Overview

The Florida PALM Secure File Share portal has been created to allow agencies and the Project to share documents that contain sensitive or confidential information. Below are the instructions on how to use the Florida PALM Secure File Share Portal.

Managing Access

Agency Sponsors are responsible for managing (granting and removing) access to the Florida PALM Secure File Share portal. Agency Sponsors must complete this form to grant or remove access to the Florida PALM Secure File Share portal (see Figure 1). This form should be completed by Agency Sponsors **only**, and access should only be given to members of the agency's CCN.

Figure 1: Secure File Share Access Form

NOTE: *Agency Sponsors should take careful consideration in who is selected to have access to the Secure File Share portal. The individuals selected should understand their agency's policies related to viewing, storing, and sharing files with sensitive or confidential data.*

Once access has been granted by the Project, an email confirmation will be sent to the user with a link to access the portal. CCN members who have been granted access will be identified in the Agency's CCN Worksheet in Smartsheet, in the *Access to Secure File Share Portal* column maintained by the Project.

When a form has been submitted to remove user access, the Project will remove the users access to the Florida PALM Secure File Share portal, as well as remove them from the *Access to Secure File Share Portal* column in the Agency's CCN worksheet. An email notification will then be sent to the Agency Sponsor, confirming that the request was completed.

Navigation

The Secure File Share portal is developed in the Florida PALM SharePoint site and is organized for agencies with an intuitive file folder structure. Users who have been granted access can navigate to the portal using this link.

NOTE: It is recommended that users bookmark this link for ease of future access.

1. On the Secure File Share homepage, navigate to your agency's folder using the Libraries menu found on the top left (see Figure 2).
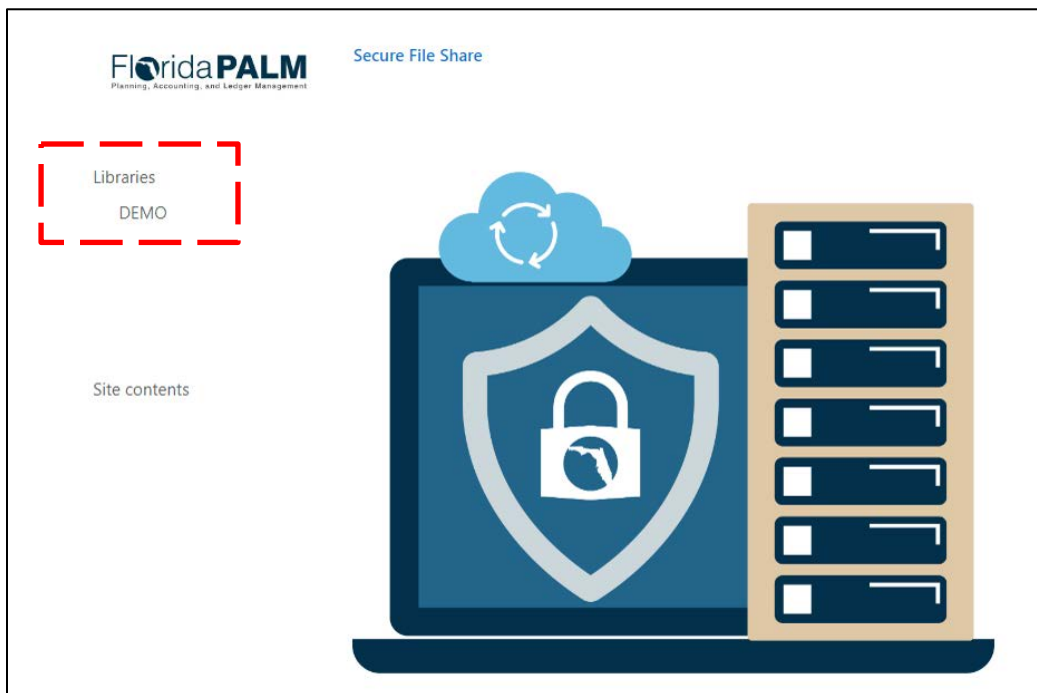

