# IBM Aspera Drive Admin Guide 3.1.7

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## Introduction

IBM Aspera Drive is a data transfer client application that you run on your desktop or mobile device, to move files or folders quickly and securely through your Aspera transfer server.

#### Features at a Glance

When Drive is connected to the IBM Aspera on Cloud SaaS platform, you can perform the following tasks:

- Browse the contents of an Aspera on Cloud workspace from the file browser.
- Transfer files and packages from within the same browser view.
- Synchronize local folders with folders on the transfer server, in both directions.

**Note:** You cannot synchronize with an Aspera on Cloud folder if it resides on an *AoCts* (Aspera on Cloud transfer service) node. For AoCts nodes, sync is not supported.

When Drive is connected to an IBM Aspera Faspex transfer server, you can perform the following tasks:

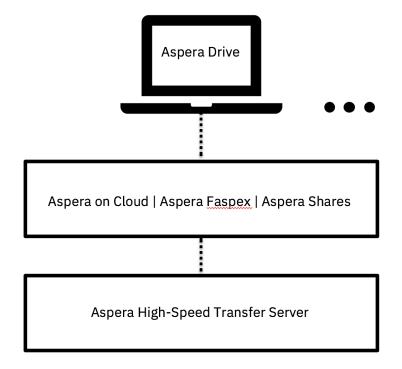
- · Send packages to Faspex users and workgroups.
- Automatically download packages as they are received.
- See into Faspex packages from within the file browser.

When Drive is connected to an IBM Aspera Shares transfer server, you can perform the following tasks:

- Browse and manage the file systems on the transfer server.
- Transfer files and folders to and from the transfer server.
- Synchronize local folders with folders on the transfer server, in both directions.

#### **Basic System Architecture**

Drive is installed on the user's workstation, for any number of workstations in your team's environment.



Drive works with an Aspera web application. In complex environments, it is possible to use more than one of these (for example, both AoC and Faspex).

The HST Server underlies most implementations, and performs the "heavy lifting" of the data transfer. (With Aspera on Cloud, your actual transfers may be performed by cloud infrastructure, rather than by a physical server.)

## Installation

### **Installing Drive**

To install Drive, follow the instructions in this section. To upgrade an existing Drive installation, see Upgrading Drive on page 5.

Before installing Drive, obtain from your system administrator the URL and username/password credentials for at least one transfer server for use with Drive.

1. Download the Drive installer:

#### AsperaDrive-version.msi

2. Install Drive by running AsperaDrive-version.exe. Follow the onscreen instructions.

Note: During installation, the installer closes Windows Explorer.

You can select the checkbox in the setup wizard to start Drive automatically after installation, or you can start it

manually from the Windows Start menu. When Drive is running, the Drive icon 🙆 appears in the system tray.

**3.** To begin using Drive, use the wizard's onscreen instructions to add an account for use with an Aspera transfer server.

For instructions on using the wizard, see the sections in this guide that describe adding and modifying accounts. The Drive functions available to you depend on the type of server you connect to. See

Adding a Drive Account for IBM Aspera on Cloud

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- Adding a Drive Account for IBM Aspera Faspex
  - or
- Adding a Drive Account for IBM Aspera Shares
  - or
- Adding a Drive Account for Cloud Storage

### **Upgrading Drive**

To determine whether Drive updates are available, do the following:

- 1. Check the release notes for information on new features and fixes since your last installation.
- 2. In the Windows system tray, right-click the Drive icon and select Check for updates.
- 3. If a newer release is available, download the Drive installer from the Check for updates link.
- 4. Install Drive by running AsperaDrive-version.exe. Follow the onscreen instructions.

**Note:** The installer closes Windows Explorer, and if it finds a version of Drive already running on your system, it shuts it down.

### **Uninstalling Drive**

To remove the Drive application from your system, do the following:

Note: The uninstallation process closes Windows Explorer.

Either

• Select Start > All Programs > Aspera > Uninstall Aspera Drive.

or

• Select Start > Control Panel > Uninstall a program. Locate Drive in the list of installed programs; right-click it and select Uninstall.

## Working with IBM Aspera on Cloud

### **Drive with Aspera on Cloud**

You can use Drive in conjunction with IBM Aspera on Cloud, a SaaS platform for file transfer and collaboration. When Aspera on Cloud is integrated into Drive, you can do the following:

- See all your Aspera on Cloud workspaces, files, and packages (sent, received, and archived) in a single view in the file browser.
- Share content with members of your organization.
- Send packages to an Aspera on Cloud inbox.
- · See previews of image files.
- Check in and check out files for collaboration with a team.
- Transfer files and folders between your client computer and the server using the Windows Explorer file browser interface, with the following standard Windows Explorer functions:
  - browsing files and folders
  - transferring files to and from your transfer account
  - drag-and-drop <sup>1</sup>
  - creating new folders
  - · copy-and-paste

**Note:** Drive does not currently support adding metadata to packages that it sends. Therefore, ensure that Aspera on Cloud is not configured to have any required metadata fields when sending packages. You can configure optional metadata fields, but Drive will ignore them.

For detailed information on using Aspera on Cloud, see the Help Center within the Aspera on Cloud application.

### Adding a Drive Account for Aspera on Cloud

Use Drive's account setup wizard to configure a new transfer account. Have the following information available before configuring an account:

- The URL of your Aspera on Cloud platform.
- The username and password that you have on Aspera on Cloud.

The steps below assume that you have Drive installed and running.

To add an Aspera on Cloud account to Drive, do the following:

1. Choose one of the following methods to open Drive's Accounts preferences:

<sup>&</sup>lt;sup>1</sup> You may not download an entire shared folder by drag-and-drop. Instead, select contents of the folder to download.

- Right-click the Drive icon  $\boxed{100}$  in the system tray and select **Preferences** > Accounts.
- If you have the Drive Activity window open, select  $\equiv$  > Preferences > Accounts.
- 2. Click + to add a transfer account. The Account Wizard opens.
- 3. Fill in the fields with the following information about the Aspera on Cloud platform:

| Field          | Description  |
|----------------|--|
| Account name   | A name for the account. This name is used only by Drive. |
| Server address | The URL for the server that is running Aspera on Cloud.  |

Click Next.

- 4. On the Authentication screen, with SAML Authentication selected, click Next.
- 5. Enter your Aspera on Cloud credentials:

| Field    | Description                                    |
|----------|--|
| Username | The username that you have on Aspera on Cloud. |
| Password | The password that you have on Aspera on Cloud. |

- 6. If your Aspera on Cloud platform is configured for synchronization, either
  - Set up syncing. To do so, either accept the default directory shown for **Place my files in**, or click **Change** to browse for a different folder (or create a new one).

or

• Click I'd rather not set up file syncing now.

By default, the sync folder is created inside the user's **Documents** folder. The name of the folder is the description text you entered for the account.

For example, the default folder for an account named My Company Server would be the following:

#### C:\Users\username\Documents\My Company Server

If you choose to use the default folder, it is created automatically. If you want to change the sync folder, click **Change** to browse for a different folder or create a new one.

- 7. If you opted to set up syncing on the previous screen, the Account Wizard prompts you to choose folders to sync. You can either
  - Select Synchronize with the selected remote folders and then select the folders on Aspera on Cloud to sync.

Click the arrows to expand or collapse the folder view, and select the check boxes for the folders you want to sync.

Choose the sync direction:

- Two-Way
- Remote to Local (default)
- Local to Remote

or

• Select I'll choose the folders to sync later.

