Send Files and Manage Send Job

Job view

- Select recipient
- Select files
- Select file processing (option for SWANenterprise)
- Send files
- Manage send job

This short manual briefly describes how to select data recipients and files for sending, send the files and how to retrieve information about your send job.

Detailed information is available in the user manual by clicking on the *Help* link of the *Extras-Menu*.

Please contact the relevant support unit, if you need further support.

The contact details can be found on the SWAN login page.

Launch SWAN

- Start the Internet browser.
- Enter the SWAN URL into the address line of the browser.
    - ⇨ The SWAN login page is displayed.
- Login with your User ID and password.
   - ⇨ The preset view appears.
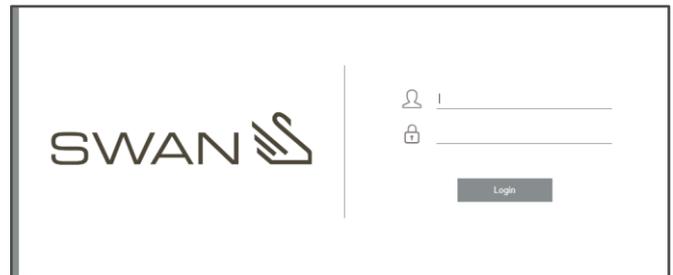
In the ⬓ *Job* view you can, depending on your SWAN version:

- select a data recipient *To* and select files ⊞ *Add file*
- inform persons that the data has been sent in an email with a data delivery note *CC email*
- enter a client when creating a job if you are sending data on behalf of another person
- as a project member, select whether you want to send a job in your name or on behalf of a project *From*
- choose processing options for the data
- select a send time
- manage entries in your personal address books ⧒ for data recipients an CC email recipients
- select recipients from the address books
- create and select templates ⧉ for recurring send jobs
- show and hide additional input areas, e.g. to select processes for data preparation ⚙
- send job ⬓ *Send*

Enter Certificate Key Password

- Activate the ⬅️ *Job* view
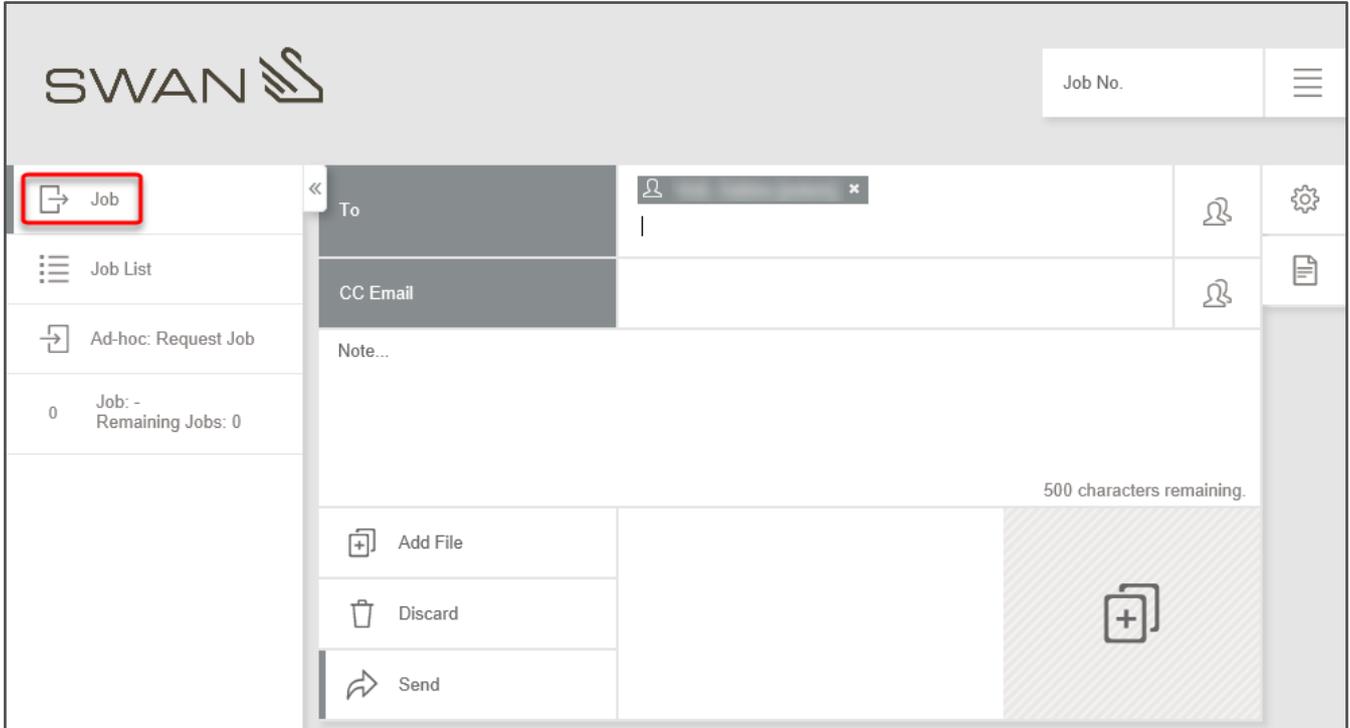
Select data recipient

There are several ways of selecting recipients:

- Quick selection (Last 15 recipients) by clicking in the recipient field *To* and selection of the desired recipient
- Quick search by entering a search string (at least 3 letters) in the recipient field *To* (first name, last name, department or company)
- Select an entry in your personal address book 🧑
- Search function in address book

**Example**: Search function in address book

You can use the search function in the address book and save the result in the personal address book..