Figure 2: Secure File Share Main Page

2. Within your Agency specific folder, you will have access to additional folders and documents (see Figure 3).
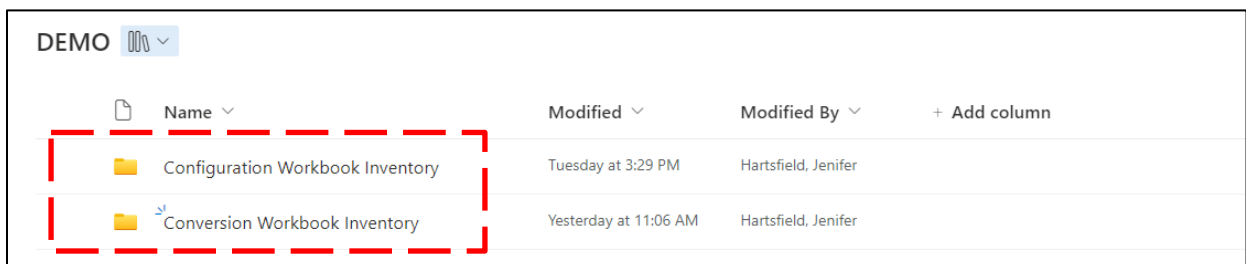

Figure 3: Agency Folder main page

Using the Secure File Share Portal

Uploading a file

3. To **Upload** a file:

   a. Click "Upload", then click "Files" (See Figure 4)

