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The File Exchange Service



File Exchange Service – User Guide FES 2.0 Updated: 5th January 2009

Thank you for choosing the File Exchange Service to share your large files.

This document assumes you are the Administrator for the company and demonstrates how to roll out the package, as well as explain the technical functions.

You will first need to review the package to ensure you have the correct account limits and space limits for your company needs.

How it Works (An Overview)

Whenever you need to share a file; whether this be because it is too big for email or because you want a small project area to share with others, then the F.E.S is the right tool. You simply login with your pre-setup account and create a "share space". You invite 1 or 2 other contacts to this *space*, and the system automatically sets them up with their own logins and lets them know. You can then login to that *space* and upload your files (or perhaps ask your client to upload the file to you!). Once an upload is completed everybody in the *share space* is notified of the new file by email; so they may login and download at their convenience.

What is a BIG file?

There is no hard and fast rule to decide when you should use the File Exchange Service. Often you can send email attachments without realising how they might congest your Internet and servers further down the line.

A common occurrence is where a user is sending a large file to a client who has a small network connection. The result is the client's Internet connection could be disrupted all day.

Therefore any files over a few megabytes in size would be best served through the File Exchange Service, as it gives both parties control over **when** they upload the file or download (even overnight).

Discuss with your email administrator to suggest the company policy; who may also now be able to introduce better attachment limits to emails.

Is your package right for your company?

Sharing Accounts will be created and expire on an ongoing basis, and it would be difficult to device how many you require in a given month. We therefore limit your company by the amount of simultaneous accounts open at any given time. If you run your "sharing accounts" with short time periods (i.e. for sending a large attachment) you will require fewer accounts than if you want to use your space for several long lasting project areas.

You are also limited by file space, which is only freed up when you delete files or an account expires; so you need to ensure that your package has enough space to satisfy you largest expected files multiplied by the amount of simultaneous accounts you are likely to need. The total space is throughout all your accounts to make the service more flexible for you, rather than pre-allocated per account.

There are currently no limits on the amount of login accounts that are created, so you can add the whole company if you wish.

Roles and Permissions

An Administrator is the top level and has the ability to see, edit and delete all the share accounts and internal users setup within the company. This is intended for one of two responsible individuals at most.

A Superuser can create "Sharing Spaces" with their suppliers, colleagues or clients. However, *Superusers* can only view or delete their own accounts. These roles are intended for either a small selection of employees who need to use the service, or most users to prevent future administration issues: There is no preference to quantity; it is purely a control choice.

Normal users are those persons who have been setup/included in a *share space*. They will have access to *any share space* they have been invited into only. They can upload and download files; however they have no permission to delete files or *spaces*.

Getting Started

Step 1 - As an administrator there is not much to do...

You may already have a list of users you wish to get setup straight away to allow them to use the system themselves.

If so let's start by logging in at <http://www.fileexchangeservice.com>

Use your registered email address and password.

You will see a summary screen, ignore this and click on the **Manage Users** button.

