

# **Sterling File Gateway**

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## **myFileGateway Help**

**Version 1.1**



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# Overview

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## About Sterling File Gateway

Sterling File Gateway is an application for transferring files between partners using different protocols, file naming conventions, and file formats.

Sterling File Gateway utilizes the Sterling B2B foundation, which includes Gentrans Integration Suite, Sterling Standards, and the Sterling platform, to deliver capabilities similar to those found in Sterling Advanced File Transfer and Connect:Enterprise for UNIX, while adding new features and functionality.

Use Sterling File Gateway for movement of large and high-volume file transfers, with end-to-end visibility of file movement in a process-oriented and highly-scalable framework that alleviates file transfer challenges, such as protocol and file brokering, automation, and data security.

Sterling File Gateway supports integration with Gentrans Integration Suite Mailbox, Sterling Control Center, Connect:Enterprise for UNIX server products, and Connect:Direct . Sterling File Gateway, which is delivered atop the Gentrans Integration Suite platform with a unique application URL, provides single sign-on access to the Gentrans Integration Suite administrative console through menu selection.

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## Features

Sterling File Gateway provides many features:

- File/File name Transformations – Flexible and powerful way to map input to output file names, leveraging regular expressions; support for system-wide and group policies as well as partner-specific definitions; pre-built support for common file processing tasks: compression/decompression, and PGP encryption/decryption, and signing.
- File Transfer Visibility – Events recorded for monitoring and reporting; detailed tracking for input-output file structure processing and dynamic route determination (run-time resolution decisions); ability to view all Sterling File Gateway data flows for all users and filter such views.
- Replay/Redeliver – One click replay/redeliver capability that allows users to reprocess a transmission from the beginning or to resend just the processed file to a specific delivery destination.
- Notifications – Partners and operators can subscribe to be notified about events by email.
- Predefined business processes – Define common behaviors in file-transfer scenarios, reducing the need for customization.

- Extensibility – Custom event codes, protocols, and consumer identification policies can be added to support unique scenarios.
- Broad Communications Protocol Support – FTP, FTP/S, SSH/SFTP, SSH/SCP, and Connect:Direct are supported upon installation, and additional protocols (such as AS2, AS3, or Odette FTP) may be configured through use of the extensibility feature.
- Partner Interface (*myFileGateway*) – Web browser-based interface that enables partners to upload/download files, subscribe to notifications of events, manage passwords, search and view file transfer activity, and generate reports about file transfer activity.
- Flexible Mailbox Structures – Ability to specify mailbox structures that leverage pattern matching policies and specify attributes that must be true of all partners or a subset of partners
- Dynamic Routing – Consumer derived at run-time, either through mailbox structure, business process-derived consumer name, or map-derived consumer name.
- Partner Onboarding – Easy-to-use graphical user interface to onboard partners and configure the various combinations of communication protocols to enable Sterling File Gateway operations.

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## About the Web Application *myFileGateway*

Partners send and retrieve files from the Web application *myFileGateway*. To log in to *myFileGateway*, a valid user account is required. This user account is created when a Route Provisioner onboards the Partner.

From within *myFileGateway*, Partners can:

- Upload or download files.
- Search for routes they participated in.
- View recent activity and status for file transfers they participated in.
- Generate reports for activity they participated in.
- Subscribe to notifications.

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## Role of the Partner in *myFileGateway*

Partners can be internal or external.

Partner users can:

- Upload files to *myFileGateway*
- Download files from *myFileGateway*
- View the status of file transfers they participate in
- Choose events to be notified about when the events occur
- Manage their own password
- Generate reports

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## Access *myFileGateway*

A System Administrator must establish an account for a Partner before the Partner can access *myFileGateway*.

To access *myFileGateway*:

1. Obtain the URL for *myFileGateway* from the System Admin.
2. Disable pop up blocker in your browser.
3. Set your browser options to select TLS 1.0 (in the Advanced tab).
4. Log in to *myFileGateway* with the user name and password supplied by the System Admin.

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## Change Your Password

You can change your password at any time, and you must change your password if prompted at login.

To change your password:

1. From the main menu, select **Profile > Password**.
2. Enter your current password.
3. Enter your new password in accordance with the policy set by your System Administrator.
4. Retype the new password to confirm it.
5. Click **Save**.

# Use myFileGateway

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## Retrieve a File Using *myFileGateway*

In *myFileGateway*, Partners retrieve a file from a mailbox.

To retrieve a file:

1. From *myFileGateway*, click on the Download tab.
2. Select a file from the list of files. Only files present in the mailbox that you have permission to download are provided in the list.
3. Select whether to open or save the file.
4. To save the file, browse to the location for the file to be saved. Select the location and click **Save**.

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**Note:** During the file transfer, if you click **Cancel**, the transfer may or may not be stopped, depending on the size of the file and rate of transfer. Click **Refresh** to see if the file is still available for download.

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## Send a File Using *myFileGateway*

To send a file:

1. In *myFileGateway*, click on the Upload tab.
2. Select the mailbox path where the file should be dropped off.
3. Enter the name and location of the file or browse to the file to be uploaded.
4. If you want to rename the file, enter the new file name.
5. Click **Send**.

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**Note:** Depending on the size of the file and the rate of transfer, you may have to wait for the file transfer to complete.

