Montana File Transfer Service

General Description:

The State of Montana's File Transfer Service (FTS) allows for easy transfer of large electronic files to and from customers of State Government. It is designed to facilitate file exchange when files are too large for email. It also allows for secure transfer of sensitive data (**attachments only – do not include sensitive information in the message!**). The transfer of files must include a State of Montana email address on either the sending or receiving end. State employees can send files to other State employees or External FTS Montana customers. External FTS Montana customers are <u>only</u> able to send files to State employees.

Sending or receiving files via FTS requires an Okta Montana account.
State of Montana employees: do <u>not</u> create an Okta account, login as directed below.

The service requires a web browser, no other software is needed to transfer a file. All aspects of the file transfer are securely encrypted, ensuring that customers meet all security requirements under State and Federal information privacy regulations. Files are scanned for viruses during transfer. An automated reminder system notifies the recipient of files they have available for download. The system tracks receipts for all transfers, showing detailed information about when a file is uploaded and downloaded. Customers can upload files as large as 2GB. Files must be downloaded within fifteen (15) days, after which the transfer expires and the files are automatically removed from the service.

Creating an Account

State of Montana Employees Only:

Do NOT create an account. State employees already have accounts. Proceed to login below.

External Okta Montana Customers:

NOTE: If you have received an FTS email, the account you create must match the email address the FTS email was sent to. For example, if a State employee emailed John Doe at jdoe@gmail.com, then John must setup an Okta account using the jdoe@gmail.com email address.
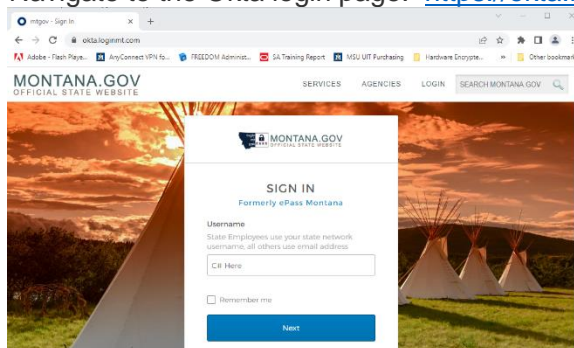
To setup an account:

1) Navigate to https://okta.loginmt.com/
2) Signup for a standard Okta account by clicking the blue "Sign up" link at the bottom of the login pane. Fill out the required information and click Register. Confirm your account.
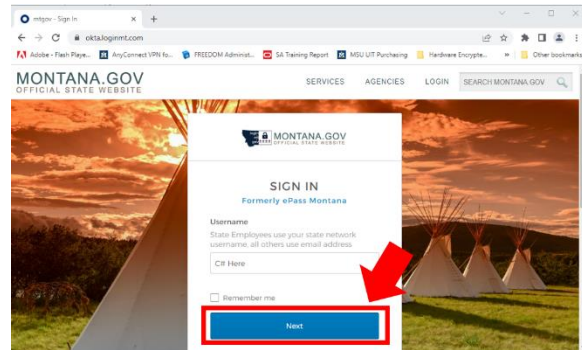

Logging In

State Employees:
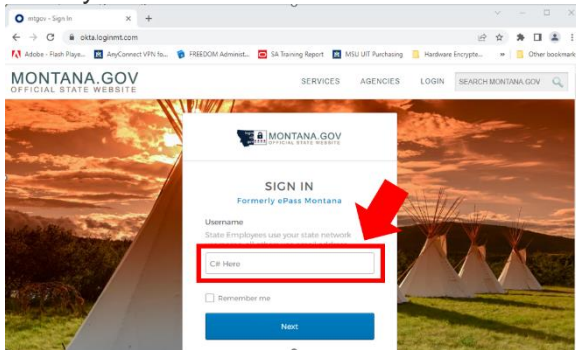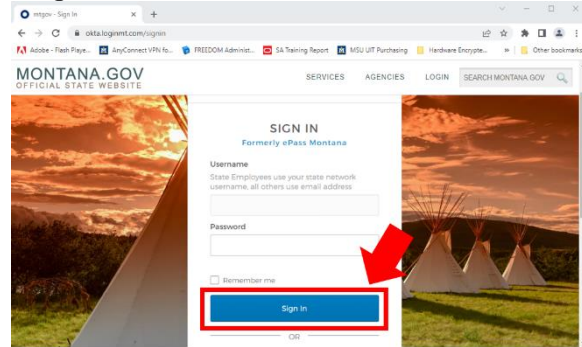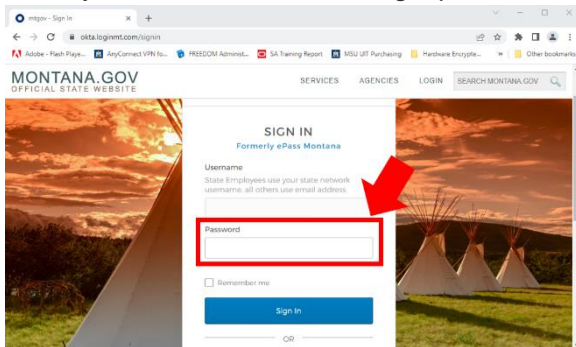
1) Navigate to the Okta login page: https://okta.loginmt.com/

