

AptaFund's New Secure Document Download Site

Harris School Solutions has installed a new secure document download site on the AptaFund Servers. This site was installed to address security issues raised by some IT departments and auditors.

The new site can be accessed by choosing the **Log on to My AptaFund Documents** link on the AptaFund Start page as shown below. It can also be accessed by entering the following web address in your browser address bar:

<https://mydocuments.harriscomputer.com/thinclient/login.aspx>

HARRIS
School Solutions

Support Contact

Change My Password

AptaFund Start Page

AptaFund Alerts:

*****UPDATED 07/07/2010*****

AptaFund Update 113 has been installed! AptaFund 3.00 Update 113 contains a number of new items. Read more about Update 113 [HERE..](#)

to **AptaFund Help**

Note - The first time you visit the AptaFund Login Page, you will be prompted to install the "Remote Desktop ActiveX Control" from Microsoft. Please click "yes". The installation will take a few seconds, and then you can click the "Connect" button to log in to AptaFund. (*This link opens a pop-up.*)

to **My AptaFund Documents Help**

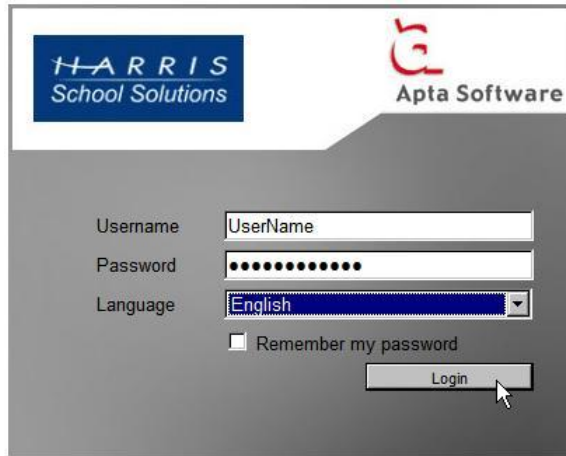
If you experience problems logging on to AptaFund or My AptaFund Documents, click the "Help" links on this page. If you still experience problems, please contact AptaFund Support at support@harriscomputer.com or (toll-free) 1-866-450-6696.

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AptaFund Start Page

When you choose the log on link, a new window will opened and will display the My Documents login screen as shown below.

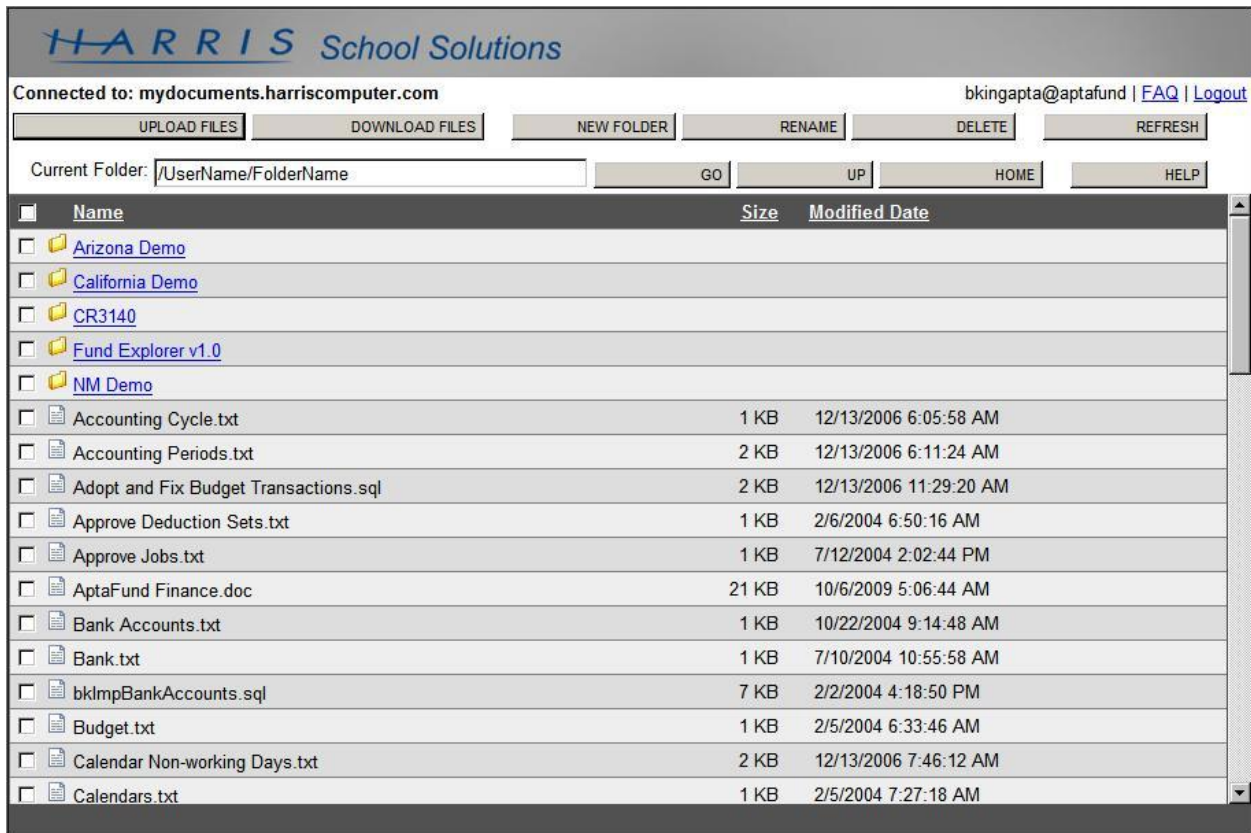
Enter your AptaFund username and password and choose **Login**.



