

SecureDrawer by eFileCabinet

User Manual

SecureDrawer Orientation

User Manual

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SecureDrawer

Creating and Managing Guest Users

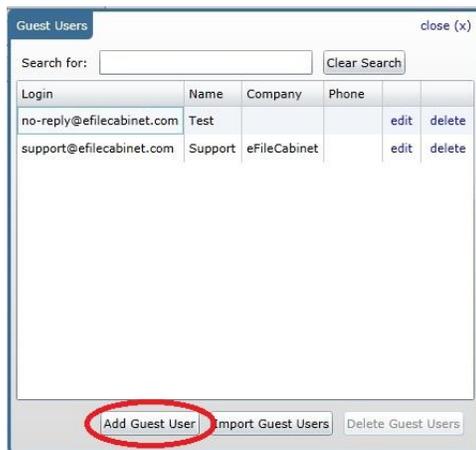
- Go to the Admin tab on the right hand corner of the screen.



- Click the 'Guest Users' button.



- Go to the bottom of the pop up window and select 'Add Guest User'.



- Assign Drawer Permissions.
 - Notify - When this is checked the guest user will receive emails when files are uploaded their account.
 - Upload - When this is checked the guest user can upload files.
 - Delete - When this is checked the guest user can delete files that are in their drawer.
- Select the Add Another button to continue adding users.

- Select the Complete button when you have finished adding your guest users.

Note: When adding information, be sure to include any item you want to search by such as phone number, name and company name.

Adding Guest Users from a CSV file

If you have a CSV file of the Guest Users you would like to add to your account, you can easily import them into SecureDrawer.

In the Guest Users window, select the 'Import Guest Users' icon. Choose the CSV file containing your list and click Open. Enter the Guest User details and select "Import" then "loading message" will come up when complete loading message will show all the added Guest Users.

Uploading Files

- Make sure the Drawers tab is selected on the right side of the screen.
- Click the 'Home' tab on the top.
- Click the 'Upload' button on the left side.



- * Select the file you would like to upload.
- The File Upload window will appear. Here you can add notes, retention dates or a password for each file.
- If you have assigned the Notify Permission to the guest user, the guest user will receive an email notifying them that the file is available.

Note The status of the upload will appear on the bottom of your screen.

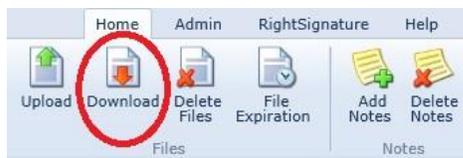
Downloading Files

- In the Drawers option, select the Drawer or Folder that has the file you want to download from the left window.
- This should bring up the files that are in that drawer or folder on the left.
- Click the 'Download' button to begin downloading



Downloading All Files in a Drawer

- Select the drawer that you want to download everything from.
- On the Home tab, click the 'Download' button at the top.



- This will prompt you to save a .zip file. This contains all the data in that drawer.

Drawers

Drawers allow you to share files between users. You can also share drawers with multiple users so you only need to upload the document once.

Creating Drawer

- Click on the 'Add Drawer' button on the top menu bar.



- Name the drawer and click 'add'.
- This will create a new drawer.

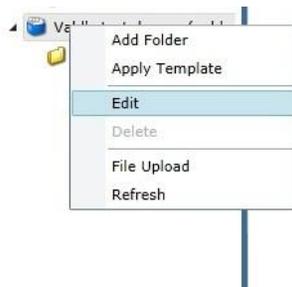
Deleting a Drawer

- In the Admin tab, highlight the drawer you wish to delete and click "Delete Drawer".

Note: If you have accidentally deleted a drawer, you can recover it by going to the Recycle Bin.

Editing a Drawer

- Highlight the drawer and click 'edit drawer'.
- Alternatively, you can right-click the drawer and select 'edit'.



Sharing a Drawer

- Select the drawer that you wish to share with the user.
- Click the 'Edit Permissions' button on the admin tab.
- From here, check mark the user/guest user you wish to have access to the drawer. Use the check-boxes along the side of the window for selecting all guest users and assigning permissions to all guest users. You can also give them permission to allow the user to write or delete anything in that drawer. Additionally, you can modify if you want a notice to be sent to the user anytime you put something in the drawer here.

