



Enterprise Feedback Suite

EFS Secure Exchange

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Germany

QuestBack GmbH
Gustav-Heinemann-Ufer 72a
50968 Cologne

Norway (Head office)

QuestBack AS
Løvenskiolds gate 26
0260 Oslo

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1 EFS Secure Exchange

EFS Secure Exchange is an optionally available add-on tool that facilitates the exchange of data between persons working together on an EFS survey:

- It allows various data required for conducting a survey, such as questionnaire drafts, lists of participants, checklists, and schedules, to be directly stored in and downloaded from the central EFS admin area. This facilitates the cooperation in large teams, between project participants in different locations, or between QuestBack customer and QuestBack project manager.
- You may upload files of any format, except for PHP and HTML. The maximum possible file size of the respective installation is displayed in the import dialog.
- Sensitive data are stored in the controlled-access admin area where they can be viewed and downloaded by authorized users only. Additionally, they can also be protected by password or completely blocked against modification or download. Unprotected data traffic via regular e-mail or complex encoding procedures are no longer necessary.
- There is a separate login for EFS Secure Exchange, usually located at <http://www.your-domain.com/fm/>. This will take you to an area entirely separated from the admin area, containing only the exchange files. By assigning the relevant rights you can determine which user teams are allowed to work in the admin area and which teams may use the separate login only.
- The management of access rights to stored files is based on the familiar EFS rights system.
- If data have to be frequently updated, assigning file statuses such as “active” or “obsolete” will help you keep track.
- All changes are documented in a history log. This allows you to keep tabs on who has uploaded, downloaded or deleted files from the server.

The following chapter explains how data exchange is performed using EFS Secure Exchange. After that, Chapter 3, *S. 12* explains how a project manager prepares the exchange process for the team members, i.e. how to create exchange teams, assign user teams, and configure their rights.



This manual describes the features of EFS Secure Exchange in version EFS 10.2. Depending on the version of the EFS installation you are using, the documentation of certain features may differ slightly.

2 Exchanging Files

Depending on which access rights you have been assigned by the project manager, there are different ways to access the exchange platform:

- If you are authorized to access the admin area of EFS, you will find the exchange platform in the **Options->File exchange** menu.
- If you are merely authorized to access EFS Secure Exchange, log in at <http://www.your-domain.com/fm/>.

Figure 2.1 Separate login for EFS Secure Exchange



The **File exchange** menu will only be displayed in the admin area if you are already a member of an existing exchange team. If you do not see the menu item although you should already be on a team, please contact the responsible project manager or QuestBack Support.

2.1 The Overview of Files

After logging in at <http://www.your-domain.com/fm/> or opening the **File exchange** menu, you will be directed to an overview of the files of all exchange teams for which you have at least read rights.

The already familiar EFS search functions allow to handle extensive file lists easily.

- Simple search: You can enter a term or part of a term. The fields “Title”, “File name”, “Comment”, and “Author” will be searched.
- Extended search: In addition to the keyword search you can specify status or team or narrow down the period in which the file was uploaded.

The **View** function for restricting the table is also available.

Overview of files

Search

Search text Search [Extended search](#)

Entries found:

[» Upload new file](#)

[» View](#)

>1<

Actions: ▾

Date	Title	Comment	File name	Size	Author	Security	Status	Team name	Selection
2008-11-11	List	Participant list	participant_list.xls	4,5 KB	John Doe	Password: <input type="text"/>	Active	testcompany_staff	<input type="checkbox"/>
2008-11-11	Statistics	Project Statistics	statistics.doc	1,4 MB	Mary Test	Password: <input type="text"/>	Active	testcompany_staff	<input type="checkbox"/>
2008-11-11	Project	Copy of last year's project	project.gpx	449,2 KB	John Doe	No password given.	Active	testcompany_staff	<input type="checkbox"/>

Apply to the files shown above

Apply to all matching these criteria.

