

# RMFT Desktop Client User Guide

Software Version 2.5

November 24, 2011

November 24, 2011  
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# Table of Contents

<b>Introduction.....</b>	<b>4</b>
<b>1. Creating Profiles .....</b>	<b>5</b>
Editing and Removing Profiles .....	10
<b>2. Sending Files.....</b>	<b>11</b>
Sending Files from Windows Explorer .....	11
Sending Files from a Microsoft Application .....	16
Sending Files from Microsoft Word, Excel or PowerPoint .....	16
Choosing Recipients from the Address Book .....	18
Searching for Recipients .....	20

# Introduction

RMFT is a managed file transfer platform that facilitates secure file exchange between an organization's internal users, external users, and business partners.

RMFT Desktop Client enables you to easily send any number of files to other RMFT users, by simply selecting the files or folders and clicking **Send to Recipients** in the Windows Explorer right-click menu. You can also send documents directly from supported Microsoft applications (Word, Excel and PowerPoint) using the **RMFT Desktop Client Send Menu Add-In**.

Files are sent as a *package*, which greatly reduces the possibility of files getting lost in transit while enabling end-to-end auditing of the transfer.

After sending files you can log in to RMFT Web Client to verify that the files you sent have reached their intended recipients (by locating the package in your **Sent** folder). For more information on RMFT Web Client, please refer to the *RMFT Web Client User Guide*.

This document provides step-by-step instructions for sending files using RMFT Desktop Client. There are two chapters in the document:

- Chapter [1. Creating Profiles](#) explains how to create RMFT Desktop Client Profiles. You need at least one Profile to be able to send files. A default Profile may have already been included in your RMFT Desktop Client installation. In this case, you do not need to create any additional Profiles unless specifically instructed to by your RMFT administrator.
- Chapter [2. Sending Files](#) explains how to send files using RMFT Desktop Client.

# 1. Creating Profiles

A Profile contains RMFT Server connectivity information such as:

- The IP address, hostname or URL of the RMFT Server machine
- Your credentials for accessing the RMFT Server machine (if required)

**IMPORTANT:** The information that you are required to enter in your Profile should be provided by your RMFT administrator.

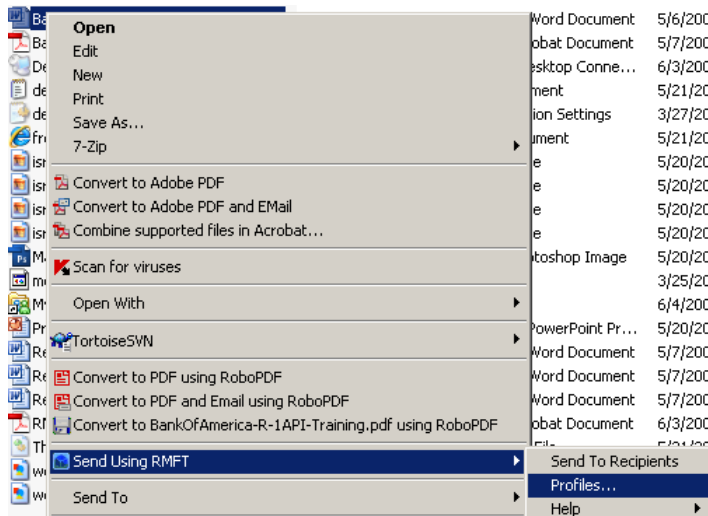
Your installation of Desktop Client should include at least one Profile. If your installation of Desktop Client does not include any Profiles, then you will need to create at least one Profile before you can send files. You can check whether any Profiles were included in your installation by right-clicking any file and then selecting **Send Using RMFT**. If the **Send As >** submenu item is present, your installation already includes a default Profile and you can start sending files immediately (For more information on selecting Profiles and sending files, see [2. Sending Files](#)). If the **Send As** submenu item is *not* present, you need to create a Profile.

You only need to create a Profile once; after that, RMFT Desktop Client will use the information in the default or selected Profile every time you send files.

If you have several user accounts on one RMFT Server or accounts on different RMFT Servers, you can create several different Profiles (one for each account). Files will be sent using your default Profile unless you specify otherwise.

