

IBM **Aspera Faspex User Guide 4.3.1**

All Platforms

Revision:847 Generated:10/09/2019 15:08

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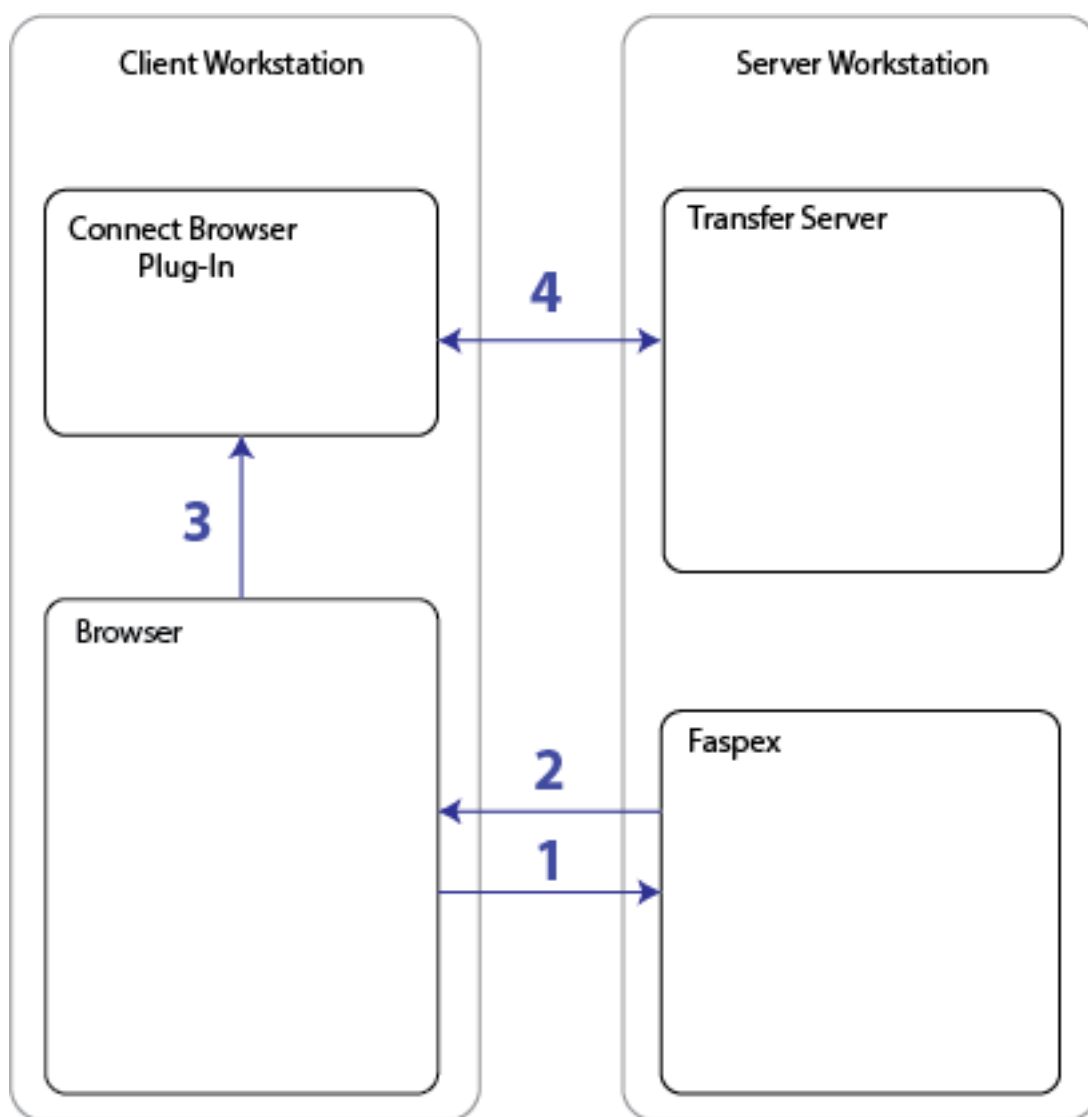
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Introduction

IBM Aspera Faspex is a file exchange application built upon IBM Aspera High-Speed Transfer Server as a centralized transfer solution. With a web-based graphical user interface, Faspex offers more advanced management options for *fasp* high-speed transfer to match your organization's workflow. Faspex offers the following file-exchange and management features:

Feature	Description
Web/Email-based Interface	Simple web and email interface for exchanging files and directories.
Package Forwarding	Enable users to forward file packages on the server to others (without re-uploading).
Permission Management	Manage user permissions through workgroup/dropbox assignment or direct configuration.
Post-Processing	Execute custom scripts after a transfer when certain conditions are met.
Email Notification	Create customizable email notifications of Faspex events (such as receiving a package).
Directory Service	Seamlessly integrate your organization's Directory Service users and groups.

The following diagram illustrates how Faspex handles file transfers:



1. A user accesses the Faspex website through a web browser.
2. At this point, Faspex checks that IBM Aspera Connect is installed and up-to-date. If it is not, Faspex automatically prompts the user to download the latest version. Faspex also returns the transfer server's file list or an upload page based on the user's request.
3. When the user selects a file for download or upload, transfer information is passed to Connect.
4. Connect establishes a connection with the transfer server and begins transferring the files.

Logging In to Faspex

Logging In to Faspex

1. Open a supported browser and enter the Faspex hostname or IP address followed by **/aspera/faspex** in the browser URL. For example:

`http://faspex.asperasoft.com/aspera/faspex`

or

`http://198.51.100.24/aspera/faspex`

2. Log in with your credentials.

If SAML configurations are available, you can choose to log in with a configured SAML provider or with your Faspex user credentials.

