### Summary

This article explains how to set up an account for the CPUC Secure File Transfer Protocol (SFTP) that will enable you to send large files securely throughout the CPUC. The article will also detail steps to exchange large files with an external entity. You can send files up to 2GB in size.

### **Getting Started: Setting up Account**

- 1. Go to: https://cpucftp.cpuc.ca.gov
  - There are three ways to gain access to the CPUC Secure File Transfer Protocol:
    - a. All CPUC employees: enter your "First.Last name email (Russell.lee@Cpuc.ca.gov) and password (same as logging in your computer)
    - b. If you are a non CPUC employee, register as a new user (See Figure 1)
    - c. Your account was created by Help Desk and you received an invite via Email (See Figure 7)
- 2. When you are on the login page, click on "I don't have an account yet." (See Figure 1)

### Accessing CPUC Secure File Transfer as a new user (Non-CPUC employee)

#### Figure 1

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Your Most Valuable Asset.	
Share it. Store it. Secure it.	
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	<b>7</b> , Secured by Accellion.

1. To complete the registration process, enter your email address. (See Figure 2) **Figure 2** 

 CPUC Secure File Transfer Protocol

 Image: Construction of the secure f

Information Your Most Valuable Asset. Share it. Store it. Secure it.

2. A verification code will be sent via email. (See Figure 3)

# Figure 3

Secure File Transfer Registration Email Verification

Thank you for sharing files securely.

We pred to verify your e-mail address so that we can use at a valid Secure File Transfer account for you.

Please enter the following code to verify your e-mail address Verification Code: EinBgDL2

If you have elecady closed the previous registration window, please click on this link. https://cpucitp2.cpuc.ca.gov/a/wa/08888DxSW/XaY6U21001308601059

This verification code expires within 48 hour(s). Beyond this timeframe, please click here to request a new verification code.

Thank you for using Secure File Transfer.

Secured by Accellion™

3. To verify your account, enter the verification code. Click "Verify." (See Figure 4)



4. The setup process will ask you to create a password and to re-type it. Click "Register" upon completion. (See Figure 5)

#### Figure 5

CPUC Secure File Transfer Protocol	Create your passwor	rd:
	E-mail:	gorgano227@hotmail.com
JULITIES COM	Verification Code:	Verified
No UTILIAN COMMENTS	Create a Password:	
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OF CALIFORNIT		Register

Information Your Most Valuable Asset. Share it. Store it. Secure it.

5. Upon successful registration, this message should appear, and immediately forward you to the home page of the application (See Figure 6)

#### Create your account

Your Secure File Transfer account has been activated and you will be automatically redirected to the start page of the service.

Note: If you are not redirected shortly, please click on Login.



### Access CPUC Secure File Transfer via Email invitation

1. If you were invited to use the program, an email was sent to you from the inviter. Click on the link that is provided. (See Figure 7)

#### Figure 7

You're invited to use CPUC Secure File Transfer
To accept this invitation and register for your CPUC Secure File Transfer account please click on this link:
https://cpucftp2.cpuc.ca.gov/a/wva/08888Mbcp06wRGC1201309888383
The invitation link is only valid for 48 hours. Beyond this timeframe, please ask russell lee@cpuc.ca.gov to send a new invitation e-mail.
Thank you for sharing files securely.
Secured by Accellion

2. After you click the link, create your password. Click "Register" and following successful registration; it will direct you to the main page. Note: it has to contain at least 6 characters with one uppercase and one number. (See Figure 8)

CPUC Secure File Transfer Protocol	Please complete the registration for CPUC Secure File Transfer.			
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A THE OF CALIFORNIA	Re-type Password:			
		Register		
Information				
Your Most Valuable Asset.				
Share it. Store it. Secure it.				

