

lockbox

eBox Client User Guide

Version 4.6

July 2010

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Introduction

Welcome to lockbox, the online file transfer site which allows you to exchange information with your business partners simply and securely.

In today's business world, files are sometimes too big to email and other systems for file transfer can be complex (especially if firewalls are involved), making critical business information hard to transmit securely. Lockbox addresses these problems by allowing you to upload files of any size or type directly to the secure lockbox, from where they can be retrieved. And as files are encrypted by lockbox on your computer prior to upload, they can **only** be read by authorised people.

We trust that this manual will help you get up and running with lockbox as quickly as possible, whether you're a computer novice or an IT guru.

We have captured a number of screen shots to assist you through our process. We believe that our process is intuitive and self-explanatory as you progress, but we provide this manual as an ongoing reference guide.

As always, we welcome your feedback and suggestions and if you need to contact us, please feel free to call us on 1300 LOCKBOX (1300 562 526), (or +61 3 8611 3910 if outside Australia) during business hours. You can also email us on support@lock-box.net.

STEP 1: Check your OS and Java versions

If you're on a PC:

You will need to have a minimum of Java version 5 or later enabled on your PC to run lockbox. Use the following URL to check your Java version and update and/or install if you need to:

<http://www.java.com/en/download/installed.jsp>

The screenshot shows the Java website interface. At the top, there is a search bar and navigation links for 'Java in Action', 'Downloads', and 'Help Center'. The main content area features a sidebar with 'HELP RESOURCES' and 'SEARCH JAVA HELP' sections. The main article is titled 'How do I test whether Java is working on my computer?'. Below the article title, there is a 'Printable Version' link. The article text includes a list of supported platforms and browsers. A prominent message box states 'Your Java is working Java update available' and lists the user's current configuration: Vendor: Sun Microsystems, Inc., Version: Java 6 Update 15, Operating System: Windows XP 5.1, Architecture: x86. Below this message, there are instructions for troubleshooting if the applet is not displaying properly and a link to download and installation instructions. At the bottom of the page, there is a footer with links for 'Select Language', 'Java Wear', 'Newsletter', 'About Java Technology', 'Partner with Us', 'Developers', 'Privacy', 'Terms of Use', 'Trademarks', 'License', 'Disclaimer', and 'Support', along with the Sun logo.

If you're on a Mac:

You will need to have a minimum of OS version 10.5 or later and a recent version of Java on your Mac to run lockbox.

Firstly check your operating system version is >10.5. Select the Apple icon on the top left of your screen, then select "About This Mac". You will see a window similar to the one below, which contains your operating system (OS) version number.



Assuming your OS version is >10.5, you can run “Software Update” either from the “About This Mac” window or directly from the Apple icon in the top left of your screen. This will ensure you have a recent version of Java installed.

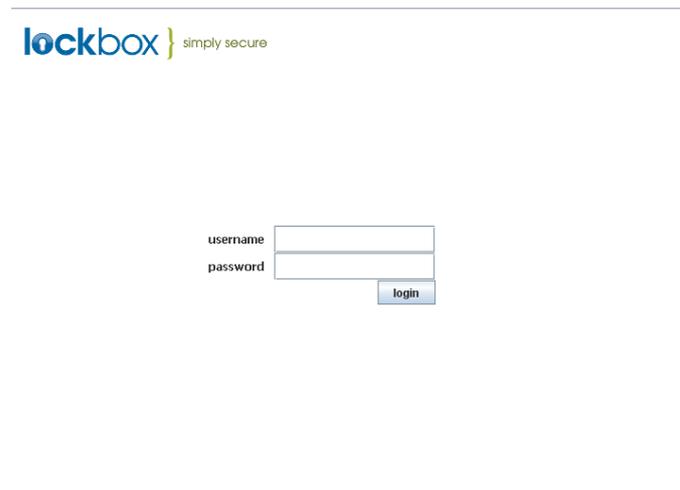
Note: if you are running MAC OS <10.5 you will not be able to run lockbox without an OS upgrade. Please consult your supplier or IT administrator.

STEP 2: Log in

You will be logging in to a lockbox through a direct URL provided to you by the owner of that box or may be a link on the business web site. You should have been given a username and initial password – please contact the business owner if you do not have all of these things.

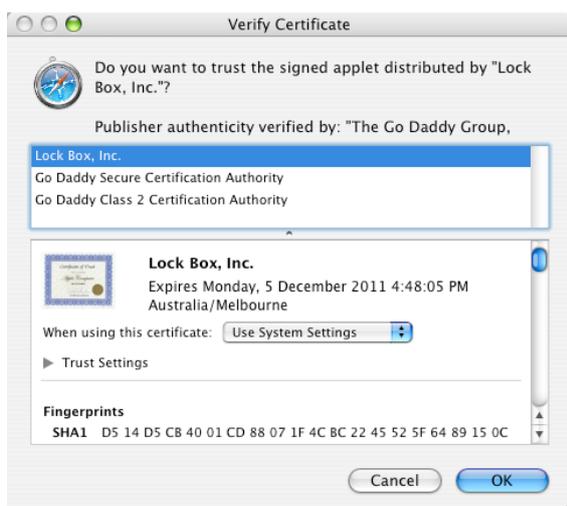
SCREEN 1 – Login

To log in, first navigate to the URL you were provided for the lockbox – the screen should look similar to the one below. Then enter your lockbox username and password on screen.



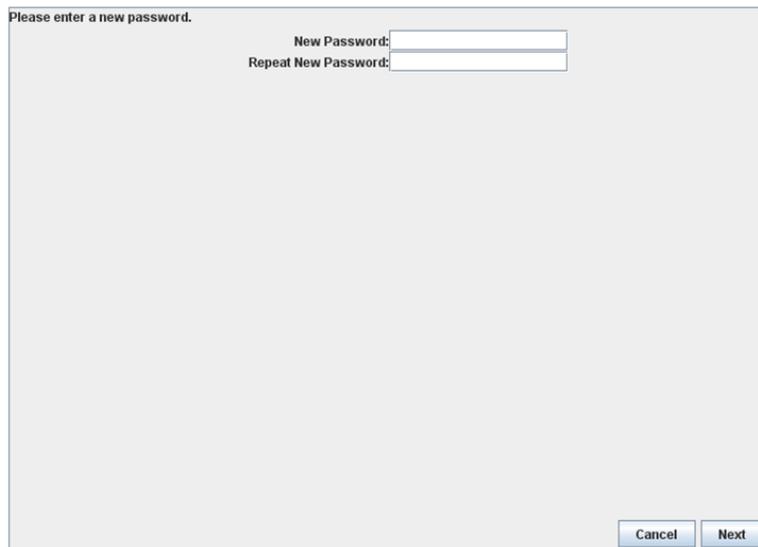
SCREEN 2 – Security settings

If it is your first time using lockbox the security settings on your computer may require you to accept a certificate or to trust lockbox. Should you see a window similar to those shown below, please tick the box and select “OK” or “Run” as directed.



SCREEN 3 – Change password

You have successfully launched your lockbox and if it is your first time you may see a screen similar to the one below requiring you to change your password. Enter a new password and select “Next” to confirm.



Please enter a new password.

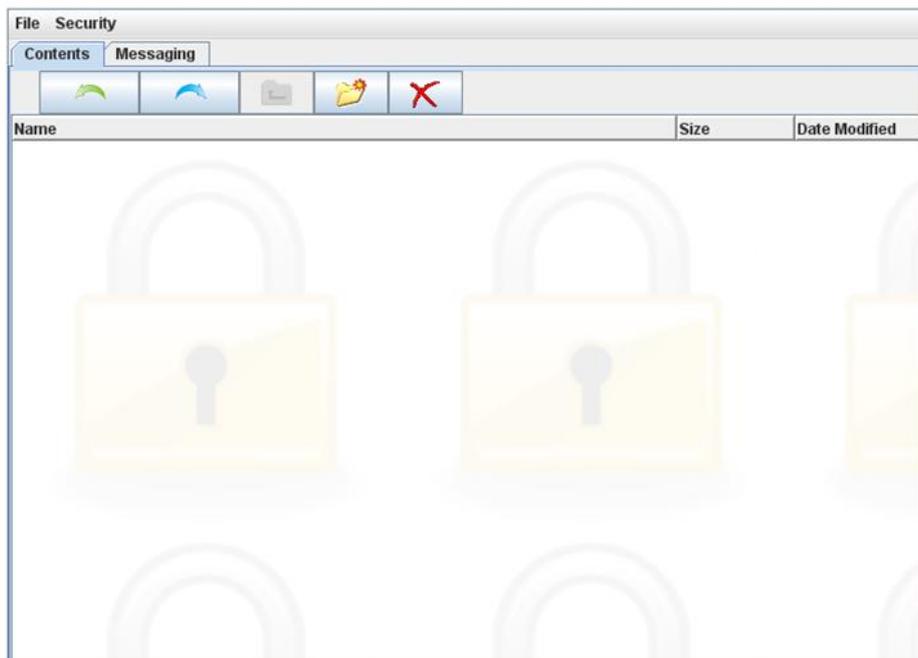
New Password:

Repeat New Password:

Cancel Next

SCREEN 4 – User interface

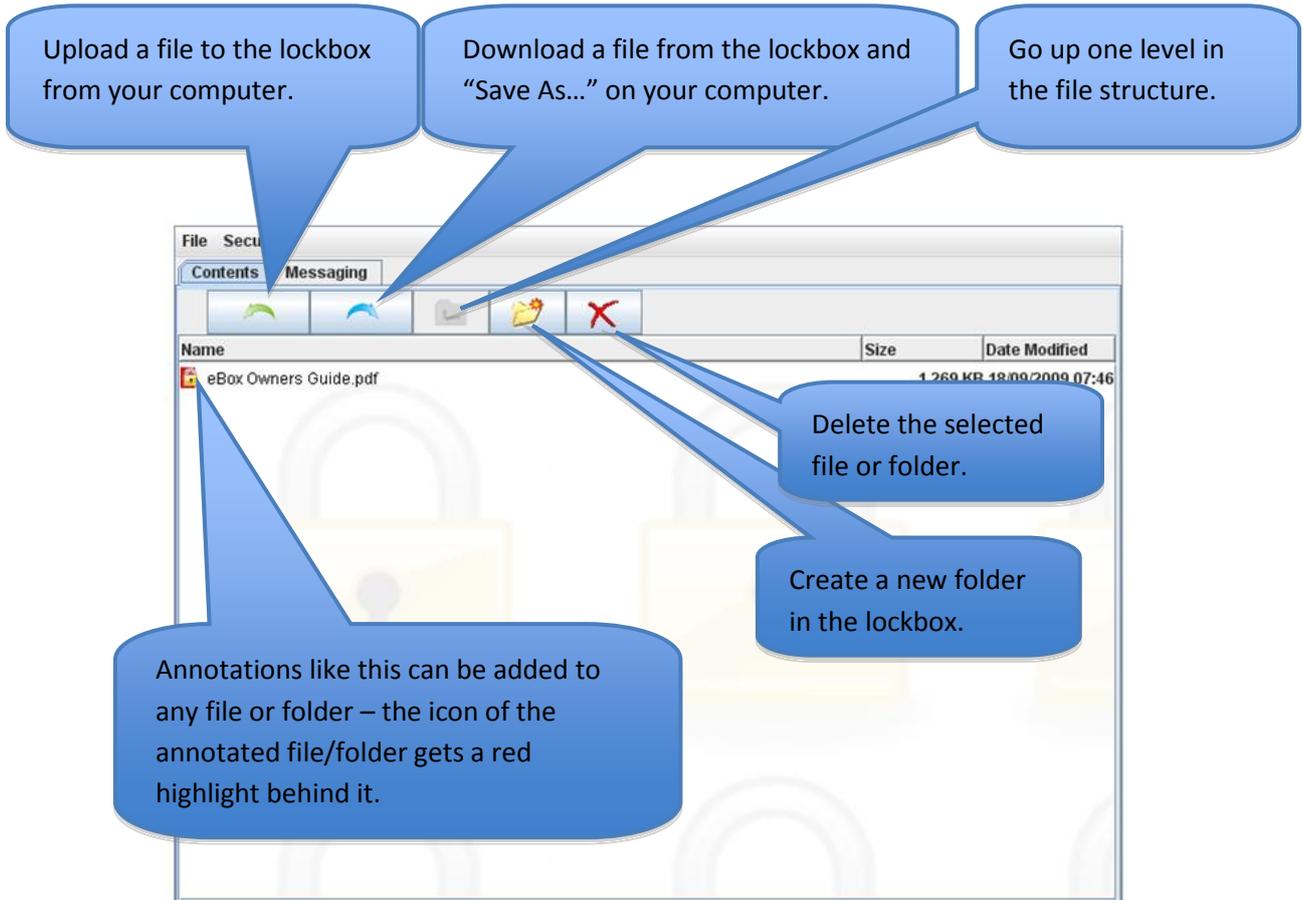
Congratulations! You are ready to begin using lockbox.



STEP 3: Managing lockbox contents

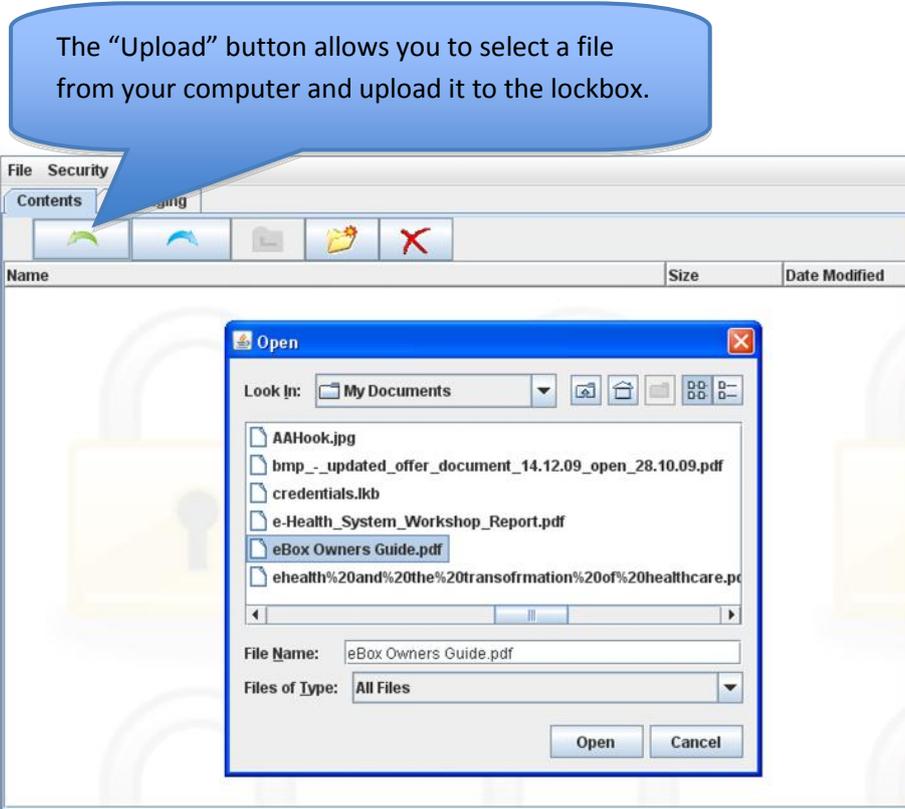
Basic navigation

Once you have launched the lockbox, you will be provided with a screen which enables you to upload and download files simply and securely. The “Content” tab at the top of the screen will be selected and your screen will be similar to the one shown below.

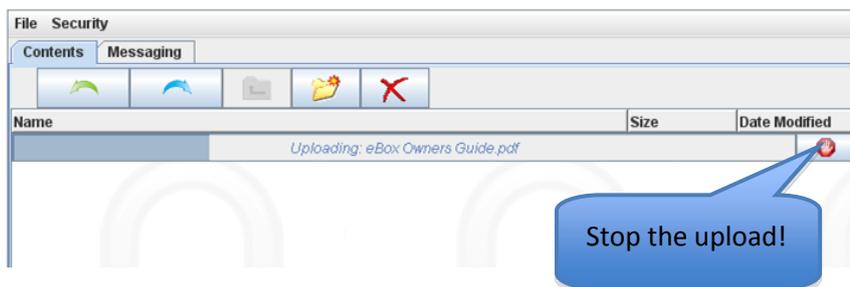


Upload and download files

To upload a file, either drag it directly from your computer and drop it in the “File” window, or use the “Upload” button shown below:

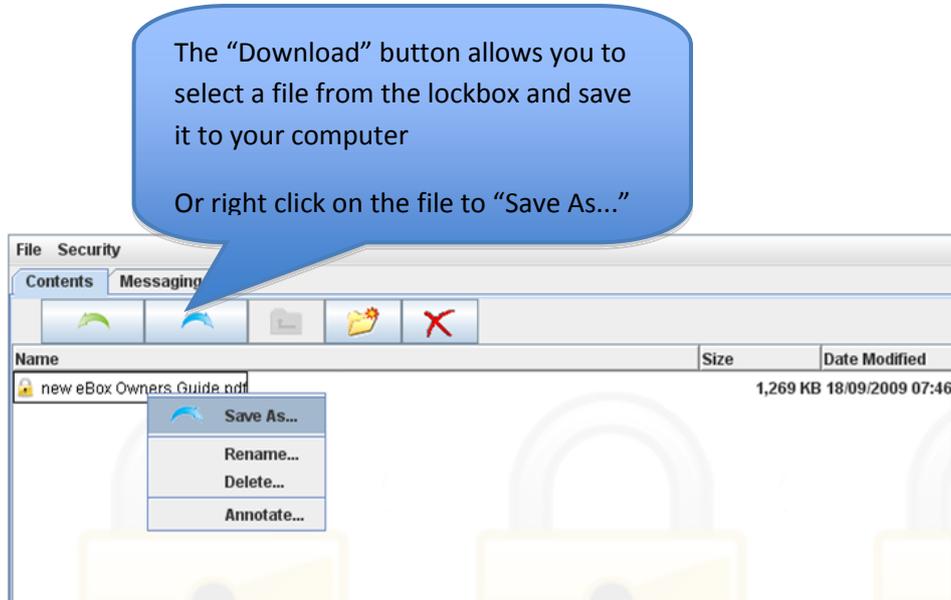


Multiple files can be uploaded simultaneously if desired, although your available Internet capacity will determine the speed of the upload. At any stage you can stop the upload as shown:

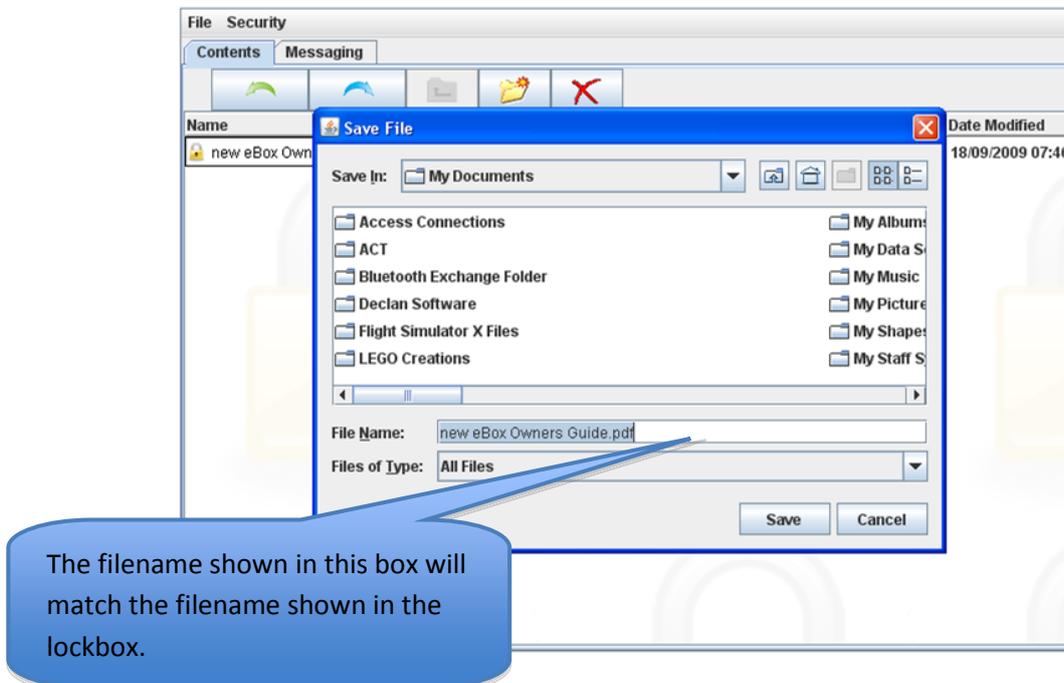


To download a file, right-click on the file and “Save As...” or select the file(s) you want to download and use the “Download” button shown below:

You can’t “double-click” on the file to open it – you need to download it to your computer first. Once the file is on your local drive, you can open it from there.