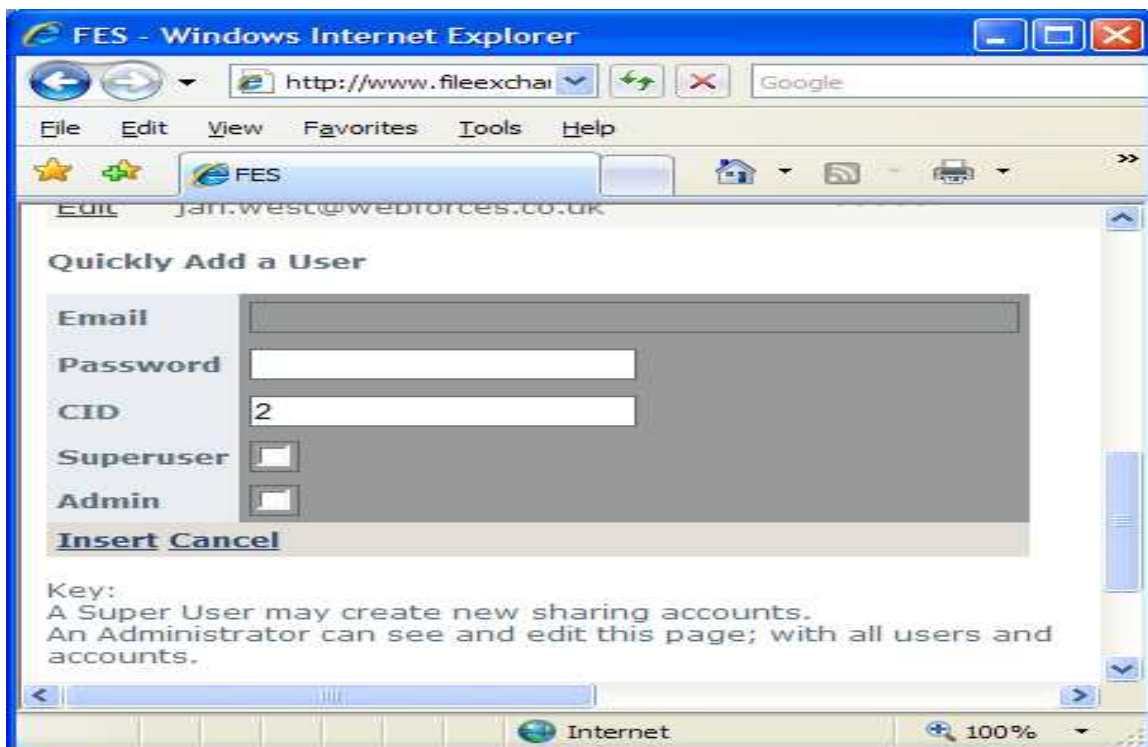
You are now in the Administration area. You can see FULL lists of accounts and users for your company (this is likely to be quite empty at the moment).

Scroll to the "Quickly add new users" section and you can directly enter an email address, password (ignore CID), etc.

Remember that they are going to create their own accounts they need to be **Superusers** (not administrators).

Emails will be sent out to all the new users, telling them they have a new account on F.E.S.

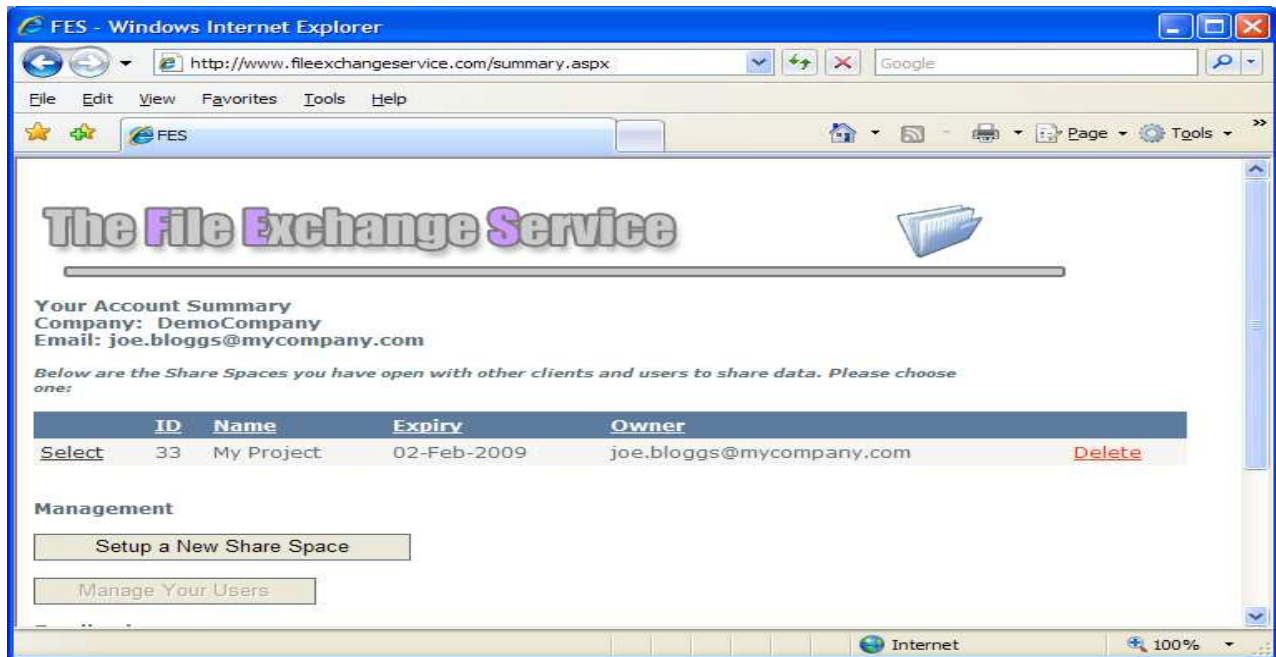
You may want to send them this user guide too.



