



e-Safe Deposit Box – User Guide

Add File - File Location

This box allows you to browse your local computer to find a file. Click the "Browse..." button to bring up a pop-up prompt. Navigate to your file, then click "Open". Once you have done this, the location of your file should show up in the text box, and you can continue to fill out the rest of the form.

Add File - Category

This box allows you to define which category your document corresponds to. Make sure this fits, because many people will search for documents based on this field.

Add File - Department

This box allows you to define, for each department, the corresponding access rights you want users to have.

Add File - Authority

This box allows you to define a specific type of access for departments, including forbidden, view, read, modify, and admin

Add File - Description

This box allows you to attach a short description to the file, which will be used in the file listings and during searches. Try to be as precise as possible. Use the Comment section if you need more space

Add File - Comment

This box allows you to attach a longer message about the file, maybe explaining instructions on opening or viewing the file, etc.

Add File - Example

Let's assume you want to set up the following access rights on a file:

- Only you can administer the file
- Only your department can modify the file
- Only the IS department can read the file
- Only the Financial department has View rights
- Anyone else is Forbidden

After you select the file location and category, do the following to set the file permissions to match the above example:

1. By default, you are set with admin permissions on your new file. See the "Specific Permissions Settings" section. You should see only your username selected under all but the forbidden column.
2. In the Department drop-down box, select your department from the dropdown.
3. Notice the radio toggle buttons below the Department box. These are used to set up each department with specific "department-wide" permissions.
4. In the Authority section, click on the Modify button. Your entire department is now set to be able to modify the file
5. In the department drop-down box, select the IS department
6. In the Authority section, click on Read. The entire IS department is now set to be able to read the file
7. In the department drop-down box, select the Financial department
8. In the Authority section, click on the View button. The entire Financial department is now set to be able to view the file
9. In the department drop-down box, select "Default Setting for the unset department."
10. In the Authority section, click on the Forbidden. Any department not specifically set is now set to forbidden
11. Now, click on the "Add document" button to submit your file

Note: There is also an "All departments" field, which you can use to set all the departments to the same, whether it be admin, read, view, etc.

You may also notice, as you are setting permissions, that you can go "back" to another department, and the settings are retained.

Rights - Admin

This level of access means you can do anything to the file including downloading, updating, deleting, etc..

Rights - Modify

This level of access means you can update the file, but not remove it

Rights - Read

This level of access means you can

Rights - View**Rights - Forbidden**

This level of access means you may not have any access to the file whatsoever and will not see it in any lists or searches.