HELP

by Techfino

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1. CLEANSWEEP FILE MANAGER – QUICK START GUIDE

Upon installation of the software, you will see the CleanSweep selection under the Setup menu. Choose "Setup & Configuration" in the sub menu to configure your settings.



Fig. 1 – CleanSweep selection under the Setup menu in NetSuite reveals Setup & Configuration and File Browser

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(http://techfino.com/wp-content/uploads/2017/06/fig1a.jpg)

Fig. 1a – CleanSweep selection under the Setup menu in NetSuite reveals Setup & Configuration and File Browser choices

The first time you use the software, you will be prompted to login. Consult the email you received from sales@techfino.com(mailto:sales@techfino.com)

to retrieve your credentials, and enter them. Please check your spam filter if you don't see it in your inbox.

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(http://techfino.com/wp-content/uploads/2017/06/fig2.jpg)

Fig. 2 – Login screen

Upon login, you will see the File Purge Settings screen, where you can make your archive/purge selections.



(http://techfino.com/wp-content/uploads/2017/06/fig3.jpg)

Fig. 3 – File Purge Settings tab of Setup & Configuration screen

Choosing the Account Info tab will allow you to see your licensing information, and reset your password if needed.



(http://techfino.com/wp-content/uploads/2017/06/fig4.jpg)

Fig. 4 – Account Info tab of Setup & Configuration screen

The File Purge Settings screen is where you will setup a retention policy, select the types of files you wish to purge, flag any file or files that you wish to preserve in NetSuite, and find other customizable settings. Also, it is here where you will set a schedule for the purge process, which will also drive the file archive process. The purge process occurs daily or weekly, depending on your choice. (see Fig. 5).

File Purge Settings

Retention policies enable your organization to control which files are retained and how long files are retained inside the NetSuite File Cabinet. CleanSweep automatically copies all files in the File Cabinet to the Techfino Cloud Archive once per day. Use the following options to configure the criteria for purging files from the NetSuite File Cabinet after they are safely archived.

WARNING: Improperly configured purge settings can cause the immediate and irreversible purging of files from your NetSuite Account. Use caution when creating or changing purge settings. We recommend that you test new rules in a sandbox before applying them to your entire organization in Production.

Retention Policy

Configure how long to retain files in the NetSuite File Cabinet before they are purged.

Do Not Retain - Purge All Files

File Types To Purge

Configure which file types to purge.

BMP Image ×

File Size

Configure purge of files larger or smaller than a specified size.

- Purge files regardless of size.
- Purge only files larger than a specified size.

Purge only files small	ller than:
20	KBs

Purge only files smaller than a specified size.

Select Specific Files To Preserve

Keep the following files inside NetSuite indefinitely. Click here to add/remove files from this list.

-- No Files Selected To Preserve --

Purge Schedule

When would you want the purge process to run?

v

Daily Overlaphic Deckly

2:00 pm

(http://techfino.com/wp-content/uploads/2017/06/fig5.jpg)

Fig. 5 – File Purge Settings

PURGE ENABLED

File Purge Settings

Retention policies enable your organization to control which files are retained and how long files are retained inside the NetSuite File Cabinet. CleanSweep automatically copies all files in the File Cabinet to the Techfino Cloud Archive once per day. Use the following options to configure the criteria for purging files from the NetSuite File Cabinet after they are safely archived.

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Retention Policy

Configure how long to retain files in the NetSuite File Cabinet before they are purged.

Do Not Retain - Purge All Files	-			
Do Not Retain - Purge All Files				
Retain 1 Year, Using Create Date Retain 1 Year, Using Modified Date Retain 2 Years, Using Create Date Retain 2 Years, Using Modified Date Retain 3 Years, Using Create Date Retain 3 Years, Using Modified Date Retain 4 Years, Using Create Date Retain 4 Years, Using Modified Date Retain 5 Years, Using Create Date	31	n a specif	fied size. Purge only files	smaller than:
Retain 5 Years, Using Modified Date				
Retain 6 Years, Using Create Date	14	ze.	20	KBs
Retain 6 Years, Using Modified Date	5	size.		
Retain 7 Years, Using Create Date Retain 7 Years, Using Modified Date				

Keep the following files inside NetSuite indefinitely. Click here to add/remove files from this list.

-- No Files Selected To Preserve --

Purge Schedule

When would you want the purge process to run? Weekly

Daily

(http://techfino.com/wp-content/uploads/2017/06/fig6.jpg)

Fig. 6 – Retention Policy choices

On the File Purge Settings tab, you will see a variety of Retention Policy choices. Please make your selections carefully, as once files are purged, they cannot be retrieved.