[Execute](#)

Figure 2.2 Overview of files

The following table explains the contents of the overview list in detail:

Column heading	Meaning
Date	Date when file was stored on server.
Title	User-defined file identification within the exchange platform.
Comment	Explanatory comment.
File name	Actual file identification, such as example.doc.
Size	File size. If the file is smaller than 1.024 KB, the size is stated in kilobytes, otherwise in megabytes. If the file is smaller than 1.024 bytes, the size is stated in bytes.
Author	The staff member who uploaded the file.
Security	If a password has been set when uploading the file, this field contains an input field where you have to enter the password before downloading the file.
Status	Indication of status. Possible values: "Active", "Obsolete", "Locked". See Table 2.2.
Team name	Name of staff team possessing full rights to the file.

Table 2.1 Contents of the file list

2.2 Uploading a New File

You may upload files of any format, except for PHP and HTML. The maximum possible file size of the respective installation is displayed in the import dialog. Please note that the name of the file you want to upload has to be unique; i.e. if test.doc already exists, you cannot upload a second file named test.doc.

1. Click on the **Upload new file** button in the **File exchange** menu.

Figure 2.3 Uploading a new file

1. Enter the title you want to use for file identification in the field “File title”.
2. In the field “Additional password” you can optionally enter a password to protect your file against unauthorized access. If you make use of this option, an input field will be displayed in the “Security” field of the file list where the password has to be entered before downloading. Downloading is not possible without entering a password.
3. The **Browse** function in the “File” field allows you to search the hard drive of your computer for the desired file to be uploaded.
4. The “Comment” field may be used for entering further information on the file.
5. Select the team you want to upload the file for from the drop-down list.
6. Ticking the checkbox “Send info mail to team” will subsequently allow you to notify all members of the selected team of the newly available file.
7. Click on **Upload** to start the upload process.
8. If you have ticked the checkbox “Send info mail to team” in step 6, a form will now be displayed, which allows you to notify your team members (see the following Chapter 2.3, S. 8). Change the default text as required.
9. If you really want to use the mail, confirm by clicking on “Yes” in the “Send info mail” field.
10. To complete this step, click on **Continue**.

2.3 Notifying Team Members of New Files

When uploading a file, the info service of EFS Secure Exchange allows you to directly notify the team for which this file is intended. To do so, tick the checkbox “Send info mail to team” when you upload the file. When the upload is complete, a mail template will be displayed where you can enter a message for the team members.

- The form is filled with a predefined mail template. this template, entitled “New upload for your exchange team”, can be opened and edited in the **Libraries->Mail templates** menu, but it cannot be deleted. It is not possible to select a different mail template. It is also not possible to send different language versions.
- The following details can be entered via wildcards:
 - #team_name#: Team name
 - #filetitle#: User-defined title of the file
 - #filename#: File name