Edit Permissions close (x)

Search for:

Member All Write All Delete All Notify All

Member	Login	fullName	companyName	Permissions
<input type="checkbox"/>	support@efc.com	support@efc.com		<input type="checkbox"/> Write <input type="checkbox"/> Delete <input type="checkbox"/> Notify
<input type="checkbox"/>	support@efilecabinet.com	Support		<input type="checkbox"/> Write <input type="checkbox"/> Delete <input type="checkbox"/> Notify

- Select Save.
- After a guest user has been given access to a Shared Drawer, it will be listed as an available drawer the next time they login.

Account Admins

Admin accounts are able to view multiple guest users and can be assigned to manage a subset of guest users.

Creating Admin Accounts

- Click on the Account Admins tab on the top menu bar.
- Select the Admin Users icon in the middle of the bar.



- Click the 'Add Admin User' button on the bottom right hand corner of the pop up window. This should bring up another pop up window where you can put the Admin information in.

Add Admin User close (x)

Login (email)

Full Name

Manually Set Password

Password

Confirm Password

Permissions

Root (Access admin users, user groups, and tools)

All Drawers (Access to all drawers)

All Guest Users (Access to all guest users)

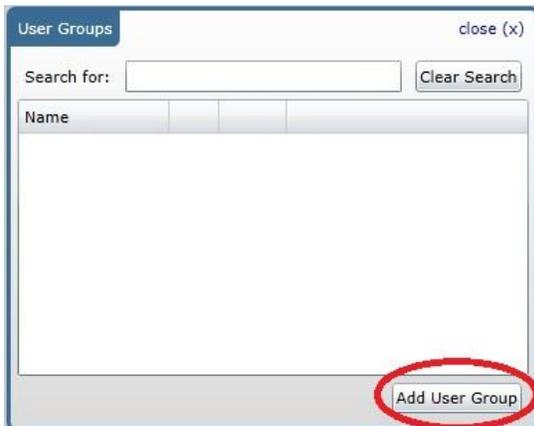
- If you need to edit the Admin information at any point, you can click on the Admin Users button and click 'edit' the the right side of the account you wish to edit.
- To delete an Account Admin, simply select the 'delete' button.

User Groups

User Groups allows you to divide your users into groups so you can easily manage the files you send to them.

Creating User Groups

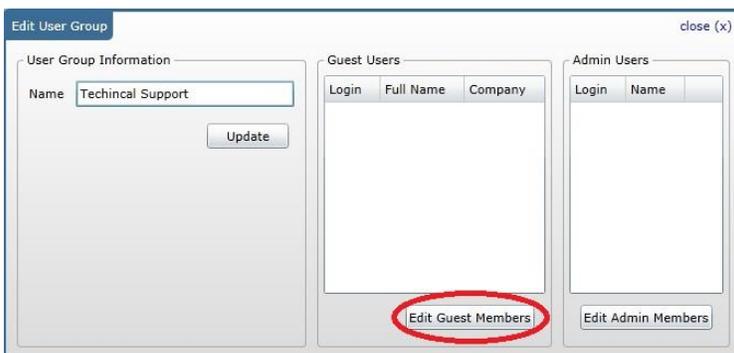
- Click on the User Groups button on the Admin tab.
- Click the 'Add User Group' button on the bottom left hand corner of the pop up window.



- Enter the name for the new User Group and click 'Add'.

Adding and Removing Users to User Groups

- In the User Group window, click on the 'edit' option that is next to the user group you wish to modify.
- In this window, you can rename the group, add guest users, or admins to the group.
- To add guest users, click the 'Edit Guest Members' button.



- It should bring up a window called Edit User Group Guests with all of your guest users. To add a guest user, click on the check mark box next to the user name.

