

QuickFile



# User Guide

*Version 1.0*



QuickFile



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*Version 1.0*

\*\*\*\* MISSING FILE \*\*\*\*

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This edition applies to version 1.0 of IBM QuickFile (product number 5725-F81) and to all subsequent releases and modifications until otherwise indicated in new editions.

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## Chapter 1. Using QuickFile

IBM® QuickFile allows you to send files of any size to anyone with an Internet email account.

It provides a fast, convenient way to securely transfer files.

For example, a mortgage broker can use QuickFile to send a mortgage application to a loan customer. The customer receives the files, completes the forms, and returns the files securely using QuickFile. The mortgage broker can use QuickFile to request and receive more files, if necessary.

When you register as a QuickFile user, you can log in to the system and send files to registered and unregistered users, or request files from users. You can download the files others have sent to you. You can also use QuickFile to manage the files you have sent and received, and check to see whether the users to whom you have sent files have downloaded them. You can set options to make working with file transfers much easier and more efficient.

You can manage your QuickFile profile so other users know about you and know how to contact you.

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### Accessing QuickFile the first time

After you log in the first time, the Welcome banner appears. The Welcome banner provides information to help you use the product and to explain the benefits of using the Advanced File Transfer function.

The Welcome banner only displays on the first login and is not shown in subsequent logins.

You can close the Welcome banner at any time by clicking the **X** on the banner.

The following table identifies the sections on the Welcome banner:

Section	Instructions
Getting Started	Click one of the links to view documentation. Click <b>Read the product documentation</b> to view information to help you quickly set up the product.
Product Information	Click one of the following links to view instructions on a specific task: <ul style="list-style-type: none"><li>• “Sending files using basic transfer” on page 12</li><li>• “Managing packages and files you sent” on page 21</li><li>• Chapter 9, “Managing packages and files you receive as a registered user,” on page 29</li><li>• Chapter 5, “Requesting files,” on page 17</li></ul>

Section	Instructions
Advanced File Transfer	This section provides information about this feature and its benefits. To enable this feature, click <b>Learn more</b> in the Advanced File Transfer section. Then, follow the prompts.

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## Minimum environment requirements

To use QuickFile, your environment must meet the following minimum requirements:

- Your Internet browser must be one of the following, at the release level shown or later:
  - Microsoft Internet Explorer 8.0
  - Apple Safari 5.05 (Mac only)
  - Mozilla Firefox 6.0 (Windows only)
  - Google Chrome 10.0 (Windows only)
- Your browser must have cookies enabled.
- Your browser must have JavaScript enabled.

See your browser documentation for information on enabling cookies and JavaScript.

To get the most from your experience with QuickFile, configure one of the browsers identified in the Preferred environment topic.

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## Preferred environments

Use one of these preferred Internet browsers to take advantage of all QuickFile features.

Preferred browsers are HTML5 compliant and are at a release level that supports HTML5 features. These features include the ability to drag objects onto the HTML page. The following list identifies the preferred HTML5-compliant browsers:

- Apple Safari 5.1 (Mac only)
- Mozilla Firefox 7.0 (Windows only)
- Google Chrome 10.0 (Windows only)

Make sure your browser has the Java™ plug-in installed.



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## Chapter 2. Registering with QuickFile

To take advantage of the full range of QuickFile features, register as a QuickFile user.

Register with QuickFile to receive the following benefits:

- View detailed information about files you have sent and received
- Send files to registered and unregistered users
- Send large files quickly
- Pause and resume file transfers
- Request file transfers from others

Register as a QuickFile user from any email that notifies you about the receipt of a file transfer.

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### Registering from an email invitation to register

If enabled, you can register as a QuickFile user from an email sent to you by a registered user.

#### About this task

To register from an email sent to you by a QuickFile user:

#### Procedure

1. In the email, click **Register**. The Registration page opens with your email address pre-populated.
2. In **Full Name**, enter your given name and surname. For example: Jonathan Smith.
3. In **New Password**, enter the password you will use to access your QuickFile account.  
Click the information icon for the **New Password** field to view password requirements.
4. In **Confirm Password**, re-enter the password you typed. You are not allowed to cut and paste.
5. Click **Submit**.
6. Return to the QuickFile web site, where you can now log on.

---

### Registering from a download notification email

If enabled, you can register as a QuickFile user from a download notification email.

#### About this task

To register from a download notification email:

## Procedure

1. In the email, click **Register**. The Registration page opens with your email address pre-populated.
2. In **Full Name**, enter your given name and surname. For example: Jonathan Smith.
3. In **New Password**, enter the password you will use to access your QuickFile account.  
Click the information icon for the **New Password** field to view password requirements.
4. In **Confirm Password**, re-enter the password you typed. You are not allowed to cut and paste.
5. Click **Submit**.
6. When you receive an email to confirm your registration, follow the instructions in the email.

---

## Registering from the QuickFile log in page

If enabled, you can register as a QuickFile user from the QuickFile log in page.

### About this task

To register as a user from the log in page:

## Procedure

1. In your Internet browser's web address field, type:  
www.<QuickFilewebsiteaddress>.com and press Enter.
2. On the Login page, click **Register**. The Registration page opens.
3. In **Full name**, type your given name and surname. For example: Jonathan Smith.
4. In the **Email address** field, type the email address at which you want to receive notifications.
5. In the **Confirm email address** field, re-enter the email address.
6. In **New Password**, type the password to use to access your QuickFile account.
7. In **Confirm Password**, re-enter the password you typed. You are not allowed to copy and paste your entry.
8. Click **Registration**. A confirmation email is sent to the email address you entered.
9. Open the confirmation email and click the link to complete the registration. When the confirmation is successful, you receive a confirmation message.
10. On the confirmation page, click **login**. The Login page opens. You can now log in.

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## New User Registration field definitions

The New User Registration field definitions provide explanation of the fields on the New User Registration page.

Field	Definition
Full name	Your given name and surname. Enter 100 or less characters. Required.

