



Yale Secure File Transfer User Guide

This document provides information and detailed steps for using Yale's new file transfer service tool – Yale Secure File Transfer. This updated secure file transfer utility is based on 'FileLocker', an open source software.

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Introduction

Yale Secure File Transfer has replaced the Yale File Transfer Facility (also known as – transfer.med.yale.edu). This system is for members of the Yale community with an active NetID. It facilitates the transferring of files in a secure environment between Yale individuals or Yale individuals and their outside collaborators.

The basic functionality of this file transfer tool remains the same. Files are temporarily and securely uploaded to a server via the web tool and a system generated email message is sent to the intended recipient(s) with an URL link to retrieve the file.

Yale Secure File Transfer offers new and improved features to manage your transferred files. Some of the new features include: a built-in virus and malware scan, the ability to remove the files off the server prior to the 10-day period (Note: Yale ITS reserves the right to remove files sooner if necessary) and a Manage Groups capability.

This document contains detailed instructions. Quick Help is also available on the right side of the home page once logged into the application or, contact the Yale ITS Helpdesk, 203-432-9000 for more information.

Anyone using this system is doing so with the understanding of the Information Technology Appropriate Use Policy located in Yale’s Policies www.yale.edu/ppdev/policy/

CAS (Central Authentication Service) log in required

Access to Yale Secure File Transfer requires logging in using CAS

Yale *Central Authentication Service*

Login required
You may establish Yale authentication now in order to access protected services later.

NetID:

Password:

Warn me before logging me in to other sites.

Login

Please note
Before entering your NetID and password, verify that the URL for this page begins with: <https://secure.its.yale.edu>
To protect your privacy, quit your web browser when you are done accessing services that require authentication.

CAS Login
CAS Logout
Help with CAS
Feedback

Forgot your password?
Changing your password

SECURED BY
GeoTrust
click to verify
03-May-11 17:07 GMT

All members of the Yale community (students, faculty and staff) with an active NetID are eligible to use this tool. Please use your Yale NetID and password in the appropriate fields of the CAS login window.

Non-Yale members will need a Request Upload email from their Yale contact to access the system to upload and send files. (For more information, please refer to the Request Upload Steps by a Yale Person)

Navigating through the home page

The home page can easily be categorized into four areas:

1. The Functional buttons: Upload, Manage Groups and Delete
2. The List area: Uploaded Files, Files Shared with You and Uploaded Requests
3. The Account Management area: Your name and NetID, User Quota, History, Messages, Account and Logout
4. The Quick Help menu sidebar area

The screenshot shows the Yale Secure File Transfer interface. At the top right, the user's name 'Michelle Porchia (mp672)' and 'User Quota' are displayed, along with links for 'History', 'Account', 'Messages', and 'Logout'. The main content area is titled 'My Files' and contains three buttons: 'Upload', 'Manage Groups', and 'Delete'. Below these buttons is a table of 'Uploaded Files' with columns for 'Name', 'Size', and 'Expires'. The table lists several files, including 'Beethoven's Symphony No. 9 (Scherzo).wma' and 'Blue hills.jpg'. Below the 'Uploaded Files' table is a section for 'Files Shared with You (1)' containing one file: 'Cherry-Blossoms-300x225.jpg'. At the bottom of the main content area is a section for 'Upload Requests (0)'. On the right side of the page, there is a sidebar with the heading 'Yale Secure File Transfer' and a description of the service. Below the description is a 'Request Upload' button and a 'Quick Help' section with links for 'How do I upload a file?', 'How do I share a file?', and 'How do I send a message?'. A 'Quick Tip' section is also present, advising users to hover over the messages link to see the number of new messages.

1

2

3

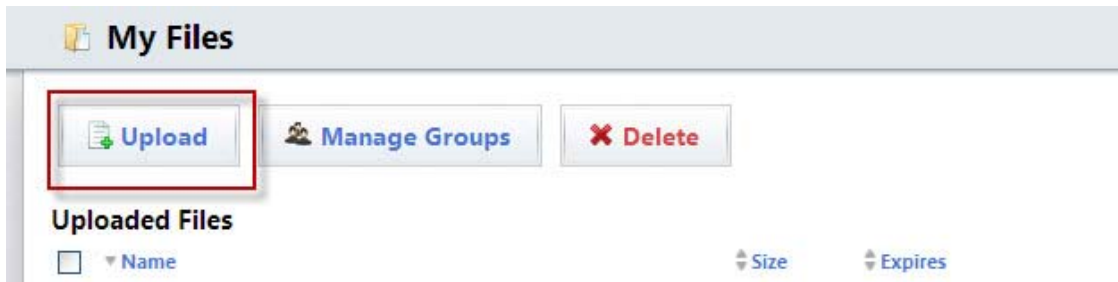
4

Note: As a security measure, the system will automatically timeout and you will need to log back in.

Sharing Files

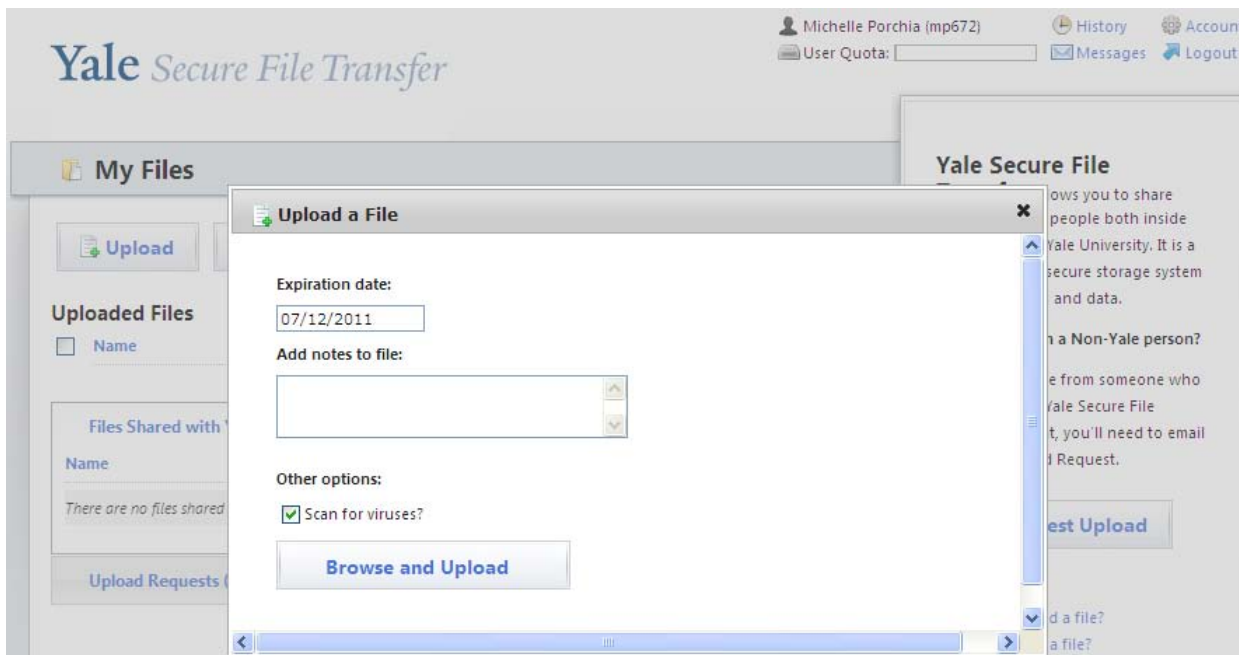
Yale user who needs to transfer files to another Yale person.

1. Click the "Upload" button

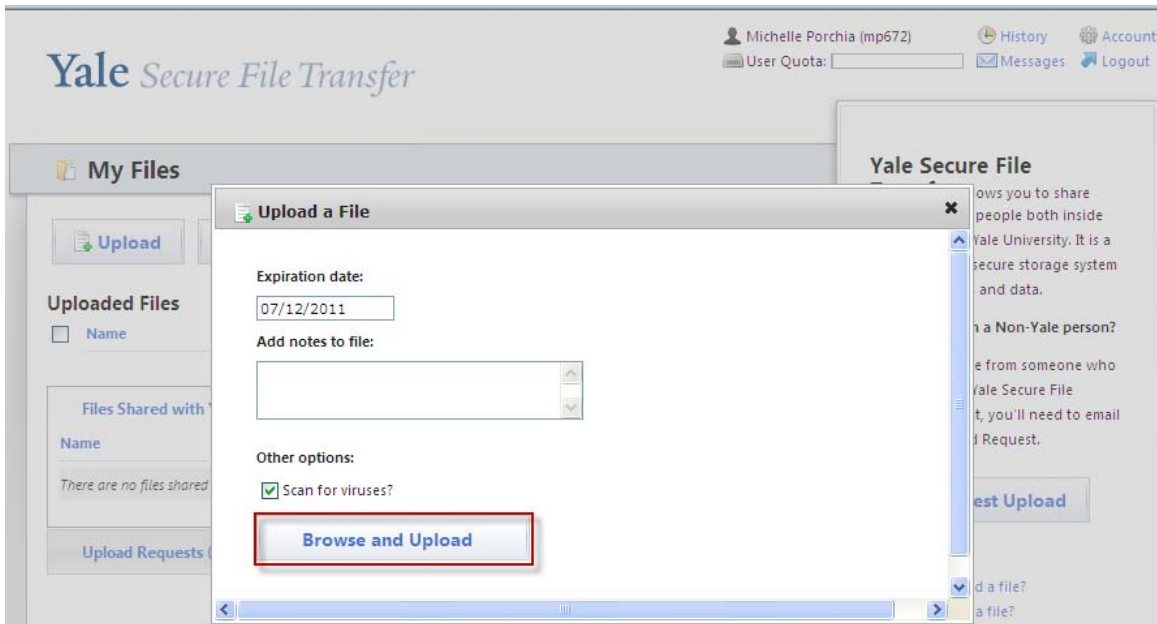


The "Upload a File" message box will appear. You will have the option of typing a note, up to 250 characters, which will be associated to the file in your uploaded files list.