The next step is really for 'Superusers', who want to create and share *spaces*.

Step 2 - Creating a Share Space

Login at <http://www.fileexchangeservice.com> using your email address and the password emailed to you. You will be presented with the summary screen; this is the central area, showing you all the shared spaces you own are associated with.



You may not yet have any accounts created, so let's click "Setup and New Share Space".

Start with a name for this "space", so you can identify it in your summary screen easily (keep it short though). Your email is already included, so you only need to enter the people you wish to invite to share these files. You do not need to actually include any more people, as you may be simply sending some files home; however for this example we will add two other invitees.

Enter the first email address and choose whether this is a "Company Colleague" or an "External Company". Enter the second email, similarly to the first; and choose it as a "Company Colleague" or an "External Company".

Now set an expiry period...

If this is a project area, do not set a time frame too small, as you do not want to expire early if a project is extended. Similarly, if it is just an email attachment or a "one shot" delivery, then keeping this expiry short will keep the system free for others to setup accounts later.

Finally, it is always nice to put a short message that will be emailed out the invitees to let them know what your intentions for this "share space" are.

Now simply click the "Create Account and Upload" button and you will be returned to the *Summary Area*.

An email will be sent to the invites to let them know how to get to the "share space".

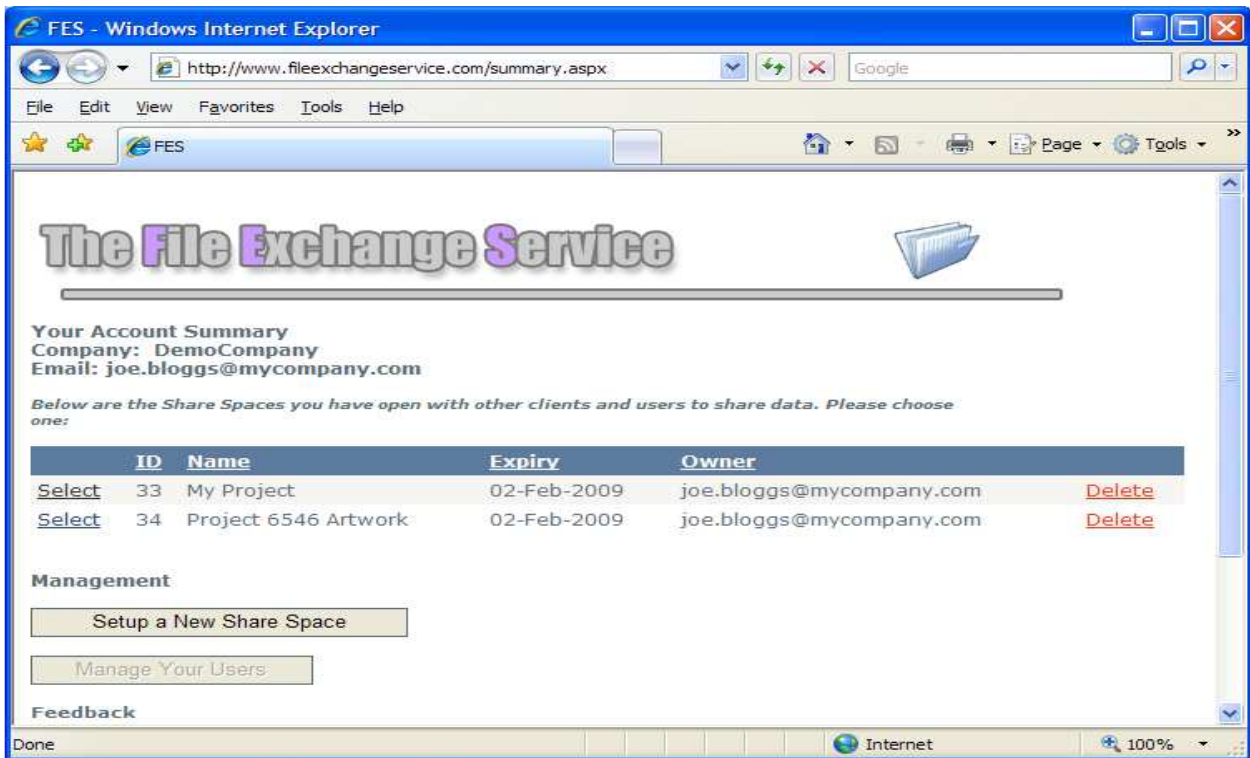
If you no longer require the "Share Space" you can simple click "delete" next to the space, and it will be removed. Only you and the administrator can do this.