- #filecomment#: Comment
- #fileauthor#: Author

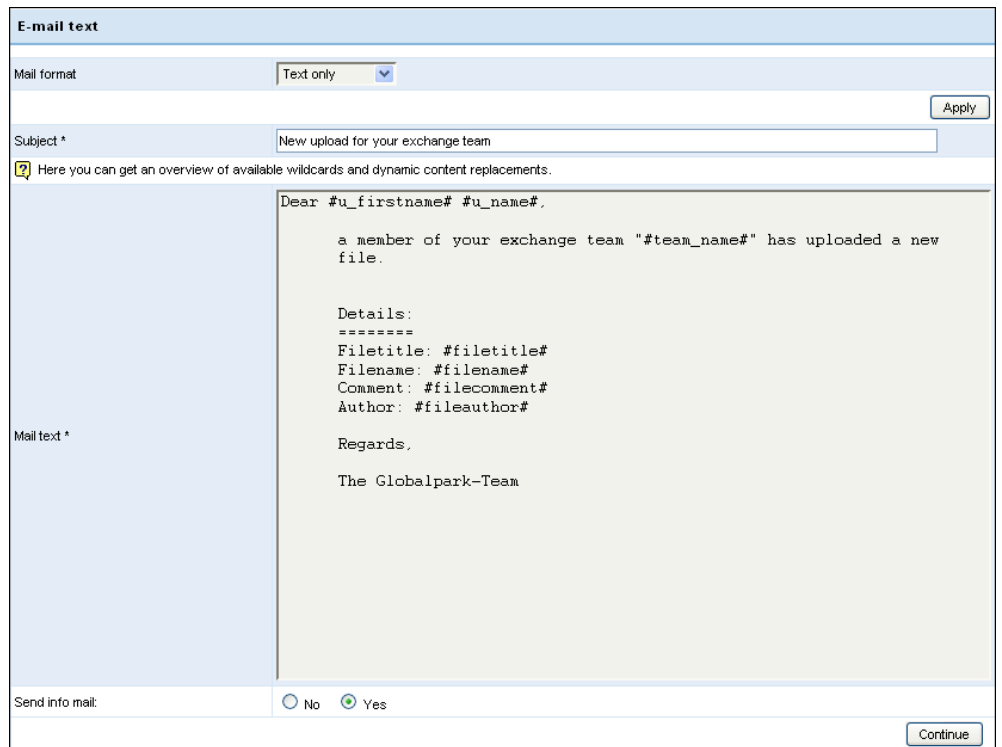


Figure 2.4 Info mail to the members of an exchange team

2.4 Downloading a File

1. Locate the file in the file list and tick the corresponding checkbox in the “Selection” column.
2. Select the “Download” action from the drop-down list.

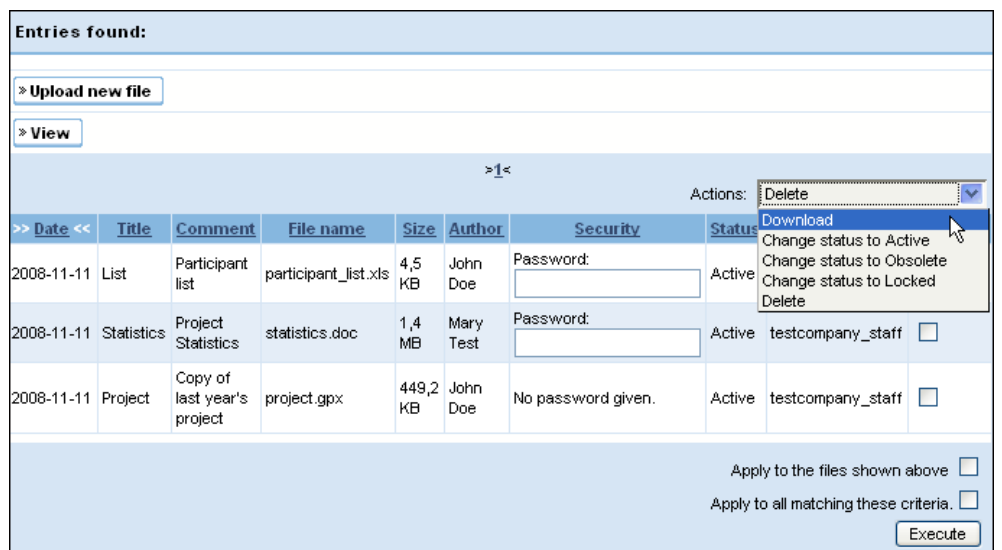


Figure 2.5 Downloading a file

3. Click on the **Execute** button.
4. The file will be transferred in a zip file. Save this file locally on your computer.

You can only download files of “active” or “obsolete” status. Locked files have to be released by their owners first. Furthermore, password-protected files can only be downloaded after entering the correct password in the appropriate text field in the “Security” column.

2.5 Changing File Status

If the uploaded files are frequently revised and replaced with new versions, assigning a file status will help you keep track.

Overview of file statuses

There are three possible file statuses to describe the degree of currentness and accessibility of a file: “Active”, “Obsolete”, “Locked”.

Status	Meaning
Active	The file is up-to-date and may be downloaded by every team member. Its status may be changed by members holding special rights and by the author of this file.
Obsolete	The file is no longer up-to-date but may still be downloaded by every team member. Its status may be changed by members holding special rights and by the author of this file.
Locked	The file has been locked. The file cannot be downloaded until the status has been changed to “Active” or “Obsolete” by the user who initiated the lock.

Table 2.2 File statuses

Changing status

In order to change the status of a file, proceed as follows:

1. Select the file by ticking the checkbox in the “Selection” column.
2. Choose the new file status from the “Actions” drop-down list.
3. Confirm by clicking on **Execute**.