<b>Field</b>	<b>Definition</b>
Email	The email address at which you want to receive notifications. Must be a valid existing email address and must be less than 256 characters in length. This field is not case sensitive. Required.
Confirm Email Address	This email address must match the email address in the <b>Email</b> field.
New Password	The password you want to use to log in to QuickFile. Must conform to password requirements. Required.
Confirm Password	Retype your new password. You cannot copy and paste your entry from the <b>New Password</b> field. Required.



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## Chapter 3. Logging in successfully

Before you log in, you must be a registered user of QuickFile. To log in successfully, provide your email address and password.

### Logging in

To log in, type your email address and password. Click **Log In**. After you log in, the Welcome page is displayed.

### Log in questions

Refer to the following table to get help with log in questions:

Log In Questions	Solution
What if I forget my password?	If you cannot log in because you have forgotten your password, click <b>Forgot password?</b> on the Login page. Refer to “Resetting your password if you forget it” for instructions.
What if my password is about to expire?	If your password is about to expire, you receive a message after you log in, letting you know. To change the password, click <b>Yes</b> on the message dialog and follow the prompts. Refer to “Resetting your password before it expires” on page 8 for instructions.
What if my password has expired?	If your password has expired, you receive a message when you attempt to log in. To change the password, click <b>Yes</b> on the message dialog.  Refer to “Changing your password” on page 34 for instructions.
What if I want to change my password?	If your password is too hard to remember, change your password by editing your profile.  Refer to “Changing your password” on page 34 for instructions.
Can I use my corporate directory (LDAP) user ID and password?	You can use your LDAP credentials to log in to QuickFile if your administrator enables this environment. When you are asked for your user name and password, type your LDAP credentials
Can I use my corporate directory (LDAP) credentials to change my password or update it using QuickFile?	No. You cannot reset your LDAP password or change it using QuickFile. If your password expires, contact your administrator for instructions.

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## Resetting your password if you forget it

If you cannot remember your QuickFile password, you can reset it from the Login page.

## Before you begin

If your password information is maintained by the QuickFile administrator, you can reset your password with this method. If, however, the password you use is maintained as part of your company's directory, you must reset it there. In this case password reset is not available through the QuickFile login page.

### Procedure

1. From the Login page, click **Forgot password**.
2. On the Reset Password dialog page, type your email address.
3. Click **Submit**. A message displays the email address where the password reset email is sent.
4. Open the password reset email and make a note of the temporary access code.
5. Click the **Click here to reset your password** link.
6. On the Password Reset page, type the following information:
  - Temporary access code sent to you in the email

**Note:** The access code is only valid for a limited time.

- New password in the **New Password** and **Confirm Password** fields

**Note:** Click the Information icon for the **Enter new password** field to view password requirements. Use the guidelines to ensure that you define a valid password.

7. Click **Submit**.

---

## Login page field definitions

The Login page allows you to log in and to reset your password if you forget it.

Definitions of the fields on the Login page are described in the following table:

Field	Definition
Email address	The email account you used to register as a QuickFile user. Required.
Password	The password you set up when you registered with QuickFile. Required.
Forgot password	Click this link to reset your password if you forget it. Provide your email address and a temporary code is emailed to you. From the Password reset page, provide the temporary code and define the new password.
Register	Click this link to navigate to the New User Registration page.

---

## Resetting your password before it expires

If you are required to change your password and the password is close to expiring, you receive a message to that effect after you log in.

### About this task

**Note:** If your QuickFile password is managed through your company directory, this procedure does not apply to you.

To reset your password:

### Procedure

1. Hover your mouse over your user ID in the banner navigation menu and click **Profile**.
2. Click the **Change password** link. The Change Password window opens.
3. Type the new password in both the **New Password** and **Confirm Password** fields.

**Note:** Click the information icon next to the **New Password** field to view the policies required to define a valid password.

4. Click **Save**.

---

## User settings overview

The **User Settings** page allows you to customize the way QuickFile works for you.

By hovering over your profile name on the navigation menu and then selecting **Options**, you can display the options to customize your experience of QuickFile. Options affect two areas of functionality:

- whether you use Advanced File Transfer to download all files
- which email notifications you want to receive

For information on using Advanced File Transfer, see “Enabling Advanced File Transfer” on page 13

For information on setting email notifications, see “Enabling email notifications” on page 41





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## Chapter 4. What is the best way to send a file?

QuickFile provides two ways to send files. Use basic file transfer to send files smaller than 2 GB. Use Advanced File Transfer to send files larger than 2 GB.

The basic file transfer is available as soon as you log in. If you plan to send files smaller than 2 GB and you do not need to send multiple files simultaneously, use this default method.

To send files larger than 2 GB, enable the Advanced File Transfer application. Use it to transfer very large files that Internet browsers cannot normally transfer. The Advanced File Transfer application also gives you the ability to restart a file transfer in the event of a system shutdown, pause a large file transfer and resume the transfer later, and cancel a file transfer. You can send all files in a package at the same time. You can uninstall this application if you no longer want to use it or if your company instructs you not to use it.

You must install a Java Runtime Environment (JRE) before you can enable and use the Advanced File Transfer application.

Refer to the following table to answer commonly asked questions about this feature:

Question	Answer
When do I use the basic file transfer?	Use basic file transfer to send files smaller than 2 GB and to send files one at a time.
Do I use the same method to send files to a registered user and an unregistered user?	Yes. You can use the basic file transfer or the Advanced File Transfer to send files to a registered or an unregistered user.
When do I use Advanced File Transfer?	Enable and use Advanced File Transfer when you send or receive files over 2 GB. It also provides the ability to pause, resume, and cancel transfers.
Are there any special requirements to use Advanced File Transfer?	Yes. A JRE must be installed before you can enable and use Advanced File Transfer.
If I use Advanced File Transfer, are my transactions secure?	Yes. Advanced File Transfer transactions are secure. Transactions are automatically signed with the configured SSL server certificate when the server starts. Initially, this is a self-signed certificate. Be sure to configure a CA-signed server certificate to make sure Advanced File Transfer transactions are secure.
Can I use the basic transfer for some transactions and the Advanced File Transfer for others?	No. After you enable the Advanced File Transfer, it will be used for all transfers and downloads. You can disable it if you want to use the basic transfer method.
Can I enable Advanced File Transfer for all downloads and transfers?	Yes. Enable Advanced File Transfer and it is used for all future transfers.
What if I do not want to use Advanced File Transfer for future transfers and downloads?	You can disable Advanced File Transfer by opening the Options page and turning off <b>Enable Advanced File Transfer</b> .