If your administrator configured Faspex to use a default SAML configuration, Faspex automatically redirects you to the SAML login page. Login with your SAML credentials or login locally by bypassing the redirect.

If you need to login with your Faspex user credentials or if you need to log in using another SAML configuration, you can bypass the redirect by adding `login?local=true` to the end of the URL. For example:

<https://192.51.100.24/aspera/faspex/login?local=true>.

3. If you are logging in for the first time, you are prompted to change your password and then asked to login with the new password.

If you incorrectly enter your password too many times, Faspex locks your account. If enabled, you can select the **Forgot password** link from the login page to request a password reset email from Faspex. Once you reset your password, you can log into your account again.

If you do not receive an email, contact your admin to reactivate your account.

4. If prompted, install IBM Aspera Connect.

You must have the latest version of Connect installed to transfer packages using Faspex. Faspex prompts you to install the Connect Browser if you do not have it installed or if your version is not the latest. If you install Connect, refresh your browser to start using Connect.

For more information, see [Faspex and Connect](#) on page 7.

If you do not have access to IBM Aspera Faspex, you can register a new account by clicking **Request an Account**.

Note: If you do not see the **Request an Account** link, your administrator did not enable self-registration.

For more information, see [Requesting an Account](#) on page 7.

Logging In with SAML

If SAML configurations are available, you can choose to log in with a configured SAML provider.

1. Open a supported browser and enter the Faspex hostname or IP address followed by `/aspera/faspex` in the browser URL. For example:

`http://faspex.asperasoft.com/aspera/faspex`

or

`http://198.51.100.24/aspera/faspex`

2. Log in with your credentials.

If SAML configurations are available, you can choose to log in with a configured SAML provider or with your Faspex user credentials.

If your administrator configured Faspex to use a default SAML configuration, Faspex automatically redirects you to the SAML login page. Login with your SAML credentials or login locally by bypassing the redirect.

If you need to login with your Faspex user credentials or if you need to log in using another SAML configuration, you can bypass the redirect by adding `login?local=true` to the end of the URL. For example:

<https://192.51.100.24/aspera/faspex/login?local=true>.

3. If prompted, install IBM Aspera Connect.

You must have the latest version of Connect installed to transfer packages using Faspex. Faspex prompts you to install the Connect Browser if you do not have it installed or if your version is not the latest. If you install Connect, refresh your browser to start using Connect.

For more information, see [Faspex and Connect](#) on page 7.

Requesting an Account

If you do not have an account and Faspex is configured to allow users to self-register, the login page displays the **Request an Account** link. If you do not see this link, contact your admin.

1. Click the **Request an Account** link to request access to Faspex.
2. After clicking on this link, complete the following form and click the **Request an account** button.

Note: Faspex can be configured to force external users to register a Faspex account to download packages sent to them. If you are requesting an account in order to download a package, your login and email are automatically set to the external address.

3. Once you receive your account confirmation email, enter your user credentials and click **Login**.
4. If prompted, install IBM Aspera Connect.

You must have the latest version of Connect installed to transfer packages using Faspex. Faspex prompts you to install the Connect Browser if you do not have it installed or if your version is not the latest. If you install Connect, refresh your browser to start using Connect.

For more information, see [Faspex and Connect](#) on page 7.

Transferring Files

Faspex and Connect

Transfers initiated in the IBM Aspera Faspex web application are conducted using the IBM Aspera Connect Browser Plug-in. The Connect Plug-In is an install-on-demand web browser plug-in that facilitates high-speed uploads and downloads with an Aspera transfer server.

The Connect Install Dialog

When a user first logs in, Faspex checks if Connect has been installed on their browser. If they have an outdated version or do not have the plug-in installed, Faspex prompts the users to download and install the plug-in.

Clicking **Download latest version** connects the user to Aspera's CloudFront CDN from which they can download the Connect installer.

Transfers with HTTP Gateway [BETA] Service

If the HTTP Gateway [BETA] Service is installed, you can choose to use the HTTP Gateway service to make HTTP transfers with Faspex. Aspera recommends using the HTTP Gateway service only if installing and using Connect is not an option; using Connect ensures high-speed, stable, and secure transfers.

To use HTTP Gateway instead of Connect, close the Connect install dialog and click **OK** when the browser prompts, "Are you sure you want to forgo using IBM Aspera Connect?"

The browser responds with the following message:

"IBM Aspera Connect has been disabled, and you will no longer be prompted to install it. You can re-enable Connect on the account settings page."

At any point, you can re-enable Connect by clicking the **Enable IBM Aspera Connect** button in the menu bar, or by going to your account preferences, clearing the **Disable Aspera Connect plug-in** option, and clicking **Update preferences**.

For more information about transferring with HTTP Gateway, see [HTTP Gateway \[BETA\] Service](#) on page 13.

Note: If the service is not installed, Faspex does not give you the option to disable Connect.

Sending a New Package

When a local transfer is initiated, IBM Aspera Faspex prompts IBM Aspera Connect to start a session. You must allow the Connect to run in order to send packages with Faspex.

Note: Remote transfers do not prompt the Connect.

1. Go to **New Package**.


Note: If the **New Package** button opens a drop-down menu, choose **Normal Package**. Other options send packages to your dropboxes. For more information about dropboxes, see [Working with Dropboxes](#) on page 20.

2. Specify package recipients in the following fields:

Enter the package recipients on the **To** line. A recipient can be any one of the following:

- A Faspex account name.
- The email address of an external user (if this is permitted for your account).
- A workgroup name, which begins with an asterisk (*).
- A name of a distribution list.

Note: Valid delimiters when entering multiple recipients are commas (,) and semi-colons (;).