### **Sending Files**

Follow steps below to send files. This applies to both internal and external users:

- Enter recipient's email address
- Enter Subject

1. To attach files to the email message, click on "Choose File/Folder." If you have files already uploaded into the File Manager, then click on "Choose from File Manager." (See Figure 9)

File Manager Send File	gure 9 ccellion 🗂		russell.lee@cpuc.ca.gov	l <u>Settings</u> I <u>Help</u> I <u>Sign ou</u>
To:		Send File		
Subject         Files:         Choose File/Folder:         Grange Applet temp directory         Choose from File Manager         Use Rich Text Formatting »             * Additional Options             If Send copy to myself	Send Save No	w Discard		Invite User
Subject         Files:         Choose File/Folder:         Grange Applet temp directory         Choose from File Manager         Use Rich Text Formatting »             * Additional Options             If Send copy to myself	To:			
Choose File/Folder or Use Regular Upload Choose from File Manager Use Rich Text Formatting *	Subject:		V9.5X88.57	
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🐲 Canad and Canadian and the definition of	III Send copy to	myself		
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2. Select the folder/file you want to attach and click "Attach." (See Figure 10)

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	🗋 cabs					
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	CLIENTU	IS				
	CLIENTV	WS.				
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4. The attachments will upload and appear on top of your message. Click "Send." (See Figure 11)

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Subject		
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	Choose from File Manager	
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- 5. Following a successful sent email, a notification page will appear (See Figure 12)
  - Note: Folders are converted into zip files.

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File Manager	Send File
Send File	
<ul> <li>CLIENTUS.zip (6.</li> <li>HUMCLogs.zip (3.</li> </ul>	
OK	

## Confirming files that were sent or uploaded to the File Manager

1. Click on "File Manager" on top of the page, and it shows all the files you have sent or uploaded in the File Manager (See Figure 13)

• The file manager is for you to store files, so you can easily select them to send later. You can add files to the cabinet by clicking "Add Files."

Figure 13 Accellion <i>1</i>				russell.lee@cpuc.ca.gov	I <u>Setting</u>	s I <u>Help</u> I <u>Sign out</u>
File Manager Send File						
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Workspaces	HUMCLogs.zip     CLIENTUS.zip	X X	20 Jun 2011 13:27:42 20 Jun 2011 13:27:28	27 Jun 2011 27 Jun 2011		3
	hao	View	per page: 20 💓 Sh	swing 1-2 of 2 🔊 🔊		

# **Receiving files**

1. You will be notified via email when you have received a file. Click on the "Download File" link (indicated by the red arrow in Figure 14)

# Figure 14

You have received 1 file. Use the secure links below to download
Download Files
Available until: 12 July 2011
Download File: 00. AL_3822-E_Vasco_Winds_Conf.doc 512.253.16 KB
You have received attachment link(s) within this email sent via Accellion Secure File Transfer. To retrieve the attachment(s), please click on the link(s). To learn how your company can benef from Accellion Secure File Transfer, please visit http://www.accellion.com

2. You will be directed to a download page. If your browser blocks downloads, click on the blue highlighted bar, and click "Download File.." Otherwise your download will automatically begin. (See Figure 15)

o help protect yo	our security, Internet Explorer bl	nr <u>hed this eite foara downloadi</u> ng filee l	to your computer. (	Click here for options
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	File Name		Size (KB)	paul mak@opus.ca.gov
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# Creating and Managing Workspaces

1. To create a workspace, click on "New Workspace" (See Figure 16)

Accellion "			russell.lee@cpuc.ca.gov	<u>Settings</u>   <u>Help</u>   <u>Sign out</u>
File Manager	Send File			
* Transfers		Workspaces		
😭 Inbox				New Workspace
Files		Workspaces		
★ Workspaces View by: <u>Al</u>   Managed				

2. A new workspace prompt will appear. Create a name for your workspace, set an expiration date, and a description, if applicable. (See Figure 17)

Figure 17 Create New Work	space					×
1. Workspace Info	rmation	2. Add Users		3. V	iew Details	
Name: Expiration Date:						
Description:	Test					
		Next	Cancel			

3. Add users to your workspace by their email address. Specify what role you want them to be (Manager, Contributor, Viewer) (See Figure 18)

- Manager: can view, upload, and delete files. Also Add/remove users.
- Contributor: can view and upload files.
- Viewer: Can only view uploaded files

## Figure 18

. Workspace Informa	tion 2	Add Users			3. Viev	N Details		
							,	
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Isers All internal users Anyone after authentication	Add Users		© Ma		\$	Manager	*	difference of the second se