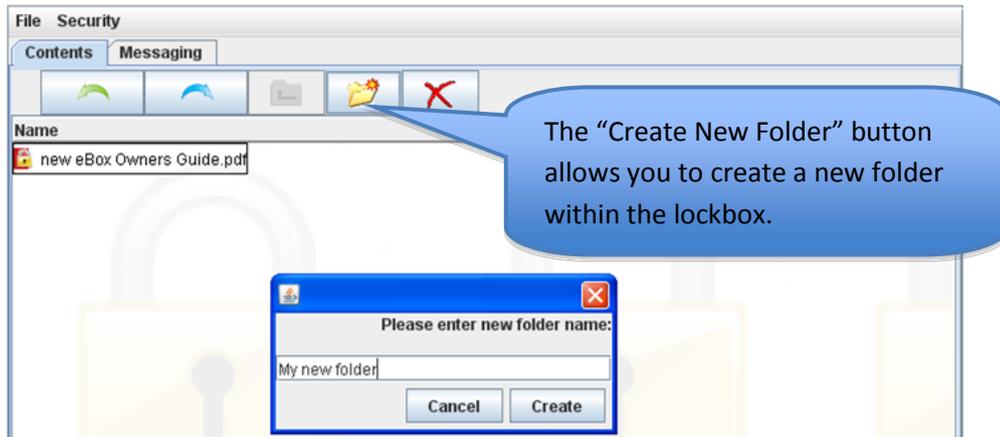


As with uploads, you can download multiple files at once if you wish (only limited by the speed of your Internet connection). You can also stop a download by selecting the “Stop” button.

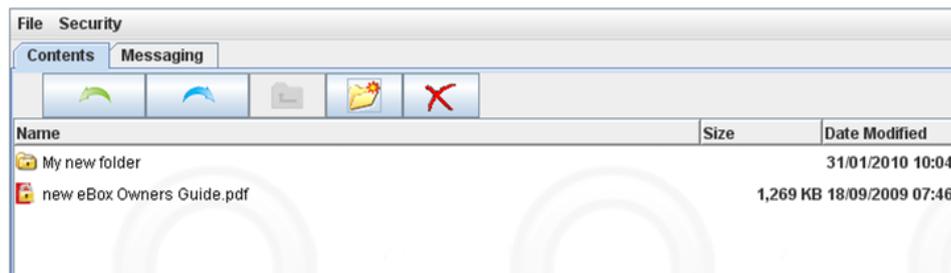


Create a new folder

You can create new folders within your lockbox, and select a name for them.



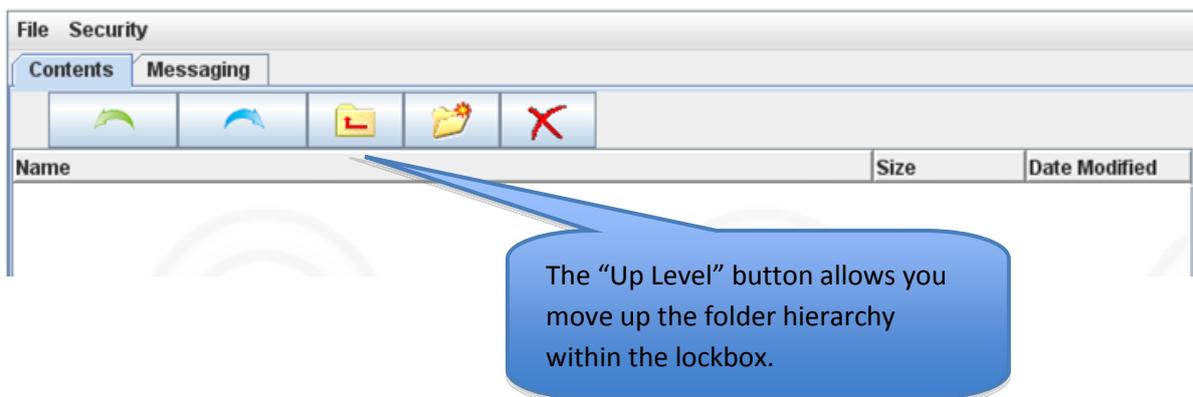
You'll now see the new folder appear within the File panel on the right.



Move up and down levels

By clicking on a folder you can move down levels in the folder hierarchy.

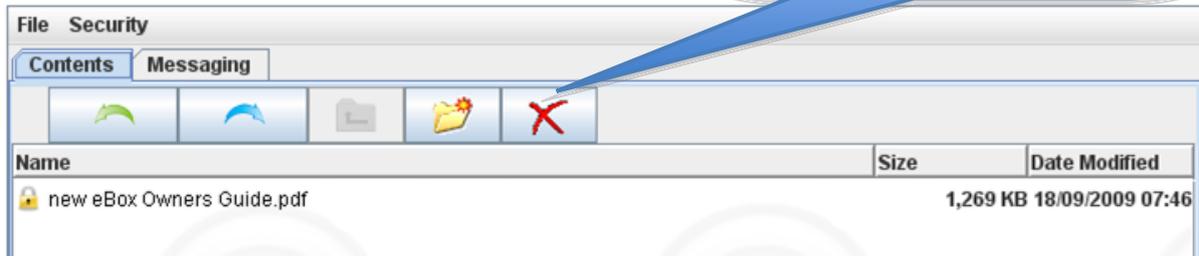
To move up again, click on the "Up Level" button



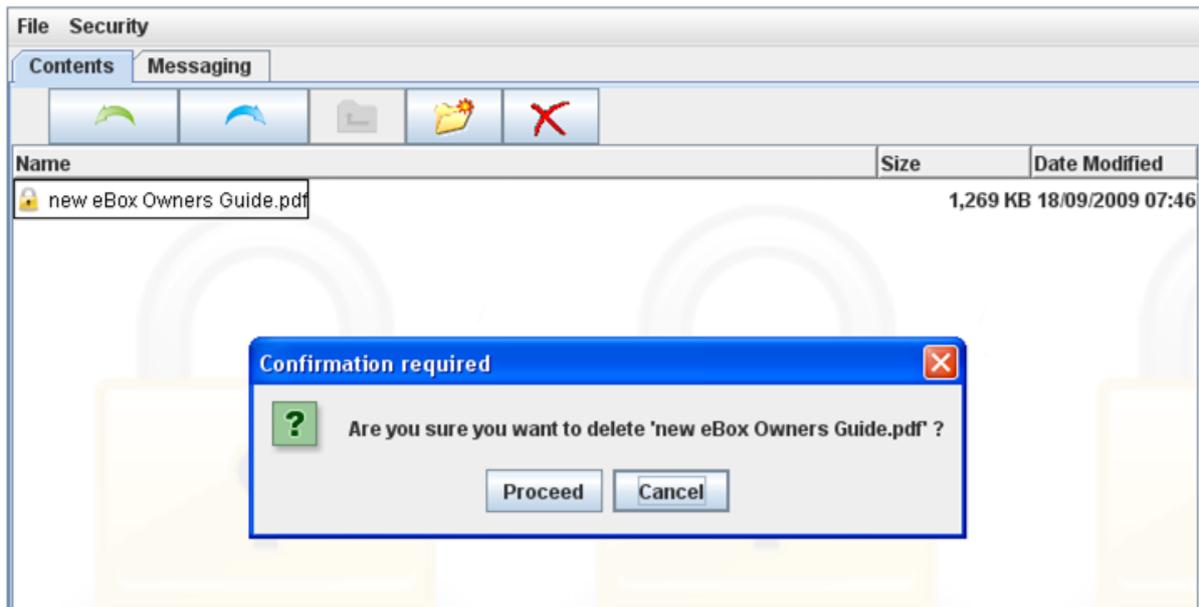
Delete

This option allows you to delete file(s) from the lockbox.

The "Delete" button allows you delete files and folders .



You will be provided with a confirmation window (as shown) prior to the delete.