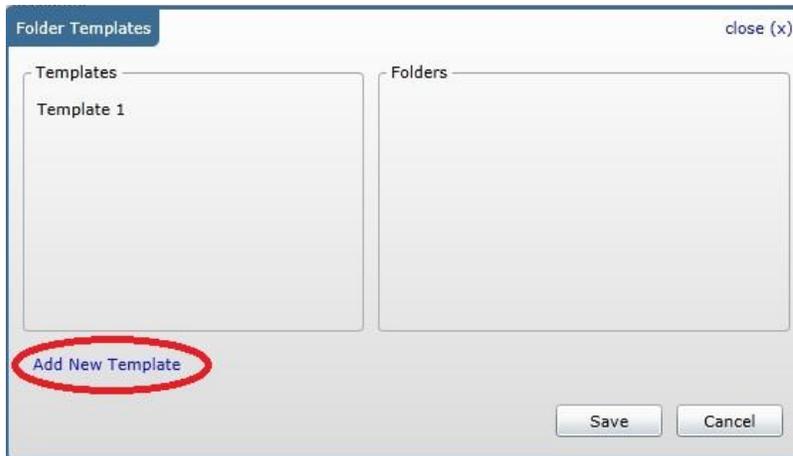
- To remove a guest user from a group, uncheck their name in the Edit User Group Guests window.
- To add Admin users, follow the same steps above, except click the 'Edit Admin Members' button instead.

Note: Administrators can be limited to view the group that they are attached to. If you have separate departments within your company, you can purchase one SecureDrawer account, create admins for the different departments, create groups for each department and then put your users in their department group.

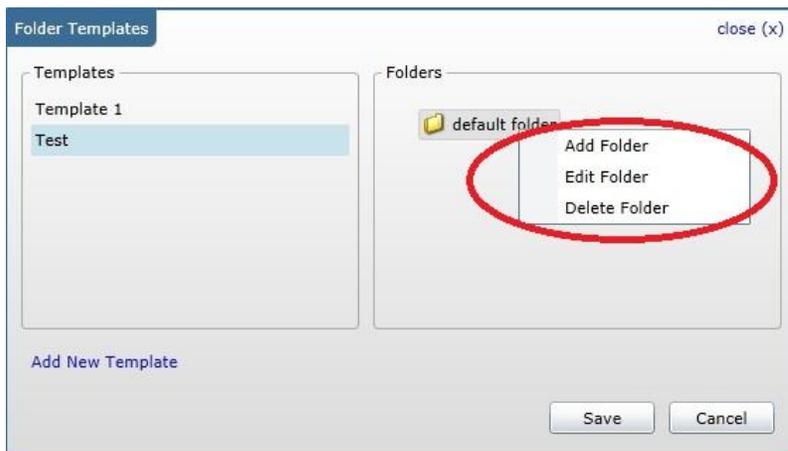
Tools

Folder Templates:

- You can create templates for your drawers by clicking the 'Folder Templates' button under the Admin tab.
- When you click the button, it will bring up a menu. To create a new template, simply click the 'Add New Template' button on the bottom left of the page.



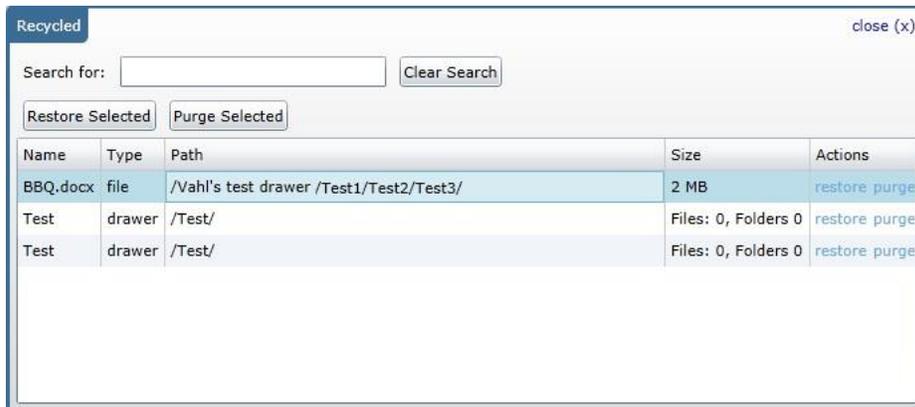
- Name your template and click 'Save'.
- This will create a new template. You will see the folders of the template on the right. There will be a default folder in your template.
- To modify the folders, simply highlight the folder, then right click it and select what you want to modify it. You have the option to add a folder, edit the folder, or delete the folder.