Question	Answer
How do I enable Advanced File Transfer?	You have two ways to enable Advanced File Transfer within QuickFile: from the Options page and the Welcome panel. After you enable it from either area, this method is used for all future transactions.
How do I know when a file transfer is sent?	If you want to receive a notice when a transfer is complete, enable the option, <b>Notify me upon receipt</b> .
When I send a file, can I limit the amount of time that I allow a user to download the file?	Yes. Use the <b>Expires in</b> option to identify how long a user is given to download a file before it expires.

---

## Sending files using basic transfer

Use the basic transfer to send small files or if you want to send a few files. To send large files over 2 GB or to send packages in parallel, enable and use the Advanced File Transfer feature.

### Before you begin

Before you can send a file, you must register and log in.

### About this task

With QuickFile, you can send files to one or more users. A user can be registered with QuickFile or unregistered. A registered user stored information in the product. If a user is not registered, you can send files to this user if you have their email address.

When you send files to a registered user, the download link that is included in the email is secure. After the registered user clicks the secure link, the user must log in before they download the files.

**Restriction:** You can send up to 100 files in a transfer.

To send files by using the basic transfer:

### Procedure

1. Click **Transfers > Sent** in the banner navigation menu. The Sent Files page opens.
2. Click the **Send Files** button. The Sent Files window opens.
3. In the **Send to** field, type the email address of the users to receive the file transfers.

**Note:** If you already sent a file to a user, if the user is registered, or if the user was added by your administrator and logged on at least once, the email address is populated as you type.

4. Type a subject for the email in the **Subject** field.
5. In the **Message** field, type message text to accompany the file transfer.
6. Click **Browse** and select the file to send in the **Attach file** field. If your browser is HTML5-compliant, drag the file onto the page to attach it. When this feature is available, a **Drag files here** label is displayed.

7. To change the default value of the expiration date and the notification method, click the expansion icon for **Options** and define the following values as needed and as allowed by your administrator.
  - To limit how long the files are available for download, select the number and units of measure in the **Expires In** field. For example, select 3 and Days to set the download to expire in 3 days.
  - To receive notification when files are downloaded, select **Notify me upon receipt** in the **Notification** field. Otherwise, select **Do not notify me**.
  - To save the options you defined as the defaults for future file send operations, check **Make these options the defaults for future file sending**.
8. Click **Send**. The upload progress bar shows the status of the file transfer. When the file or files finish uploading, a confirmation message is displayed. If you are sending multiple files and one or more fails to successfully upload, the entire upload fails. In this case, restart the file transfer or contact your administrator.

**Note:** If you try to send a file with a size that exceeds the system or group limit, **Pending transfer unavailable** might be displayed on the Sent Files page. To delete, select the file transfer and click **Remove selections**.

---

## Enabling Advanced File Transfer

If you want to send files larger than 2 GB, enable Advanced File Transfer.

### About this task

Advanced File Transfer allows you to download large files, over 2 GB. You can also send multiple transfers simultaneously, pause the transfer and resume it at a later time, and cancel the file transfer. You can disable this feature if you no longer want to use it or if your company instructs you not to use it.

Before you can enable this feature, make sure that a Java Runtime Environment (JRE) is installed on your computer. You can enable this feature from two locations: the Welcome banner and the Options page.

**Restriction:** You can send up to 100 files in a transfer.

To enable the Advanced File Transfer feature from the Options page:

### Procedure

1. On the navigation menu, hover over your profile name and select **Options**. The Options page opens.
2. Click **Enable Advanced File Transfer** until the option is enabled.

If this is the first time to enable the application, a Java Enablement Check dialog box is displayed. Click **Yes** to test the Java level for your browser, then click **Ok** to close the dialog box.
3. Click **Save**. A message is displayed, that Advanced File Transfer has been enabled.

If this is the first time to enable the application, a dialog box to run the application is displayed. Click **Run**.

**Attention:** If the application version changes, it is downloaded again.

---

## Sending files using Advanced File Transfer

Use the Advanced File Transfer for files larger than 2 GB and when transferring a large volume of files.

### Before you begin

Before you can send a file, you must register and log in.

### About this task

With QuickFile, you can send files to one or more registered or unregistered users. A registered user provided information about himself and the information is stored in QuickFile. An unregistered user has not provided information but you have an email address for the individual.

When you send files to a registered user, the download link included in the email is secure. After clicking the secure link, the registered user must log in before downloading the files.

**Restriction:** You can send up to 100 files in a transfer.

To send files using the Advanced File Transfer application:

### Procedure

1. Click **Transfers > Sent** in the banner navigation menu. The Sent Files page opens.
2. Click **Send Files**. The Send Files window opens.
3. In the **Send to** field, type the email address of users to receive the files.

**Note:** If you have previously sent a file to a user, if the user is registered, or if the user was added by your administrator and has logged on at least once, the user's email address is populated as you type.

4. Type information in the following fields:
  - Subject
  - Message (optional)
5. Click **Browse** and select the files to send in the **Attach file** field.
6. To change the expiration date and notification method, click the expansion icon for **Options** and define the following values as needed and as allowed by your administrator:
  - Expires In
  - Notification method
  - Update the default values of option
7. Click **Send**. The upload progress bar shows the status of the file transfer. If you are sending multiple files and one or more fail to successfully upload, the entire upload fails. In this case, redo the file transfer.
8. Take one of the following actions as needed:
  - To cancel the upload, click the **Cancel transfer** icon
  - To pause the upload, click the **Pause transfer** icon
  - To resume the upload, click the **Resume transfer** icon

---

## Disabling Advanced File Transfer

You can disable Advanced File Transfer if you no longer want to use it or if your company instructs you not to use it.

