# File Cabinet for Administrators

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# File Cabinet for Administrators

This section includes information about the tasks that are common to users with the Administrator role. For information about tasks that are common to all users, regardless of their roles, see the help topic File Cabinet Overview.

For information about how to make your files accessible on any URL listed on the file, see Making Web Site Hosting Files Always Available.

For information about the Hide Attachment Folders preference, see Hiding Attachment Folders.

For information about how to predefine dedicated folders where employee-specific expense report attachments are automatically saved, see Enabling the Use of Employee-Specific Expense Folders.

For information about how to upload a logo, see Uploading Your Logo.

For information about using the Expense Report Attachments Migration Tool that allows you to migrate existing expense attachments to the File Cabinet dedicated employee expense folders, see Expense Report Attachments Migration Tool.

## Making Web Site Hosting Files Always Available

You can use the **Available without Login** box on file records to restrict external access to individual files. However, files you want to publish on a company intranet or an ecommerce website must have the **Available without Login** box checked to be displayed correctly on your website.

Web Site Hosting Files Always Available is a general company preference in NetSuite. This preference is checked by default. It affects how files in the Web Site Hosting Files folder and files in the SuiteBundles folder are made available online. This global setting overrides the **Available Without Login** and the **Company-Wide Usage** boxes on individual file records. To clear the general preference, go to Setup > Company > General Preferences.

Files stored in Web Hosting Files folders using Add File or Advanced Add are automatically available without login. On Advanced Add, the **Make All Files Available Without Login** box is checked by default. When a file is added using Add File, the **Available Without Login** setting is applied automatically for these folders.

The **Available Without Login** setting makes web site assets accessible on your shopping domain. In this way, visitors to your ecommerce site can view images and web site content using their web browsers. The Available Without Login setting appears as a box on all file records in the File Cabinet.

By default, files uploaded using SuiteScript are available only with login, regardless of which folders the files are saved in. To make files uploaded using SuiteScript available without login, you must set the parameter on the upload script or check the **Available Without Login** box.

Files uploaded using Web Services files use the same available without login rules as files uploaded using SuiteScript. For more information, see SuiteScript File Object Members and SOAP Web Services File Record Field Definitions.

> **Note:** The **Company-Wide Usage** box on individual file records does not affect whether the file is accessible on your website or not. File availability on the website is controlled only by the Web Site Hosting Files Always Available preference and the Available Without Login setting.

SuiteScript (.ss files) and SuiteScript Server Pages (.ssp files) stored in the Web Site Hosting Files Folder function as executable files. Both general preferences and individual file settings are overridden by Audience settings on the Permission subtab on each file. Depending on the settings on the Permissions subtab, these files return either the expected script response value or a Permission Violation.

### Setting the General Preference

When the **Web Site Hosting Files Always Available box is checked**, your settings for the **Available without Login** box are ignored on individual file records. Files stored in the Web Site Hosting Files and SuiteBundles folders are accessible on all URLs listed on the file record. Anyone can access these files on a NetSuite shopping domain or a custom domain that you set up in NetSuite. Both JavaScript server-side and JavaScript client-side files are available to download.

### Clearing the General Preference

When the **Web Site Hosting Files Always Available box is cleared**, your settings for the **Available Without Login** box are recognized on individual files. You can clear the Available Without Login box on individual files stored in the Web Site Hosting Files and SuiteBundles folders to make them unavailable on a shopping domain. Files with the Available Without Login box cleared, return 404 Not Found errors when accessed using a shopping domain.

> **Warning:** If the Available Without Login box is cleared on image files published to your website, those images are not displayed, and the website may appear broken.

Additional information:

- File Cabinet Overview
- Setting General Account Preferences
- Setting Available Without Login
- Make Images Available Without Login

## Hiding Attachment Folders

Users with the Administrator role can set the Hide Attachment Folders preference at Setup > Company > General Preferences to prevent access to the following folders:

- Attachments Received
- Attachments Sent
- Mail Merge

When this preference is set, employees and partners still have access to files that are attached to customer and other record types even if the files reside in one of the folders listed earlier. However, they are unable to view or search for those files in the File Cabinet.

To ensure that only users with adequate permission can access confidential records and associated files in the File Cabinet, the attachments folder is hidden by default. The Hide Attachments Folder box on the General Preferences page defaults to checked for all new customers.

> **Note:** The **Hide Attachment Folders** preference overrides any restriction applied to a subfolder of the Attachments Received and the Attachments Sent folder.