Note: The text of the "Add notes to file;" will appear in the email the recipient receives.

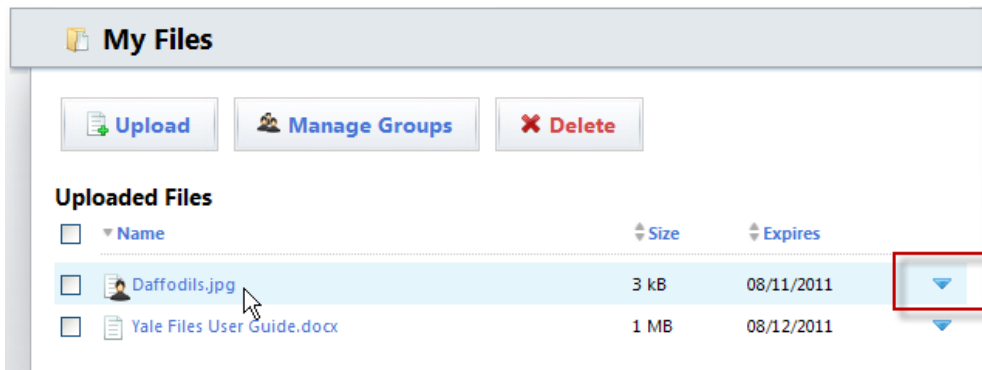


2. Click "Browse and Upload".



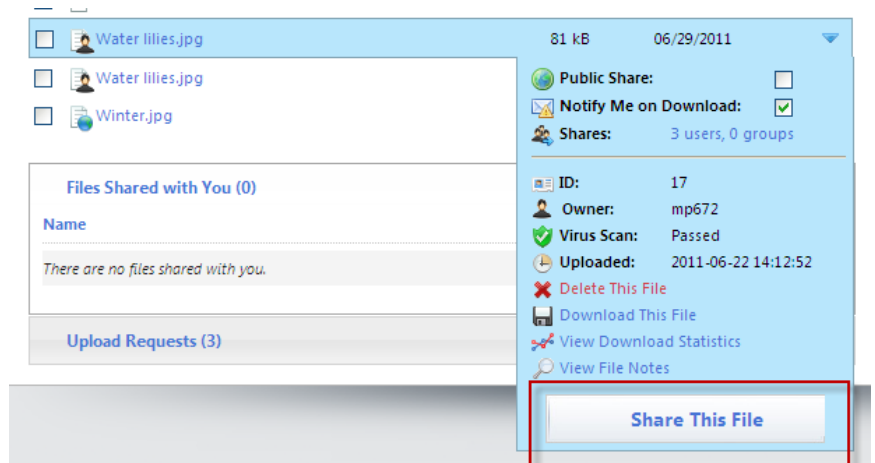
This will open your system's file directory allowing you to search for the file you need to upload. Once uploaded, the file will appear in the "Uploaded Files" area.

3. Click the file name or drop down arrow of the file you want to share with the recipient.

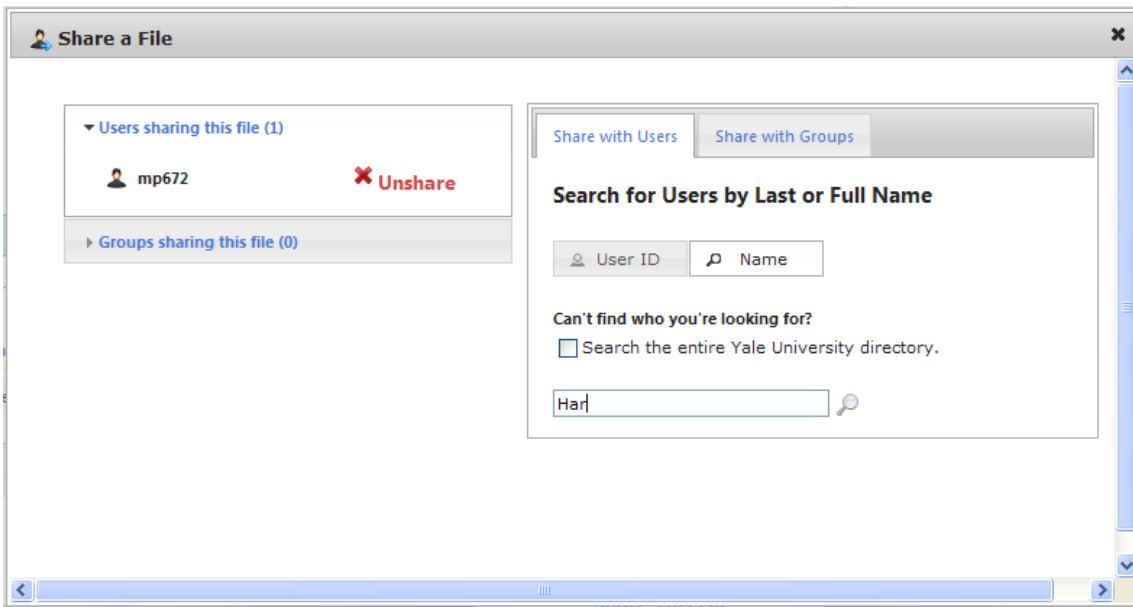


The file information box will appear.

4. Click "Share This File"



5. Enter Yale NetID or name of the recipient in the “Search for User by ID”



Note: Click the “Search the entire Yale University directory to find a name.

You may add as many names as you need. The list of recipients will appear in the “Users sharing this file” area on the left by their Yale NetID.

(If you are sending to the same people over and over, you may want to consider creating a group. See the section titled *Managing Groups*.)

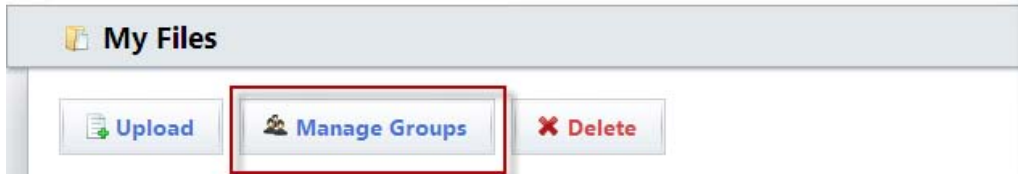
The Yale recipient will receive an email notification.



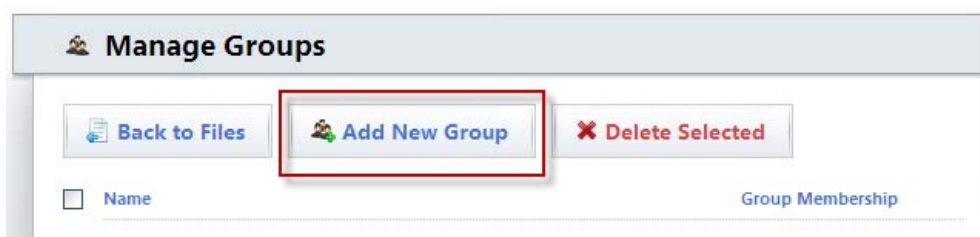
Managing Groups

This area allows you to create and edit groups of users within Yale only. (For Non-Yale lists refer to the section on *Yale Person Sharing a File with someone Outside of Yale*)

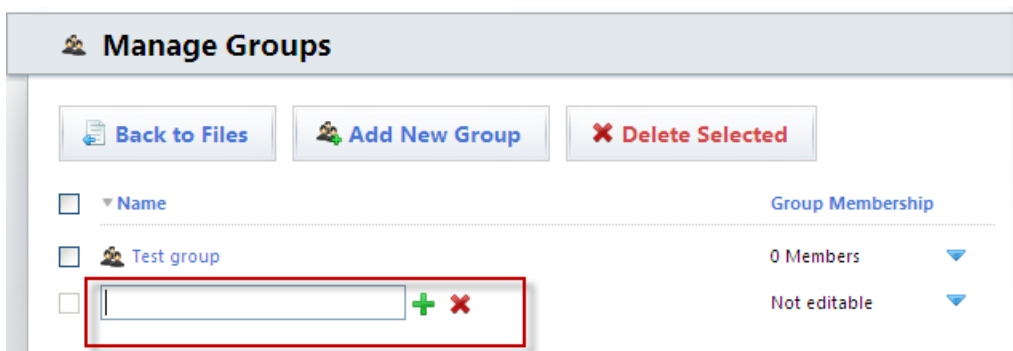
1. Click the functional button “Manage Group” located at the top of the home page.



