OPENTRUST

OpenTrust MFT 3.3.0 End User Guide

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Preface

The following sections contain preface information:

1. Related Documentation

2. Resources

Please use the information provided to contact the appropriate OpenTrust department or representative.

2.1. Contact Support

Support Web Site, including the Support Download Site	`https://support.opentrust.com/` (Login requires a username and password)
Email	`support@opentrust.com`

2.2. Contact Professional Services

Email	`support@opentrust.com`

2.3. Provide Documentation Feedback

As part of an ongoing process to create documentation that is easy to understand and use, as well as relevant to audience roles as administrator users, we welcome feedback about this guide. Please email any comments or suggestions to: `documentation_feedback@opentrust.com`

3. Document Conventions

OpenTrust documentation uses typographical conventions with specific meanings. These conventions are described in the following table.

Convention	How It Is Used
bold	Indicates the most important part of a step in step-based instructions. Example: Click the **OK** button.
italic	Indicates a reference to another document or guide. Example: See the *Release Notes*. Indicates the name of an access right. Example: The *unlock* right allows an administrator to help an end user unlock a smart card.
`monospaced font`	Indicates a file name, directory name or path, code examples and elements, application output, and user-entered text. Example: Save the file in the `/webserver` directory.
`italicized monospaced font`	Indicates an environment-specific or implementation-specific variable. Example: Save the file in the *`root_directory`*`/webserver` directory.
Important:	Contains important information that must be paid attention to. Failure to do so may have a negative impact on the application.
Note:	Contains valuable supplementary information.
Tip:	Contains helpful information that may be useful, for example, a shortcut or another way of performing a task.

1 Introduction

The Managed File Transfer application provides a secure platform in which centralized control of electronic exchanges ensures the traceability and confidentiality of all exchanged data. The Managed File Transfer end user application contains the following features:

- “Exchange Files” on page 9 - Registered users can exchange files with other registered users via simple messages. If authorized by an administrator, registered users can send guest users tokens in order to enable guest users to send files via simple messages. Registered users and guest users with tokens can also send project messages. Project messages enable several users to send and receive related information via group messages. Registered users and guest users can also search for archived or deleted messages by accessing the Search tab.
- “Manage Options” on page 13 - Users can save contacts to better manage the users that they frequently interact with. Users can also create contact groups in order to send messages to several contacts at once. Projects can be configured by any registered user that has been issued the right by an administrator. Projects allow files to be shared among several people in a simple manner.

For more detailed documentation related to the administration interface, please refer to the *OpenTrust MFT Server Configuration Guide*.

2 Exchange Files

The Managed File Transfer end user application allows users to send and receive files through messages, search for old messages, and send tokens to non-users that enable them to send messages within the Managed File Transfer application for a limited time. Users can:

- "Send a File" on page 9
- "Forward a Message" on page 10
- "Create an Upload Token" on page 10
- "Manage Sent Messages" on page 11
- "Search for a Message" on page 11

2.1. Send a File

Users can exchange messages that contain documents in two different ways. One user can send messages to other user(s) through a *simple message*, or registered users can be grouped into *projects* to create an efficient and convenient way to send messages within a specific group of users (a work group). Simple messages are single, one time messages that can be sent from one user to other user(s), similar to an email exchange. Simple messages can be either sent to registered users (possessing a Managed File Transfer account) or guest users (who do not possess an account). A user's ability to send a file in either a simple message or a project, can be configured by an administrator in the Managed File Transfer administration application. For more information on how to assign exchange rights, refer to the *Managed File Transfer Server Configuration Guide*

To send a file:

1. Log in to the Managed File Transfer end user application using credentials configured and provided by an administrator.
2. Navigate to the **Send** tab.
3. On the Simple Message page or the Project Message page, configure the following message options:
    a. **Recipients** - In the text-entry field, enter the email address or contact group name of the recipient of the simple message or, from the drop-down menu, select the project name of the recipient of the project message. As many recipients as needed may be added. If the recipient of the message is a Managed File Transfer user or a guest user that has been saved as a contact, auto-completion is enabled. The entered recipient will be emailed a link which can be used to access the message in the Managed File Transfer end user application. The list of allowed recipients (registered or guest) depends on the exchange rules configured by the administrator.

    b. **Subject** and **Comments** - Enter the subject and any comments for the message. The subject will be visible to the recipient of the message before the message is open. Providing detailed information in the subject and comments fields will make it easier for the recipient to identify the purpose of the attached file.

    c. **Files** - Click the Add a File icon and select the file to be attached to the message.

