



**Centers for Medicare & Medicaid Services**

**FileCloud**

# **Web Browser User Guide**

---

**Version 1.1**

**11/25/2019**



**Document Number:** HIDS-000-056

**Contract Number:** HHSM-500-2015-00252C

## Table of Contents

<b>1. User Access .....</b>	<b>1</b>
1.1 Pre-requisites.....	1
<b>2. Accessing FileCloud from Web Browser .....</b>	<b>2</b>
<b>3. Creating Folders .....</b>	<b>4</b>
<b>4. Uploading Files .....</b>	<b>8</b>
4.1 Drag and Drop from Windows Explorer .....	8
4.2 Via the Upload Button .....	9
<b>5. Other FileCloud Tasks.....</b>	<b>12</b>
5.1 Move File .....	12
5.2 Copy File.....	13
5.3 Delete File.....	15
<b>6. Dashboard Navigation.....</b>	<b>17</b>
<b>Appendix A: Record of Changes .....</b>	<b>18</b>
<b>Appendix B: Acronyms.....</b>	<b>19</b>

## List of Figures

Figure 1: FileCloud Login Page .....	2
Figure 2: FileCloud Main Dashboard.....	3
Figure 3: Main Dashboard – My Files and Team Folders.....	4
Figure 4: My Files Workspace .....	5
Figure 5: Contract Name Folder Workspace .....	5
Figure 6: Folder Actions Drop-down List .....	6
Figure 7: New Folder Window .....	6
Figure 8: Newly Created Subfolder .....	7
Figure 9: New Folder Workspace .....	7
Figure 10: Upload Queue Progress Window .....	8

Figure 11: Team Folder with Newly Uploaded File.....	9
Figure 12: Upload Button .....	9
Figure 13: Open Window.....	10
Figure 14: Upload Queue Progress Window .....	10
Figure 15: My Files Folder with Newly Uploaded File.....	11
Figure 16: More File / Folder Drop-Down Options.....	12
Figure 17: Move Files Window - Folder Selection .....	13
Figure 18: Move Files Progress Message .....	13
Figure 19: Copy Files Window - Folder Selection .....	14
Figure 20: Copy Window when Source and Destination Folders are the Same .....	14
Figure 21: Confirmation Message for Overwriting Existing File.....	15
Figure 22: Copy Files Progress Message .....	15
Figure 23: Confirm Delete Message.....	15
Figure 24: Delete Files Progress Message .....	16
Figure 25: FileCloud Help & Support Selection .....	17

## List of Tables

Table 1: Record of Changes .....	18
Table 2: Acronyms .....	19

# 1. User Access

---

Follow the steps in this section to gain access to FileCloud (FC).

## 1.1 Pre-requisites

Before you can gain FileCloud access, you must have a HCQIS Access Roles & Profile (HARP) ID. Follow the steps in this section for obtaining a HARP ID and providing it to your contract Security Officer (SO).

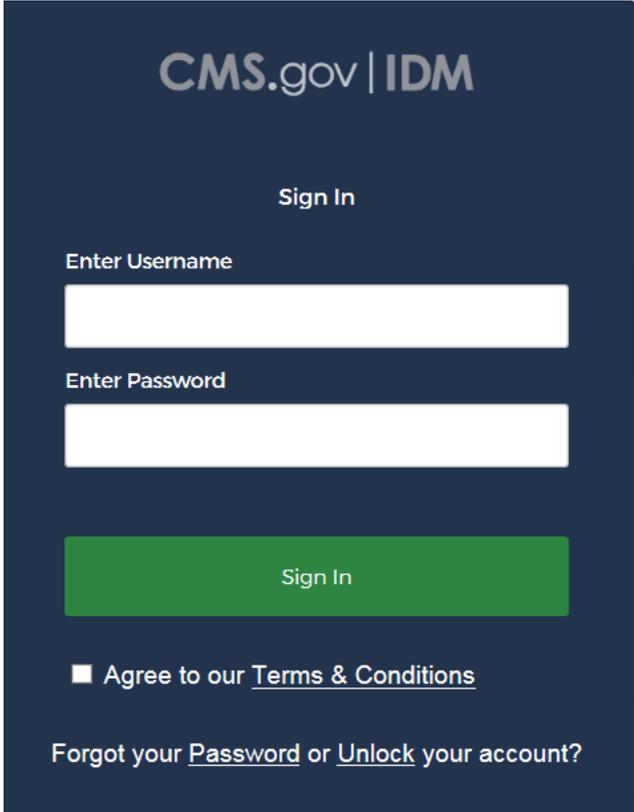
1. Register for a HARP ID. Below is the registration link as well as the link to video instructions. Please use your **corporate email address** in the Email Address field. If you already have a HARP ID, skip to step 2.
  - a. Create your account using the following web site:  
<https://harp.qualitynet.org/register/>
  - b. The following video provides instructions on creating your account:  
<https://www.youtube.com/watch?v=G1zj8JqxWg4>
2. Forward your HARP ID to your assigned contract Security Officer (SO).
  - The SO will provide your HARP ID to HCQIS Infrastructure and Data Center Support (HIDS) who will provide you with access to the FileCloud web application.
3. Once you are given access to the FileCloud web application, log in to the application with your HARP ID credentials using the FileCloud URL: <https://filecloud.hcqis.org>
  - See [Section 2 – Accessing FileCloud from Web Browser](#) for more detailed steps. Once you successfully log in to the application, you will see the My Files folder (but not your team folder at this point).
4. Inform your SO that you have successfully logged in to the FileCloud. They will let you know when you will be provided with access to the Team Folder (HIDS will grant you access and inform the SO).
5. You may begin using FileCloud.

## 2. Accessing FileCloud from Web Browser

---

Use the following steps to access FileCloud.

1. From your computer, you may use any of the following web browsers:
  - Google Chrome
  - Mozilla Firefox
  - Apple Safari
  - Microsoft Internet Explorer
  - Microsoft Edge
2. Access the FileCloud Login page using the following web address:  
<https://filecloud.hcgis.org>



The image shows a login page for CMS.gov | IDM. The page is dark blue with white text. At the top, it says "CMS.gov | IDM". Below that is the text "Sign In". There are two white input fields: "Enter Username" and "Enter Password". Below the password field is a green "Sign In" button. At the bottom, there is a checkbox labeled "Agree to our Terms & Conditions" and a link for "Forgot your Password or Unlock your account?".