Overview of files

Search

Search text Search [Extended search](#)

Entries found:

[» Upload new file](#)

[» View](#)

>1<

>> Date <<	Title	Comment	File name	Size	Author	Security	Status		
2008-11-11	List	Participant list	participant_list.xls	4,5 KB	John Doe	Password: <input type="text"/>	Active	<input type="checkbox"/>	
2008-11-11	Statistics	Project Statistics	statistics.doc	1,4 MB	Mary Test	Password: <input type="text"/>	Active	testcompany_staff	<input type="checkbox"/>
2008-11-11	Project	Copy of last year's project	project.gpx	449,2 KB	John Doe	No password given.	Active	testcompany_staff	<input type="checkbox"/>

Actions:

Download
Change status to Active
Change status to Obsolete
Change status to Locked
Delete

Apply to the files shown above
Apply to all matching these criteria.

Figure 2.6 Changing file status

2.6 Deleting a File

If you hold the requisite write rights to a file, you may delete it:

1. Locate the file in the file list and tick the corresponding checkbox in the “Selection” column.
2. Select the “Delete” action from the drop-down list.
3. Click on **Execute**.
4. Acknowledge the confirmation prompt by clicking on **OK**.
5. The file will be deleted.



EFS always retains a backup copy of deleted files. If you wish to restore an accidentally deleted file, please contact QuestBack support.

3 Managing Exchange Teams

Persons working with EFS Secure Exchange may be holding different access rights for the files to be exchanged. These access rights are managed by assigning the respective user teams to so-called *exchange teams*.

When you prepare the file exchange via EFS Secure Exchange, your first task will be to create exchange teams with the requisite rights configurations and assign user teams to exchange teams. This procedure is described in this chapter.

Depending on the situation, additional steps may be necessary:

- Ideally, the persons involved already have EFS accounts and have been assigned to completely configured user teams. If this is not yet the case, create user accounts according to the instructions in the “EFS Survey” manual, Chapter 17, and assign these to appropriate user teams.
- Normally, you have already granted the user teams access to one or more areas of EFS when creating the teams. Check this setting:
 - If you want to grant a team access to the **File exchange** menu in the EFS Survey admin area, then the team will need the access right to “EFS Survey”, i.e. it needs the ACL right “area_www”.
 - If you merely want to grant a team access to the separate fm login, then the team should have only the access right to “EFS Secure Exchange”, i.e. it should have the ACL right “area_fm”.
- If you do not want all the members of an existing user team to have the same access rights to the files to be exchanged, it may be necessary to create additional user teams and to reassign the members. An example of such a case can be found in Chapter 3.3, S. 14.

3.1 Viewing and Editing Exchange Teams

The exchange teams are managed via the **Users->Exchange teams** menu (previously: **Staff->Exchange teams**).



If you cannot see the **Exchange teams** menu, your account lacks the ACL right “exchange_teams”. In this case, please contact QuestBack Support so this right can be activated for you.



Figure 3.1 The “Exchange teams” menu

When opening the **Users->Exchange teams** menu, the overview of the existing exchange teams will automatically be displayed. The following edit options are available in the “Actions” column:

- Edit: You can change the name of the respective team.
- Change rights of this team: This function allows you to assign user teams to the exchange team and to define their rights within the context of EFS Secure Exchange. See Chapter 3.3, S. 14 for a detailed explanation.
- List members of this exchange team: Clicking on this icon prompts a pop-up window that lists the members grouped by user teams. It also lists their e-mail addresses and their rights within the context of EFS Secure Exchange.
- Delete: The team is deleted after a confirmation prompt.

3.2 Creating a New Exchange Team

In order to create a new exchange team you need the right “exchange_teams” as well as sufficient edit rights for the teams to be selected.

1. Click on the **Create exchange team** button in the **Exchange teams** menu.

Figure 3.2 Creating an exchange team

2. Enter the name into the “Team name” field. You can use the characters a-z, 0-9, _ and -.

3. In the select box labeled “Members with upload rights” you can specify one or more teams whose members are to have read and write rights for their own files only. You do not already need to specify teams when creating the exchange team: You can always assign user teams to an exchange team at a later stage. The steps required are explained in the following chapter.
4. In the select box labeled “Members with change rights” you can specify one or more teams whose members will be allowed to change the files of all team members.
5. Confirm your entries by clicking on **Create team**.