8. Set up package downloading:

• Choose **Automatically download my packages to** and enter or browse to a location where you'd like to store your downloaded packages.

or

- Choose I'd rather not set up automatic downloading now. You can change this setting later if you wish.
- 9. If you opted to set up package downloading in the previous step, now select a timeframe:
  - Choose to download packages from a date in the past.

Select Download my packages from date sent and choose an option from the drop-down:

- Yesterday (default)
- A week ago
- A month ago
- The beginning of time

or

• Choose to download packages from now on.

10. Set up how you will check for new packages:

· Choose Check for new packages and select an automated time interval from the drop-down list.

or

• Choose to check for packages manually.

11. Click Finish to complete your Aspera on Cloud account setup.

### **Checkin/Checkout of Aspera on Cloud Content**

You can use Drive to collaborate across your team, with clear "ownership" while a user is editing a document. With the checkin/checkout feature, users check out a copy of a file, make local changes, and then check in the edited file. While the first user has the file checked out, other users can view but not modify the master copy.

**Note:** The checkin/checkout feature is available in Drive if it has been enabled in Aspera on Cloud at the *organization* level.

#### **Basic Checkin/Checkout Workflow**

With Drive running, do the following:

- In Windows Explorer, navigate to Aspera Drive > AsperaOnCloudAccountName > workspaceName to the file you want to work on.
- 2. Right-click the file and select Check out.

When you do this, Drive downloads a copy of the file to your local computer and places a lock on it, so that others can't edit it until you check it back in.

The file opens in the default application for that file type.

- 3. Edit the file and save your changes.
- 4. Back in Windows Explorer, check in the file. There are two ways to do this:
  - In the Aspera on Cloud location where you checked out from, right-click the file and select Check in.
  - In Aspera Drive > My Checkouts, right-click the file and select Check in.

Note: If My Checkouts does not appear in Explorer, either

• You do not have any files checked out.

or

• You need to refresh the Explorer window.

When you check in the file, Drive uploads your edited copy to the Aspera on Cloud workspace and releases the lock. Now others can see or check out the version with your changes.

#### **Checking Out Files from Within an Application**

In addition to checking out files from Windows Explorer, you can also check out files while you are working in an application (such as Word, Photoshop, Notepad, or any other common application).

To check files out from within an application, do the following:

- 1. Select File > Open.
- 2. Browse to Aspera Drive > account name and navigate to the file you want to work on.
- 3. Click Open.

When you open a file in this way, you are also checking it out through Drive.

#### **Reverting a Checkout**

Once you have checked out a file, you might need to release the lock you hold on it — for example, so that another team member can edit it. Reverting a checkout removes the file lock and deletes your local copy.

**Note:** If you revert a checkout on a file you have edited, *you lose the changes you have made to the file*. In the Aspera on Cloud workspace, Drive restores the version of the file that you checked out.

To revert a checkout, do the following:

- 1. Go to My Checkouts.
- 2. Right-click the checked-out file and select Revert.

Drive alerts you that reverting will discard any changes you have made to the file.

3. Click Yes to finish.

#### **Checkout Versus Open**

*Opening* a file through Drive and *checking it out* look very similar in behavior: in both cases, Drive downloads a local copy to your computer and opens it in the default application. But with checkout, Drive also places a lock on the file so that other users cannot edit it.

If you double-click a file, this opens it but does not check it out. Take care to note the difference in your collaboration workflow.

#### Viewing File Locks

You can use Drive to see who has a particular file checked out from the Aspera on Cloud repository.

Do the following:

- 1. In Windows Explorer, navigate through Aspera on Cloud to the location of the content you want information about.
- 2. Select it.

The entry in Windows Explorer shows you which user has checked out the file.

| 🖉 🗢 🕨 🕨 Aspera Drive    | ▶ fi | lesAccount     Express We | orkspace 🕨 Files  |      |       | ✓  ✓ Searce | h Files |               |
|-------------------------|------|---------------------------|-------------------|------|-------|-------------|---------|---------------|
| Organize 🔻              |      |                           |                   |      |       |             |         | •             |
| Favorites               | •    | Name                      | Date modified     | Size |       | Status      | Owner   |               |
|                         |      | 🕙 file11.rtf              | 6/15/2017 5:45 PM |      | 1 KB  |             |         |               |
| 🐱 Aspera Drive          |      | 🐴 file3.rtf               | 6/17/2017 6:30 PM |      | 1 KB  |             |         |               |
| 🔈 My Checkouts          |      | newFile.txt               | 6/17/2017 5:45 PM |      | 1 K   | Checked out | Me      |               |
| laspexAccount           | =    | newFileWin.txt            | 6/16/2017 4:31 PM |      | 1 KB  |             |         |               |
| lesAccount              |      | screenshot.png            | 6/17/2017 5:46 PM |      | 74 KB |             |         |               |
| ) 2.0.1-DriveWS_1_Tor01 |      |                           |                   |      |       |             |         | Select a file |
| ) 2.0.1-DriveWS_2_Tor01 |      |                           |                   |      |       |             |         | preview.      |
| ) 2.0.1-DriveWS_3_Tor01 |      |                           |                   |      |       |             |         |               |
| ) Express Workspace     |      |                           |                   |      |       |             |         |               |
| 🐌 Files                 |      |                           |                   |      |       |             |         |               |
| Diskages                |      |                           |                   |      |       |             |         |               |
| la sharesAccount        |      |                           |                   |      |       |             |         |               |
|                         | -    | (                         | 111               |      |       |             | •       |               |

### My Checkouts

In the course of your work, it may be easy to lose track of your checkouts, especially if

- You check out a large number of files.
- Your checked-out content comes from several different locations in Aspera on Cloud.
- Some time passes between checking out a file and checking it in.

The most convenient way to keep track of your checked-out content is to use the **My Checkouts** area of Windows Explorer.

To see all of your current checkouts, click My Checkouts.

| Aspera Drive   | My Checke | outs                  |                               | <b>▼ €</b> γ  | Search My Check | outs 🔎                    |
|--|-----------|-----------------------|-------------------------------|---------------|-----------------|---------------------------|
| Organize 🔻   |           |                       |                               |               |                 | - 2                       |
| 🚖 Favorites  | Name      | Path                  |                               | Da            | ate modified    |                           |
|  | 🗎 nev     | wFile.txt /filesAccou | nt/Express Workspace/Files/ne | wFile.txt 6/3 | 17/2017 5:45 PM |                           |
| My Checkouts<br>SaspexAccount<br>SaspexAccount<br>SaspexAccount<br>SaspexAccount | III       |                       |                               |               |                 | Select a file to preview. |
| 试 Libraries<br>🔏 Homegroup   |           |                       |                               |               | 4               |                           |
| 1 item   |           |                       |                               |               |                 |                           |

#### Moving, Renaming, and Deleting Checked-Out Content

You cannot move, rename, or delete a file or its parent folder while you (or any other user) has it checked out. This limitation prevents misalignments in the master repository in Aspera on Cloud.

Instead, you can

- 1. Check the content back in (or revert your checkout).
- 2. Move, rename, or delete the content in Aspera on Cloud, once the file lock has been released. (That is, once the content is not checked out by you or another user.)

#### **Full Paths in My Checkouts**

For convenience, the **My Checkouts** area uses a flat structure (a simple list) to show the content you have checked out.

But you can also see the full path to the content's location in Aspera on Cloud through the **Path** column in Windows Explorer. If the **Path** column is not shown, right-click in the Explorer window and select **View > Details**. If Explorer is already in **View > Details** mode but does not show the **Path** column, refresh the Explorer window.