**To create a Profile:**

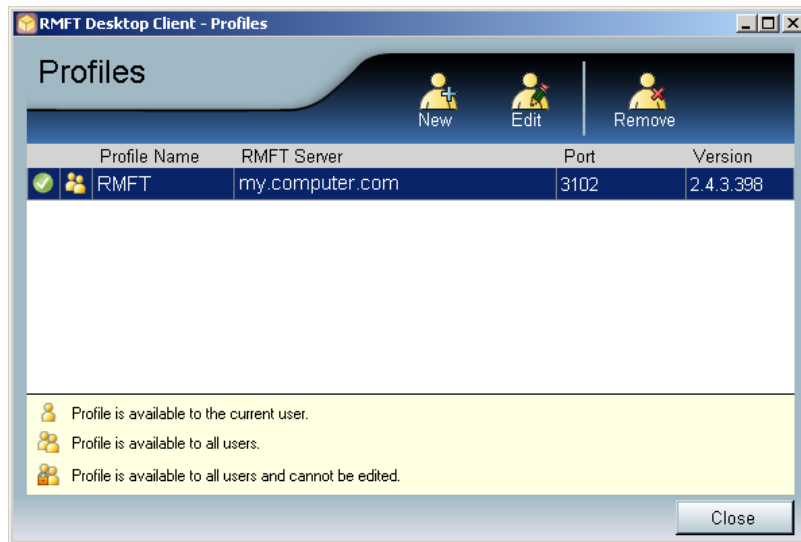
1. Right-click on any file and select **Send Using RMFT > Profiles...**



-OR-

Select **Programs > RepliWeb > RMFT Desktop Client > RMFT Desktop Client Profiles** from the Windows **Start** menu.

The **Profiles** window opens.



2. Click  **New**

- OR -


Right-click anywhere in the window and select **New** from the popup menu.

The **Edit Profile** window opens (shown filled in for illustration purposes).

**Note:** When you create a Profile, any errors will be indicated by a yellow warning triangle.

For information about the error, hover the mouse cursor over the yellow triangle. A tooltip will explain what caused the error (usually a missing value).

**3.** Create a Profile as follows:

- **Profile Name** Specify a unique Profile name. This will enable you to select the Profile if you do not want to use your default Profile (see below).
- **Default Profile** Select this check box if you want the current Profile to be used when no specific Profile is selected.
- **Shared Profile** Select this option if you want to make the profile available to other users on your computer. Shared profiles are indicated by a  icon in the **Profiles** window. If you do not select this option, the profile will only be available to you, even if RMFT Desktop Client is installed for all users.

**Note:** You can change the default Profile at any time by right-clicking a Profile and selecting **Set as Default** from the popup menu.

- **RMFT Server** Select either **Server Details** or **Server URL** according to the instructions that you received from your RMFT administrator.
  - **Server Details** If you select this option, specify the IP address or hostname of the RMFT Server machine (as provided by your RMFT administrator).

- **Port** The port through which RMFT Desktop Client communicates with RMFT Server. Do not change unless instructed to do so by your RMFT administrator.
- **Connection** The method RMFT Desktop Client uses to connect to RMFT Server. Only choose methods which have been approved by your RMFT administrator. If you are not sure which method to choose, contact your RMFT administrator.

- **Server URL** If you select this option, specify the RMFT Server URL (as provided by your RMFT administrator).

- **Proxy** Choose one of the following options as appropriate:
  - **None** If you select this option, RMFT Desktop Client will connect directly to RMFT Server
  - **Auto-Detect** If you select this option, RMFT Desktop Client will connect to RMFT Server as specified in your Windows settings (either directly or using a proxy server).
  - **Manual** Select this option to connect to RMFT Server via your organization's proxy server.
    - **Proxy Server** Specify the IP address or hostname of your proxy server.

- **Port** The port through which RMFT Desktop Client communicates with your proxy server. Do not change unless you are sure that you proxy port is different.

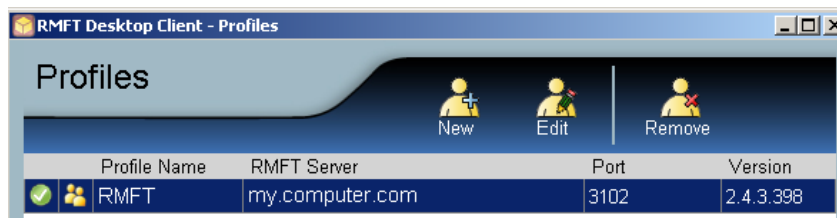
- **Use my Windows credentials** Select this option if you normally log in to RMFT Server using your Windows credentials. Note that this method uses Integrated Windows Authentication (also known as NTLM) to authenticate your identity to RMFT Server.
- **Use my RMFT credentials** Select this option if you normally log in to RMFT Server using your RMFT credentials or if you normally log in to RMFT Server using your Windows credentials but are currently logged in to your computer as a different user.