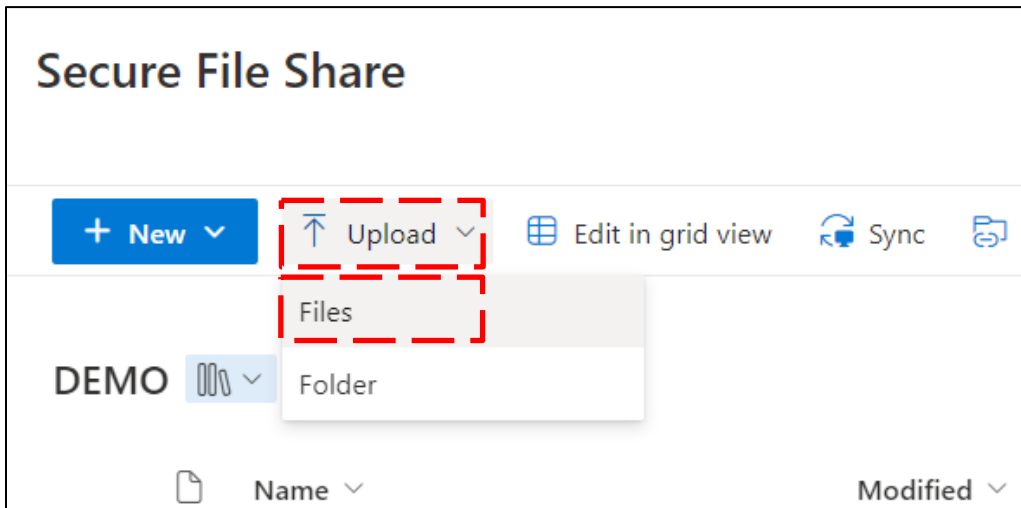*Figure 4: Upload File*

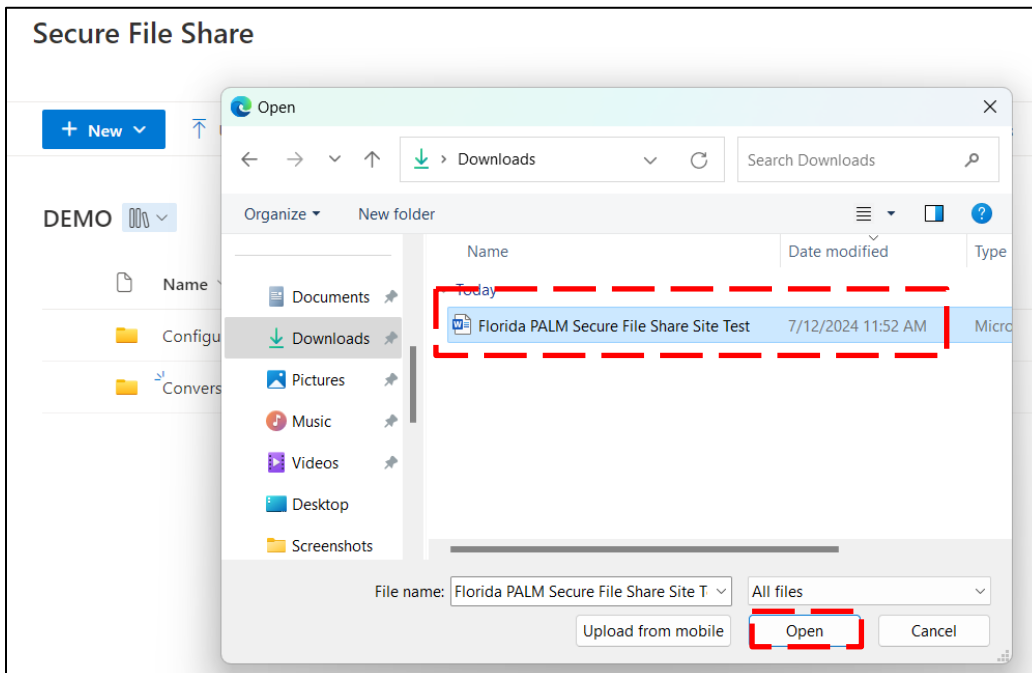   b. Select the document to upload and then click "Open" (See Figure 5)

Figure 5: Select File

   c. Check in the file

Checking in a file

4. To **Check In** a file:

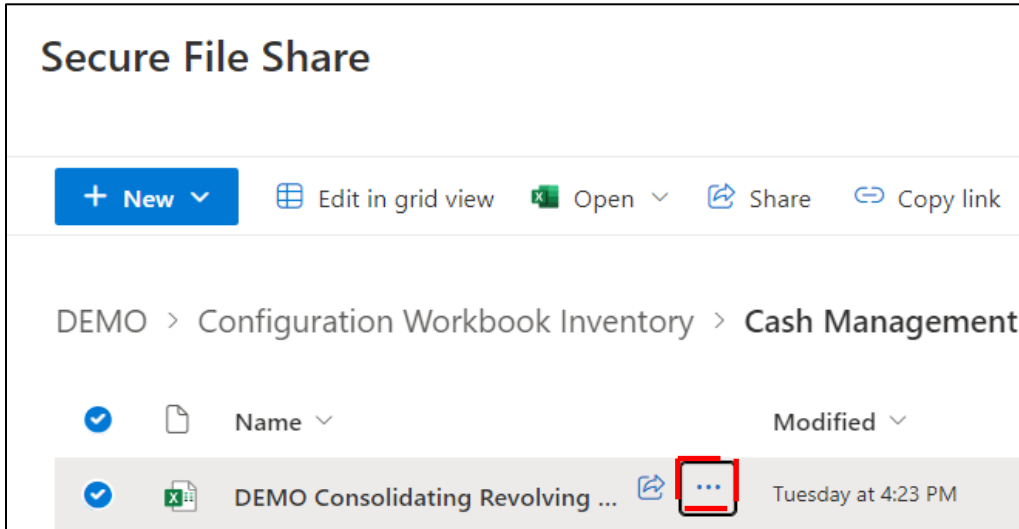   a. Open the Options by clicking the dots beside the selected file name (See Figure 6)