You can also add recipients from your contact list by clicking the  button. The contact list shows the Faspex users, workgroups, and distribution lists you can access.

If you are permitted to send packages to external email addresses, Faspex saves the external email address to your contact list when you send files to a new address. To remove an email address from your contact list, go to **Account > Edit Contacts**.

Note: For recipient fields, Faspex automatically converts email address to existing Faspex users with the corresponding email addresses. For more information, see [Package Recipient Expansion by Email Address](#) on page 11.

3. If you want to send packages as a BCC (blind carbon-copy), click **Show Private Recipients** and enter Faspex account names, external email addresses (if allowed), or distribution lists in the **To (private)** field.
4. Specify recipients of CC notifications in the following fields:

Option	Description
CC Upload	<p>You can notify others when packages are uploaded by enabling this field and entering Faspex account names or email addresses.</p> <p>You cannot enter workgroups in these fields. To hide CC options, click Hide CC.</p>
CC Download	<p>You can notify others when packages are downloaded by enabling this field and entering Faspex account names or email addresses.</p> <p>You cannot enter workgroups in these fields. To hide CC options, click Hide CC.</p>
CC Receipt	<p>If your account has Allow editing of receipt addresses on package creation enabled, you can add Faspex users or email address to the CC Receipt list. These users and email addresses receive the same notifications as the package sender regarding this transfer.</p>

Option	Description
	If an admin has included CC Receipt recipients for your account, the CC Receipt field is auto-populated with those accounts and emails. If allowed to edit, you can modify that list.

Note: Valid delimiters when entering multiple recipients are commas (,) and semi-colons (;).

5. Enter a package title.

6. Fill out custom metadata fields added by the admin.

Faspex allows the admin to add custom metadata fields to the New Package form. You may see additional required or optional text fields if your admin configured custom metadata fields.

7. Schedule package delivery by selecting a **Release Policy** option.

Faspex users can specify when uploaded packages are delivered. External submitters do not have this option. The following three policies are available:

- **Release Now:** Deliver the package as soon as it is uploaded (default).
- **Release Later - Set Date Now:** Delay delivery and set a delivery time. Click in the **Release Date** text box to open the date and time setting popup.
- **Release Later - Set Date Later:** Delay delivery and set a delivery time later. Packages that are created with this option are listed in **Pending Packages** with the option to **Set now** under **Send Date**.

Delayed delivery can be used to stagger package delivery, moderating the load on the Faspex server if there are many recipients, or to prepare the package but wait to deliver until the desired release date.

Packages that are created with a **Release Later** option are listed on the **Pending** page. The send date or **Set now** is listed in the **Send Date** column. You can edit the send date by clicking on it. For more information, see [Managing Pending Packages](#) on page 10.

8. If enabled by an admin, and if you want to secure your packages, enable the encryption-at-rest feature for this transfer.

Select **Use encryption-at-rest** to encrypt the package's contents on the server. If enabled, recipients are required to decrypt the package with a password to access its contents.

9. If enabled by an admin, set package expirations for the package.

Select from one of the following auto-deletion rules:

- **Do nothing:** Do not auto-delete after the package is downloaded.
- **Delete files after any recipient downloads all files:** Delete after *any* recipient downloads *all* files in the package once.

Important: When this option is selected, a forwarded package can be potentially deleted before the original recipient has downloaded it. Thus, proceed with caution when selecting this option.

- **Delete files after all recipients download all files:** Delete if *all* files in the package have been downloaded by *all* recipients.

10. Select your content source if your Faspex account is allowed to create packages from remote sources.

Select your content source from the **Source** drop-down list. For example, select whether to create a package from files on your local computer, another computer, or cloud storage.

Important: Outside submitters are not be able to create packages from remote sources.

11. Select content to include in your package.

- Browse for files: Upload specified files to Faspex.
- Browse for folders: Upload specified folders to Faspex.
- Drag-and-drop: Drag files and folders to the browser to upload files. ¹

¹ The drag-and-drop capability is not supported on some platforms.

12. Click **Send Package** when you are finished.

Depending on your Package Storage settings, file packages sent from Faspex are either stored on the server for a specified duration or until they are manually deleted. You can find your sent packages by going to the tab **Sent** in the Faspex menu.

Managing Pending Packages

When package delivery is delayed, you can view pending packages on the **Pending** page of the Faspex UI.

Pending Packages [View Full History](#)

Recipients	Title	Send Date	Upload Date	Size	Files	Status	Action
jason@aspera.com	Revisions you requested	Jun 28	3:52 PM	4.2 MB	1	Complete	Archive Delete
jason@aspera.com	Proofs 6-16-2017	Set Now	3:48 PM	5.7 MB	2	Complete	Archive Delete

Edit or Set the Send Date

To update or set the package date, click the link in **Title** or **Send Date** column. In the **Send Date** field, click **Edit** to set or edit the send date, or **Release Now** to send the package immediately.

Delete a Pending Package

If you decide you do not want to send a package and want to delete it, click **Delete** to completely remove the package and its contents from the Faspex server.

Viewing and Downloading Packages


1. View your received packages.

- Download a package you received: Go to **Received**.
- Download a package you sent: Go to **Sent**.

2. Optional: Sort your packages.

In the packages list, you can click the header bar links to sort your packages. For example, when clicking **Sender**, all packages are sorted alphabetically by sender's name.

3.

Click the  button to download a package.

Faspex prompts the IBM Aspera Connect to start a session. When the Confirm window appears, click **Allow** to begin.