**Note:** If you are not sure which credentials to use, please contact your RMFT Administrator.

- **Username** Specify your RMFT username.
- **Password** Specify your RMFT password.
- **Save password** Select the check box if you do not want to be prompted for your password each time you send files.  
  
Leave the check box unselected If other people have access to your Windows account and you do not want them to be able to send files using RMFT.
- **Domain** Only applicable if you are an Active Directory RMFT user and did not select **Use my Windows credentials**. Specify your Active Directory domain name.
- **Test Connection** Click to test the connection to RMFT Server.

4. Click **Save**.

The Profile is added to the **Profiles** list.

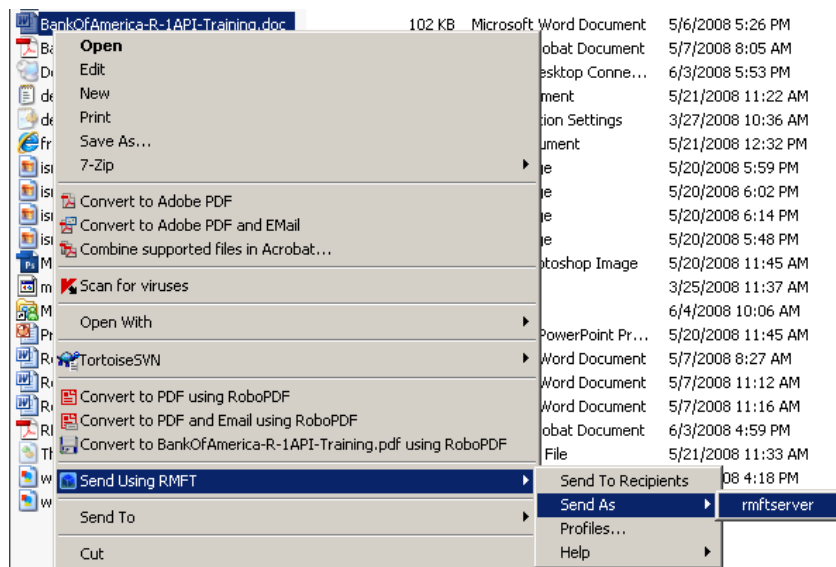


The icon to the left of the profile name indicates the profile type: private (👤), shared (👥) or shared read-only (👥🔒). Shared read-only profiles are profiles that have been installed on your computer by your RMFT administrator.

**Note:** The **Version** column displays the version of the RMFT Desktop Client server-side component. If you encounter any issues while using RMFT Desktop Client, make sure to include the version number when you report the problem to your RMFT administrator.

5. Click **Close**.

In Windows Explorer, a **Send As** submenu is added to the **Send Using RMFT** menu. Any Profiles that you created will appear in the **Send As** submenu.



For more information on using different Profiles to send files, see [2. Sending Files](#).

## Editing and Removing Profiles

### To edit a Profile:

- ◆ Select the Profile that you want to edit and then click the **Edit** button.

-OR-

Right-click the Profile that you want to edit and select **Edit** from the drop-down menu.

### To delete a Profile:

- ◆ Select the Profile that you want to delete and then click the **Remove** button.

-OR-

Right-click the Profile that you want to edit and select **Remove** from the drop-down menu.

# 2. Sending Files

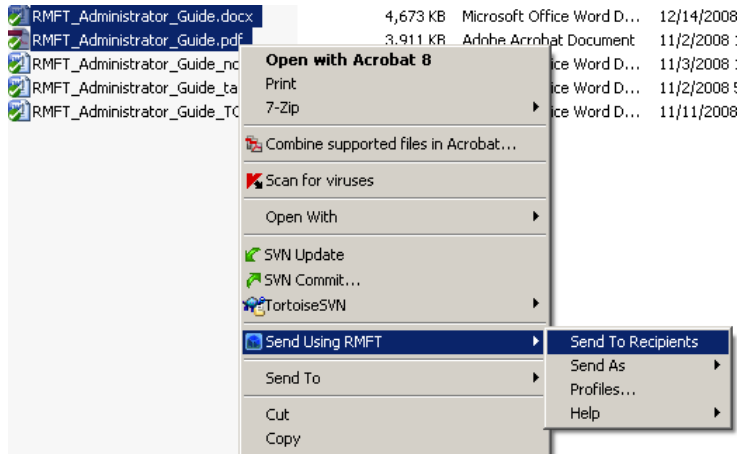
After creating a Profile you can now start sending files. There are two ways of opening the RMFT Desktop Client file-sending interface:

- a. Use the Windows Explorer right-click menu (explained in steps 1-3 below). This method is probably the most convenient method since you can send files using your default Profile or you can select another Profile. Additionally, using this method, RMFT Desktop Client opens with the files/folders that you selected ready to send.
- OR-
- b. Select **Programs > RepliWeb > RMFT Desktop Client > RMFT Desktop Client** from the Windows **Start** menu and then continue from step 4 below. All files will be sent using your current default Profile.