2. Click the “Add New Group” button.



3. Enter a group name and click on the plus sign.



- Click the group name in your list and use the Manage Group button to add group members using the “Search for User by ID” box.

Manage Groups

[Back to Files](#) [Add New Group](#) [Delete Selected](#)

Name Group Membership

CM Team 0 Members

new name This group contains no members.

New Name2

[Rename Group](#)

[Manage Group](#)

Manage Groups
This area allows you to create, edit, and delete groups of users in your organization.

Quick Help
[How do I upload a file?](#)
[How do I share a file?](#)
[How do I send a message?](#)
[Show all...](#)

Quick Tip
Share or delete multiple files, groups, and messages using checkboxes. [Show all...](#)

Name Group Membership Quick Help

View Group Membership ✕

Members in Test group

Audrey Bribiescas ✕ Remove

Kevin Brigham ✕ Remove

Add Users

Search for Users by ID

Important: To return to My Files (home page), use the “Back to Files” button.

Manage Groups

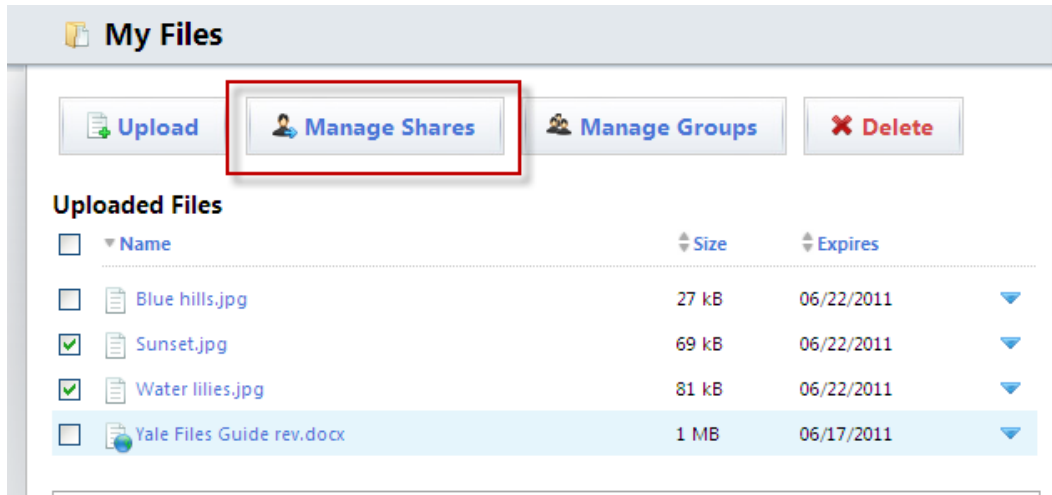
[Back to Files](#) [Add New Group](#) [Delete Selected](#)

Name Group Membership

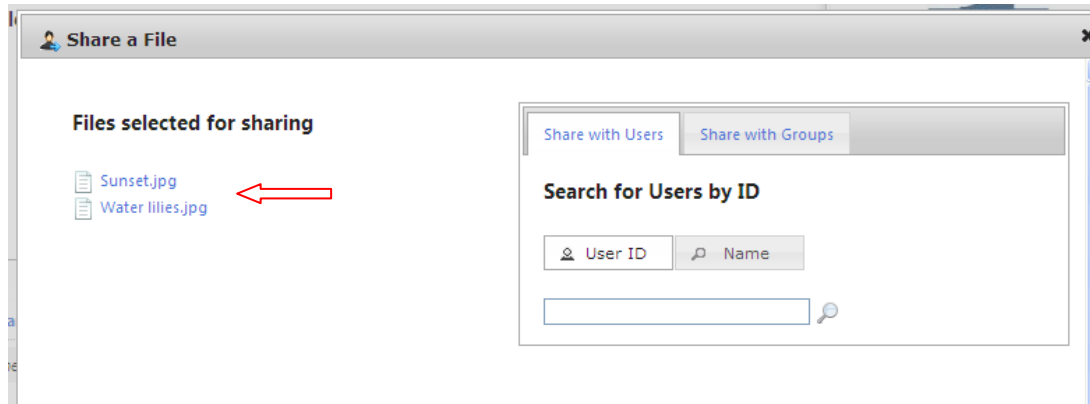
Test group 2 Members

Yale User Sharing Multiple Files with a Yale Person

1. Upload the files you want to share.
2. Click on check boxes to the left of the file name to select files. As soon as you check more than one file, a “Manage Shares” box appears.



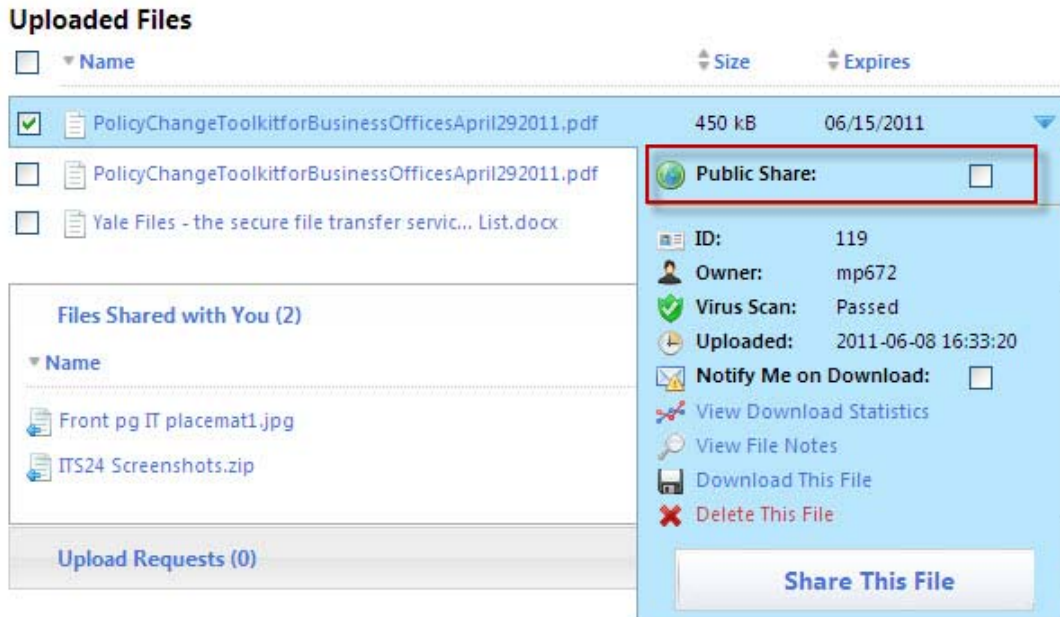
3. Click “Manage Shares”, once you are done selecting all the files.
4. Enter Yale NetID or name of recipient in the field box for “Share with Users” or “Share with Groups”. Note the files you selected on the left side.



Yale Person Sharing a File with a Yale Department Email Address

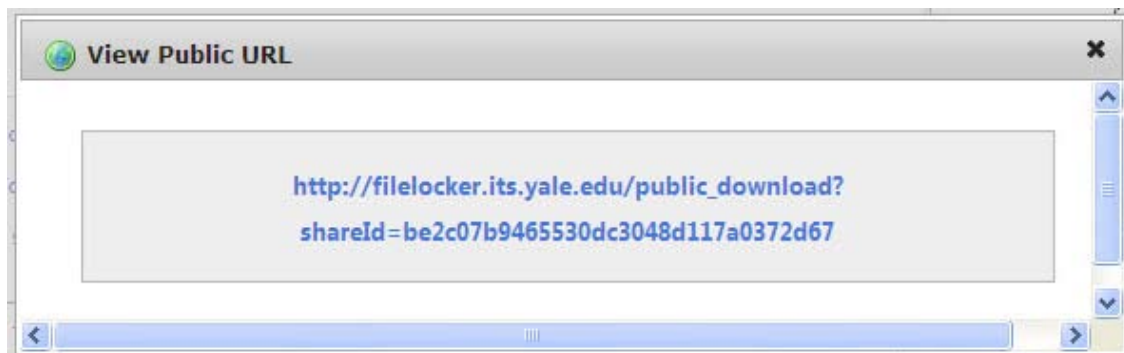
For a Yale department email address, you will need to use the “Public Share” option to transfer a file. Use the same steps to upload the file.

