



CBIZ Secure-FTP

Quick FTP Version
Client/3rdParty User Guide





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Opening Secure-FTP: <https://Secure-FTP.cbiz.com>

Opening Secure-FTP:

Open Internet Explorer. Navigate to <https://Secure-FTP.cbiz.com> by typing the URL into the Address bar. You will be brought to the following screen. Enter your username and password and click "Sign On".

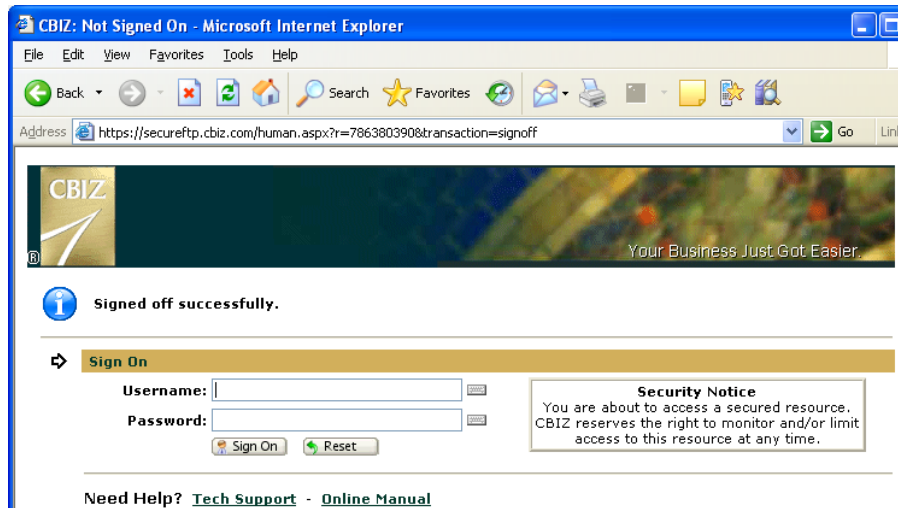


Figure 1

Logging in for the first time: Password Change

Enter the user name and password that was provided. The Secure-FTP will prompt a password change. **The new password should be at least 6 characters and contain 1 capital letter and 1 number**

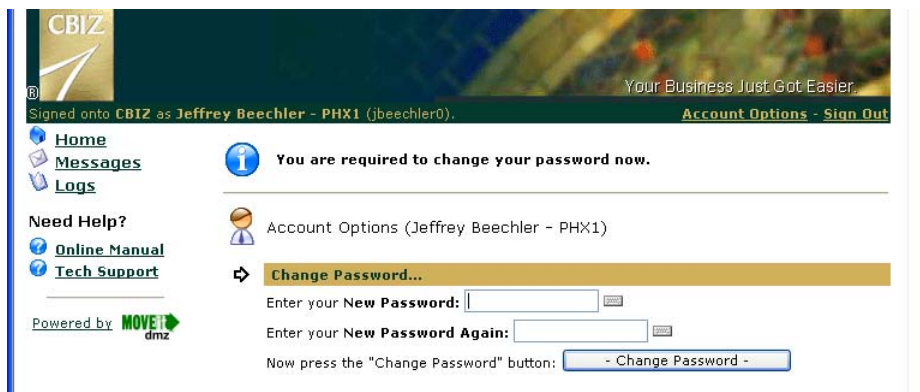


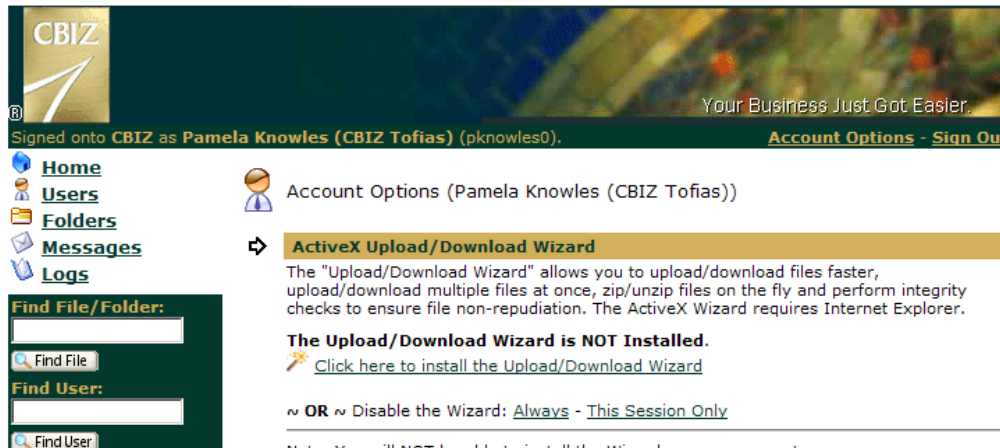
Figure 2



Initial Installation of the Upload/Download Wizard (if prompted)

You may be prompted to Click on the link “Click here to install the Upload/Download Wizard” or “Try to install the ActiveX Wizard”, depending on which message is shown.