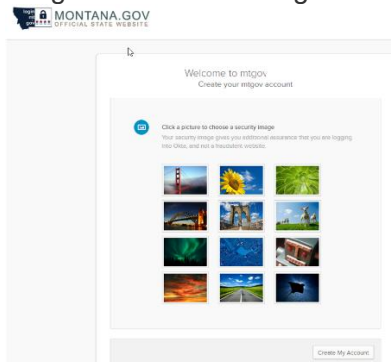2) Enter your C# or HR# into the Username box and click Next.

3) Enter your State / Timesheet login password and click Sign In.

4) You will see one of two screens:
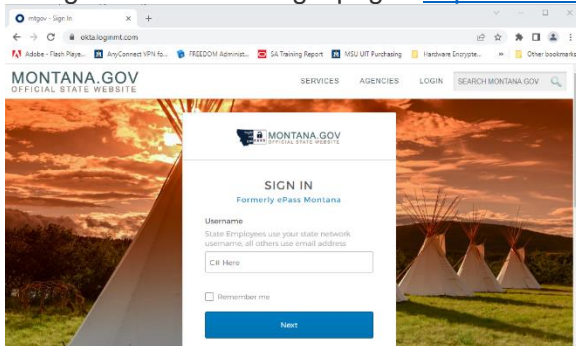   a. If this is the first time you are logging in with your C#/HR#, the system will ask you to choose an account image. Choose an image and click "Create My Account".
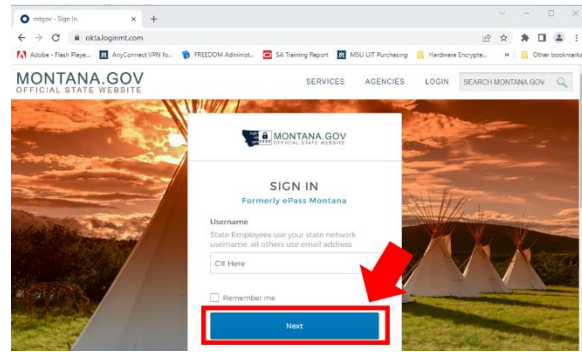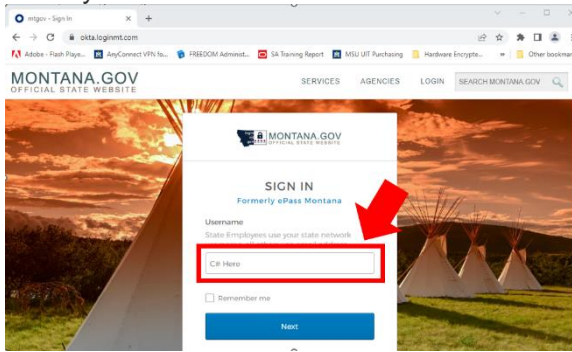

   b. If you have signed in previously with your C#/HR#, you will be taken directly to the Okta application screen.

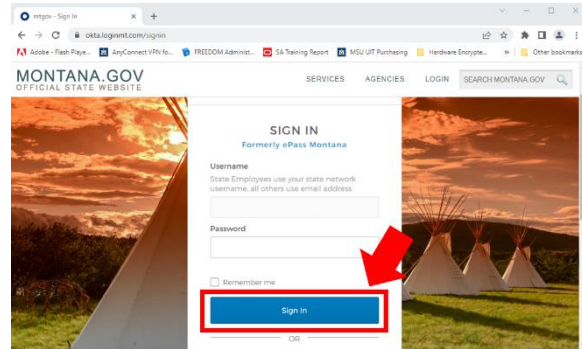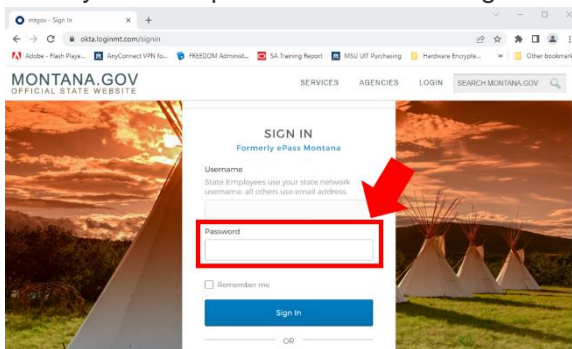**External Okta Montana Customers:**

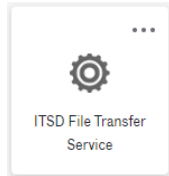1) Navigate to the Okta login page: https://okta.loginmt.com/

2) Enter your email address into Username box and click Next

3) Enter your Okta password and click Sign In

4) Choose the ITSD File Transfer Service application icon to access FTS.