1. Click the file name to drop open the file information box and check the “Public Share:” box.



2. Enter the Yale department email address.
3. Click, “Share”.

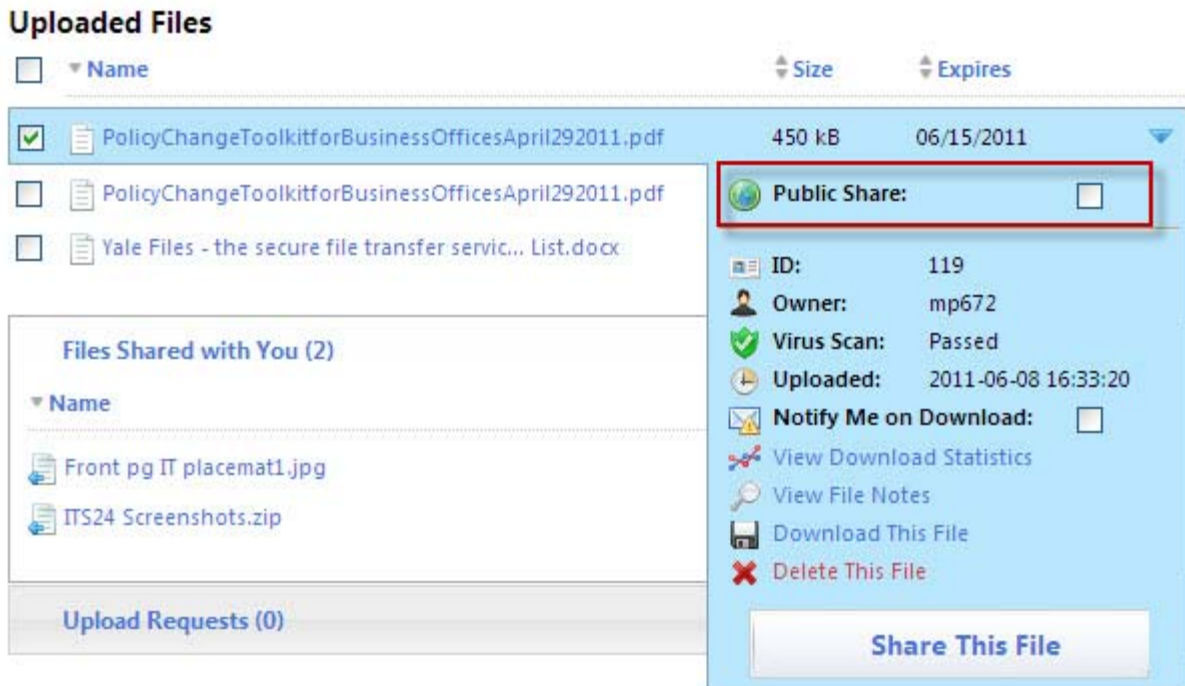
You will receive a message box showing you the Public URL. This indicates the email has been sent to the recipient with this file location information. Close the box by clicking on the “x” in the upper right.



Yale Person Sharing a File with someone outside of Yale.

To transfer a file to someone outside of the University, follow the previous instructions for uploading a file.

1. Click on the file name and check the box for “Public Share:”



The screenshot shows the 'Uploaded Files' section of a file sharing interface. The file 'PolicyChangeToolkitforBusinessOfficesApril292011.pdf' is selected, and its details are shown on the right. The 'Public Share' checkbox is checked, and the 'Notify Me on Download' checkbox is unchecked. Other details include ID: 119, Owner: mp672, Virus Scan: Passed, and Upload Date: 2011-06-08 16:33:20. A 'Share This File' button is visible at the bottom right.

Name	Size	Expires
<input checked="" type="checkbox"/> PolicyChangeToolkitforBusinessOfficesApril292011.pdf	450 kB	06/15/2011
<input type="checkbox"/> PolicyChangeToolkitforBusinessOfficesApril292011.pdf		
<input type="checkbox"/> Yale Files - the secure file transfer servic... List.docx		

Files Shared with You (2)

Name
Front pg IT placemat1.jpg
ITS24 Screenshots.zip

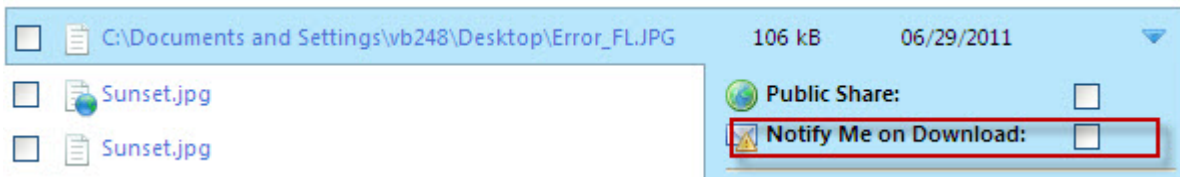
Upload Requests (0)

File Details:

- Public Share:
- Notify Me on Download:
- ID: 119
- Owner: mp672
- Virus Scan: Passed
- Uploaded: 2011-06-08 16:33:20
- [View Download Statistics](#)
- [View File Notes](#)
- [Download This File](#)
- [Delete This File](#)

[Share This File](#)

If you want to be notified that the recipient has received the file, check the “Notify Me on Download” first then check the “Public Share”.



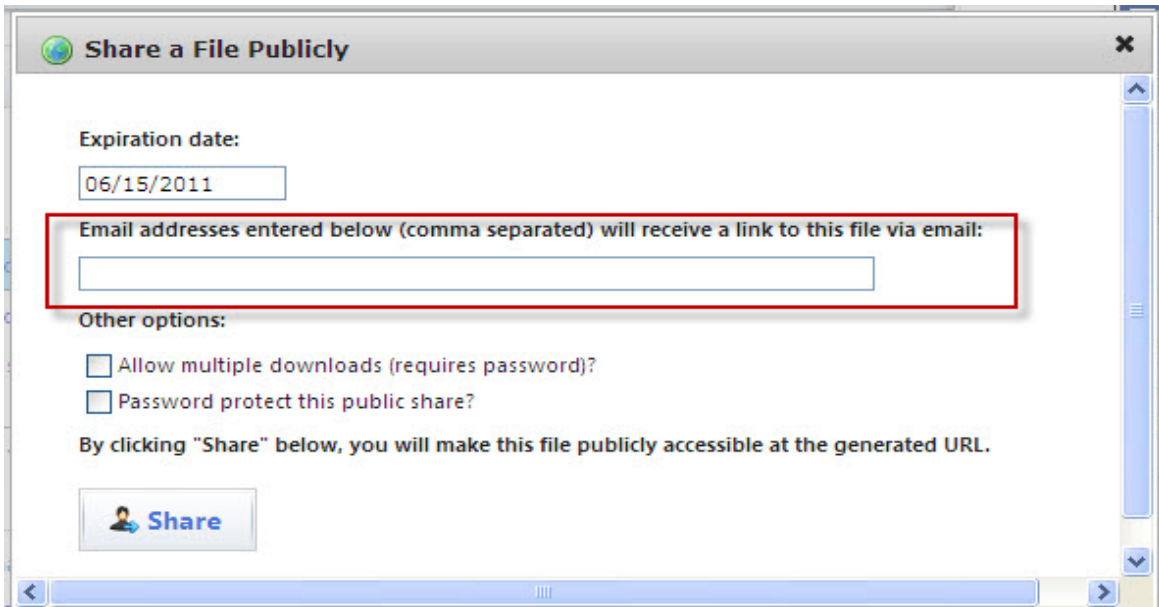
The screenshot shows the 'Uploaded Files' section of a file sharing interface. The file 'Sunset.jpg' is selected, and its details are shown on the right. The 'Notify Me on Download' checkbox is checked, and the 'Public Share' checkbox is unchecked. Other details include ID: 106 kB, Expires: 06/29/2011.

Name	Size	Expires
<input type="checkbox"/> C:\Documents and Settings\vb248\Desktop>Error_FL.JPG	106 kB	06/29/2011
<input type="checkbox"/> Sunset.jpg		
<input checked="" type="checkbox"/> Sunset.jpg		

File Details:

- Notify Me on Download:
- Public Share:

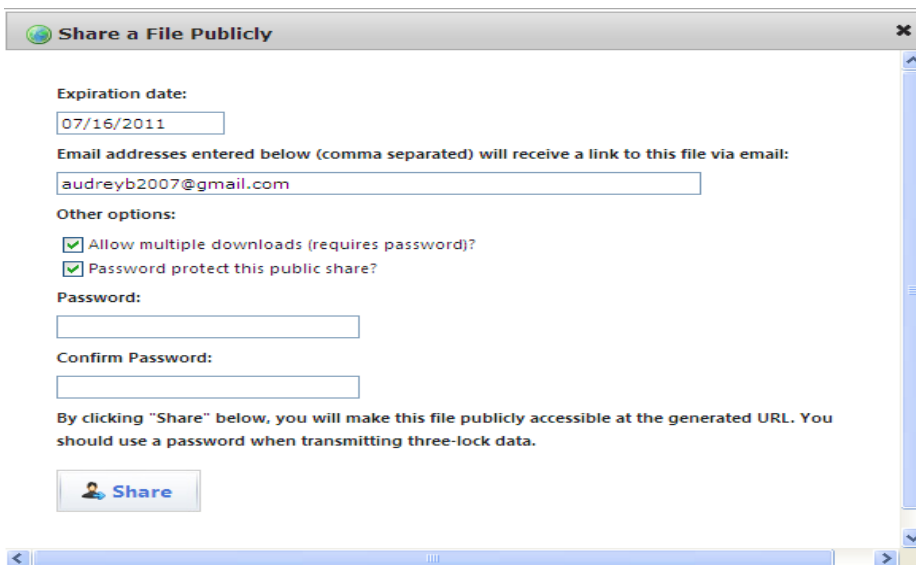
2. Enter the email addresses separated by commas (You may cut and paste a pre-created list separated by commas).