### **Troubleshooting the Checkin/Checkout Process**

#### How do I find my checked-out content?

To see all of your current checkouts, click My Checkouts.

For more information, see My Checkouts on page 10.

#### How do I open a file someone else has checked out?

If another user has checked out a file, you can *open* it; but keep in mind that the copy you are viewing is local only, and any changes you make to it cannot be committed to the Aspera on Cloud repository.

See Checkout Versus Open on page 9.

#### How do I see who has checked out a file I need?

In Windows Explorer, navigate through Aspera on Cloud to the content you want information about.

See Viewing File Locks on page 9.

#### I can't find the My Checkouts area.

In Windows Explorer, My Checkouts appears as an entry under Aspera Drive if all of the following are true:

- Your Drive installation is of version 3.0.2 or higher.
- You are using Drive with an Aspera on Cloud repository.
- · You have checked out content from the Aspera on Cloud repository.

If all of the above are true, try refreshing the Explorer window:

In the lefthand pane of the Windows Explorer window, right-click Aspera Drive and select Refresh.

#### How do I know where my checkin will go in Aspera on Cloud?

When you check content back in, it returns to the Aspera on Cloud location where you checked it out from.

Also see Full Paths in My Checkouts on page 11.

#### I've reverted a checkout, but the file still appears in My Checkouts.

If you check out a file from one computer, then release the file lock (that is, revert the checkout) from a different computer, the file still appears in the **My Checkouts** area on the computer where you checked it out.

The file in **My Checkouts** is a *local copy* of the file, on the computer where you checked it out. Drive retains this copy because you might have made changes to it that you need to retain. To remove it from the **My Checkouts** area, right-click it and select **Revert**.

## Working with IBM Aspera Faspex

### **Drive with Faspex**

IBM Aspera Faspex is a file-exchange application built on IBM Aspera High-Speed Transfer Server as a centralized transfer solution. With a Web-based GUI, Faspex offers advanced management options for FASP high-speed transfer to match your organization's workflow.

When working with Faspex, you can perform the following tasks:

- Send packages.
- · Receive packages.

Before configuring Faspex to work with Drive, you need the following:

- A computer running the correct version of Faspex. For instructions on how to install Faspex, see the IBM Aspera Faspex documentation.
- Credentials for Faspex user accounts. Users will use these accounts in Drive to connect to Faspex.

### **Configuring Faspex**

To install and configure Faspex, follow the instructions in the IBM Aspera Faspex Admin Guide.

**Note:** Drive does not currently support adding metadata to packages that it sends. Therefore, ensure that Faspex is not configured to have any required metadata fields when sending packages. You can configure optional metadata fields, but Drive will ignore them.

### Adding a Drive Account for Faspex

Use Drive's account setup wizard to configure a new package transfer account. Have the following information available before configuring an account:

- · The address of the server where Faspex is installed and running.
- The username and password that you have on the Faspex server.

The steps below assume that you have Drive installed and running.

To add a Faspex account to Drive, do the following:

- 1. Choose one of the following methods to open Drive's Accounts preferences:
  - Right-click the Drive icon  $\bigwedge$  in the system tray and select **Preferences** > Accounts.
  - If you have the Drive Activity window open, select  $\equiv$  > Preferences > Accounts.
- 2. Click + to add a transfer account. The Account Wizard opens.
- 3. Fill in the fields with the following information about the Faspex transfer server:

| Field          | Description   |
|----------------|---|
| Account name   | A name for the account. The name is used only by Drive. |
| Server address | The URL for the server that is running Faspex.          |

Click Next.

4. Enter your credentials on the transfer server:

| Field    | Description                                      |
|----------|--|
| Username | The username that you have on the Faspex server. |
| Password | The password that you have on the Faspex server. |

Drive then validates the connection.

- 5. If you are prompted to confirm the server's security certificate, indicate whether you trust the server.
- 6. Set up package downloading:
  - Choose Automatically download my packages to and enter or browse to a location where you'd like to store your downloaded Faspex packages.

or

- Choose I'd rather not set up automatic downloading now. You can change this setting later if you wish.
- 7. If you opted to set up package downloading in the previous step, now select a timeframe:
  - Choose to download packages from a date in the past.

Select **Download my packages from date sent** and choose an option from the drop-down:

- Yesterday (default)
- A week ago
- A month ago
- The beginning of time

or

• Choose to download packages from now on.

Click Next.

- 8. Set up how you will check for new packages:
  - Choose Check for new packages and select an automated time interval from the drop-down list.

or

- Choose to check for packages manually.
- 9. Click Finish to complete creating the package transfer account.

### **Modifying a Drive Account for Faspex**

You can modify the following aspects of a package transfer account:

- The local destination directory for downloading received packages.
- How often Drive should look for new packages.
- Whether to overwrite packages that have the same title.
- Whether to automatically decrypt downloaded packages.

The steps below assume that you have Drive installed and running, and that you have created at least one Drive account that you want to modify.

- 1. Choose one of the following methods to open Drive's Accounts preferences:
  - Right-click the Drive icon  $\boxed{0}$  in the system tray and select **Preferences** > Accounts.
  - If you have the Drive Activity dialog open, select  $\equiv$  > Preferences > Accounts.
- 2. On the left side of the dialog, select the transfer server account you want to modify.

3. Under Account, you can change the connection settings for the account:

| Field                                   | Description  |
|---|--|
| Account name                            | The name of the account. The name is used only by Drive.   |
| Server address                          | The URL for the server, and the port number (if applicable).   |
| Username                                | The username that you have on the transfer server.   |
| Password                                | The password that you have on the transfer server.   |
| Do not verify host's SSL<br>certificate | If selected, Drive will bypass the validation of your server's SSL certificate.<br>Select this option if your server's certificate is not valid, but you trust the server. |

4. In the Services area of the tab, click Packages: Settings. The Packages dialog appears.

**5.** Modify the fields as needed:

| Field  | Description  |
|--|--|
| Download received packages to                | Specify the folder where downloaded packages will be saved.  |
|  | You can download packages to the default folder: C:\Users<br>\windowsUsername\Aspera Drive\driveAccountName Inbox, or you can<br>click Change to provide a different folder name.  |
| Overwrite packages that have the same title  | When a received package has the same title as an existing package, Drive<br>can either reuse the same folder (overwriting the existing package), or<br>create a new folder for the received package.   |
|  | If you select this check box, packages with the same name as an already<br>existing downloaded package will be downloaded into the existing folder.<br>If a file being downloaded has the same name as an existing file, that file<br>from the older package is overwritten. |
|  | If you do not select this check box, Drive will create a new folder for the new package, so that the existing one is not overwritten.  |
|  | For example, if you have already downloaded a package with a title of <b>My_Files</b> , and then download another package with the same title, the files will be placed in <b>My_Files(2)</b> .  |
|  | If you select this check box, Drive will place the new package into the existing <b>My_Files</b> folder instead of creating a new <b>My_Files(2)</b> folder. If <b>My_Files</b> already contains a file with the same filename, the existing file will be overwritten.       |
|  | By default, this check box is not selected.  |
| Do not download packages sent<br>by me       | If this check box is selected, packages that you send to yourself or to work groups that you belong to are not downloaded.   |
|  | If this check box is not selected, packages that you send to yourself or to work groups that you belong to are downloaded. (By default, it is not selected.)   |
| Packages are downloaded from                 | Displays the date since which Drive will search for packages to download.  |
| <b>Note:</b> This field is not configurable. | For example, if this field displays <b>05/06/2014</b> , Drive downloads any packages that have arrived since May 6, 2014.  |

| Field   | Description   |
|---|---|
| Check for new packages                              | Select the interval in which to check for newly arrived packages.   |
| Automatically unlock encrypted<br>files on download | If you have configured encryption for your packages, you can set Drive to automatically decrypt them when they are downloaded. To do so, select this checkbox and enter the decryption passphrase in the <b>Passphrase</b> field. |