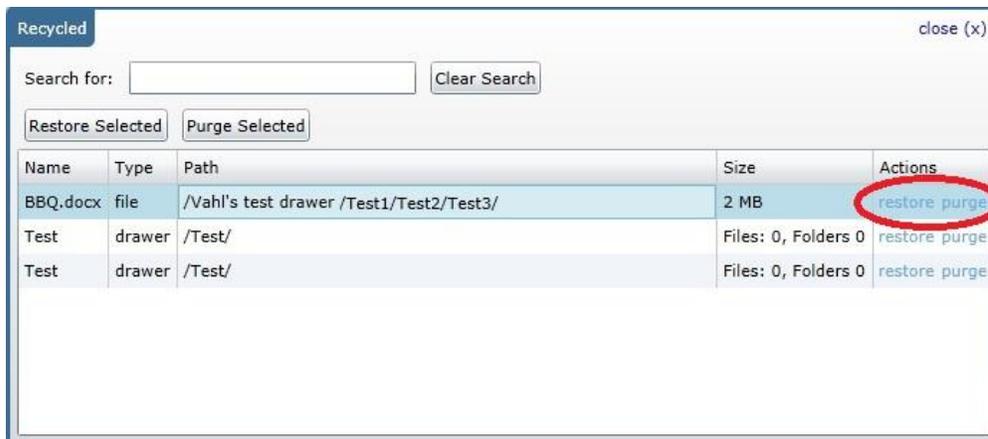
Recycle Bin

If you delete a folder or document, it will go to the Recycle Bin. The recycle bin is there in case you need to restore the document. Keep in mind that documents in the Recycle Bin are part of the maximum file storage use you purchased. You may purge items in the Recycle Bin to permanently delete them from SecureDrawer and to free up some space.

- The Recycle Bin is located on the Admin tab under the Tools section.
- Here, you will see the document or folder in the recycle bin, the path to the item, the size of the item, and options to restore or purge the item.



- You can restore or purge items by selecting the item, then clicking 'restore' or 'purge'



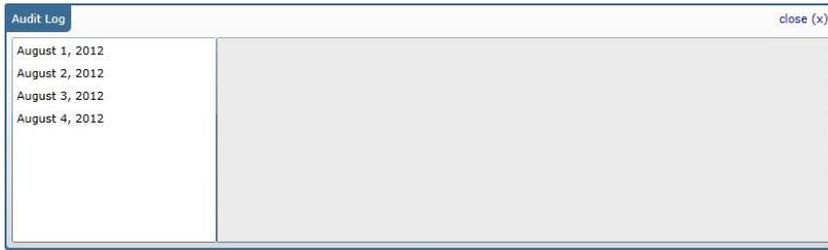
- You can delete or restore several items at once by highlighting the items, then selecting 'Restore Selected' or 'Purge Selected'.

Note: Items that can be deleted and restored are files, folders, and drawers.

Audit Logs

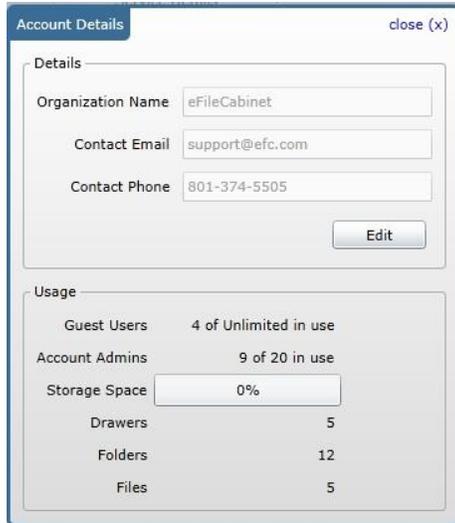
The Audit Logs allows you to check to see when files were uploaded, downloaded or deleted. Every action is logged and tracked so you can see when items were modified. To view the

Audit Logs, click on the 'Audit Logs' button under the Admin tab. Then, select the date that you wish to view.