3. Click "Share".

IMPORTANT: For multiple recipients, a password is always required. (If you do not use this option only one person in the list will be able to download the file.)

Click the "Allow multiple downloads" checkbox and the "Password protect this public share" checkbox.

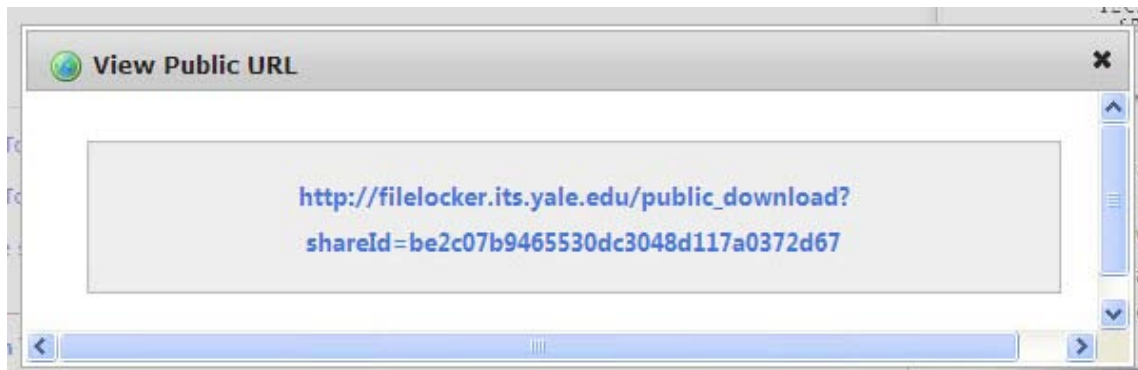


Enter a password and confirmation.
(DO NOT use your Yale NetID password)

Click "Share".

Note: It is best to keep the URL and password separate from each other. You can notify the people in your list of the password either via email or phone. The non-Yale recipients will need to enter the password to download the file.

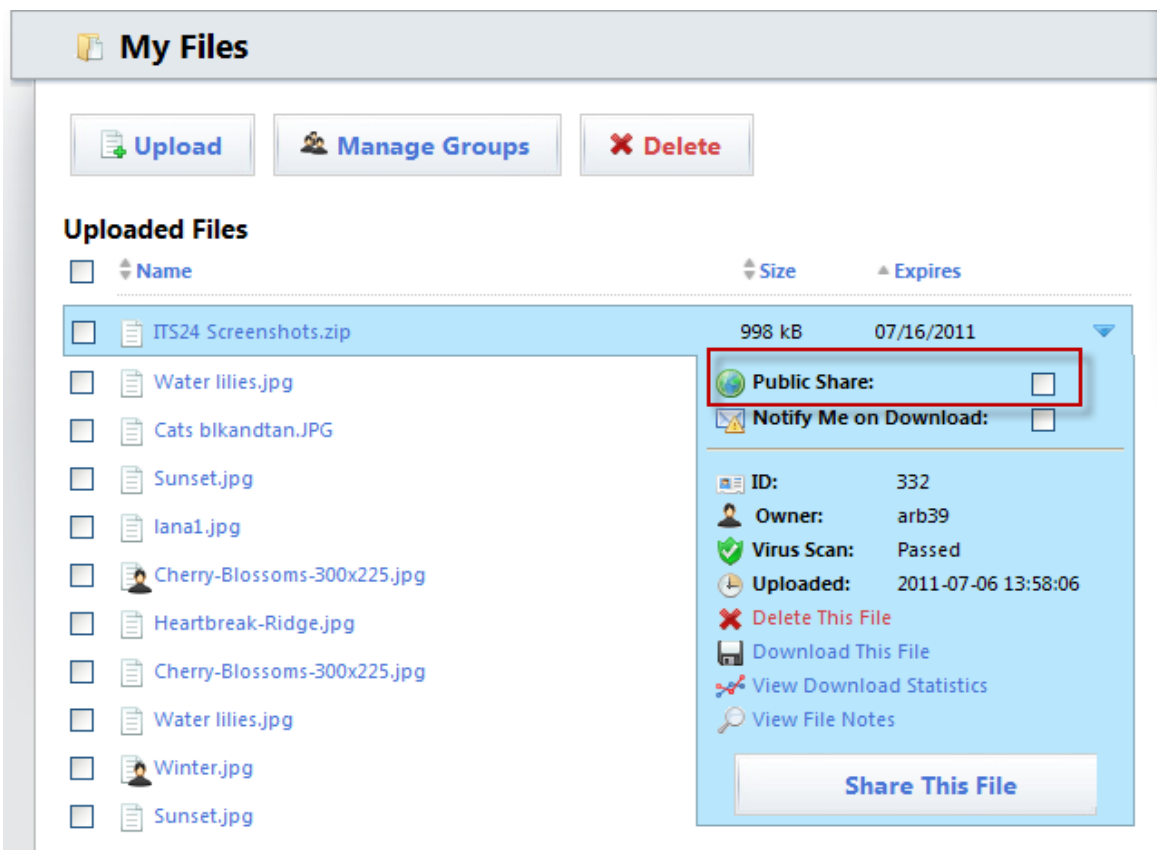
After you click "Share", you will receive a message box showing you the Public URL or file location information. This indicates that the email with the download link has been sent.



Yale User sharing multiple files with someone outside of Yale

To only way to send multiple files to a recipient outside of Yale, is to zip them and save the file on your computer first. When you click the Browse and Upload button, select the Zip file you just created.

Follow the same three steps above for Sharing a File with someone outside of Yale.



Note: Once a file has been shared using this Public Share function, do not publicly share the same file again – this will cause the file link (URL) for your first recipient to lose access to the link and they will not be able to

download the file. You will need to either view the link and send that in a separate email or upload the same file again and send it to all the recipients.

A Yale Person who needs a file from a Non-Yale person - Request Upload

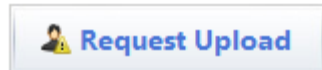
Do you need a file from someone outside of Yale?

1. Click the “Request Upload” button on the right side of the homepage of Yale Secure File Transfer.

A system generated email will be sent to the Non-Yale person granting him/her access to upload (transfer) files to you, the Yale recipient.

Need a file from someone?

If you need to get a file from someone outside of the University, you can send an Upload Request to their e-mail address.



2. Fill in the information in the “Request to Upload” message box

A screenshot of a web browser window showing a dialog box titled "Request Upload to Yale Secure File Transfer". The dialog box has a grey header bar with a close button (x) on the right. Below the header, there are several input fields and checkboxes. The first field is labeled "Request expiration date:" and contains the text "08/11/2011". Below it is a field labeled "Send request to email:" which is empty. Underneath that is a field labeled "Add message to email:" which is also empty. At the bottom, there is a section titled "Other options:" with three checkboxes: "Allow multiple file uploads for this request (requires password)?", "Force a virus scan for uploaded files?" (which is checked), and "Password protect this upload request?". At the bottom of the dialog box is a button labeled "Create Request" with a small icon of a person with a yellow triangle above their head.

NOTE: Click the Other options checkboxes if you would like to grant this person the ability to perform multiple file uploads. A password is needed for this functionality and should be one that is used solely for the purpose of transferring files. (Do Not Use your Yale NetID password.) Remember, it is best to keep the URL and password separate from each other. The Non-Yale person will need to enter the password for each upload using the same link in the email.

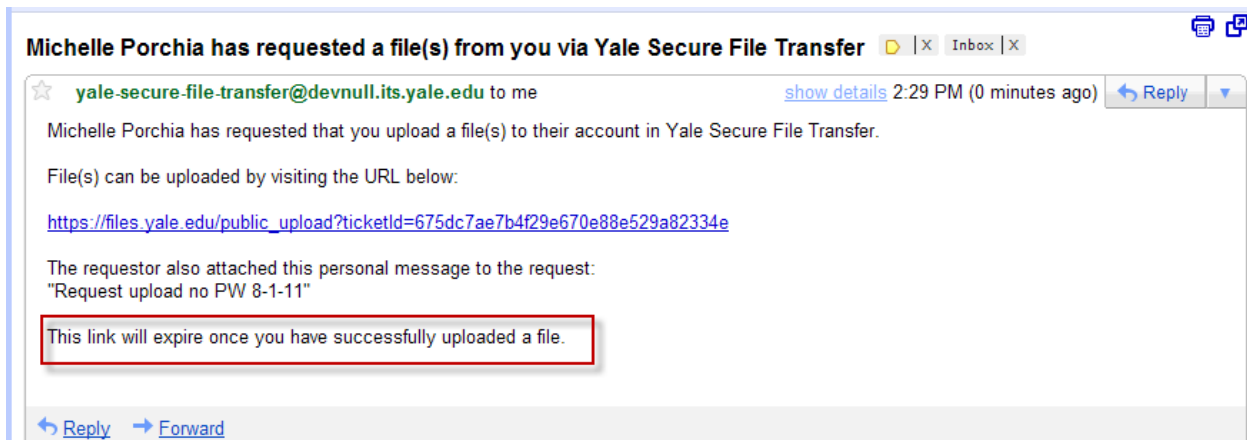
3. Click, “Create Request”.