Note: When downloading an encrypted package, the Connect prompts the user for a passphrase. The Connect also prompts for a passphrase if the package contains any **.aspera-env** files within the folder hierarchy, even if the package also contains unencrypted files or files encrypted with different passphrases. If you choose to keep downloaded files encrypted, you do not need to enter a password until you attempt to decrypt the files locally.

Package Recipient Expansion by Email Address

Faspex automatically converts email addresses in recipient fields to existing Faspex users associated with the same email addresses. If there are multiple users associated with an email address, the address expands to all matching users. If a user exists whose username is the entered email address, the email address is not expanded and the package or notification is sent to that user only.

Faspex expands emails in the following fields:

- New package To field
- New package CC Upload field
- New package CC Download field
- New package CC Recipients field
- Distribution lists Contacts field

Package Recipient Expansion with External users

When creating a new package, if the sender enters an email address in the To field, Faspex detects whether there are existing Faspex users associated with the entered email and handles entered email addresses in one of the following ways:

- If there are existing users, the To field suggestions drop-down is auto-populated with the Faspex users that the sender has permissions to send to.
- If there are no existing users or the sender does not have permissions to send to any existing users, the To field does not display any suggestions. If the sender sends to the email address anyway, Faspex notifies that the sender does not have adequate permissions.
- If there are no existing Faspex users share the email address and the sender is allowed to send to external email addresses, Faspex automatically creates a new external user with the email address.

If you explicitly append (**external**) to an entered email address (for example, `faspex_user@example.com(external)`), Faspex does not check for the associated users and transfers the package to the external email address.

Package Details

You can view details for any sent or received package on the Package Details page. To open the Package Details page:

- Go to **Received** and click on a package name.
- Go to **Sent** and click on a package name.
- Go to **Workgroups**, select your workgroup or dropbox, and click on a package name.

Note: If you do not see the **Workgroups** tab, you do not have access to any workgroups or dropboxes.

The Package Details page displays the following information:

A ↓ Package - File Type Comparison [Return to List](#) [Forward](#) **B**

From: admin
To: asp1, asp2
Cc (on download): admin,
Date sent: 10/28/15 11:31 AM
D Company Name: Aspera
Note:

C Package Details
Status: Complete
Size: 93.7 KB
Files: 1
Upload stats:
Elapsed: less than 5 seconds
Average rate: 7.1 Mbps
Full Package Downloads: 0
Partial Package Downloads: 0
Active Downloads: 0
[More Details](#)

E Browse and Download Contents or [Download Entire Package](#)

Path: / PKG - File Type Comparison

Name	Size
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> jpeg-n-png-123-photo.jpg	93.7 KB

Download selected Select: [All](#) , [None](#)

Item	Name	Description
A	Download Icon	Click the icon to download the complete package.
B	Forward	If package forwarding is permitted for your account, click the link to forward this package.
C	Package Details	The package's information and download activity.
D	Package Note and Metadata	The package's note and metadata, if any.
E	Browse and Download Contents	Navigate into folders in this package, or select folders and files to download.

Serving Connect Locally

You may want to host your own IBM Aspera Connect SDK for your applications rather than having the downloads served from Aspera's CloudFront CDN. This also enables you to make users download the Connect plug-in from a server of your choice.

Note: If you choose to locally serve connect, you must manually update your Connect plug-in version to support the latest Faspex features. Different versions of Faspex require a different minimum version of the Connect plug-in. You can check the minimum Connect plug-in version of your Faspex by going to **Server > Transfer Options** and looking under Aspera Connect Version.

1. Download the Connect SDK zip file from the [Aspera Developer Network](#) and unzip the folder into a temporary location.
2. Create this folder:
3. Extract the Connect SDK to the `connect` folder.
4. In the Faspex UI, go to **Server > Configuration > Transfer Options** and select **Locally host Connect**.

HTTP Gateway [BETA] Service

Note: If the administrator did not install the HTTP Gateway [BETA] service, you are unable to use HTTP Gateway Service and cannot see the options described below.

The HTTP Gateway [BETA] service allows you to send and download packages from Faspex without using IBM Aspera Connect. Since this service is still in beta, Aspera recommends users use Connect for high-speed transfers and HTTP fallback transfers instead of HTTP Gateway. The HTTP Gateway service should be used in situations in which users need to send and download packages without using Connect.

Instead of initiating a direct *fasp* transfer session with IBM Connect, the HTTP Gateway service communicates with the browser to perform HTTP uploads and downloads to transfer files from the Faspex node to the user's server. Transfers do not take advantage of Aspera transport technology and transfer speeds are dependent on your network situation.

The workflow for sending and downloading packages using the HTTP Gateway service is nearly identical to sending and downloading packages with Connect. The sections below highlight the key differences.

Sending Packages

When sending a new package, the HTTP Gateway service allows you to upload multiple files with two restrictions:

1. You can upload multiple files, but you cannot upload folders.
2. Faspex limits the number of packages you can upload at a time to ten (10) files.

Just like in transfers using Connect, files uploaded through HTTP Gateway are stored on the Faspex server for recipients to download.

If the Faspex server does not have valid SSL certificates installed, you need to open port 4001 on your browser by accessing HTTP Gateway through the server. Enter the Faspex hostname or IP address followed by `:4001` in the browser URL. For example: `http://faspex.example.com:4001`. The browser displays the following message:

"Successfully connected to the Aspera HTTP Gateway service! Plugin-less HTTP fallback upload and downloads should work from this client machine's browser now. Be sure to mark this page as an exception with the browser so that future accesses to it will not require seeing a warning page again."

Downloading Files

When viewing lists of packages on the **Received** or **Sent** pages, Faspex displays the following warning to the right of each title:

"Warning: You are currently using low speed HTTP. To enable high speed transfers with Aspera, please visit User Preferences to enable/download the Connect browser plugin."