Figure 1: FileCloud Login Page

3. In the Enter Username field, enter your HARP ID.
4. In the Enter Password field, enter your HARP password.
5. Put a checkmark in the box for “Agree to our Terms & Conditions.”
6. Click the **Sign In** button.

- Upon a successful login, you will be redirected to FileCloud’s main dashboard page (Figure 2). From the dashboard, you will be able to navigate to both your personal space and your team folders.

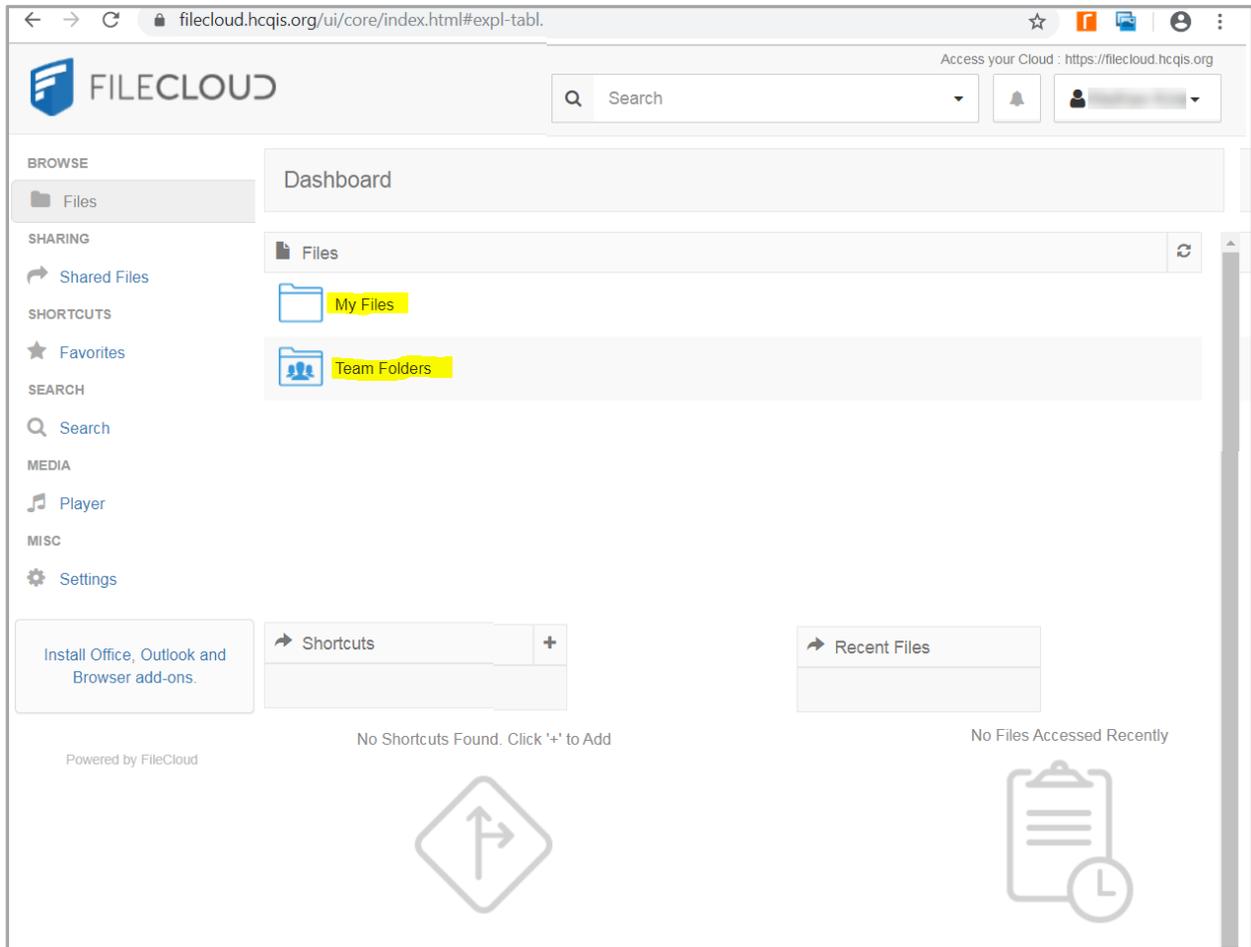


Figure 2: FileCloud Main Dashboard

### 3. Creating Folders

You can create subfolders within both My Files and Team Folders—see Figure 3.

**NOTE:** You cannot create an additional folder on the Dashboard.

1. After you log in to FileCloud, you are at the main Dashboard. Click on either the **My Files** or **Team Folders** folder, or their links, to open the one where you want to create a subfolder.

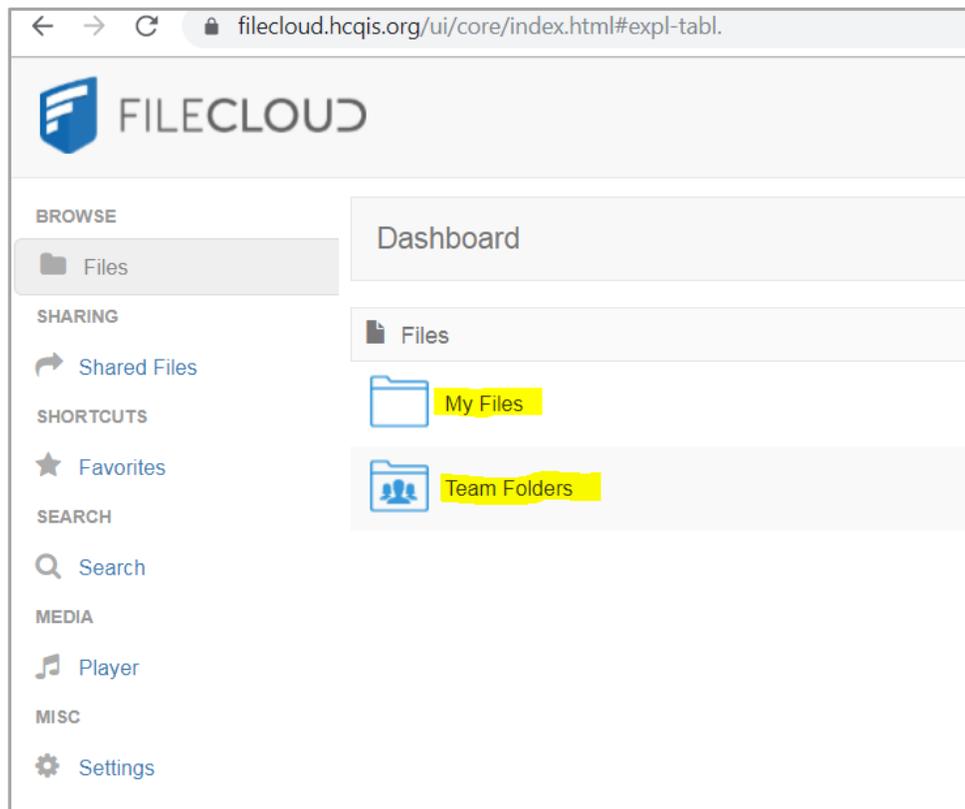


Figure 3: Main Dashboard – My Files and Team Folders

- a. Within the My Files folder, you will see the workspace where document files are stored—see Figure 4.

