
**EBS File Transfer
Tool - User
Manual**

December 2007

Employee Benefit Solutions, Inc.

PARTNERING TO MAKE A DIFFERENCE IN EMPLOYEE BENEFITS

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Overview

The EBS File Transfer Tool is available in the EBS Web Portal. The tool allows EBS Portal users to securely transfer files and automatically send notifications to other File Transfer Tool users. Here are some details regarding the EBS Web Portal and File Transfer Tool:

- File Transfer Tool users must be registered EBS Portal users. The following verifiable information is required for registration:
 - User's Full Name
 - Company Name
 - Telephone Number
 - Company Email Address

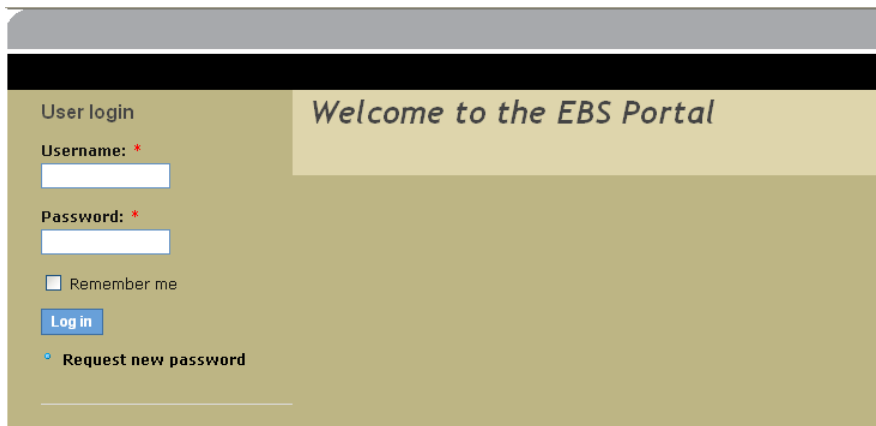
Note: User Registration must be processed at least three (3) business days in advance of using the EBS Portal. Parties (clients and vendors) that have a long-standing or previously established relationship with EBS may be registered as EBS Portal users automatically at EBS's discretion.

- Email notifications are sent as standard text e-mails to the e-mail address on file for each contact. These email notifications will not contain any sensitive information.
- As the EBS File Transfer Tool is a transfer system and not an archive, users have 30 days to download a file. After this period of time, the file will become unavailable.
- All parties must agree to the EBS Portal Usage Policy upon the initial use of the EBS Portal.
- It is preferred that all EBS Portal clients or vendors have separate user registrations for accountability purposes and additional security. Similarly, please notify EBS if a Portal registration (user account) should be terminated.

Login

The EBS Portal is available at <https://ebenefitsolutions.com/cms/>.

1. Enter your Username and Password
2. Select the Remember me check box next to have the system remember your password for future logins.
3. Click the **Log in** button.



The screenshot shows the login interface of the EBS Portal. On the left, there is a 'User login' section with a 'Username: *' field, a 'Password: *' field, a 'Remember me' checkbox, a blue 'Log in' button, and a link for 'Request new password'. On the right, a yellow banner reads 'Welcome to the EBS Portal'.

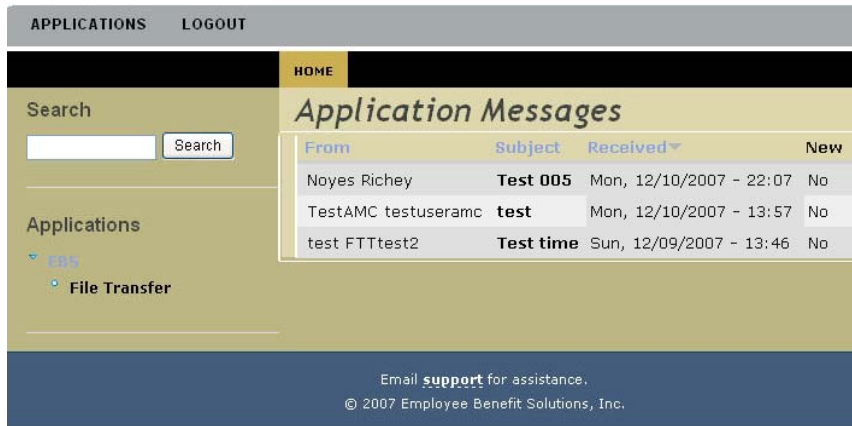
4. Click on the **Applications** link to access the EBS applications.