- Click 🧑.
    - ⇨ A list of entries in your address book will appear..

You can use the search function and combine search criteria.

- Select a search criterion under ▼ (name, company, department, site, ,....) and fill in the search field. To add additional filters, click again ▼.
- Click *Search* or confirm with [ENTER].
    - ⇨ A list with search result appears.
- Select the required recipient. The selected recipient is highlighted with a coloured background.

- Click *Select*.
  - ⇨ The selected recipient will appear in the job form in the field *To*
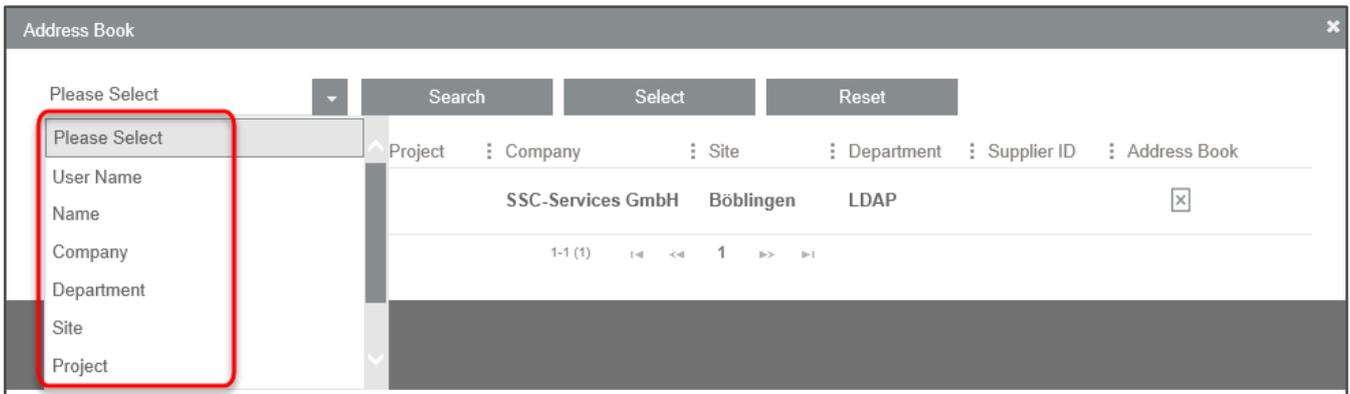

Select send options - Processes

Depending on the processes supported in your SWAN version, you can choose various processing options for your data. Using the ⚙ symbol, you can adapt the job form to your needs and show and hide additional input areas, e.g. to select processes for data preparation.

- Select the required process step.
  - ⇨ The selection will be taken over.
  - ⇨ You can then select further process steps.
  - ⇨ However, the selection option is limited to the remaining possible options.

Select files

Add file from file system

- Click *Add file* ⊞.
  - ⇨ The selection window *File to upload* will appear.
- Select:
  - − An individual file by double clicking it or by clicking it and then on *Open*.
  - ⇨ The file is added to the selection window.
  - − Multiple files by clicking CTRL/SHIFT and clicking *Open.*
  - ⇨ The files are added to the selection window.
- Add further files if required.
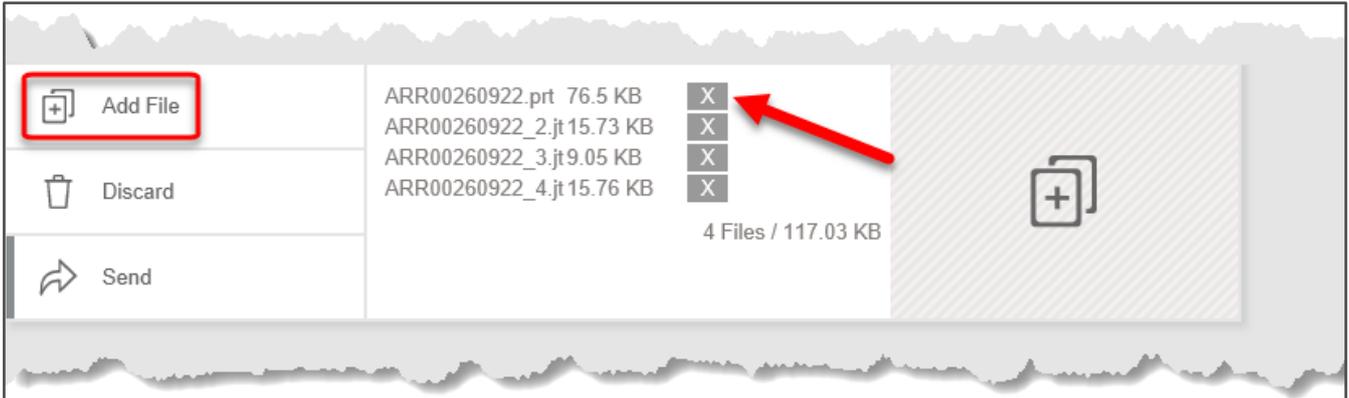
With the aid of *Remove* at the end of the line, you can individually delete files from the job list.