4. You can view details of your workspace, if everything is correct, click "Finish." (See Figure 19)

Create New Workspace ×							
1. Workspace Info	rmation 2. A	dd Users		> 3. View	/ Deta	ils	
Name: Expiration Date: Description:	Never Expires						
Users		Viewer	\$	Contributor	٩	Manager	٢
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Paul.mak@cpuc.ca.go	W			<b>V</b>			
hung.huynh@cpuc.ca	gov	V					
Subject:	You've been invited to st	hare files using S	ecure Wo	rkspace: Test			
Body:	Send a personal mass	age with your invi	istion				
	Do not send invitatio	n e-mail to exist	ing CPUC	Secure File Tran	sfer us	ers	
	يستبيس	and the second					
	Bi	ick Finish	Cancel				

5. Once your workspace has been created, click "Add File" to add files into your workspace. (See Figure 20)

Figure 20 Accellion			russell.lee@cpuc.ca.gov   <u>Settings</u>   <u>Help</u>   <u>Sign out</u>
File Manager	Send File		
<ul> <li>▼ Transfers</li> <li>☆ Inbox</li> <li>☆ Sent Items</li> <li>☆ Files</li> </ul>		Test Test © Sort By: Date +	Add File Options • Send Download Remote • Select All, None [0]
Workspaces View by: All   Manager  Memory All   Memory All   Manager  Memory All   Mem	d	Memo 3.docx (11.1KB) (5) Memo 4.docx (13KB) View per p	Jul 06, 2011 14:40:53 by You 🔄 Jul 06, 2011 14:40:53 by You 🔄 age: 20 💽 Showing 1-2 of 2 💽 💽

6. Click "Choose File" and select the files that you want to upload.

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7. You can create Nested Workspace, which allows you to create another workspace within the existing workspace. Click "Options" and "Add Workspace." (Refer to Figures 17-19)

### **Cloning Workspaces**

1. You can duplicate your workspace with all the same settings and user roles. Click on options, and "Clone Workspace."

2. Provide a name and description for your workspace and click "Clone."

<u>Figure 22</u>		
Clone Workspace		×
Clone all users & roles fo Cloned from Workspace	r the selected Workspace Fest	
Name:	Test_2	
	Include all nested Workspaces	
Workspace Description:	Test_2	
	Do not send invitation e-mail to existing users	
	Clone Cancel	

2. Now you have another workspace with the same settings. (See Figure 23)

Accellion 🦈	*		russell.lee@cpuc.ca.gov   <u>Settings</u>   <u>Help</u>   <u>Sign or</u>
File Manager	Send File		
* Transfers	1	Test_2	٩
😭 Inbox		Test_2	
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Files			
Workspaces		Sort By: Date +	
View by: All   Managed		No Workspaces/files found.	
🕨 🙆 Test			
4 🗂 Test_2			

# **Subscribing to notifications of Workspaces**

1. By default, you are subscribed to email notifications of files added and comments posted within your workspace. You can change it by clicking on "Options" and "Subscribe for Notifications." (See Figure 24)

# Figure 24

\$ Subscribe for Notifications ×				
Subscribe for notification on Workspace Test when:				
Files added				
Comments added				
Note: This will apply to all nested Workspaces				

## Versioning Control in Workspaces

1. Managers and Contributors can upload different versions of documents, and set up which version to be the default. Click "Add File" and upload the updated version of the file. (See Figure 25)

Cancel

Save

- The blue arrow indicates that there are different versions uploaded.
- You may add comments by clicking on the speech bubble (Pointed by the red arrow).

Figure 25 Accellion	untite of the second		russell.lee@cpuc.ca.gov	<u>Settings   Help   Sign (</u>	out
File Manager	Send File				
Transfers		Test	······	٩	
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		View per page: 20 💽	howing 1-2 of 2 💽 💽		

2. If you click on the blue arrow, you can select which version will be current. (See Figure 26)

# Figure 26

Previous Versions: Memo 3.docx
Sort By: Version Date

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Current Version	Remove	by You
Memo 3.docx (11.1)	<b>(B</b> )	Jul 06, 2011 16:52:19

Close

CPUC Secure File Transfer Program – Configuring, Sending, Receiving Attachments July 13, 2011

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