



ForumPass Secure File Transfer User Guide

March 2018



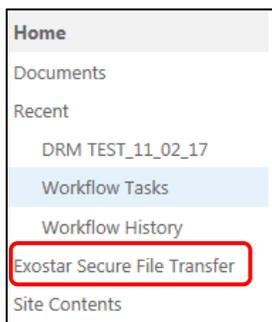


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[Summary](#)

ForumPass supports Secure File Transfer (SFT). This functionality allows users to securely transfer files of any size to other ForumPass users, as well as to external recipients. When activated, your ForumPass site provides access to the SFT feature via the **Exostar Secure File Transfer** link on the quick launch menu.



[Key Functionality Included in This Document](#)

This document is intended as a workflow guide for the ForumPass Secure File Transfer (SFT) functionality. A separate Administrator's Guide is available and located in the ForumPass US and UK Support Sites.

This document does not attempt to describe all ForumPass functionality, or all *out of the box* (OOTB) features of SharePoint 2013. Please refer to the ForumPass Product Guide for more information on using ForumPass.

[ForumPass Secure File Transfer](#)

ForumPass Secure File Transfer (SFT), is a subscription service which allows users to securely transfer files of any size to other ForumPass users, as well as to outside recipients.

[Subscribe to SFT](#)

The ForumPass SFT application is a premium service. If your organization is contracted to use SFT, it is listed on your **My Applications** tab in Exostar's Identity and Access Management Platform (MAG). To request access the service:

1. Login to Exostar's Identity and Access Management Platform (MAG) using your MAG credentials.
2. On the Home tab, locate **ForumPass Secure File Transfer** under **My Applications**.
3. Click **Request Access**.

Notes:

- You are notified by e-mail when your subscription request is approved.
- If you attempt to use SFT, but are not subscribed to the service, you receive an error

message stating you must first subscribe to the service.

For subscription information, please contact [Customer Support](#).

Navigating Secure File Transfer Packages

With **ForumPass - Secure File Transfer** you can create, send, and receive **Packages**, as well as check the status of a Package and access reports. A **Package** is any file transfer, either upload or download, and may include one or more files of any size and any file type. SFT can be used to send Packages to internal or external users you designate.

To access the SFT main page, click the **Secure File Transfer** navigation on the left side of your project site. The **Secure File Transfer** page displays the list of available pages and tabs:

- **Available Packages:** Shows all transfer packages you either sent, and/or have permission to download.
- **Send a Package:** Initiates the package transfer.
- **Request a Package:** Allows you to initiate a package request.
- **Server Status:** Displays the current space allocation on the transfer server.

Click the **Name** to view the contents and other details about that package.

Exostar Secure File Transfer (SFT)

Filter Results:

Available Packages	Send a Package	Request a Package	Server Status					
Name	Expiry	Upd...	Status	Pack...	Send...	Internal R...	External...	Commands
Test Package 1	02/09/20...	12/11/20... 16:11:30	completed	47,792	Teresa Cambetes	Teresa Cambetes	tcambetes@	Download

10 items per page 1 - 1 of 1 items

- The **Package Details** tab provides information about the package. You may also download or delete the package from here if you have permissions to do so.
- The **Package Activity** tab provide all of the details about the package.

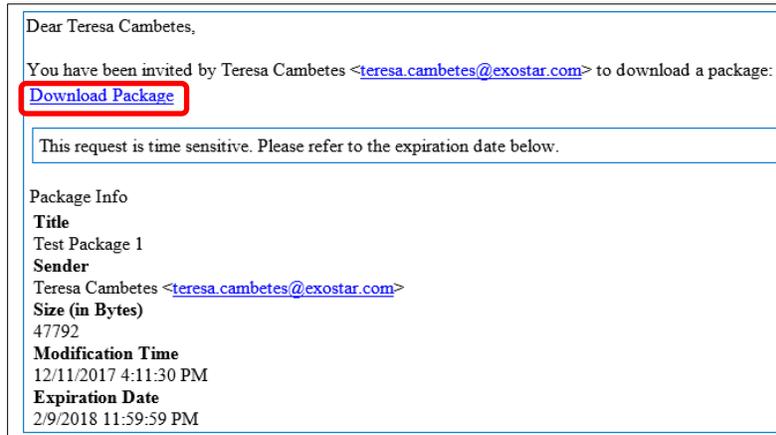


Download a Package

You can initiate the download of a package from the main SFT page, from the package information page, or from the email notification you received inviting you to download a package.