Warning: Do not navigate away from the page until you successfully download your files. If you leave the page before the download is completed, the download does not complete. When you initiate a download, Faspex displays the following message: "Ongoing downloads will be aborted if you navigate away from this page." This warning disappears when the download is complete.

Note: Since the HTTP Gateway service transfers files through the browser, it starts a new HTTP session for each individual file. If your browser is configured to prompt you each time it initiates a download, and you choose to download twenty files, the browser prompts you twenty times, once for each file.

Limitations with Faspex Reporting

When a user downloads a package with two or more files using the HTTP Gateway service, Faspex reports the package as partially downloaded. If package storage expiration options relying on package download confirmation were enabled for the package, Faspex does not count the partial download as download confirmation and will not

delete the files. An admin must manually delete the files. The two specific package expiration options this limitation affects are:

- **Delete files after any recipient downloads all files**
- **Delete files after all recipients download all files**

Tip: If a downloaded package has only one file, Faspex correctly reports the package as downloaded.

Defaulting to HTTP Gateway Service

To use the HTTP Gateway service and disable the Connect dialogue, go to your account preferences, enable the **Disable Aspera Connect plug-in** option, and click **Update preferences**.

Configuring Account Preferences

Updating Personal Account Preferences

Click the profile icon in the banner and select **Account** from the drop-down menu to update your Faspex account preferences, including email address, notification options, maximum listed rows, and password.

- **Preferences:** Change preferences for your email address, notifications, table rows, and IBM Aspera Connect prompts.
- **Change Password:** Change your Faspex account password.
- **Edit Contacts:** Delete external email addresses and other contacts that have been added to your contacts list.
- **Edit Distribution Lists:** Create and edit distribution lists for package recipients.

Preferences

Email Settings

Option	Description
E-mail	Enter your email address to receive electronic notifications from Faspex. Admins have the ability to disable users from changing their email addresses.
Upload notifications	If you would like to be notified (via email) after you have uploaded a package successfully, select Upload notification and input your faspex account. Notify additional users from your contacts list by clicking the + button.
Download notifications	If you would like to be notified (via email) after recipients download your package successfully, select this feature and enter your faspex account. Notify additional users from your contacts list by clicking the + button.
Email me when I receive a package	Select to be notified when new packages are received.
Email me when I download a package	Select to be notified when new packages are downloaded.
Include me in workgroup notifications for packages I send	Select to be notified when a workgroup receives your package(s).
Disable Aspera Connect plugin	Prevent Faspex from checking for and using IBM Aspera Connect. When Connect is disabled, Faspex uses the HTTP Gateway service instead.
Max rows per page	Enter the number of rows to display for pages with lists of users, packages, or groups.

Misc

Option	Description
Max rows per page	For a package or an account list, set how many rows are displayed per page.
Enable public URL	<p>Note: This field and checkbox does not appear if (1) Public URLs are disabled server-wide or (2) Public URLs have been disabled for this particular user.</p> <p>A public URL allows external senders to submit packages to registered users and dropboxes. External senders no longer need to be individually invited to submit a package, although that functionality still exists. For more information, see Enabling and Sharing your Public URL on page 23.</p> <p>You can enable or disable the Enable public URL feature for your account, as long as Public URLs are allowed by your admin.</p>

Change Password

Option	Description
Old Password	Enter your current password.
New Password	Enter a new password. Based on your Faspex Server settings, this password may need to be a <i>strong</i> password that contains at least six characters (with a minimum of one letter, one number and one symbol).
Password Confirmation	Confirm your new password and click Change Password .

Edit Contacts

If you are permitted to send packages to external email addresses, and you have sent files to a new email address, Faspex automatically saves the recipient in your contact list. If your account has also been configured with **Keep user directory private** set to **Yes**, each recipient of your packages and each sender to you is automatically added to your contact list. To remove external email addresses from your contact list, click the **Remove** link.

Edit Distribution Lists

When you select **Edit Distribution Lists**, Faspex lists your existing distribution lists, if any, and gives you the choice of editing the existing lists or creating a new list.

To create a new list, click the **Add New Distribution List** link.

For **Name**, enter a name for your distribution list. For **Contacts**, click



to open a list of user and workgroup names to choose from.

Important:

- Do not choose a name for your distribution list that is the same as a member user or workgroup name.
- A package cannot be sent if any recipient in the distribution list is an invalid user. If a user is external and sending to external users is disabled, the external user would be considered invalid, regardless of whether the email address is active.

To modify or delete a distribution list, go to **Account > Edit Distribution Lists**. In addition to allowing you to add a new distribution list, this shows your existing lists and allow you to change list names, add or remove contacts, or delete the list altogether.

Creating a Personal Distribution List

You can configure personal distribution lists to send packages to a list of email addresses and Faspex users. Each distribution list consists of a comma-separated list of email addresses or Faspex usernames. The items in the list are not validated until you try to send a package to the list.

Faspex lists your existing distribution lists on the Edit Distribution Lists page (**Account > Edit Distribution Lists**) and presents the choice of editing existing lists, duplicating a global list, or creating a new list. You cannot edit global distribution lists from this page, but you can duplicate the list and then edit the duplicated list.

1. Go to **Account > Edit Distribution Lists** and create a new distribution list.

- Create a new distribution list by clicking **Add New Distribution List**.
- Duplicate an existing global list by clicking the **Duplicate** link for the global list.

Note: If a global distribution list has the same name as a personal distribution list, the personal list takes precedence over the global list if the user enters that name when sending a package.

2. Name the distribution list.

Important: Do not choose a name for your distribution list that is the same as a member user or workgroup name.

