TIBCO® Vault Server

User Guide

Software Release 2.0.1
August 2015

Two-Second Advantage®

TIBCO™

Important Information

TIBCO® Managed File Transfer Internet Server with RocketStream® Accelerator is entitled TIBCO® Managed File Transfer Internet Server in certain other product documentation and in user interfaces of the product.

Contents

Preface

TIBCO Vault integrates seamlessly with enterprise e-mail systems, as a plug-in to Microsoft Outlook or through a standard Web browser. This means users can easily share and transfer files of any size – internally and externally.

This guide is a quick reference on how to use either the TIBCO Vault Outlook Plug-in or the TIBCO Vault Web Browser Interface. For any additional help needed please see your local TIBCO Vault Administrator for assistance.

Topics

Related Documentation

This section lists documentation you may find useful.

TIBCO Vault Documentation

The following documents form the TIBCO Vault documentation set which can be viewed and downloaded from https://docs.tibco.com/products/tibco-vault-2-0-1:

- *TIBCO Vault Release Notes* Read the release notes for a list of new and changed features. This document also contains lists of known issues and closed issues for this release.
- *TIBCO Vault Installation Guide* Read this manual for instructions on site preparation and installation.
- *TIBCO Vault Administrator Guide* Read this manual for instructions on configuring the Vault Server after the installation.
- *TIBCO Vault User Guide* Read this manual for instructions on using the product to perform file transfer requests and more with Vault browser and Outlook Plug-in interfaces.

How to Contact TIBCO Customer Support

For comments or problems with this manual or the software it addresses, contact TIBCO Support, as follows:

- For an overview of the TIBCO Support and information on getting started with TIBCO Support, visit http://www.tibco.com/services/support
- If you already have a valid maintenance or support contract, visit https://support.tibco.com

  Entry to this site requires a user name and password. If you do not have login credentials, click Register with Support.
- Technical Support email address support@tibco.com
- Technical Support Call Centers:
  - North and South America: +1.650.846.5724 or +1.877.724.8227 (1.877.724.TACS)
  - EMEA (Europe, Middle East, Africa): +44 (0) 870.909.3893
  - Australia: +61.2.4379.9318 or 1.800.184.226
  - Asia: +61 2 4379 9318

TIBCO Vault Browser Interface

TIBCO Vault supports most major web browser applications. Please consult your local Administrator to obtain the URL needed to access TIBCO Vault via a web browser.

Topics

Browser Interface Login

TIBCO Vault provides a Web Browser Interface for end users to send and receive files. If you are already a registered user in the TIBCO Vault Database, use the following URL to connect through the TIBCO Vault Browser Interface:

https://[DNS_HostName]:[httpsPort]/[context]/control?view=am/start.jsp

or

https://[DNS_HostName]:[httpsPort]/

Contact your TIBCO Vault Administrator for the DNS Hostname, HTTPS Port, and context used for your environment.

If you have received an email from another TIBCO Vault user to download files, simply click on the Download Slingshot file(s) link which will take you to the TIBCO Vault Browser Interface to login.

Self Registration

If a TIBCO Vault Administrator has enabled User Self Registration an end user can register an account to begin sending and receiving file attachments using TIBCO Vault. To Self Register accounts do the following:

1) From the TIBCO Vault Browser Login page, click the *First time user? Register Here* link.
2) At the Self Registration page, enter your email address and click Submit
3) An email will be sent to you to validate your account. Continue to the next step by following the instructions in the email.
4) At the Self Registration Confirmation page, provide the necessary information and click I accept. Create my account. after reading the Terms of Service.

5) Use the link on the following page to login to TIBCO Vault. A Welcome to TIBCO Vault email will be sent to the new user if the account was successfully created.

Password Reset

In order to reset your password, access your TIBCO Vault login page and click like *I need help accessing my account*.

You will be taken to a page that provides the option to reset your password.

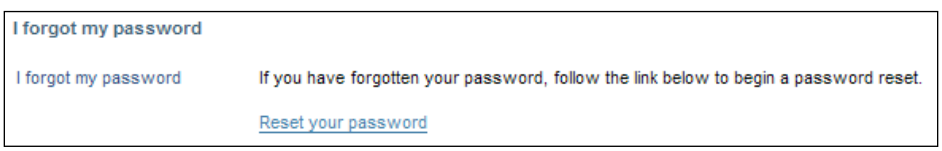


Figure 7

After you click the link, a web browser window will open prompting you to enter your email address.

Once you enter your email address, an email will be sent to you containing instructions on how to set a new password. There will be a link provided in the email. Click the link and you will be directed to the Set Password web page

Once you set a new password, you should be able to log in to TIBCO Vault.

NOTE: In the event that you have more than one user id assigned to the same e-mail address, the password for those users cannot be reset.

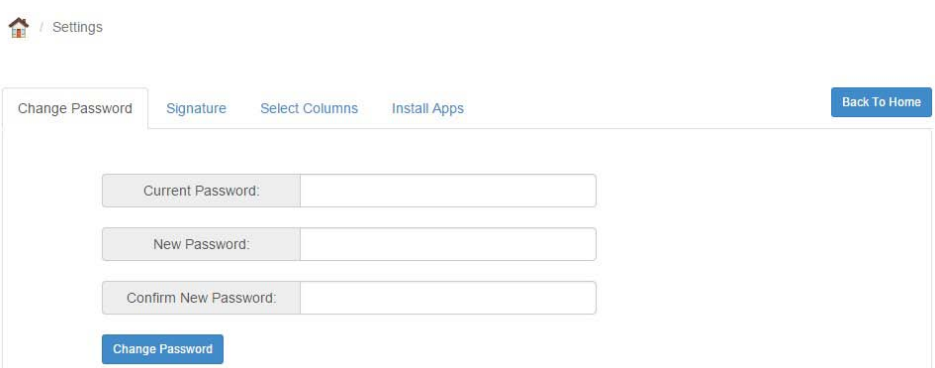
First Time Users

New users can be added to the TIBCO Vault Database when they are sent an email from another TIBCO Vault user containing a link to download a file(s). New users must setup a password for their account before they will be able to download files. To set a password for a new user:

1) Click on the "New User? Click here" link as seen in the TIBCO Vault email that was received.
2) A web browser window will open to verify your email address.
3) Another email will be sent containing a link to set a new password.
4) Follow the link and choose a password and click the "Set Password" button.
5) Now login to TIBCO Vault using your userid and new password. Upon a successful login the Inbox web page will be displayed allowing you to view the available emails with file attachments to download. See the Section Inbox for more detailed information regarding this web page.

Settings

Once you are logged in you can change some of your default settings. Settings include change your password, add a default signature to be used when sending files to other users, select what you would like to see in your Home windows, and download some additional Vault applications.



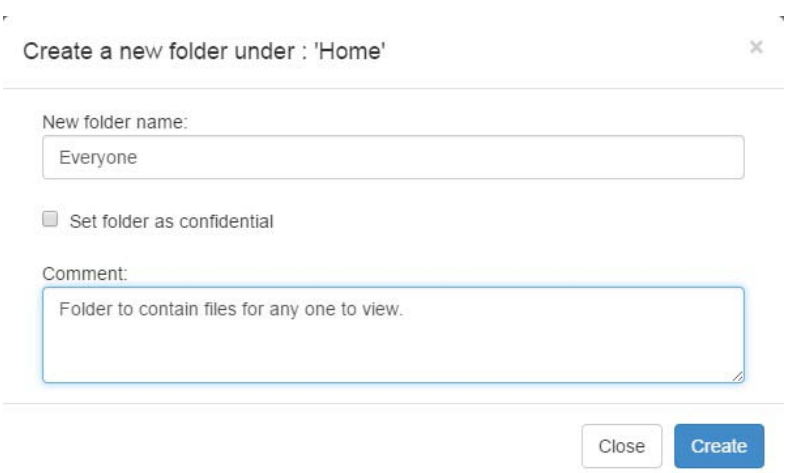
Browser Functionality

A new user logging in to the Vault Browser you will need to setup some basic items before you can send files. In this section we will go over some of the basic functionality to help you get started.

Create a Folder

Upon logging in for the first time to the Vault Browser you will be prompted to create a folder in your Home directory:

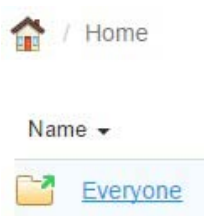
When you click on the link a new window will open for you to create your first folder in the system. In the example below we are creating a general folder to hold files for everyone to see and added a comment (optional).