    d. **Lifetime** - Use the down arrow or the calendar icon to set the expiration date for the message. Once the message lifetime is expired, the message will be automatically deleted from the server; the message information remains available via the Search tab (the message recipients, download dates, etc.), but the message files can no longer be retrieved.

    e. **Encryption** - Select this option to encrypt the file(s) attached to the message. If selected, in the text-entry fields, enter and confirm a password that will enable the recipient to open the file(s). Confirm the password. Without the password, the recipient will not be able to open the message files. This feature may be mandatory, optional, or unavailable depending on the configuration selected by the administrator in the Managed File Transfer administration application. It is up to the message sender to transmit the password to the recipients in a way deemed secure (by phone, SMS, etc.); Managed File Transfer does not offer a feature to securely transmit the password. Only files less than 1 GB can be encrypted.

f. **PDF Signature** - Select this option to sign PDF documents sent within the message. This feature may be mandatory, optional, or unavailable depending on the configuration selected by the administrator in the Managed File Transfer administration application. The PDF signature is performed by the Managed File Transfer server; no signing certificate is required from end users.

g. **Pre-archiving** - Select this option to pre-archive the message and its attached file(s) upon expiration or deletion. This feature may be mandatory, optional, or unavailable depending on the configuration selected by the administrator in the Managed File Transfer administration application.

4. Click **Send**.

2.2. Forward a Message

In the Managed File Transfer end user application, sent or received messages may be forwarded to other users. The title and comments of a forwarded message may be updated by the sender, but message files cannot be changed. Encrypted messages can only be forwarded if the option is enabled by an administrator. Files in forwarded messages retain the encryption and signatures applied to the original files.

To forward a message:

1. **Log in** to the Managed File Transfer end user application using credentials configured and provided by an administrator.
2. On the Messages or Search tab, click on the **message** to be forwarded, and then click on the Forward button. The message is displayed with a list of files that were attached to the original message. File attachments included in the original message cannot be removed from the message being forwarded and new file attachments cannot be added to the message being forwarded.
3. Configure the following message options:

   a. **Recipients** - In the text-entry field, enter the email address or contact group name of the recipient of the simple message or, from the drop-down menu, select the project name of the recipient of the project message. As many recipients as needed may be added. If the recipient of the message is a Managed File Transfer user or a guest user that has been saved as a contact, auto-completion is enabled. The entered recipient will be emailed a link which can be used to access the file in the Managed File Transfer end user application.

   b. **Subject** and **Comments** - Enter the subject and any comments for the message. The subject will be visible to the recipient of the message before the message is open. Providing detailed information in the subject and comments fields will make it easier for the recipient to identify the purpose of the attached file.

   c. **Lifetime** - Use the down arrow or the calendar icon to set the expiration date for the message.

   d. **Pre-archiving** - Select this option to pre-archive the message and its attached file(s) upon expiration or deletion. This feature may be mandatory, optional, or unavailable depending on the configuration selected by the administrator in the Managed File Transfer administration application.
4. Click **Send**.

2.3. Create an Upload Token

Guest users can send messages to registered users only if an upload token is sent to them by a registered user with the right to send upload tokens. The sole implicit recipient of a message sent by a guest user is the upload token creator. Only an administrator can grant the right to send upload tokens to guest users. For more information on how to assign rights, refer to the *Managed File Transfer Server Configuration Guide*.

To create an upload token:

1. Log in to the Managed File Transfer end user application using credentials configured and provided by an administrator.
2. Navigate to the **Tokens** page.

3. On the Tokens page, choose to **Create a New Token** or to **Modify** or **Remove** an existing token.
4. If the choice is to create a new token or modify an existing token, on the token details page, configure the following token configuration options:

    a. **Email** - In the text-entry field, enter the email address of the recipient of the upload token. The recipient will be emailed a link which can be used to send messages in the Managed File Transfer end user application. The sole implicit recipient of those messages is the token creator.

    b. **Lifetime in Days** - Using the up and down arrows, configure the length of the lifetime of the token in days. Once the token lifetime has expired, the upload token will be invalid.

    c. **Comment** - In the text-entry field, enter any comments to better describe the purpose of the upload token to the recipient.

    d. Click **OK**.

2.4. Manage Sent Messages

After a file has been sent, the message sender can extend the message lifetime, add recipients to the message, or delete the message. A message deleted by its sender is no longer available to its recipients. A message recipient can also delete a message he received, but this will not affect other message recipients; the message is simply removed from the message list displayed to the recipient deleting it.