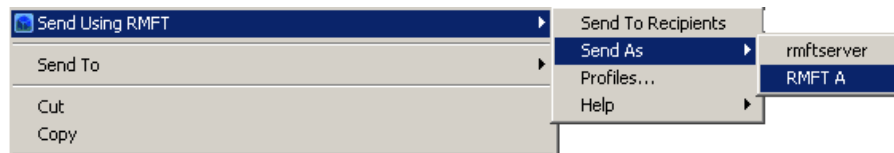
## Sending Files from Windows Explorer

To send files:

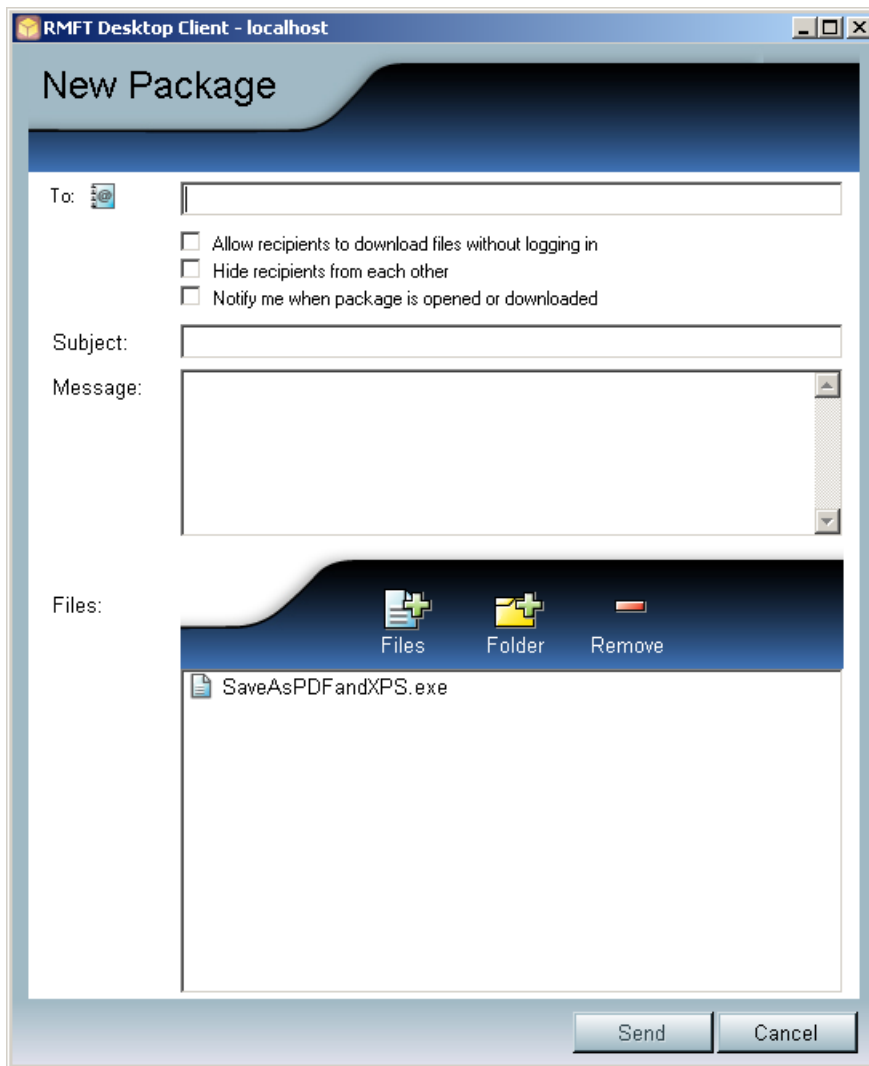
1. In Windows Explorer, select the files and/or folders that you want to send.
2. To send files using your [default Profile](#), right-click the files and/or folders and select **Send to Recipients**:



3. To send files using another Profile, right-click the files and select **Send Using RMFT > Send As**. Then select the Profile that you want to use (**RMFT A** in the example below).