My Documents Login Screen

When you successfully login, you will be presented with a listing of the files contained in your AptaFund My Documents folder. Files will be plain text and folders will be links to the contents of those folders.

Note the checkbox next to each entry in the list. This checkbox will be used to perform the file commands described in the next section.



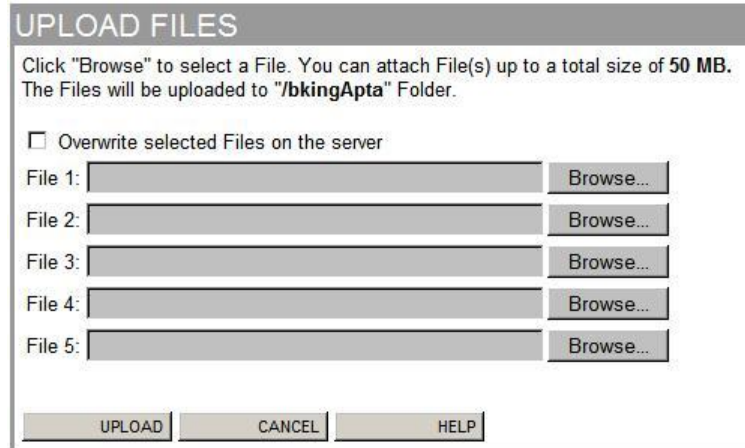
Main My Documents Listing

File and Folder Operation Commands

The following commands can be performed on files and folders in the My Documents list:

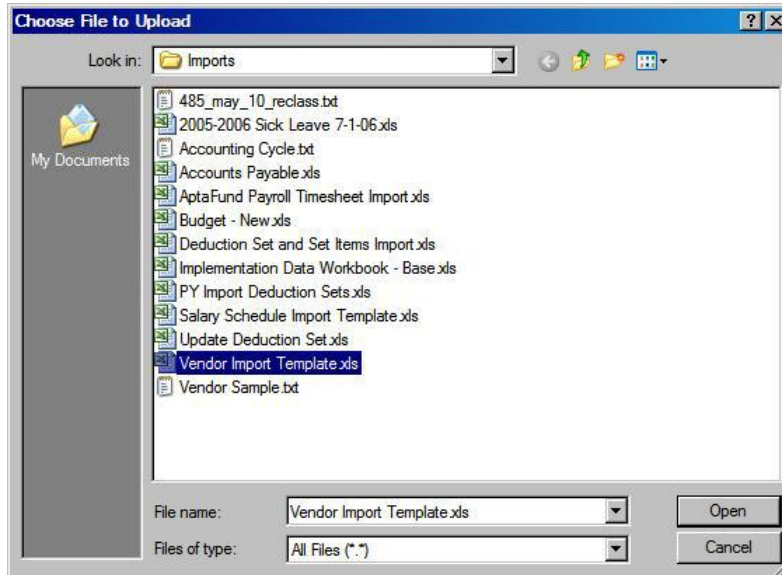
Upload Files Button

The Upload Files command allows you to copy files located on your local computer or network up to the AptaFund servers directly into your AptaFund My Documents older. When you choose the Upload Files button the Upload Files screen will be displayed as shown next.



Upload Files Screen

Choose the **Browse** button for the first file that you wish to upload. The Choose File to Upload dialog box will be displayed.



Choose File to Upload Dialog Box

The dialog contains a list of the files and folders located on your local computer. Select the file that you wish to upload and choose the **Open** button. You will be returned to the Upload Files screen and the path to the file will be displayed in the **File 1** text box.

Choose the **Browse** button for any additional files that you wish to upload. You may upload up to five files.

Once you have selected all the desired files, choose the **Upload** button in the bottom left corner of the screen. The file transfer will begin.

Once all the files have been transferred you will be returned to the My Documents folder listing and the following message will be displayed:



File Upload Success Message

Download Files Button

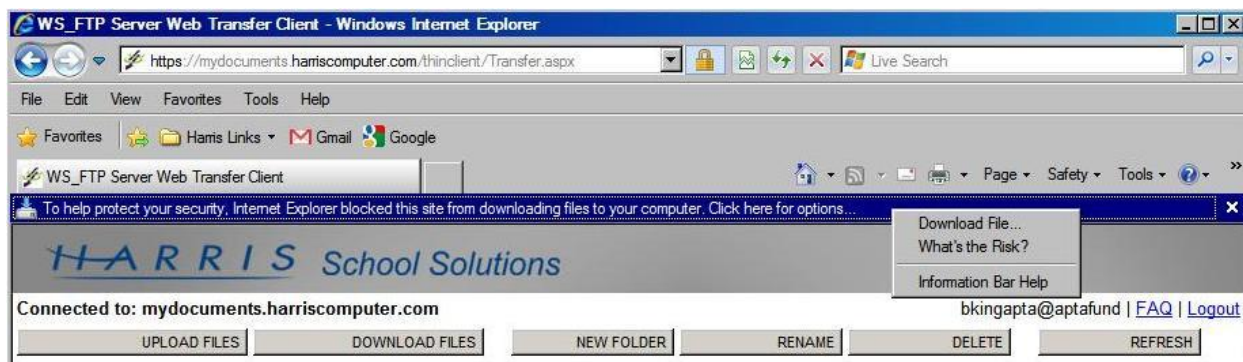
The Download Files button allows you to transfer a selected file that has been saved to your My Documents folder to your local computer or network.

Note: The secure document download site only allows you to download one file at a time.

To download a file, log into the My Documents and locate the file that you would like to download. Mark the checkbox located next to the file name in the list and choose the **Download Files** button at the top of the screen.

You may also simply click on the name of the file to download the file as well.

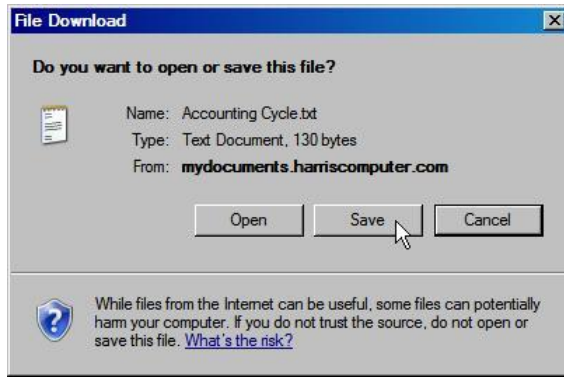
Note - You may receive the following warning at the top of the screen in Internet Explorer when you choose the Download Files button or click on the file name:



Download File Security Information Bar Warning

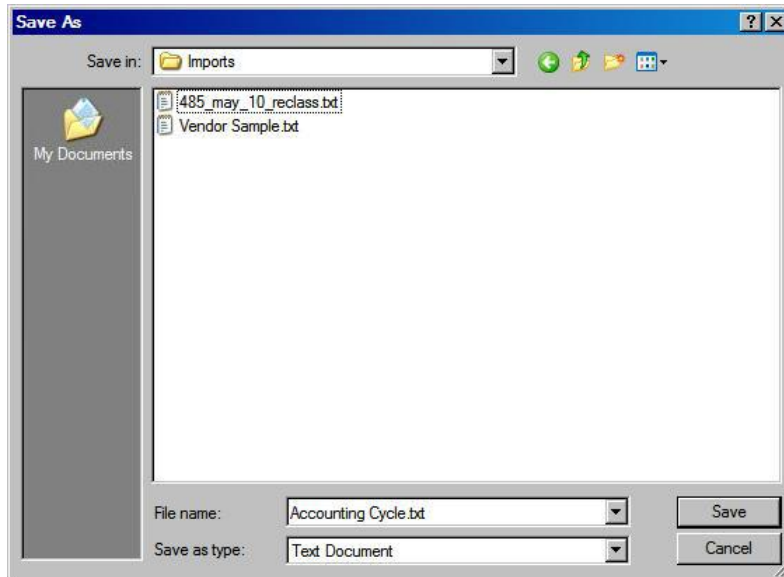
Click on the download file security information bar warning and choose **Download File...** from the popup menu displayed.

Once the download warning has been cleared, the File Download confirmation screen will be displayed as shown next.



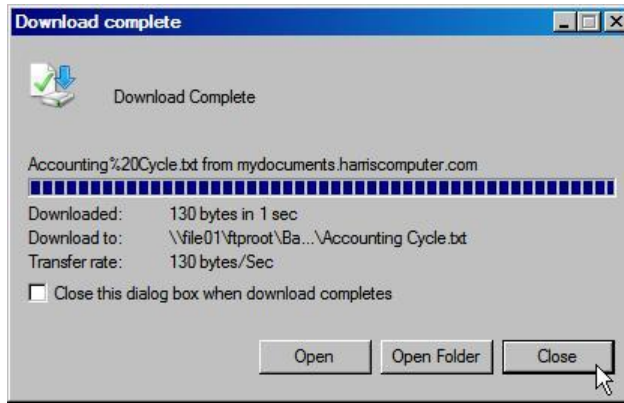
File Download Confirmation

Choose the **Save** button on the File Download confirmation dialog box. The Save As dialog box will be displayed.



Save As Dialog Box

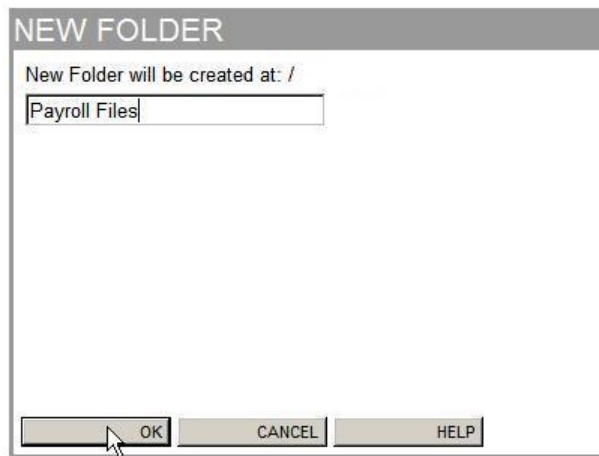
The Save As dialog box allows you to navigate the folders on your local machine and network. Once you have found the folder that you wish to save the file, choose the **Save** button. The download progress dialog box is displayed and will indicate when the download is complete.



Download Progress Dialog Box

New Folder Button

The New Folder button allows you to create a new folder in the location that you are currently viewing. To create a new folder choose the **New Folder** button. The New Folder screen will be displayed as shown next.