### About this task

The Advanced File Transfer application allows you to more efficiently transfer very large files. However, disable this application if you no longer want to use it.

To disable the Advanced File Transfer application:

### Procedure

1. Click your profile in the navigation menu and select **Options**. The Options page is displayed and the Advanced File Transfer option is enabled.
2. Click Enable Advanced File Transfer until the option is disabled.
3. Click **Save**.

---

## Send Files field definitions

Use the Send Files page to define a file transfer.

The following table describes the fields you complete on the Send Files dialog:

Field	Description
Send to	The email address of the people to receive the file transfer. You can enter multiple addresses. Press Enter after each email address. If an individual is registered with QuickFile, the address populates automatically as you type. At least one email address is required.
Subject	The subject of the file transfer. Length can be up to 128 characters. Required.
Message	Information about the files you are sending. Length can be up to 1000 characters. Optional.
Attach file	Click <b>Browse</b> and navigate to the files to send.  If you are using the basic transfer and using a browser that supports HTML 5, you can also drag files from your computer onto the page. Required.
Expires in	How long the recipient will be able to access the files from the email link. Units include hours, days, weeks, months, and years. The ability to change this field is determined by your system administrator. Optional.
Notification	Enable to receive an email when the files have been successfully downloaded by the recipient.  Options include: Notify me upon receipt or Do not notify me. Default is to notify.
Make these options the default for future file sending	Enable this option to use the values set for this file transfer for all subsequent send operations. Optional.



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## Chapter 5. Requesting files

Complete the Request files form to request files.

### About this task

After you send the request, the recipient receives an email requesting the files.

**Attention:** When you request files from another user, the files that the other user sends expire five days from the time they are sent. For example, you send a request to Fred@CompanyA.com to send files. Fred@CompanyA.com sends the file sample.txt on October 1, 2013 at 6:00 a.m. You can download the file until October 6, 2013 at 6:00 a.m.

### Procedure

1. Click **Transfers > Sent** or **Transfers > Received**.
2. Click **More > Request Files**.
3. Type the email address of the recipient in the **Request From** field.
4. Type a short subject for the invitation in the **Subject** field.
5. Type a short message to describe the files you want to receive in the **Message** field.
6. Click **Send**.

An email requesting files is sent to the recipient.

---

## Request files field definitions

The following table defines the fields on the Request files page:

Field	Description
Request From	The email address of the user from whom you are requesting files. Required.
Subject	A short description of your request. Maximum of 255 characters. Required.
Message	A message specifying what files or information you are seeking from the recipient. Maximum of 1,000 characters. Optional.

---

## Responding to a request for files

If you are an unregistered user, you can send files to a QuickFile user only when you receive an email from that registered user requesting files.

### About this task

To send a file to a registered user when invited to do so:

### Procedure

1. Locate the files to send and make them available on your computer.
2. In the email from the person requesting the files, click the link **Send Files to Requester** where *Requester* is the user requesting the files.

3. On the **File Submission** page, complete the following steps:
  - a. Type a subject in the **Subject** field.
  - b. Type a message describing the files you are sending in the **Message** field.
  - c. To attach the files to send, either drag the files from your computer to the **Drag files here** box or click **Browse** and select the files to send.

**Note:** Dragging is only supported by HTML 5-enabled browsers. If your browser supports this feature, the **Drag files here** box is displayed.

4. Click **Send**. After the file is successfully sent, you receive an email notification. After the file is downloaded by the person who received the files, you receive an email notification.

## File submission field definitions

Unregistered users can send files, when requested to do so, by using the File Submission page.

The following table defines the fields on the File Submission page:

Field	Description
Subject	A short description of the email. Required.
Message	A message to specify what information is being requested.
Attach file	Click <b>Browse</b> and navigate to the files to send or drag files from your computer onto the File Submission page. If your browser supports HTML 5, you can drag your files to the <b>Drag files here</b> box. Required.
Send a confirmation email to my address after my files have been successfully sent	Click the check box to receive a confirmation email after your files are sent successfully. Optional.
Send a notification email to my email address to confirm that the files have been downloaded successfully	Click the check box to receive a notification email when the files are successfully downloaded. Optional.



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## Chapter 6. Inviting users to register with QuickFile

If authorized by your system administrator, you can invite people who are not registered with QuickFile to register. Registering allows users to take advantage of more application features.

### About this task

To invite others to register:

### Procedure

1. Locate the files to send and make them available on your computer..
2. Click **More > Invite users**. The **Invite Users** dialog opens. For more information, see “Invite others to register field definitions”.
3. In **Send invitations to**, type the email addresses of users to invite.
4. Type a **Subject** for the invitation.
5. Type a **Message** to the users you are inviting.
6. Click **Send**. The email message is sent to the addresses you provided. Each user must respond within the period set by your administrator or the invitation expires.

---

### Invite others to register field definitions

The following table describes the fields on the **Invite Users** page.

Field Name	Definition
Send invitations to	The email addresses of people you invite to register as users of QuickFile. You can enter multiple addresses. Addresses must be in valid email address format, for example, johndoe@acmeisp.com. At least one is required.
Subject	A brief statement of the invitation purpose. Length can be up to 255 characters. Required.
Message	A message with further information or direction about your request. Length is up to 1000 characters. Optional.



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## Chapter 7. How to manage file transfers you sent

If you are a registered user, use QuickFile to view and manage files you sent.

The following information about the files you sent is available on the Sent Files page:

- Package information, including the subject in the email sent, the recipients, and the date and time it was sent
- Information about a file in a package including the file name, its size, and the download status
- A summary of how many file transfers you sent

Use the following functions on the Sent Files page to manage file transfers you sent:

- The ability to order packages and files with sort
- The date and time a file is downloaded
- The ability to resend a package to the same user or forward a package to new users
- The ability to change the expiration date on a package to allow a user more time to download it
- The ability to remove packages from the listing
- A banner with information such as notice that a file transfer you sent is about to expire
- The ability to pause a file transfer and restart it at your convenience, and to cancel a transfer, if you enable Advanced File Transfer

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### Managing packages and files you sent

As a registered user, you can view a list of packages and files that you sent. You can sort packages, remove packages, and view all files in a package. You can also forward or re-send a file, or change the expiration. If you send a file with the Advanced File Transfer application, you can view the progress of a download, pause and resume a transfer, and cancel it.