Once you click on the Create button the folder will be created and then you can add files.

Adding Files to a Folder

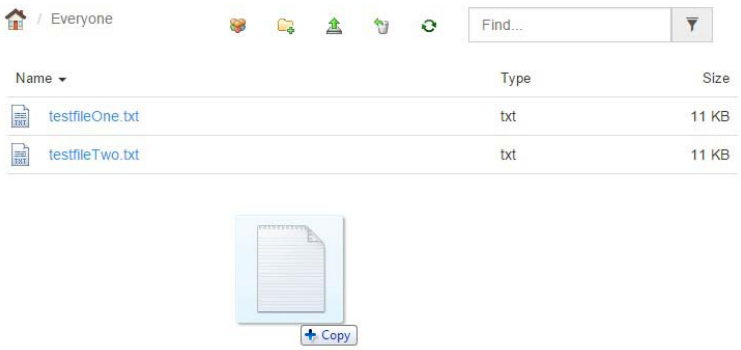
Once the Folder is created, you are ready to add files to the folder. To add files you can use either the ***Drag And Drop*** feature or you can upload a file to the folder. To open a folder, click on the folder name from the Home page. Below is our Everyone folder example continued:



Drag and Drop

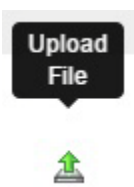
You will be prompted to ***Drag and Drop*** a file into the empty folder.

Below is an example of what will be seen when you drag a file on to the page from a Windows Explorer window (Note – Notice the two other files sitting in the folder that were dragged in prior):

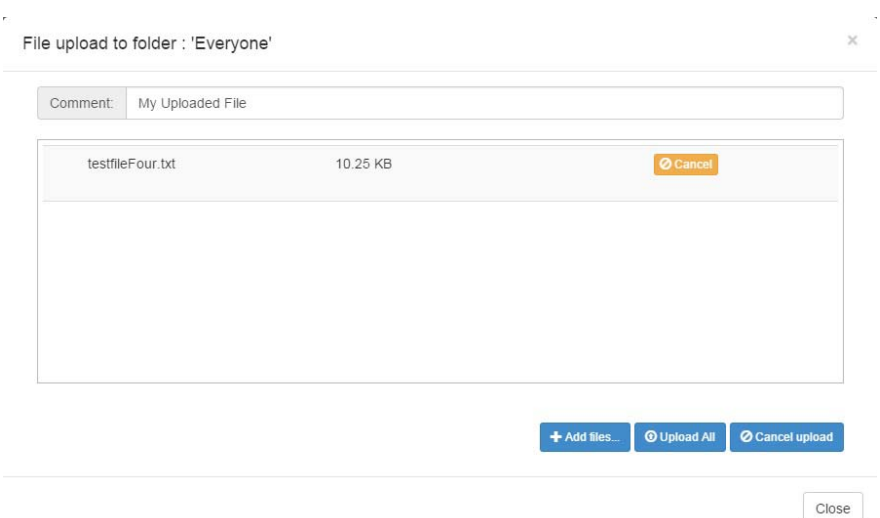


Upload a File

Another option available to save a file in the shared folder is to perform an upload. In the top right corner you will see the upload icon:

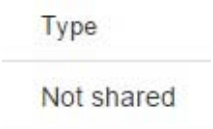


When the upload icon is clicked the File Upload window will open. Enter in a comment in the comment box and then click on the **Add files** button to select the file(s) from your system you want to be uploaded. Once the selection has been made, click on the **Upload All** button.



When files are successfully uploaded you will see a green check mark along with the file size listed. When the files have completed you can click on the **Close** button.

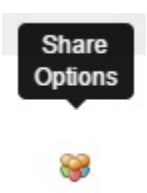
On the Home page you will notice the Type for our Everyone folder reads “Not Shared”:



Until we share our folder no users will have any access to it.

Sharing a Folder

To set the folders Share Options you would click on the area where the “Not Shared” text is located and the Share Options icon will be displayed. You can also right click on a folder and select “Share Folder” to share a folder or view existing shares on a folder.



This icon will open the Share Options settings window. Here is where you will define who will have access to the folder and what type of access they will receive. For our example we continued with creating our folder for “Everyone” and have set one user as an Editor and others as Viewers. The creator is the Owner by default.

Role	Description
Owner	Owners can view and update/create/rename/delete files and folders and invite others to view the folder and its contents.
Editor	Editors can view folders and contents and in addition can update/create/rename/delete files and folders in the share. Editors cannot invite other users to view the folder and its contents.

Viewer	Viewers can view the folder and its contents and can download files. They cannot invite other users to view the folder and its contents.

If the folder should be available for a limited amount of time, an expiration date can be set.

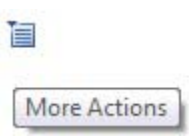
Once the share options are configured and you click the Share button, an email will be sent out to the Collaborators informing them a folder has been shared by you for them.

In addition to the user being informed of the folder being available to them you can also send an email informing them about the file availability or to a user that is not in the collaborator list:

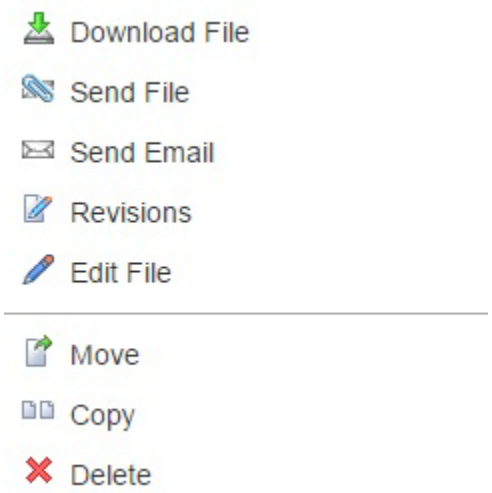
Sending an Email

When you are in the shared folder viewing all the files and folders available for your collaborators you may find you need to send them an email to for instance, let them know a new file was uploaded to the shared folder for them to review. (Collaborators are sent an automatic email when a folder has been shared but not when a file has been added to a shared folder.)

To send an email click to highlight the row for the file that you would like to send an email to the collaborators about. You can right click on the shared file or folder and select “Send Email” or you can click on the “More Actions icon The **More Actions** icon will be displayed in the top ight corner of the page:



When you click on the **More Actions** icon the following menu is displayed:



Click on Send Email to be able to send out an email to all the collaborators for this shared folder. Click on the **Send** button when you are done.

Sending a File

In addition to being able to send an email to your collaborators you can also send a file from a shared folder to a user that is not part of your collaborators list. This can be done two ways. The first is by right clicking on a file and selecting “Send File” or clicking on the **More Actions** icon as we demonstrated in the Sending an Email section above. Click on Send File option. From here you can select a user(s) and include a message (Note – by default the file will have an expiration date 30 days from the date being send to be downloaded). Click the **Send** button to send the file. The other option to send a file is by using the Mailbox Send File. To find out more regarding Mailbox functionality please see the Mailbox section of this manual.

Mailbox

The Mailbox allows a user to Send files, download files sent to them from their Inbox, and check the details of files they have sent to other from the Sent Items tab.

Send Files Tab

When you enter the Maibox you will be in the Send File tab. From here you can send a file from your system to a user(s) outside of the Shared folders you may have configured.

Inbox Tab

The Inbox will contain file downloads available to you that have been sent by other Vault users.

Sent Items Tab

The Sent Items tab will give you a quick status for the files that you have sent out to people.

