

# Welcome to BOK Financial Secure File Transfer

## Log In Procedure

**Please note:** These instructions have been supplied to assist users in signing in the first time and uploading and downloading files to the BOKF Secure File Transfer Website. Please keep in mind that every computer environment is different from the Operating System to brand of Web Browser being used and this document supplies a basic set of instructions that should allow most first time users to perform the functions that they need to. **If you have questions please email** [transfer@bokf.com](mailto:transfer@bokf.com)



**BOK FINANCIAL**

○ Sign On

Username:

Password:


**Security Notice**  
You are about to access a secured resource.  
BOK Financial reserves the right to monitor  
and/or limit access to this resource at any time.

**Need Help?** [Tech Support](#) - [Online Manual](#)

**Forget your password?** [Request a password change](#)

- Type: <https://transfer.bokf.com> to access the website.
- Type: Username
- Type: Password (case sensitive)
- Click: Sign On button

- [Home](#)
- [Messages](#)
- Need Help?**
- [Online Manual](#)
- [Tech Support](#)


**WARNING! The Upload/Download Wizard did not load.**  
 [Click here to reinstall the Wizard from the Wizard Status page.](#)



 Home

**Browse Files and Folders...**

To **search for a particular file**, enter the file name or file ID in the Find File box on the left side of the page and press the "Find File" button.

 [Go To Your Home Folder](#) -  [Browse Other Folders](#)


**Upload a File Now...**

Select a folder:  

Pick a file with the "Browse" button:

Enter any applicable notes:


...and then press the "Upload" button:

**WARNING! The Upload/Download Wizard did not load.**  
 [Click here to reinstall the Wizard from the Wizard Status page.](#)



- Select: [Click here to install the Wizard from the Wizard Status page.](#)


- [Home](#)
- [Messages](#)
- Need Help?**
- [Online Manual](#)
- [Tech Support](#)

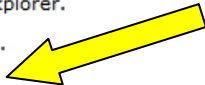
 Account Options (customer\_test\_account)

**ActiveX Upload/Download Wizard**

The "Upload/Download Wizard" allows you to upload/download files faster, upload/download multiple files at once, zip/unzip files on the fly and perform integrity checks to ensure file non-repudiation. The ActiveX Wizard requires Internet Explorer.

**The Upload/Download Wizard is NOT Installed.**

 [Click here to install the Upload/Download Wizard](#)

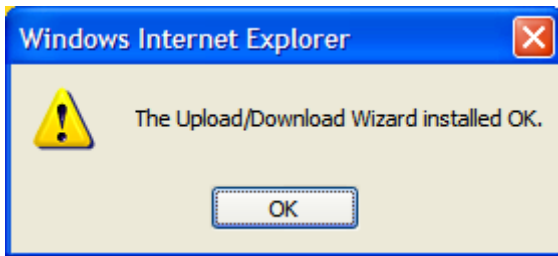


~ OR ~ Disable the Wizard: [Always](#) - [This Session Only](#)

Note: You will NOT be able to install the Wizard on some computers.

- You must have administrative privileges on your machine to install the Wizard. (Many users, especially home users, already enjoy these rights. Most 'public terminal' users, however, will not have these rights. Ask your IT department if you are unsure.)
- Internet Explorer must be configured to allow you to install SIGNED ActiveX controls. (This right has been the default for some time, but some recent versions of IE have been restricting this right to 'Trusted' or 'Intranet' sites only. If this is the case, please add this site to your list of 'Trusted' or 'Intranet' sites.)

- Click: [Click here to install the Upload/Download Wizard](#)
- **Note: If you have a **popup blocker** or **Internet Explorer** installed you may have to disable the popup blocker or follow the **Information Bar** instructions to complete this installation. Also you must have **Administrator Rights** on the computer or it will be unable to install.**
- **If you have problems please contact the BOKF Helpdesk at (918) 588-8600 and have a ticket opened and paged to a Transmission Services Technician and someone will call you back shortly.**



- Click: OK
- This **COMPLETES** the initial signon process.
- Subsequent signons from the same PC should not require the reinstallation of the applet, but will require you provide your username and password credentials to access the site.