The **New Package** window opens, displaying the files and/or folders that you selected.



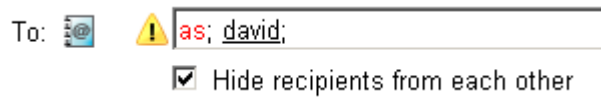
4. Fill in the fields as described below:

- **To** Specify at least one RMFT recipient. Recipients can be users or distribution lists. You may also be able to send packages to Ad Hoc users, depending on your account settings (which are determined by your RMFT administrator). An Ad Hoc user account is an account that is automatically created when a package is sent to an e-mail address that does not belong to an existing RMFT user. This enables authorized users to exchange packages with anyone who has a valid e-mail address.

To send a package to an Ad Hoc user, specify the recipient's e-mail address in the **To** field. Ad Hoc usernames are displayed in green font.

You can either choose recipients from the address book (recommended) or type them separated by a comma. In the case of RMFT users, files can either be addressed to the user's username or e-mail address.

Any errors will be indicated by a yellow warning triangle. The problematic username(s) will also be displayed in red font.



For information about the error(s), hover the mouse cursor over the yellow triangle. A tooltip will appear detailing the precise nature of the error. An error will be indicated if you:

- Specify an ambiguous user name (in this case, auto-complete will not know which user you meant)
- Specify a non-existing user name
- Leave the **To** field empty



See also [Choosing Recipients from the Address Book](#).

**Note:** Assuming that the recipient's RMFT account information also includes his/her email address, then there is no difference between sending to a recipient's e-mail address or sending to a recipient's user name. The e-mail address will be used by RMFT Server to identify the intended recipient.

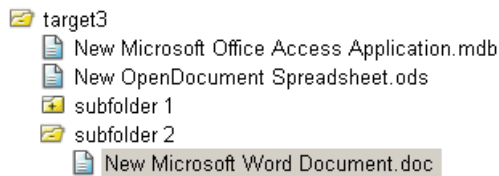
- **Allow recipients to download files without logging in** Select this option to allow recipients to download files without logging in. This option will only be displayed if it has been enabled by your RMFT administrator.


**Note:** Selecting this option makes it easier for the recipients to download the files, but it will also allow anyone with access to the recipients' computers to download the package files (since login is not required). Therefore, it is advisable to only select this option if the files that you are sending do not contain any confidential information.

- **Hide recipients from each other** Select this option to hide the package recipients from each other. This is useful if you do not want each recipient to know that the package was also sent to other recipients.
- **Notify me when package is opened or downloaded** Select this option to be notified whenever any of the recipients open or download the package. You will also be sent a summary of all recipient activity when the package expires (for example, which recipients opened and/or downloaded the package and which files were downloaded by each recipient) .
- **Subject** Optionally, type a subject (recommended). The subject should provide the recipients with some idea of the package contents.
- **Message** Optionally, compose a message.
- **Files** Optional. A list of all the files that you want to send. You can add files to the **Files** list using the **Files** and **Folders** buttons - or - by dragging the files and/or folders from Windows Explorer to the **Files** list.

-  Click to add files to the **Files** list.
-  Click to add folders to the **Files** list. You can add any number of folders. All files in the selected folders will be added to the **Files** list. If the selected folders contains subfolders, the subfolder files will also be added to the list.