Note: If the Upload/Download Wizard gives any error messages when being installed there is either an issue with permissions on your Secure-FTP account or on your computer. Please contact FTP Support (ftpsupport@cbiz.com) for assistance.



The Upload/Download Wizard is NOT Installed.

[Click here to install the Upload/Download Wizard](#)

Figure 3

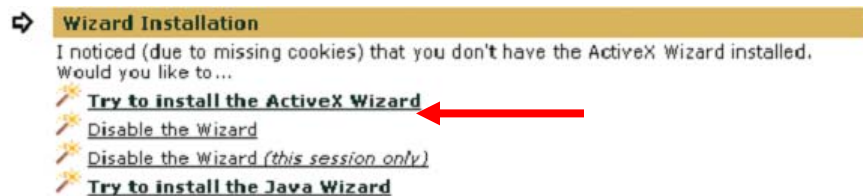
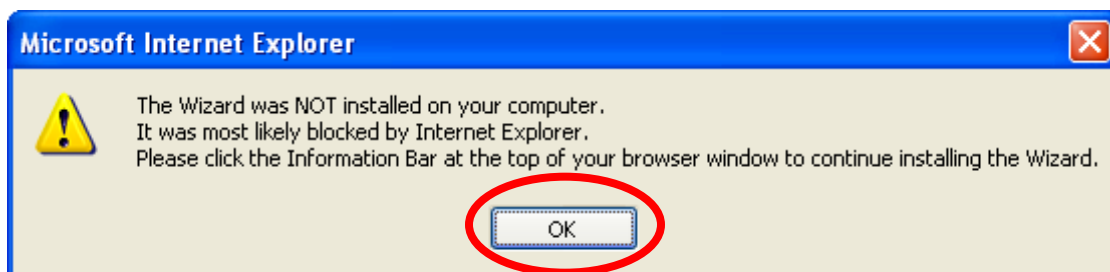


Figure 4

An error message like the one shown in Figure 5 may appear. If it does, **click OK**.



There will be a message at the top of the Internet Explorer browser. **Click the message that appears and click “Install ActiveX Control”**. An example is shown in Figure 6.

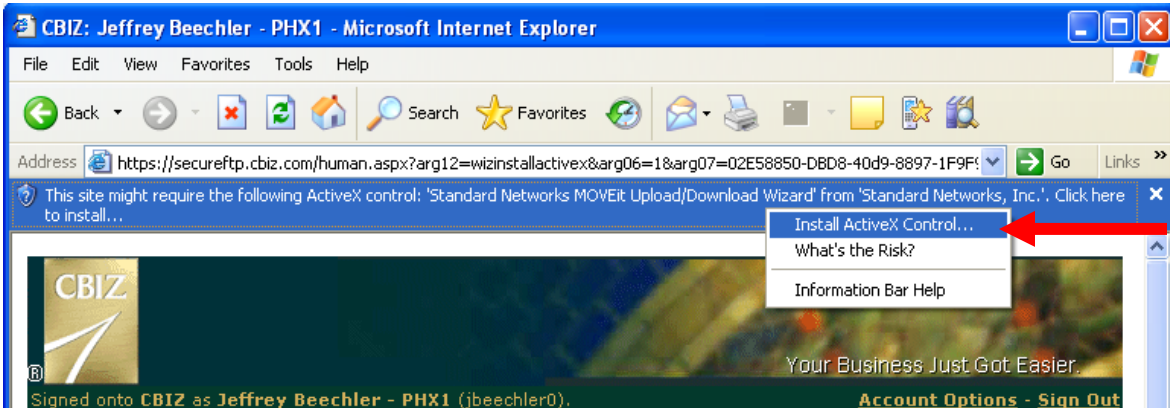


Figure 6

The window will change and look like Figure 7. After a few seconds, a message (Figure 8) will appear.