Figure 6: File Options

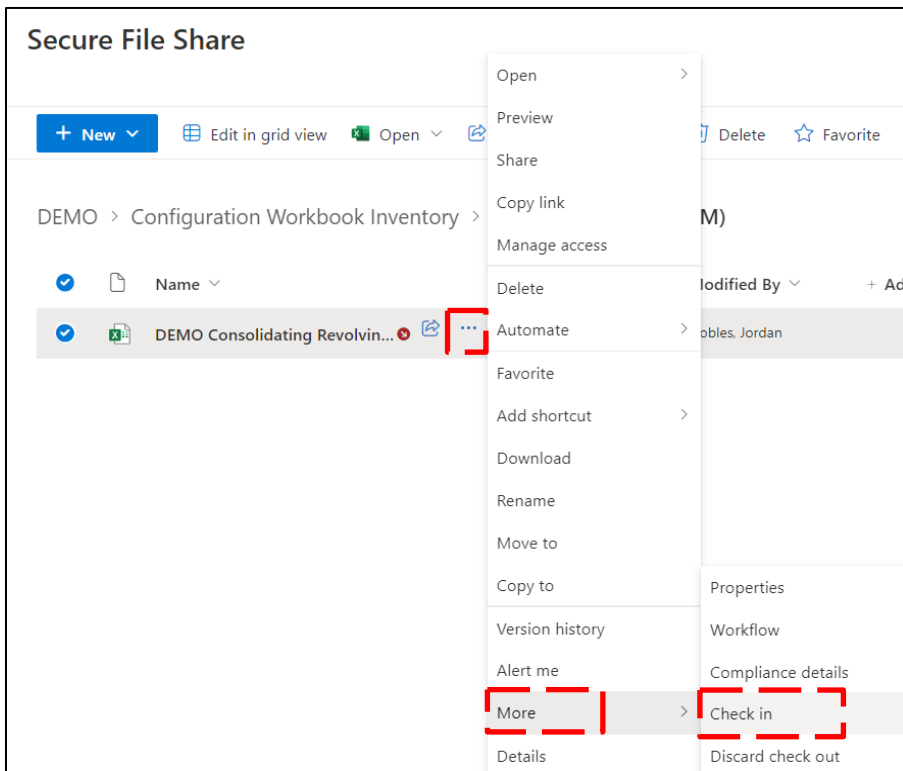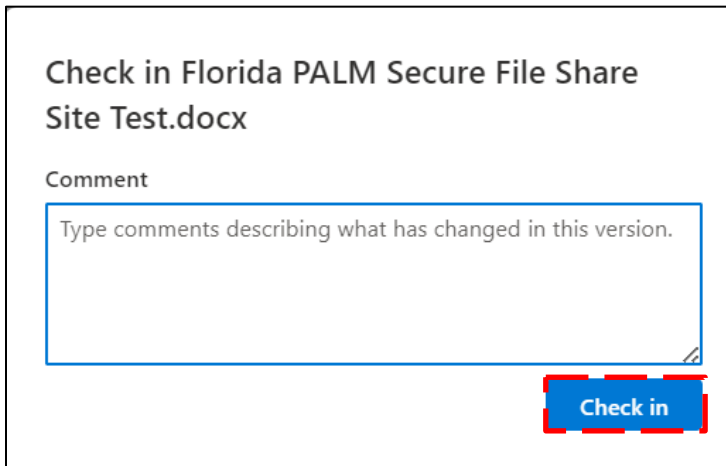   b. Click on "More" > "Check In" (See Figure 7)

Figure 7: Check In

c. Insert comments (if necessary) and click "Check In" (See Figure 8)

Figure 8: Check in Comments

NOTE: *Only the person who has the file checked out can make edits. No one else will be able to make edits to the file until it is checked back in.*

Checking out a file

5. To **Check Out** a file:

a. Open the Options for the selected file (three dots)