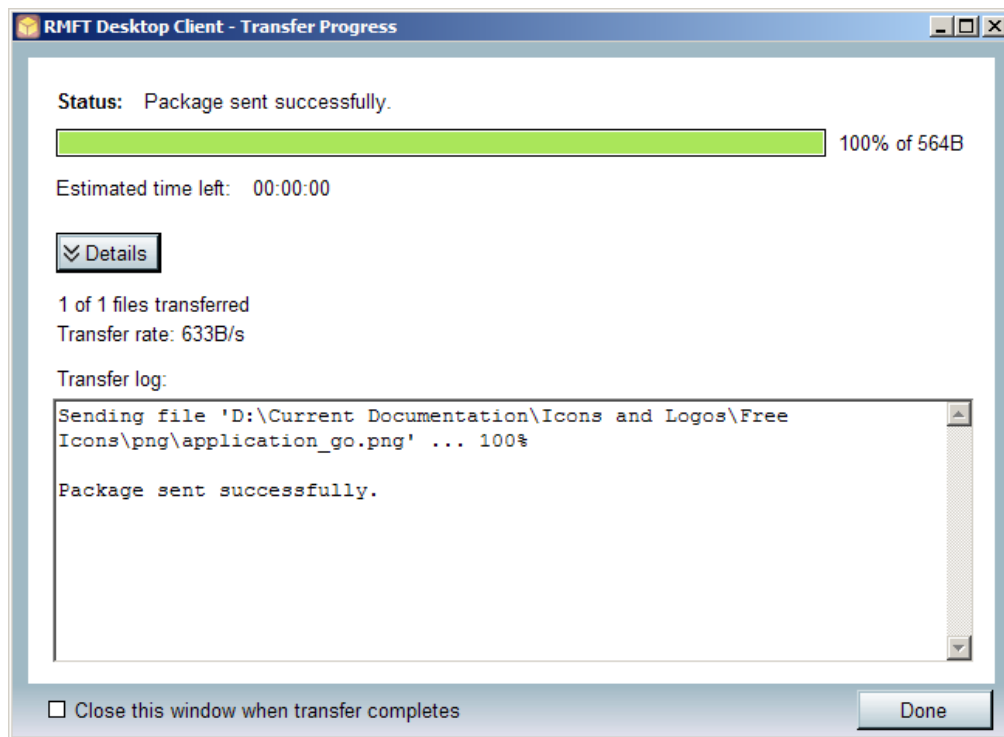
When you add a folder, the folder structure is replicated to the **Files** list. This enables you to drag and drop files from Windows Explorer to the folders in the **Files** list as well as enabling you to drag and drop files (that have already been added) between different folders *within* the **Files** list.



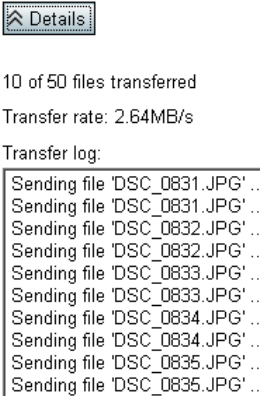
-  To remove files/folders, select the files and/or folders that you want to remove and then click **Remove**.

5. Click **Send**.

The **Transfer Progress** window opens.



The following table describes the information and options in the **Transfer Progress** window.

Option/Information	Description
Status	Displays the current status of the package, for example, “Sending”, “Sent” or “Error”. The “Sending” message contains the subject of the current package being transferred ( <b>New Accounts</b> in the figure above).
Progress Bar	Shows the transfer progress. The transfer progress in terms of percentage of total package size is provided at the end of the progress bar.
Estimated time left	The estimated time remaining until the transfer ends.
Details	<p>Click <b>Details</b> during or after the transfer to see additional information about the transfer such as how many out of the total number of files have been transferred and the transfer log.</p>  <p>The screenshot shows a 'Details' window with the following content:</p> <ul style="list-style-type: none"> <li>10 of 50 files transferred</li> <li>Transfer rate: 2.64MB/s</li> <li>Transfer log:             <ul style="list-style-type: none"> <li>Sending file 'DSC_0831.JPG' ..</li> <li>Sending file 'DSC_0831.JPG' ..</li> <li>Sending file 'DSC_0832.JPG' ..</li> <li>Sending file 'DSC_0832.JPG' ..</li> <li>Sending file 'DSC_0833.JPG' ..</li> <li>Sending file 'DSC_0833.JPG' ..</li> <li>Sending file 'DSC_0834.JPG' ..</li> <li>Sending file 'DSC_0834.JPG' ..</li> <li>Sending file 'DSC_0835.JPG' ..</li> <li>Sending file 'DSC_0835.JPG' ..</li> </ul> </li> </ul>
Cancel (switches to <b>Done</b> when clicked)	Click <b>Cancel</b> to abort the transfer.
Done	Click <b>Done</b> to close the <b>Transfer Progress</b> window.
Close this window when transfer completes	Closes the <b>Transfer Progress</b> window on successful completion of the transfer.

## Sending Files from a Microsoft Application

If opted to install the RMFT Desktop Client Send Menu Add-In, then you will be able to send files from supported Microsoft 2007 applications. Currently, the following applications are supported: Microsoft Word, Excel and PowerPoint. You can either send files using your default sending Profile or using another Profile (if you have several Profiles).

For more information about Profiles, see [1. Creating Profiles](#).