#### About this task

To manage outgoing packages and files you sent:

#### Procedure

1. If the Sent Files page is not open, click **Transfers** from the menu and select **Sent**. The Sent Files page opens.
2. For each package you sent, view the following information:
  - **Subject** for the package. The number of files in the package displayed in parentheses
  - **Sent to** identifies to whom the package was sent
  - **Date** identifies when the package was sent, including date and time
  - If a package expires in the next two days, a warning icon appears

3. If you used Advanced File Transfer to send files, the status of the upload appears. Take one of the following actions as needed:
  - To cancel the upload, click the **Cancel transfer** icon
  - To pause the upload, click the **Pause transfer** icon
  - To resume the upload if it is paused, click the **Resume transfer** icon
4. To sort the listing, take one of the following actions:
  - a. If the column is selected, click the direction icon for the column heading.
  - b. If the column is not selected, click the column heading itself.
5. To identify whether the user downloaded files in a package, mouse over the recipient name in the **Sent to** field. The recipients and the status of the file transfer are displayed.
6. To view the files contained in a package, click the expansion icons for the package.

**Remember:** To view file information and access the following management options, make sure that the package is expanded.

7. View the following information about the files in a package:
  - **File** lists the names of the files in the package
  - **Size** identifies the size of the file sent
  - **Uploaded** identifies the date and time the file was transferred
  - For files sent with the advanced file transfer application, view the progress of the download. You can also pause and resume an advanced file transfer.
8. To resend a file, click **Resend**, and click **Send**.
9. To forward a package:
  - Click **Forward**.
  - Type all email addresses that should receive the package.
  - Click **Submit**.
10. To change the expiration date and allow a user more time to download a file:
  - Click **Change expiration**.
  - Select a new expiration date in the **Change expiration to** field and click **Save**.
11. To collapse the package and remove the file information display, click the File expansion icons again.
12. To remove a package from the Sent Files listing, click the check box for the package and click **Remove selections**.
13. To remove all packages from the Sent Files listing display, click the check box for the **Subject** label and click **Remove selections**.
14. To change the number of events displayed on a page, click one of the values in the **Show** field.
15. If more than one page of events is available, click **Next** to display the next page.
16. To move back to a previous page, click **Previous**.
17. To move to a specific page, type the page number in the **Jump to page** field or click on the page number on the **Page** heading.

---

## What information is available about files I have sent?

When you send files to users, you upload the files to a common location and users download them to their computer. You identify how long the user is given to download a file before it is no longer available.

Use the information in the following table to understand information available on files you sent:

File Transfer Questions	Solution
Will I be notified when a package I sent is about to expire?	If enabled by the QuickFile administrator, you might be notified up to two times before the file transfer expires.
Can I change the expiration date defined in a file transfer to allow the user more time to download a file?	Yes. To change the file expiration date, from the Sent file listing, find the file transfer that you want to change. Expand the file transfer and click <b>Change expiration</b> . Select or type the new expiration date and click <b>Save</b> .
If a file transfer expires before the user downloads it, can I resend it without having to create a new file transfer transaction?	While the package is included on your Sent Files list, you have the opportunity to resend. To send an expired file transfer transaction again, select the file transfer from the <b>Sent Files</b> page, expand the transaction, and click <b>Resend</b> . Click <b>Confirm</b> to confirm the new transaction.
Can I send a file transfer that I already sent to additional users?	Yes. You can send a file transfer to one or more additional users by using the <b>Forward</b> option. Select the file transfer to forward from the <b>Sent Files</b> page, expand the transaction, and click <b>Forward</b> . Type the email addresses of the new users to receive the file transfer. Click <b>Submit</b> .
If my file listing gets cluttered, can I remove transactions from the display?	Yes. You can remove files from the listing. Select the file transfer to remove, and click <b>Remove selections</b> . After you remove the file, you will no longer be able to display it.

---

## Sent Files field definitions

Use the Sent Files page to view information about packages and files you sent.

The following table contains descriptions of the fields on the Sent Files page. For each column on the page, you can sort the list of items by clicking the sort icon of a column.

Field	Description
Remove selections	Click this button to remove a package from the Sent Files listing. To remove a package, click the box for the package and click <b>Remove selections</b> . To remove all packages on the page, click the check box for the <b>Subject</b> label and click <b>Remove selections</b> .
Subject	The subject you defined when you send the package. The number in parenthesis identifies how many files are included in the package. You can sort information in this column.

<b>Field</b>	<b>Description</b>
Sent to	Email of the recipient of the file transfer. If the package was sent to more than one person, only the number of recipients is displayed, for example, 2 recipients. You can sort information in this column.
Date	The date and time the package was sent. If the package was sent using the advanced file transfer plug-in, the progress of the download is displayed.
Advanced File Transfer icons	If the package was sent using the Advanced File Transfer feature, the progress of the download is displayed in the <b>Uploaded</b> field after the package is expanded. If the transfer is in progress, use the icons to pause the transfer and resume it when ready or cancel it.
Message	The message you entered when you sent the file transfer package.
File	After a package is expanded, the files sent in the package are displayed. You can sort information in this column.
Size	The size of the file sent.
Uploaded	The status of the file being uploaded to the server. If the upload is complete, the date and time of the upload is displayed.
Resend	Click this option to resend the package that is expanded to the same recipients.
Forward	Click this option to forward the package. Expand the package to forward, select the recipients to receive the package, and click <b>Forward</b> .
Change expiration	Click this option to change the expiration of the package. Expand the package to modify and click <b>Change expiration</b> . Select a new expiration date and click <b>Save</b> .

---

## Chapter 8. About managing files you receive

If you are a registered user, use QuickFile to download packages or files you receive and view information those packages or files.