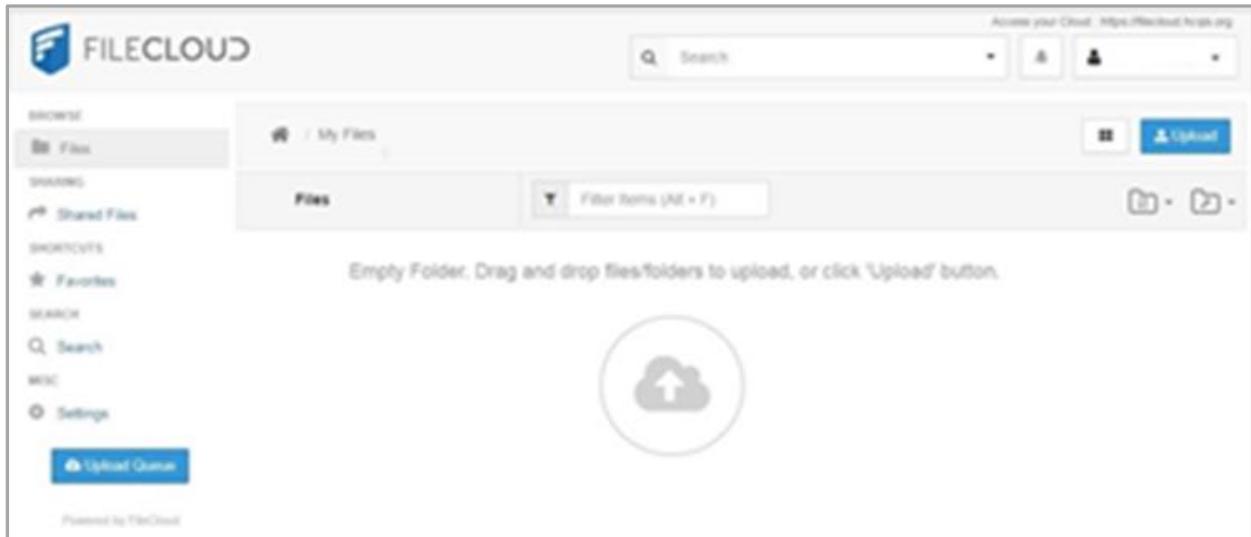


Figure 4: My Files Workspace

- b. Within the Team Folders folder, find your Contract Name Folder and click your Contract Name folder, or its associated link, see Figure 5. You will see the workspace where document files are stored.

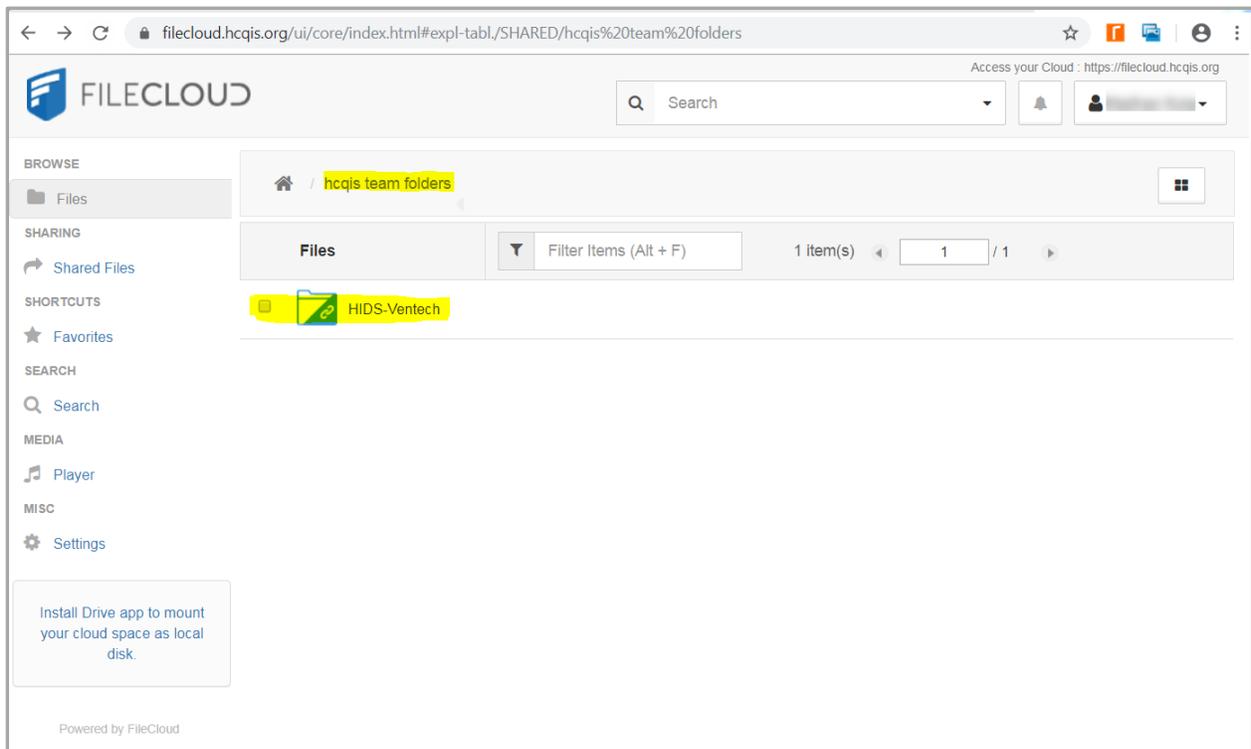
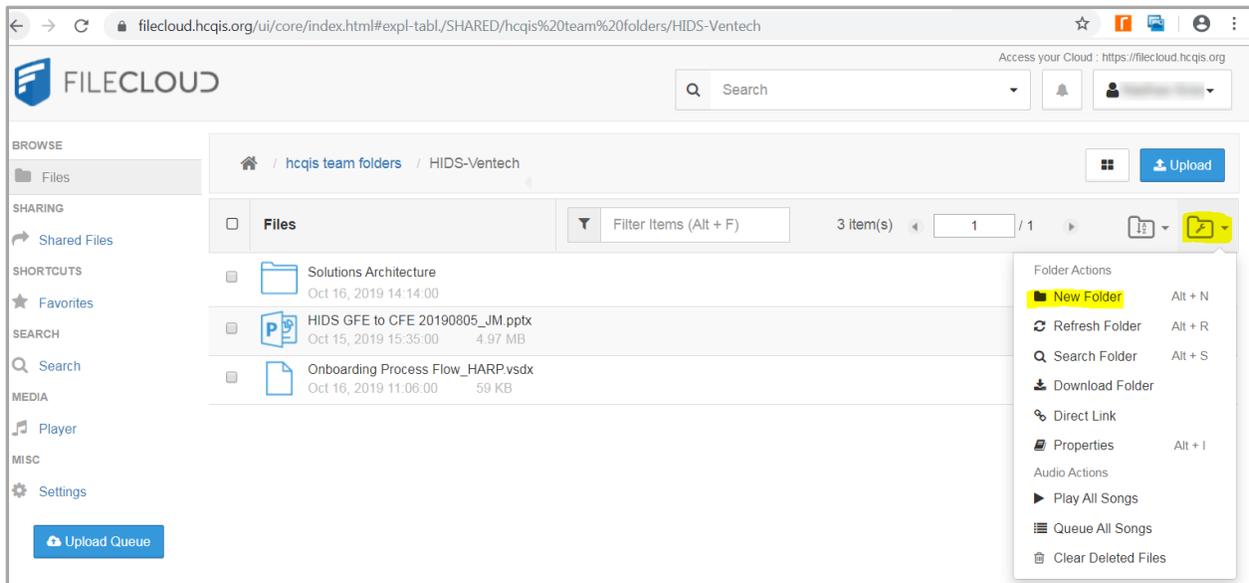