3. Enter up to 50 contacts. Contacts can be email addresses or Faspex usernames.

You cannot send packages to a distribution list if any recipient in the list is an invalid user. For example, if a user is an external user and the option to send to external users is disabled, the external user is considered invalid and package sending fails.

If the admin enables the **Ignore invalid recipients** option, package sending does not fail even if the list contains an invalid user. Faspex skips any invalid user and delivers the package to all valid recipients in the list.

Note: To send explicitly to external users, you must append **(external)** to the email address (or Faspex automatically expands the email to existing Faspex users or creates a Faspex user for the email. For example, to send to **faspex_user@example.com**, add **faspex_user@example.com (external)** to the distribution list. For more information on email expansion, see [Package Recipient Expansion by Email Address](#) on page 11.

You can enter email addresses in three ways.

- Type email addresses or Faspex usernames into the Contacts field.
- Click the (plus) button to import contacts from your Faspex contacts list.
- Click the **Browse** button to import contacts from the chosen CSV file.

Note: The CSV file must include a single column containing only email addresses to properly import contacts.

4. Click **Create**.

After creating a distribution list, the list appears on the Editing Distribution Lists page. You can edit the name and contacts list, or import contacts by clicking **Import Contacts from CSV**. After making changes, click **Update Distribution Lists** to save the changes. You can also delete distribution lists by clicking the **Delete** link for the list.

Global Distribution Lists

Name	Contacts	
Advent Video	james@adventvp.com, madison@adventvp.com, m, sara@adventvp.com,	Duplicate

Personal Distribution Lists [Add New Distribution List](#)

Name	Contacts	
Animators	jen@adventvp.com, boyu@adventvp.com, collin@adventvp.com	<input type="button" value="Import Contacts From CSV"/> Delete

Check Data Usage and Sender Quota Limit

If sender quotas are enabled, you can check your sender quota limit and the amount of data you've sent in your personal preferences.

Click the profile icon in the banner and select **Account** from the drop-down menu. Go to **Sender Quota**.

The page shows your remaining available data in the current rolling period and the quota limit set for your account. When the remaining available data drops to zero, you cannot send packages until the rolling period expires and your available data is reset.

Working with Workgroups

Workgroups define a group of users that can be sent packages as a collective whole. A Faspex administrator determines who has permissions to send packages to a workgroup and where those packages are stored. The administrator also determines whether members can see and send packages to other workgroup members.

Sending Packages to a Workgroup

If you are an IBM Aspera Faspex workgroup member and have been assigned the proper permissions, follow the steps below to send a package to the workgroup.

1. Select **New Package** and select the dropbox you wish to send a package to from the drop-down menu.


Selecting **Normal Package** takes you to the New Package form. For more information on sending a normal package, see [Sending a New Package](#) on page 8.

Note: If the New Package button does not open a drop-down menu, you do not have permission to send to any dropboxes. If you don't see the **New Package** button at all, your account does not have permission to send users or to dropboxes.

2. Specify package recipients.

Enter your package recipients. Workgroup names are preceded by an asterisk (*).



You can also choose recipients from your contact list. To view your contact list, click the  button. The contact list shows your Faspex users, workgroups, and distribution lists. If you are permitted to send packages to external email addresses, Faspex also saves the email address to your contact list when you send files to a new address. To remove an email address from your contact list, go to **Account > Edit Contacts**.

3. If you want to send packages as a BCC (blind carbon-copy), click **Show Private Recipients** and enter Faspex account names, external email addresses (if allowed), or distribution lists in the **To (private)** field.
4. Specify recipients of CC notifications in the following fields:

Option	Description
CC Upload	You can notify others when packages are uploaded by enabling this field and entering Faspex account names or email addresses. You cannot enter workgroups in these fields. To hide CC options, click Hide CC .
CC Download	You can notify others when packages are downloaded by enabling this field and entering Faspex account names or email addresses. You cannot enter workgroups in these fields. To hide CC options, click Hide CC .
CC Receipt	If your account has Allow editing of receipt addresses on package creation enabled, you can add Faspex users or email address to the CC Receipt list. These users and email addresses receive the same notifications as the package sender regarding this transfer. If an admin has included CC Receipt recipients for your account, the CC Receipt field is auto-populated with those accounts and emails. If allowed to edit, you can modify that list.

Note: Valid delimiters when entering multiple recipients are commas (,) and semi-colons (;).

5. Enter a package title.
6. Fill out custom metadata fields added by the admin.
Faspex allows the admin to add custom metadata fields to the New Package form. You may see additional required or optional text fields if your admin configured custom metadata fields.
7. If enabled by an admin, and if you want to secure your packages, enable the encryption-at-rest feature for this transfer.

Select **Use encryption-at-rest** to encrypt the package's contents on the server. If enabled, recipients are required to decrypt the package with a password to access its contents.

8. Select your content source if your Faspex account is allowed to create packages from remote sources.

Select your content source from the **Source** drop-down list. For example, select whether to create a package from files on your local computer, another computer, or cloud storage.

Important: Outside submitters are not be able to create packages from remote sources.

9. Select content to include in your package.


- Browse for files: Upload specified files to Faspex.
- Browse for folders: Upload specified folders to Faspex.
- Drag-and-drop: Drag files and folders to the browser to upload files.²

10. Click **Send Package** when you are finished.

Downloading Packages for Workgroup

If you are a member of an IBM Aspera Faspex Workgroup, you can download file packages that have been sent to your Workgroup from the **Workgroups** tab.

Downloading a Package

To download a package, click  or click the package name to advance to its Details page.

From the Details page, you can either browse and download individual files, or click the **Download Entire Package** link to download the entire package.