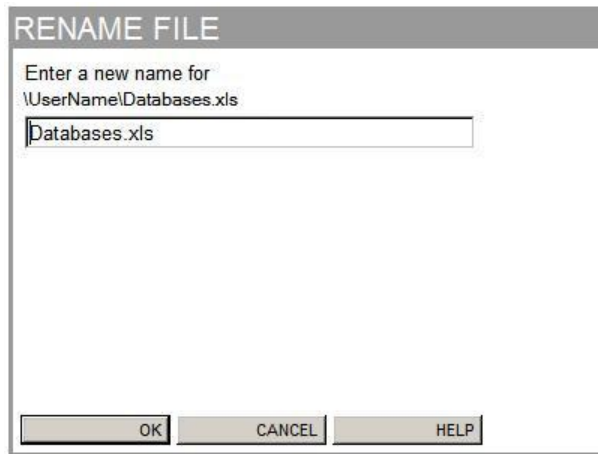
New Folder Screen

Enter the name of the folder and choose the **OK** button. You will be returned to the folder list and the new folder will be available for saving files, etc. Choose **Cancel** if you do not want to create the folder.

Rename Button

The Rename button allows you to change the name of a file or folder listed in your My Documents folder.

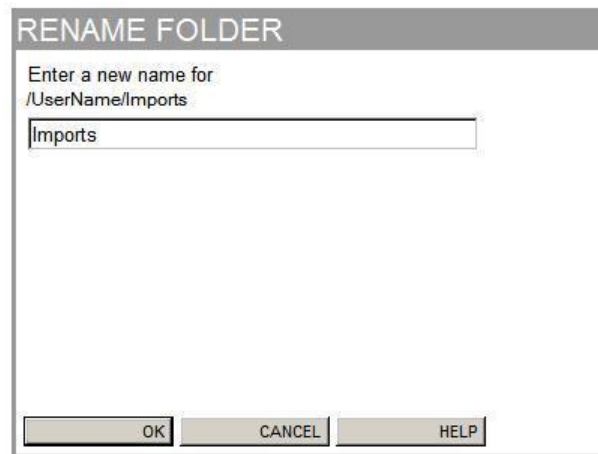
To rename a file, mark the checkbox next to the name of the file that you want to rename and choose the **Rename** button. The Rename File screen will be displayed as shown next.

A dialog box titled "RENAME FILE" with a grey header. The main area contains the text "Enter a new name for" followed by the file path "\UserName\Databases.xls" and a text input field containing "Databases.xls". At the bottom, there are three buttons: "OK", "CANCEL", and "HELP".

Rename File Screen

Enter the new name of the file and press the **OK** button. Choose **Cancel** if you want to cancel the renaming process.

To rename a folder in the list, mark the checkbox next to the folder whose name you want to change and choose the **Rename** button. The Rename Folder screen will be displayed as shown next.

A dialog box titled "RENAME FOLDER" with a grey header. The main area contains the text "Enter a new name for" followed by the folder path "/UserName/Imports" and a text input field containing "Imports". At the bottom, there are three buttons: "OK", "CANCEL", and "HELP".

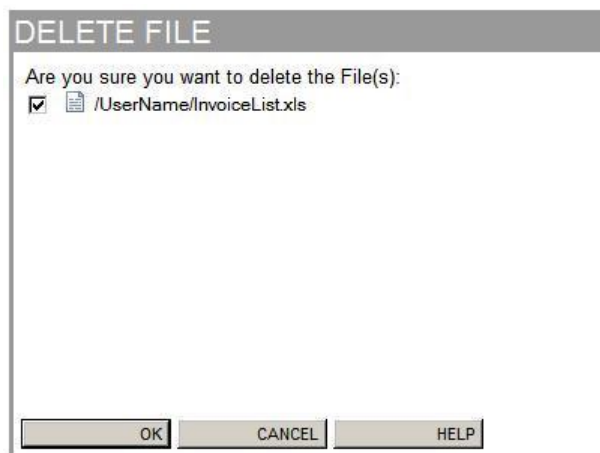
Rename Folder Screen

Enter the new name of the folder and press the **OK** button. Choose **Cancel** if you want to cancel the renaming process.

Delete Button

The Delete button allows you to delete a file or folder listed in your My Documents folder.