Figure 5: Contract Name Folder Workspace

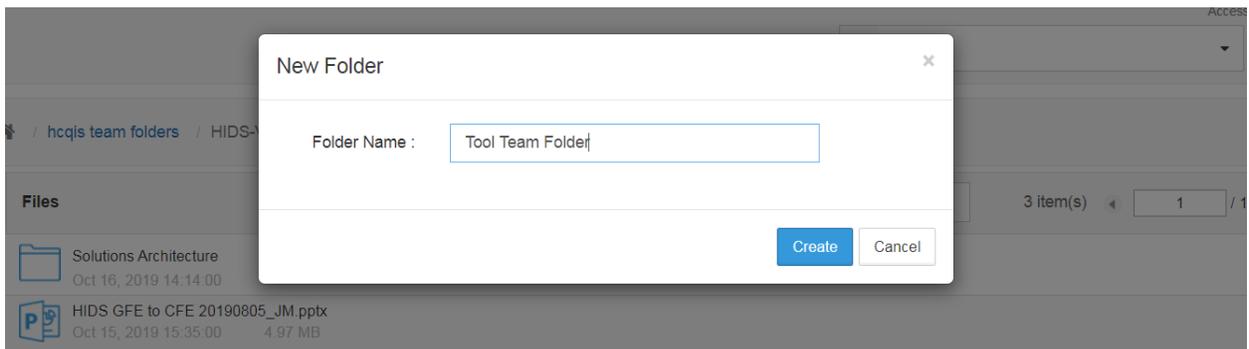
- In the upper right corner, click the **Folders Action** icon  to open the Folder Actions drop-down list.



**Figure 6: Folder Actions Drop-down List**

- Click **New Folder** in the drop-down list. The New Folder window displays (see Figure 7).

**NOTE:** You can also create new folders by right-clicking in the workspace and selecting New Folder from the drop-down menu.



**Figure 7: New Folder Window**

- In the Folder Name field, enter the preferred name for the new folder then click the **Create** button (see Figure 7).

- The new subfolder displays within your folder—see Figure 8.

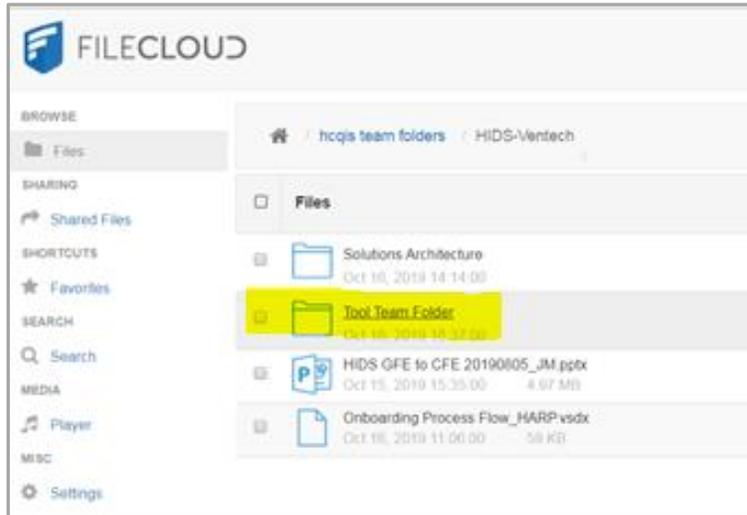


Figure 8: Newly Created Subfolder

- Click your new folder or its link. The folder workspace displays (Figure 9). You may begin uploading files to your new folder according to the directions in the next section.