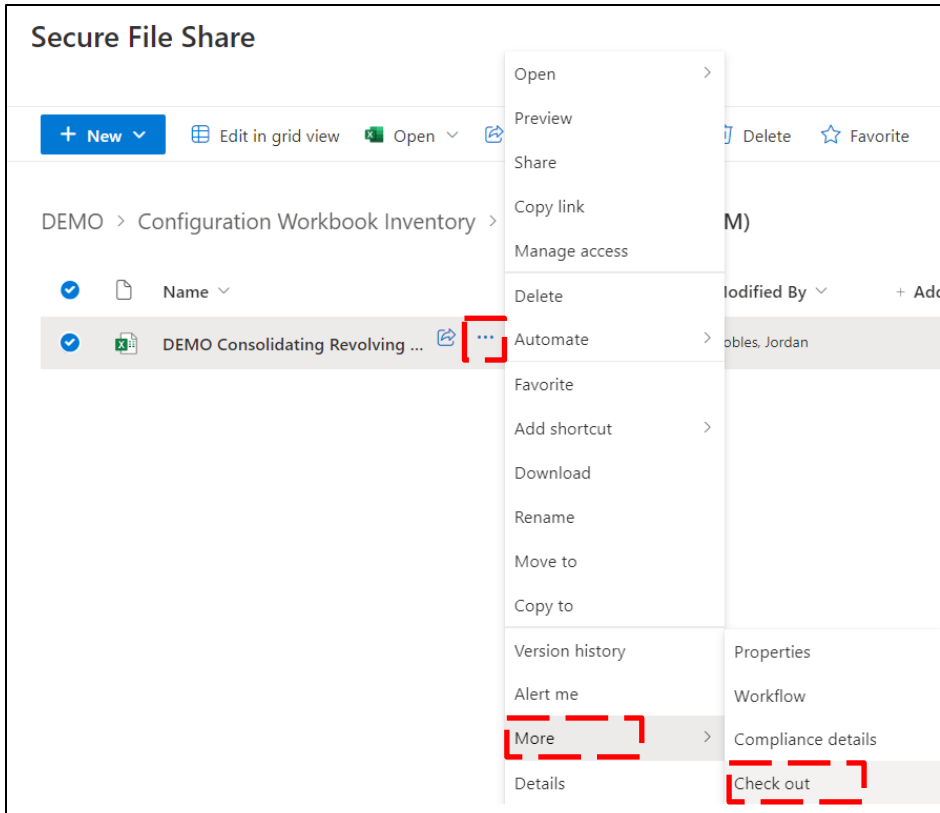b. Click on "More" > "Check Out" (See Figure 9)

Figure 9: Check Out

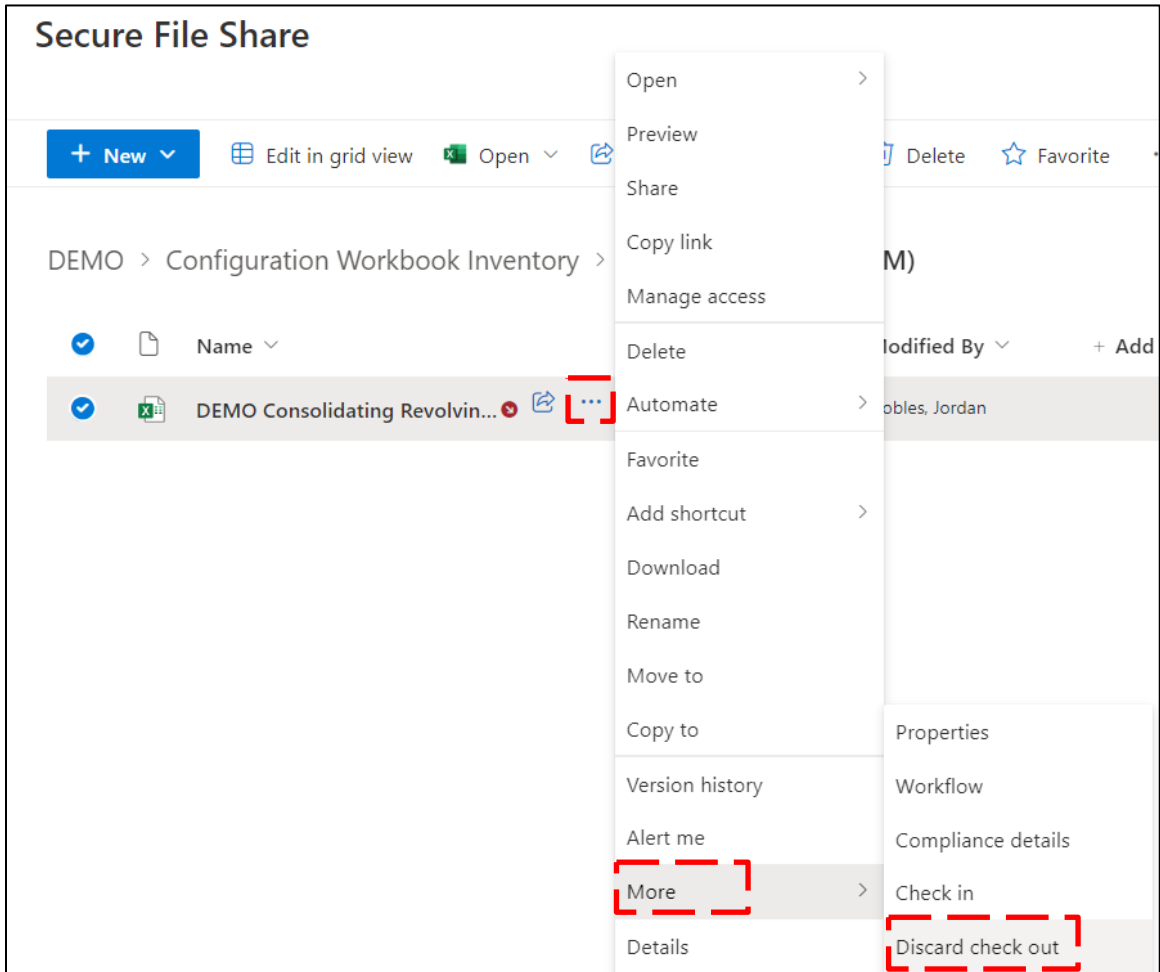c. If you accidentally checked out an item, you can discard the check out (See Figure 10)