6. Click OK to apply and save your settings, or click Cancel to cancel your selections.

### Sending Faspex Packages with Drive

- 1. Open the Send Files dialog by doing one of the following:
  - In Windows Explorer, right-click the files or folders you want to send and select Aspera Drive > Send files .
  - If you have the Drive Activity window open, click  $\equiv$  and select Send files.
- 2. In the Send Files dialog, enter the following:

| Field or Button    | Description  |  |
|--------------------|--|--|
| Email or Group     | The recipient of the package (required).   |  |
| Title              | A short, relevant title for the package (required).  |  |
| Notes              | A short message to the recipient of this package.  |  |
| Files              | A list of the files and folders in the package that will be sent.  |  |
|                    | To add items to this list, click <b>Add files</b> or drag and drop from Windows Explorer into this dialog.   |  |
|                    | <b>Note:</b> If the content is a <i>shortcut</i> to a folder, the behavior is different with <b>Add Files</b> versus drag-and-drop: If you use <b>Add Files</b> to add a shortcut to the package, the package contains the folder itself (and its contents). If you use drag-and-drop to add the shortcut to the package, the package contains a shortcut to the folder. |  |
| Encrypt sent files | Select this check box if you want to encrypt files before sending them. When you select <b>Encrypt sent files</b> and click <b>Send Package</b> , you are prompted to enter and confirm a passphrase.  |  |
|                    | When you send encrypted packages, you must provide the recipients with the encryption passphrases so that they can decrypt packages after they receive them.   |  |
| Add files          | Click <b>Add files</b> to add a file or files to the package for transfer. You can also drag and drop from Windows Explorer into this dialog.  |  |
| Add folder         | Click <b>Add folder</b> to add a folder to the package for transfer. You can also drag and drop from Windows Explorer into this dialog.  |  |
| Remove             | To remove an item from the package to be sent, select it in the <b>Files</b> list and click <b>Remove</b> .  |  |

3. Click Send to send the package.

The Drive Activity window's Transfers tab opens to display the progress of the transfer.

### **Receiving Faspex Packages with Drive**

- Getting More Information About a Transferred Package
  - a) Right-click the Drive icon <u>a</u> in the system tray, and select Activity.

- b) Click Transfers to view a list of the recent packages that you have sent or downloaded.
- c) With the buttons in the Transfers tab, you can perform the following additional tasks:

| $\odot$    | Opens the <b>Transfer Monitor</b> for more in-progress detail about the transfer.<br>In the <b>Transfer Monitor</b> , you can adjust the transfer rate (if settings allow). |
|------------|---|
| <i>(</i>   | Opens an Explorer window to the transfer destination folder (the "containing folder").  |
| •          | Stops an in-progress transfer.  |
| lacksquare | Resumes a stopped or suspended transfer.  |

In addition to those actions, you can also right-click a package and select Remove to remove it from the list.

#### • Clearing a Transfer

If a transfer is not currently queued or running, you can remove it from the list:

On the Transfers tab, right-click a transfer in the list and select Remove.

#### • Looking for New Packages

If you have configured Drive to look for new packages at a certain interval, click the **Inboxes** tab to see when Drive will next check for newly arrived packages.

You can also do the following:

• To stop checking for packages, click •.

To resume automatic checking for packages, click  $\mathbf{O}$ .

• To check for packages immediately, right-click an inbox and select Check now.

**Note:** When you click the **Check now** button at the bottom right, Drive checks for new packages for all Faspex accounts in Drive. When you right-click an individual Faspex account and select **Check now**, Drive only checks for new packages for the selected account.

Decrypting Received Packages

If you receive an encrypted package, see Decrypting Packages on page 27.

## Working with IBM Aspera Shares

### **Drive with Shares**

IBM Aspera Shares is a multinode web transfer application that enables organizations to share content with internal and external users.

Drive accounts that are set up with Shares as the transfer server provide the following functions:

- Users can transfer files and folders between their client computer and the server using the Windows Explorer file browser interface, with the following standard Windows Explorer functions:
  - drag-and-drop
  - copy-and-paste
  - · browsing files and folders
  - transferring files to and from your transfer account
  - creating new folders

- You can set up Drive to sync folders automatically on the client computer and on the server whenever contents change. Content changes include
  - modification of file contents
  - · changes in file and folder names
  - creation and deletion of files and folders

The sync feature can be configured to be one-way or bidirectional.

For detailed information on Shares, including system requirements and installation instructions, see see the IBM Aspera Shares documentation

### **Configuring Shares**

Before configuring Shares to work with Drive, you need the following:

- A computer running the correct version of Shares and Enterprise Server.
- On each node on the Shares server, a supported version of Connect Server with a Drive-enabled license.
- Credentials for your users' Shares accounts. Users will enter these account credentials in Drive, to connect to Shares.

**Note:** If you will use the synchronization feature, you must ensure that the Enterprise Server is configured to use token authentication.

- 1. Log in to your Shares instance as administrator, and go to Admin > Accounts > Users.
- 2. For each Shares user account that will use Drive, click Edit.
- **3.** On the **Security** tab, ensure that the **API Login** check box is selected.
- On Shares 1.6 and later versions, this permission is enabled by default whenever new users are created. 4. Create shares, and authorize users for each share.

For detailed instructions on creating shares and authorizing users, see the IBM Aspera Shares Administrator Guide.

5. For each authorized user of a share, enable the following permissions to allow users to view, edit, or delete files and folders when using Drive:

| In Order to Allow This Action on Drive | Enable This Check Box on Shares |
|--|---------------------------------|
| View                                   | browse                          |
|  | download                        |
| Edit                                   | upload                          |
|  | mkdir                           |
|  | rename                          |
| Delete                                 | delete                          |

**Note:** Folders with names that do not follow the proper Windows folder naming conventions do not open in Drive. For details on Windows folder naming conventions, see <u>msdn.microsoft.com</u>.

6. For each Shares user account that will use Drive, repeat these steps.

For more information on Shares, see the Shares Administrator Guide.

### Adding a Drive Account for Shares

To set up a transfer account, make sure you have the following information from the system administrator who manages your Shares transfer server:

- A URL for the Shares transfer server, including a port and path (if applicable).
- A username and password that was set up on your Shares transfer server.

The steps below assume that you have Drive installed and running.

To add a Shares account to Drive, do the following:

- 1. Choose one of the following methods to open Drive's Accounts preferences:
  - Right-click the Drive icon  $\boxed{100}$  in the system tray and select **Preferences** > Accounts.
  - If you have the Drive Activity window open, select => Preferences > Accounts.
- 2. Click + to add a transfer account. The Account Wizard opens.
- 3. Fill in the fields with the following information about the Shares transfer server:

| Field          | Description   |
|----------------|---|
| Account name   | A name for the account. The name is used only by Drive. |
| Server address | The URL for the server that is running Shares.          |

- 4. If you are prompted to confirm the server's security certificate, indicate whether you trust the server.
- 5. Set your Shares server's authentication method:
  - SAML Authentication

If you choose SAML Authentication, log in to the Shares server with this user's SAML credentials.

or

• Basic Authentication

If you choose Basic Authentication, enter the username and password for this user on the Shares server.