The day before your account automatically expires; you will be emailed a reminder.



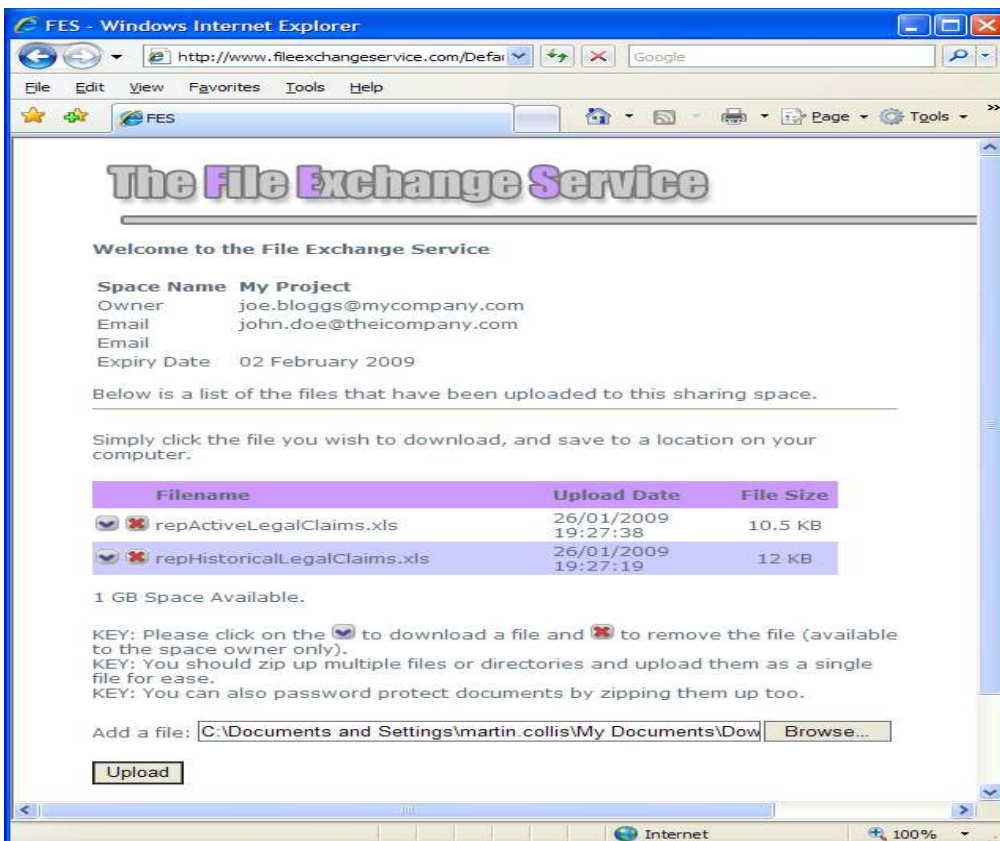
Step 3. For all users – accessing a “share space”

Once you have logged in at <http://www.fileexchangeservice.com> using the details you have been sent, you will be taken to the summary screen.