Figure 10: Discard Check Out

Editing a file

6. To **Edit** a file:

    a. Open the Options for the selected file

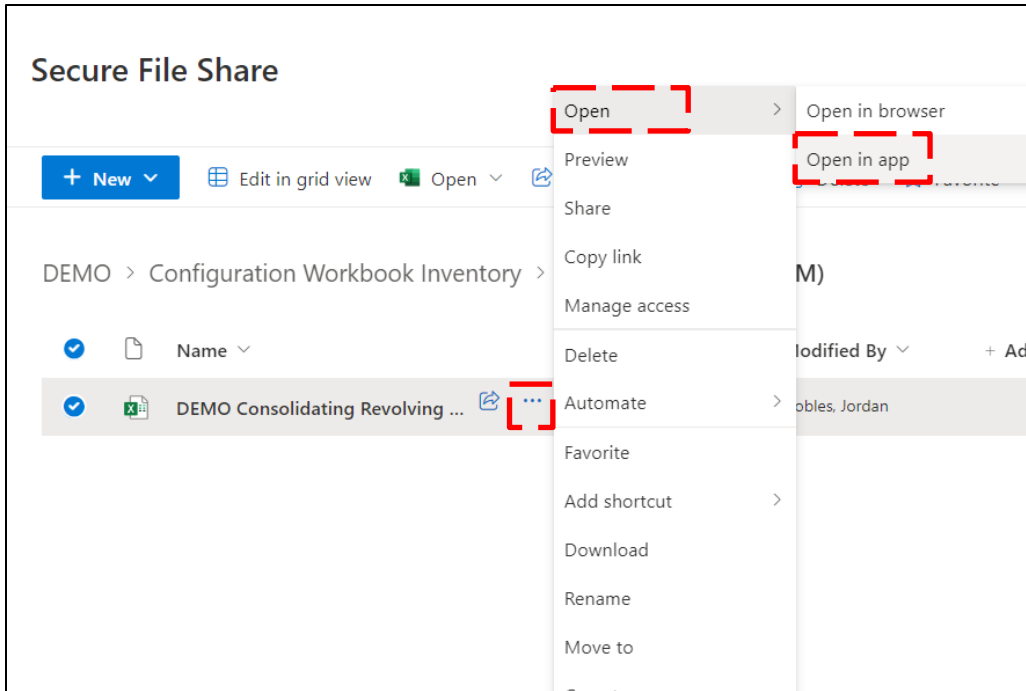   b. Click on "Open" > "Open in App" (See Figure 11)

