Enable and Configure the Send and Reply Portals

THE INFORMATION IN THIS ARTICLE APPLIES TO:

• EFT v8.0 and later

DISCUSSION

Before users can send files using Workspaces, you must first configure the Send portal in EFT.

To enable Workspaces for sending files

1. In the administration interface, connect to EFT and click the Server tab.
2. On the **Server** tab, click the Site you want to configure.
3. In the right pane, click the **Web** tab.
4. **Send Portal, click Configure. The File send dialog box appears.**
5. Select the **Enable secure file sending** check box. This requires the HTTPS port to be configured and available.
6. Under **Authorized users can send files to**, select one of the following options:
    • **Existing EFT users only (most restrictive)** - Allows EFT users to send files via Workspaces for Outlook only to other users with an EFT account.
    • **Existing EFT user and registered guest accounts** - Allows EFT users to send files via Workspaces for Outlook to other EFT user accounts and registered guest accounts.
    • **Existing EFT users, registered guest accounts, and anonymous users** Allows EFT users to send files via Workspaces for Outlook to other EFT user accounts, registered guest accounts, and non-EFT user accounts. Non-EFT user accounts do not require credentials, making it easy for the recipient to pick up files, but makes the system less secure. To reduce this risk, the sender can set **Retain files even after link expiration** for O days.
7. To limit sending invitations to certain domains, select the **Allow invitations only to these domains** check box, then specify the domains, separated by commas.
8. To prevent sending invitations to certain domains, select the **Don't allow invitations to the following domains**, then specify the domains, separated by commas.
9. In the **Send portal reserved path** box, specify the path for the **Send** portal. The default is **/send**.
10. In the **Hostname:port** box, specify the URL for file pick up. By default, this box will contain the same IP as the Domain box on the **Site > Connections** tab, but you can change it to an external-facing hostname, if needed (and if so configured in your

network). Links that are sent for Workspaces invitations and file sharing will have this URL.

11. For using the Outlook deployment script or Add-In installer, refer to "Deploy Outlook Add-In on End-User's Computers" in the online help for your version of EFT.

12. To require the use of Outlook for large files, select the **Auto-attach files in Outlook when they exceed** check box, and then specify a size.

13. Specify the **maximum expiration period for pickup links**. The default is 1 month.

14. Specify the length of time to **Retain files after link expiration**. The default is 0 days.

   • This value indicates the length of time between Workspace expiration and file removal, and cannot exceed **maximum expiration period**, above. On expiration, a "Workspace expired" Event is triggered and the Workspace becomes invisible to the administrator, owner, and participants, but the directory and files remain alive. At the end of the retention period, a "Workspace removed" Event is triggered, the Workspace information is wiped from EFT configuration, and the directory is physically removed from the file system. For example, if a transactional (guest user) Workspace is created to expire in 10 days and retain file for 10 days, if the Workspace expired on October 1, it will then be removed from disk on October 11.

15. Select the **Allow recipients to reply with files of their own** check box to allow people to whom you've sent files to reply with files of their own. Then you must enable the "Request file page" to specify the **Reply** path.

16. Next to **Send entire message (not just attachment) securely**, click the **Sender chooses** drop-down list and click an option of how to send: **Always secure**, **Never secure**, or **Sender chooses**.

17. For anonymous recipients, next to **Out-of-band passcode for anonymous pick up**, specify whether a recipient requires a passcode to pick up files. Click the drop-down list and then click **Required** (sender must require a passcode), **Not required** (sender does not have to require a passcode), or **Sender chooses** (whether to require a passcode). (The sender's authentication options appear in the **Options** dialog in Workspaces.) When an out-of-band passcode is required, the passcode will appear for the sender after the message is sent. The sender then must provide the recipient the passcode via a non-Workspaces method (for example, phone, email, SMS, or message app).

18. Next to **2nd factor method for account verification**, click the list to choose one of the methods of delivery for the OTP:

19. Click **OK**, then click **Apply** on the **Web** tab.

For more details and information on this, please refer to the [online help](#) for your version of eft with the title "Enable and Configure the Send and Reply Portals".

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