- 6. If the transfer server supports synchronization, either
  - Set up syncing. To do so, either accept the default directory shown for **Place my files in**, or click **Change** to browse for a different folder (or create a new one).

or

• Click I'd rather not set up file syncing now.

By default, the sync folder is created inside the user's **Documents** folder. The name of the folder is the description text you entered for the account.

For example, the default folder for an account named My Company Server would be the following:

#### C:\Users\username\Documents\My Company Server

If you choose to use the default folder, it is created automatically. If you want to change the sync folder, click **Change** to browse for a different folder or create a new one.

- 7. If you opted to set up syncing on the previous screen, the Account Wizard prompts you to choose folders to sync. You can either
  - Select Synchronize with the selected remote folders and then select the folders on the server to sync.

Click the arrows to expand or collapse the folder view, and select the check boxes for the folders you want to sync.

Choose the sync direction:

- Two-Way
- **Remote to Local** (default)
- Local to Remote

or

- Select I'll choose the folders to sync later.
- 8. When the screen displays a success message, click Finish to exit the Account Wizard.

### Modifying a Drive Account for Shares

The steps below assume that you have Drive installed and running, and that you have created at least one Drive account that you want to modify.

To modify a transfer account, do the following:

1. Choose one of the following methods to open Drive's Accounts preferences:

- Right-click the Drive icon  $\boxed{100}$  in the system tray and select **Preferences** > Accounts.
- If you have the Drive Activity window open, select  $\equiv$  > Preferences > Accounts.
- 2. On the left side of the dialog, select the transfer server account you want to modify.
- 3. Under Account, you can change the connection settings for the account:

| Field                                   | Description  |
|---|--|
| Account name                            | The name of the account. The name is used only by Drive.   |
| Server address                          | The URL for the server, and the port number (if applicable).   |
| Username                                | The username that you have on the transfer server.   |
| Password                                | The password that you have on the transfer server.   |
| Do not verify host's SSL<br>certificate | If selected, Drive will bypass the validation of your server's SSL certificate.<br>Select this option if your server's certificate is not valid, but you trust the server. |

 If your transfer server supports sync, you can modify sync settings under Services > Settings. The Sync Settings dialog opens.

| Field  | Description  |
|--|--|
| Synchronize with the selected remote folders | Add or remove server folders to sync.                      |
| Local Folder Path                            | Select an alternate sync folder location on your computer. |
| Direction                                    | Select the direction of the sync.                          |

Click **OK** to put into effect any changes you have made.

5. Back in the Preferences dialog, click Save to put into effect any changes you have made.

### **Transferring Content**

Drive is accessible as a location in Windows Explorer. You can use standard Windows Explorer functions for moving and copying files between the server and your local computer.

1. In Windows Explorer, navigate to Aspera Drive. The folders under that entry represent the accounts you have created.

| Aspera Dr           | riuo. N          | - 4 <sub>7</sub> | Search Aspera Driv | •• ×  |
|---------------------|------------------|------------------|--------------------|-------|
|                     |                  | • •              |                    |       |
| Organize 🔻          |                  |                  |                    | ∎ - 0 |
| 🚖 Favorites         | Name             |                  |                    |       |
| \delta Aspera Drive | la filesAccount  |                  |                    |       |
| la sharesAccount    | la sharesAccount |                  |                    |       |
| laspexAccount       | E                |                  |                    |       |
| k filesAccount      |                  |                  |                    |       |
| 🤣 Homegroup         |                  |                  |                    |       |
| iks Computer        | -                |                  |                    |       |
| 3 items             |                  |                  |                    |       |

2. Use standard Windows Explorer functions for browsing through files and folders of each account, transferring files to and from your transfer account, or creating new folders.

**Note:** Depending on your account's permissions on the file transfer server, you might encounter limitations on the following actions on the transfer server:

- browsing
- transfers
- file operations
- context menu options
- **3.** Verify the status of your transfer:

If it is not already open, open the Drive **Activity** window. On the **Transfers** tab, in the list of transferred files and folders, view the status of your transfer.

| ն Activity - Aspera Drive    |            |
|------------------------------|------------|
| 🔆 Transfers 👌 Sync 🛃 Inboxes | ≡          |
| aspera_prereqs.pdf           | •          |
| Done                         | ⊚ @ ⊚      |
| newFile.txt                  |            |
| Done                         |            |
|                              | Clear list |

You can see its status during a transfer, or after it has completed.

The buttons on the Activity window's Transfers tab have the following meanings:

| $\odot$  | Opens the Transfer Monitor for more in-progress detail about the transfer.                          |
|----------|---|
|          | In the <b>Transfer Monitor</b> , you can adjust the transfer rate (if allowed).                     |
| <i>(</i> | Opens a Windows Explorer window to the transfer destination folder (the <i>containing folder</i> ). |

| ullet                      | Stops an in-progess transfer.            |
|----------------------------|--|
| $\textcircled{\textbf{0}}$ | Resumes a stopped or suspended transfer. |

**Note:** If a transfer is reported as complete but the file or folder does not appear in Windows Explorer, refresh the Windows Explorer window.

## Working with IBM Aspera High-Speed Transfer Server

### **Drive with High-Speed Transfer Server**

Aspera High-Speed Transfer Server (HST Server) is the foundation under Drive transfers with Faspex and Shares, and under Drive transfers with AoC if your AoC uses an on-premises (*tethered*) transfer node. Therefore, in any of these cases, the configuration of your HST Server is fundamental to your Drive implementation.

For the most part, your HST Server does not need special configuration in order to work with Drive. You configure your HST Server for use with Drive in the same way as you would for use with Aspera on Cloud, Aspera Faspex, or Aspera Shares.

#### **Setting Group Ownership**

In some cases, you may want to control the permissions on files that are uploaded to a transfer server. To do this, you can set the SGID bit on the directory on the transfer server into which files are transferred.

The steps below set the SGID bit on a directory named **limited**. When the steps are complete, transfers to the **limited** directory will have group ownership rather than user ownership.

**Note:** The change in ownership applies to Drive transfers to this directory, and to files created in this directory on the transfer server itself, but does *not* apply to transfers performed through sync actions.

1. Set the transfer server to ignore group ownership.

```
asconfigurator -x "set_node_data;group_ownership,-"
```

2. Change the group associated with the **limited** directory to **mygroup**. The group named **mygroup** is not the user **xfer**'s primary group.

chgrp -R mygroup limited/

3. Set the SGID bit for the destination directory limited.

```
chmod -R ug=rwx limited/
chmod -R g+s limited/
```

4. Verify your changes.

```
ls -la limited/
drwxrwsr-x 1 root mygroup 1234 Apr 23 10:42 .
```

Your output may vary, but ensure that the s is present in the group's permissions.

## **Synchronization**

### **Understanding Sync**

If you are using Aspera Drive with Aspera on Cloud or Aspera Shares, Drive can synchronize files and folders automatically between the remote server and the local computer.

#### Sync Direction

When you set up sync, you must choose a sync direction. Aspera Drive can be configured for the following direction settings:

#### remote to local

This is the default setting. In this configuration, the remote computer (usually a server) retains the master version of the files. The latest content is copied from the server to users' workstations.

#### local to remote

In this configuration, the user's version of the content is assumed to be the master version, and is copied to a central server. Typically, this setting is employed when users update content frequently.

#### • two-way

In a two-way sync relationship, changes in each location are copied to the other location. With this type of sync, the contents of both remote and local are identical after the sync has been performed.