TIBCO Vault Client for Windows and Mac

Topics

Vault Client for Windows and Mac Download

TIBCO Vault provides a Web Browser Interface for end users to send and receive files. In addition to the Browser interface TIBCO Vault Server comes with a Desktop Client for Windows and a Desktop Client for Mac to be downloaded and installed on your local Windows or Mac servers. Use the following URL to access the TIBCO Vault Browser login page:

https://[DNS_HostName]:[httpsPort]/[context]/control?view=am/start.jsp

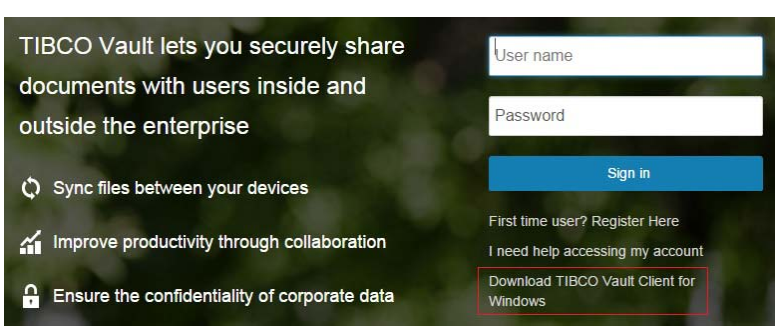
or

https://[DNS_HostName]:[httpsPort]/

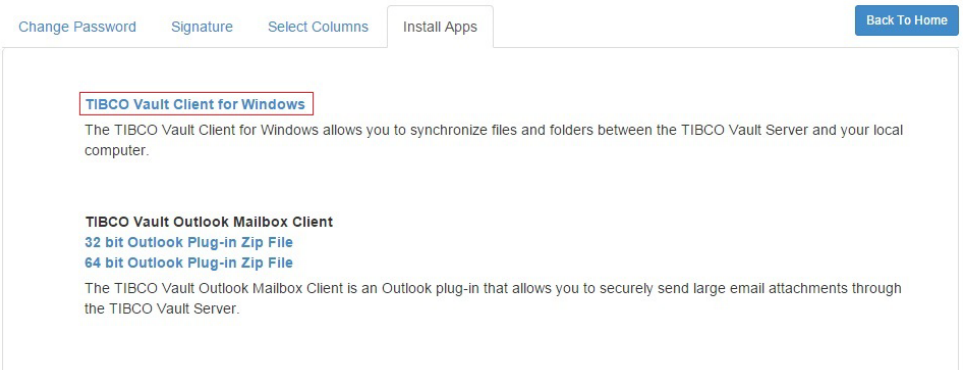
Note: Contact your TIBCO Vault Administrator for the DNS Hostname, HTTPS Port, and context used for your environment.

. On the login page there will be a link to download the Desktop Client for Windows or Mac installation packages:

Based on your operating system the login page from will determine which client you can download from the web page. Below is an example of what you would see if you were accessing the login page from a Windows server:

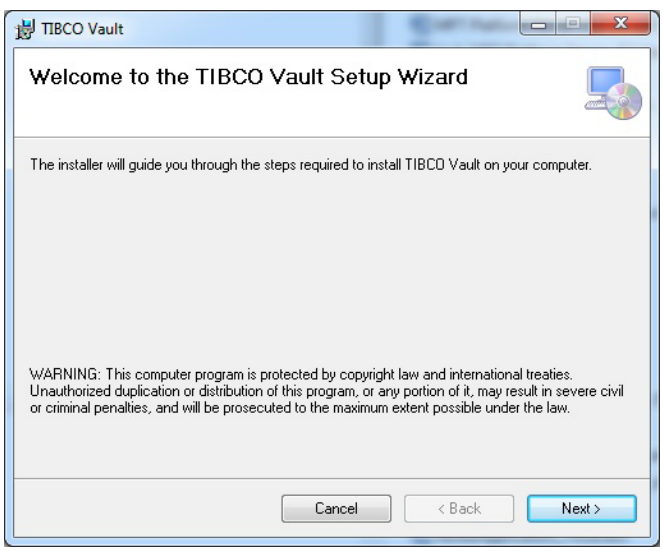


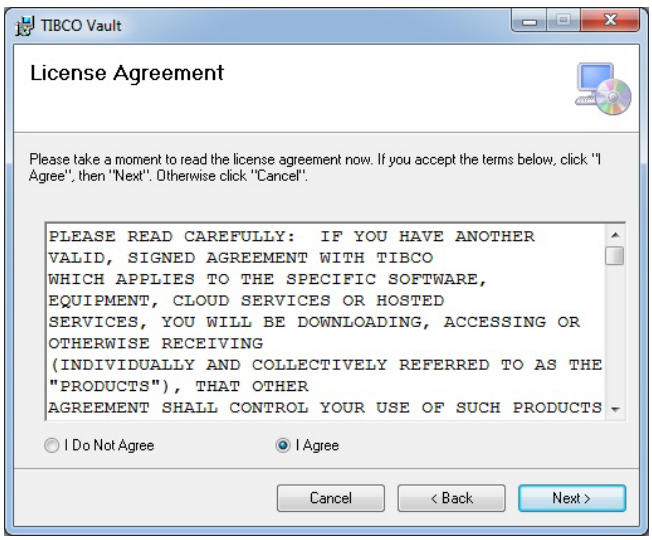
If you are already logged in to the Vault Browser interface you can download the Desktop Clients from the Install Apps tab from the Settings window (Note – based on the operating system you are using will determine which Desktop client you will be able to download.):

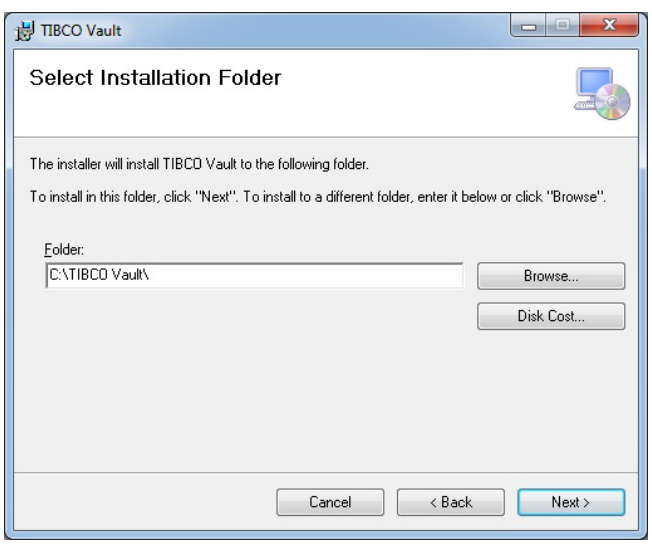

Change Password
Signature
Select Columns
Install Apps
Back To Home
TIBCO Vault Client for Windows
The TIBCO Vault Client for Windows allows you to synchronize files and folders between the TIBCO Vault Server and your local computer.
TIBCO Vault Outlook Mailbox Client
32 bit Outlook Plug-in Zip File
64 bit Outlook Plug-in Zip File
The TIBCO Vault Outlook Mailbox Client is an Outlook plug-in that allows you to securely send large email attachments through the TIBCO Vault Server.

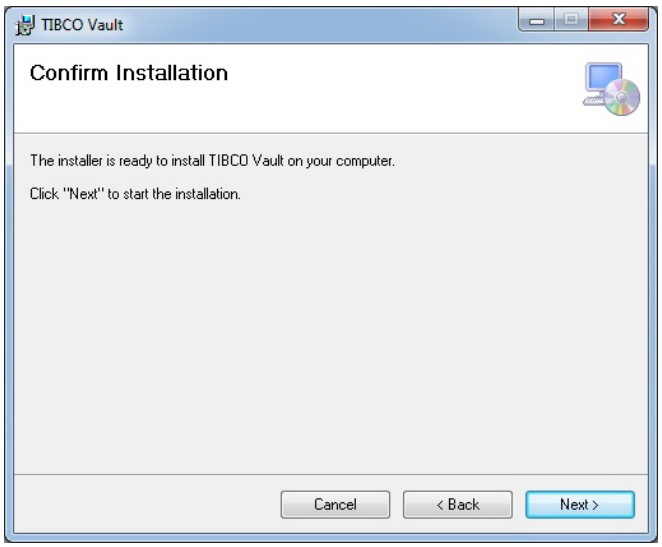
Configuring Vault Desktop Client

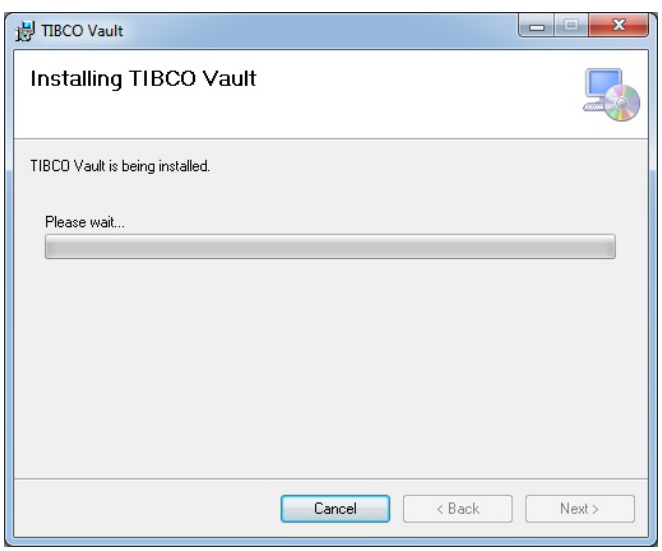
After downloading your Vault Desktop Client software you will want to install and configure it. For this example we will use the Desktop Client for Windows. Double click on the TIBCOVault.msi file. You will need to Accept the End User License Agreement and then set where you would like the software installed if you do not want to accept the default directory:

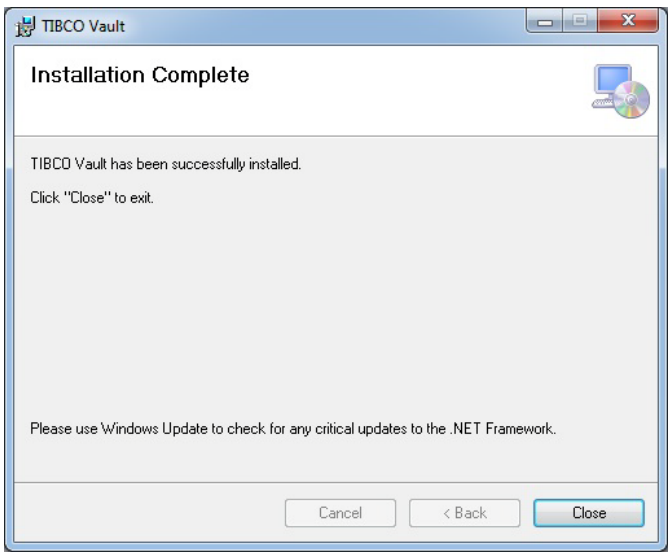



TIBCO Vault
License Agreement
Please take a moment to read the license agreement now. If you accept the terms below, click "I Agree", then "Next". Otherwise click "Cancel".
PLEASE READ CAREFULLY: IF YOU HAVE ANOTHER
VALID, SIGNED AGREEMENT WITH TIBCO
WHICH APPLIES TO THE SPECIFIC SOFTWARE,
EQUIPMENT, CLOUD SERVICES OR HOSTED
SERVICES, YOU WILL BE DOWNLOADING, ACCESSING OR
OTHERWISE RECEIVING
(INDIVIDUALLY AND COLLECTIVELY REFERRED TO AS THE
"PRODUCTS"), THAT OTHER
AGREEMENT SHALL CONTROL YOUR USE OF SUCH PRODUCTS
I Do Not Agree
I Agree
Cancel
< Back
Next >

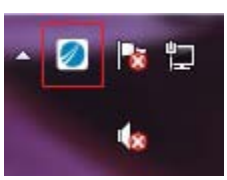

TIBCO Vault
Select Installation Folder
The installer will install TIBCO Vault to the following folder.
To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".
Folder:
C:\TIBCO Vault\
Browse...
Disk Cost...
Cancel
< Back
Next >


TIBCO Vault
Confirm Installation
The installer is ready to install TIBCO Vault on your computer.
Click "Next" to start the installation.
Cancel
< Back
Next >

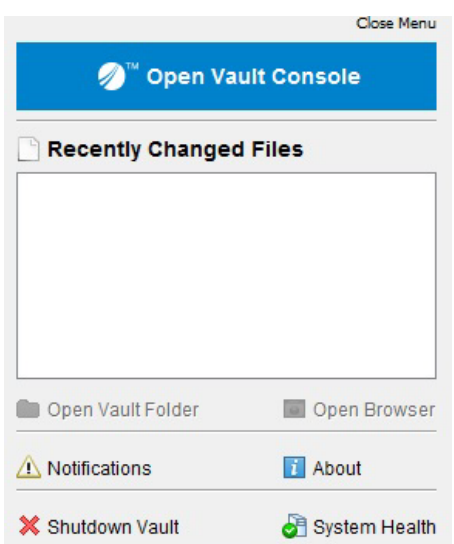

TIBCO Vault
Installing TIBCO Vault
TIBCO Vault is being installed.
Please wait...
Cancel
< Back
Next >



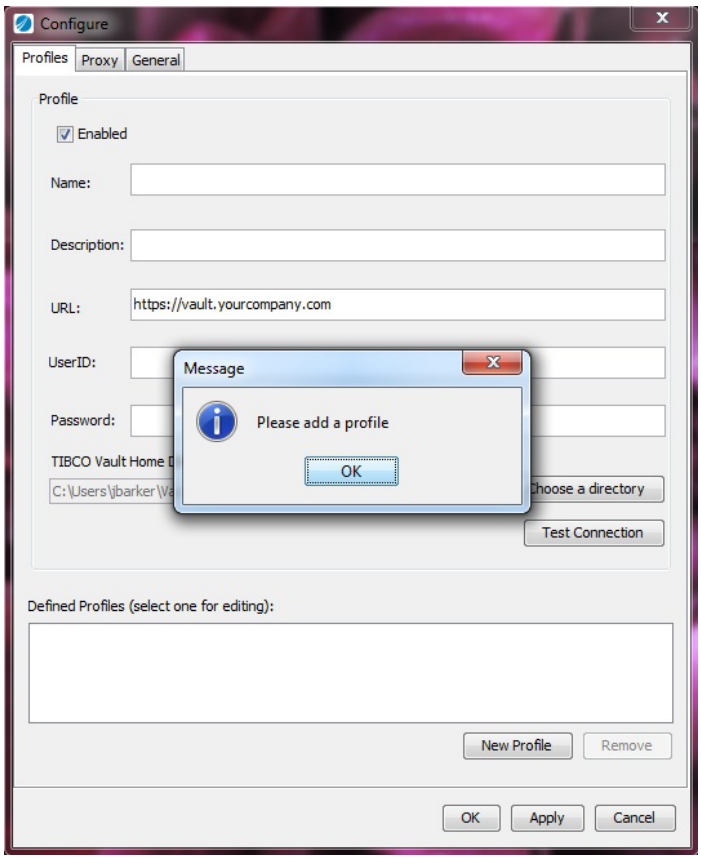
After the installation completes you will see the TIBCO Vault Desktop Client icon in your System Tray:



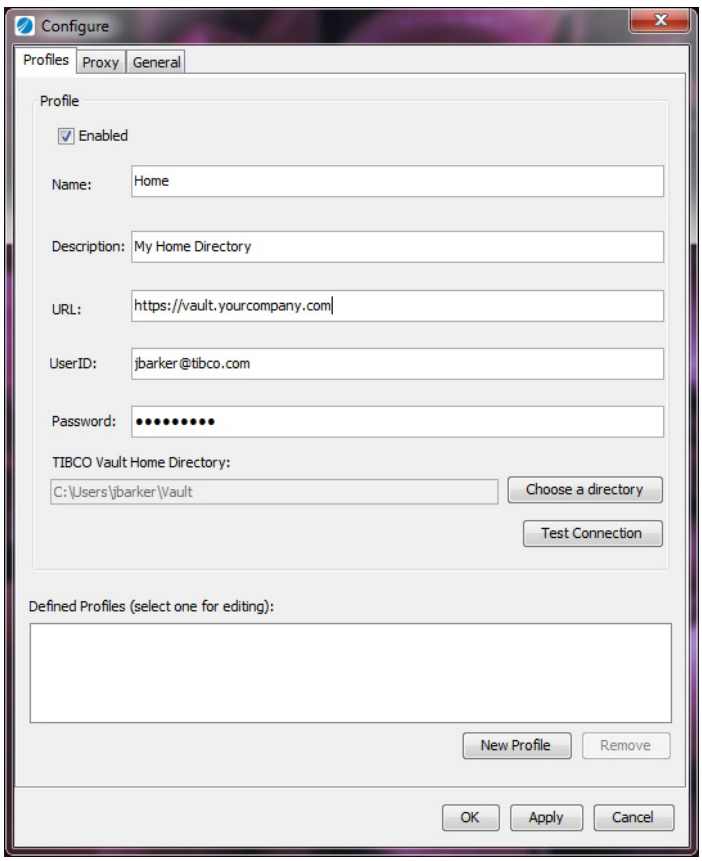
Click on the icon to open the TIBCO Desktop Client System Tray Pop-up



