IBM Aspera Faspex 4.4

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Faspex User Guide

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Introduction

Faspex is a file exchange application built on 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:
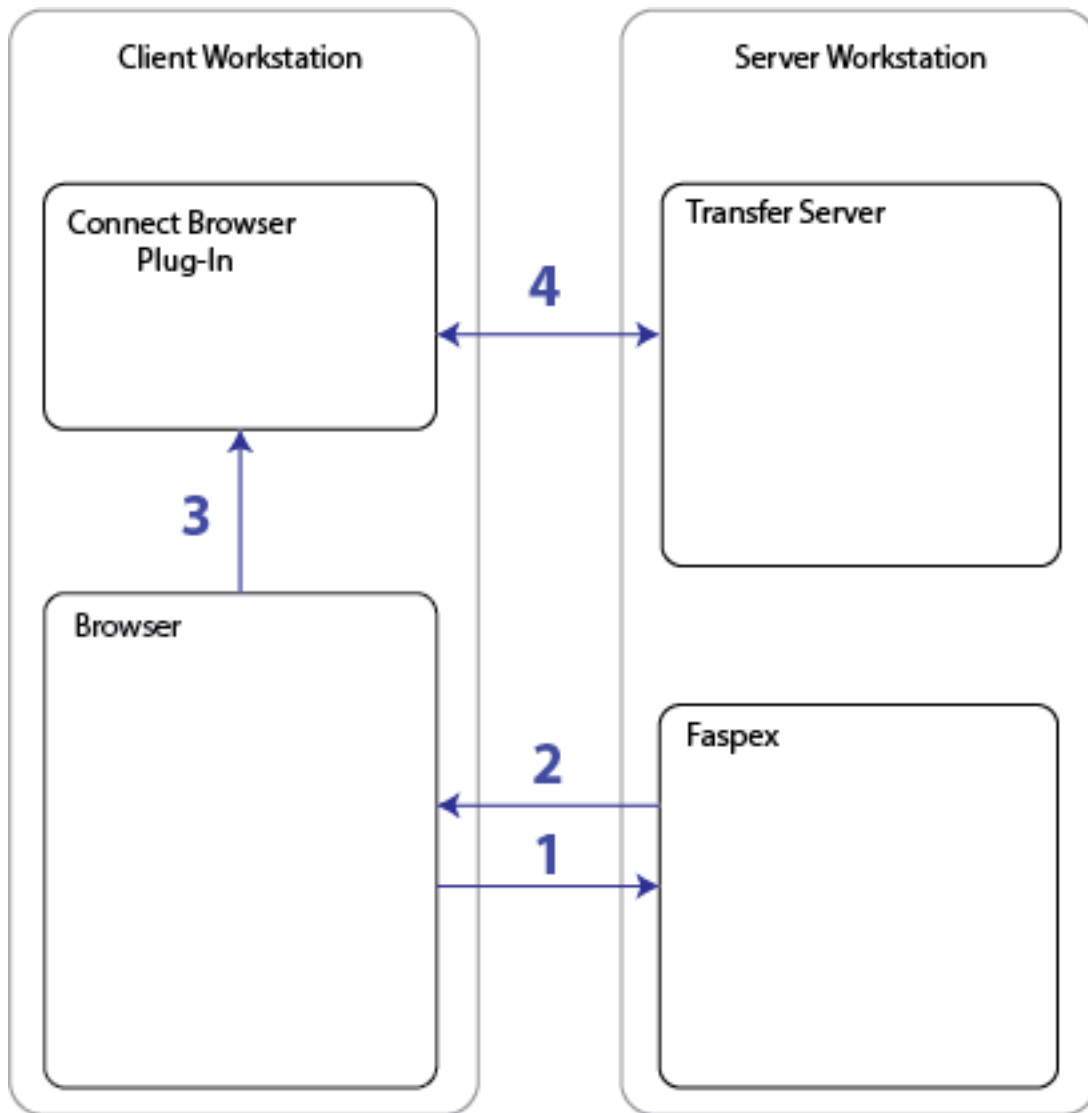
1. A user accesses the Faspex website through a web browser.

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 displays the HST 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 HST 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.ibmaspera.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 9.

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 enabled self-registration.

For more information, see "Requesting an Account" on page 4.

