Sterling File Gateway

Route Provisioner Help
Version 2.0

IBM

Contents

Partners

About Partners

Sterling File Gateway enables the exchange of files between partners through routing channels that are set up to connect specific partners. Partners that send files into Sterling File Gateway are referred to as producers, and those that retrieve files are referred to as consumers. A partner can be a producer, a consumer, or both from an operational standpoint.

Route Provisioners create, edit, and delete partners. Before partners can be created, though, it is important that the System Administrator configure any communications adapters the partners may need to use so that permissions are set correctly.

Each partner is associated with exactly one community.

If consumer partners will use SFTP, create the remote SSH Profile before creating the partners.

If partners will use PGP, perform the following before creating the partners:

• Install PGP server
• Start CLA2Client.jar process
• Modify PGPCmdlineService in B2B Console
• Create a PGP Profile named AFTPGPProfile in the B2B Console

When a partner is created in Sterling File Gateway, the following objects are created to support the partner:

• A Sterling Integrator user account
• A Sterling Integrator mailbox using the partner name
• A Sterling Integrator virtual root for the user and mailbox

The user account is automatically assigned to the File Gateway Partners Users group, or the custom group which is set as default group in filegateway_ui.properties file. The user group users are assigned to has specific permissions that are granted to the users. See *About Permissions*.

If the partners will be authenticated outside of Sterling File Gateway, the System Administrator must establish your authentication server and Authentication Management System before you create the partners. Do not remove or reorder the authentication servers in the customer_overrides.properties file after creating partners associated with them.

To apply a password policy other than the default password policy provided in Sterling Integrator, the System Administrator must create the new policy in Sterling Integrator before you create the partners. Select the new policy from the list when creating the partners.

Create a Partner

You can create partners in a test system and migrate them to a production system using Export and Import, or you can create partners directly in a production system. To avoid conflicts between systems, you should create partners in either the source or target system of Export/Import, not both.

Important: Do NOT use the Sterling Integrator Trading Partner Advanced option to configure or maintain Sterling File Gateway Partner options. For example do not use Trading Partner Advance Option Transports for communication parameters. Use Sterling File Gateway to maintain Sterling File Gateway partners.

To create a partner:

1. From the main menu, select **Participants** > **Partners**
2. Click **Create**.
3. From the **Community** list, select the community to which this Partner will belong.
4. Complete the steps in the wizard to enter the information for the Partner.

Field	Description
Partner Name	A unique name with a maximum of 100 characters. Spaces are allowed. Two partners cannot have the same Partner Name. You cannot modify the Partner Name after the partner is created.
Partner Code	The Partner Code field is optional. If not specified, a Partner Code is generated based on the Partner Name, up to the first 24 alphanumeric characters, when the partner is created. A maximum of 24 alphanumeric characters. Only characters from the US-ASCII alphabet, numbers, and special characters of underscore, dash and period are permitted. Two partners cannot have the same Partner Code. You cannot modify the Partner Code after the partner is created. **Note:** If you specify a Partner Code different from the Partner Name, do not specify ProducerCode or ConsumerCode in the root portion of the mailbox path when you create a routing channel. A mailbox would be created that cannot be accessed by users to download files. A consumer mailbox path pattern of /${ConsumerName}/from_${ProducerCode} or a producer mailbox path of /${ProducerName}/to_${ConsumerCode} is valid.
Address	Address of the Partner. Optional.
City	City of the Partner. Optional.
State	State or province the Partner operates in. Optional.
Zip or Postal Code	Postal code for the Partner. Optional.
Telephone Number	Phone contact number for the Partner. Required.
Country	Select from the list. Required. Default is UNITED STATES.
Time Zone	Select from the list. Required. Default is (GMT-05:00) Eastern Time (US & Canada).

Field	Description
Email Address	E-mail address of the Partner. Required.

5. Complete the steps in the wizard to create a user account:

Field	Description
Authentication Type	Valid values are: • Local • External - authenticated outside Sterling File Gateway For External Authentication Type, select the server that will perform authentication in the Authentication Host field.
User Name	A minimum of 5 characters and maximum of 36 characters. No spaces, tabs, or the following characters: !@#%^*()+?,<>[]{}\/"'|;
Password	A maximum number of 100 characters. Must comply with rules in the selected password policy, if one is specified. Disabled if Authentication Type is External.
Password Policy	Populated with values of password policy from Sterling Integrator. Default is blank (none). Disabled if Authentication Type is External.
Authentication Host	Populated with values from the customer_overrides.properties file. If you are using Sterling Secure Proxy for authentication, the settings in Sterling Secure Proxy override the entry here. Disabled if Authentication Type is Local.
Session Timeout (in minutes)	Number of minutes of inactivity before session ends. Default is 15. To change the default, System Administrators can edit customer_overrides.properties to set `filegateway_ui.fgOnboardingDefaultSessionTimeoutInMinutes = <new value>`
First Name	A maximum number of 64 characters.
Last Name	A maximum number of 64 characters.