3.3 Assigning Teams and Rights Administration

In EFS, users are assigned rights according to their team affiliation (“EFS Survey” manual, Chapter 17). With regard to EFS Secure Exchange, this means that instead of assigning individual users to an exchange team you assign access rights for the files of an exchange team to one or more user teams. You may choose from different rights configurations:

- Upload right: Equivalent to the right “read” to the exchange team. The members of a team with upload rights may upload and download files. They may, however, change or delete only their own files.
- Change right: Equivalent to the right “write” to the exchange team. The members of a team with change rights can upload and download files and may change or delete all files of their exchange team.
- If you assign the rights “read” *and* “write” to a user team, the members of this team will have all rights to the exchange team and all upload and change rights. However, they will be ignored for the function “Send info mail to team”. This configuration is useful, for example, for teams of project managers who are not involved in the daily operations.

In order to subsequently assign one or more user teams to an exchange team or to change the initial settings, proceed as follows:

1. Locate the exchange team in the overview and click on the **Rights** icon.
2. This opens the dialog for rights administration familiar from other EFS menus. Assign read and/or write rights for the respective exchange team to the desired user teams as required.
3. Confirm your selection by clicking on **Change rights**.

Rights admin

[Back](#)

By choosing the right "read" you add staff members with upload rights. Members with upload rights are allowed to upload and download files. They may only change or delete their own files.
 By choosing the right "write" you will add staff members with change rights. Members with change rights are allowed to upload and download files. Additionally they may change or delete all files for the team.
 If you assign the rights "read" and "write" to a staff member, this member will have all rights to the group and all change rights. However, the member will be ignored for the function "Send info mail to team".

Change rights for "testcompany_staff"

Team	Right "read"	Right "write"
Administrator	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Kundenzugang	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input type="checkbox"/>	<input type="checkbox"/>

Figure 3.3 Assigning rights

Dividing the persons involved in a project into teams holding different rights

Often, not all persons involved in a survey project are supposed to obtain the same rights for using EFS Secure Exchange. An example: The human resources department of the company “Real Estate” wants to exchange files in preparation for an employee survey. The project managers of the HR department shall be able to freely edit all files. The other persons shall be able to download all files, however, they shall be allowed to change and delete only their own files.

In order to realize an appropriate rights administration, create the following user teams and assign the persons accordingly:

1. Real Estate project managers: Persons who are granted unrestricted access.
2. Real Estate staff: Other persons who may only download and edit their own files.

After that, assign different rights for the exchange team “Exchange team Real Estate” of the company to the two staff teams:

3. The user team “Real Estate project managers” obtains the right “write”.
4. The user team “Real Estate staff” obtains the right “read”.

4 Viewing the History

All important changes and actions executed using EFS Secure Exchange functions are logged. This allows you to subsequently check whether an action has been carried out and which user is responsible for this action. It is possible, for example, to reconstruct which users downloaded a particular file.

In order to view the list of changes, switch to the **Users->Exchange teams->History** menu.

Date of change	Affected team	Changes	Changed by
2008-11-11 11:38:16	testcompany_staff	Following file(s) was/were downloaded: test.doc.	John Doe
2008-11-11 11:33:01	testcompany_staff	The file 'test.doc' was uploaded.	John Doe
2008-11-11 11:25:13	testcompany_staff	The file 'statistics.doc' was uploaded.	Mary Test
2008-11-11 11:23:06	testcompany_staff	The file 'overview.doc' was uploaded.	Mary Test

Figure 4.1 History

For every change that has occurred the following information is listed:

Column heading	Meaning
Date of change	Date and time of change
Affected team	The team affected by the change.
Changes	Short description of the change carried out.
Changed by	Name of the staff member who carried out the change.

Table 4.1 Content of the history list

By clicking on the **View** button you can, as usual, display a section that allows you to specify whether the various table columns are to be shown or hidden. After you have confirmed by clicking on **Submit** the table will be expanded accordingly.

The column headings are clickable links: By clicking on a column heading you can re-sort the table according to the contents of the respective column.

You can search the history using the usual simple and extended search functions.

- Simple search: The fields “Changes” and “Changed by” are searched for the term you entered.

- Extended search: In addition to the keyword search in the fields “Changes” and “Changed by” you can also specify a certain change period or limit the display to the changes of a particular team. By clicking on the **Reset** button you can undo these restrictions.

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