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.ibmaspera.com/aspera/faspex
   ```

   or

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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 9.

Requesting an Account

If you do not have an account and Faspex is configured to allows users to self-register, the login page displays the **Request an Account** link.

Note: 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 9.

Using Faspex with the HTTP Gateway Service

The HTTP Gateway is a service that allows a client to download files from and upload files to a HSTS node without using IBM Aspera Connect. If configured, Faspex users can choose to use HTTP Gateway instead of Connect for transfers.

Using HTTP Gateway Instead of IBM Aspera Connect

Use HTTP Gateway instead of Connect to transfer files.

Note: If HTTP Gateway is not enabled, you cannot choose to disable Connect.

1. Go to your account.
2. Select **Disable Aspera Connect plugin**.
3. Click **Update preferences**.

Limitations

HTTP Gateway-based transfers are limited by the same limitations of HTTP/HTTPS transfers and the native download manager of the client's web-browser.

General Limitations

- Since uploads and downloads leverage HTTP/HTTPS between the web browser and HTTP Gateway, the transfer performance depends on the performance of HTTP/HTTPS, which can be affected by distance between clients and servers, and by other network-related issues. For this reason, IBM Aspera highly recommends following best practice by deploying HTTP Gateway as close as possible to end users.
- Empty (0-byte) files are not supported for uploads and downloads.
- HTTP Gateway does not support resuming transfers.

Download Limitations

When downloading more than one file, HTTP Gateway bundles the files in-memory. Bundling the files allows end users to download multiple files at once as one archive. Bundling the files also allows preserving a directory structure in the archive.

The total size of the archive cannot be communicated to the web browser, because files are bundled and transferred in-memory. Therefore, the download manager cannot show progress based on the total size.

Upload Limitations

- Since web browsers do not have an upload manager, IBM Aspera provides an upload mechanism through a JavaScript SDK. The upload mechanism allows sending multiple files as chunks, allowing the web page implementing the SDK to send large amounts of data. Because the web page sends the chunked data in the background, the user must stay on the same web page until the upload finishes.

  Note: You can find the JavaScript SDK documentation on the IBM Developer website.

- HTTP Gateway supports uploading only files and not directories.

Configuring Account Preferences

Click the profile icon in the top-right of the banner and select **Account** from the drop-down menu. You can change your Faspex account preferences including language, notification options, and password. You can also manage your contacts and distribution lists.

Using HTTP Gateway Instead of IBM Aspera Connect

Use HTTP Gateway instead of Connect to transfer files.

Note: If HTTP Gateway is not enabled, you cannot choose to disable Connect.

1. Go to your account.
2. Select **Disable Aspera Connect plugin**.
3. Click **Update preferences**.

Updating Email and Connect Settings

Click the profile icon in the banner and select **Account** from the drop-down menu and go to **Preferences** to update your Faspex email preferences and Connect settings.

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 packages.

Misc

Option	Description
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	For a package or an account list, set how many rows are displayed per page.
Enable public URL	**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. 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 20. You can enable or disable the **Enable public URL** feature for your account, as long as Public URLs are allowed by your admin.

Changing Your Language

Change your default language to another supported language.

How Faspex determines on a user-to-user basis the language to use for the web UI:
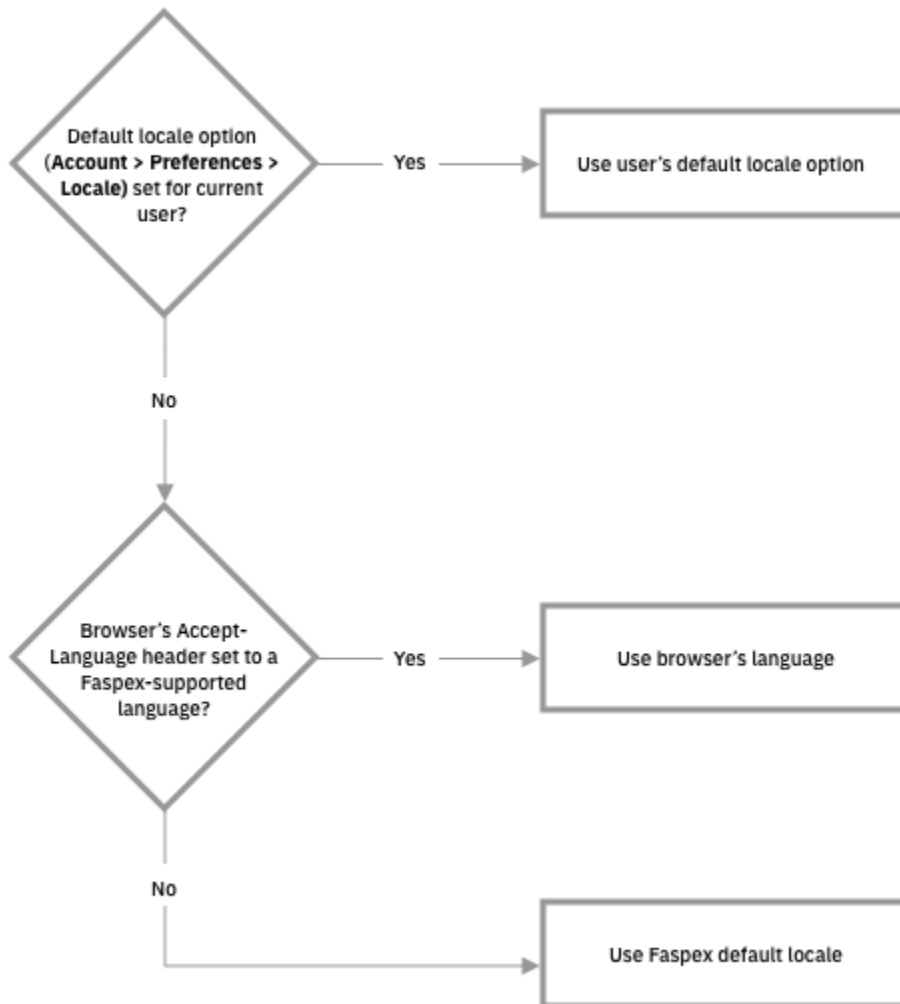
1. Click the profile icon in the top-right of the banner and select **Account** from the drop-down menu.
2. Under **Locale**, select your language from the drop-down menu.
3. Click **Update Preferences**.

Changing Your Password

Change your account password.

1. Click the profile icon in the top-right of the banner and select **Account** from the drop-down menu.
2. Go to the **Change Password** tab.
3. Enter your current password in the **Old Password** field.
4. Enter and confirm a new password.

   By default, the requirement is a strong password that contains at least six characters (with a minimum of one letter, one number and one symbol).
5. Click **Change Password**.

Editing Contacts