A Non-Yale person needs to share a file with a Yale Person

A Non-Yale person must receive A Request Upload from a Yale person in order to transfer a file to that Yale person.

You will receive a system-generated email notifying you that your Yale contact has provide you the link to transfer files. The email will have the Subject: *Your Yale Contact has requested a File(s) from You via Yale Secure File Transfer*. The requestor may include a personal message in the email.

1. Click the link in that email.



Note: "This link will expire once you have successfully uploaded the file" unless you have been granted multiple uploads.

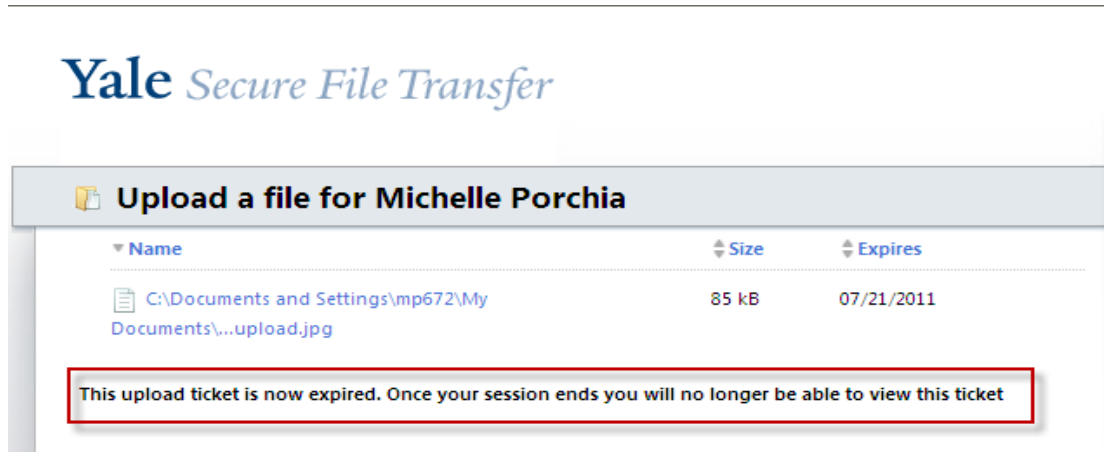
2. Enter text in the "Add notes to file" - a brief description to help identify it within a list.

The screenshot shows the "Yale Secure File Transfer" interface. The title is "Upload a file for Michelle Porchia". There is a table with columns "Name", "Size", and "Expires". Below the table, there is a form with the following fields: "Expiration date:" with a text box containing "07/21/2011"; "Add notes to file:" with a text area; and "Other options:" with a checked checkbox labeled "Scan for viruses (The user has requested that this file undergo a virus scan)". At the bottom, there is a "Browse and Upload" button.

3. **Click** the “Browse and Upload” button.

This will open your system’s file directory allowing you to search for the file you need to share.

Once you share the file, you will receive a message similar to the one below. This indicates the file was transferred and you were granted a single upload.

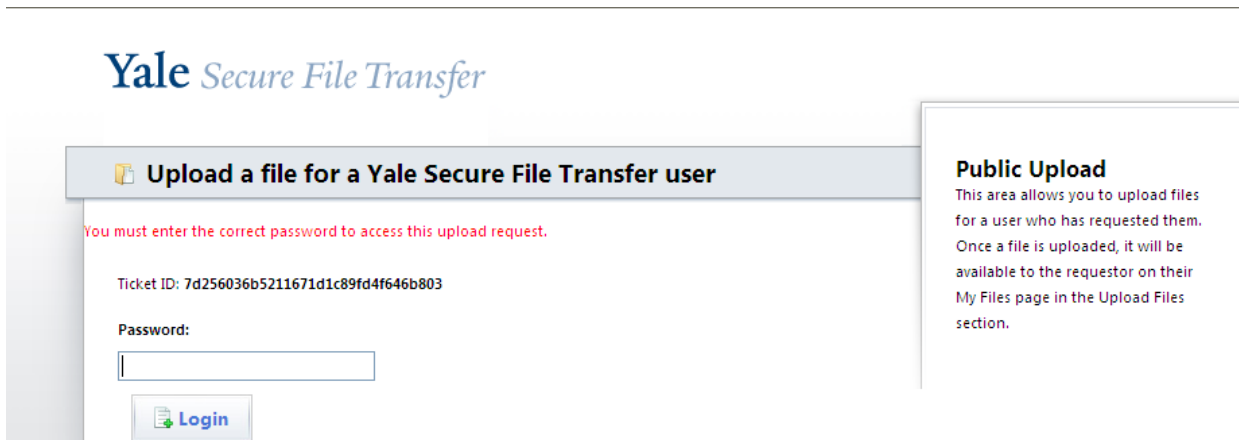


This concludes your actions. Close your browser.

If your Yale contact granted you multiple uploads, a password is required.

Your Yale contact will need to provide you with the password for the link.

Enter the password you were provided.



If multiple uploads were granted, please do not misplace the email. You, as the Non-Yale person, will need to use this same URL in this email and you will need to enter the password for each use. Remember, it is best to keep the URL and password separate from each other. Also there is an expiration date associated with each request upload. If the first Request upload has expired a new one will need to be sent.

For each upload you will need to repeat step number 3 above.

Upon a successful upload, your Yale contact will have the file you just shared in their *Upload Files* area on their home page.

All she/he will need to do is download and save the file.

This concludes the Non-Yale to Yale file transfer process.

Receiving files from a non-Yale person via Upload Request

The file received via the “Request Upload” will appear in the “Uploaded Files” area. Be sure to download and save the file.

Uploaded Files

<input type="checkbox"/>	Name	Size	Expires	
<input type="checkbox"/>	Beethoven's Symphony No. 9 (Scherzo).wma	599 kB	07/12/2011	▼
<input type="checkbox"/>	Beethoven's Symphony No. 9 (Scherzo).wma	599 kB	07/15/2011	▼
<input type="checkbox"/>	Blue hills.jpg	27 kB	07/15/2011	▼
<input type="checkbox"/>	C:\Documents and Settings\mp672\My Documents\...upload.jpg	83 kB	07/16/2011	▼
<input type="checkbox"/>	check file box.jpg			
<input type="checkbox"/>	download file to you.jpg			
<input type="checkbox"/>	download this file.jpg			
<input type="checkbox"/>	email notification public.jpg			
<input type="checkbox"/>	Water lilies.jpg			

Files Shared with You (3)

<input type="checkbox"/>	Name
<input type="checkbox"/>	Cherry-Blossoms-300x225.jpg

File Details:

- Public Share:
- Notify Me on Download:
- ID: 341
- Owner: mp672
- Virus Scan: Passed
- Uploaded: 2011-07-06 16:13:55
- Delete This File
- Download This File
- View Download Statistics
- View File Notes

[Share This File](#)

Receiving Shared Files

File Has Been Shared with You (Yale to Yale transfer)

You will receive a system generated email notifying you that someone has shared a file with you. It will list the file name(s) and the link to log into the system.

The file will appear listed in your “Files Shared with You” area. You will need to download the file off the server and SAVE it on your local computer to avoid the risk losing the file.

1. Click the link in the email (If you are not already logged in to CAS, the CAS screen will appear and you will need to log in to the system.)

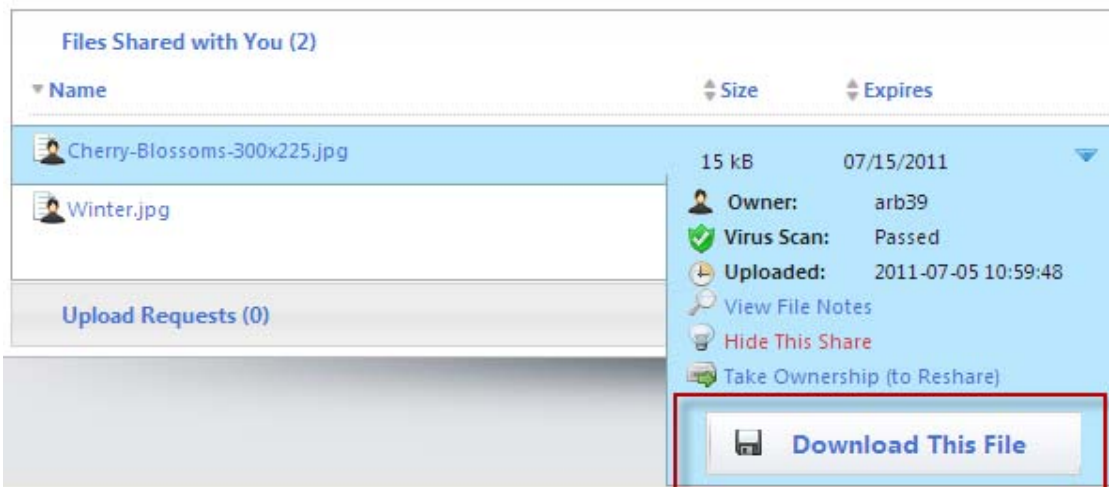


2. Located the file name in the area titled “Files Shared with You”.

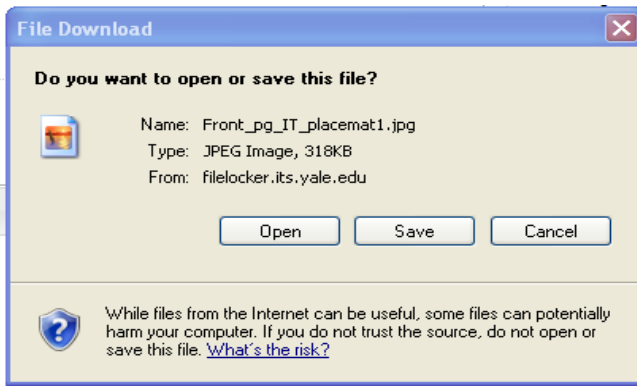


If the sender provided notes for this file, there will be a link to “View File Notes” in the file information box.