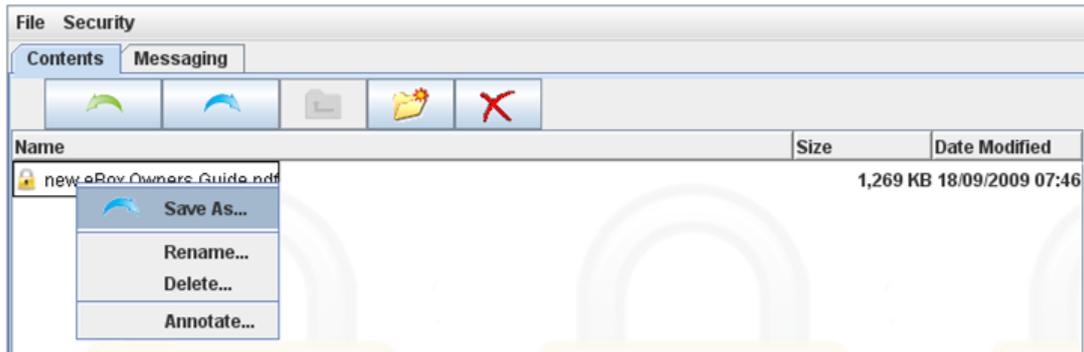


Right-click options for files

You can right-click on a file in a lockbox to be presented with four options:

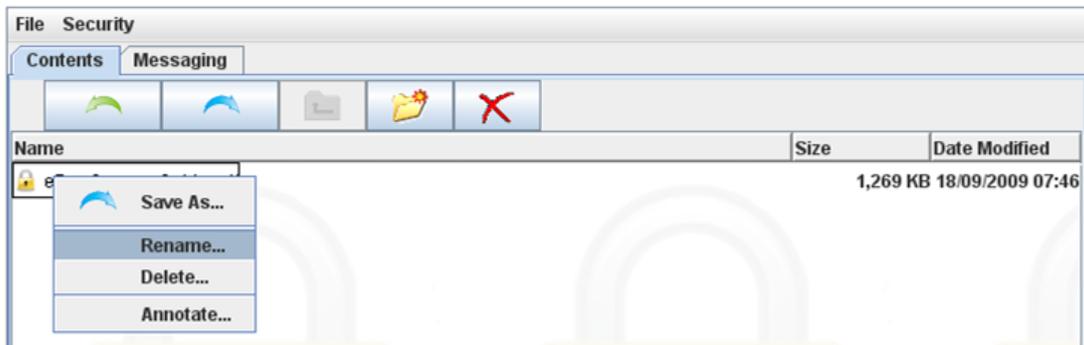
Save As (Download)

This option allows you to download a file from the lockbox in the same way as selecting the “Download” button on the menu bar.

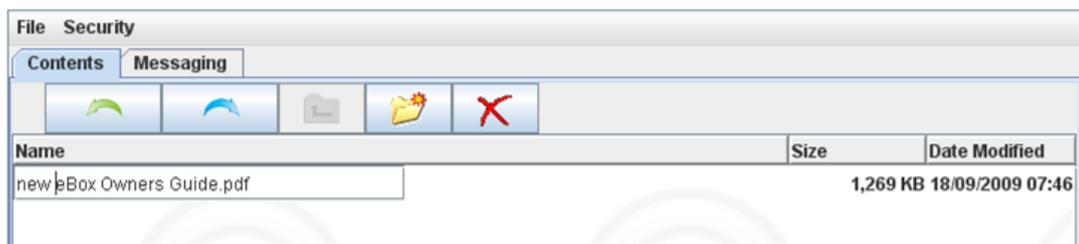


Rename

This option allows you to change the name of a file within the lockbox.



When you select “Rename”, the file name will be highlighted as shown – simply type in the new filename and press “Enter” or “Return”.

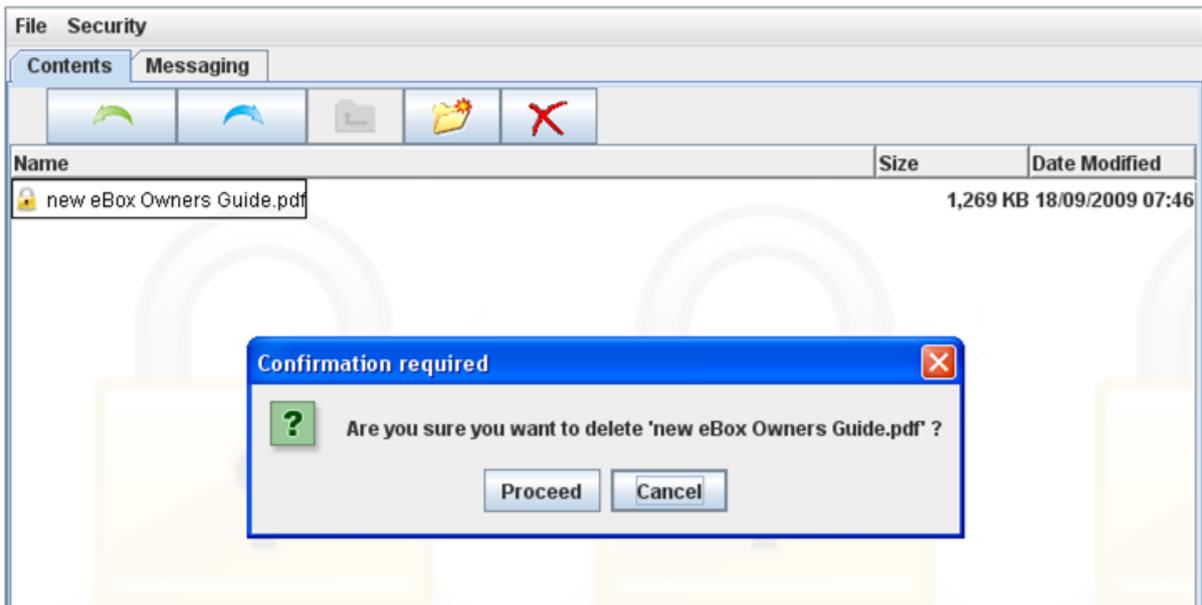


Delete

This option allows you to delete file(s) from the lockbox, in the same way as selecting the “Delete” button on the top menu bar.

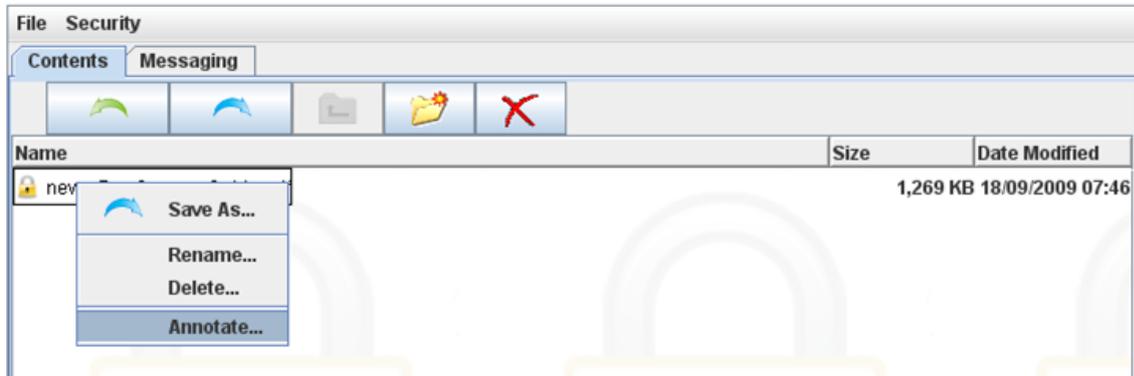


You will be provided with a confirmation window (as shown) prior to the delete.

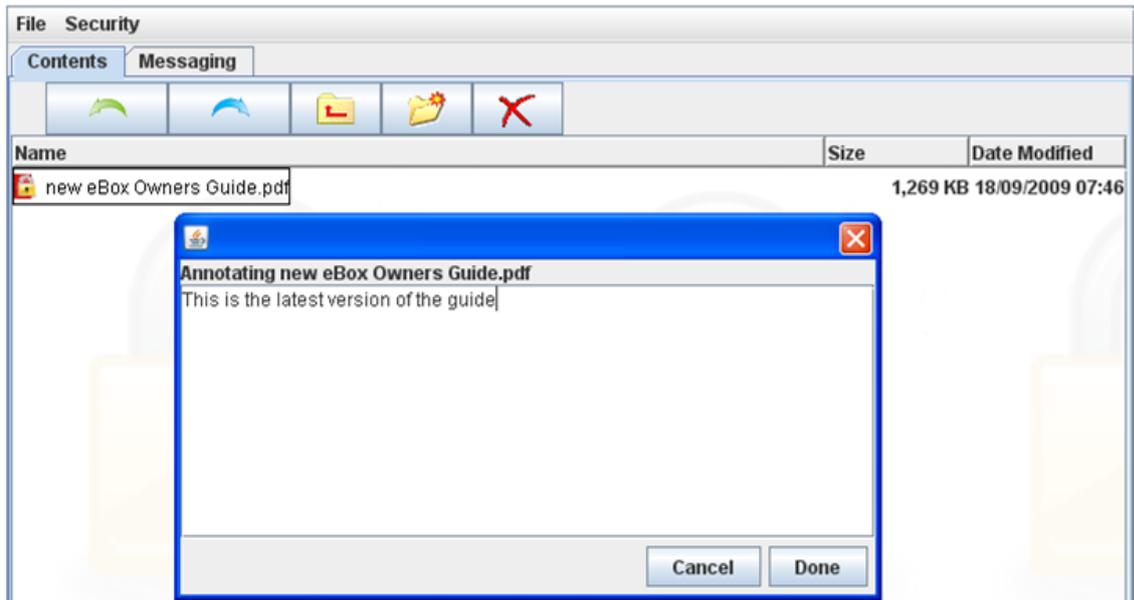


Annotate

This option allows you to add a note to the file for other users of the lockbox to read.



When you select “Annotate”, type your note in the window. Select “Done” when you are finished.



The file will now appear with a red square behind the lock icon, as a visual indication that this file is annotated. Hover your mouse over the file to read the annotation, and right-click on the file and select "Annotate" again to edit the note.



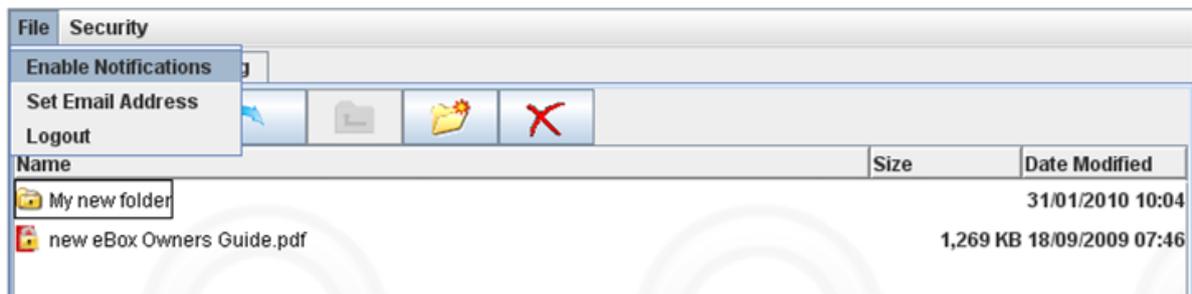
File Menu

Your lockbox contains a number of settings which you can adjust via the top menu in the lockbox window. For more information, see the appropriate section below.