Whenever you send packages to an external email address, Faspex automatically saves the email address 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 that sends a package to your account is automatically added to your contact list.

To remove contacts:

1. Click the profile icon in the top-right of the banner and select **Account** from the drop-down menu.
2. Go to the **Edit Contacts** tab.
3. Click the **Remove** link for each contact you want to remove.

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.

On the Edit Distribution Lists page, you can create, edit, or delete personal distribution lists. Although you cannot edit global distribution lists, you can duplicate the list and then edit the duplicated list.

To create a new list:

1. Click the profile icon in the top-right of the banner and select **Account** from the drop-down menu.
2. Go to the **Edit Distribution Lists** tab.
3. Click **Add New Distribution List** or **Duplicate** a global list.
4. Name the distribution list.

   Do not give your personal distribution list the same name as a user account or workgroup name.

   Do not give your personal distribution list same name as a global distribution list, unless you want Faspex to use personal list instead of the global list when sending a package.

5. Enter up to 50 contacts. You can:

   - Type email addresses or Faspex usernames into the Contacts field.

   - Click <kbd>+</kbd> to import contacts from your Faspex contacts list.

   - Click the **Browse** button to upload contacts from a CSV file.

     Note: The CSV file must include a single column containing only email addresses.

   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 13.

   The items in the list are not validated until you try to send a package to the list.

6. 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.

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.

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 Service

You can choose to use the HTTP Gateway service instead of Connect to make transfers using Faspex. For more information about transferring with HTTP Gateway, see "Using HTTP Gateway Instead of IBM Aspera Connect" on page 4.

The Activity Window

In the Activity window, you can view and manage all transfer sessions.

The Activity window contains the following controls:

- ⊗ Open the Transfer Monitor. For more information on this feature, see Monitoring Transfers.
- ⊘ Open the folder on your computer that contains this content.
- ⊙ Stop the transfer.
- ⊙ Resume a stopped transfer, or retry a failed transfer.

When the queuing option is enabled, the number of concurrent transfers is limited. The additional transfers are queued in the Activity window and initiated when a transfer is finished. You can manually start a queued transfer by clicking the ⊙ button. You can also right-click on a started or stopped transfer to access various controls. The example below shows the right-click options for a stopped transfer.

Monitoring Transfers

Connect lets you monitor and adjust file transfer speed from the Transfer Monitor window. To monitor a transfer session shown in the Activity window, click the ⊗ icon shown with the session. The Transfer Monitor opens:

The following controls are available in this window:

- ⊘ Open the folder on your computer that contains this content.
- ⊙ Stop the transfer.
- ⊙ Resume a stopped transfer, or retry a failed transfer.

If you have sufficient server privileges and your transfer server is configured to allow it, you can adjust or set your desired transfer rate, minimum transfer rate, and rate policy. However, actual performance is subject to the available bandwidth on your network as well as the transfer settings on your server:

- Target transfer rate – To adjust the transfer rate, locate and select the upper slider ❶ on the left side of the graph and move it up or down to change the desired rate. Note that the actual rate depends on several factors.
- Minimum transfer rate – To set the minimum transfer speed, locate and select the bottom slider ❷ on the left side of the graph and move it up or down to set the desired rate. The actual minimum rate depends on several factors.
- Transfer policy – Select the transfer policy from the drop-down list at the bottom of the window. Note that your specified rate policy may be subject to external limitations:

    Fixed
    The transfer transmits data at a rate equal to the target rate, although this may impact the performance of other traffic present on the network.

    High
    The transfer rate is adjusted to use the available bandwidth up to the maximum rate.

    Fair
    The transfer attempts to transmit data at a rate equal to the target rate. If network conditions do not permit that, it transfers at a rate lower than the target rate, but no less than the minimum rate.

    Low