The screenshot shows the 'Applications' page of the EBS Portal. At the top, there are 'APPLICATIONS' and 'LOGOUT' links. Below, there is a search bar with a 'Search' button. A yellow banner reads 'Welcome to the EBS Portal in Extranet'. At the bottom, there is a footer with the text 'Email [support](#) for assistance. © 2007 Employee Benefit Solutions, Inc.'

Application Messages

Application Messages is an inbox that displays all notifications sent to your account. The inbox is automatically displayed upon accessing Applications but can be accessed at any time by clicking on **EBS** from the Application menu.



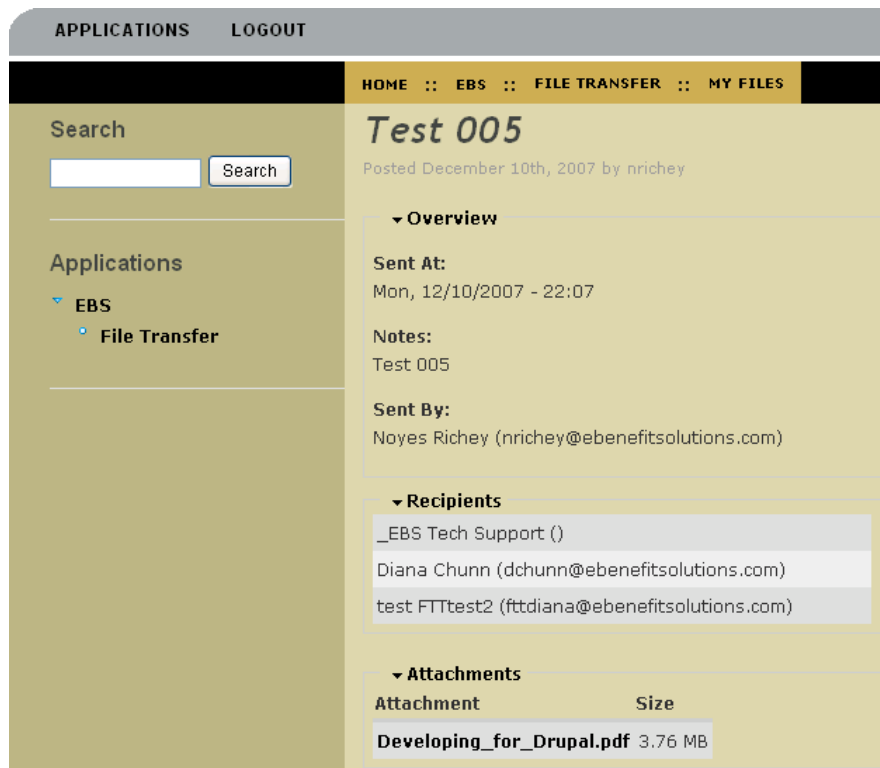
From is the party that sent the e-mail

Subject is what the sender entered into the subject when the file was transferred.

- Click on the subject of the e-mail to access the message.
- Click on the link under Message to access the file transfer



- You may open or save the file to your computer.
 - Open the file by double clicking on the name of the file.
 - Right click on the file and select **save as** to select where to save the file.

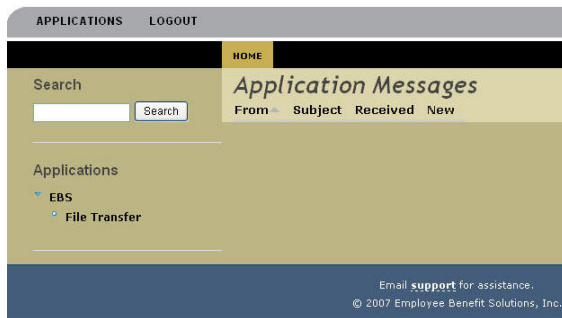


Received is the day, date, and time the e-mail or file transfer was received

New will display **Yes** until the e-mail is read and then will display as **No**

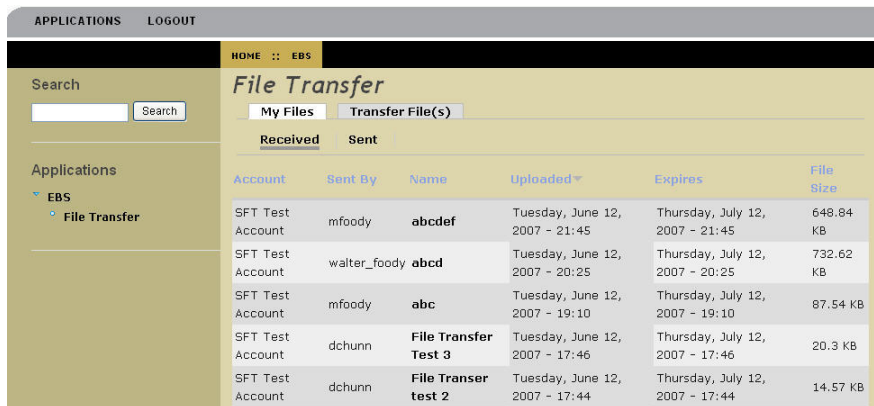
File Transfer Tool

Click on **File Transfer** from the Applications menu to view the following two tabs: My Files and Transfer File(s).