To avoid unexpected results, understand what each sync direction setting means and choose carefully. For example, consider the following scenario:

The system is configured for remote-to-local sync. When the scheduled automatic sync occurs, the latest content is copied from the remote computer to the user's local desktop. A local user then creates a new file. The next automatic sync occurs, but this new file still exists only on the user's computer. *This is the expected behavior in remote-to-local sync*. In this scenario, the content on the destination is not necessarily identical to that on the source.

#### **Initial Synchronization**

When you first set up a sync relationship between two computers, the system performs its initial transfer of content from the *source* location to the *destination* (or *target*) location. Depending on the size of the body of content, this can be a large operation.

Then, when the system performs the next automatic sync, any changes at the source location are copied to the target.

#### Automatic Sync Versus Reset

#### Automatic Sync

After the initial transfer, synchronization between the transfer server and client computers occurs automatically, at the regular interval you have chosen.

In these automatic sync operations, the system transfers only the changes since the most recent sync.

#### Reset Sync

A reset operation is like starting over. Unlike automatic sync, a reset is a wholesale transfer of *all* the content, not just the changed content. Because a reset clears the sync records, you typically perform a reset only after resolving a conflict or changing the sync configuration.

### Sync with Aspera on Cloud

If you are using Aspera Drive with Aspera on Cloud, Drive can synchronize files and folders automatically between the remote server and the local computer.

**Note:** You cannot synchronize with an Aspera on Cloud folder if it resides on an *AoCts* (Aspera on Cloud transfer service) node. For AoCts nodes, sync is not supported. If you are not sure whether the node you plan to use is an AoCts node, check with the AoC admin for your organization.

Before you begin, ensure that you have the following in place:

• Drive account configuration:

You must have Drive accounts that can synchronize content with your Aspera on Cloud instance.

For more information, see Adding a Drive Account for Aspera on Cloud on page 6.

• Sync configuration in Drive and in Aspera on Cloud:

Pay close attention to the configuration of the sync relationship. In all cases, *the settings in Aspera on Cloud override the settings locally in Drive*. Note that if your Aspera on Cloud transfer server nodes are not correctly configured, you may experience sync problems between Aspera on Cloud and Drive users.

For detailed information, see the IBM Aspera High-Speed Transfer Server documentation.

### Sync with Aspera Shares

If you are using Aspera Drive with a Shares transfer server, Drive can synchronize files and folders automatically between the remote server and the local computer.

Before you begin, ensure that you have the following in place:

Server configuration:

In order to set up sync with a Shares server, the server must be configured for sync in its **aspera.conf** file and must have the appropriate license.

For further information on your server's configuration file and license, see the Admin Guide for your Shares transfer server.

• User permissions in Shares:

Shares users who will use Drive with sync features must be authorized to perform *create*, *delete*, and *rename* file operations. The Shares admin can set these on the **Authorizations** tab.

• Drive account configuration:

You must have Drive accounts that can synchronize content with a Shares server.

For more information, see Adding a Drive Account for Shares on page 17.

• Sync configuration in Drive and in Shares:

Pay close attention to the configuration of the sync relationship. In all cases, *the settings on the Shares server override the settings locally in Drive*. Note that if your Shares server is not correctly configured, you may experience sync problems between the server and Drive users.

For detailed information, see the IBM Aspera High-Speed Transfer Server documentation.

### **Configuring Sync in Drive**

When you use Drive's synchronization capability, you can configure various aspects of the sync relationship. Start by selecting **Preferences > Accounts**.

#### **Selecting Folders to Sync**

In most cases, you will have set up sync folders when you added accounts to Drive. But if you opted not to set up sync with your accounts, or if you need to change the the folders on the transfer server that you want the local computer to sync with, do the following:

- 1. On the Accounts tab, select the account for which you want to configure sync folders.
- 2. In the Services area of the tab, click Sync: Settings. The Sync Settings dialog appears.

**Note:** If sync capabilities are made available for the transfer server *after* the account has been added to Drive, you must remove and then re-add the account to Drive in order to use the **Sync Settings** dialog.

3. Select the folders on the remote server that you would like to sync with the local computer.

Browse through the nested folders shown under **Synchronize with the following remote folders**, and select the ones that should be synced with.

4. Set the local path for the sync.

Under Local Folder Path, the default path on the local computer is shown. If you want to change it, click Browse and navigate to the desired location.

#### **Configuring the Sync Direction**

Drive's synchronization between the remote server and the local computer can be upload-only, download-only, or bidirectional. For a description of these sync direction options and their behavior, see Sync Direction on page 22.

To set the sync direction, do the following:

- 1. On the Accounts tab, select the account for which you want to configure sync direction.
- 2. In the Services area of the tab, click Sync: Settings. The Sync Settings dialog appears.

**Note:** If sync capabilities are made available for the transfer server *after* the account has been added to Drive, you must remove and then re-add the account to Drive in order to use the **Sync Settings** dialog.

3. In the Direction drop-down list, choose Two-Way, Remote to Local, or Local to Remote.

#### **Resetting the Sync**

You can reset the sync at any time; for example when you have changed the sync configuration, or after resolving a sync conflict. When you reset the sync, your sync configuration settings are retained, but the repositories are rescanned for discrepancies. To reset the sync, do the following:

- 1. On the Accounts tab, select the account for which you want to reset the sync.
- 2. In the Services area of the tab, click Sync: Settings. The Sync Settings dialog appears.

**Note:** If sync capabilities are made available for the transfer server *after* the account has been added to Drive, you must remove and then re-add the account to Drive in order to use the **Sync Settings** dialog.

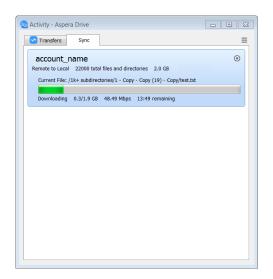
3. Select Reset Sync and click OK.

### **Syncing Content**

#### **Monitoring Sync Status**

You can monitor the status of a sync operation on the Activity Window > Sync tab.

A progress bar shows in-progress synchronizations, and a countdown timer shows when the next synchronization will take place.



#### **Stopping and Starting Sync**

You can stop and resume file syncing with these buttons on the Activity Window > Sync tab:

| Ο       | Stops an in-progress synchronization. |
|---------|---------------------------------------|
| $\odot$ | Resumes a stopped synchronization.    |

#### **Resolving Sync Conflicts**

A sync conflict occurs when the file on one side does not match the file on the other side. Files and folders may not be synchronized for reasons such as insufficient permissions for the destination folder on the local computer.

If a file or folder cannot be synchronized, a conflict warning appears on the Activity Window > Sync tab.

To resolve the conflict, do the following:

- 1. Click the red **conflict** link.
- 2. In the dialog that appears, select the file or folder that is in a conflict state.
- 3. Click Resolve Selected Conflicts.

Drive renames the content on the local file system, appending the phrase **conflict-mine**. For example, the file **log.txt** is renamed as **log.conflict-mine.txt**.

After resolving a sync conflict, you might need to reset the sync. For more information, see #unique\_33/ unique\_33\_Connect\_42\_resetting\_sync.

## **Working with Cloud Implementations**

### Adding a Drive Account for Cloud Storage

To set up a transfer account, make sure you have the following information from the system administrator who manages your transfer server:

- A URL for the transfer server, including a port and path (if applicable).
- A username and password that was set up on your transfer server.

The steps below assume that you have Drive installed and running.