To edit a sent message:

1. Log in to the Managed File Transfer end user application using credentials configured and provided by an administrator.
2. Navigate to the **Messages** tab and select the message to be edited.
3. Using the corresponding icons, select one of the following options:
    - **Extend Message Lifetime** - When prompted, use the up and down arrows to configure the new message lifetime. At the end of the lifetime, the message will be automatically deleted.
    - **Add Recipients** - When prompted, in the text-entry field, enter the email address for each recipient to be added to the message. The message will be forwarded to the new recipient.
    - **Delete Message** - When prompted, confirm the choice to delete the message.

2.5. Search for a Message

Registered users can search for messages that are not displayed on the message tab even after the messages have expired or been deleted. It should be noted that the message files are not available anymore. A registered user can use this option to search for either sent or received messages.

To search for a message:

1. Log in to the Managed File Transfer end user application using credentials configured and provided by an administrator.
2. Navigate to the **Search** tab and configure the following options:

    a. **Search** - Select to search among all messages, only received messages, or only sent messages.

    b. **In** - Select to search within all messages, only simple messages, or only project messages.

    c. **Date Interval** - Click on icon. In the text-entry fields, enter the dates to search within, or, in the pop-up calendar icon, use the right and left arrows to reach the correct month, and click on the days to configure the date interval to search within.

    d. In the blank text entry field, enter any other information, such as the name of the recipient or message title, to narrow the search results.

    e. Click **Search**.

3 Manage Options

In addition to managing sent and received messages, users can also create and manage a few option settings to enhance the user experience of the Managed File Transfer application, such as:

- "Add/Configure a Contact" on page 13
- "Add/Configure a Contact Group" on page 13
- "Add/Configure a Project" on page 14

3.1. Add/Configure a Contact

In the Managed File Transfer end user application, contacts are automatically created when a registered user sends a message to another registered user or a guest user. A registered user can also manually add a contact in order to add the contact to the auto-completion list, or can modify the contact.

To configure a contact:

1. Log in to the Managed File Transfer end user application using credentials configured and provided by an administrator.
2. Navigate to the **Contacts** tab.
3. On the Contacts page, choose to **Create a New Contact** or to **Modify** or **Remove** an existing contact.
4. If the choice if to create a new contact or to modify an existing contact, on the contact details page, configure the following contact configuration options:
    a. **Email** - In the text-entry field, enter the email address of the contact. The email address will be the address used by the Managed File Transfer application to send messages to.
    b. **First Name** - In the text-entry field, enter the first name of the contact.
    c. **Last Name** - In the text-entry field, enter the last name of the contact.
    d. **Language** - From the drop-down menu, select the language that will be used when messages are sent to the contact.
    e. **Description** - In the text-entry field, enter a description for the contact.
    f. Click **OK**.

3.2. Add/Configure a Contact Group

Users can create contact groups in order to easily send messages to more than one user at a time.

To configure a contact group:

1. Log in to the Managed File Transfer end user application using credentials configured and provided by an administrator.
2. Navigate to the **Contacts** page.
3. On the Contacts page, choose to **Create a New Contact Group** or to **Modify** or **Remove** an existing contact group.
4. If the choice is to create a new contact group or to modify an existing contact group, on the contact group details page, configure the following contact group configuration options:

a. **Group Name** and **Description** - Enter a name and description for the contact group. The name will be visible in other parts of the end user interface for the administration application, for example, when entering a recipient for a message. Providing detailed information in the name and description fields will make it easier to select the correct contact group in other parts of the end user interface.

b. **Contacts** - Select Add Members and search in or select from the list of contacts to be added to the contact group.

c. Click **OK**.

3.3. Add/Configure a Project

Projects allow information to be shared among several people. Members are notified when other members send a file to the project. All project members can then download files sent to the project. The ability to create a project is only available if the right to create projects was granted by an administrator to the registered user. The ability to modify an existing project can be granted by the project owner to any member of the project. The owner of the project is visible on the project page, under the project list, as the first user in the list.

To configure a project:

1. Log in to the Managed File Transfer end user application using credentials configured and provided by an administrator.
2. Navigate to the **Projects** page.
3. On the Projects page, choose to **Create a New Project** or to **Modify** or **Remove** an existing project.
4. If the choice was to create a new project or to modify an existing project, on the create a new project page, configure the following contact group configuration options:

   a. **Title and Comments** - Enter a title and comments for the project. The title and comments will be visible in other parts of the end user interface for the administration application, for example, when choosing a project as the recipient for a message. Providing detailed information in the title and comments fields will make it easier to select the correct project in other parts of the end user interface.

   b. **Sending Policy** - From the drop-down menu, select a sending policy to apply to the project.

   c. **Project Members** - In the text-entry field, enter the name of users to be added to the project.

   d. **Project Managers** - In the text-entry field, enter the name of users to be added as project managers. The user creating the project is automatically selected as a project manager.

   e. Click **OK**.