Enable / Disable Notifications

When notifications are enabled you will start receiving emails whenever there is activity in this box. To change your global notification settings, toggle the setting in the “File” menu (this menu option will change based on the option you currently have selected).

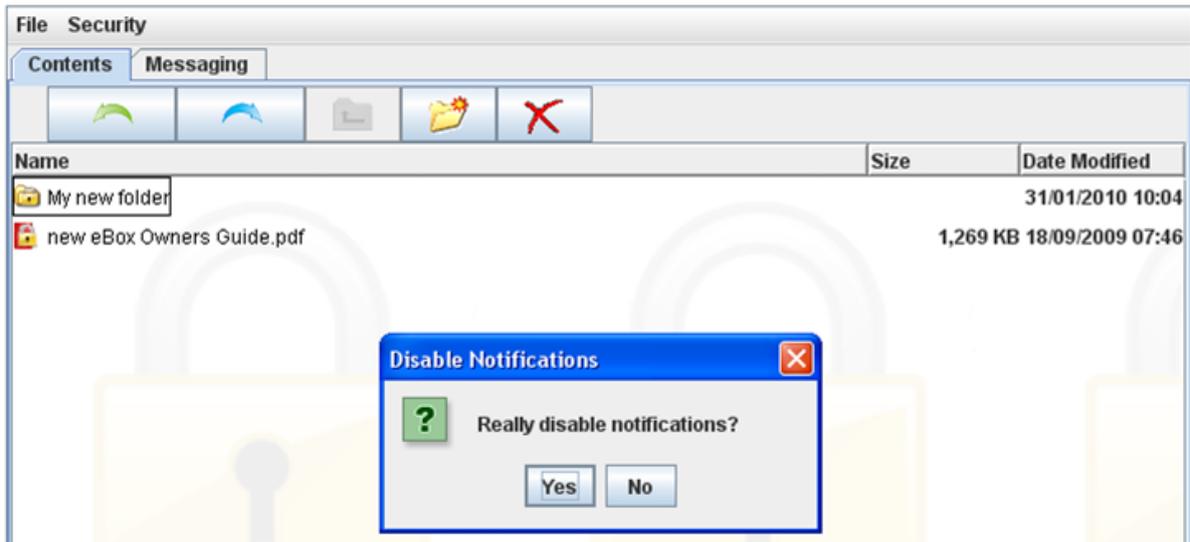
When notifications are disabled, select “Enable Notifications” to turn them on. Note: you will also need to set an e-mail as shown below.



When notifications are enabled, select “Disable Notifications” to turn them off.



Then confirm your choice.



Set Email address

Before you will be able to receive notifications you will need to set your e-mail address.

Select this option to enter and confirm your e-mail address, then click "Done"

Please enter your email address below:

address

confirm

You will then start to receive notifications like this one.



Logout

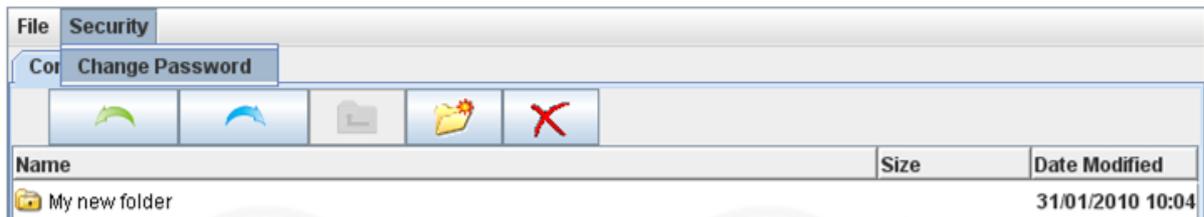
When you quit, you will be logged out and returned to the lockbox login screen. From there, you will need to re-enter your username and password to launch lockbox again.

Security menu

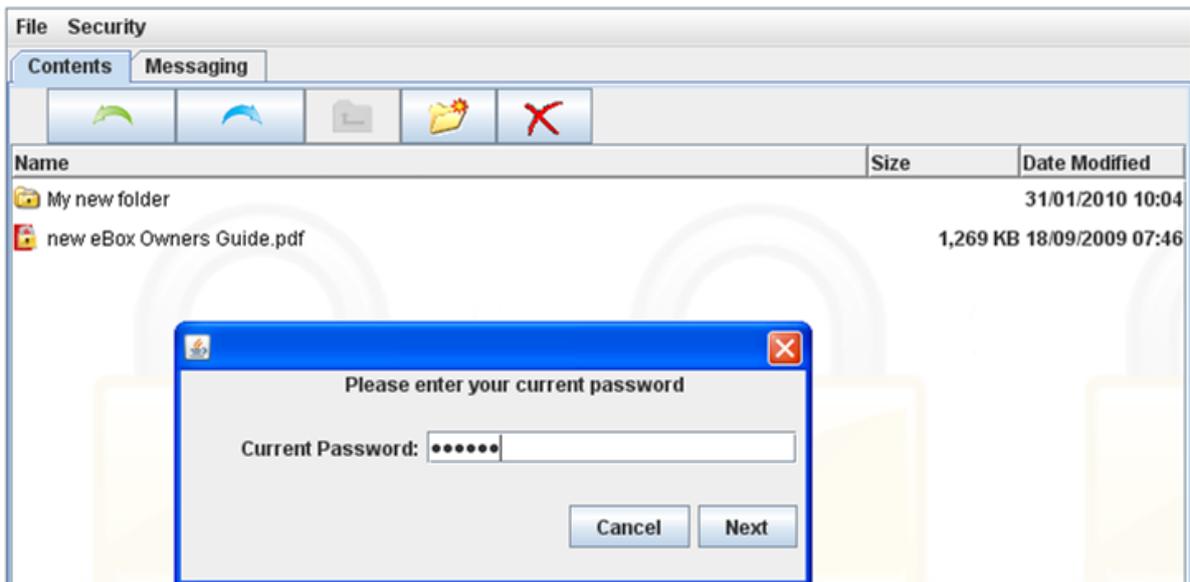
Change Password

This option allows you to change your lockbox password (your credentials password, or “Electronic Key”).

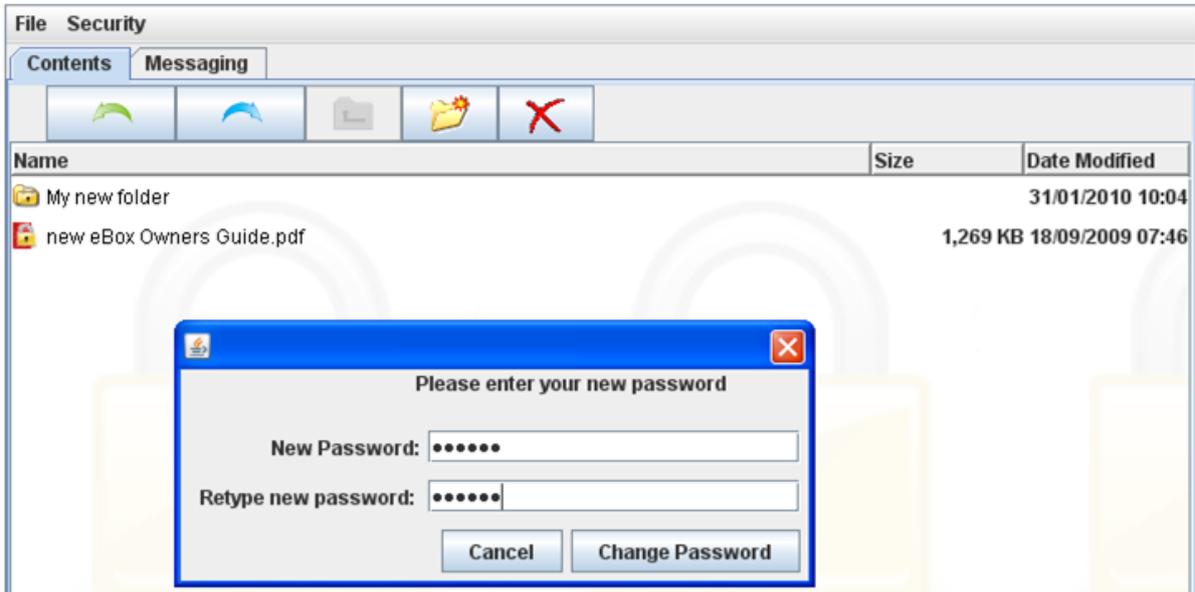
Note: if you have forgotten your password, please contact the business owner of the eBox and they will be able to reset your password for you.