**Note:** When sending Microsoft Word documents, you will be prompted to save unsaved documents before RMFT Desktop Client opens. If you agree to let RMFT Desktop Client save the document, it will be saved to a temporary folder and deleted (from the temporary folder) after it is sent. Alternatively, you can manually save the document in its current location and then send it.

### Sending Files from Microsoft Word, Excel or PowerPoint

#### To send files using your default Profile:

1. Click the  (Office) button.

The **Office** menu opens.

2. Hover your mouse cursor over the **Send** item.

The **Send** menu opens displaying the RMFT sending options:



3. Click one of the following items as appropriate:

**Send to RMFT Recipient** to send the file as a Word file.

**Send as PDF to RMFT Recipient** to send the file as a PDF document.

**Note:** The **Send as PDF to RMFT Recipient** option requires the [Save as PDF or XPS](#) Add-In for Microsoft Office 2007 to be installed on your computer. If any of the supported Office programs is open when you install the Add-In, you will need to close and then reopen the application to see the **Send as PDF to RMFT Recipient** item in the **Send** menu.

RMFT Desktop Client opens.

4. Continue from [Step 4 of Sending Files](#).

**To send files using a different Profile (not the default):**

1. Follow [steps 1-2 above](#).
2. Hover your mouse cursor over one of the following items as appropriate:

**Send to RMFT Recipient** to send the file as a Word file.

**Send as PDF to RMFT Recipient** to send the file as a PDF document.

A sub-menu opens displaying the available Profiles.



3. Click the Profile that you want to use.  
RMFT Desktop Client opens.
4. Continue from [Step 4 of Sending Files](#).

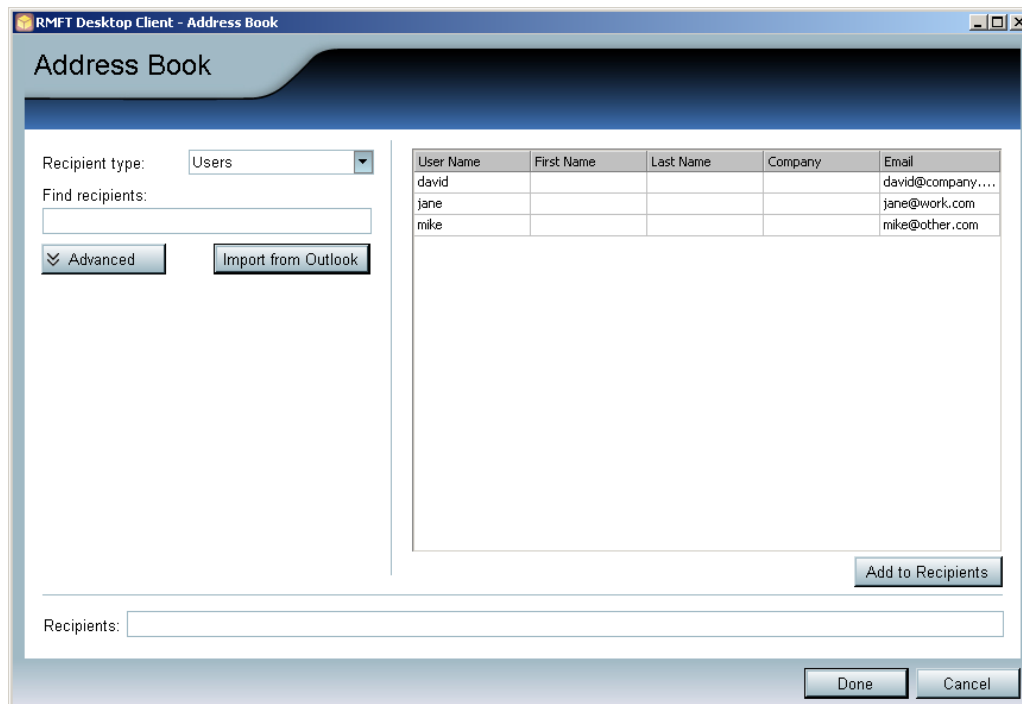
## Choosing Recipients from the Address Book

Choosing recipients from the address book is recommended since it eliminates the possibility of mistyping the recipient's name. It is also more convenient to choose the recipients from the address book when sending files to multiple RMFT recipients or if you cannot remember a recipient's user name (or e-mail address).