Account Details

The Account Details button shows you information on your account, such as the email associated with the account, the phone number, how much storage space you have used, how many drawers, how many guest users, and how many account admins.



Usage	
Guest Users	4 of Unlimited in use
Account Admins	9 of 20 in use
Storage Space	0%
Drawers	5
Folders	12
Files	5

How to Update your Account



Watch this video to learn how to use Update Your Account.

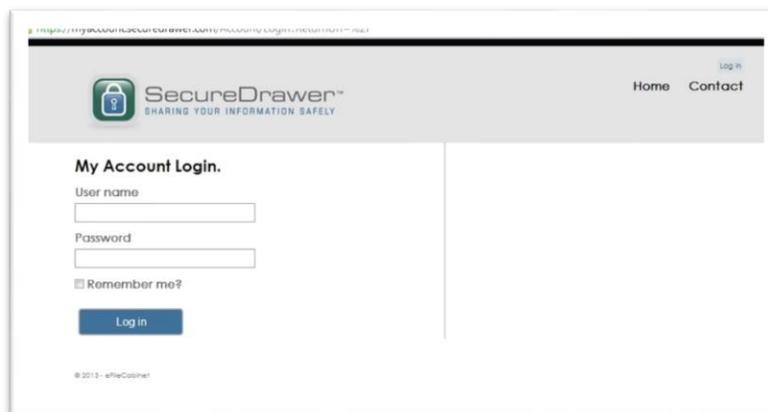
Or if you prefer, read the step-by-step instructions below.

MyAccount:

The MyAccount link is where you can login to see the information related to your current plan, such as the SecureDrawer service you are subscribed to, your credit card information, and how to cancel your SecureDrawer account.



After clicking on MyAccount a login window will appear.



My Account Login.

User name

Password

Remember me?

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After logging in the Welcome to My Account window will open.



Update Account Details:

- To update your account details, click on the "Account: Details" link in the "Welcome to My Account" menu.
- This will open up a menu where you can see the details of your SecureDrawer Account. Update those details by clicking on the "Edit" button on the lower left-hand corner of the screen.

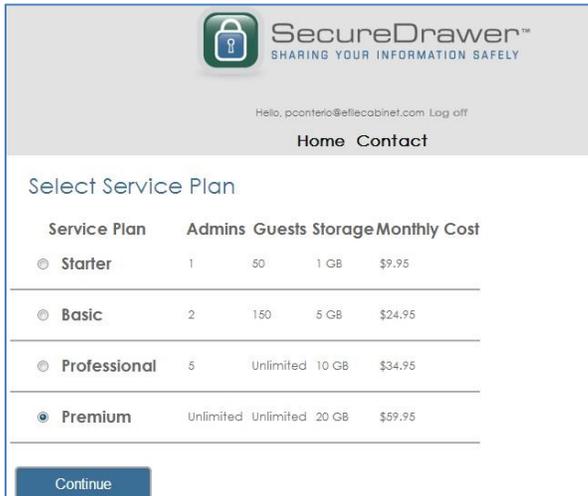


Update Service Plan:

- To update your service plan, click on the 'Update Service Plan' button in the Service Plan Menu.
- This will open up a menu where you can see the upgrades to SecureDrawer, how much they cost, if you are subscribed to Overdraft, and which plan you are on.

Note: Overdraft allows you to continue to upload files even if your account limit has been reached.

Each time you go over your limit, your card will be charge a set overdraft fee of \$10.00 per 2 Gigabytes.