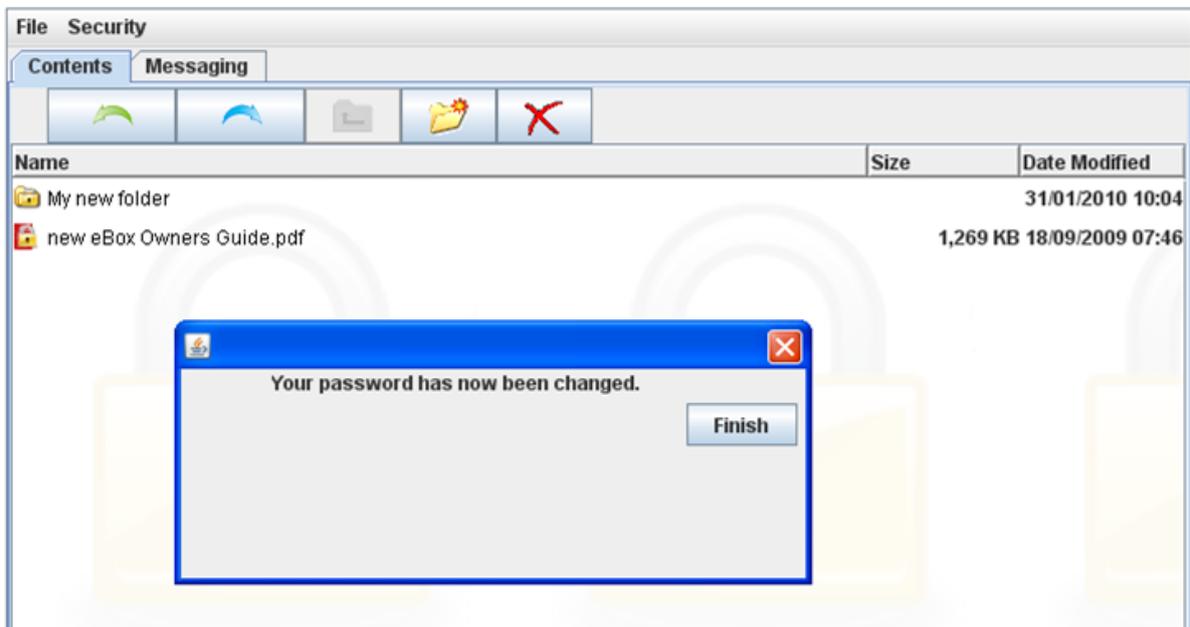
You will first need to enter your existing password.



Then enter your new password and confirmation of the new one – as shown below.

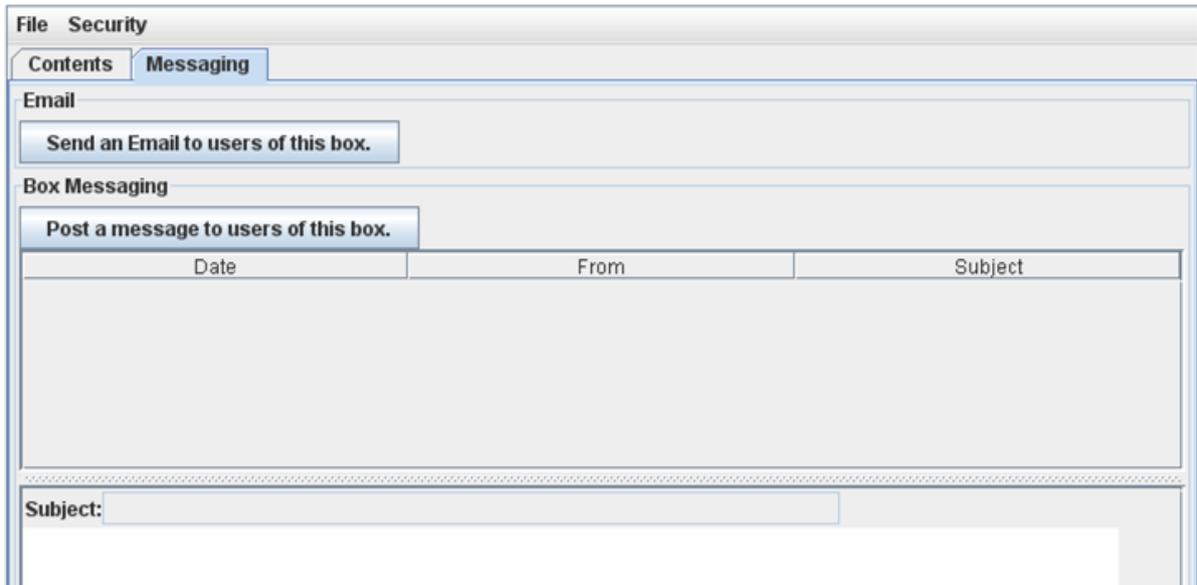


Finally, you will receive confirmation that you password has been changed. Click on “Finish” to complete the password change.



Messaging from lockbox

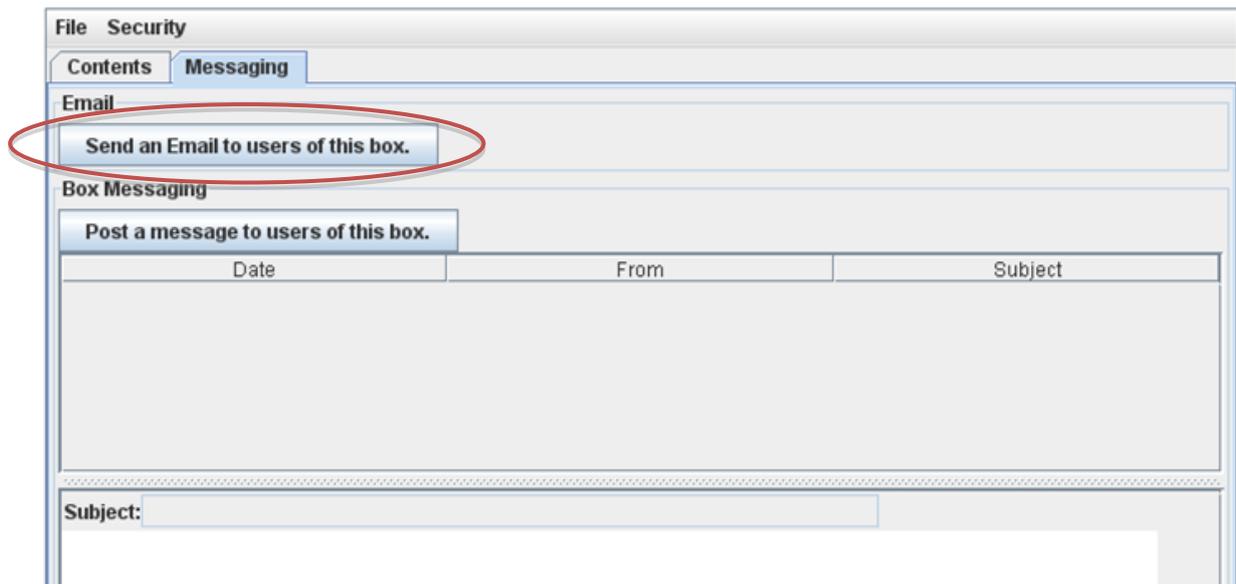
Lockbox also offers messaging functions for users; you can either post a message which stays within the lockbox, or you can email selected users' email addresses. To access these messaging options, select the "Messaging" tab at the top of the screen as shown:



Email other users of the box

SCREEN 1

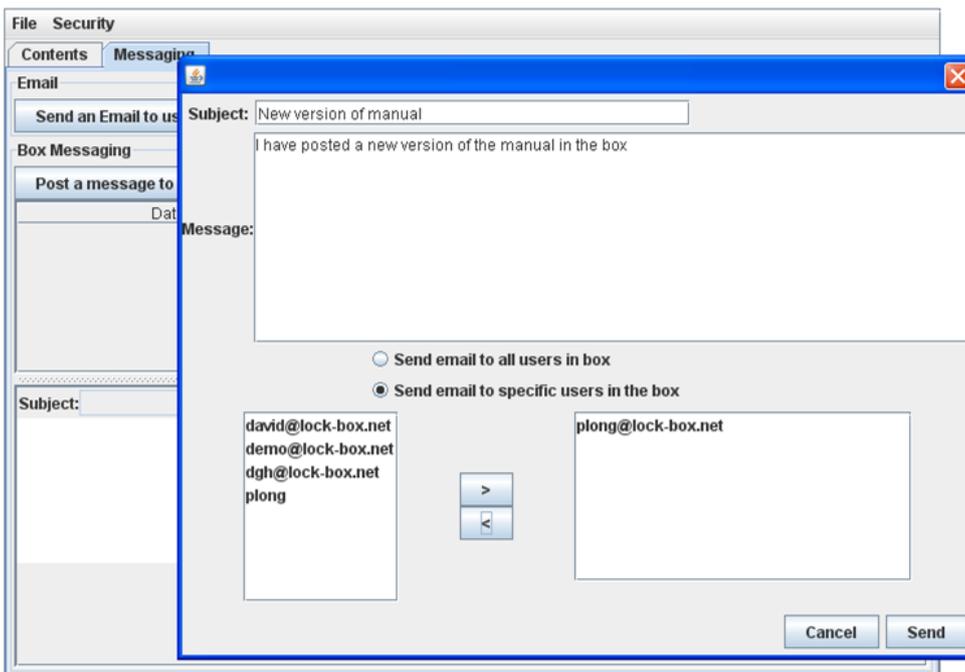
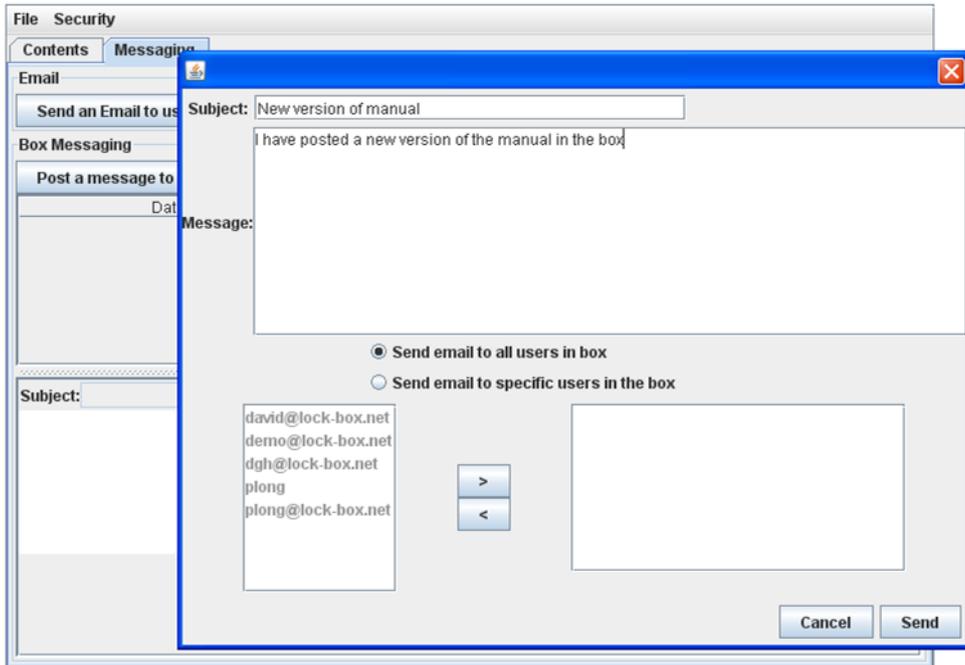
To send an email, click on the "Send an Email to users of this box" button.