6. Specify the partner role:

Field	Description
Partner is a Consumer of Data	Select if the partner receives data from the Router. Valid for the following partner conditions: • Initiates Protocol Connections • Listens for SSH/SFTP Connections • Listens for FTP Connections • Listens for Connect:Direct Connections • Listens for FTPS Connections • (Any custom protocols that have been added by the administrator)
Partner is a Producer of Data	Select if this partner initiates protocol connections and produces data.

7. Answer "Will Partner use either SSH/SFTP or SSH/SCP protocol to initiate connections?"

Select **Yes** or **No**. Default is No. If Yes, you can specify if Partner will use an Authorized User Key to authenticate.

8. Answer "Will Partner use an Authorized User Key to authenticate?"

   Select **Yes** or **No**. Default is No. If Yes, you must provide the Authorized User Key.

9. Confirm the Partner information and save.

10. Close the Communities window, but do not log out.

11. On the Partner page, click **Refresh** below the Partners list. The new Partner is listed.

   For each partner, one user account is automatically created and associated with the default user group. For additional users, create the user account in Sterling Integrator, then associate it with the partner identity and the appropriate user group.

   By default. Partners are automatically associated with the File Gateway All Partners partner group. System Administrators can change the default user group in customer_overrides.properties by setting the property fgOnboardingDefaultUserGroupId.

Edit a Partner

You should only edit partners during a time of no activity, such as a maintenance window. You can disable routing for maintenance by disabling the routing rule (FileGatewayRoutingRule) or by disabling the routing schedules:

• MailboxEvaluateAllAutomaticRules
• MailboxEvaluateAllAutomaticRulesSubMin

Important: Do NOT use the Sterling Integrator Trading Partner Advanced option to configure or maintain Sterling File Gateway Partner options. For example do not use Trading Partner Advance Option Transports for communication parameters. Use Sterling File Gateway to maintain Sterling File Gateway partners.

To edit a partner:

1. From the main menu, select **Participants** > **Partners**.

2. Select the partner in the list. To select from the list, type characters and **Enter** to narrow the list to items containing those characters. Scroll to select an item from the list. Backspace to remove characters and **Enter** to return to the full list.

3. Click **Edit**. The following fields cannot be edited:

   • Partner Name
   • Partner Code
   • User Name

   Note: The Edit button is only enabled if the Partner was created in Sterling File Gateway or migrated from AFT or Connect:Enterprise for UNIX.

4. Make the desired changes and click **Save**.

5. Close the window to return to Sterling File Gateway, but do not log out.

Reports and searches for operations involving the Partner are unaffected by editing the partner.

Delete a Partner

To delete a partner:

1. From the main menu, select **Participants** > **Partners**.
2. Select the partner in the list and click **Edit**.
3. Sterling Integrator opens in a new window. Select **Return**.
4. Click **Delete** next to the partner you want to delete. You can only delete partners created in Sterling File Gateway or migrated from AFT or Connect:Enterprise for UNIX.
5. When prompted "Are you sure you want to delete this trading partner. Contents related to this trading partner will be lost?" Select **Yes** to delete the partner or **Cancel** to keep the partner.

   Note: When you delete a Partner, any routing channels that have that Partner as the producer or consumer are also deleted. Though the partner is deleted, information about operations that involved the deleted partner are retained until purged.

6. Click **Return**.
7. Close the **Communities** window, but do not log out.

Routing Channels

About Routing Channels

Routing channels match incoming producer files to the appropriate consumer, then transform the file and file name according to the policies of the consumer.

Route Provisioners create routing channels. Before routing channels can be created, the Integration Architect must have already created a routing channel template and the Route Provisioner must have created the producer and consumer Partners.

For a static routing channel, the consumer is explicitly identified during the configuration, and there is only one consumer.

For a dynamic routing channel, no consumer is explicitly specified. The routing channel permits routing to any consumer belonging to the consumer group specified in the routing channel template.

You cannot create duplicate routing channels. A routing channel using the same routing channel template, producer, and consumer is a duplicate. At least one parameter must be different, with one exception. When using a static routing channel template where the ConsumerName or ConsumerCode fact is specified for the producer file structure in the outer file layer, or in the second file layer for ZIP files, you can use the same static routing channel template for multiple consumers. For example:

• StaticRCT1UsingConsumerFact, Producer1, Consumer1
• StaticRCT1UsingConsumerFact, Producer1, Consumer2

Create a Routing Channel

To create a routing channel:

1. From the Routes menu, select **Channels**.
2. Click **Create**, or right-click on the page and click **Create Routing Channel**.
3. Select a routing channel template from the list. If you select a static template, select a producer and a consumer. If you select a dynamic template, select only a producer.

