
File Vault

User Guide – March 2015



Overview

File Vault is a secure file depository available to all company and financial institution users. The service is first entitled to the company and then to individual users. Once entitled, there are no additional settings that must be established for the company or its users.

File Vault is perfect for storing and accessing forms, reference material, applications, and other such documents that may be commonly requested and shared among a company or financial institution. During implementation, the financial institution and Online Banking Solutions (OBS) coordinate to determine a size limit for individual files and the file number capacity for the service as a whole.

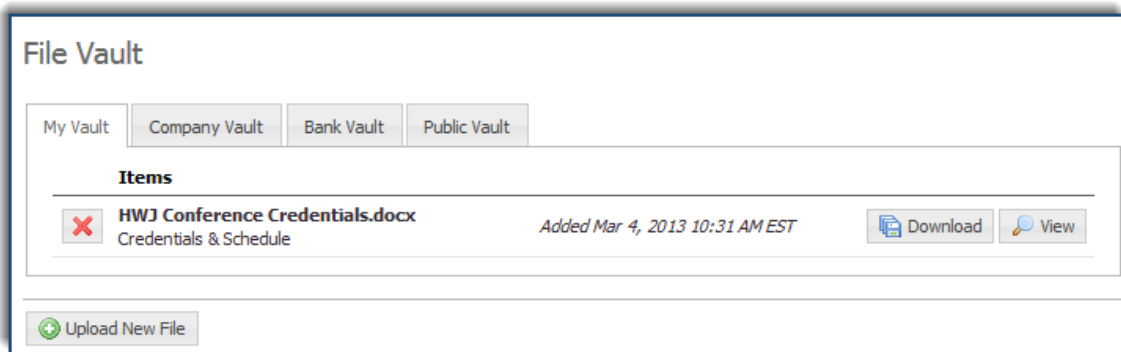
Default Limits

- 10 MB per file
- 10 MB per vault (My Vault, Company Vault, Bank Vault, Public Vault)

This document will discuss the types of vaults available, what users will have access, how to upload a file, and how to perform File Vault maintenance.

Types of Vaults

To access, select the My Settings tab and click the File Vault option from the menu that displays. At this time, the four available vaults will be displayed as tabs.



My Vault is a location that is only accessible to the user. Although every individual user has a My Vault, each one is its own, isolated instance. Other company and financial institution users cannot access this vault. Therefore, when a user loads a file into his/her My Vault, it may only be viewed, downloaded, and deleted by that same user.

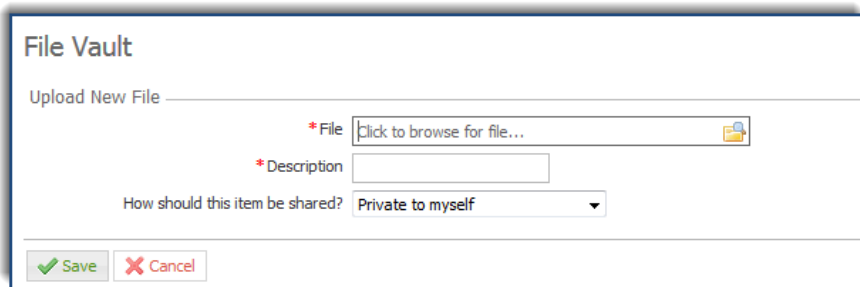
The **Company Vault** allows the user to upload a file that may be accessed by all users of his/her company. Files loaded into this vault may be viewed, downloaded, and deleted by any user within the company.

Files loaded into the **Bank Vault** are available to all company users and financial institution administrative users and may be viewed, downloaded, or deleted by any of them.

The **Public Vault** contains files loaded by the financial institution that are available to all companies and their users. Items may be placed in or deleted from this vault by financial institution administrative users only, but may be viewed and downloaded by any user.

Utilizing the Vaults

To upload a file, select **Upload New File** located at the bottom of each vault.

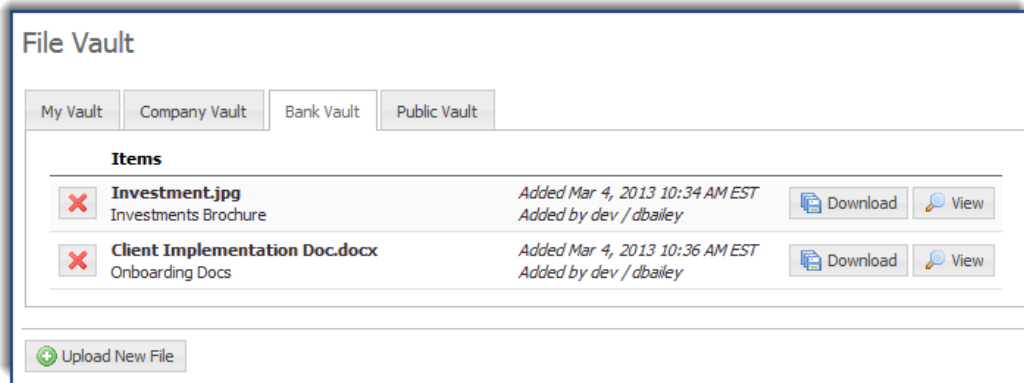


The screenshot shows a web form titled "File Vault". At the top, there is a link "Upload New File". Below this, the form has three main fields: a file selection field labeled "* File" with a "Click to browse for file..." button and a folder icon; a text field labeled "* Description"; and a dropdown menu labeled "How should this item be shared?" with "Private to myself" selected. At the bottom of the form are two buttons: a green "Save" button with a checkmark icon and a red "Cancel" button with an 'X' icon.