SCREEN 2

A window will open for you to type your message into. Choose whether you are going to “Send email to all users in box” (shown first) or “Send email to specific users in the box” (shown second), then select “Send” to send the email.

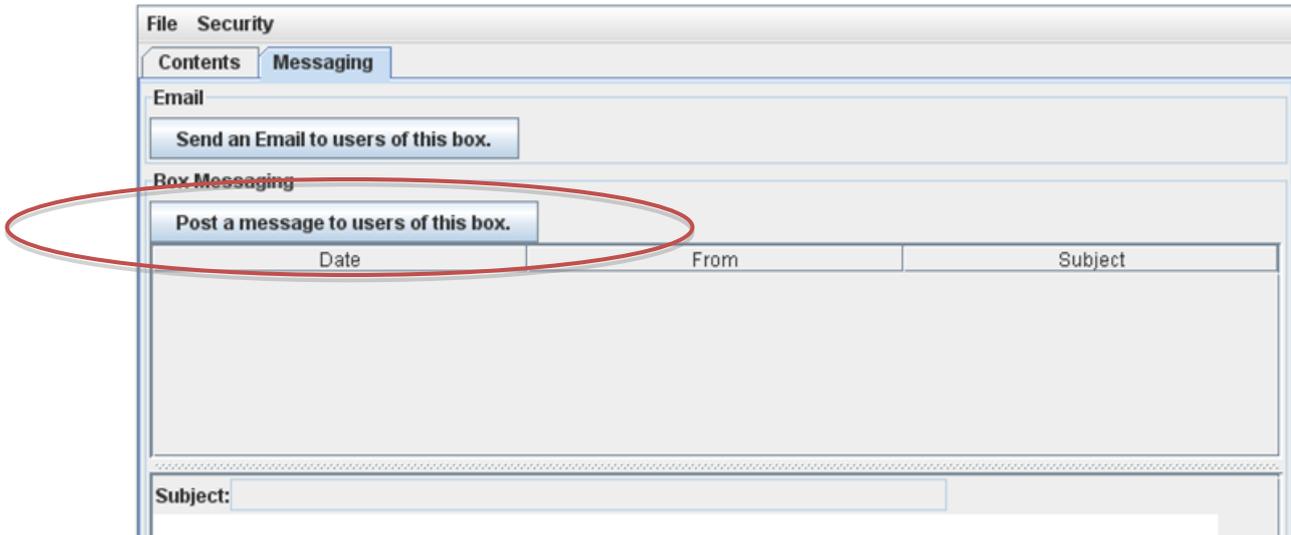
Note: to use this option, you and the users you wish to email must have provided email addresses to lockbox during registration.



Post a message to other users of the box

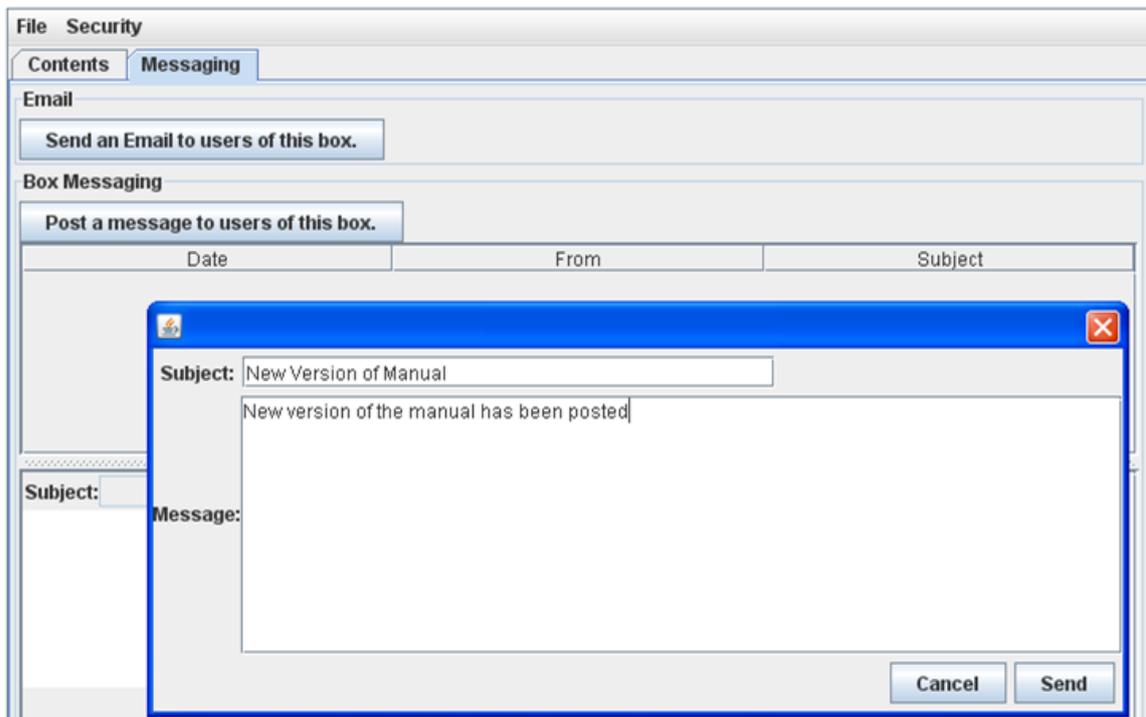
SCREEN 1

To post a message, select the “Post a message to users of this box” button.



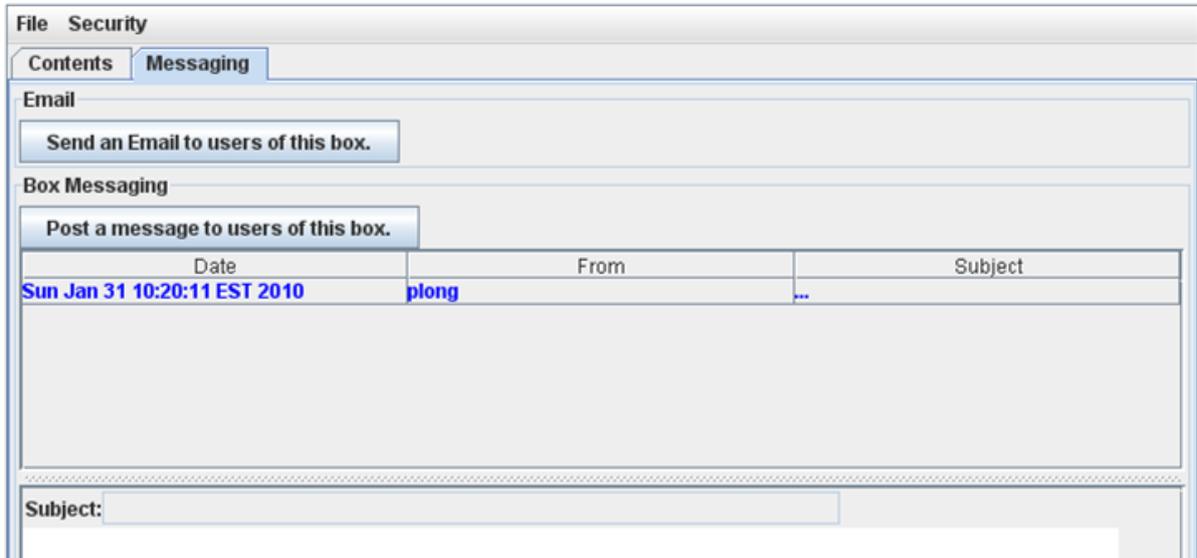
SCREEN 2

Type the message subject, and then move your cursor to the box below that to enter the text of the message. When you are done, select “Send” to post the message to the box.