PURGE ENABLED

NetSuite Account. Use caution w		e immediate and irreversible purging of files from your ttings. We recommend that you test new rules in a tion.
Retention Policy		
Configure how long to retain	files in the NetSuite File Cabine	net before they are purged.
Do Not Retain - Purge All	I Files 🔻	
Configure which file types to	, purge.	
All Files		·
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All Files AutoCad BMP Image CFF File		and a second
All Files AutoCad BMP Image CFF File Compressed Tar File		s smaller than:
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(http://techfino.com/wp-content/uploads/2017/06/fig7a.jpg)

Cancel

Save

Fig. 7a – File types to purge

The File Types to Purge dropdown allows you to select any combination of file types, including All Files.

Excel File Purge Schedule

Daily

2:00 pm

When would you want the purge process to run?

Weekly

v

Retention Policy Configure how long to retain files in the NetSuite File Cabinet before th Do Not Retain - Purge All Files	ney are purged.
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EOT File	
Excel File	
2:00 pm 🔻	
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Fig. 7b – File types to purge

You can also specify purge settings by file size.

10/15

File Size

Configure purge of files larger or smaller than a specified size.

- Purge files regardless of size.
- Purge only files larger than a specified size.
- Purge only files smaller than a specified size.

Select Specific Files To Preserve

Keep the following files inside NetSuite indefinitely. Click here to add/remove files from this list.

-- No Files Selected To Preserve --

Purge Schedule

When would you want the purge process to run?

Daily	Weekly
2:00 pm	•

Cancel

KBs

el Save

(http://techfino.com/wp-content/uploads/2017/06/fig8.jpg)

20

Purge only files larger than:



Choosing the File Browser selection in the CleanSweep menu will launch the File Browser window. Until an archive has run, there will be no files to display.



Fig. 9 - File Browser - no files to display

Once an archive has been run, the File Browser screen will show the folders and files structure of your archive. This file/folder layout will mimic exactly what the layout was in NetSuite, providing a seamless transition to your files stored in CleanSweep File Manager.



(http://techfino.com/wp-content/uploads/2017/06/fig10.jpg)

Fig. 10 – File Browser screen.

Selecting a file in the File Browser will launch a popup window with file metadata, and a button to download the file. Depending on your browser settings, the Download File button will either open the file in a new tab, or simply download it to your browser's default download folder. Please note that certain file types may not open and may issue a warning, depending on your browser's security settings.

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(http://techfino.com/wp-content/uploads/2017/06/fig11.jpg)

Fig. 11 – Inventory Item with CleanSweep Archived Files and the links to those files.

If a file attached to an entry in NetSuite was archived, a link to the CleanSweep archived version of the file appears. Choosing the "CleanSweep" menu will show the file names, and a download link to these files.

Clicking on the "Download" link will launch the archived version of the file.



(http://techfino.com/wp-content/uploads/2017/06/fig12.jpg)

Fig. 12 – Clicking on the download link will load the link from the secure CleanSweep Archive.

Clicking on the download link will load the file from the secure CleanSweep archive (see Fig. 12). The user is able to print, or locally save, that file. Upon closing the file, the user can close the browser window by clicking the "Close Window" button (see Fig. 13).



(http://techfino.com/wp-content/uploads/2017/06/fig13.jpg)

Fig. 13 – Clicking on the "Close Window" button will close the download window.

2. FAQ

- Is CleanSweep File Manager secure?
 - **ANSWER:** All CleanSweep File Manager passwords are encrypted at rest. All CleanSweep files are accessed securely. When the download file button is clicked, the system issues a secure link to the file with a signature that must be matched by the browser, or else access fails. This link only remains intact for a few minutes and is only viable for that browser on that machine
- If someone sees the URL of one of my files stored, can they simply type it in and access it? **ANSWER:** All File Manager files are accessed securely. When the download file button is clicked, the system issues a secure link to the file with a signature that must be matched by the browser, or else access fails. This link only remains intact for a few minutes and it is only viable for that browser on that machine.
- How long does it take to archive the contents of my file cabinet? **ANSWER:** The first archive can take up to several hours depending on the amount of data stored in your sandbox. Subsequent archive updates are much faster as only new or updated files since the previous day are updated.
- How often does the file purge and archive occur?
 ANSWER: Archive runs once daily and you choose the day and time when the purge runs on the Setup screen. The archive runs at the same time as the purge. You can purge files once per day or once per week.
- Can I access my files outside of NetSuite?

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ANSWER: No, you cannot currently access your files outside of NetSuite. This will change in a future version of CleanSweep File Manager.

Does File Manager provide visibility of relative documents from a NS record as well, similar to how the NS File Cabinet shows related files on the Communication tab?
 ANSWER: Yes, a CleanSweep tab is visible on all transactions and standard records to list the files stored in CleanSweep File Manager.