## Enabling the Use of Employee-Specific Expense Folders

You can configure NetSuite to predefine dedicated folders where employee-specific expense report attachments are automatically saved. If you have the Administrator role, you can see the contents of these folders, but employees cannot locate or access these attachments from the File Cabinet. Employees must instead access their expense attachments from the expense report record.

Enabling Employee Specific Expense Folders

### To enable the use of employee-specific expense folders:

1. Go to Setup > Company > Enable Features.
2. Click the **Company** tab.
3. Under **Data Management**, check the **Enhanced File Security – Use Employee Specific Folders** box.
4. Click **Save**.

Use the Expense Report Attachments Migration Tool to migrate any existing expense attachments to the File Cabinet dedicated employee expense folder structure. The migration tool searches all expense reports for files that should be moved to the predefined user folders. For more information, see Expense Report Attachments Migration Tool.

# Uploading Your Logo

Uploading your logo to the File Cabinet enables you to print it on all forms except checks. You also can display your logo in your Customer, Partner or Vendor Center, and your website. Logo files must be in GIF or JPG format, and the file size should be less than 10 KB. To print your logo on standard forms, the logo must be no more than 200 pixels wide and 60 pixels high. Image resolution may change how your logo appears on a standard form. If your logo doesn't display correctly, change the image resolution.

For information about printing subsidiary logos, see the help topic Printing Subsidiary Logo on Advanced Templates.

## Uploading Your Logo

You can upload your company logo to the File Cabinet.

### To upload your logo:

1. Go to Documents > Files > Images.

   > **Note:** You can upload your logo to a different File Cabinet folder. However, you shouldn't use the Attachments Received and Attachments Sent folder.

2. Click **Add File**.
3. Select your logo image.
4. Click **Open**.

Next, set your logo to appear on forms, in centers, and in your website.

To complete this task, you need the Administrator role or a role with access to the Company Information page in NetSuite.

## Setting Your Logo to Appear on Forms and Centers Associated with your NetSuite Account

You can set your logo to appear on forms and centers associated with your NetSuite account.

### To set your logo to appear on forms and on centers associated with your NetSuite account:

1. Go to Setup > Company > General Preferences.
2. Select the folder where you uploaded your company logo in the **Company Logo Folder** field.
3. Click **Save**.
4. Go to Setup > Company > Company Information.
5. Select your logo in the **Company Logo (Forms)** field. The logo you select here displays on transaction forms.
6. Select your logo in the **Company Logo (Pages)** field. The logo you select here displays on Customer, Partner, and Vendor Centers associated with your NetSuite account.

   > **Important:** Ensure the **Available Without Login** box is checked on the logo image file record. If you uploaded your logo image file to a folder other than the default Images folder in the File Cabinet, this box is **not** automatically checked. To check the box, edit the logo image file record.

7. Click **Save**.

## Setting the Logo for your Site Builder Website

You can set the logo for your Site Builder website.

### To set the logo for your Site Builder website:

1. Go to Commerce > Websites > Website List.
2. Click **Edit** next to the website you want to modify.
3. Click the **Appearances** subtab.
4. Select your image under **Website Logo.**
5. Set alignment in the **Web Site Logo Alignment** field. Your logo appears at the top of your site. You can choose to align your logo left, right or center.
6. Click **Save**.

After you click Save on the Web Site Setup page, click Commerce > Websites > Preview Website to see the results.

## Setting the Logo for your SuiteCommerce (SC) or SuiteCommerce Advanced (SCA) Website

You can set the logo for your SC or SCA website.

### To set the logo for your SC or SCA website:

1. Go to Commerce > Websites > Configuration.
2. Select the site where you want to add your logo from the **Select Website** list.

3. Select the specific domain that you want to configure from the **Select Domain** list.
4. Click **Configure**.
5. Go to the **Layout** subtab.
6. On the **Header** subtab, type the URL of your logo in the **Logo URL** field.
7. Click **Save**.

## Setting the Logo to Display on NetSuite Pages

You can set your company logo to display internally on all pages of your NetSuite account next to the Oracle | NetSuite logo. For more information, see the help topic Configuring Company Information.

# Expense Report Attachments Migration Tool

Users with administrative permissions can optionally use the Expense Report Attachments Migration Tool to migrate existing expense attachments to the File Cabinet dedicated employee expense folders. The migration tool uses internal logic to search all expense reports for files that should be moved to the predefined user folders. You can automatically schedule the migration, or you can use the migration tool to schedule the migration later.