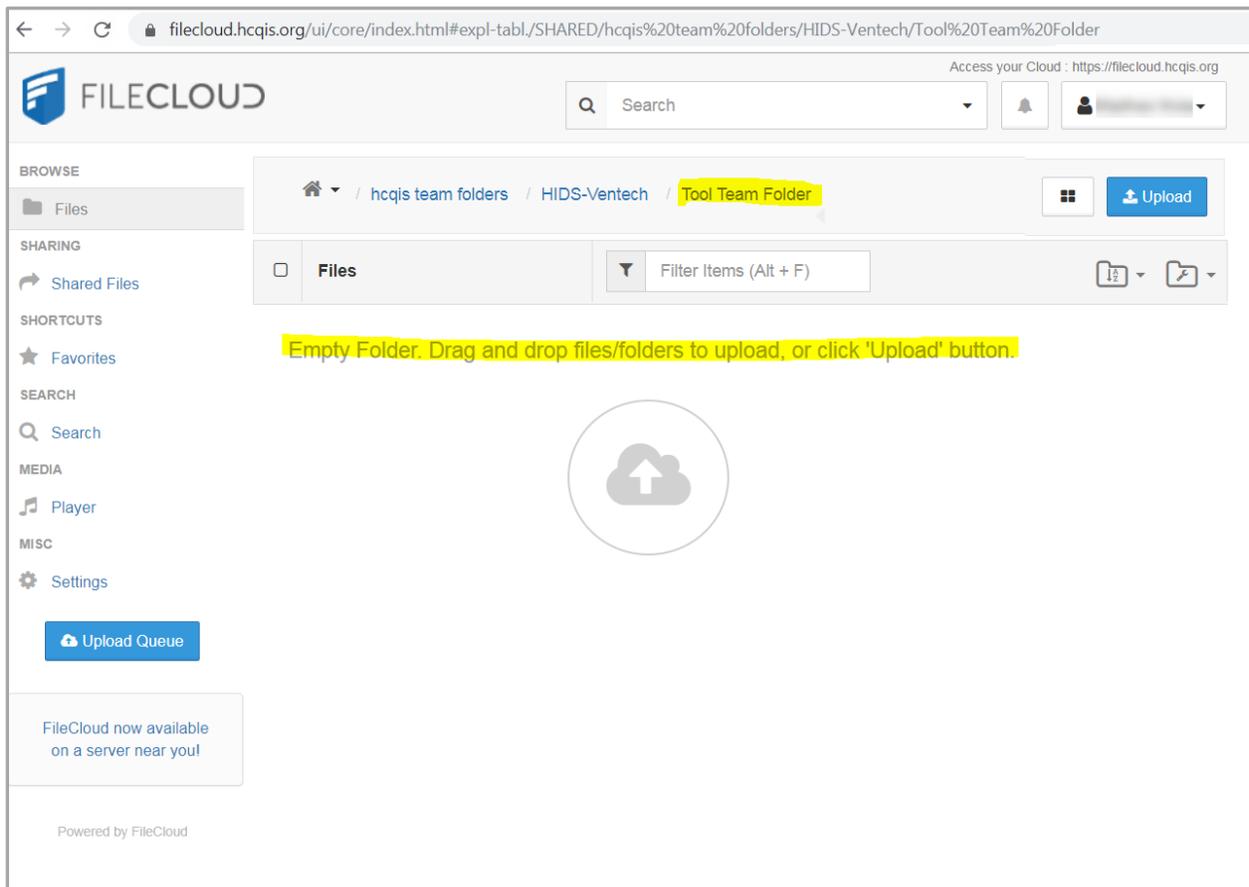


Figure 9: New Folder Workspace

## 4. Uploading Files

FileCloud allows you to upload files to a folder two ways:

- Drag and drop from Windows Explorer
- Via the Upload button

### 4.1 Drag and Drop from Windows Explorer

To drag and drop your file(s) into a FileCloud folder, perform the following steps.

1. Make sure FileCloud is opened at the workspace for the folder where you want to upload the file.
2. Open Windows Explorer and locate the folder where your file resides.
3. Click on the file in Windows Explorer and drag it to the FileCloud folder.
4. The Upload Queue window displays—see Figure 10.

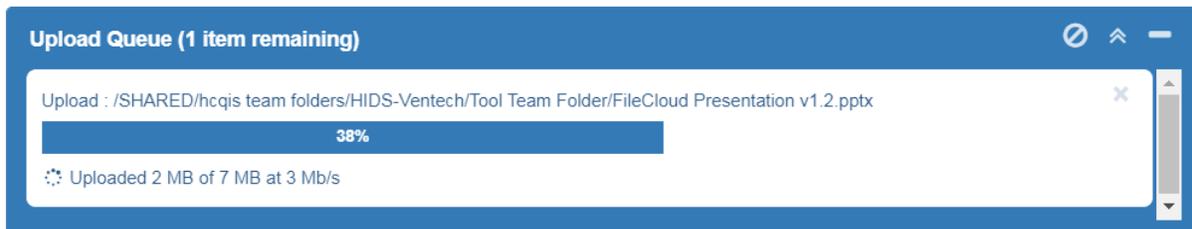


Figure 10: Upload Queue Progress Window

5. Once the Upload Queue window reaches 100%, it closes automatically and your file displays in the FileCloud folder—see Figure 11.

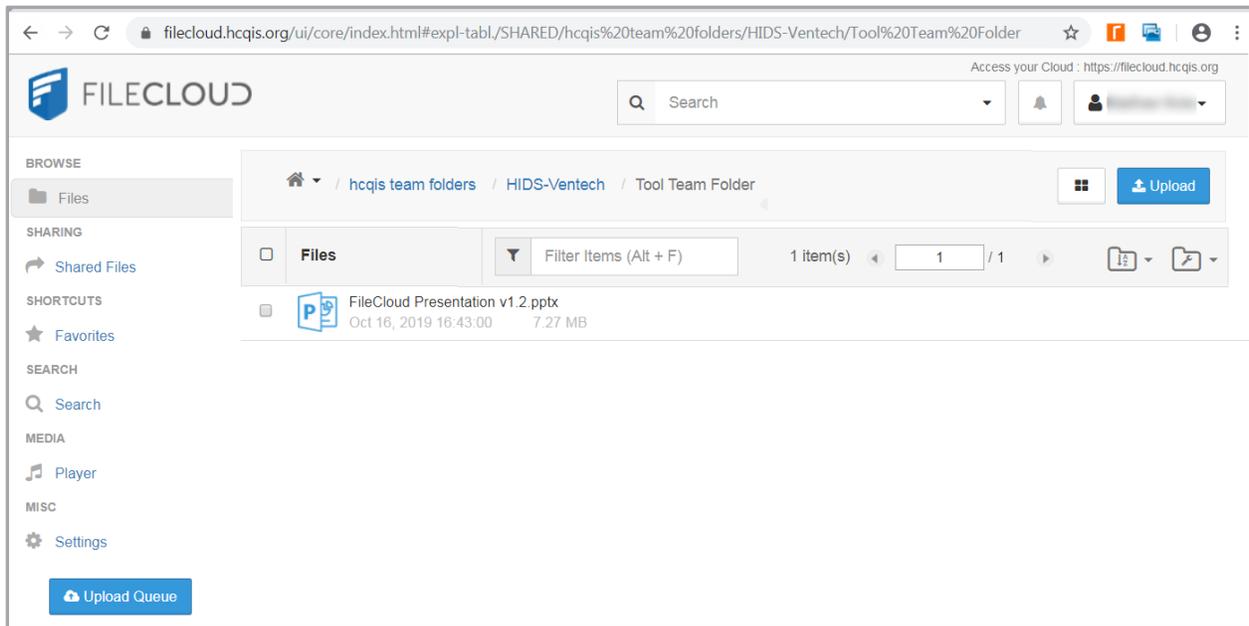


Figure 11: Team Folder with Newly Uploaded File

## 4.2 Via the Upload Button

If you want to use the Upload button to upload files, follow these steps.