The following information about the files you received is available on the Received Files page:

- Information on each package, including the subject used in the email you received, who sent it, and the date and time it was sent
- Information on each file in a package including the file name, its size, and the download status
- Information on when a package expires so you know your deadline for downloading files
- A summary of how many incoming file transfers you received
- Information on when a file was downloaded

Use the following functions on the Received Files page to manage file transfers you received:

- The ability to sort information to allow you to order the files
- The ability to download files
- The ability to remove files from the list

If you download the Advanced File Transfer application, you can use the basic functions as well as the following advanced functions:

- The ability to download individual files or all the files in a package
- The ability to download files larger than 2 GB
- The ability to pause the download of a large file and resume it at your convenience
- The ability to cancel a file download

---

### What is the best method to use to download a file?

QuickFile provides two options to download files. Use the information provided in this topic to decide the best method to use for your environment.

Questions	Answer
I want to download a few small files. What is the best method to use?	<p>If you receive files smaller than 2 GB, you can use basic download, available by default when you deploy the product. However, you can download only one file at a time.</p> <p>If you want to download more than one file at a time, enable the Advanced File Transfer application and use it. You can download all files in a package as well as more than one package at a time.</p>

Questions	Answer
I am downloading a large volume of small files. What is the best method to use?	If you download a large volume of small files, you can use basic download. However, files are downloaded one at a time. To enable the ability to download multiple files concurrently, activate the Advanced File Transfer application.
I want to download large files over 2 GB. What method of downloading is the most efficient?	Internet browsers limit the size of a file that can be downloaded. To enable the ability to download files larger than 2 GB, activate the Advanced File Transfer application.
When can I download an entire package and when do I download files one at a time?	If you want to download a package, you must enable the Advanced File Transfer feature. If you use the basic download, you can only download one file at a time.
How do I download a file from email?	Download a file from a QuickFile email by clicking on the <b>File Name</b> link.
I click <b>Download</b> but instead of downloading the file, the file opened.	Download behavior is affected by your browser settings. If your browser defines that a type of file is opened when you click it, it is opened when you click <b>Download</b> in QuickFile.

---

## Using the Advanced File Transfer feature to download files

If you are a registered user, you can use the Advanced File Transfer feature to download large files over 2 GB.

It allows you to download large files and ensure that the files download without being blocked by your browser. If you want to pause the download of a file to allow you to perform other work without interference, you can pause the download. When you are ready to continue, click resume and the file continues to download at the point where you paused it. You can also cancel a download.

After enabling this feature, you are ready to download a file or a package.

---

## Downloading a file using basic download

Use the basic download for files smaller than 2GB. Each file is downloaded one file at a time.

The basic download is enabled by default when you deploy QuickFile. Use this tool to download files smaller than 2GB and to download files one at a time. To download large files or more than one file at a time, enable the Advanced File Transfer application. Basic download is used until you enable the Advanced File Transfer application.

When you download a file using the basic method, click **Download** and the file is saved to your local drive. Where it is saved is determined by the browser.

- Downloading a file from a Chrome browser saves the file into the default download directory for Chrome.
- Downloading a file from a Chrome browser saves the file with the original file name.



- In FireFox, the file is downloaded, and a new browser tab opened. You must select **File > Save As**.
- In FireFox, you identify the file name to use and if necessary, a new or different directory.



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## Chapter 9. Managing packages and files you receive as a registered user

After you receive packages containing files, you can use QuickFile to download the packages or files and view their status.

### Before you begin

Register with QuickFile before you can log in and download files by using this method.

To download files you receive and view their status:

### Procedure

1. Click **Transfers** > **Received** from the menu.
2. For each package you receive, view the following information:
  - **Subject** for the package. The number of files in the package is displayed in parentheses.
  - **Sent by** identifies who sent the package
  - **Date** identifies when the package was sent, including date and time
  - If a package is close to expiration, a warning icon is displayed
3. To sort the listing, perform one of the following actions:
  - If the column is currently selected, click the direction icon for the column heading.
  - If the column is not currently selected, click on the column heading itself to display the direction icon. Click this icon to sort the listing.
4. To view files in a package, click the expansion icon for the package. View the following information:
  - **File** for the package and the number of files in the package in parentheses
  - **Size** identifies the size of the file
  - **Download status** information
  - For files sent with the Advanced File Transfer feature, view the progress of the download. You can also pause and resume the download.
5. To download one file, click **Download file** for the file you want.
6. To download all files in a package, click **Download all files**.
7. If you use the Advanced File Transfer feature, the status of the download appears while the download is in progress. Take one of the following actions as needed:
  - a. Click the **Pause transfer** icon to stop the download process
  - b. Click the **Resume transfer** icon to restart the download process
  - c. Click the **Cancel transfer** icon to cancel the download.
8. To change the number of processes displayed on a page, click one of the values in the **Show** field.
9. If more than one page of events is available, click **Next** to display the next page.
10. To move back to a previous page, click **Previous**.

11. To move to a specific page, type the page number in the **Jump to page** field or click on the page number on the **Page** heading.

---

## What information is provided on the Received Files listing?

When users send you files, you can download them from the email that notifies you that you received a file. You can also open the Received Files page and download files from within QuickFile.

Refer to the following table to get help with download questions.

File Transfer Questions	Solution
Will I be notified when a package I receive is about to expire?	Yes. A message is displayed in the Welcome banner.
What if the message that a file I received is expiring is displayed in the page banner?	If you receive the message that a file is about to expire, find the file in the Received Files page and download it immediately. A yellow caution icon is displayed for every file that expires in the next two days.
What if I want to delete files in my list?	You can easily remove files or packages from the Received listing. Select the item to remove and click <b>Remove Selections</b> .  <b>CAUTION:</b> <b>After you remove a file from a listing, it cannot be restored.</b>
What if a file I want to download is no longer available?	View history information for information about the file that is not available. Contact the sender for more information.  <b>Attention:</b> This does not apply on the Received Files page. It only applies if you are downloading from email.
How do I know how many files are included in a package?	You can view how many files are in a package by expanding the package. All files in the package are displayed.