SecureDrawer™
SHARING YOUR INFORMATION SAFELY

Hello, pconterio@efilecabinet.com Log off

Home Contact

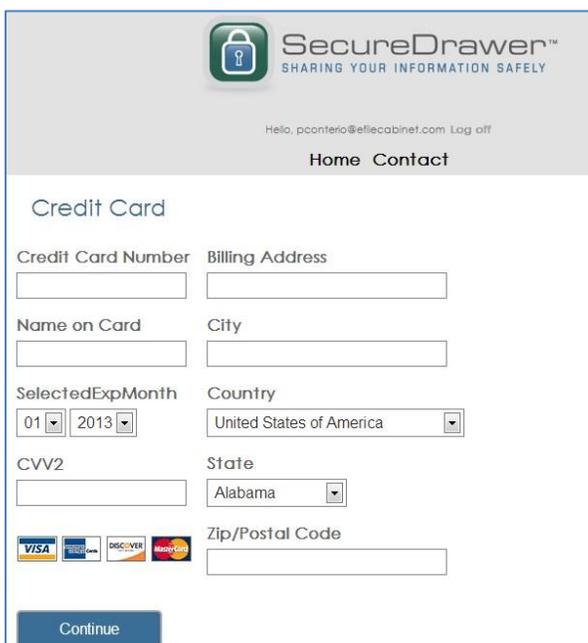
Select Service Plan

Service Plan	Admins	Guests	Storage	Monthly Cost
<input type="radio"/> Starter	1	50	1 GB	\$9.95
<input type="radio"/> Basic	2	150	5 GB	\$24.95
<input type="radio"/> Professional	5	Unlimited	10 GB	\$34.95
<input checked="" type="radio"/> Premium	Unlimited	Unlimited	20 GB	\$59.95

Continue

Update Billing:

- To update your billing credit card, in the Admin tab, click the "Service Plan" button.
- This will bring up a menu where you can modify your credit card details.
- Once you are finished modifying the details, click 'Update'.



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Hello, pconterio@efilecabinet.com Log off

Home Contact

Credit Card

Credit Card Number Billing Address

Name on Card City

Selected Exp Month: 01 | 2013 Country: United States of America

CVV2 State: Alabama





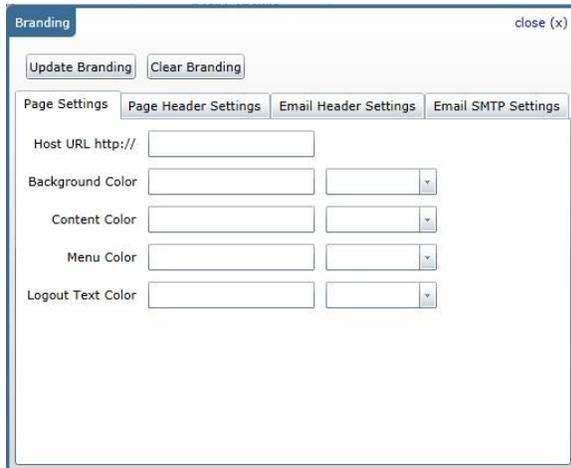
 Zip/Postal Code

Continue

Branding

Branding allows you to change the entire look and feel of SecureDrawer. You can match it to your own Website or create your own custom look and feel.

To access Branding, click on the Branding button in the Admin tab.



Customizable Options

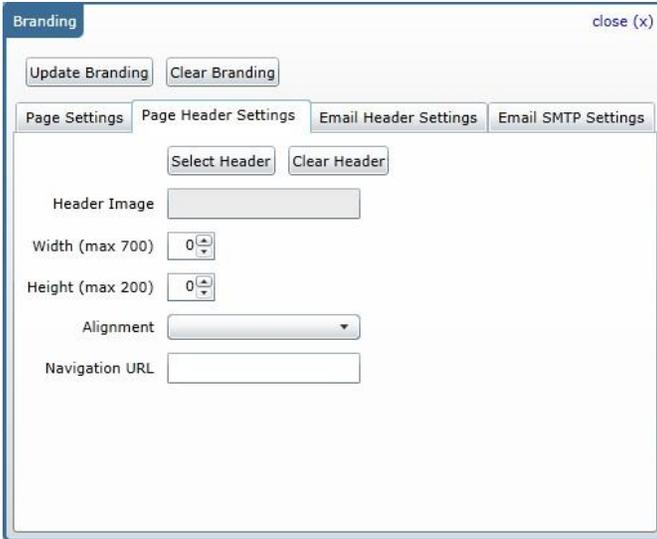
Page Settings:

You can either type in your desired color code or use the selector to select your desired color.