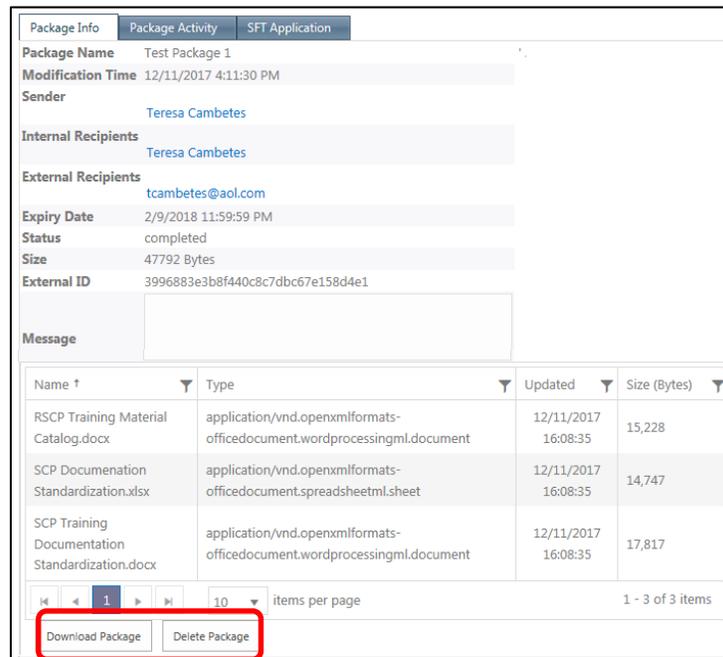
Internal User Downloads

1. Click the **Download Package** link in your email to initiate the download.



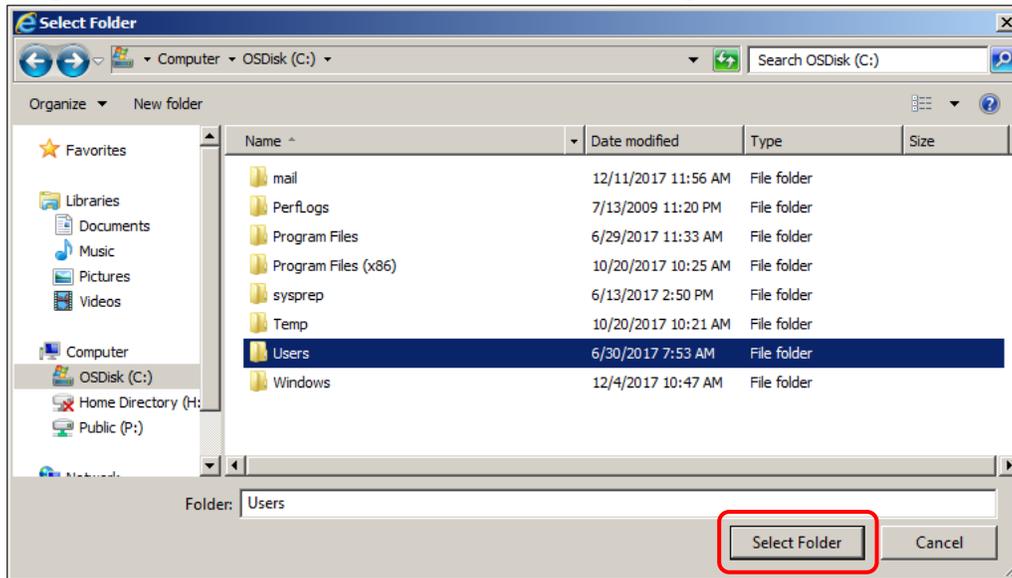
2. The **Package Information** screen provides Package details. Click **Download Package** to initiate or choose to delete.

Note: If you are not already logged in, you are prompted to login.

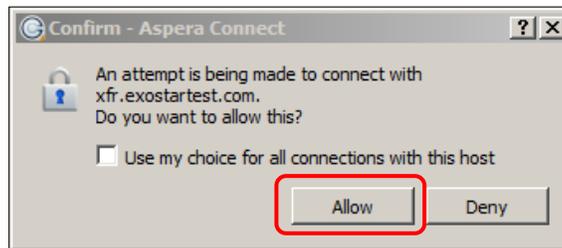


Note: The download button is unavailable if the expiry date passed.