To add a cloud account to Drive, do the following:

- 1. Choose one of the following methods to open Drive and create a transfer account:
  - Right-click the Drive icon  $\boxed{8}$  in the system tray and select **Preferences** > Accounts.
  - If you have the Drive Activity window open, select = > Preferences > Accounts.
- 2. Click + to add a transfer account. The Account Wizard opens.
- 3. Fill in the fields with the following information about the transfer server:

| Field          | Description  |
|----------------|--|
| Account name   | The name of the account. The name is used only by Drive.             |
| Server address | The URL address for the server, and the port number (if applicable). |
| Username       | The username that you have on the transfer server.                   |
| Password       | The password that you have on the transfer server.                   |

#### Click Set up Aspera Drive.

4. Fill in the following information about your cloud storage:

| Field           | Description   |
|-----------------|---|
| Cloud Storage   | The type of cloud storage. Select either <b>Microsoft Azure</b> or <b>Microsoft Azure SAS</b> . |
| Storage account | The account name for the cloud storage you will use.  |
|                 | <b>Note:</b> For Azure SAS accounts, the URL must have been created with full permissions.      |
| Access key      | The alphanumeric key for this storage account.  |
| Path            | The path within the storage that this Drive account should have access to.                      |
| Use page blobs  | Select if your cloud storage uses page blobs.   |

Click Next.

5. When the screen displays a success message, click Finish to exit the Account Wizard.

### Modifying a Drive Account for Cloud Storage

The steps below assume that you have Drive installed and running, and that you have created at least one Drive account that you want to modify.

To modify a cloud account, do the following:

- 1. Choose one of the following methods to open Drive's Accounts preferences:
  - Right-click the Drive icon  $\boxed{\infty}$  in the system tray and select **Preferences** > Accounts.
  - If you have the Drive Activity window open, select  $\equiv$  > Preferences > Accounts.
- 2. On the left side of the dialog, select the transfer server account you want to modify.
- 3. Under Account, you can change the connection settings for the account:

| Field                                   | Description  |  |
|---|--|--|
| Account name                            | The name of the account. The name is used only by Drive.   |  |
| Server address                          | The URL for the server, and the port number (if applicable).   |  |
| Username                                | The username that you have on the transfer server.   |  |
| Password                                | The password that you have on the transfer server.   |  |
| Do not verify host's SSL<br>certificate | If selected, Drive will bypass the validation of your server's SSL certificate.<br>Select this option if your server's certificate is not valid, but you trust the server. |  |

4. In the Storage area, you can configure these aspects of the account:

| Field           | Description  |  |
|-----------------|--|--|
| Storage account | The account name for the cloud storage you will use.                       |  |
| Access key      | The alphanumeric key for this storage account.                             |  |
| Path            | The path within the storage that this Drive account should have access to. |  |

If you make changes to these fields, Drive then verifies that it can still access the storage. If it cannot, you can revert to the previous settings.

5. Click **OK** to put into effect any changes you have made.

## **Working with Aspera Encrypted Files**

### **Decrypting Packages**

Encrypting a file protects it from unwanted access. When an encrypted file arrives after transfer, you must decrypt it before you can use it.

**Note:** Decrypting files requires a *passphrase* — a sequence of text that the sender of the package used to encrypt the package. Before decrypting files, ensure that you have the necessary passphrase.

IBM Aspera Crypt works with Drive to decrypt downloaded files.

To decrypt files you have downloaded, do the following:

- 1. Go to Activity > Transfers and select the encrypted package you want to decrypt.
- 2. Select  $\equiv$  > Unlock encrypted files.

The encrypted files are automatically loaded into Crypt. The Aspera Crypt dialog appears.

**3.** Select a package or browse to the encrypted content.

When the encrypted content is loaded into Crypt, a status message appears at the bottom of the application, displaying the number of items ready for decryption.

4. Type the passphrase into the field and click **Decrypt**.

You can also choose to decrypt the content later.

5. View the output in the Aspera Crypt viewing window.

The decrypted contents appear in the same directory as the original encrypted contents.

If the decrypted file (without the **.aspera-env** extension) already exists in the same folder, "*(decrypted)*" is added to the filename.

If your **Aspera Crypt** viewing window has multiple decrypted items listed, you can use the **View** drop-down list to sort the items by **latest**, **finished**, or **failed**.

#### **Automatic Decryption**

As an alternative to the manual process above, you can set Drive to automatically decrypt the packages that it downloads.

Choose one of the following ways to set up automatic decryption:

- When you create the Drive account for Faspex or Aspera on Cloud, select the option to Automatically unlock encrypted files on download.
- Modify an existing account to enable this option. For instructions, see Modifying a Drive Account for Faspex on page 13.

### **Configuring Your Decryption Settings**

You can adjust the settings that are used when packages are decrypted. In the Crypt window, do the following:

- 1. Click Settings.
- **2.** Configure the following:
  - Delete encrypted files when finished

When this check box is selected, Crypt removes the encrypted files from your system after the destination (decrypted) content has been created.

Number of concurrent threads for decryption

Select the number of threads that are decrypting at any given time. A higher setting means that files will be decrypted more quickly, but this may slow down the rest of your computer while it is running. The options are 1 (default), 2, 4 and 8.

## **Drive Preferences**

### **Setting Your Preferences in Drive**

Through the Preferences dialog, you can set your preferences for the following areas:

- general settings
- accounts
- transfers
- network
- bandwidth

To set your preferences, open the Preferences dialog by doing one of the following:

- With Drive running, right-click the Drive icon <sup>1</sup>/<sub>100</sub> in the system tray and click **Preferences**.
- If you have the Drive Activity window open, select  $\equiv$  > Preferences.

### **General Preferences**

| Field   | Description   |  |
|---|---|--|
| Automatically launch<br>Aspera Drive when<br>Windows starts | Select this check box to automatically launch Drive when you log into your Windows account.   |  |
| Remove transfer list items                                  | Select whether to remove the entry automatically from the transfer view after it h<br>completed, or to manually remove items.<br>Manually is selected by default.   |  |
| Logging Level   | <ul> <li>Choose the level of information to be recorded in the Drive logs. Options are:</li> <li>Info</li> <li>Debug</li> <li>Trace</li> <li>Note: Do not change this setting unless Aspera Technical Support asks you to do so.</li> </ul> |  |

You can set the following preferences at **Preferences > General**:

Click Apply or OK to apply and save your settings, or click Cancel to cancel your selections.

### **Account Preferences**

Select **Preferences > Accounts** to create, configure, modify, and remove accounts.

#### Adding an Account

- For instructions on adding Drive accounts for use with a Shares transfer server, see Adding a Drive Account for Shares on page 17.
- For instructions on adding Drive accounts for use with a Faspex transfer server, see Adding a Drive Account for Faspex on page 12.
- For instructions on adding Drive accounts for use with cloud storage, see Adding a Drive Account for Cloud Storage on page 25.

#### Modifying an Account

- For Shares, see Modifying a Drive Account for Shares on page 19.
- For Faspex, see Modifying a Drive Account for Faspex on page 13.
- For cloud accounts, see Modifying a Drive Account for Cloud Storage on page 26.

#### **Removing an Account**

To remove an account and manage the account's files after removal, do the following:

- 1. In the list of accounts, select an account to be removed.
- 2. Click to remove the account.

When you remove an account, all account transfers and services associated with that account are stopped and removed.

3. Click Yes to confirm the account removal, or click No to cancel the account removal.

#### **Configuring Sync Settings**

For Drive accounts that are set up with Aspera on Cloud or Shares as the transfer server, you can configure synchronization settings, such as which remote folders to sync with, and the direction of the synchronization relationship.

