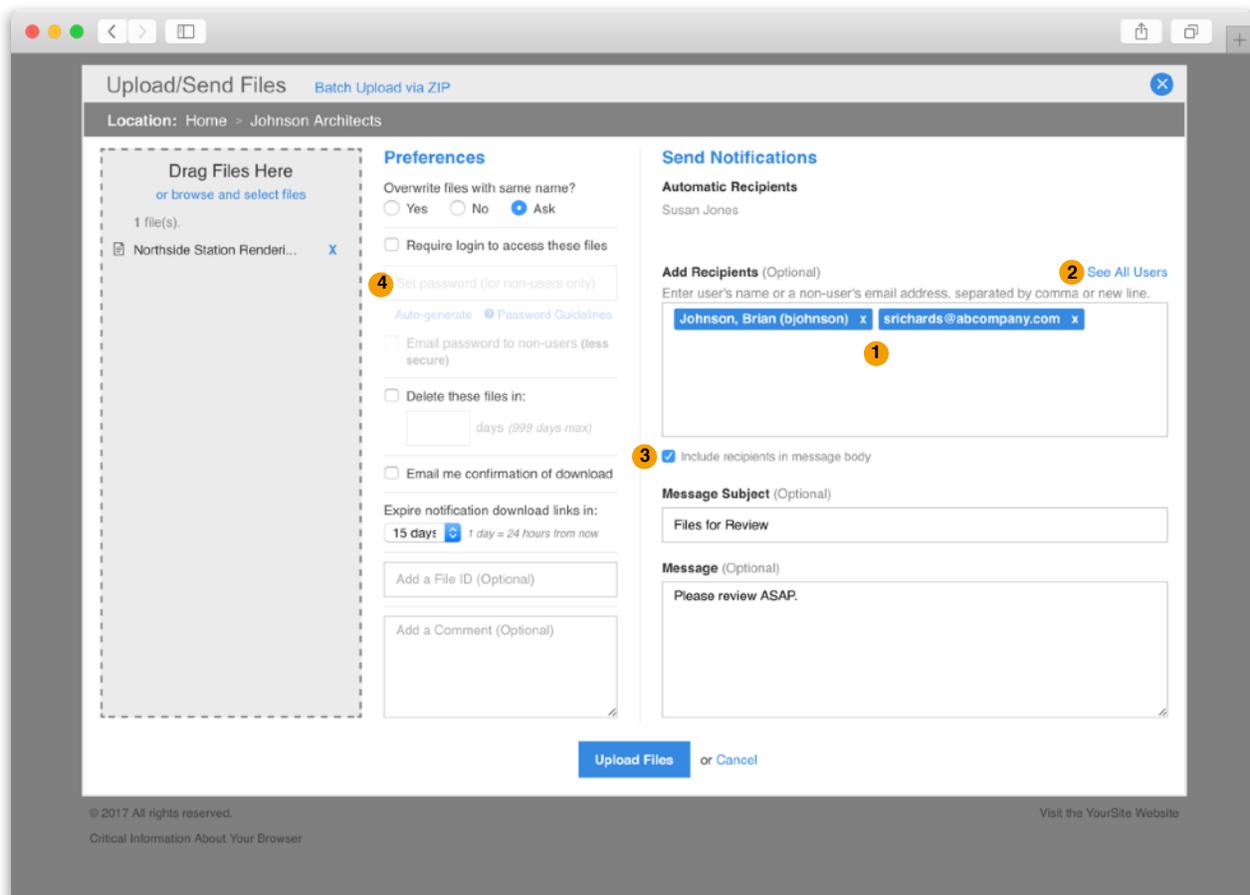
Upload/Send Files and Send Files Screen Changes

Admins and Users • All Subscriptions

The Upload/Send Files and Send Files screens have been redesigned to be faster and easier to use. Now, all elements appear on a single screen (versus two, previously). Also gone is the “Add Non-User E-mail Addresses” field. Now, both user names and non-user email addresses are entered into the same “Add Recipients” field. **1** After clicking in the field and starting to type, any names or email addresses that match what has been typed so far will appear, allowing you to click to autocomplete. Users can also be selected from a list by clicking on the “See All Users” link. **2** **NOTE:** If a user does not have the “Send Files to Non-Users” permission, email addresses entered in this field will automatically be removed.

Also gone is the “BCC recipients” option which is now replaced with “Include recipients in message body”. **3** When checked, this option will include the user’s name or non-user’s email address in the message of the notification email. This way, even if “Email me confirmation of download” is checked, users can still see who else is receiving the notification. Previously, if this option was checked, separate emails (with separate tracking codes) were sent to each recipient and people couldn’t see who else received the notification (even if “BCC recipients” wasn’t checked). Note that the system will remember the last setting for this option and make it the default for the next Upload/Send. For instance, if it were checked on the last send, it will be checked by default on the next one.

As mentioned previously, files sent to non-users can now be password-protected. **4** Please see [page 4](#) of this document for more information.



Version 7 Changes Guide

FileDrop Page Access

Admins, Users and Non-users • All Subscriptions

Previous versions required people to access the FileDrop by first going to the login page and clicking the "Upload a file without logging in" link which then opened a shadowbox window for input and file selection. The new version allow for linking directly to the FileDrop if desired. This will allow you to place a link somewhere (such as on your website) and send someone directly to the FileDrop page. This URL/address is: `http://[yoursiteaddress]/fileDrop`

Audit Report Changes

Admins Only • Business/Corporate Subscriptions Only

The Create Report page in the Audit Report has been simplified. Now, instead of all transaction types listed out in rows on the page, a single row is provided with a drop-down menu to select the action type you want. After selecting the action type choose a workspace and user (or "All" for either/both) and your date range per usual. After selecting an action type an "Add Another" link will appear that will allow you to select additional report types if desired. When finished, be sure to click "Create Report" button to download your report(s).

Track Downloads by Non-users

Also new in this version is the ability to track downloads by non-users. Previously, only Sends to non-users were able to be tracked. Now, the All Action Types and Downloads reports will include downloads by non-users, listing their email address in report. **NOTE:** Non-user downloads will only be tracked after the upgrade to the new version. Any downloads prior to the launch will still not be tracked.

Active Directory Improvements

Admins Only • Business/Corporate Subscriptions Only

The Active Directory setup now allows for the assignment of permissions and workspaces prior to the syncing of users, if desired. On the Active Directory page (Control Panel -> Settings -> Active Directory), under the "Active Directory Users Initial Settings and Workspaces" **1** section, select the permissions you wish users to have and workspaces you wish them to belong to upon initial sync. **NOTE:** This will affect all users upon their initial sync with the system. If you wish to assign users their permissions and/or workspaces manually, don't select any options. As before, any user's permissions and workspaces can be changed after the initial sync.