    The transfer rate is less aggressive than Fair when sharing bandwidth with other network traffic. When congestion occurs, the transfer rate is decreased to the minimum rate, until other traffic retreats.

- Additional options – Right-clicking in the area above the graph opens the same menu as doing so in the Activity window, giving options such as stop or remove transfers, and open the transfer's containing folder.

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 17.

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 13.

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. 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 12.

8. If enabled by an admin, and if you want to obfuscate the file names in your package, select **Use obfuscation on filenames**.

   If enabled, Faspex obfuscates the file names of all uploaded files. In the case of a directory file structure, Faspex also obfuscates the folder name, the names of all files within the folder, and the names and files of any nested directories.

   Faspex does not obfuscate the file extensions of files. For example, after obfuscation, a file with the `.txt` extension may be named `Nqu7ORqTEC2R9GHK8ISFw.txt`.

   Note:

   - File name obfuscation when transferring through Connect requires Connect version 3.9.8 or higher. Faspex does not obfuscate file names if transferring with an older version of Connect.
   - File name obfuscation in Faspex is irreversible.

9. 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.

10. 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.

11. 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.

12. 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]

13. To prevent recipients from downloading this package over HTTP (HTTP Gateway or HTTP fallback), select **Prevent HTTP download for this package**.

14. If transfers through HTTP Gateway is enabled, select (from the **Transfer With** drop-down menu) whether Faspex should use HTTP Gateway or Connect for the transfer.

15. 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.

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[1] The drag-and-drop capability is not supported on some platforms. See the IBM Aspera Faspex Release Notes for the feature support matrix.

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:

Item	Name	Description
A	Download Icon	Click the icon to download the complete package.

Item	Name	Description
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.

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 10.

   Note: If the New Package button does not open a drop-down menu, you do not have permissoin 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**.

Option	Description
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.

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[2] The drag-and-drop capability is not supported on some platforms. See the IBM Aspera Faspex Release Notes for the feature support matrix.

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.

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 10.

   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	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.

Option	Description
	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 (;).

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.

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[3] The drag-and-drop capability is not supported on some platforms. See the IBM Aspera Faspex Release Notes for the feature support matrix.

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.

Received Packages View Full History

Public URL: https://10.0.0.1:443/aspera/faspex/send/to/use
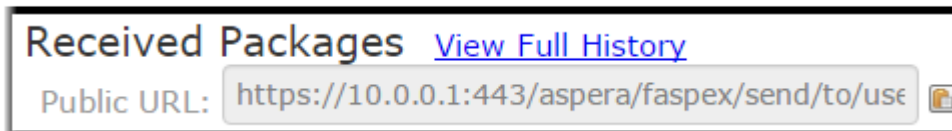
5. Click the ▣ button to copy the public URL to your clipboard.
6. Send the public URL to the external sender.

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

Obfuscating File Names in Packages

For security reasons, you may want to obfuscate the names of files in your packages. The original file names are not visible in Faspex or in logs.

Faspex performs obfuscation when:

- A user initiates a transfer through Connect.
- A user initiates a transfer through the HTTP Gateway.
- A user initiates a transfer from a remote source (file storage on tethered nodes).

If enabled, Faspex obfuscates the file names of all uploaded files. In the case of a directory file structure, Faspex also obfuscates the folder name, the names of all files within the folder, and the names and files of any nested directories.

Faspex does not obfuscate the file extensions of files. For example, after obfuscation, a file with the `.txt` extension may be named Nqu7ORqTEC2R9GHK8ISFw.`txt`.

Note:

- File name obfuscation when transferring through Connect requires Connect version 3.9.8 or higher. Faspex does not obfuscate file names if transferring with an older version of Connect.
- File name obfuscation in Faspex is irreversible.