By clicking “select”, you can enter the chosen space.

The idea of a “share space” is for files to go both ways; however if you are the first to visit you may “find the cupboard bare”.



Uploading a file

Before you begin, check that there is enough space left to upload your file (See the **Space Available** caption). The number will be in Gigabytes (see comparison below). If you are not sure, and your file seems reasonably small, then you could take a chance. If the value is negative, then contact the owner of the "share space", as they will need to free up or acquire more.

Often you can hover your mouse pointer over a file and it will tell you the size.

A Gigabyte is roughly 1000 Megabytes or a 100,000 Kilobytes.

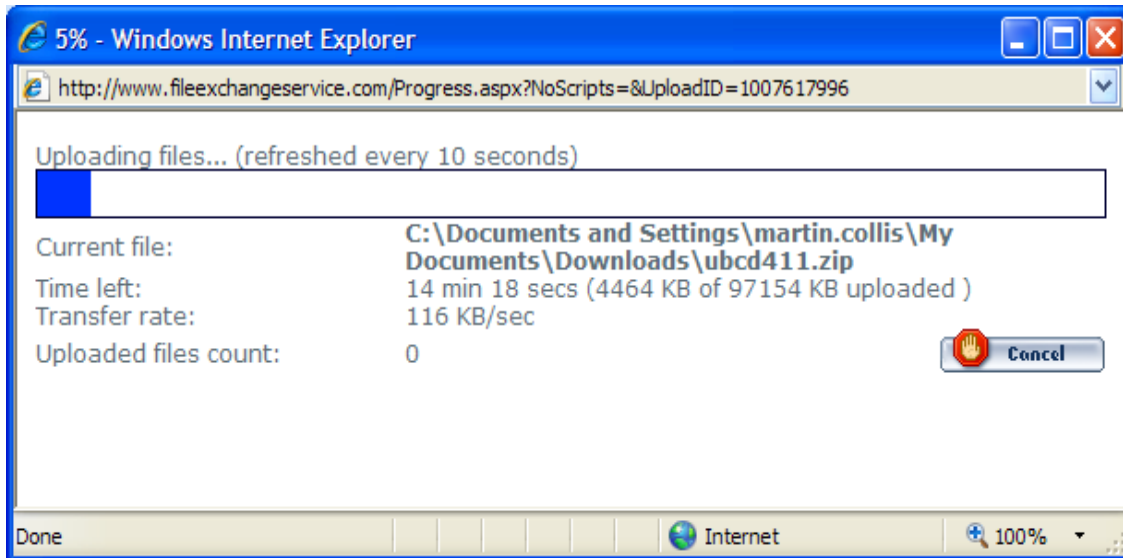
Most office files tend to be around 500K up to 3 Megabytes.

Artwork and modelling work can range from 10 Megabytes up to a Gigabyte (1000 Megabytes).

Once you are happy, simply click the "Browse" button and you will receive a popup window to find your file(s). This window is part of your own system (E.g. OS X or Windows) and you will need to refer to the computer manual for how to navigate through it.

Once you have found your file, simply double click it and click "open"; and the path will be placed in the "Add a file" textbox.

Now click the "Upload" button and you will be presented with an "upload progress" window.



You can see how long an upload will take, and get on with other tasks. The progress window refreshes every 10 seconds and also shows the file being uploaded.

At the end of the upload, you are returned to the "Share Space", displaying your uploaded file, with a file size and a "date and time".

Upload Troubleshooting

Uploads depend on a number of criteria on your local machine; and most PCs already are prepared. However there are a number of possible situations that may affect your upload:

If you do not see the progress window, this may be due to Java script being switched off on your browser. Uploads will often work anyway, however no ETA can be provided.

The browser screen shows error messages or finishes with no upload shown. This may be due to some firewalls or antivirus measures on your computer or network. Speak to your network administrator to assistance.

Clicking of progress window can occur if you have sound on button presses, this is nothing to worry about and turning your sound down for long uploads may be preferred.