- Background Color
- Content Color
- Menu Color
- Logout Text Color

Page Header Settings:

The header is the image across the top of the page. You can upload any image you would like by clicking the 'Select Header' button. You can also customize the link the user is sent to if they click on the header by inputting a Navigation URL. Be sure to enter a Width and Height for the header to appear.



Branding close (x)

Update Branding Clear Branding

Page Settings Page Header Settings **Email Header Settings** Email SMTP Settings

Select Header Clear Header

Header Image

Width (max 700)

Height (max 200)

Alignment

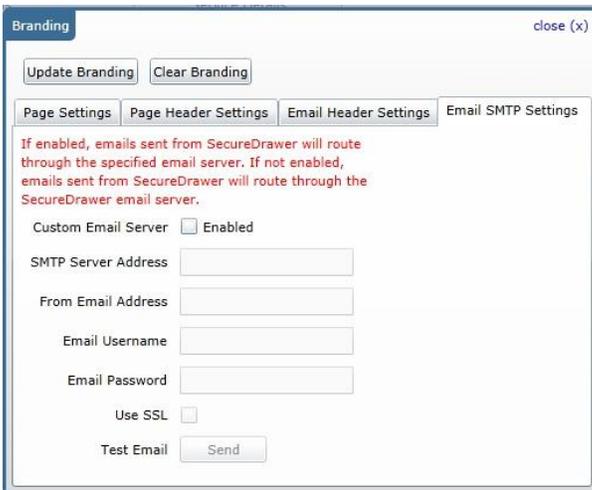
Navigation URL

Email Header Settings: You can customize the SecureDrawer notification emails going out to your clients by adding your own Header Image and the Navigation URL for that image.

Email SMTP Settings:

With this feature, you will be able to send out SecureDrawer notification emails from an email address of your choosing. If not enabled, the recipients notification will be sent by no-reply@securedrawer.com

Under Email SMTP Settings, select the box next to Enabled. Enter your email server details.



Branding close (x)

Update Branding Clear Branding

Page Settings Page Header Settings Email Header Settings **Email SMTP Settings**

If enabled, emails sent from SecureDrawer will route through the specified email server. If not enabled, emails sent from SecureDrawer will route through the SecureDrawer email server.

Custom Email Server Enabled

SMTP Server Address

From Email Address

Email Username

Email Password

Use SSL

Test Email

Example:

If you have a Gmail account, you would enter the SMTP Server Address as: smtp.gmail.com
 The From Email Address and Email Username are your complete email address:

example@gmail.com The Email Password is the password linked to your Gmail account. Click the Test button to send a test email to your admin account.

Custom Login

Use the following HTML code to embed a login to SecureDrawer on your Website. Be sure to place it on a https portion of your Website so that the password is encrypted.

Code

```
<html xmlns="http://www.w3.org/1999/xhtml"> <head>
```

```
<title></title>
```

```
</head> <body>
```

```
<form method="post" target="_blank"
action="https://SecureDrawer.com/HtmlLogin.aspx">
```

```
<table>
```

```
<tr>
```

```
<td>
```

```
Login:
```

```
</td>
```

```
<td>
```

```
<input id="login" name="login" />
```

```
</td>
```

```
</tr>
```

```
<tr>
```

```
<td>
```

```
Password:
```

```
</td>
```

```
<td>
```

```
<input id="password" name="password" type="password" />
```

```
</td>
```

```
</tr>
```

```
<tr>
```

```
<td>
</td>
<td>
  <input id="save" name="save" type="checkbox" />
  Keep me signed in
</td>
</tr>
</table>
<input type="submit" value="Login" />
</form>
</body> </html>
```