3. Navigate to the desired folder to download the package. Click **Select Folder**.



4. The **Aspera Connect** prompt displays. Click **Allow** to proceed.



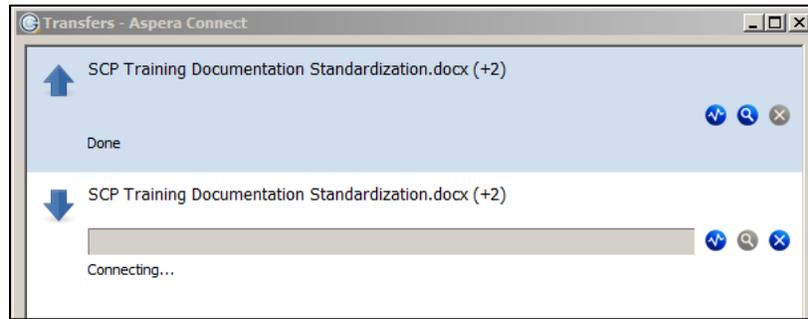
Note: If you want to avoid this prompt in the future, check the **Use my choice for all connections with this host** box.

5. If a passphrase was added to the files, you are prompted to enter that now.



6. The **Transfer** window displays the package download progress. The current **download** is

at the bottom of the list. Clear the list by clicking the **Clear List** button.

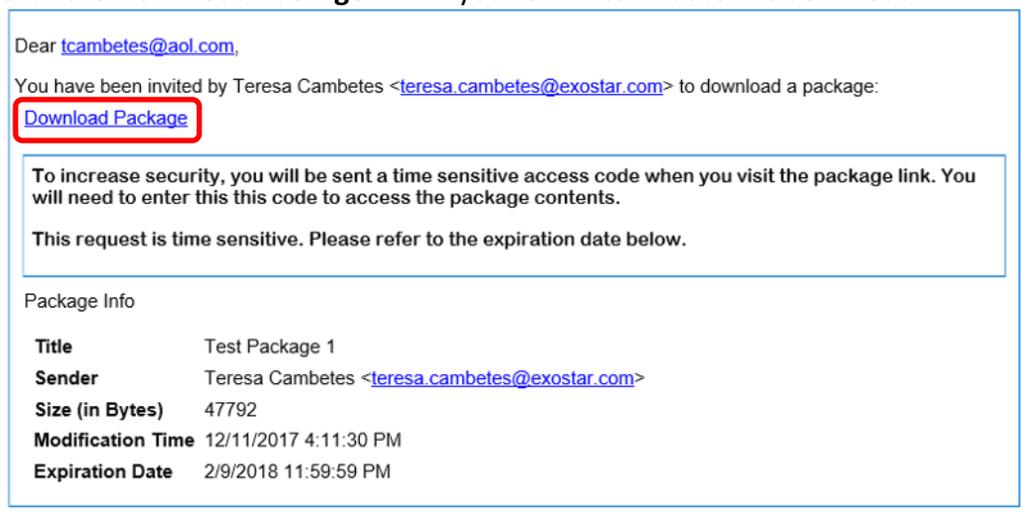


- **Transfer Monitor** icon displays the speed and status of your transfer.
- Click the **Magnifier** icon to navigate to the downloaded file location.
- Stop a transfer by clicking the **X**.
- Resume a transfer by clicking the **Start** button. The transfer resumes from where it was stopped.