1. Click the **Upload** button on the upper right side of the screen.

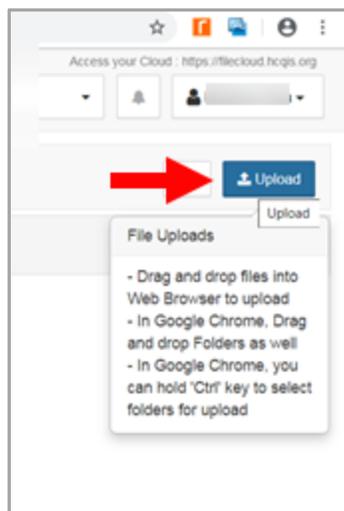


Figure 12: Upload Button

2. This opens a Windows Explorer window where you can choose the file you want to upload.

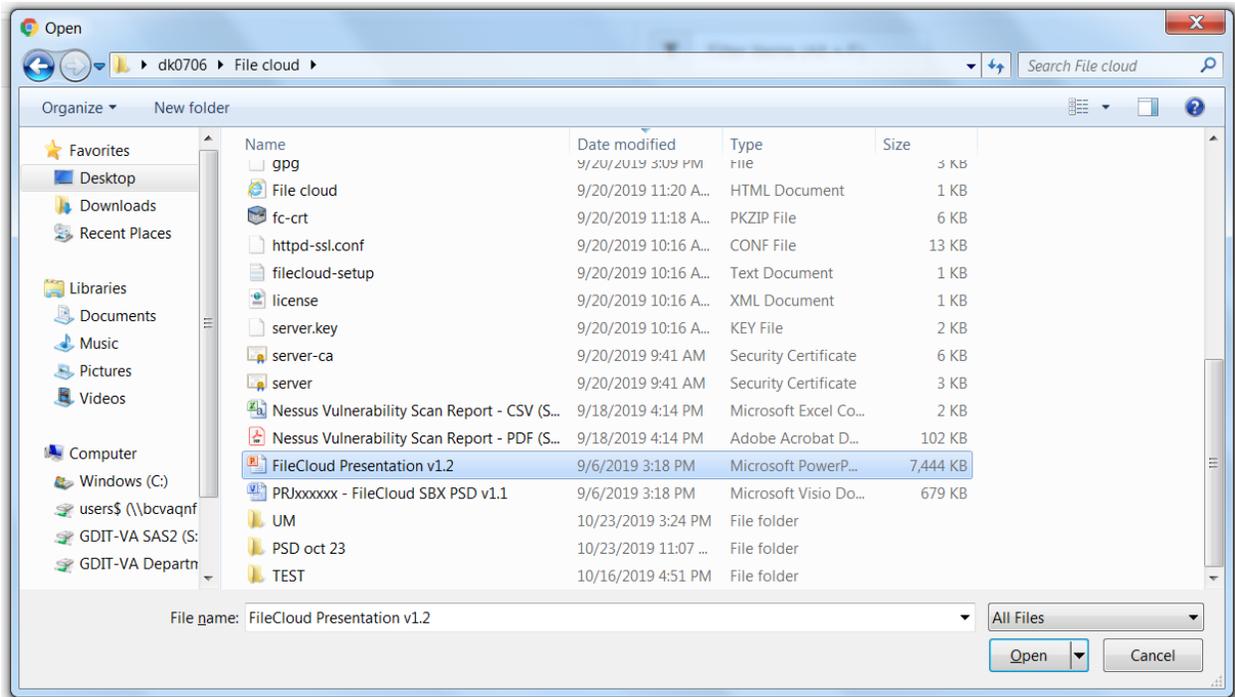


Figure 13: Open Window

3. Highlight the file you want to upload and click the **Open** button in the lower right.
4. The Upload Queue window displays to show the upload progress for the file.



Figure 14: Upload Queue Progress Window

5. Once the Upload Queue window reaches 100%, it closes automatically and your file displays in the FileCloud folder.

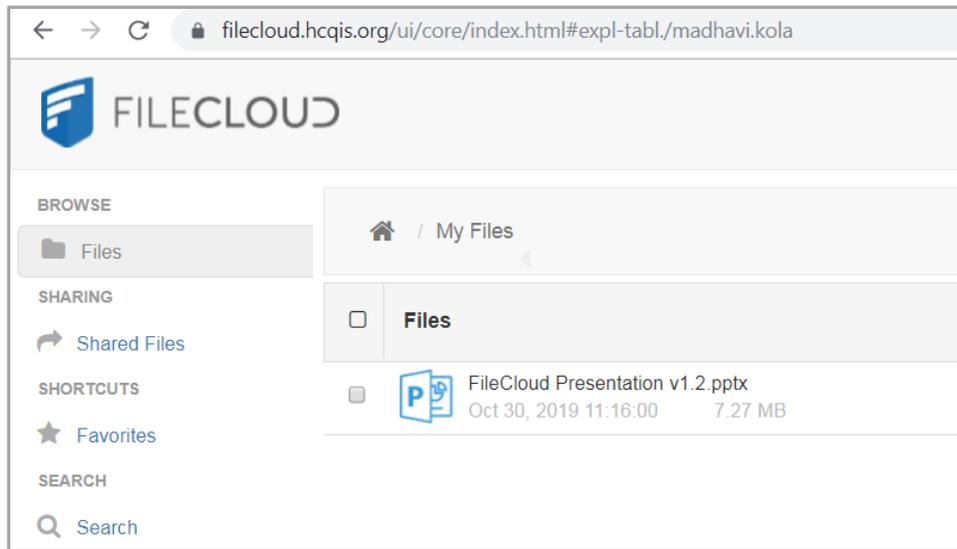


Figure 15: My Files Folder with Newly Uploaded File

## 5. Other FileCloud Tasks

To Move, Copy, or Delete a folder or file, perform the following steps.