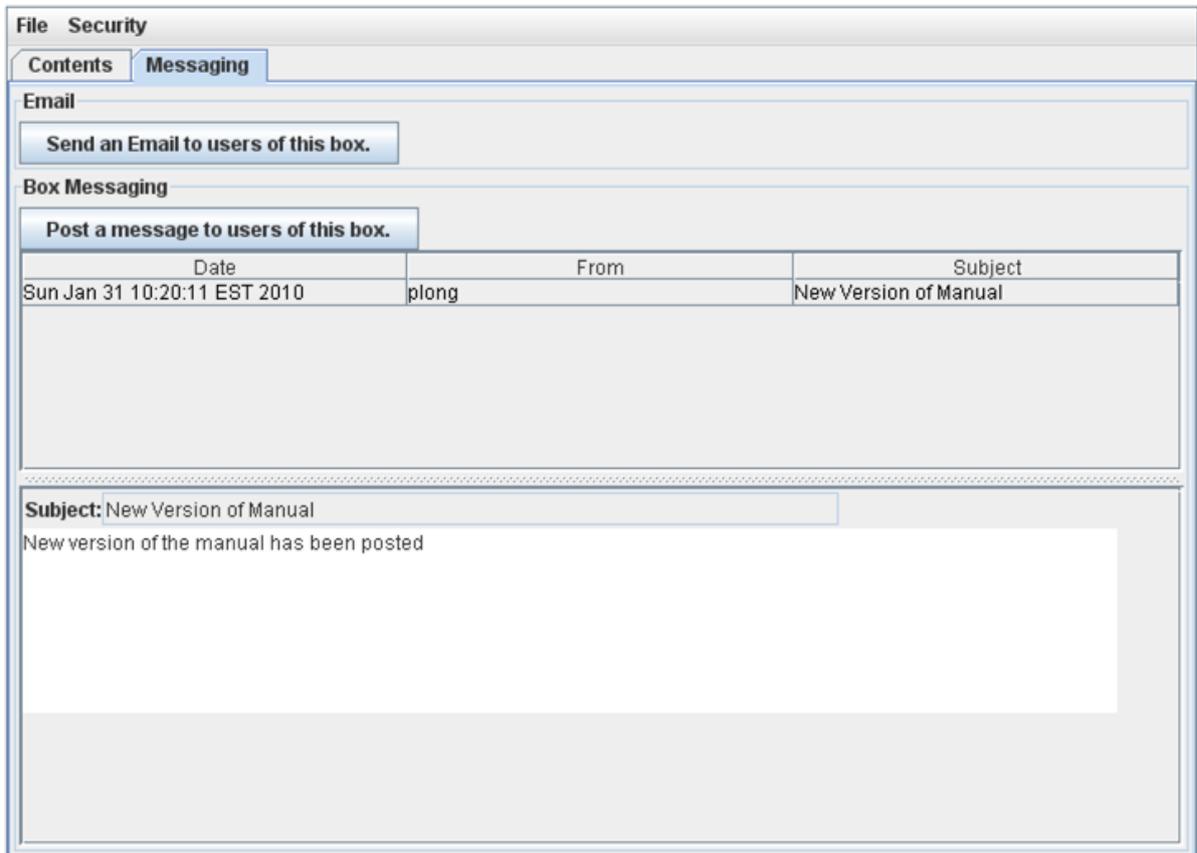


SCREEN 3

In the screenshot below you can see a message posted in the sample box.



In your box, simply click on a message of interest from the list to read it.



Troubleshooting

Problem: What do I do if lockbox is not launching?

STEP 1: Check your OS and Java versions, and clean up temporary files

If you're on a PC:

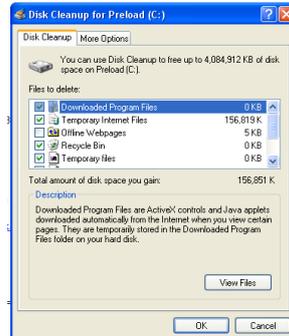
You will need to have a minimum of Java version 5 or later enabled on your PC to run lockbox. Use the following URL to check your Java version and update and/or install if you need to:

<http://www.java.com/en/download/installed.jsp>

The screenshot shows the Java website interface. At the top, there is a search bar and navigation links for 'Java in Action', 'Downloads', and 'Help Center'. The main content area features a sidebar with 'HELP RESOURCES' including 'Installing Java', 'Using Java', 'FAQ: General Questions', 'FAQ: Mobile Java', and 'Support Options'. Below this is a 'SEARCH JAVA HELP' section with a search box. The main article title is 'How do I test whether Java is working on my computer?'. The article lists applicable platforms (Solaris SPARC, Solaris x86, Red Hat Linux, SUSE Linux, Windows 98, Windows ME, Windows 2000, Windows XP, Vista, Windows 2003, Windows 2008 Server, iOS) and browsers (Internet Explorer 5.5, Internet Explorer 6.x, Internet Explorer 7.x, Netscape 4.7x, Netscape 6.2x, Netscape 7, Mozilla 1.4+, Firefox). It also lists Java versions (1.4.2_xx, 1.5.0, 6.0). A prominent message box states 'Your Java is working' and 'Java update available'. Below this, it shows the user's Java configuration: Vendor: Sun Microsystems Inc., Version: Java 6 Update 15, Operating System: Windows XP 5.1, Architecture: x86. A list of additional configurations to check is provided, including enabling Java through the web browser and the Java Plug-in Control Panel, and clearing the web browser cache. A link to download and installation instructions is also present. At the bottom, there is a footer with links for 'Select Language', 'Java Wear', 'Newsletter', 'About Java Technology', 'Partner with Us', 'Developers', 'Privacy', 'Terms of Use', 'Trademarks', 'License', 'Disclaimer', and 'Support', along with the Sun logo.

Next, clean up your temporary Internet files from your computer.

Under Windows XP, delete Temporary Internet Files by selecting “Programs / Accessories / System Tools” from the Start Menu and then select “Disk Cleanup”.



If you're on a Mac:

You will need to have a minimum of OS version 10.5 or later and a recent version of Java on your Mac to run lockbox.

Firstly check your operating system version is >10.5. Select the Apple icon on the top left of your screen, then select “About This Mac”. You will see a window similar to the one below, which contains your operating system (OS) version number.



Assuming your OS version is >10.5, you can run “Software Update” either from the “About This Mac” window or directly from the Apple icon in the top left of your screen. This will ensure you have a recent version of Java installed.

Note: if you are running MAC OS <10.5 you will not be able to run lockbox without an OS upgrade. Please consult your supplier or IT administrator.

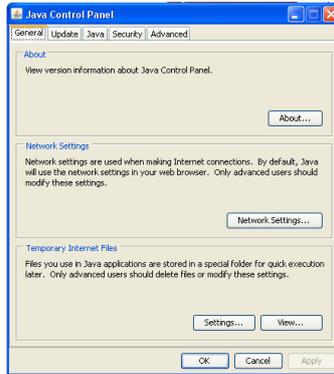
STEP 2: Further troubleshooting

If neither of the steps above resolves your issue, please contact us for further assistance. Since lockbox runs using Java, we'll need a copy of the Java console to understand what's happening and fix any problems. To enable the Java console, follow the steps below.

If you're on a PC:

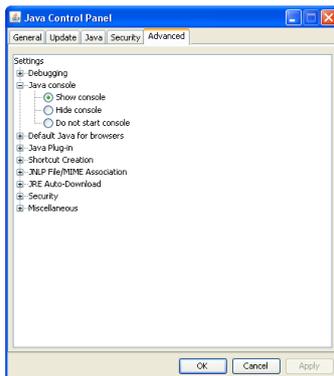
STEP 1

To enable the Java console, select “Settings / Control Panel” from the Start Menu and then select “Java”.



STEP 2

Click on the “Advanced” tab and then the “+” next to “Console”. Ensure the “Show console” option is selected. The Java console will now appear whenever you use Java in your web browser.



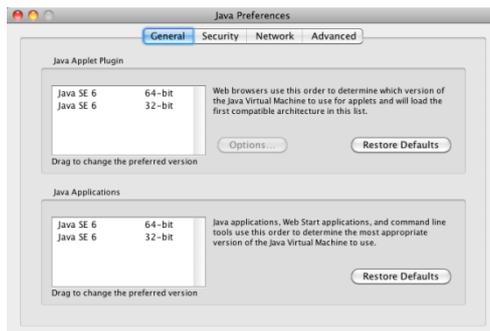
STEP 3

You'll then need to restart the lockbox application to see the console output. Please provide us with a screenshot or copy of this output to help diagnose and resolve the issues you're having.

If you're on a Mac:

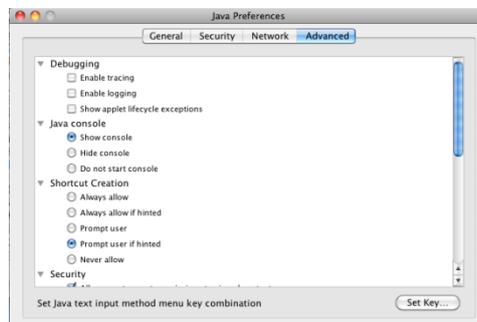
STEP 1

To enable the Java console, go to “Applications / Utilities” and open “Java Preferences”.



STEP 2

Select the “Advanced” tab, then the arrow next to “Java console”. Ensure the “Show console” option is selected; the Java console will now appear whenever you use Java in your web browser.



STEP 3

You’ll then need to restart the lockbox application to see the console output. Please provide us with a screenshot or copy of this output to help diagnose and resolve the issues you’re having.

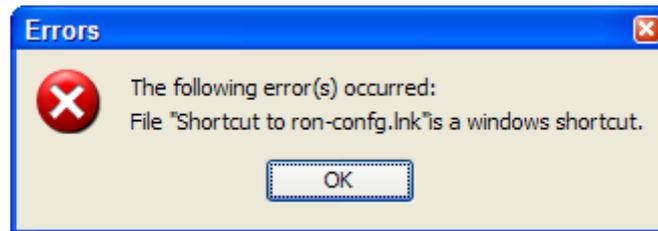
Problem: I can't log in - Can you help?

Forgotten password

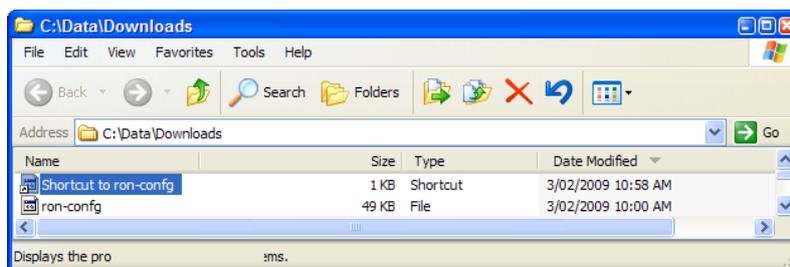
If you've forgotten your website password, simply call the business whose eBox you are trying to log into and they will be able to reset your password for you.

Problem: “File “xx” is a windows shortcut.”

Windows has a capability called “shortcuts”. Shortcuts are like street signs that tell you where to find the museum and the zoo: they tell the operating system where to find the actual file. You’ve probably got quite a few shortcuts on your desktop to various files and applications. Unfortunately, you can’t upload a shortcut to lockbox. We can’t use the shortcut to find the real file, so we let you know that the file is a shortcut and we can’t upload it. This message will appear if you try to upload a shortcut.



The quick solution to this problem is to right-click on the shortcut, and select “Properties”.



This brings up the Properties dialog box. Click on “Find Target” – this will bring up a window with the real file and you can then drag this into your lockbox