7. When the package download is complete, navigate to the folder to open the file.

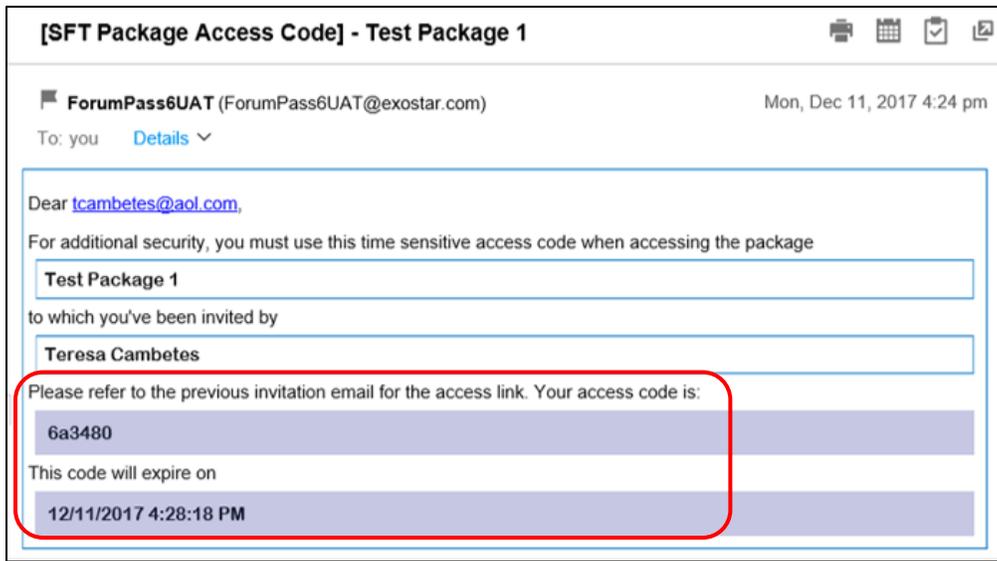
External User Downloads:

1. Click the **Download Package** link in your email to initiate the download.



2. Once you access the package, you receive a second email containing an access code. The

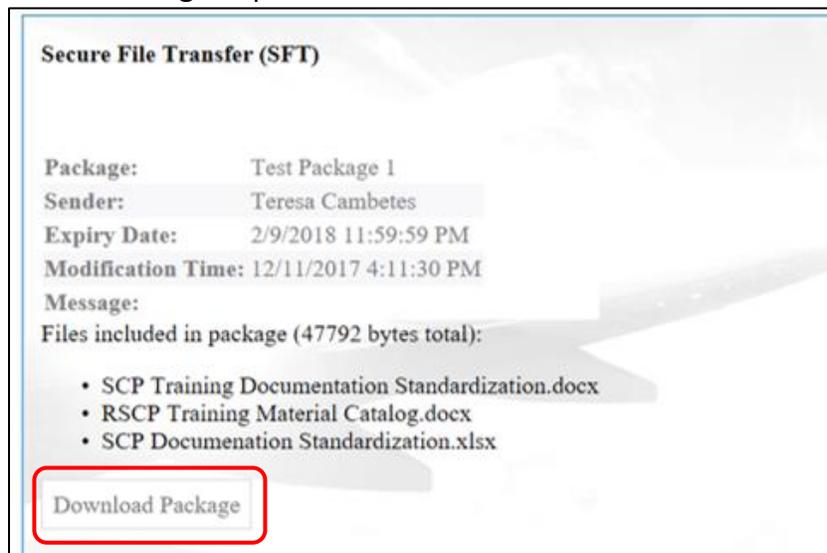
access code is time sensitive and must be used to initiate the download.



3. Return to the download screen and enter the access code. Click **Continue**.



4. Click **Download Package** to proceed.



Send a Package

In order to send file packages via SFT, you must have Aspera Connect installed. If you do not have it installed, you can do so from within the solution by following the onscreen prompts.

With Aspera Connect installed, you can proceed with sending a package.

1. From the main SFT page, click the **Send a Package** tab and complete the form:

Exostar Secure File Transfer (SFT)

Available Packages | **Send a Package** | Request a Package | Server Status

Package Name
[Text Field]

Internal Recipients
[Text Field]

Internal ForumPass users included here will receive the package

External Recipients
[Text Field]

Invite external users via email. Enter one email address per line.

Download Limit
External users may download this package times.

Encrypt at Rest
 This option will encrypt the package with a passphrase

Expiry Date
February 2018
Calendar showing days of the month. The 9th is selected.