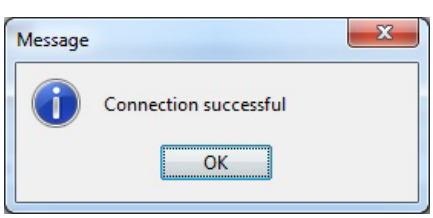
Click on the “Open Vault Console” to configure your Desktop Client. You will be prompted to add a profile. Click on the **OK** button:



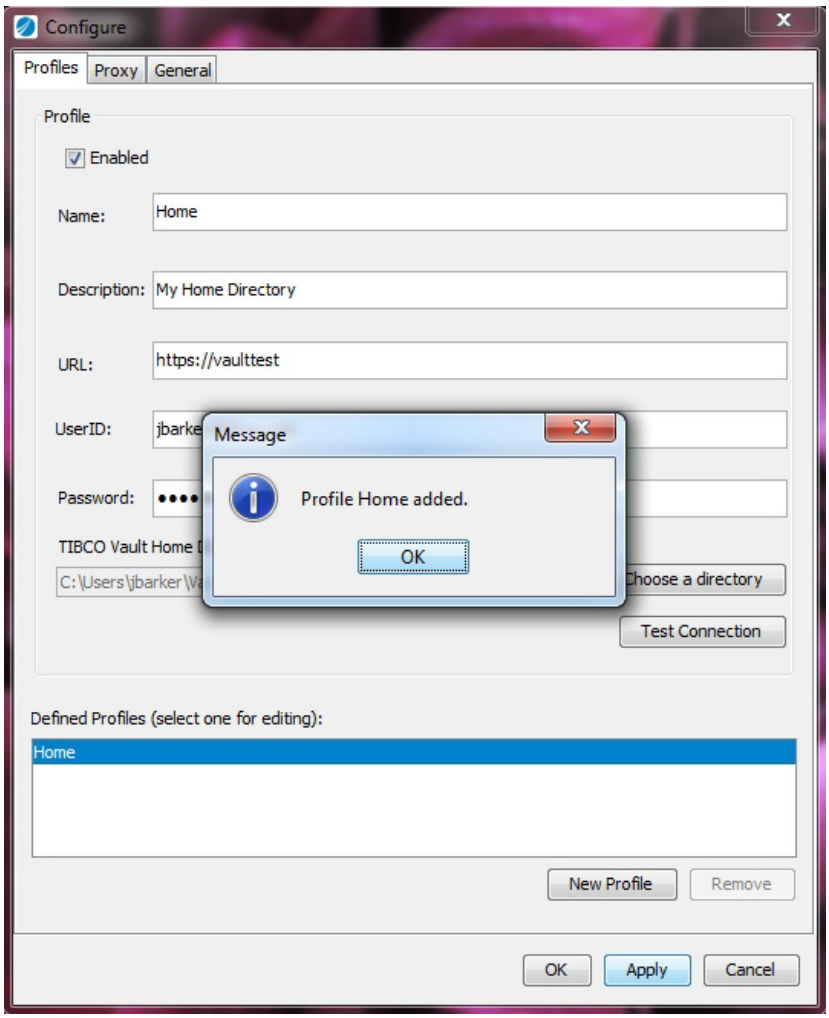
For our example we will make it look similar to the Browser interface and call the profile Home (set the URL to your companies URL. This should be the same URL as you used to access the Browser login web page):



Before clicking the **Apply** or **OK** buttons you should test the URL string is valid by clicking on the **Test Connection** button. When the connection is good you will see the following:

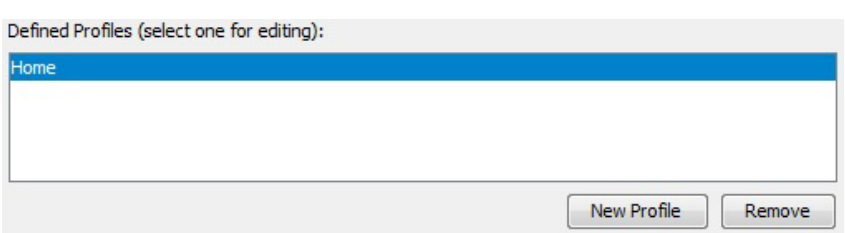


Click the **OK** button. Now click on the **Apply** button. When the configuration finishes you will see your Profile is added message:

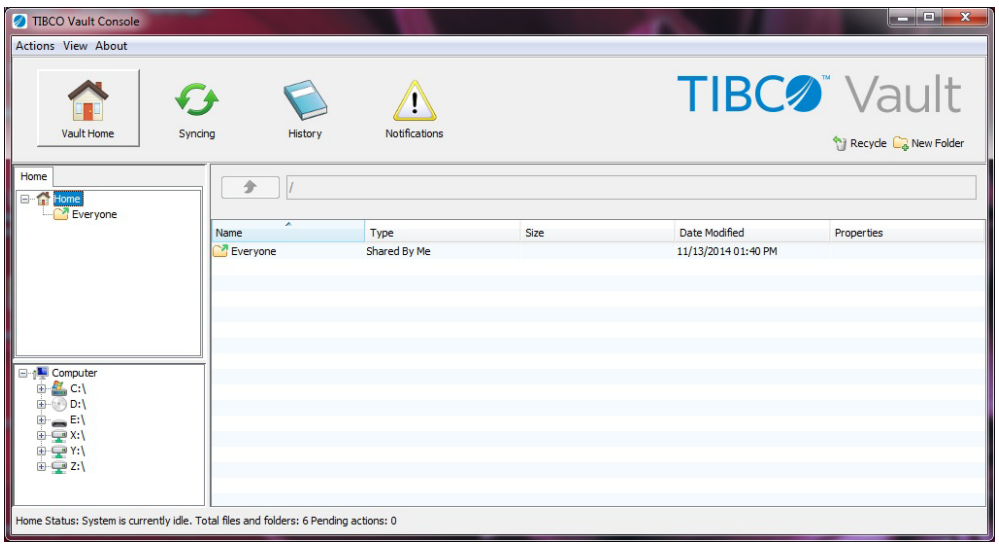


And you will see the new profile listed in the Defined Profiles box

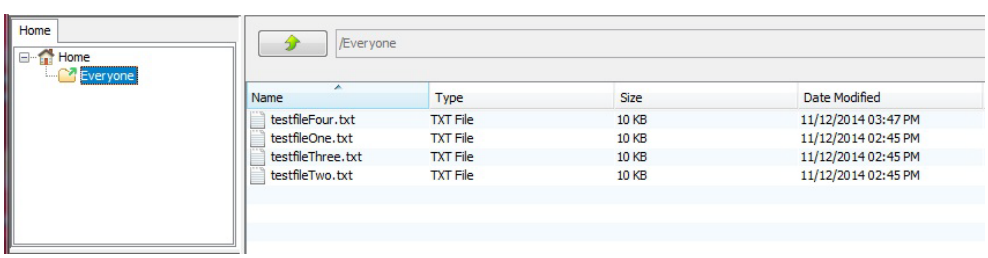
(Note – You can have more than one profile if needed):



Now click the **OK** button to open the Vault Console (Notice our "Everyone" folder that we created in our Browser Interface example has Synched with our Desktop Client):



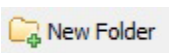
If you click on the Everyone Folder under Home you will see all the files we uploaded:



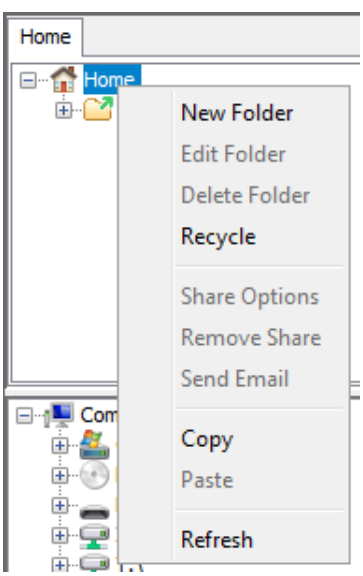
Vault Desktop Client Functionality

Creating Folders

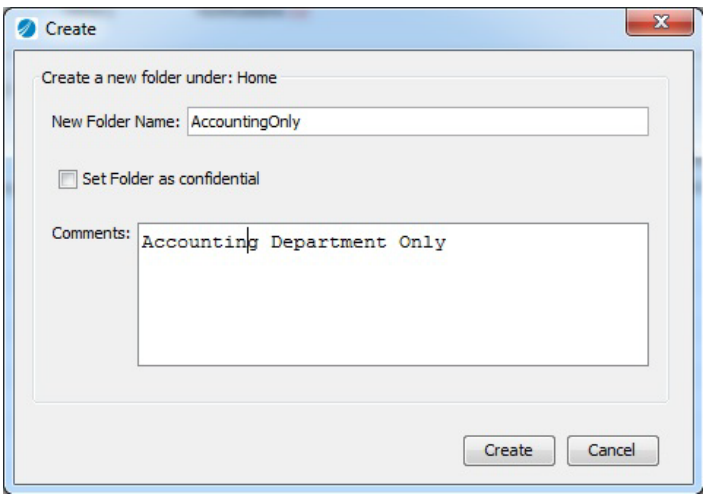
To create new folders to share you can either click on the New Folder icon:



Or right click on the top level directory (Profile) to display a menu of options:



When you click on the New Folder icon or Menu item you will be presented with the following screen to create a folder to be added to the system:

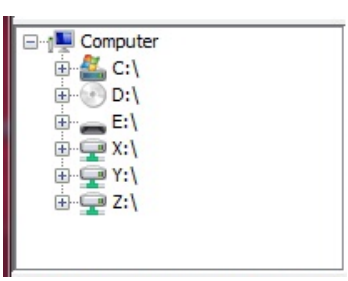


Once you are done you would click the **Create** button and you will see the new folder was added to the screen.

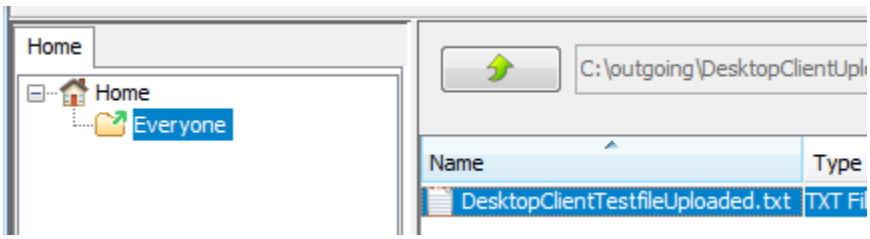
Name	Type	Size	Date Modified
AccountingOnly	Not Shared		11/14/2014 08:59 AM
Everyone	Shared By Me		11/14/2014 08:59 AM

Upload a File

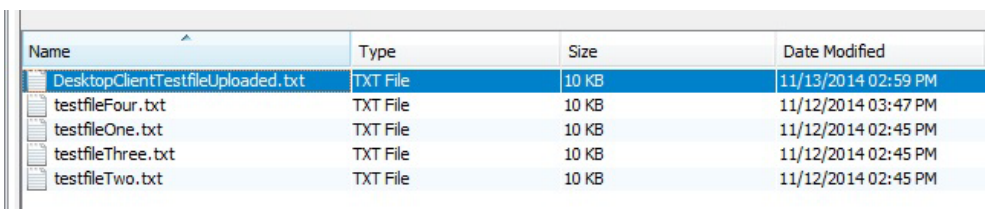
To Upload a file(s) using the Desktop Client you would search for a file through the bottom left corner Window. This Window allows you to nav\igate through the local file system. Ours looked like this:



Navigate to the folder that contains the file(s) that you want to add to the shared folder. Click on the file and then drag it to the Shared folder in the top left box (Ours is called Everyone):



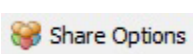
Now double click to get into the Shared folder and you will see the file has been added:



Name	Type	Size	Date Modified
DesktopClientTestfileUploaded.txt	TXT File	10 KB	11/13/2014 02:59 PM
testfileFour.txt	TXT File	10 KB	11/12/2014 03:47 PM
testfileOne.txt	TXT File	10 KB	11/12/2014 02:45 PM
testfileThree.txt	TXT File	10 KB	11/12/2014 02:45 PM
testfileTwo.txt	TXT File	10 KB	11/12/2014 02:45 PM

Share a Folder

When a new folder is created by default it is not shared. To share the folder and its files with other users you would click on the new folder to highlight it and the Share Options icon will be displayed:



You will be presented with the Share Options window where you can choose users and their roles that should have access to the folder. Click on the **Share** button when you are done. The users will receive a notification of the new share.

Sending a File

To send a file to users outside of the collaborators you can right click on a file and select Send File from the menu. Select the user(s) you would like to send the file to and set any other options available on the screen and click the **Send** button when you are done.

Send an Email

To send an email, right click on either a folder or a file and click on Send Email from the menu. Choose to send the email to all or some of the collaborators for the share and then click the **Send** button.

Download Files/Folders

To copy files/folders from the Vault Client you would right click on the file/folder and click on **Copy** from the menu. Then navigate to the system directory through the left bottom windows that you want to paste the files in. In the right hand panel right click anywhere in the panel and click Paste from the menu. The file/folder will be copied to that location.

Synching Files

The Desktop Clients will synch all the folders and files by default with the Vault Server. If you want to pause the Synching action for any reason click on the Synch icon and you will see the **Pause Syncing** button. You can select the individual folders you would like to pause the synching for or you can select all the folders. Click the **Apply** button when you are done to apply the changes.

History

To view the history of the actions that have taken place on the desktop client click on the **History** button.

Notifications

When a user shares a folder with you a notification is sent out:

When you click on the **Notifications** icon you will have the opportunity to Accept or Decline the share offer.

TIBCO Vault Outlook Plug-in

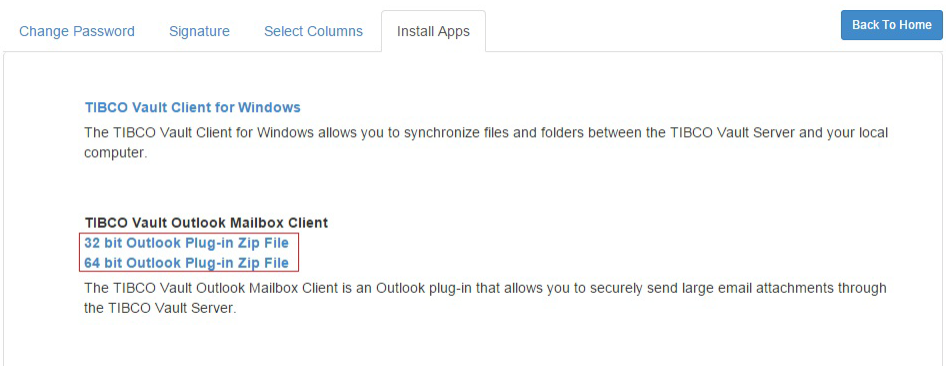
TIBCO Vault will integrate seamlessly with MS Outlook. The plug-in provides you with a familiar way to view your TIBCO Vault emails. This section explains how to use the TIBCO Vault Outlook Plug-in after is has been installed on an end user's desktop.

Topics

Outlook Plug-in Download

Some Vault environments may be configured to use the Vault Outlook Plug-in that allows you to securely send files as email attachments through the TIBCO Vault Server. This is used typically when larger files are sent through email.

As a Vault Browser user you have access to the Outlook Plugin software to download for installation from your Settings menu. (See the Settings section of this manual for more information.)



Click on the link to download the right version for your machines architecture.

Contact your Vault Server Administrator for more information on the Plug-in.

Outlook Plug-in Login

When your Outlook has been configured to work with the TIBCO Vault plug-on you will be prompted with a Welcome window to configure the TIBCO Vault server connection information the first time you login in to Outlook.

Note: You may not see the Welcome window if the TIBCO Vault plug-in has already been configured for you.

Go to your Tools menu as instructed and click on TIBCO Vault Options from the menu. On the Server tab you will find the server connection fields that need to be configured (See Figure 2 below). The connection information needed to be setup at this time consists of just the Server Address (Host URL which is the IP, Port, and context) of the TIBCO Vault server and your user name and password. Please consult your local Administrator to obtain this information if you do not have it already.