# Welcome to BOK Financial Secure File Transfer

## Upload Procedure

**Please Note:** This document assumes that you have already performed an initial login to the Secure File Transfer Website, established your permanent password, and installed the [Upload/Download Wizard](#). Information on how to do this can be found in the [SFTW Initial Signon Procedures](#) document. If you need this document or need assistance please contact the BOKF Helpdesk at (918) 588-8600 and have a ticket opened to Transmission Services or email [transfer@bokf.com](mailto:transfer@bokf.com) and someone will contact you shortly to assist.

**BOK FINANCIAL**

**Sign On**

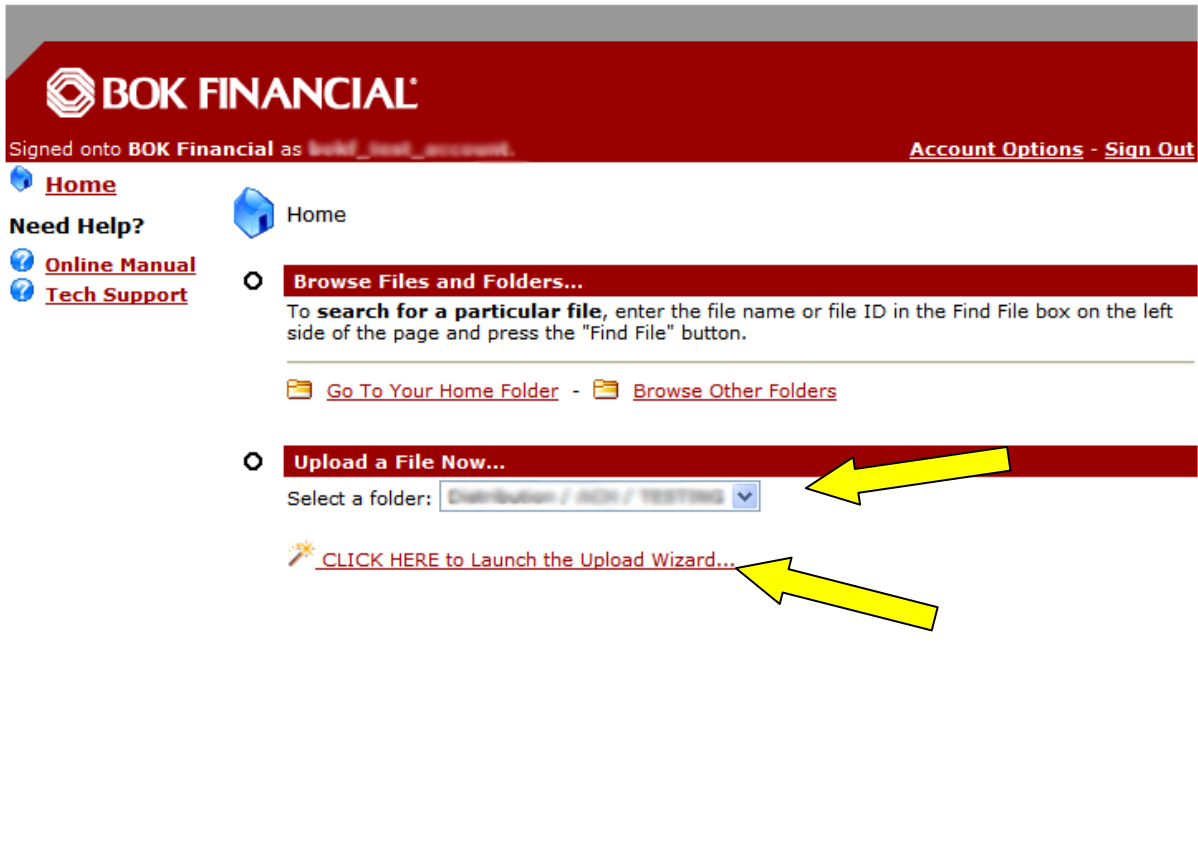
Username:  show

Password:  show

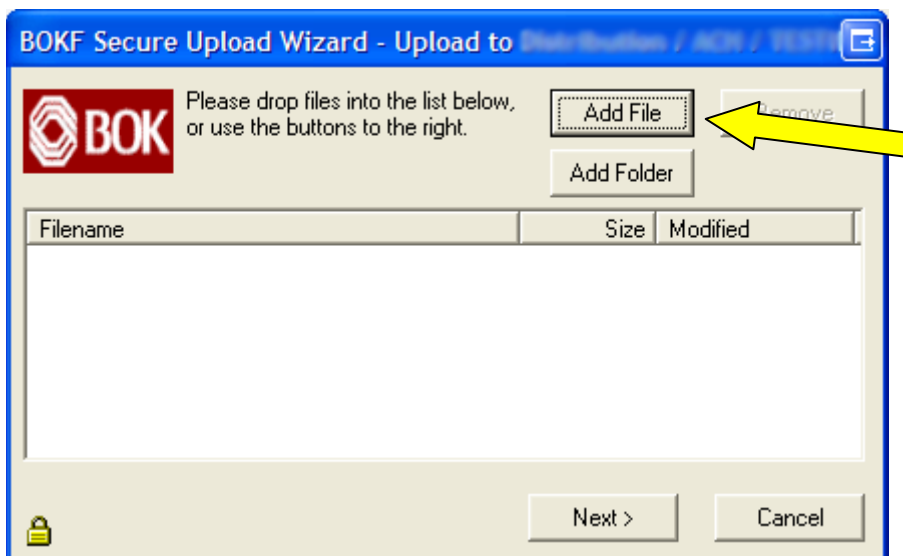
**Security Notice**  
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and/or limit access to this resource at any  
time.

Need Help? [Tech Support](#) - [Online Manual](#)  
Forgot your password? [Request a password change](#)

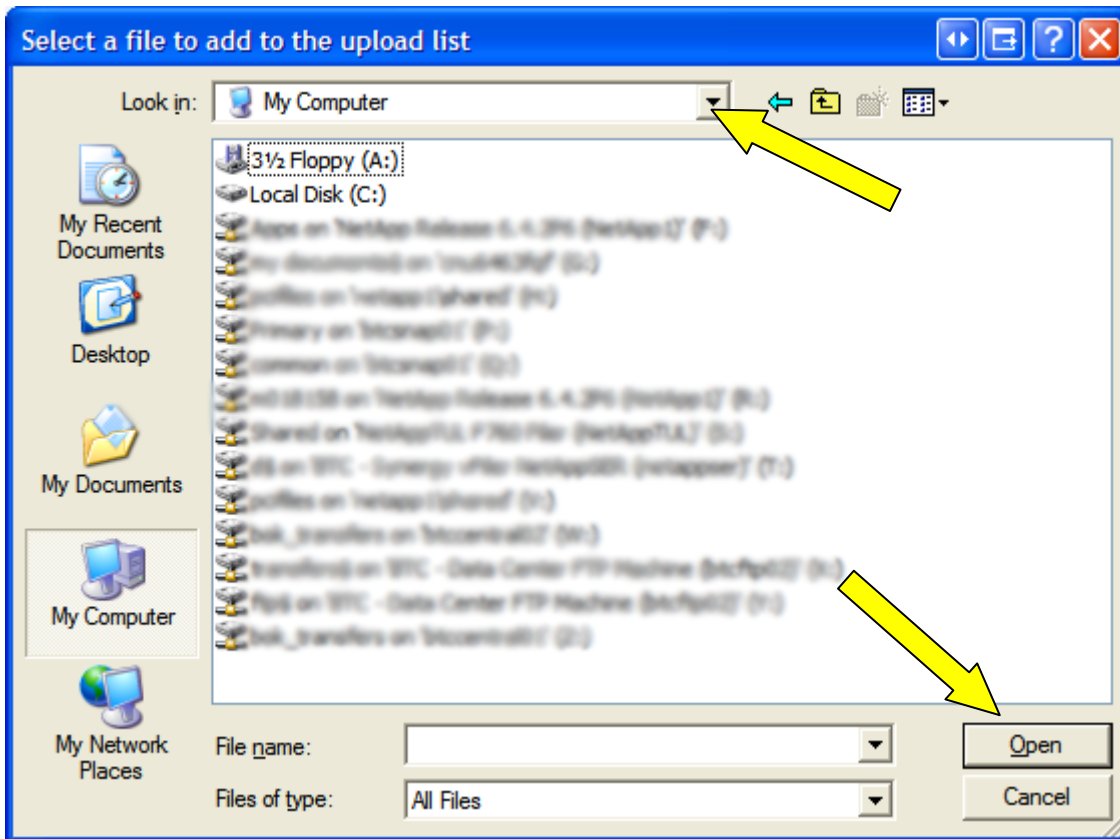
- Type: <https://transfer.bokf.com> to access the website.
- Type: Username
- Type: Password (case sensitive)
- Click: Sign On button