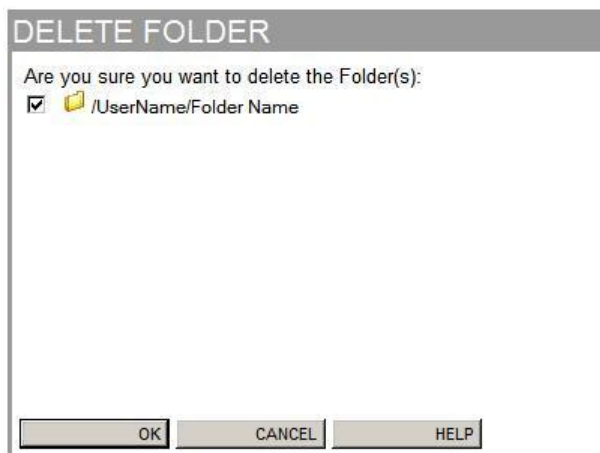
To delete a file, mark the checkbox next to the name of the file that you want to delete and choose the **Delete** button. The Delete File confirmation screen will be displayed as shown next.



Delete File Confirmation Screen

Choose the **OK** button to continue with the deletion of the file. Choose **Cancel** if you do not wish to delete the file.

To delete a folder, mark the checkbox next to the name of the folder that you want to delete and choose the **Delete** button. The Delete Folder confirmation screen will be displayed as shown next.



Delete Folder Confirmation Screen

Choose the **OK** button to continue with the deletion of the folder. Choose **Cancel** if you do not wish to delete the folder.

Note: Deleting a folder will also delete all the files contained in the folder. Use this command only if you are sure you want to delete the folder and all its contents.

Refresh Button

The refresh button reloads the list of files contained in the current folder you are viewing and will display any files that may have been added since the time that you first logged into the My Documents site.

Help Button

Choosing the Help button will display the help file for this Secure Documents Download application.

Directory Navigation Commands and Sorting Files

The following commands allow you to navigate through the document and folders listing and allow you to reorder how the files are presented in the listing.

Viewing Files in a Folder

If you click the link of a folder name in the My Documents listing, the folder will be opened and the files contained in the folder will be displayed.

Go Button

Entering a folder location in the text box next to the Go button and choosing **Go** will take you directly to that folder. To use this function, the text in the text box next to the Go button must start with a forward slash followed by your username another forward slash and then the name of the folders to which you would like to jump.

For example: If you had a Payroll folder that you wanted to jump to you would enter the following:

```
/UserName/Payroll
```

To jump to a subfolder named FY2010 in the Payroll folder you would enter:

```
/UserName/Payroll/FY2010
```

After entering the folder path choose the **Go** button

Up Button

The Up button allows you to navigate from the current folder you are viewing to the parent folder. In our example above, if you were viewing files in the FY2010 folder and you wanted to quickly navigate to the Payroll folder you would choose the **Up** button once. Pressing it again will take you to the main listing of your My Documents folder.

Home Button

When chosen, the Home button will navigate you from whatever folder you are currently viewing to the main listing of your My Documents folder. In the example above instead of choosing the Up button twice, you could use the Home button.

Sorting the File List

To change the sort order of the list of files in your My Documents folder click the underlined column row title to sort ascending by that column. Click again to sort in descending order.

The screenshot shows the Harris School Solutions interface. At the top, it says "HARRIS School Solutions". Below that, it indicates the user is connected to "mydocuments.harriscomputer.com" and shows the user's email "bkingapta@aptafund" with links for "FAQ" and "Logout". There are several action buttons: "UPLOAD FILES", "DOWNLOAD FILES", "NEW FOLDER", "RENAME", and "DELETE". A "REFRESH" button is also present. The "Current Folder" is "/bkingApta/Import Worksheets", with "GO", "UP", and "HOME" buttons next to it. A "HELP" button is located below the folder path. The file list below has three columns: "Name", "Size", and "Modified Date". The "Name" column is underlined. The list contains two files: "Imports - Account Structure.xls" (25 KB, 6/24/2008 5:25:24 AM) and "Imports - Budget Management.xls" (18 KB, 8/19/2008 5:14:18 AM).

Sorting the My Documents List by the Name Column