> **Note:** Before completing this migration, you should test the expense changes with your customizations in a sandbox account.

Enabling Employee Specific Expense Folders

For more information, see the following:

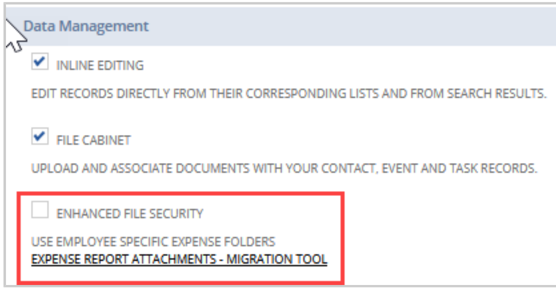
- Enabling and Configuring the Expense Report Attachments Migration Tool
- Managing the Expense Report Attachments Tool
- Expense Report Attachments Migration Tool Subtabs
- Scheduling an Expense Report Attachments Tool Migration
- Cancelling an Expense Report Attachments Tool Migration

## Enabling and Configuring the Expense Report Attachments Migration Tool

Use the Expense Reports Attachments - Migration Tool link on the Enable Features page to open the migration tool. You can use the migration tool to schedule or cancel a migration and view migration details. Before you can use this feature, you must enable it.

### To enable the migration tool feature:

1. Go to Setup > Setup Tasks > Company > Enable Features.
2. Click the **Company** tab.
3. Under **Data Management**, check the **Enhanced File Security** box.




4. On the message that appears, select an option:
   - To automatically schedule the migration, click **OK**. NetSuite schedules the migration for the next available time slot. You can review the migration status on the Migration Details subtab of the Expense Reports Attachments - Migration Tool.
   - To schedule the migration manually later using the migration tool, click **Cancel**.
5. Click **Save**.

You can now access the Expense Report Attachments Migration Tool using the Expense Report Attachments – Migration Tool link. If you try to access this page before saving the setting on the Enable Features page, you will get a message instructing you to enable the feature.

**Note:** If you disable the Enhanced Security feature, any scheduled migrations will be cancelled.

**Note:** You can enable and disable this feature as needed without affecting the existing file structure. Enabling and disabling the feature affects only the expense attachment creation process.

## Managing the Expense Report Attachments Tool

Open the Expense Report Attachments Migration Tool using the Expense Report Attachments – Migration Tool link on the Enable Features page. The Expense Report Attachments Migration tool opens in a new window and lists any files ready for migration. For more information, see Enabling and Configuring the Expense Report Attachments Migration Tool.

Use the migration tool to manage the migration of existing employee expense files to dedicated employee expense folders. You should only have to run this migration one time. However, the migration tool may require multiple runs if, for example, there are too many files to migrate in a single run, or if unexpected issues are encountered. For more information, see Scheduling an Expense Report Attachments Tool Migration. After the migration is completed, employee expense files will automatically be saved to the appropriate employee expense folders.

Use the migration tool to:

- View a list of files ready for migration
- Open and view attached files
- View applicable related expense reports
- Schedule a migration or cancel a scheduled migration
- View migration details, such as the progress or status of a migration job and history of previous migrations

For more information about using the migration tool, refer to the following topics:

- Expense Report Attachments Migration Tool Subtabs
- Scheduling an Expense Report Attachments Tool Migration
- Cancelling an Expense Report Attachments Tool Migration

# Expense Report Attachments Migration Tool Subtabs

For information about the subtabs available on the Expense Report Attachments Migration Tool, see the following sections:

- Expense Attachments Subtab
- Migration Details Subtab

## Expense Attachments Subtab

When there are files available for migration, the Expense Attachments subtab displays a list of files ready for migration. You can review this list prior to migration, open files to view them, and view any associated expense reports. This page also shows the name of the folder where the file is stored and the last date and time the file was modified. You cannot add or remove files. Files remain in the list until they are successfully migrated. If there are no files to migrate, this page shows a **No records to show** message.