3. Click on “Download This File”.



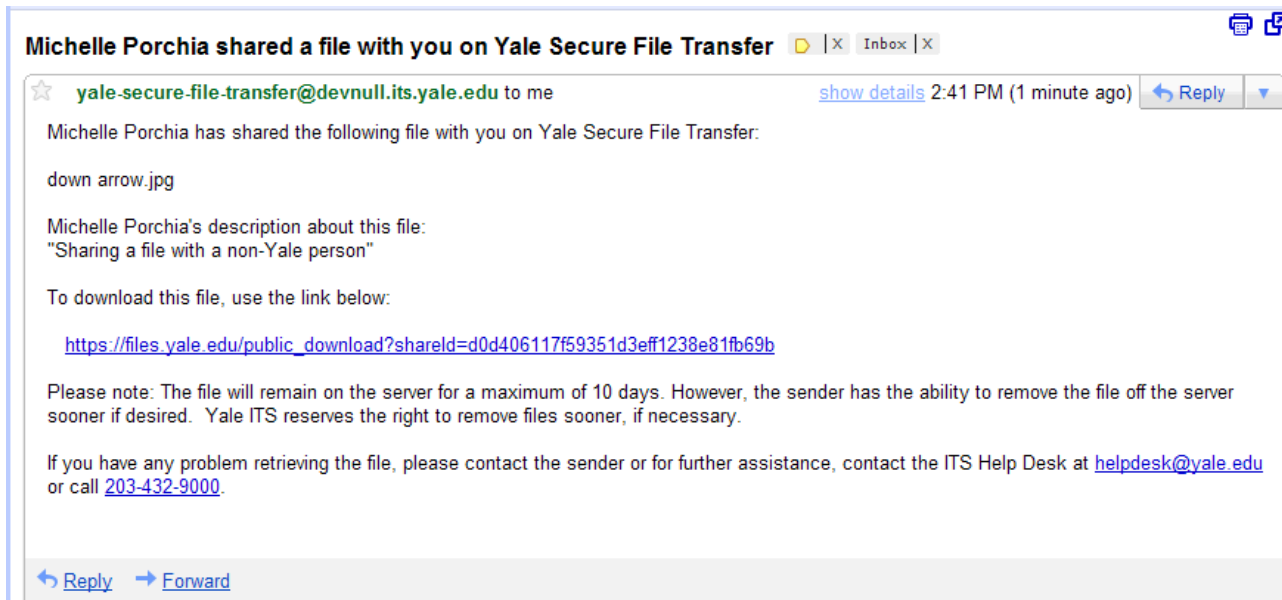
4. Choose "Save".



The receiver will need to download and save the file off the server or will be unable to access the file once it expires. If you open the file you are only viewing the file and not saving it to your local computer.

A non-Yale person receiving a shared file from a Yale person

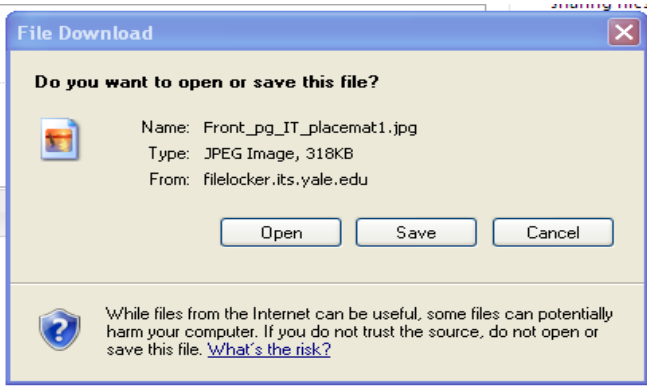
A non-Yale person will receive a system-generated email with the Subject: *Yale Contact Name has shared a file with you on Yale Secure File Transfer*. It will contain the file name and the link to download the file. Be sure to save the file.



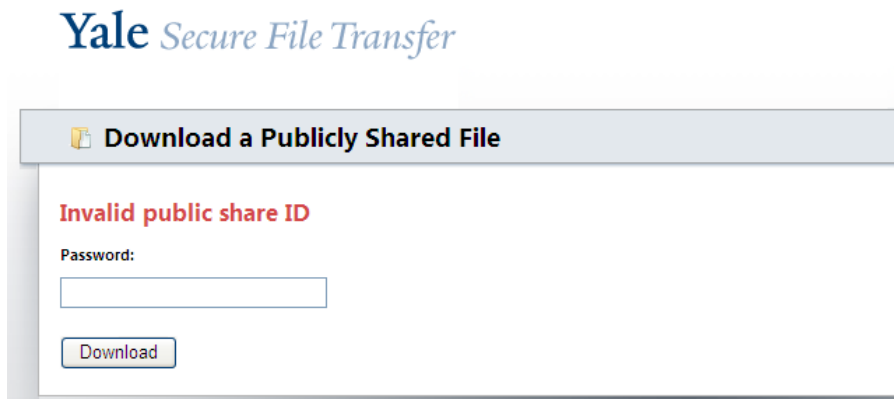
1. Click the Download link to retrieve and save the file.

You will need to download the file off the server and SAVE it to you local computer. You will not be able to access the file once it expires.

2. Choose "Save" to download the file and save into your local computer.

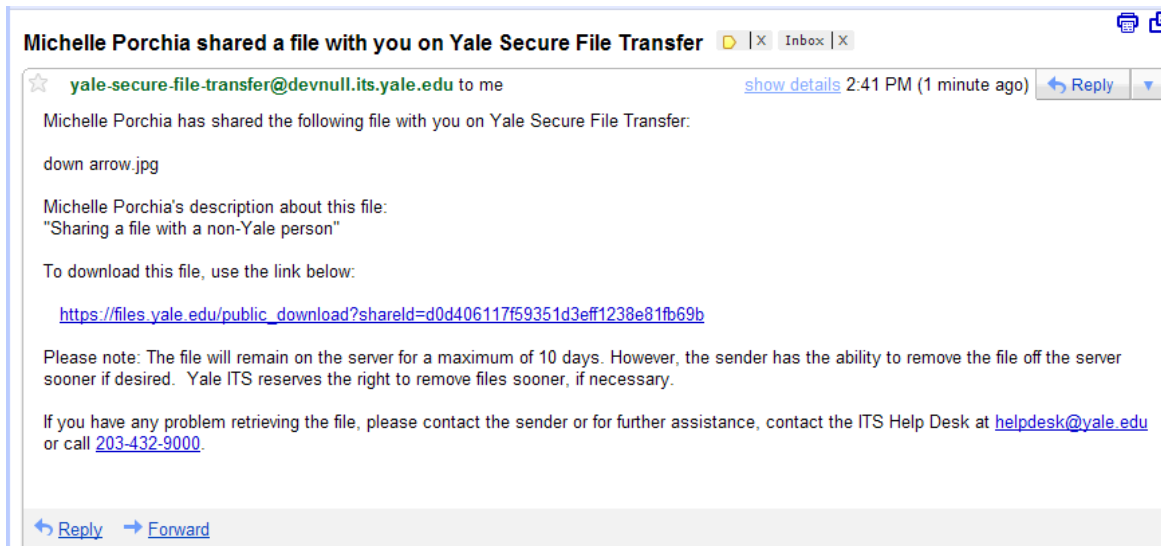


Note: You will receive the following message if you attempt click on the download link more than once unless you were provided a password for multiple downloads.