1. Click the file or folder that you wish to move, copy, or delete. The file/folder is highlighted after you click on it.
2. Click the **More** drop-down above the file or folder, and the File Options drop-down menu displays-see Figure 16.

NOTE: You can also display the File Options drop-down menu by right-clicking on the file/folder.

3. Select **Move**, **Copy**, or **Delete** from the File Options drop-down menu.

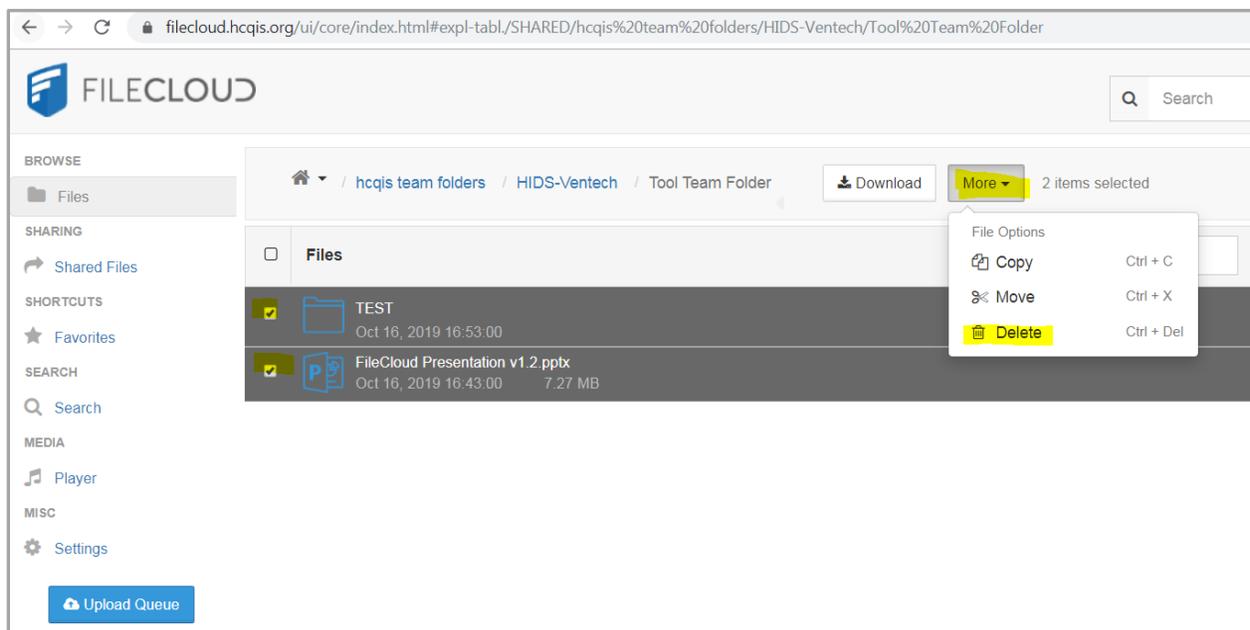


Figure 16: More File / Folder Drop-Down Options

For the remaining steps, follow the appropriate subsection depending on whether you are moving, copying, or deleting a file.

### 5.1 Move File

To move a file from one location to another, do as follows.

1. When you choose the **Move** selection from the File Options drop-down, the following window appears.

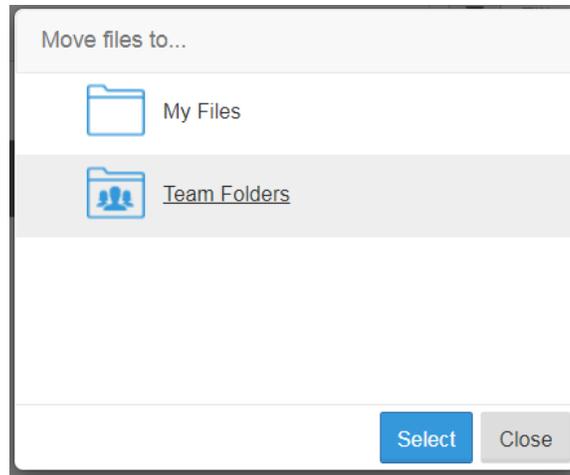


Figure 17: Move Files Window - Folder Selection

2. Highlight the folder to which you want to move the file. This is the destination folder.
3. Click the **Select** button.
4. A message displays showing you the progress.

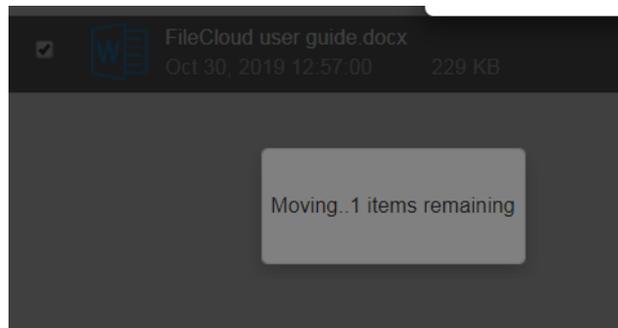


Figure 18: Move Files Progress Message

5. When the move is complete, the message clears. The file is removed from the source folder and appears in the destination folder.

## 5.2 Copy File

To copy a file from one location to another, follow these procedures.

1. When you choose the **Copy** selection from the File Options drop-down, the following window appears.

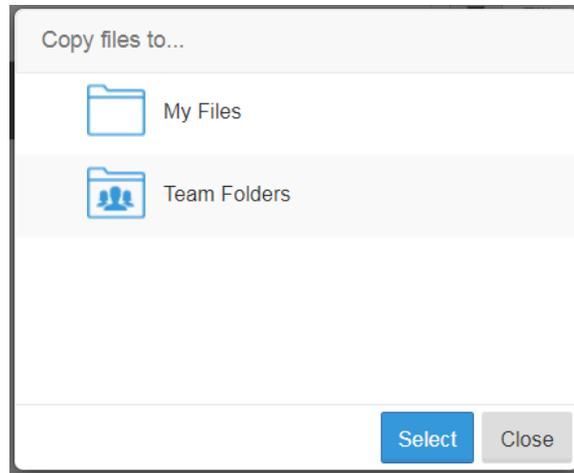


Figure 19: Copy Files Window - Folder Selection

2. Highlight the folder to which you want to move the file. This is the destination folder.
3. Click the **Select** button. The next window appears.
  - a. If the source and destination folders are different, the copy begins. Go to step 4.
  - b. If the source and destination folders are the same, the following window appears.