Uploading multiple files or whole folders

We recommend that you use a ZIP application to group all the files/directories into a single file. This makes it easier to upload and more robust.


Most zip packages are either native to your system or free to use and most also allow you to encrypt files for security too.

Important: If you upload the same filename it will replace the file already uploaded, this is a way to always have the latest version of a file, so bare this in mind when you upload.

Downloading a file

Downloading a file is very simple indeed. You simply click the small "down arrow-ed" icon  and choose a location to save your file. You will get your native browser download progress bar to indicate how long the download will take. You can also download multiple files at once.

Deleting Files

If you are the owner of the "space", you can remove a file at any time by click the cross icon .

Deleting "Share Spaces"

From the summary screen, you can remove complete "share spaces" by selecting delete, but be careful as this is a one way process.

Important: Remember that this is an online temporary share space, always ensure you have local copies of everything you upload, and if you are sending very sensitive information, we recommend you encrypt the files before you upload.

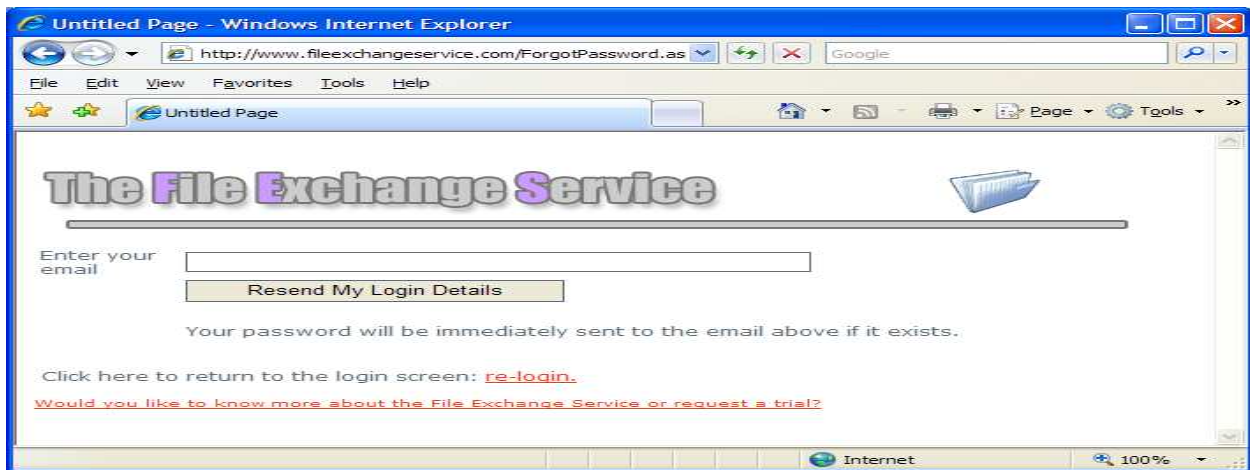
Login Page

You can return to the login screen at any point with the re-login option at the bottom of **every** page. Useful if you wish to change the user who is logged in.

Forgotten Password

As administrator, you can change any password you have setup for internal employees (however not external as the may share other accounts). This can be done by simply going to the Manage Users area, finding the user in the users list and clicking edit. Here you can change the password as you like. Finish by clicking "Update", or "Cancel" to abort.

A **simpler way** is for the user to go to the login page and click the "forget password" link, enter their email address and password will be sent immediately to them.



Further Administration

The administration area displays a number of things for you to manage or edit.

Firstly the summary table will show you a total of the concurrent accounts still active, along with the maximum paid for in your package.

There will also be a summary of the total space used by all the company's "share spaces", with a maximum paid for as well.

If the summary sections contain red text, this indicates you are close or over you limit and you need to action a clean-out or amend your package accordingly.

Important: All the delete options that follow will perform an immediate deletion of that user or share space, so caution should be exercised.

You can delete any current live account you wish, as well as view when they expire and who owns them.

The users section is very powerful, as you can alter passwords, and also boost a user up to a 'superuser' or even another administrator if you wish.

Lastly, thank you for choosing the File Exchange Service for your file sharing needs...