Figure 11: Open in app

c. Make and Save edits in app

d. Exit and Check In the document, insert comments (optional) and click "OK" to check it in (See Figure 12)
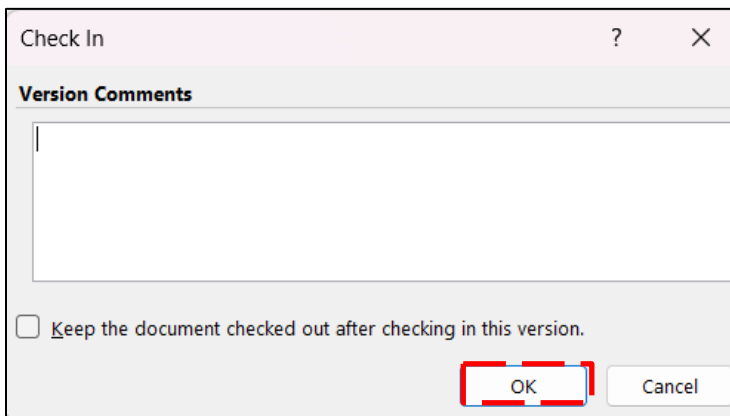

Figure 12: Check In from app

Downloading a file

7. To **Download** a file:

a. Open the Options for the selected file
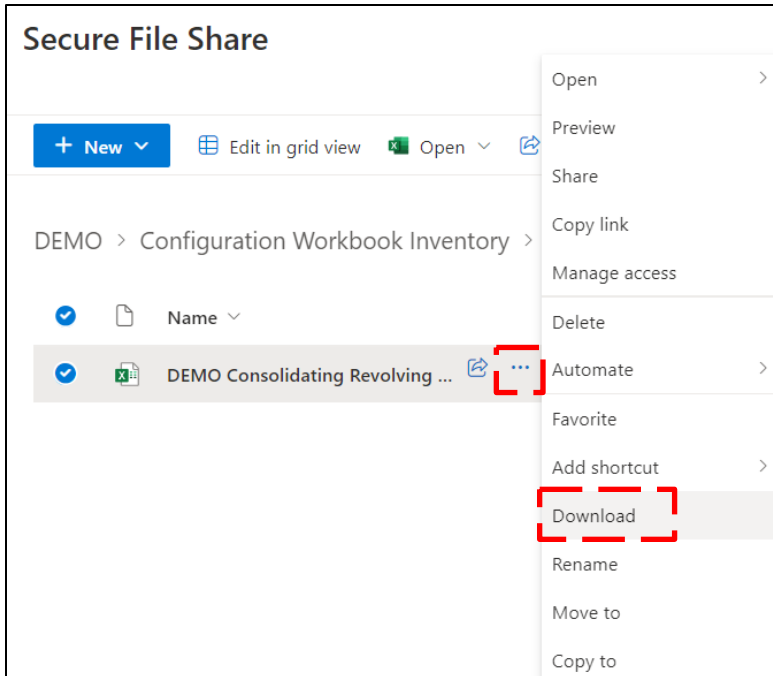
b. Click on "Download" (See Figure 13)