For instructions on setting up and using synchronization features, see Sync with Aspera on Cloud on page 23 and Sync with Aspera Shares on page 23.

#### **Configuring Faspex Account Settings**

For Drive accounts that are set up with Faspex as the transfer server, you can configure the following:

- The local directory for received packages.
- Whether to overwrite packages.
- How often Drive should look for new packages.

For instructions, see Modifying a Drive Account for Faspex on page 13.

### **Transfer Preferences**

Select **Preferences > Transfers** to set your transfer preferences.

1. Configure settings on the **Transfers** tab:

| Field                                 | Description  |  |
|---------------------------------------|--|--|
| Enable queuing                        | When this check box is selected, Drive limits the number of concurrent transfers to the number specified in the <b>Maximum concurrent transfers</b> field.       |  |
|                                       | Any transfers above this value are queued and then started once the number of concurrent transfers drops below the specified value.                              |  |
|                                       | <b>Note:</b> When transfers are queued, you can start them manually from the <b>Activity &gt; Transfers</b> window.  |  |
| Maximum concurrent<br>transfers       | If queuing is enabled, you can enter a maximum number of concurrent transfers in this field.   |  |
|                                       | By default, a maximum of three concurrent transfers are allowed.   |  |
|                                       | When queuing is not enabled, this field is not available.  |  |
| Automatically retry failed            | When this check box is selected, Drive retries failed transfers.   |  |
| transfers<br>• Attempts<br>• Interval | It will make the specified number of retry <b>Attempts</b> in a specified time <b>Interval</b> .   |  |
|                                       | If you want Drive to retry failed transfers, specify the number of attempts and<br>the interval in which Drive will try to resend in seconds, minutes, or hours. |  |
|                                       | By default, this feature is enabled, with three retry attempts and at 30-second intervals.   |  |
| Sync: Interval                        | Specify the interval between synchronizations for each account that has the sync feature enabled.  |  |
|                                       | By default, synchronizations are set for 30-second intervals.  |  |

2. Click Apply or OK to apply and save your settings, or click Cancel to cancel your selections.

### **Network Preferences**

Select **Preferences > Network** to set your network preferences.

1. In the HTTP Proxy area, set the following preferences:

| Field                                       | Description  |  |
|---|--|--|
| Obtain proxy configuration from             | Select whether to obtain the proxy configuration from the system, or to provide a manual proxy configuration.  |  |
|   | By default, System is selected.  |  |
|   | <b>Note:</b> If you select <b>System</b> and your system settings have changed since you last used system proxy configurations with Drive, you must restart Drive. |  |
|   | If you select <b>Manual</b> , the Use HTTP Proxy fields become available. See below for a description of these fields.   |  |
| Use HTTP Proxy <ul> <li>Username</li> </ul> | If you selected <b>Manual</b> from the previous drop-down list, use these fields to define your proxy configuration. Type the following information:               |  |
| Password                                    | • your username  |  |
| Address and Port                            | <ul><li>your password</li><li>your server's URL or IP address, and port number</li></ul>   |  |
|   | Note: For some proxies, username and password are optional.  |  |

2. If you will use a FASP proxy for your transfers, set the following preferences in the dialog's FASP Proxy area:

| Field  | Description  |  |
|--|--|--|
| Use FASP Proxy (DNAT)  | If your transfers will use an IBM Aspera FASP Proxy server, select this check box.   |  |
| Secure (DNATS)   | Select this check box if your FASP Proxy uses a secure connection.   |  |
| <ul> <li>Username</li> <li>Password</li> <li>Address and Port</li> </ul> | <ul> <li>Use these fields to define your FASP Proxy configuration. Type the following information:</li> <li>your server username</li> <li>your server password</li> <li>your server's URL or IP address, and port number</li> <li>Note: These fields are enabled only if Use FASP Proxy (DNAT) is selected.</li> </ul> |  |

3. Click Apply or OK to apply and save your settings, or click Cancel to cancel your selections.

### **Bandwidth Preferences**

Transfer speeds depend on server settings and your network connectivity. To limit transfer rates, go to **Preferences > Bandwidth**.

Take care to click Apply or OK to make your settings take effect.

#### **Manual Versus Automatic Transfers**

The limits you set on the **Bandwidth** tab can be different for transfers that are initiated *manually* versus those that are *automatically* triggered. Automatic transfers can include sync-initiated transfers, script-initiated transfers, or any other kind of background method of starting a Drive transfer.

| Area                   | Field Name                        | Description   |
|------------------------|-----------------------------------|---|
| Manual<br>Transfers    | Downloads: Limit to               | When the <b>Limit to</b> check box is selected, you can set the download rate in either megabits per second (Mbps) or kilobits per second (Kbps). |
|                        |                                   | The limit you set here will apply to downloads that users initiate manually.  |
|                        | Uploads: Limit to                 | When the <b>Limit to</b> check box is selected, you can set the upload rate in either megabits per second (Mbps) or kilobits per second (Kbps).   |
|                        |                                   | The limit you set here will apply to uploads that users initiate manually.  |
| Automatic<br>Transfers | Background downloads:<br>Limit to | When the <b>Limit to</b> check box is selected, you can set the download rate in either megabits per second (Mbps) or kilobits per second (Kbps). |
|                        |                                   | The limit you set here will apply to downloads that are initiated programmatically.   |
|                        | Background uploads:<br>Limit to   | When the <b>Limit to</b> check box is selected, you can set the upload rate in either megabits per second (Mbps) or kilobits per second (Kbps).   |
|                        |                                   | The limit you set here will apply to uploads that are initiated programmatically.   |

#### Settings

## Troubleshooting

#### Where do I find Drive log files?

In the system tray, right-click the Drive icon  $\triangle$  and select **Open log folder**. Or, if the **Activity** window is open, select  $\equiv$  > **Open log folder**.

Alternatively, you can go to C:\Users\username\AppData\Local\Aspera\Aspera Drive\var\log.

#### How can I reduce the bandwidth that Drive uses?

You can limit the number of concurrent transfers in **Preferences > Transfers**. You can also limit the amount of bandwidth used by each transfer in **Preferences > Bandwidth**. For details, see Transfer Preferences on page 30 and #unique\_50.

# The system sent me an email notifying me that I've received a package. Why can't I download the package through my Web browser?

To download transferred packages through a Web browser, you must have the IBM Aspera Connect application installed on your local computer.

Go to downloads.asperasoft.com/connect2/ and install Connect so that your browser can download packages from the transfer server.

For more information, see the IBM Aspera Connect User's Guide.

#### I'm using Drive with a Shares server, but I don't see a way to configure my sync settings.

It may be that Drive needs to re-load sync information for that Shares server or node.

To address this, do the following:

#### 1. Go to **Preferences > Accounts**.

- **2.** Remove the account.
- 3. Add the account again so that Drive recognizes the sync capabilities.

The Services area should now appear on the Accounts tab.

#### I'm using SAML authentication, and am having trouble logging in.

When you quit out of Drive and then restart, the system needs to re-authenticate you with the server. So enter your SAML credentials again when you restart Drive.

#### Syncing with multiple folders

When your Drive installation is configured with a local-to-remote sync, Drive does not recreate all subfolders of the selected remote sync directory on the local computer. This is the default behavior, intended to reduce confusion since you are not interacting with the subfolders.

If you want to sync into the subfolders, make sure to select them individually (effectively setting up multiple sync relationships).

#### How can I view thumbnails of video files?

While you can see a preview of image files, and many other file types, in the file browser, Drive does not support video previews.