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## Search for a File in *myFileGateway*

Search for a file to view details about the events that occurred during routing.

You can only view files you are the producer or consumer for. The events you can view for the file depend on whether you are the producer or the consumer.

1. On the **Search Criteria** tab, enter the basic search criteria.
2. For **Producer**, indicate if you want to search for activity you were the producer for.
3. For **Consumer**, indicate if you want to search for activity you were the consumer for.
4. For **Status**, select Started, Succeeded, or Failed. Leave blank to search for routes with any status.
5. For **Protocol**, select from: FTP, SFTP, Connect:Direct, or In Mailbox. Use In Mailbox to search for routes that have not been retrieved. Leave this field blank to search for routes using any protocol.
6. For **Original File Name**, type the full or a portion of the file name of the file before processing. This field is case-sensitive. Only those files containing the string you enter will be matched in the search. Leave this field blank to search for all file names.
7. Click **Find** to initiate the search.

The **Search Results** tab opens and the **Arrived File** pane is displayed with results matching all of your criteria. A maximum of 1000 files is displayed. The following information is provided for each arrived file:

- Reviewed
  - Status
  - Producer
  - File Name
  - Discovery Time
8. If more than 1000 files match your criteria, a message is displayed indicating that you have more than 1000 matches and need to narrow your search.
  9. Sort the results by clicking on any column header. Click the column header again to change from descending order to ascending order. The default sort is by Discovery Time, in descending order.

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## Generate Reports in *myFileGateway*

To generate reports:

1. In *myFileGateway*, click on the **Reports** tab.
2. Select the information you would like the report to contain. Leave any field blank to select all possible values. Options are:

Field	Description
Producer	Indicate if you were the producer on activity to include in the report.
Consumer	Indicate if you were the consumer on activity to include in the report.

Field	Description
Status	Select from: <ul style="list-style-type: none"> <li>• Started - includes Determining Delivery and Delivering</li> <li>• Succeeded - includes Complete</li> <li>• Failed - includes Failed</li> </ul>
Date (From)	Click on the calendar icon to select a starting date.
Date (To)	Click on the calendar icon to select an ending date.
Time (From)	Specify a time in the format hh:mm:ss.  <b>Note:</b> Query in server time. Report results will be in server time, regardless of the header label.
Time (To)	Specify a time in the format hh:mm:ss.  <b>Note:</b> Query in server time. Report results will be in server time, regardless of the header label.
Group By	Select from: <ul style="list-style-type: none"> <li>• Producer</li> <li>• Consumer</li> </ul>
Format	Select from: <ul style="list-style-type: none"> <li>• HTML</li> <li>• PDF</li> <li>• XLS</li> </ul>
Report Type	Select from: <ul style="list-style-type: none"> <li>• Detailed - includes a Producer ID (assigned by the system), Consumer, Discovery Time, Completion Time, Status, Original File Name, and File Size</li> <li>• Summary - includes Total File Size and Total Count by Success, Error, In Progress, and Failure Reviewed</li> </ul> <b>Note:</b> Error count is the number in Failed status that have not been reviewed.
Sort By	Select from: <ul style="list-style-type: none"> <li>• Status</li> <li>• File Name</li> <li>• File Size</li> </ul>

### 3. Select Generate Report.

Depending on your selections, the report has the following contents:

Field	Definition
Created On	Date and time report was requested
Created By	User ID that requested the report
Group By	How the data is grouped



Field	Definition
Report Config	Selections made for report
Filters	How the data is ordered
Producer ID	User ID that created and sent the file
Consumer	Partner that received the file
Discovery Time	Time file first entered system, in the server time zone, regardless of the header label
Completion Time	Time file transfer was completed, in the server time zone, regardless of the header label
Status	Status when report was generated
Original File Name	Name given to the file by the producer
File Size	Size of the transferred file
Summary <ul style="list-style-type: none"> <li>• Producer</li> <li>• Total File Size</li> <li>• Total Count</li> <li>• Success</li> <li>• Error</li> <li>• In Progress</li> <li>• Failure Reviewed</li> </ul>	<p>For each producer, the total file size transferred in the report period, total count of files transferred in the report period, and a count for each status category.</p> <hr/> <p><b>Note:</b> Error count is the number in Failed status that have not been reviewed.</p> <hr/>

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## Subscribe to Notifications

Subscribe to notifications to receive email about Sterling File Gateway activity.

You can subscribe to certain events in Sterling File Gateway. When you subscribe to an event, a notification is emailed to you whenever that event occurs, if you have permission on the event. Event permissions are managed by the System Administrator. Your user account must be configured with a valid email address to receive notifications. To subscribe to events:

1. From the main menu, select **Profile**.
2. Select the **Notifications** tab.
3. Drag an event from the left pane to the right pane to enable notifications.

When an event that has been subscribed to occurs, an email notification is sent to the email address in your user account.

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## About Event Codes for Partners

Each activity during the progress of a file transfer generates an event code. These codes are displayed in the activity details to enable Partners to see the progress and navigate to more details.

Depending on when the events occur in the processing and transferring of files, some event codes can only send notifications to producers or consumers. Permissions set by the System Administrator also control which event codes each Partner can subscribe to.

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