Once you have initiated the download, you are asked to confirm your download directory. Faspex prompts IBM Aspera Connect to start a session. When the Confirm window appears, click **Allow** to begin.

Archiving Old Packages

You can shorten the downloaded packages list by moving packages into archive. To archive a package, click the **Archive** link within the under the Actions column. To view archived packages, click the **View Full History** link.

Note: Only global admins and workgroup admins can archive packages. Regular workgroup members cannot archive packages.

Archiving Packages in a Workgroup Inbox

Archive packages to clean up the workgroup inbox or to hide specific packages from view.

Go to **Workgroups** > *workgroup_name* and click the **Archive** link for the package you want to hide.

² The drag-and-drop capability is not supported on some platforms.

Working with Dropboxes

Faspex Dropboxes

Dropboxes provide a file submission system that users can drop their packages into. dropbox members can submit files as well as view them. Admins can also invite external users (people who don't have a Faspex account) to submit to a dropbox.

Faspex users submit files to a dropbox they have membership in by selecting the dropbox from the **New Package** drop-down. However, users don't necessarily have to be a member or even a Faspex user to submit to a dropbox.

Admins can invite external users to submit to a dropbox using an emailed, private link. Admins can also distribute a public URL that allows those who access it to obtain a private link to the dropbox submission page.

Users can view submitted files on the **Workgroup** page.

Common Uses

dropboxes can be used to:

- Allow file submission for various projects and business processes with different, required metadata for each.
- Allow outside users to drop packages in file submission areas without having full access to Faspex.

Sending Packages to a Dropbox

If you are a member of a dropbox and have the proper permissions, follow the steps below to send a package to a dropbox.

1. Select **New Package** and select the dropbox you wish to send a package to from the drop-down menu.

Selecting **Normal Package** takes you to the New Package form. For more information on sending a normal package, see [Sending a New Package](#) on page 8.

Note: If the New Package button does not open a drop-down menu, you do not have permission to send to any dropboxes. If you don't see the **New Package** button at all, your account does not have permission to send users or to dropboxes.

Note: You do not have access to the **To** and **To (private)** fields, because you are sending to a designated dropbox.

2. Specify recipients of CC notifications in the following fields:

Option	Description
CC Upload	<p>You can notify others when packages are uploaded by enabling this field and entering Faspex account names or email addresses.</p> <p>You cannot enter workgroups in these fields. To hide CC options, click Hide CC.</p>
CC Download	<p>You can notify others when packages are downloaded by enabling this field and entering Faspex account names or email addresses.</p> <p>You cannot enter workgroups in these fields. To hide CC options, click Hide CC.</p>

Option	Description
CC Receipt	<p>If your account has Allow editing of receipt addresses on package creation enabled, you can add Faspex users or email address to the CC Receipt list. These users and email addresses receive the same notifications as the package sender regarding this transfer.</p> <p>If an admin has included CC Receipt recipients for your account, the CC Receipt field is auto-populated with those accounts and emails. If allowed to edit, you can modify that list.</p>


Note: Valid delimiters when entering multiple recipients are commas (,) and semi-colons (;).

3. Enter a package title.
4. Fill out custom metadata fields added by the admin.
Faspex allows the admin to add custom metadata fields to the New Package form. You may see additional required or optional text fields if your admin configured custom metadata fields.
5. If enabled by an admin, and if you want to secure your packages, enable the encryption-at-rest feature for this transfer.
Select **Use encryption-at-rest** to encrypt the package's contents on the server. If enabled, recipients are required to decrypt the package with a password to access its contents.
6. Select your content source if your Faspex account is allowed to create packages from remote sources.
Select your content source from the **Source** drop-down list. For example, select whether to create a package from files on your local computer, another computer, or cloud storage.
Important: Outside submitters are not be able to create packages from remote sources.
7. Select content to include in your package.
 - Browse for files: Upload specified files to Faspex.
 - Browse for folders: Upload specified folders to Faspex.
 - Drag-and-drop: Drag files and folders to the browser to upload files.³
8. Click **Send Package** when you are finished.

Downloading Packages for Dropbox

If you are a member of an IBM Aspera Faspex Dropbox, you can download file packages that have been sent to your Dropbox from the **Workgroups** tab.

Downloading a Package

To download a package, click  or click the package name to advance to its Details page.

From the Details page, you can either browse and download individual files, or click the **Download Entire Package** link to download the entire package.

Once you have initiated the download, you are asked to confirm your download directory. Faspex prompts IBM Aspera Connect to start a session. When the Confirm window appears, click **Allow** to begin.

³ The drag-and-drop capability is not supported on some platforms.

Archiving and Deleting Old Packages

You can shorten the downloaded packages list by moving packages into archive. To archive a package, click the **Archive** link within the under the Actions column. To view archived packages, click the **View Full History** link.

You can also delete a package by clicking the **Delete** link.

Note: Only global admins and dropbox admins can archive and delete packages. Regular dropbox members cannot archive packages.

Inviting an Outside Contributor to Send to Dropbox

If you someone to upload files to Faspex without a user account, you can invite them to send their packages to a dropbox as an outside submitter. Outside submitters can submit files to the dropbox using a submission link, but they cannot view files in the dropbox.

When outside submitters are invited to access a dropbox, they are not prevented from sharing the upload link with others. Faspex records the IP address used to submit packages, but Faspex cannot verify that the person using the link is the intended contributor. If this is a concern, set a custom link expiration policy for the invitation link. the submission link expires after one successful upload completion or the submission link expires on a specific date. In the case of expiration after the completion of a successful upload, it *is* possible for an outside submitter to initiate parallel uploads using a single link to submit multiple packages.