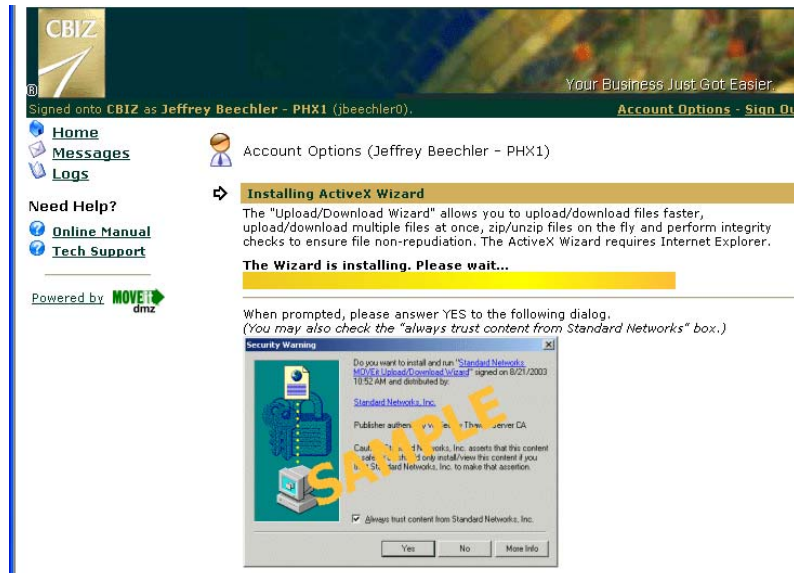


Figure 7

pknow



Click **“Install”**. After the install is completed, another message will appear (Figure 9). Click **“OK”**.

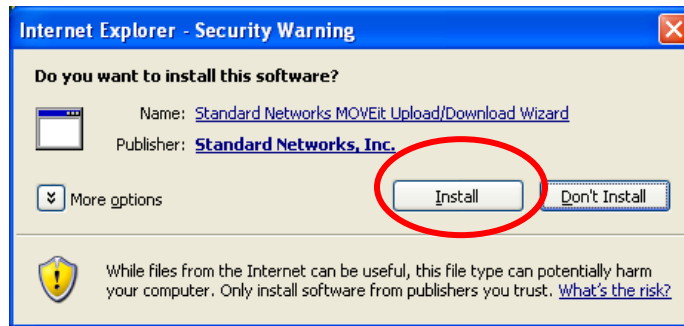


Figure 8

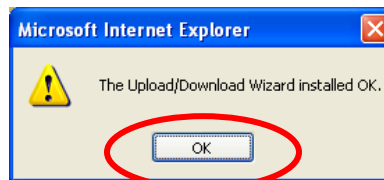


Figure 9

Secure-FTP will go back to the user account window (Figure 10). Secure-FTP is ready to upload or download content.

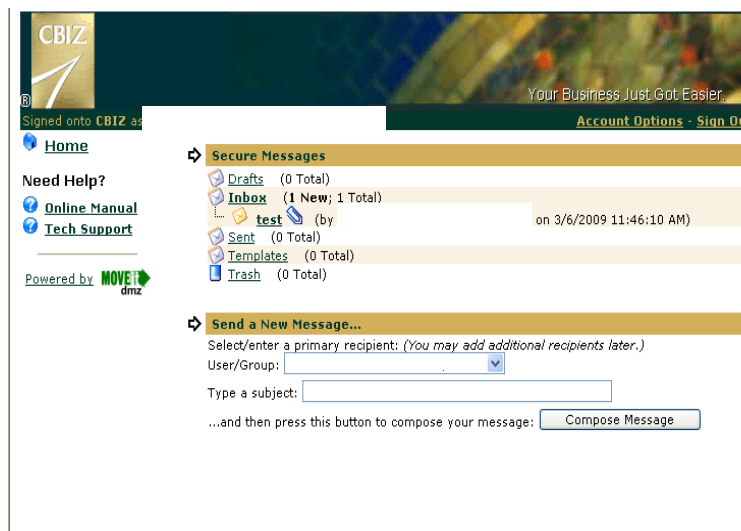


Figure 10





Reading Secure Messages

Reading a secure message involves clicking on the linked subject of a secure message. Links to secure messages can be located in several different places:

1. New secure messages will usually be displayed on your Home page. Simply click on the subject of any message to view the whole message.

New Messages

- [I need my password changed....](#) (from [Freddy Masterson](#) at 11/3/2005 3:56:10 PM)
- [Latest figures for Q3](#) (from [John Smith](#) at 11/3/2005 3:54:51 PM)

[Mark All Messages Not New](#)

2. Newly received messages will always be in your Inbox. Other messages may have been moved to other mailboxes. To list your mailboxes, click on the Messages link on the left-hand navigation section, then click on the Go To Mailboxes link. Your mailbox list will be shown, indicating the number of new messages and total messages in each. Click on a mailbox to view its contents, and click on a message subject to read and individual message.

Mailboxes / Inbox

Secure Messages

Subject (click to read message)		From	Date/Time	Actions
Password change...		John Smith	3/7/2006 1:58:43 PM	Trash
Latest Figures for Q3		Freddy Masterson	12/12/2005 6:13:31 PM	Trash

[Mark All Messages Not New](#)

[Return to Mailboxes](#) - [Advanced View](#)

If you received a **new message notification**, click (or copy into your browser) the link provided in the email. The link will take you directly to the message referenced (after signing on, if necessary).