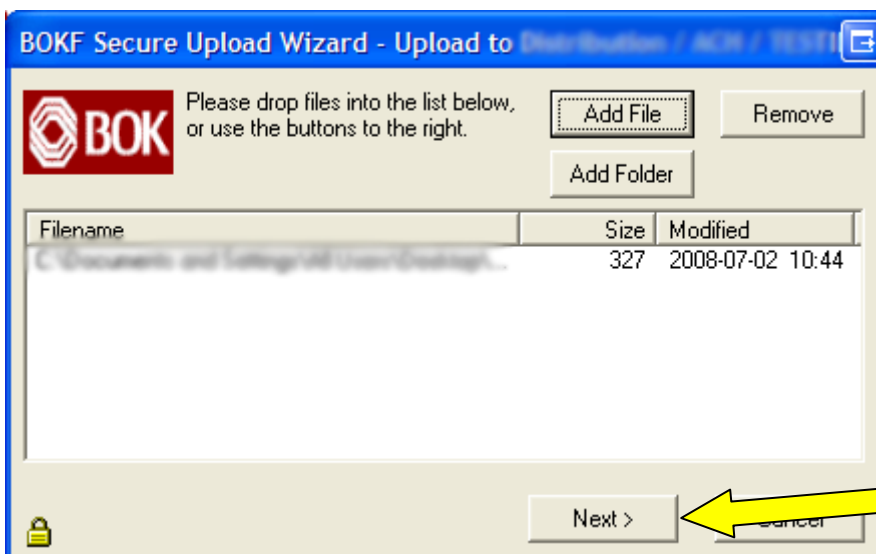
- Choose an upload location from the “Select a folder” menu box,
- Select “[CLICK HERE to Launch the Upload Wizard](#)”.



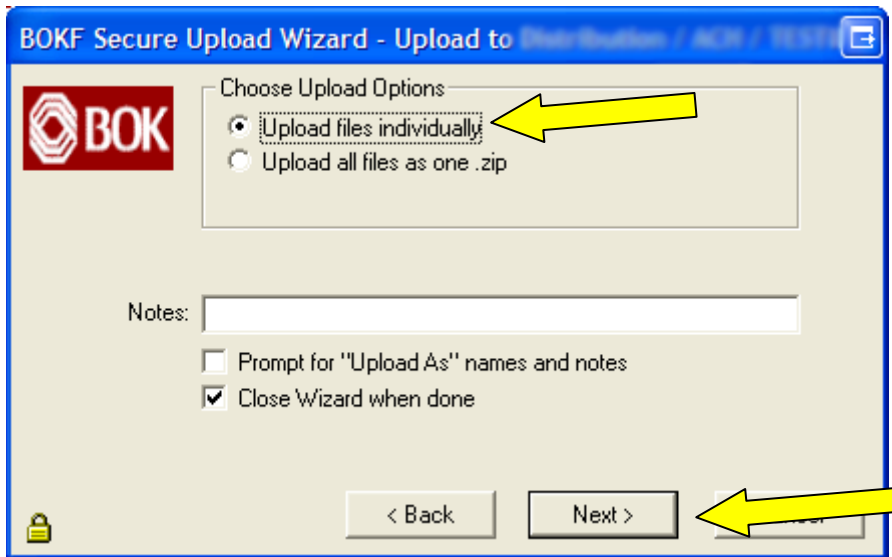
- Once the Upload Wizard window appears, click on the [Add File](#) button.