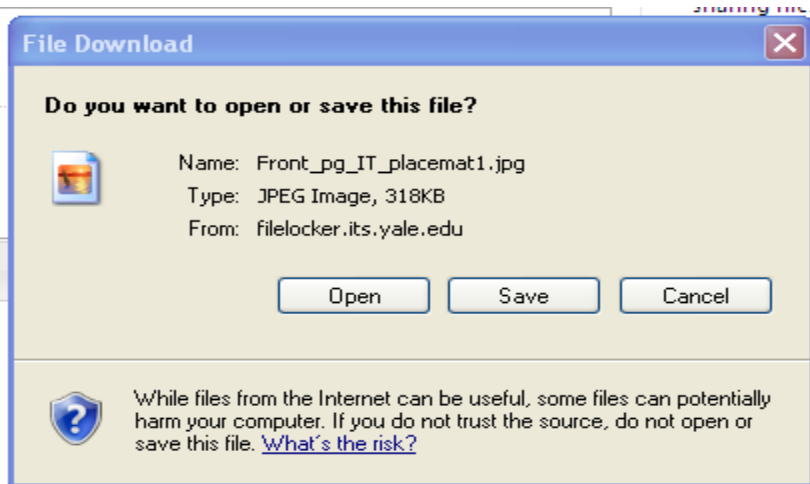


A Yale Department Email Address Receiving Shared Files

Files sent to Yale Department email addresses will receive a system-generated email From: yale-secure-file-transfer@devnull.its.yale.edu and with the Subject: *Yale Contact Name has shared a file with you on Yale Secure File Transfer.*



1. Click the Download link to retrieve
2. Click Save. This will download the file on to your local computer. You are only viewing the file If you do not save the file.



General Information - the Home Page

The following information is on the home page and is accessible to Yale Users only.

Expiration Dates

Each section will show the expiration date for each file. The default expiration date is 10 days after the date the file was uploaded. However, the sender has the ability to remove file(s) off the server sooner if desired. Yale ITS has the right to remove files if necessary.

The column titles **Name**, **Size** and **Expires** all allow the ability to sort with that category by clicking on the title.

My Files

[Upload](#) [Manage Groups](#) [Delete](#)

Uploaded Files

<input type="checkbox"/>	Name	Size	Expires	
<input type="checkbox"/>	Daffodils.jpg	3 kB	06/21/2011	▼
<input type="checkbox"/>	gromit.jpg	18 kB	06/22/2011	▼
<input type="checkbox"/>	lanainflwrs.jpg	144 kB	06/22/2011	▼

Files Shared with You (1)

<input type="checkbox"/>	Name	Size	Expires	
<input type="checkbox"/>	Blue hills.jpg	27 kB	06/22/2011	▼

Upload Requests (2)

Link	Single/Multi use	Virus Scan?	Expires	Actions
View Link	Single	Yes	06/22/2011	✖
View Link	Multi	Yes	06/22/2011	✖

Review of File Information Box

Uploaded Files

The screenshot shows a web interface for managing files. At the top, there are columns for 'Name', 'Size', and 'Expires'. Below this is a table of uploaded files:

<input type="checkbox"/>	Name	Size	Expires
<input checked="" type="checkbox"/>	PolicyChangeToolkitforBusinessOfficesApril292011.pdf	450 kB	06/15/2011
<input type="checkbox"/>	PolicyChangeToolkitforBusinessOfficesApril292011.pdf		
<input type="checkbox"/>	Yale Files - the secure file transfer servic... List.docx		

Below the table, there are sections for 'Files Shared with You (2)' and 'Upload Requests (0)'. The 'Files Shared with You' section lists two files: 'Front pg IT placemat1.jpg' and 'ITS24 Screenshots.zip'. The 'Upload Requests' section is currently empty.

On the right side, a detailed view for the selected file is shown. It includes a 'Public Share:' checkbox (highlighted with a red box), an 'ID:' field with the value '119', an 'Owner:' field with the value 'mp672', a 'Virus Scan:' status of 'Passed', an 'Uploaded:' timestamp of '2011-06-08 16:33:20', and a 'Notify Me on Download:' checkbox. There are also links for 'View Download Statistics', 'View File Notes', 'Download This File', and 'Delete This File'. A 'Share This File' button is located at the bottom of the detailed view.

ID: Is the file id number when a document is checked in to the system

Owner: is the NetID of the person sending the file

Virus Scan: Tells the file has passed the virus scan.

Uploaded: Date the file was uploaded

Delete This File: Permanently delete this file from the server. You can also delete a file using the Delete button at the top of the Home Page.

Download File: Provides a way to retrieve a file off the server.

View Download Statistics: View a chart of this file's download over time.

View File Notes: View the notes that are associated to the file, if the sender included a note.

Account Management Area:

History

This area allows you to view the log file within the Yale Secure File Transfer system. On the left side of the screen it displays the timestamp of the file, the action that was taken and the details describing the activity.

Timestamp	Action	Details
06/29/2011 15:25	Delete File	File Blue hills.jpg (ID:72) has expired and has been purged by the system.
06/29/2011 15:25	Delete File	File Yale Files Guide rev3.doc (ID:69) has expired and has been purged by the system.
06/29/2011 15:25	Delete File	File Water lilies.jpg (ID:61) has expired and has been purged by the system.
07/05/2011 09:23	Check In File	File Water lilies.jpg (266) checked in to Filelocker
07/05/2011 09:24	Create Private Share	File Water lilies.jpg shared with user vb248
07/05/2011 09:24	Sent Email	vamshi.bedhadi@yale.edu has been notified via email that you have shared a file with him or her.
07/05/2011 09:27	Check In File	File Beethoven's Symphony No. 9 (Scherzo).wma (267) checked in to Filelocker
07/05/2011 09:28	Create Private Share	File Beethoven's Symphony No. 9 (Scherzo).wma shared with user vb248
07/05/2011 09:28	Sent Email	vamshi.bedhadi@yale.edu has been notified via email that you

History

This area allows you to view all of your interactions with Yale Secure File Transfer. Below you can filter the results by action and/or date.

Filter Results

Action:

Start Date:

End Date:

You can also view your history with filters in place or by selecting a date range.

To return to the previous page, be sure to click on the “Back to Files” button.

Filter Results

Action:

All (hide logins) ▼

All

All (hide logins)

Install User

Login

Check In File

Create Private Share

Sent Email

Create Public Share

Delete Public Share

Create Upload Request

Delete Upload Request

Download File

Delete File

History		
Timestamp	Action	Details
06/10/2011 11:23	Install User	User Porchia, Michelle (mp672) installed
06/10/2011 11:59	Check In File	File Yale Files Guide rev.docx (7) checked in to Filelocker
06/10/2011 12:00	Create Public Share	File Yale Files Guide rev.docx (7) has been shared publicly
06/10/2011 14:52	Read Message (You)	You read message with subject "test of message within Yale Files "
06/10/2011 14:52	Read Message (You)	You read message with subject "test of message within Yale Files "
06/15/2011 10:20	Check In File	File Blue hills.jpg (16) checked in to Filelocker
06/15/2011 10:21	Check In File	File Water lilies.jpg (17) checked in to Filelocker
06/15/2011 10:21	Check In File	File Sunset.jpg (18) checked in to Filelocker

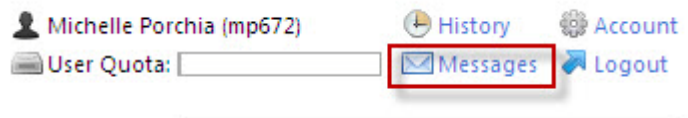
User Quota:

Hovering over the "User Quota" area will display how much space you have used and have remaining. The default User Quota amount is 10GB and there is a 2GB file size limit.

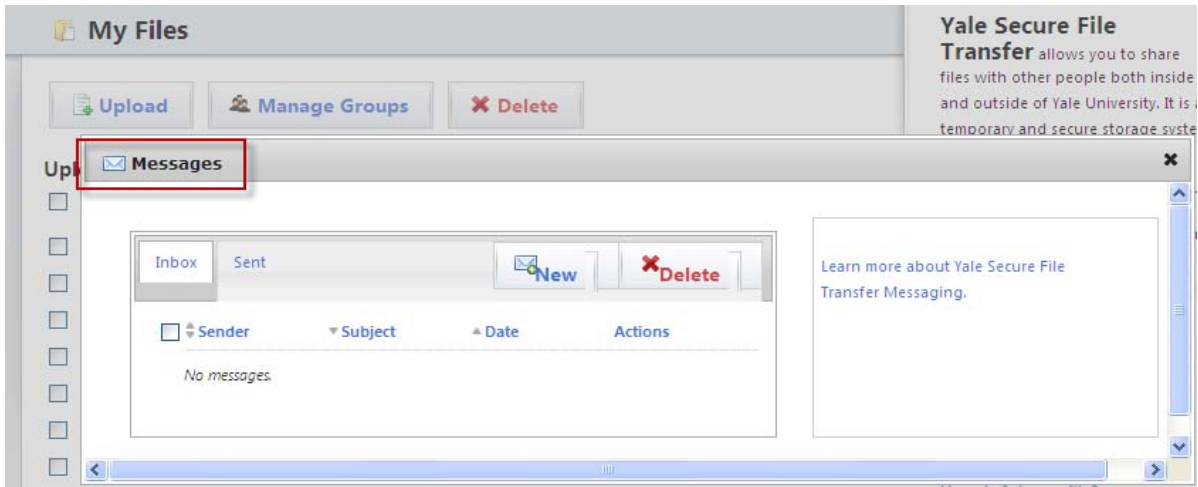


Messages

This messaging tool is only available when you are logged in to the Yale Secure File Transfer system. Click on the "Messages" link to send or receive messages



A box will appear allowing you to view messages in your in-box or sent box. Use the New button to create and send a message.



Account

This button is for advanced users only. Contact the HelpDesk if you have any questions.