1. Go to **Workgroups** and select your dropbox.
2. Select **Invite Outside Submitter**.
3. Enter the external email address of the invited submitter.
4. Write a description that is included in the email invitation.
5. Select **Custom invitation link expiration policy** submission link expiration options:
 - a) To set time-based link expiration, select **Invitation link expires** and set the number of days Faspex keeps the link available.
 - b) To set download-based link expiration, select **After one successful upload**. The link expires after an outside submitters uploads one package.



Warning: When outside submitters are invited to access a dropbox, they are not prevented from sharing the upload link with others. Faspex records the IP address used to submit packages, but Faspex cannot verify that the person using the link is the intended contributor. If this is a concern to your organization, you can identify one of two security options when sending an invitation to an outside submitter: the submission link expires after one successful upload completion or the submission link expires on a specific date. In the case of expiration after the completion of a successful upload, it *is* possible for an outside submitter to initiate parallel uploads using a single link to submit multiple packages.

6. Click **Save** to send an invitation email to the email address with the submission link.

You can configure your invitation email by modifying the email template.

Note: After inviting an outside submitter, you can view the upload access URL or resend the invitation. Go to **Workgroups** and select your dropbox. Select **View Members**. Find the outside contributor in the members list and select either **see access URL** or **resend invitation**.

Working with External Senders

Inviting External Senders

The following steps assume an admin has configured Faspex to allow inviting external senders (users who do not have Faspex accounts).

1. Go to **Received** and click the **Invitations** link.
2. Click on **New** to send an invitation.
3. Enter the outside sender's email address
4. If you want to offer further information or further instruction, enter a description.
5. Choose a link expiration policy. If you do not enable **Custom link expiration policy**, Faspex uses the server default link expiration setting.

The submission link expiration options include the following:

- **After one upload:** Delete the submission link after one successful upload
- **After 3 days:** Delete the submission link on a specific date (which you need to input)

You can enable both features. The link expires whenever either of the conditions are met.

6. Click **Save**.
Faspex sends the external user an email with a submission link. The external user can upload a package to Faspex from that link.

You can view all your invitations by going back to **Received > Invitations**.

Here, you can perform the following operations:

- You can **Resend** the submission link email.
- You can **Delete** the invitation, which removes the sender from this list and prevents them from using the submission link.
- You can see the URL submission link that was sent to the user.

Enabling and Sharing your Public URL

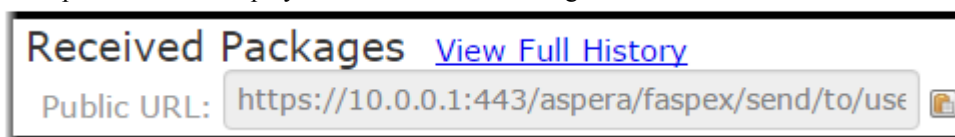
A public URL allows external senders to submit packages to registered users and dropboxes. When a public URL is enabled and shared to an external sender, the external sender can take the following actions to send a package.


1. The external sender clicks the shared Public URL.
2. The sender is directed to a page and asked to enter an email address.
3. A private link is automatically emailed to the sender.
4. The sender clicks the private link and is automatically redirected to a package submission page.
5. Once the package is submitted through the private link, the user can download the package by going to **Received**.

The following describes how to enable a public link on your account. An admin must first enable the Public URL feature for your account or for the server. For more information, contact your system admin.

1. Click the **Account** link next to your username.
2. Go to the Misc section on the Preferences page and select **Enable public URL**.
3. Click **Update preferences**.
4. Go to **Received**.

Your public URL is displayed under Received Packages.



5. Click the  button to copy the public URL to your clipboard.
6. Send the public URL to the external sender.

Removing External Users from Faspex

Whenever a user sends to an external user, Faspex saves the external user's email address to the database.

1. Go to **Accounts > External Users**.
2. Select the users you want to delete.
3. Select **Remove** from the **Actions** drop-down menu.
4. Confirm and click **OK**.

Appendix

Bypassing the SAML Redirect

If Faspex has been configured with a default SAML IdP for authentication, Faspex automatically redirects you to the SAML login page of the default SAML IdP. If you need to authenticate with a different SAML IdP, you can access the correct IdP through the methods below.

Logging In to a SAML IdP from the Local Login Page

To bypass the automatic redirect and go to the local login page, add `login?local=true` to the end of the Faspex url. For example:

```
https://198.51.100.48/aspera/faspex/login?local=true
```

On the local login page, you can choose to log in with the SAML IdPs an admin has chosen to display on the local login page.

Accessing a SAML IdP Using a Domain URL

Admins can configure a domain URL for a SAML IdP, which users can access to authenticate to Faspex with the corresponding IdP. If an admin has configured a domain URL for your IdP, you can follow that URL to authenticate with that IdP. need to access a SAML IdP that is not the default IdP, you can use domain URLs to directly access a SAML configuration. Contact your admin for more information and go to the domain URL once it is provided by your admin.

Technical Support

Support Websites

For an overview of IBM Aspera Support services, go to <https://asperasoft.com/company/support/>.

To view product announcements, webinars, and knowledgebase articles, as well as access the Aspera Support Community Forum, sign into the IBM Aspera Support site at <https://www.ibm.com/mysupport/> using your IBMid (not your company Aspera credentials), or set up a new account. Search for Aspera and select the product. Click **Follow** to receive notifications when new knowledgebase articles are available.

Personalized Support

You may contact an Aspera support technician 24 hours a day, 7 days a week, through the following methods, with a guaranteed 4-hour response time.

Phone (North America)	+1 (510) 849-2386, option 2
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Phone (Europe)	+44 (0) 207-993-6653 option 2
Phone (Singapore)	+81 (0) 3-4578-9357 option 2

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