Composing Secure Messages

Composing a new secure message can be started from your home page, using the Send A New Message section. Simply select the name of the user or group you wish to send a secure message to, enter a subject, and then click the Compose Message button. If you don't have a selection box, enter the name or email address of your intended recipient, and the system will search for the correct user for you.

Send a New Message...
Select/enter a primary recipient: *(You may add additional recipients later.)*
User/Group:
Type a subject:
...and then press this button to compose your message:

After clicking the Compose Message button, you will be taken to the Compose Message page, where you can begin to write your new secure message. To add more recipients, either select the user or group from the selection box, or enter their name or email address, then click the Add button. To make sure you get notified when your recipient(s) read your message, check the Delivery Receipt(s) checkbox.

If you are using Internet Explorer, Firefox or Mozilla, you will see an advanced WYSIWYG secure message editor where you can type your message. Buttons above the editing box let you change the font, size, style, alignment, indentation, and even color of the text you enter. You can also enter links and lists. If you are not using Internet Explorer or Mozilla, you will see a standard text box.



Upload Wizard

Upload Wizard: Add File

After clicking the “CLICK HERE to Launch the Upload Wizard...” link a window will open looking like the example below (figure 20). To upload one or more files, click “Add File”. Navigate to the file you want to add to the Secure-FTP folder (figure 21). Files to be uploaded can reside either on a local PC or a network shared resource (i.e. X: drive).

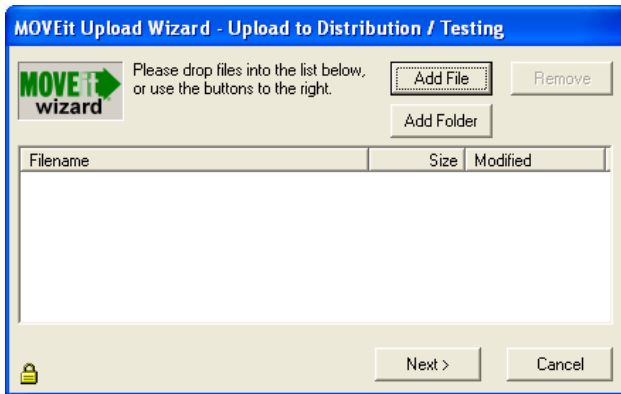


Figure 20

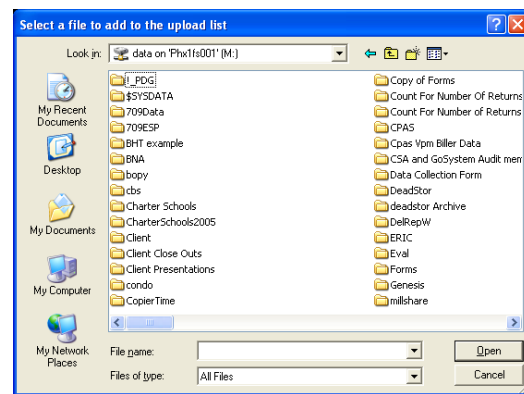


Figure 21

There are three ways to select one or more files to be uploaded.

Method 1: Click and drag (while holding the mouse button) to select multiple files.

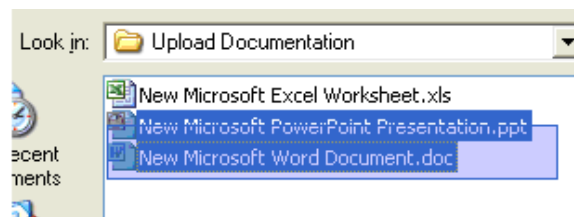


Figure 22

Method 2: Click one file in a list → press and hold the Shift key → Click the last file in the list. The files have to be contiguous within the list.

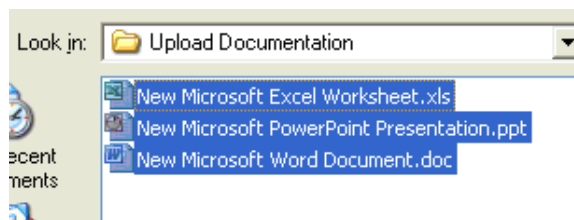


Figure 23





Either an error message will appear, the folder window will come back with a file listing (upload files individually) or the folder window will come back with an Upload Wizard Transfer Report (Upload all files as one .zip).


Upload Wizard Transfer Report	
Local Processing	Status
 3 file(s) zipped into 'Testing.zip'	Uploaded to Distribution / Testing OK (ID #396205368)

Figure 28

The intended recipient of the files is now able to download the content that has been uploaded to the Secure-FTP system.

Customer Support

The home page of the CBIZ Secure FTP web-site provides contact information for any technical or user account support needs. An email address ftpsupport@cbiz.com is setup for customer's to submit their questions and receive an email or phone call back with a response.