- Browse to a file to upload and select it.
- Select **“Open”**.



- Check to ensure the correct file or files have been selected.
- Select “Next”.



- Select the Upload Option:
  - Upload files individually
- Select “Next”.

The screenshot shows the BOK Financial website interface. At the top, there is a red header with the BOK Financial logo and the text "Signed onto BOK Financial as [bokf\\_test\\_account](#) Account Options - Sign Out". Below the header, there is a navigation menu with "Home", "Need Help?", "Online Manual", and "Tech Support". The main content area has a red background with two sections: "Browse Files and Folders..." and "Upload a File Now...". The "Upload a File Now..." section includes a folder selection dropdown menu showing "Distribution / ACH / TESTING" and a link "CLICK HERE to Launch the Upload Wizard...". Below this, there is a table with the heading "Upload Wizard Transfer Report" and a yellow arrow pointing to the "Upload Wizard Transfer Report" link. The table has two columns: "Local File" and "Status". The "Local File" column shows a file icon and the path "C:\Documents and Settings\all Users\Desktop\Test.txt". The "Status" column shows "Uploaded to Distribution / ACH / TESTING OK (ID # 20091220)".

- You may get a final pop up box stating that the transmission completed and if so select “OK”.
- Note the [Upload Wizard Transfer Report](#) on screen as it will describe if the transmission was successful as well, and if an error occurred it will contain the details as to why it was unable to upload your file.

### \*\*\*Caution\*\*\*

Make sure you close your browser when transfer is complete so the session is terminated. This website will time out after 20 minutes of no activity.



# Welcome to BOK Financial Secure File Transfer

## Download Procedures

**Please Note:** This document assumes that you have already performed an initial login to the Secure File Transfer Website, established your permanent password, and installed the [Upload/Download Wizard](#). Information on how to do this can be found in the [SFTW Initial Signon Procedures](#) document. If you need this document or need assistance please contact the BOKF Helpdesk at (918) 588-8600 and have a ticket opened to Transmission Services or email [transfer@bokf.com](mailto:transfer@bokf.com) and someone will contact you shortly to assist.

### There are 2 typical ways to download a file.

#### 1. Access your file directly via Secured Link:

If you receive an email from [transfer@bokf.com](mailto:transfer@bokf.com) that states “New File Notification” in the subject line you can click the secured link in the email, sign on, and it will take you directly to the location of the file.

#### 2. To manually go to a folder and Download a file use the following generalized instructions.

**BOK FINANCIAL**

**Sign On**

Username:

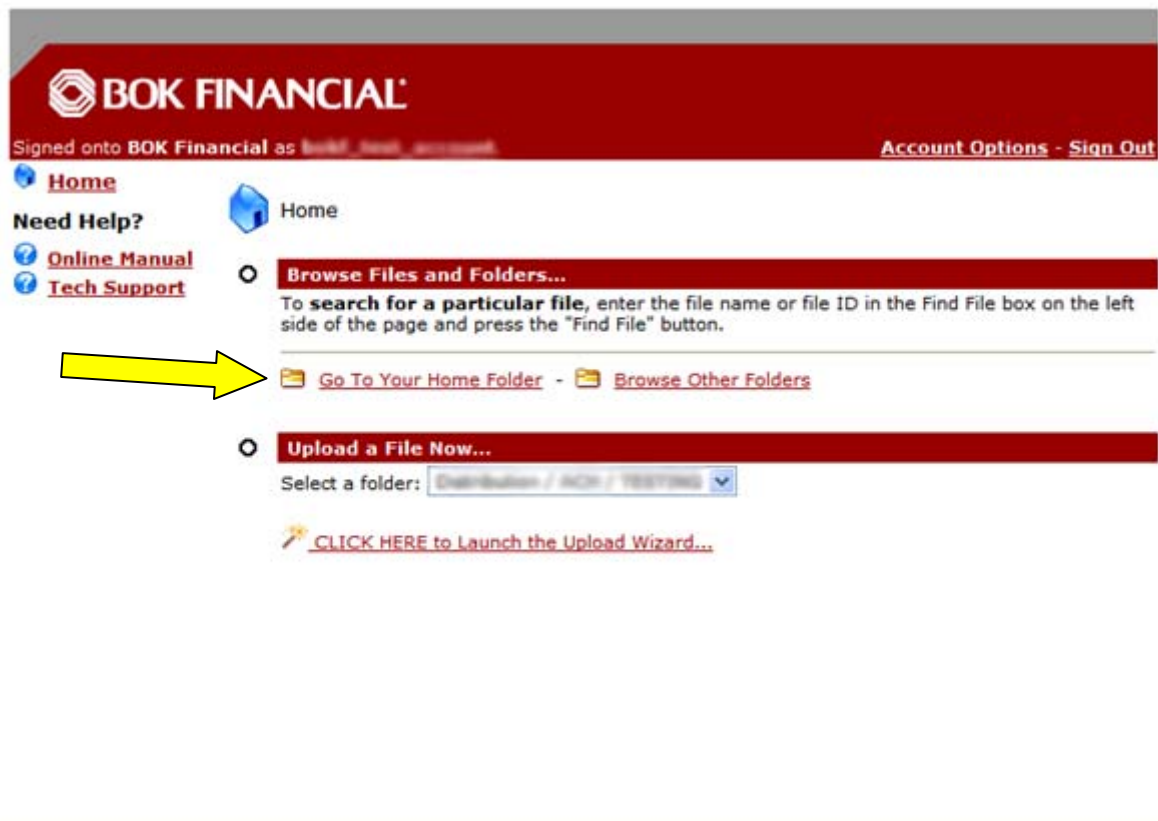
Password:

**Security Notice**  
You are about to access a secured resource. BOK Financial reserves the right to monitor and/or limit access to this resource at any time.

Need Help? [Tech Support](#) - [Online Manual](#)  
Forgot your password? [Request a password change](#)

- Type: <https://transfer.bokf.com> to access the website.
- Type: Username

- Type: Password (case sensitive)
- Click: Sign On button



- Select “Go To Your Default Folder”.

**BOK FINANCIAL**

Signed onto BOK Financial as [bokf\\_test\\_account](#). [Account Options](#) - [Sign Out](#)

[Home](#)

Need Help?

- [Online Manual](#)
- [Tech Support](#)

[Home / bokf\\_test\\_account](#)

Folders and Files			
Name	Created	Size/Contents	Actions
<a href="#">Parent Folder</a>			
<a href="#">download</a>	4/6/2009 2:09:06 PM	1	

A yellow arrow points to the 'download' file in the table.

- Select a folder from the list of folders that you have. You could have several folders varying on what lines of business you currently have with BOKF.
- Once you are in the folder you want and find the file you want please continue to the next step.

**BOK FINANCIAL**

Signed onto BOK Financial as [boki\\_test\\_account](#) [Account Options](#) - [Sign Out](#)

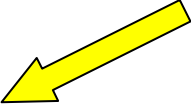
[Home](#)

Need Help?  
[Online Manual](#)  
[Tech Support](#)

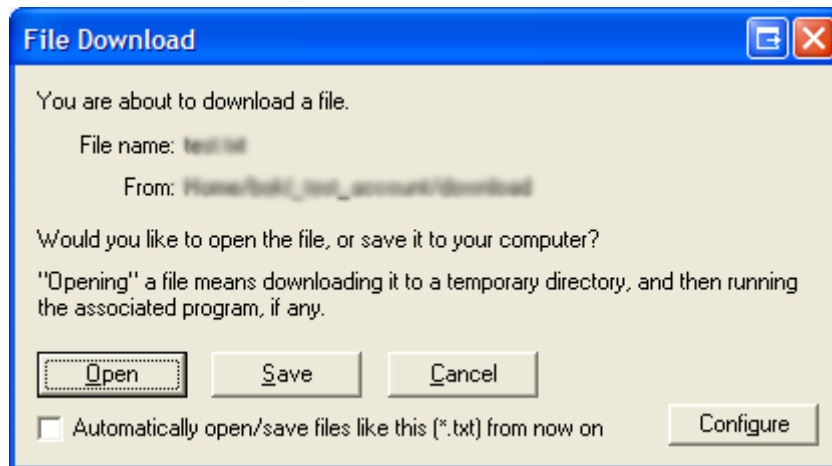
[Home](#) / [boki\\_test\\_account](#) / [Download](#)