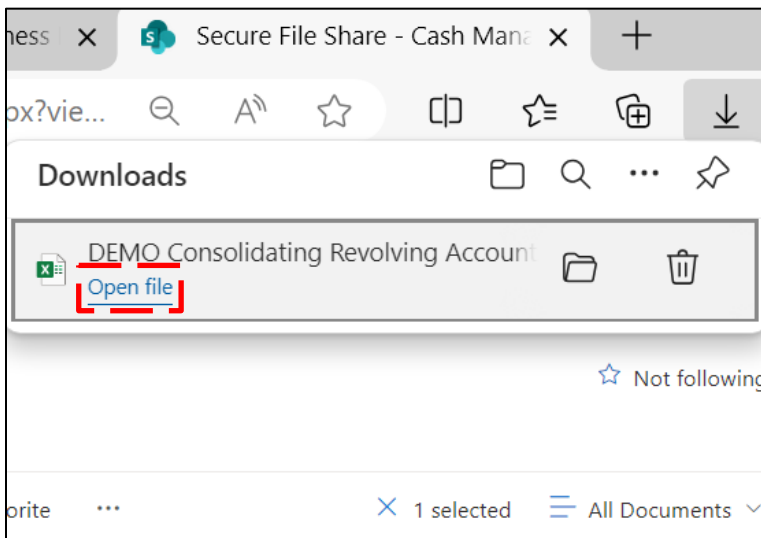*Figure 13: Download*

c. Click "Open file" (See Figure 14)

Figure 14: Open Downloaded File

Restoring a file

8. To **Restore** a previous file version:

a. Open the Options for the selected file
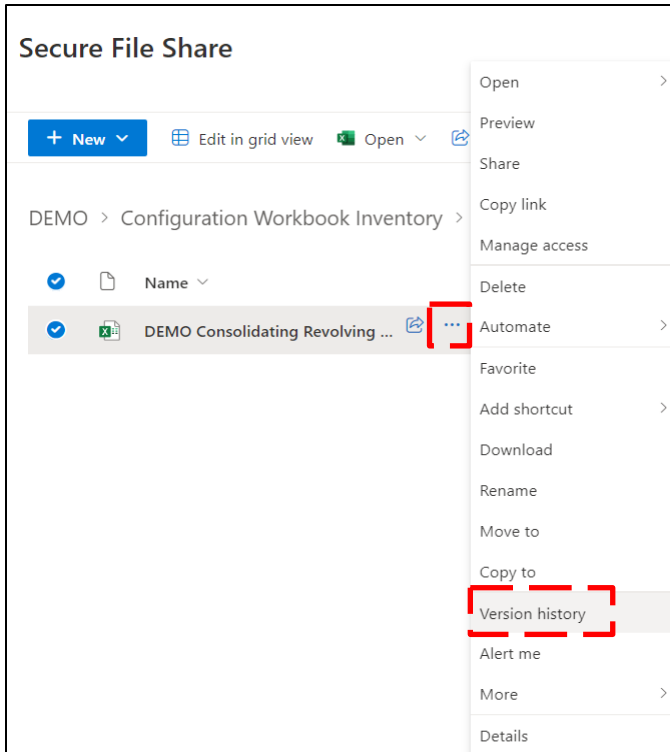
b. Click on "Version History" (See Figure 15)

Figure 15: Version History

c. Select the date of the file you would like to restore, and click "Restore" (See Figure 16)
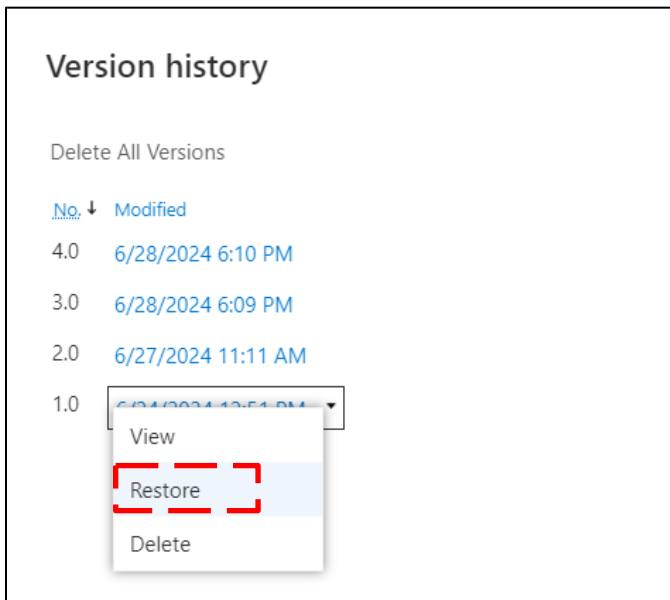

Figure 16: Restore File