Next, click the **File** field and navigate to and then select the desired document in the window that displays. The name of the selected file will now display in the field. Now enter a brief **Description** about the file in the field provided. Lastly, determine which vault the file should be placed in based on which of the three options is selected in the **How should this item be shared?** field. If **Private to myself** is selected, the file will be placed in the user's My Vault. If **My entire company** is selected, the file will be saved to the Company Vault. Selecting **My entire company and bank employees** will place the file in the Bank Vault.

Once all fields have been completed, select **Save** to add the file to a vault, or **Cancel** to discard the file.

To view a file that has been uploaded, select the tab of the vault in which the file has been saved. To the far left of each file in My Vault, Company Vault, and Bank Vault is a red **X** icon to allow the file to be deleted.



Once selected, a window will populate asking the user to confirm that the file should be deleted.

The name of the file will display above the description that was entered. Next, the date and time that the file was added will display above the company and user ID of the individual who uploaded the file.

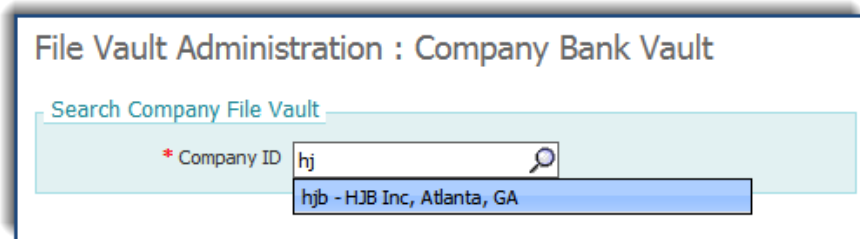
To download the file, select the **Download** button the left. To view the content of the file, select the **View** button to the far left.

File Vault Administration

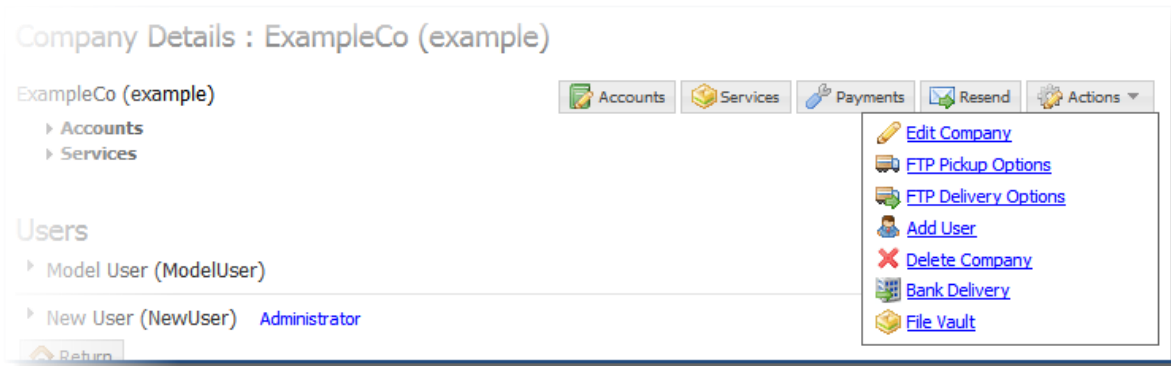
Financial institution users can access companies' Bank Vaults and upload or delete files from the Public Vault through File Vault Administration. To access these services, select the **Administration** tab from the main menu and then click **File Vault Administration**.

Company Bank Vault

Files that company users place in their Bank Vault are made available to their financial institution. To view the files of a company, select **Company Bank Vault**. Next, begin typing the **Company ID** in the field provided and then select the desired option from the menu that populates.



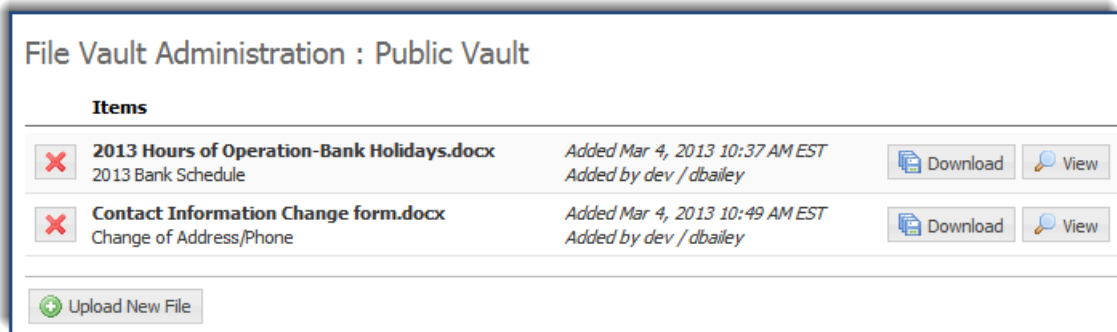
A company's Bank Vault may also be accessed directly from its profile. To do so, navigate to the company's profile page, select **Actions**, and then click the **File Vault** option from the menu that displays.



At this time, all of the files that have been loaded in the company's Bank Vault will be displayed. For more information about how to upload, delete, view, or download a file, please refer to the *Utilizing the Vaults* section of this document.

Public Vault

As stated before, only financial institution users may add or remove files from the Public Vault. To perform one of these functions, select **Public Vault**.



The features for the Public Vault are the same as the features offered for any other vault at the company user level. For more information about how to upload, delete, view, or download a file, please refer to the *Utilizing the Vaults* section of this document.

Note: When uploading a file to the Public Vault, no **How should this item be shared?** field is available because the system already knows in which vault to save the file.