Inbox Management

After logging in, you will be able to view your sent and received files. You will also see the option to send files. If you wish to sort the sent or received files by name, file, date, or status, simply click (for ascending) or double click (for descending) the column label in the title bar. To delete files, you must check the box(es) to the left of the file(s) and then select the "Delete Selected File(s)" button at the top of the page.

File Transfer Status

Following are the status definitions for files transferred:

- **Processing File:** This will occur immediately after the file is uploaded. The file is migrated to the server and waiting for a virus scan.
- **Incomplete - Select Recipients:** The file has been moved onto the server, but it doesn't have a recipient available to download the file. To Add a recipient, select the file name and you will then be able to add recipients to the file.
- **In Transit:** The file is in the process of being moved to another server.
- **Scanning for Viruses:** The file is being scanned for viruses. If a virus is found, you will be notified through email and the file will be immediately removed from the server. It will not be available for download.

- **Complete:** The file has resided on the server for the maximum of 15 days and has been removed. The file can no longer be downloaded.
- **Ready for Download:** The file has been scanned for viruses and is ready for the recipients to download.

Sending Files

1. To send a file you must select the "Send a New File" button.
2. Drag and drop files into or click anywhere in the gray box on the page to select your files. If you would like to add more files, simple drag and drop the additional files or again click the gray area of the screen.
3. To remove a file, click the "Remove File" button.
4. When satisfied with file selection(s), click the "Continue" button.
5. Select the recipient(s) of the files:
   o State Employee or External FTS Montana Customer.
      1. Add a state employee by using the lookup and clicking the button with their name on it to add them to the To box. **Do not manually enter an email address in the To box**.
      2. To remove a recipient, click the "x" to the right of their name in the To box.
      3. On the bottom right of the page, you can enter a message to send with the file(s). **NOTE: This message is sent in clear text to the recipient. It is not encrypted. Do <u>not</u> enter sensitive information into this message box.**
      4. When you are satisfied with your recipients and message, click the "Send" button.
6. A receipt containing the recipient(s) and the file(s) that you sent will appear. You can print the receipt or go to the home page.

Receiving Files

1. To view the received file(s), select either the Received or the Sent tab, then click the name of the files to see the details of the file transfer.
2. When the status says it is "Ready to Download", select the file that you wish to download.
3. To download, select the "Download File" button, and then open or save the file.

* PLEASE NOTE: Once a file's status is **"Completed"**, you are no longer able to download or view that file.

MT Drive

Rules of Use:

1. Only State employees are allowed to create shareable folders. Each State employee is allocated 20 GB of storage in their Drive.
2. The State employee can invite any other user (state or non-state employee) to the shared folder with either of the following permissions:
   o EDITOR – can upload files into the shared folder, can remove files from the shared folder, can download files on the shared folder.
   o VIEWER – can download files in the shared folder.
3. The folder owner can un-invite user(s) to the shared folder.
4. When a State employee leaves, all permissions on the folder are removed and the files reside in the system for 30 days. Supervisors can request that files be transferred to them. If no transfer request is received within 30 days, the files are deleted.

Setting Up Folders & Adding Files:

1. Files can only be uploaded inside of a folder. You can create an unlimited number of folders.
2. To add a folder to your account you must select the "Add New Folder" button. Provide a name for your folder in the popup window and click the "Save Changes" button.
3. To add files to a folder, click on the folders name. Once inside the folder, you can add files by selecting the "Add New File(s)" button.
   - Drag and drop files into or click anywhere in the gray box on the page to select your files. If you would like to add more files, then simple drag and drop more or click in the gray area of the screen again.
   - To remove a file, click the "Remove File" button.
   - When satisfied with file selection(s), click the "Continue" button.

Inviting Users:

1. After you click on the name of the folder you would like to add a user to, you can click on the Invite button on the left side of the screen to choose to invite Viewers or Editors.
2. You can add a state employee by using the lookup and clicking the button with their name on it to add them to the To box or you can simply type their email address directly inside the To box.
3. You can add an External FTS Montana Customer by typing their full email address into the To box.
4. To remove a recipient, click the "x" to the right of their name in the To box.
5. On the bottom right of the page, you can enter a message to send with the invitation to the folder.
6. When you are satisfied with your invitees and message, click the "Send" button.

Downloading & Removing Files/Folders:

1. To download a file, check the box next to the file. Click the "Download Selected File(s)" button, and then open or save the file.
2. To delete a file or folder, check the box next to the file or folder. Click the "Remove Selected File(s)" or the "Remove Selected Folder(s)" button.
3. To work with multiple files, use the check boxes to select multiple files and then click on "Download Selected File(s)" or "Remove Selected File(s)"

* PLEASE NOTE: You must delete all the files inside of a folder first so that it is empty before you can delete a folder.

Troubleshooting & More Information

For troubleshooting or for more information, visit the State of Montana Okta Help portal: https://okta.mt.gov/Help