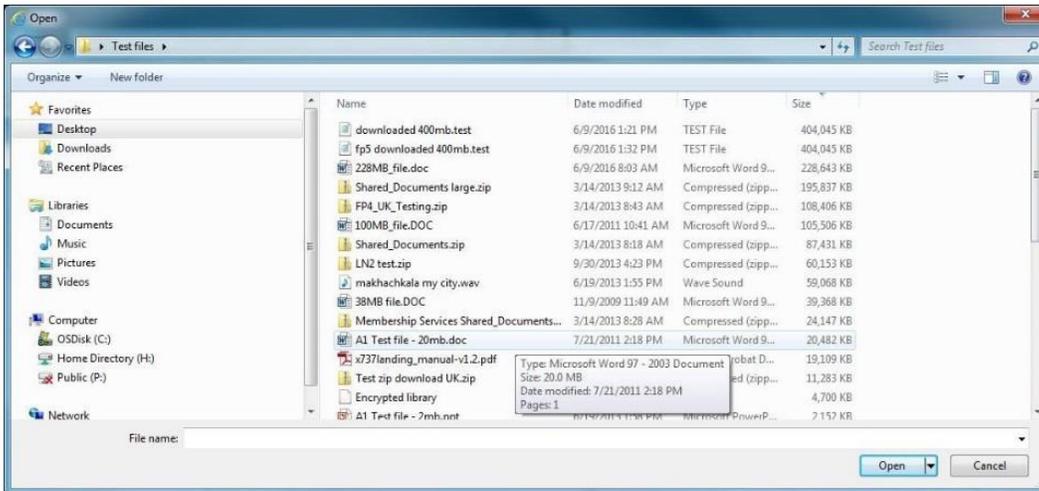
The package will be deleted after this date.

Add Message
[Text Field]

This message will be included in the package invitation.

- **Package Name:** The recipients use the name you give this package to identify the package.
- **Internal Recipients:** List the users inside your organization and click the **Check Names** icon. The user names are verified as authenticated ForumPass users.
- **External Recipients:** List the email address of external recipient (not an authenticated ForumPass user). **Note:** This option may not be available if your company restricted this functionality.
- **Download Limit:** You can limit the number of times a recipient can download the package up to five downloads (three is the default).
- **Encrypt at Rest:** You can add a passphrase to the package. The recipients must know the passphrase to download the package. You should provide that information to the recipient outside of ForumPass (through text, email, or telephone).
- **Expiry Date:** Select a date no more than 90 days out. This date marks when the package is removed from the transfer server. After that date, the package is not available to any recipients.
- **Add a Message:** This message transfers with the package, and can provide instructions to the recipient.

2. Click **Upload Files** and select the files you wish to transfer.



3. The **Aspera Connect** prompt requires you to click **Allow** to proceed.

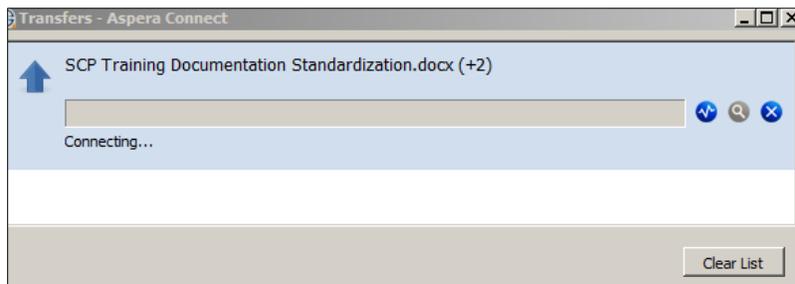


Note: If you would rather not receive this prompt, check the **Use my choice for all connections with this host** box.

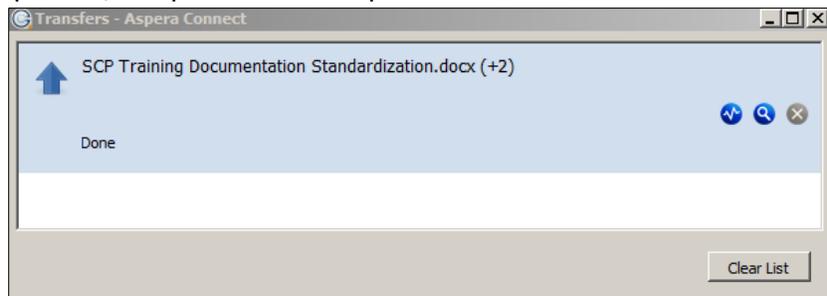
4. If you chose to include a passphrase for your package, you are prompted to enter the phrase now.



5. The Aspera Connect window opens and begins the package transfer.



Note: Upon completion, the process area reports **Done**.



Note: Recipients of this package (the people you named in the upload form) receive an email inviting them to download the package. If the person does not download the file prior to the expiry date, you have to upload it again.

Server Status

The Server Status tab on the main SFT page shows the available/used space on the file transfer node. You are not able to transfer a package larger than the available space on the server.