### To choose recipients from the address book:

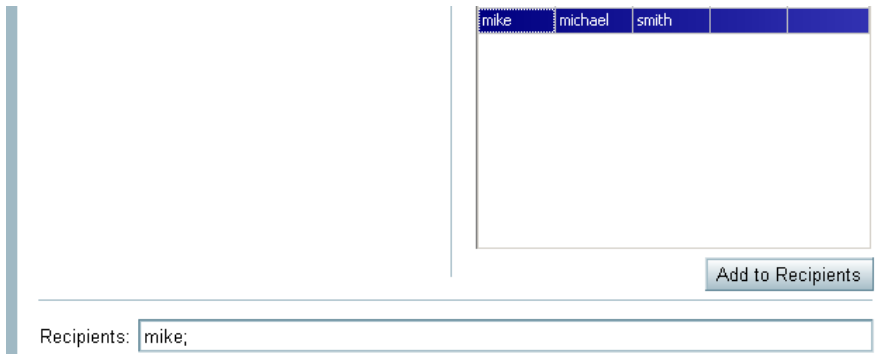
1. Click the  button.

The **Address Book** opens.



2. From the **Recipient type** drop-down list, select **Users** to see a list of users to whom you are permitted to send files or select **Distribution Lists** to see a list of distribution lists to which you are permitted to send files.
3. To select a single recipient:
  - a. Double-click the recipient.

The recipient is added to the **Recipients** field at the bottom of the **Address Book** window.



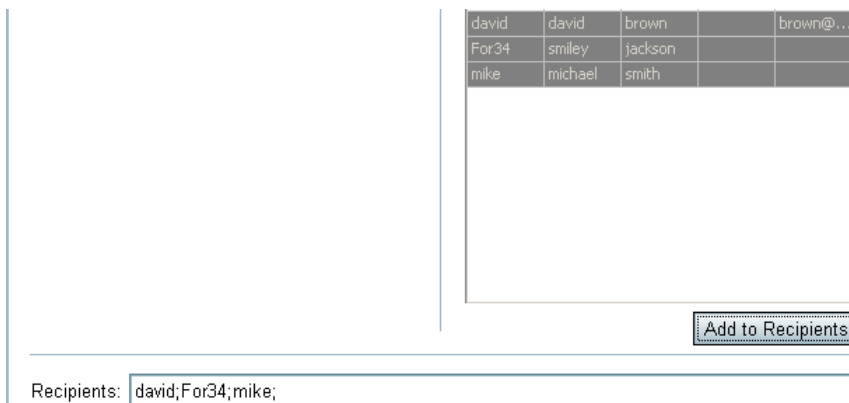
b. Click **Done**.

4. To select multiple recipients:

a. Hold down the [Ctrl] or [Shift] keys while selecting the recipients.

b. Click **Add to Recipients**.

The recipients are added to the **Recipients** field.



c. Click **Done**.

5. To select recipients from your Microsoft Outlook 2007 address book, click **Import from Outlook**. Select the recipients to which you want to send the package and then click **OK**.

The recipients are added to the **Recipients** field at the bottom of the RMFT Desktop Client **Address Book** window.

## Searching for Recipients

There are two types of search: **Basic** search and **Advanced** search. Basic search enables you to find recipients by typing the first few letters of one of the recipient’s properties (for example, typing “st” will find all recipients whose user name, first name, last name, company name or e-mail address begins with “st”). Advanced search enables you to find recipients by using specific search criteria (for example, find all RepliWeb employees) .

### Basic Search

In the example below, the user can only remember that the recipient’s last name begins with “sm”.

Recipient type:  ▼

Find recipients:

User...	First ...	Last ...	Com...	Email
aa				
abi				abi@org...
david	david	brown		brown@...
For34	smiley	jackson		
mike	michael	smith		

The user types “sm” in the **Find recipients** field and the list of recipients is dynamically updated to show only those recipients with *at least one property* that matches the prefix “sm”. Recipient **For34** is a match because his first name is “smiley” and recipient **mike** is a match because his last name is “Smith”.

Recipient type:  ▼

Find recipients:

User...	First ...	Last ...	Com...	Email
For34	smiley	jackson		
mike	michael	smith		

## Advanced Search

To use the advanced search options, click **Advanced**.

In the example below, the user knows that the recipient’s last name begins with the letter “S”. He therefore uses the advanced search option to quickly find the recipient. Note that the list is dynamically updated to display matches for the inputted text. Continuing with the example, as soon as the user types the letter “s” all recipients whose last name begin with “s” are displayed (in this case, only one).

Recipient type:

Find recipients:

Find recipients that match the specified criteria:

First name:

Last name:

Company name:

RMFT user name:

Email address:

User...	First ...	Last ...	Com...	Email
mike	michael	smith		