**Add file via drag & drop**

You can also add files from an open Explorer window by pulling them into the selection window

to the drag & drop area.

- Open Windows Explorer and navigate to the desired files.
- Pull the individual file or several selected files to the hatched drag & drop area ⊞.
    - ⇨ The files are added to the selection window.
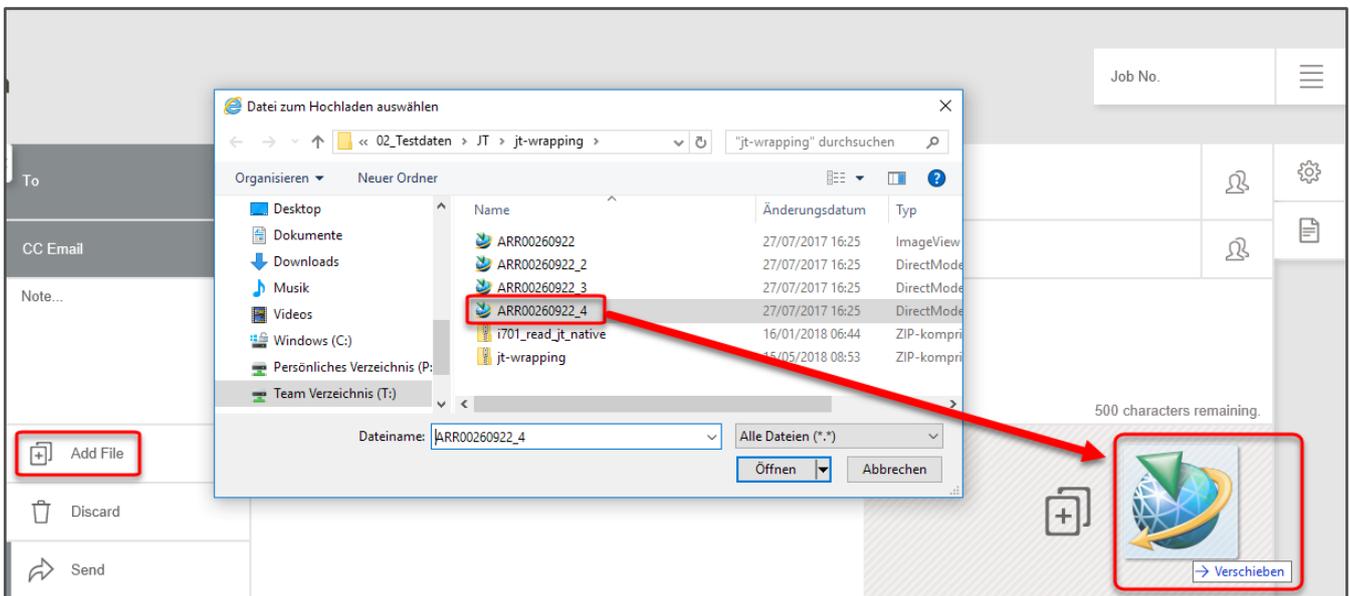
Send files and manage send job

- Click **Send** ⤷.
    - ⇨ The job is processed and the files are sent.
    - ⇨ The **job list** view then appears.
    - ⇨ Details on the upload process can be found in the information area in the main menu:
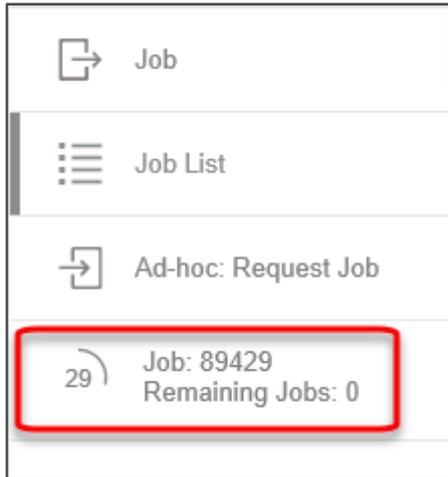
- ⇨ Information on the job (**Content, History, Contact data**) and possible functions (**Forward, Download, Refresh, Visualize**,....) will appear on the right after you have selected the job by clicking it.
- ⇨ The selected job is highlighted in colour.