My Files (Tab)

My Files is where the client, vendor, or EBS employee will access files transferred to or sent from their account.



My Files Tab fields defined

Received/Sent displays file transfers received or sent during the last 30 days. Depending upon your access rights, this list may contain all files for the company or only the items received by the current user.

Account is the company name associated with a file transfer.

Sent by identifies the sender's name for each file transfer.

Note: **Sent by** is not available on **Sent** screen.

Name is the description entered into the **Subject** field when the file was transferred to the EBS Portal.

Click on the **Name** of a file transfer session to download a file to your system.

Uploaded reflects the day, date, and time the file was uploaded.

Expires reflects the day, date, and time an uploaded file will expire and no longer be accessible.

File Size displays the total file size of the document for this file transfer.

Note: Click on the column titles to sort lists by a single field in Ascending or Descending order.

Transfer File(s) (Tab)

The EBS File Transfer Tool will not accept files larger than 150MB. You may want to compress files with a product like [WinZip](#) (not provided) before transferring them with the EBS File Transfer Tool for the following reasons:

- Transfers will take less time if they are compressed
- Multiple files may be included in a single transfer session
- It is possible to send much more than 150 Mbytes using the EBS Transfer Tool as long as the compressed file size does not exceed the 150 Mbytes limit
- The larger a file the more prone it is to transfer difficulties. Compressing the file reduces this potential for difficulty

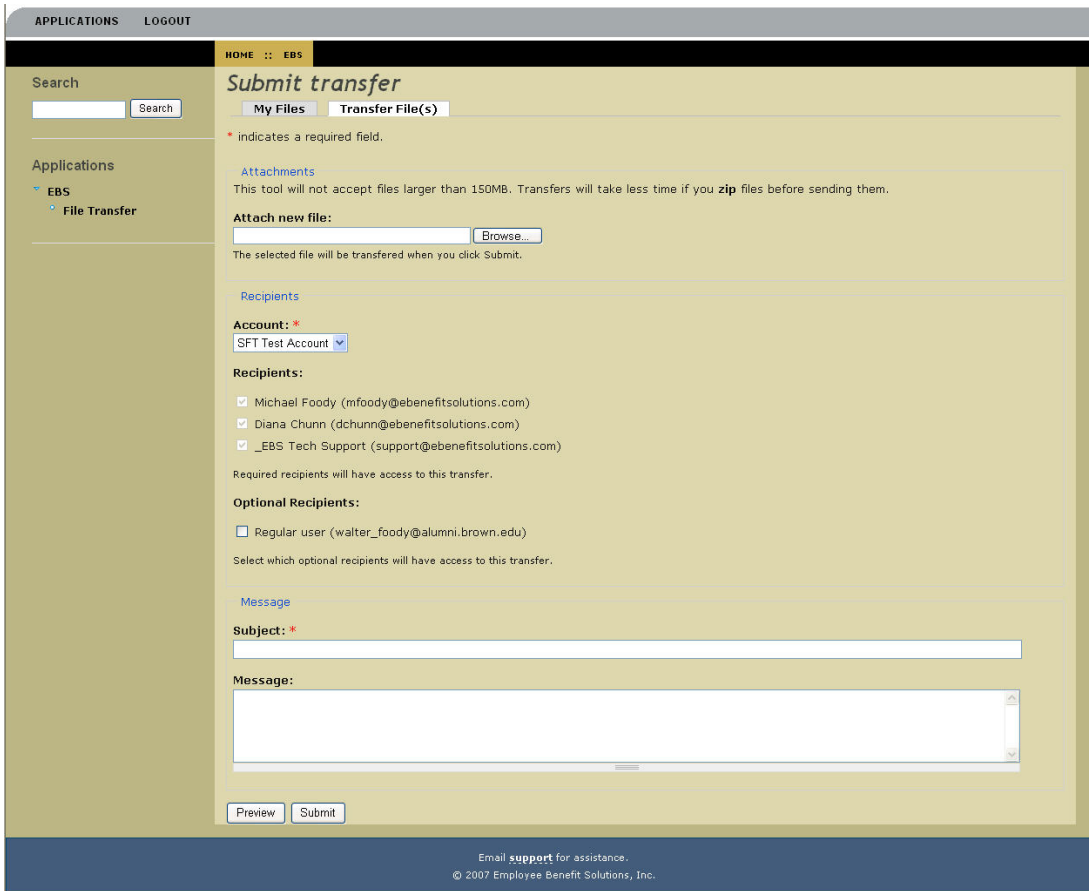
File Compression Reminder:

Create the compressed file and test its integrity before transferring it with the EBS File Transfer Tool. Doing so will reduce the likelihood that transfer recipients attempt to open a damaged file.

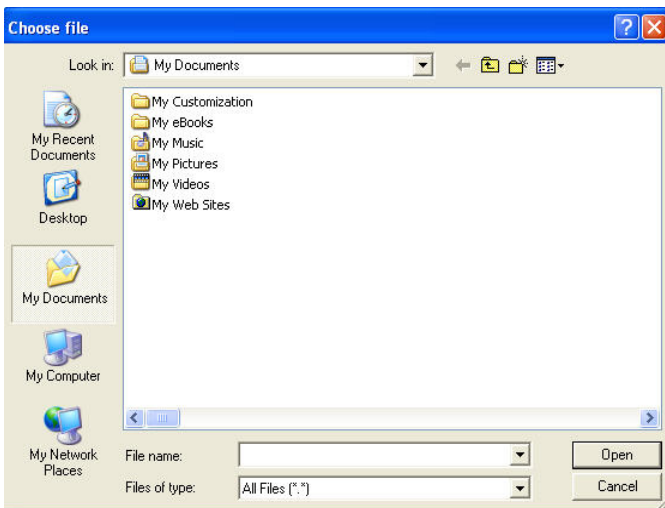
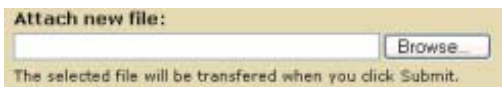
Note: WinZip is not provided by EBS

Sample Procedure for using the EBS File Transfer Tool

1. Click the **Transfer File(s)** tab.



2. To attach a file click the **Browse** button to locate and select the file to transfer. Only select one file and click the Open button. Reminder: Create the zip file prior to attaching the file.



- Use the drop down list to select the **Account** (company name) to receive the file. There may only be one company listed.
- The individuals in the **Recipients** list will automatically receive the file transfer.

Recipients:

- Michael Foody (mfoody@ebenefitsolutions.com)
- Diana Chunn (dchunn@ebenefitsolutions.com)
- _EBS Tech Support (support@ebenefitsolutions.com)

- Select the box next to any **Optional Recipients** listed to grant them access to the file transfer. Optional recipients will also receive an email notification when a file is transferred.

Optional Recipients:

- Regular user (walter_foody@alumni.brown.edu)

Select which optional recipients will have access to this transfer.

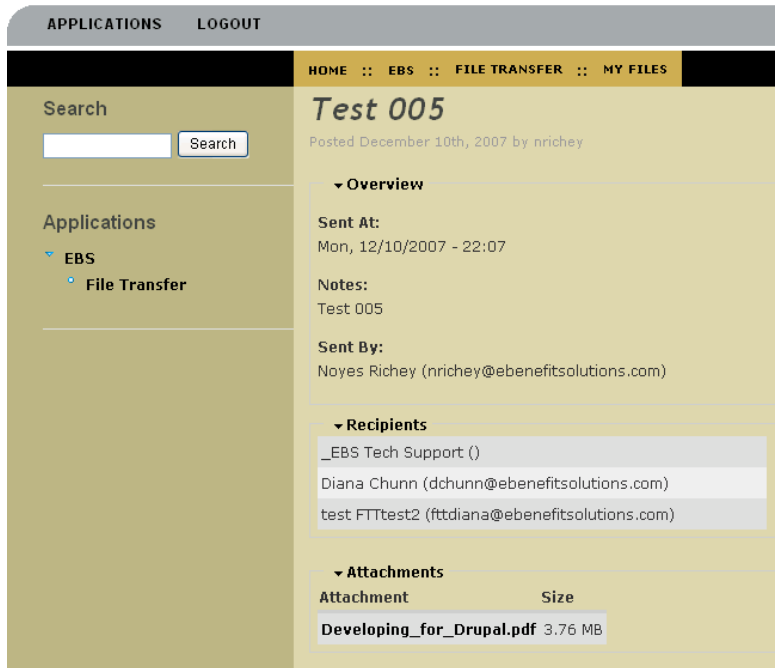
- Enter a **Subject**. The Subject is the name or a brief description of the transferred file. Reminder: What you enter into this field will display as the **Name** under **My Files Received** and **Sent** screens on the receivers end.