To create multiple routing channels with the same template, producer, and producer mailbox, use a static template where the ConsumerName or ConsumerCode fact is specified in all producer file structures at the outer file layer, or the second file layer for ZIP files.

To select from the lists, type characters in the box to narrow the list to items containing these characters. The routing channel template list is case-sensitive according to your database settings, so type characters in the correct case. Scroll to select an item from the list. Backspace to remove the characters and to return to the full list. Specifying more field values narrows your search.

4. If prompted for additional values that represent provisioning facts, the maximum length allowed for a fact value is 255. Valid characters are:

• Alphanumeric characters
• Equal and space characters
• Unicode characters that represent alphanumeric in various languages

The following characters are explicitly prohibited because they are not allowed in a mailbox path:

```
? < > | ' " : / \ % *
```

Only partner users with the File Gateway Auto-grant Mailbox permission are given permission to partner mailboxes specified in a routing channel.

Routing Channel Request Form

Use this form to collect information from partners requesting a routing channel.

Complete the following form to request a routing channel:

Parameter	Value
Producer	
Will there be more than one consumer?	Yes No **Note:** If yes, routing channel is dynamic.
If there is only one consumer, specify the consumer mailbox.	
For dynamic determination of consumer, specify business process and element name in ProcessData.	
What is the file name pattern?	
What is the producer file structure?	
What is the consumer file structure?	

Search for a Routing Channel

Search for routing channels matching the criteria you specify to use.

To search for a routing channel:

1. From the **Routes** menu, select **Channels**.

2. Select a routing channel template from the list.

3. Click **Find**, or select a producer from the list.

4. Click **Find**, or select a consumer from the list.

5. You can specify any or all of template, producer, and consumer, or leave all fields blank to find all routing channels. To select from the lists, type characters in the box to narrow the list to items containing these characters. Scroll to select an item from the list. Backspace to remove the characters and return to the full list. Specifying more field values narrows your search.

6. Right-click on a routing channel to select **View associated Template**. The routing channel template details are displayed.

7. Sort the results by clicking on the header for any column.

8. If no results match your criteria, you will receive a message saying no matching routing channels were found. Create a routing channel with the criteria you require.

9. Widen your search by deselecting some criteria.

Edit a Routing Channel

You can edit routing channels, individually or in multiples, by changing which routing channel template they are associated with.

You should only edit routing channels during a time of no activity, such as a maintenance window. You can disable routing for maintenance by disabling the routing rule (FileGatewayRoutingRule) or by disabling the currently enabled routing schedule (either MailboxEvaluateAllAutomaticRulesSubMin or MailboxEvaluateAllAutomaticRules).

When changing the routing channel template associated with a routing channel, the new template may only differ from the original template in the following ways:

• The producer file structure can be different.
• The consumer file structure can be different.
• The special character handling can be different.
• Producer groups can be added.
• Consumer groups can be added.
• The consumer identification policy for a dynamic template can be different.
• The mailbox created on demand setting can be different.

There are some constraints on the revisions you can make to a routing channel template if you want the template to be associated with an existing routing channel:

• You cannot change the producer mailbox structure.
• You cannot change the consumer mailbox structure.
• You cannot change the number of delivery channels.
• You cannot delete groups.
• You cannot change the template type (static or dynamic).

If the new template you select to apply to the routing channel is different in any of the listed ways, the update will fail and the routing channel will not be modified.

To edit routing channels:

1. From the main menu, select **Routes** > **Channels**.

2. Under **Template**, click on the down arrow for the drop down list.

To select from the lists, type characters in the box to narrow the list to items containing these characters. Scroll to select an item from the list. Backspace to remove the characters and to return to the full list. Specifying more field values narrows your search.

3. Select a template from the list.

   Note: All routing channels you edit at one time must all be associated originally with the same routing channel template.

4. Click **Find**.
5. From the results list, select the routing channel to edit. Shift-click to select multiple contiguous channels or control-click to select multiple separated channels.
6. Click **Edit**.
7. Next to **Routing Channel Template**, click the down arrow for the drop down list.
8. Select a template from the list to apply to the channels you are editing, complying with the constraints stated above.
9. Review the results report to see the channels successfully and unsuccessfully edited.

Delete a Routing Channel

Delete a routing channel when it is no longer needed, or if the producer PGP settings have changed, thereby invalidating the routing channel.

You cannot delete a routing channel that is currently in use. To delete a routing channel:

1. From the **Routes** menu, select **Channels**.
2. Search for the routing channel to delete.
3. Select the routing channel to delete in the list.
4. Click **Delete**, or right-click and select **Delete this Routing Channel**.
5. If the routing channel is currently being used to route a file, you will receive a message to wait until that routing is complete. Confirm that you are deleting the correct routing channel.

   Note: Information about operations that involved the deleted routing channel are retained until purged.