**Folders and Files**

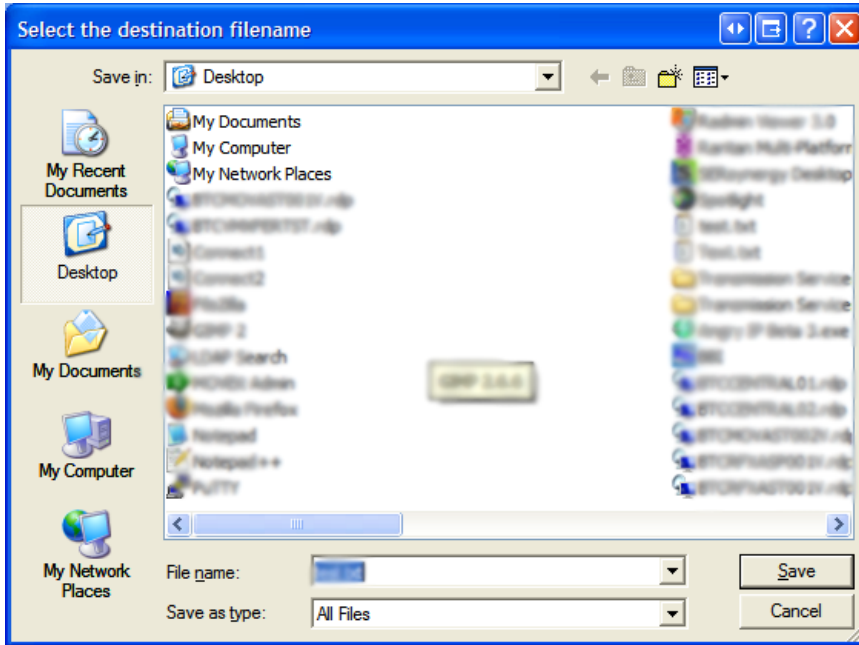
Name	Created	Size/Contents	Actions
Parent Folder			
<a href="#">test.txt</a>	4/6/2009 2:09:41 PM	47.0 B	<a href="#">Delete</a> - <a href="#">Download</a>



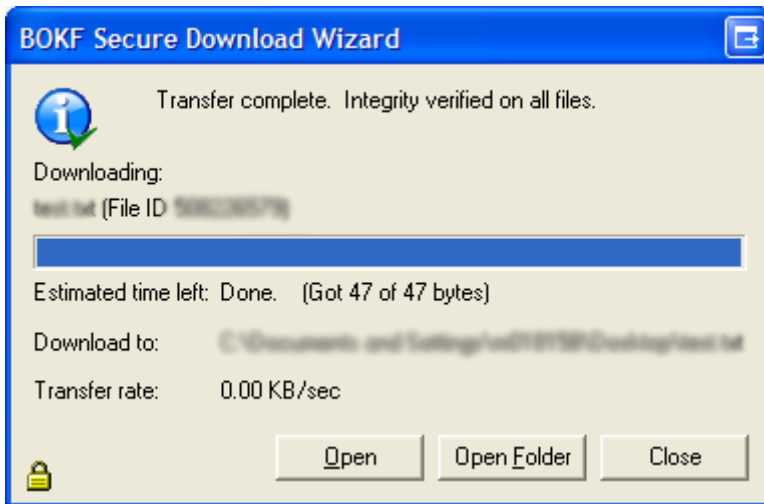
- Select “Download” on the file you need to download.



- Select “Save”.



- Choose a location on your hard drive or network share to save the file then select “Save” again.



- Select “Open Folder”.

**\*\*\* Caution \*\*\***

Make sure you close your browser when transfer is complete so the session is terminated. The Secure File Transfer Website will time out after 20 minutes of no activity.