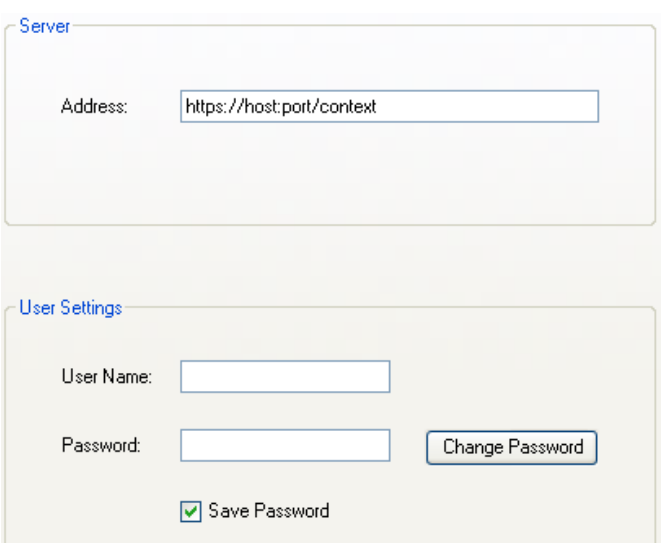


Figure 1

Once you have configured the TIBCO Vault server information and click the Ok button you will be prompted to restart Outlook.

Note: The restart is necessary for the Plug-in to have new information to be distributed through the program, if this is not done some of the programs functions will not perform correctly.

When you restart Outlook you will now be prompted to login to the TIBCO Vault Server. You may receive a Security Alert after logging in similar to the one below:

Figure 2

This window is informing you the certificate being used to connect to the TIBCO Vault server is not in your predefined list of trusted authorities or there is a difference in the connection information you have in your URL from the TIBCO Vault server's certificate. Contact your local Administrator if you have questions about this process.

Click the Yes button if you want to accept the certificate and then you will be able to send secure file transfers using TIBCO Vault.

Sending Files Using Outlook Plug-in

To send an email file attachment securely using TIBCO Vault, open a new email window in Outlook as you normally would

In Outlook 2007 and 2010, you have to navigate to the 'Add-Ins' tab on a new email. You will see the same TIBCO Vault buttons.

Click on the Address Book icon, , to select one or more email recipients you would like to send to. If you do not see the user you would like to send an email to and you are defined as a Full or Power user, then click the Cancel button and manually type the new users email address in the To: field.

Attach one or more files by clicking the attachment icon, .

NOTE: When attaching a large file in Outlook (over 2gb), the file size may be displayed incorrectly on the compose email page.

When your email is complete, click the TIBCO Vault button to send it through TIBCO Vault, depending on how the TIBCO Vault server is configured you can also use the Outlook **Send** button *(The plug-in will decide if the message gets automatically sent through TIBCO Vault, consult your administrator for more details)*. If you had defined a new recipient in the To, CC, or BCC fields to be added to the address book you will be prompted to fill in the new recipients Full Name (required), Company (optional) and Telephone number (optional).

NOTE: Embedded images will not be displayed in a TIBCO Vault email, or attached as an attachment.

Menu Bar Icon	Definition
Address Book	When you want to send an email click on the address book to reveal a pre-defined contacts list of authorized TIBCO Vault users. Insert one or more recipients in the To, CC, and BCC fields.

Menu Bar Icon	Definition
Check Names	When you type in a recipient name in the To, CC or BCC fields and you want to make sure they exist in the TIBCO Vault contacts you can click this icon. If the user is found you will receive Check Names successful message. If it does not find a match you will receive a message it was not found.
Attach File	Use this button to attach a file to your email.
Slingshot Send	Click this button to send the email with the file attachment via TIBCO Vault.

Direct Email Link

TIBCO Vault provides the ability to create a customized URL that is a direct email link to insert into an email or signature. The URL gives the ability for other users to automatically compose an email message to you after clicking on the link. A user must first have an account with TIBCO Vault before trying to send an email using a URL for the direct email link.

The format for creating an email link URL is as follows:

https://[DNS_HostName]:[httpsPort]/[context]/db/[EMailAddress]

For Example, to create an email link for email address "JohnSmith@tibco.com", use the following URL format:

https://yourcompany.com:8443/cfcc/db/JohnSmith@tibco.com

Receiving Files Using Outlook Plug-in

When a TIBCO Vault email with a file attachment is sent to you an email will be sent to your Outlook Inbox as with any other email you receive. The email will tell you who sent it and will contain a list of the file(s) available for you to download.

First time users must click on the 'New User' link in the email to configure their account. A password MUST be configured before you will be able to download files. The only time this rule does not apply is if a password has been pre-defined for you by your Administrator.

TIBCO Vault emails will not automatically store embedded images as attachments. If you click the 'Outlook View' you will be able to see the embedded image in the signature as you normally would. These images will not be visible from the TIBCO Vault view.

NOTE: Make sure to check your junk email in Outlook if you are not receiving TIBCO Vault emails.

Four Ways to Download a file

1) Double click on the email and then double click the attachment in the email header, the same as you would in Outlook.
2) Double click on the email and then right click the attachment in the email header. A drop down menu will appear with options to download your attachment.
3) Click on the Download TIBCO Vault file(s) link to open your browser to log into TIBCO Vault's Web Browser Application (For more information see the Web Browser Quick Start Guide) in order to download the file(s).
4) Double click on the email and the window will open with a menu which will allow you to download the file(s).

Junk Folder

Should any TIBCO Vault emails get placed in the Outlook Junk folder right click on the email and select: Junk E-Mail > Never Block Sender

Advanced Find

If you have many emails you can click on the Advanced Find icon to search through your emails and attachments.

The Advanced Search in TIBCO Vault is very powerful and provides several different search criteria to choose from. The default search will search only for e-mails sent on the current day. You can further refine your search by filling in data in any of the available fields on the page. When you enter search criteria, you can enter all or partial *(use * for wildcard)* data to conduct your search with. Click the Search Now button to begin your search.

The matches will display in the section below the search criteria.

TIBCO Vault Outlook Plug-in Options

This section describes the configurable options available with the TIBCO Vault Outlook plug-in. If you dropdown your Tools Menu in Outlook and click TIBCO Vault Options. The following window will open:

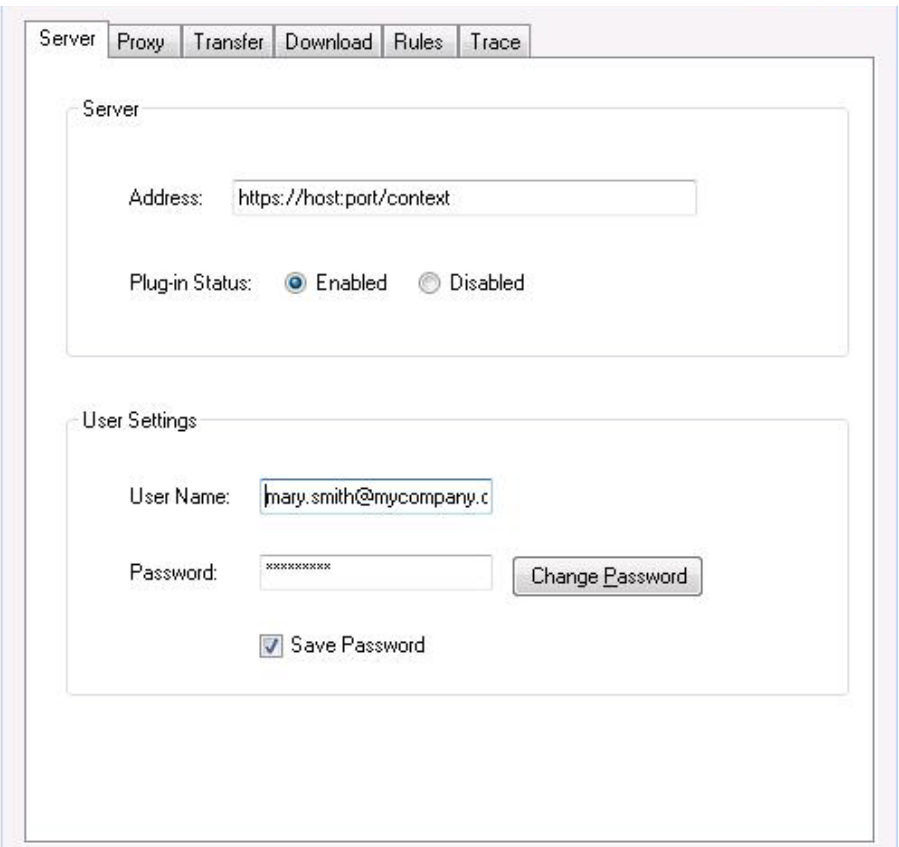


Figure 3

The Server tab allows you to can change your TIBCO Vault server host URL and your login user id and password. *Consult your local administrator before changing the Server information fields.*