---

## Received Files listing field definitions

Use the Received Files page to keep track of files that are sent to you.

The following table describes the fields in the Received Files page. For each column on the page, you can sort the list of items by clicking the sort icon of that column.

Field	Description
Download selections	This option is only available when Advanced File Transfer is enabled. Click this button to download a package from the Received Files listing. To download a package, click the box for the package and click <b>Download selections</b> . To download all packages on the page, click the box for the <b>Subject</b> label and click <b>Download selections</b> .

Field	Description
Remove selections	Click this button to remove a package from the Received Files listing. To remove a package, click the box for the package and click <b>Remove selections</b> . To remove all packages on the page, click the box for the <b>Subject</b> label and click <b>Remove selections</b> .
Subject	The subject defined by the sender to describe the file transfer. The number in parentheses identifies how many files are included in the package. You can sort information in this column.
Sent by	Person who sent the file transfer. You can sort information in this column.
Date	The date and time the package was sent. If the package was sent using the Advanced File Transfer feature, the progress of the download is displayed.
File	After a package is expanded, the files in the package are displayed. You can sort information in this column.
Size	The size of the file.
Download Status	This column identifies the status of a file download. If the download is complete, the date and time of the download is displayed. If the download is initiated using the Advanced File Transfer feature, a progress bar displays the percentage of transfer complete.
Advanced File Transfer icons	If a package download was initiated using the Advanced File Transfer feature, the progress of the download is displayed after the package is expanded. If the download is in progress, you can use the icons to pause the transfer and resume it when ready, or cancel the transfer.
Download file	To download one file, expand the package, select the file, and click <b>Download file</b> .
Download all files	This option is only available when Advanced File Transfer is enabled. To download all files in a package, expand the package and click <b>Download all files</b> .



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## Chapter 10. Profile overview

A profile defines information about the user. It is created when a user registers. It can then be updated with additional information about the user, including a photo, job title, address, and fax number.

QuickFile allows you to create and edit information about yourself. That information includes details about your job title, address, and a fax number. You can also include a photo of yourself in your profile.

This information is created when you register or when you are registered by your administrator. After registration, you can edit this information by editing your profile

---

### Viewing your profile

View your profile to review the information QuickFile maintains about you. This information includes your name, title, company name, address, phone number, fax number, and a photo.

#### About this task

View the profile that is created when you registered.

#### Procedure

1. From the navigation menu, hover over your name, then click **Profile**. The **Profile** page is displayed.
2. View the following information:
  - Name
  - Title
  - Company
  - Email address
  - Your photo
  - Salutation
  - Address
  - Phone
  - Fax

---

### Editing your profile

Edit your profile if you want to change or add to the information QuickFile maintains about you.

#### Before you begin

#### About this task

To edit your profile and change your profile information:

## Procedure

1. From the navigation menu, hover over your user name, then click **Profile**. The **Profile** page is displayed with your information.
2. Under your name and photo, click **Edit**.
3. As needed, change the **Name**, **Title**, or **Company** fields on the **About Me** tab.
4. To add or change your photo, click the **Photo** tab. Click **Browse** and browse to the .JPG, .GIF, or .PNG file to use for your photograph.
5. Click **Save**.
6. To make additions or changes to your contact information, click **Edit** in the **Contact Information** section.
7. Make entries in the editable fields. See “Profile field definitions” on page 35 for more information on these fields.
  - Salutation
  - Address
  - Phone
  - Fax
8. Click **Save**.

---

## Changing your password

If allowed by your administrator, you can change your password using the link provided on the **Profile** page.

### About this task

If you manage your password through QuickFile, you can change the password on your Profile page. If, on the other hand, your user account is managed through your company directory, the Change Password link on the Profile page is not available. In this case, manage your password through your company directory (LDAP).

To change your password according to the former scenario:

### Procedure

1. In the navigation menu, hover over your user name, then click **Profile**. Your user profile is displayed.
2. Click **Change Password**. The **Change Password** screen is displayed.
3. In the **Current Password** field, type your old password.
4. In the **New Password** field, type a new password. Click on the information icon to view requirements for new passwords.
5. In the **Confirm Password** field, reenter the new password. The **New Password** and **Confirm Password** fields must match.
6. Click **Save**.



---

## Profile field definitions

The Profile page allows you to define information to display to other QuickFile users.

The following definitions describe the fields on the Profile page:

Field	Definition
Name	Your given name and surname. One hundred characters or fewer. Required.
Title	Your title, role, or position of responsibility at your company. One hundred characters or fewer. Optional.
Company	The name of the company you work for. One hundred characters or fewer. Optional.
Photo	Add a photo to associate with your profile.
Salutation	The term of greeting by which you want to be addressed. One hundred characters or fewer. Optional.
Address	Address information. 4,000 characters or fewer. Optional.
Phone	Phone number to use to contact you. Twenty-five characters or fewer. Optional.
Fax	The fax number to use to send you faxes. Twenty-five characters or fewer. Optional.



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## Chapter 11. About history

You can use IBM QuickFile to view all activities you performed with the application. You must be registered to view history information.

Your history includes the following information:

- Packages you sent
- Packages you received
- Files you downloaded
- How many times you downloaded a package
- When you change an expiration date
- Packages you resent
- Packages you forwarded
- Packages you removed
- File request you sent to an unregistered user
- Files that are archived
- Invitations that you sent to register
- Requests for file you sent

---

### Viewing your activity history

After you perform activities in QuickFile, view your history to see a list of your activities.

#### About this task

With QuickFile, you can view a history of all activities you performed. Access your history from your profile or from the **Options** menu.

To view a history of your activities:

#### Procedure

1. In the navigation menu, hover over your user name and select **History**.
2. To change the number of history items displayed on a page, click one of the values in the **Show** field.
3. To move between pages in the events report, click **Next** or **Previous**.
4. To view the last page of events, click the last number of the **Page** listing.
5. To view the first page of events, click the first number of the **Page** listing.
6. To jump to a specific page, type the page number in the **Jump to page** text box or click the page number in the **Page** listing.