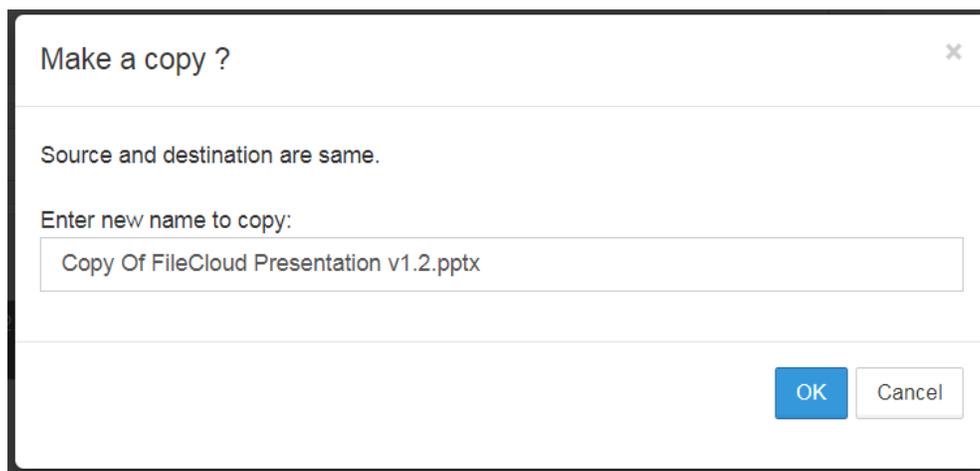


Figure 20: Copy Window when Source and Destination Folders are the Same

You have the choice of keeping the same file name or changing it by making a new entry in the “Enter new name to copy” box. Click **OK** to continue. If you changed the file name, the copy will begin — go to step 4. If you kept the same name, the following confirmation question displays letting you know you will be overwriting the existing file.

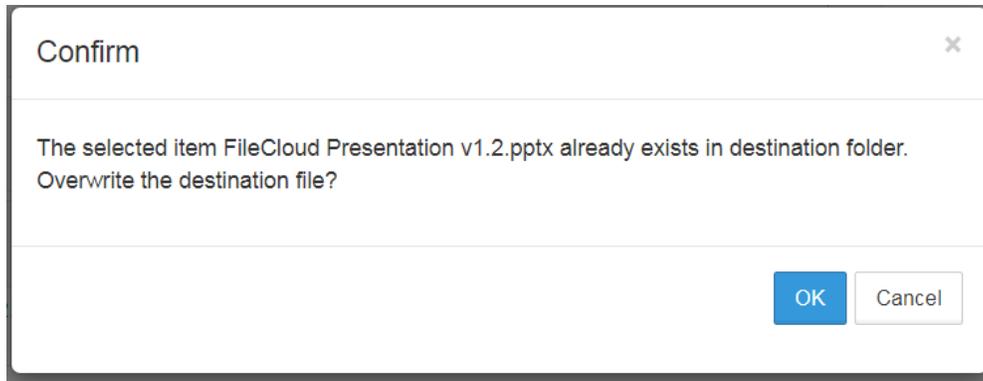


Figure 21: Confirmation Message for Overwriting Existing File

Click **OK** to start the copy— go to step 4.

4. When the copy starts, a message displays showing you the progress.

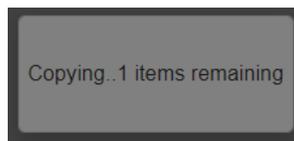


Figure 22: Copy Files Progress Message

5. When the copy is complete, the message clears. The file stays in the source folder and a copy appears in the destination folder.

## 5.3 Delete File

The following steps instruct you on deleting a file.

1. When you choose the **Delete** selection from the File Options drop-down, the following window appears.

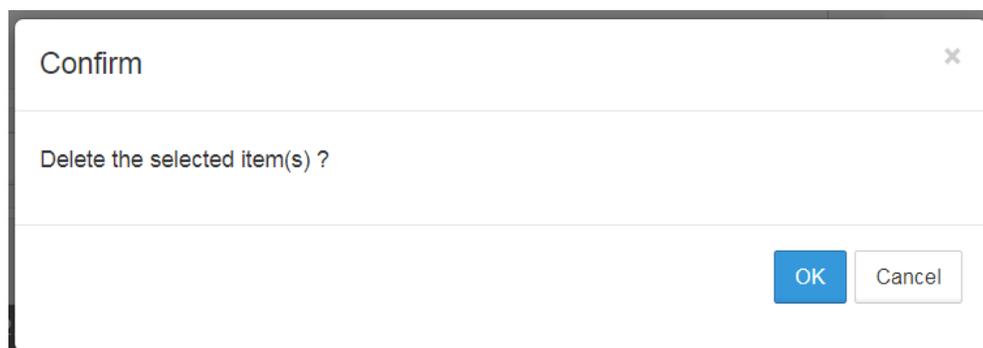
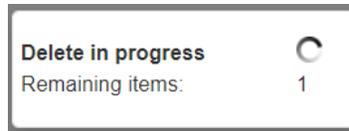


Figure 23: Confirm Delete Message

2. Click **OK** to confirm that you want to delete the file. The following window appears to show you the progress.



**Figure 24: Delete Files Progress Message**

When the process is complete, the message clears and the file is removed from the folder.

## 6. Dashboard Navigation

To learn more about dashboard navigation, use the following link to access the *FileCloud User Guide*:

<https://getfilecloud.com/supportdocs/display/cloud/FileCloud+Server+User+Guide>

To access FileCloud documentation within the FileCloud Web Application, perform the following steps.

1. In the upper right corner, select the button with your User Name. The FileCloud drop-down displays, see Figure 25.
2. Select **Help & Support** from the FileCloud drop-down list.
3. A new browser tab will open with the full list of FileCloud Support Documentation.



Figure 25: FileCloud Help & Support Selection

## Appendix A: Record of Changes

Table 1: Record of Changes

Version	Date	Author/Owner	Description of Change
1.0	10/30/2019	Ops-Tools Team	Initial version

## Appendix B: Acronyms

Table 2: Acronyms

Acronym	Definition
CMS	Centers for Medicare & Medicaid Services
FC	FileCloud
HARP	HCQIS Access Roles & Profile
HCQIS	Health Care Quality Information Systems
HIDS	HCQIS Infrastructure and Data Center Support
SO	Security Officer
URL	Uniform Resource Locator (web address)