On the Proxy tab you would configure the proxy information for your environment. *Consult with your local administrator to set your Proxy information if needed.*

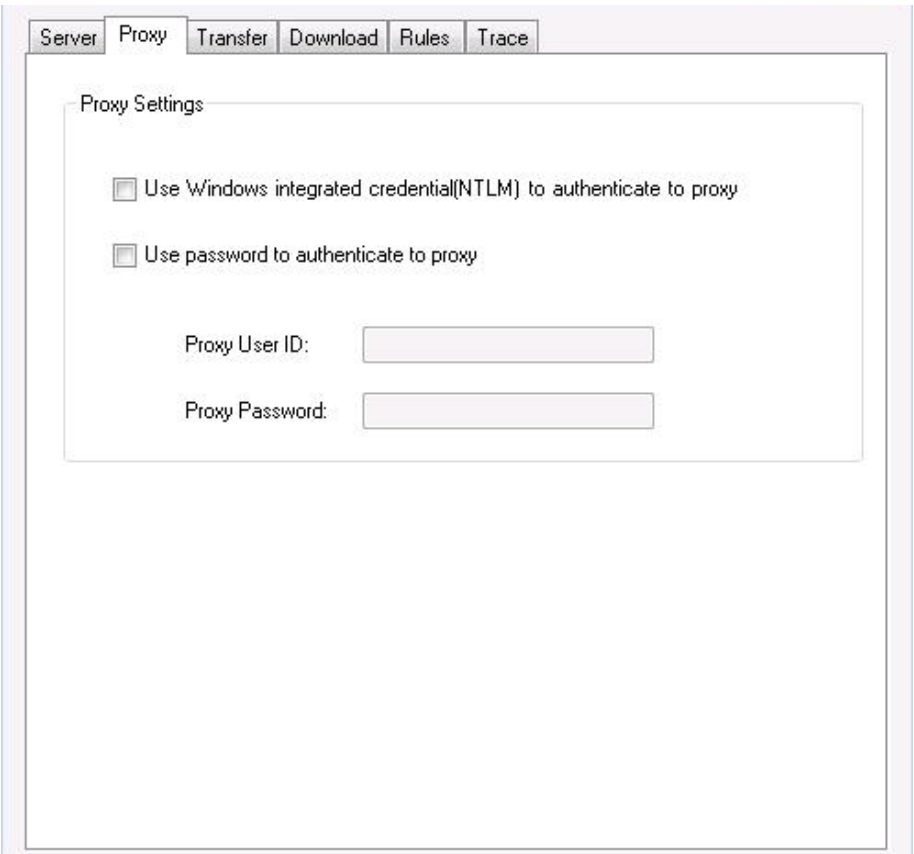


Figure 4

On the Transfer tab you would set specific requirements for each TIBCO Vault email that is sent out to recipients by you as seen below:

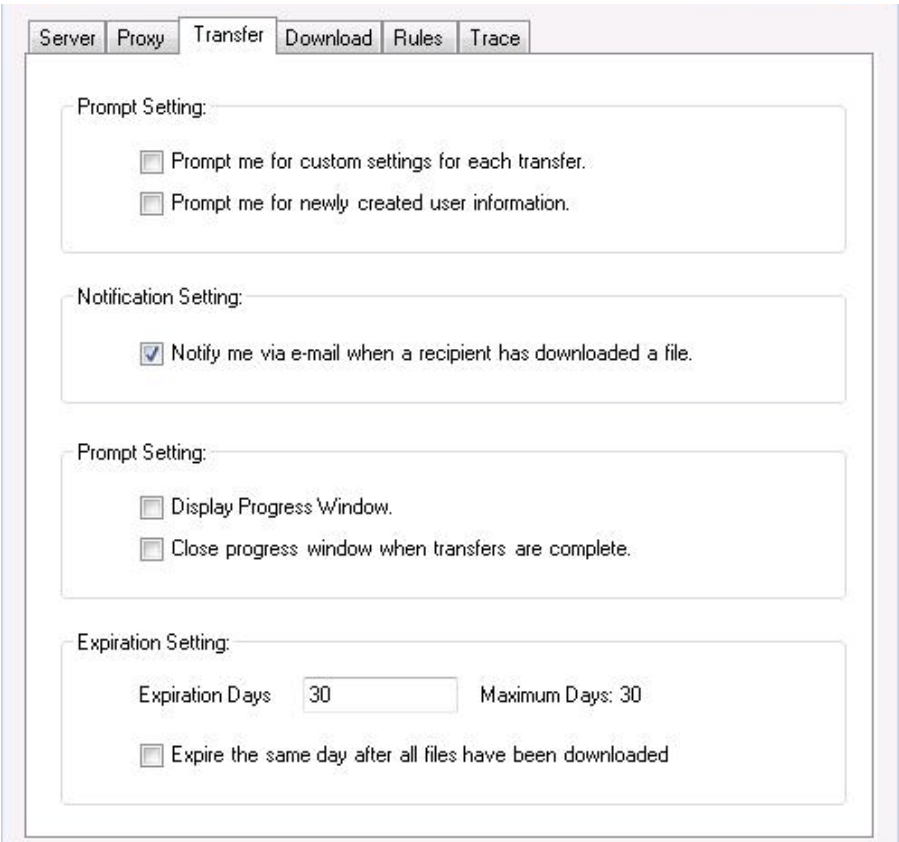


Figure 5

Note: If large files or multiple files are sent per email we recommend using the create zip file functionality that is available when the **Prompt me for custom settings for each transfer** is enabled. Below is the window you will receive when sending a file with this prompt enabled:

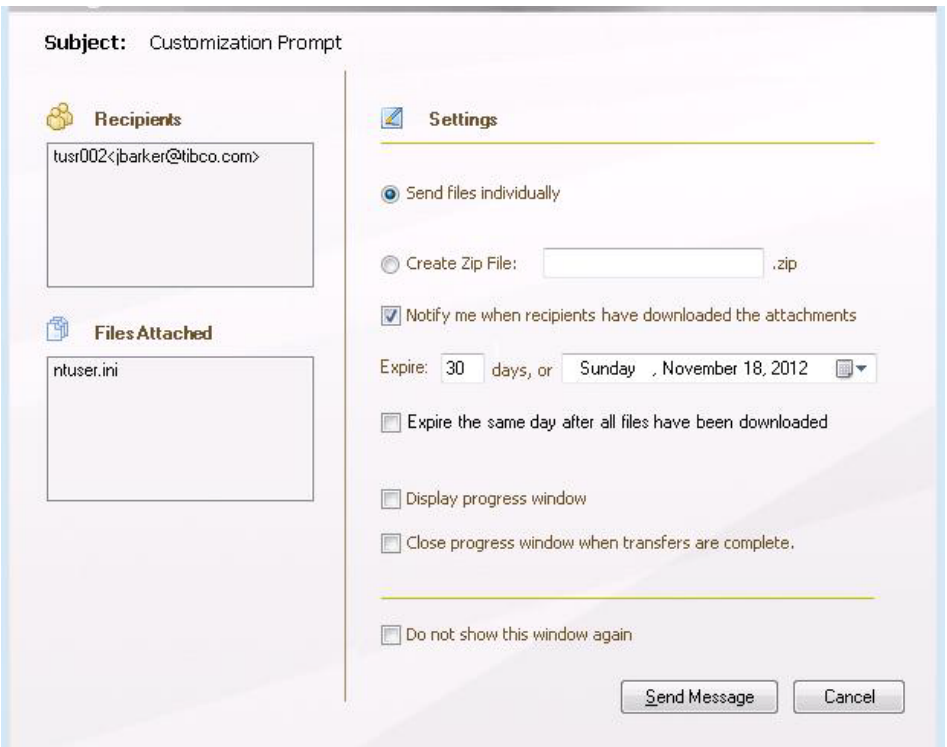


Figure 6

The Downloads tab contains the path for your downloaded files to be placed.

The Rules tab contains settings for warning messages you want to receive when certain actions take place. By default all the messages are not enabled.

Consult your local Administrator about changing your Trace File and Level Settings under the Trace tab.