Subject: *

- Enter additional instructions or descriptive information concerning the file transfer in the **Message** field.

Message:

- Click on the **Submit** button to complete the file transfer. Once the file is sent an overview of the file transfer will appear.



9. A copy of the file transfer is available under **File Transfer | My Files | Sent** for 30 days.
10. The following email is sent to the recipient's regular email:

New file available on the EBS Portal :: Testing 123

angela@ebenefitsolutions.com

To: TechSupport

Here is a test file

This email is to notify you that a file is available for download in the Employee Benefit Solutions, Inc. Secure Portal. Click the link below to access the file. <https://ebenefitsolutions.com/cms/ebs/transfer/files/950>. This file will be available for the next 30 days.

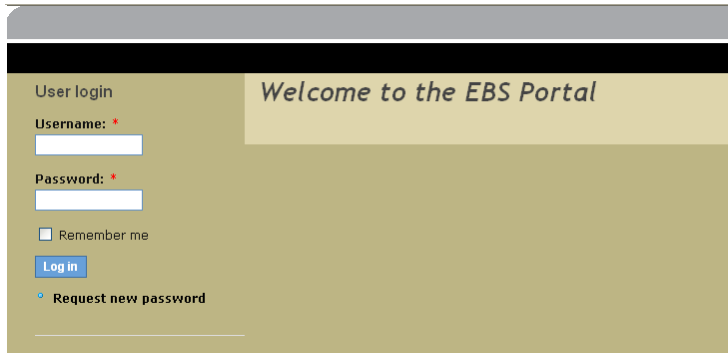
This transmission and all attachments are the copyrighted materials of Employee Benefit Solutions, Inc. Content may contain material that is confidential, privileged and/or a work product for the sole use of the intended recipient. Any review, reliance or distribution by others or forwarding without express permission is strictly prohibited.

11. The receiver can access the file by clicking on the link included in the email.

Reset Password

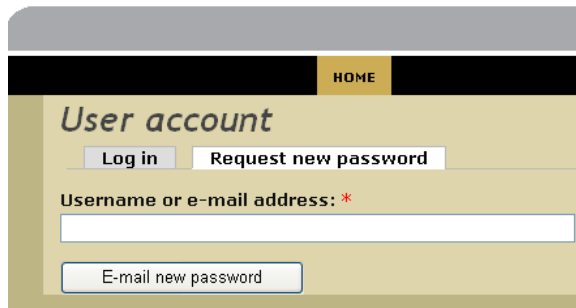
Access <https://ebenefitsolutions.com/cms/>.

1. Click on **Request new password** just below the login button



The screenshot shows the 'User login' section of the EBS Portal. It includes a 'Welcome to the EBS Portal' message. The login form contains a 'Username: *' field, a 'Password: *' field, a 'Remember me' checkbox, a 'Log in' button, and a link for 'Request new password'.

2. Enter the email address and click on **E-mail new password**



The screenshot shows the 'User account' section of the EBS Portal. It includes a 'HOME' link in the header. The 'User account' section contains a 'Log in' button, a 'Request new password' button, a 'Username or e-mail address: *' field, and an 'E-mail new password' button.

3. An email is sent to the specified email address with a one time only temporary password. It expires after one day and nothing will happen if it's not used.

From: Sent: Tue 10/9/2007 7:26 AM
To: Diana Chunn
Cc:
Subject: Replacement login information for dchunn at Employee Benefit Solutions, Inc.

dchunn,

A request to reset the password for your account has been made at Employee Benefit Solutions, Inc..

You may now log in to [/ebenefitsolutions.com/cms](https://ebenefitsolutions.com/cms) clicking on this link or copying and pasting it in your browser:

<https://ebenefitsolutions.com/cms/user/reset/3/1191932770/3ce36e5f7686dfcfac3dba5f1dba2f44>

This is a one-time login, so it can be used only once. It expires after one day and nothing will happen if it's not used.

After logging in, you will be redirected to <https://ebenefitsolutions.com/cms/user/3/edit> so you can change your password.

Support

Please use the Support email link at the bottom of each Portal page to report problems with the EBS Portal or EBS File Transfer Tool.

Email [support](mailto:support@ebenefitsolutions.com) for assistance.
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You may also directly email support@ebenefitsolutions.com