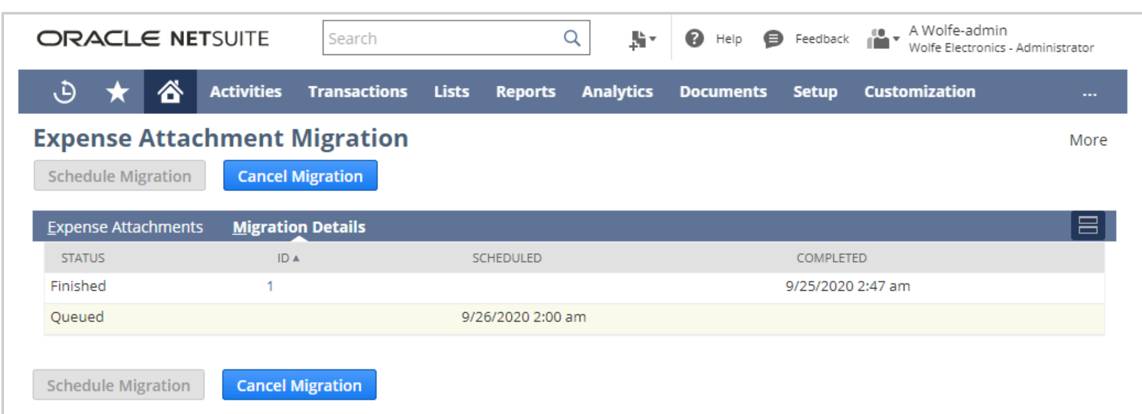
When files appear in this list, you can schedule them for migration. For more information, see Scheduling an Expense Report Attachments Tool Migration.

If necessary, you can cancel a scheduled migration. For more information, see Cancelling an Expense Report Attachments Tool Migration.

## Migration Details Subtab

The Migration Details subtab shows migration details, such as the progress or status of a migration job, history of previous migrations, and migrations in the queue for processing. These details include the migration status, date and time a migration is scheduled to run, and the completed date and time for finished migrations. The status can be queued, in-progress, finished, or failed.

The following screenshot shows an example of the Migration Details tab with queued and finished migration jobs:




For processed migrations, the link in the ID column opens the Expense Attachment Migration page, which includes Phases and Log subtabs. The Phases subtab shows the various migration phases, the phase status, start date and end date, and the percent complete. The Log subtab provides more detailed information about the expense migration state. These log details can include, for example, when a phase was started and finished, the number of files migrated, and the duration of the migration.

# Scheduling an Expense Report Attachments Tool Migration

> **Important:** After migration, there is no process to revert to the file structure before migration. You cannot remove new attachments from the User Documents structure. Restoration of the original file structure must be done manually by a user with the Administrator role. Additionally, files in the User Document structure keep the new access rights behavior, even if the Enhanced File Security feature is disabled.

To schedule an expense attachment migration, open the Expense Report Attachments Migration Tool. For more information, see Enabling and Configuring the Expense Report Attachments Migration Tool.

When the migration tool lists expense attachment files available for migration, you can schedule an expense report attachments migration. Migrations are scheduled to run during your maintenance window. The time of the maintenance window can vary, with Pacific Time being the default. On the Expense Report Attachments Migration Tool click **Schedule Migration**. A confirmation message appears on the page to notify you that the expense attachments migration has been successfully scheduled. The Schedule Migration button becomes inactive.

The scheduled migration appears on the Migration Details subtab as Queued. If you schedule a migration when no files are available to migrate, the Migration Details subtab still shows the Queued status, but no files will be migrated.

For large jobs, the migration will be automatically split into multiple runs of one hour each. When one run ends, the migration tool schedules another run for the next day. These automatically scheduled migrations continue until all expense attachments have been migrated. Additionally, if the migration tool encounters any unexpected issues during the run, it reschedules a migration for the next day. After a migration is finished running, an email notification is sent to the account administrator to confirm if the migration was successful or if it failed. The Migration Details tab shows the migration as processed. On the Expense Attachments subtab, the migrated files no longer appear in the list.

# Cancelling an Expense Report Attachments Tool Migration

If necessary, you can cancel a scheduled migration. You cannot cancel a migration that is already in progress.

To cancel an expense report attachments migration, open the Expense Report Attachments Migration Tool. For more information, see Enabling and Configuring the Expense Report Attachments Migration Tool. On the Expense Report Attachments Migration Tool, click **Cancel Migration**. This button is active only if there is a scheduled migration.

Any scheduled migrations are cancelled. A confirmation message appears on the page to notify you that the expense attachment migration was successfully cancelled. The Migration Details tab shows the migration as cancelled.

> **Note:** If you disable the Enhanced Security feature on the enable features page, any scheduled migrations will be cancelled.