---

## What information is available on the History report?

You can view the History page to view information about the activities you performed in QuickFile.

Refer to the following table to get help with History questions.

<b>File Transfer Questions</b>	<b>Answer</b>
What history information is available for file transfers I receive?	When you receive a file or package from another user, the History page lists the activity as Received, the name of the files or package, the user who sent you the file transfer, the subject name assigned to the file transfer, and the date the file was sent to you.
What history information is available for file transfers I send?	When you send a file or package, the History page lists the activity as Sent, the names of the files, the users to whom you sent the file transfer, the subject name assigned to the file transfer, and the date you sent the transfer.
What history information is available for transactions when I request someone to send a file to me?	When you request someone to send you a file, the History page lists the activity as Requested, the users to whom you sent a request, the subject assigned to the file request, the message sent with the request, and the date you requested the file.
What history information is available for transactions when I invited an unregistered user to register?	When you invite an unregistered user, the History page lists the activity as Invited, the user to whom you sent the invitation, the subject of the invitation, the message included in the invitation, and the date of the invitation.
What history information is available when files or packages are archived?	When QuickFile files are archived, the transactions are listed in history as Archived. Additionally the subject and the date you requested the file transfer are displayed.
What history information is available when I download files or packages?	When you download a file or package, the history report lists the activity as Downloaded, the name of the files or package, the subject name assigned to the file transfer, and the date you downloaded the file or package.
What history information is available when I forward files or packages?	When you forward a file or package, the History page lists the activity as Forwarded, the name of the files or package, the person to whom you forwarded the file or package, the subject of the file transfer, and the date you downloaded the file or package.
What history information is available for file transfers I resend?	When you resend a file or package, the History page lists the activity as Resent, the names of the files, the users to whom you resent the file transfer, the subject name assigned to the file transfer, and the date you resent the transfer.

---

## History field definitions

The History page allows you to view information about the activities you have performed including files you sent, files you received, the users to whom you sent files or who sent files to you, the name of the file transfer, downloads, invitations to register, file deletions, and when the activity occurred.

The following definitions describe the fields on the History page:

Field	Definition
Activity	Name of the event that is described. Events include Received, Sent, Invited, Archived, Downloaded, Forwarded, Resent, or Expiration.
File Name	Lists the name of the package that is sent or received or the name of the files sent or received.
User	Name of the users who received the files, sent the files, were invited to send you a file, or to whom a file was forwarded. For downloaded and archived activities, the user will be your user's Full Name.
Subject	The name of the file transfer. This is defined as the subject in a file transfer transaction.
Message	A message that specifies what information was requested.
Event Date	Date that the activities occurred.



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## Chapter 12. About email notifications

You can use QuickFile to send you email notifications for file transfers you send and receive. You can also be notified when a file you sent or received is about to expire before it has been downloaded.

Email notifications are enabled by default.

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### Disabling email notifications

You can set up QuickFile to send you notifications about file transfers you send and receive. You can also turn off those notifications if they become hard to manage.

#### About this task

By default you are notified by email when a user to whom you have sent a file downloads the file. Likewise, you are notified when you receive a file transfer from someone else. If enabled by the QuickFile administrator, you are notified when a file you sent or received is about to expire before it has been downloaded. Frequent users of QuickFile may prefer to limit these email notifications. Use the User **Options** feature to turn off notifications.

#### Procedure

1. On the navigation menu, hover over your profile name and select **Options**. The Options page opens.
2. Click **Notifications** to expand it.
3. To turn off all email notifications, disable **Enable email notifications**.
4. To turn off email notification when a recipient downloads a file transfer you have sent, disable **Send email notifications to me when recipients download file transfers**.
5. To turn off notification that a file transfer is ready for you to download, disable **Send email notifications when I have a file transfer available to download**.
6. To turn off notification when recipients' file transfers are about to expire, disable **Send email notifications if a transfer I sent is expiring**.
7. To turn off notification that file transfers you were sent are about to expire, disable **Send email notifications if a transfer I received is expiring**.
8. Click **Save**.

---

### Enabling email notifications

When you send a file to another user, you are notified when the user downloads the file. When a user sends you a file, you are notified that it is ready to download. You are also notified when a file you have sent or received is about to expire before being downloaded. If you have turned off notifications, you can turn them on using Options on the navigation menu.

#### Procedure

1. On the navigation menu, hover over your user name and select **Options**. The Options page opens.

2. Click **Notifications** to expand the section.
3. To enable email notifications, check **Enable email notifications**. You can now choose which notifications you want to receive.
4. To be notified when a recipient has downloaded a file transfer you have sent, enable **Send email notifications to me when recipients download file transfers**.
5. To be notified when a file transfer is ready for you to download, enable **Send email notifications when I have a file transfer available to download**.
6. To be notified when file transfers you have sent others are about to expire, enable **Send email notifications if a transfer I sent is expiring**.
7. To be notified that file transfers sent to you are about to expire, enable **Send email notifications if a transfer I received is expiring**.
8. Click **Save**.

---

## Notifications options field definitions

Use the Notifications page to define when you receive notifications. You can receive email notifications when a file transfer is sent to you and is ready to download, when a user to whom you sent a file transfer has downloaded it, when a file transfer sent to you is about to expire, or when a file transfer that you sent is about to expire.

Field Name	Definition
Enable email notifications	Check this option to enable email notifications. To disable this option, click the check box until the check is removed.
Send email notifications to me when recipients download file transfers.	Enable this option if you want to be notified when a user has downloaded a file you sent. To disable this option, click the check box until the check is removed.
Send email notifications when I have a file transfer available to download.	Enable this option if you want to be notified when you receive a file transfer. To disable this option, click the check box until the check is removed.
Send email notifications if a transfer I sent is expiring.	Enable this option to be notified that a file you sent is about to expire before being downloaded. To disable this option, click the check box until the check is removed.
Send email notifications if a transfer I received is expiring.	Enable this option to be notified that a file sent to you is about to expire before you have downloaded it. To disable this option, click the check box until the check is removed.



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