

Sterling File Gateway

What's New in Build 4322

Version 1.1 Build 4322



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What's New in Build 4322

Enhancements in This Release

New features are introduced in this release that provide capabilities to limit access by partners to the myFileGateway user interface. For example, you can set up myFileGateway so that partner users can upload and download files, but not subscribe to notifications.

Authentication outside Sterling File Gateway is supported, and there are additional fields in the Create Partner wizard to define the external server, session timeout, and password policy.

Rebranding of Sterling File Gateway and myFileGateway persists through the application of new patches.

The details of enhancements included in this release are:

- New permission granularity enables system administrators to enable or disable functionality in myFileGateway for each partner user by assigning partner users to groups with limited permissions.
- Permissions can be managed to reduce the features available to partner users in myFileGateway.
- Permissions can be managed to control whether partner users are automatically given access to mailboxes created as a result of routing channels.
- Custom groups can be created to manage permissions for partners by associating partner users with groups with various permissions.
- System administrators can modify properties so that partners are assigned to a custom group by default.
- Additional fields in the Create Partner wizard:
 - Setting for external authentication
 - Specification of authentication host for external users
 - Specification of session timeout in minutes
 - Ability to explicitly assign a partner code
 - Specification of a password policy
- Improved steps in the *Delete a Partner* topic.
- Build 4322_generic_hotfix_2 and later performs a version check on system business processes to verify that the latest version is being run.
- Build 4322_generic_hotfix_2 and later provides additional visibility to files during routing by adding the following states to the Started status:
 - Determining Routes
 - Routing

Previous Issues That Are Resolved

For a complete list and description of issues that are resolved in this release, see:

[Sterling Commerce Customer Center](#), log in, select **Support Center**. Under **Product Support**, select **Sterling File Gateway > Product Updates and Downloads**.

Known Issues

For help with known issues, see:

[Sterling Commerce Customer Center](#), log in, select **Support Center**. Type your question or error message in the search box in the upper left hand corner and click **Go** to search Knowledgebase.

Note: If you do not wish to take advantage of these new capabilities with myFileGateway, no action is required to maintain all previous functionality.

System Administrator Help

Customized Business Processes (Build 4322_generic_hotfix_2 or Later)

Upgrading to a new build may install new versions of Sterling File Gateway system business processes. If you have modified the previous version of a system business process, the new version will be installed but will not be set as the default version. Your modified version will continue to be the default version. During the build installation, the output will produce a message on the screen and in the `installService.log` similar to the following:

```
Adding New system flow: FileGatewayMailboxRoute.bpml BPML has not been set as default version.
```

To use the new version of the system business process, you will need to manually update the business process to reflect your modifications and set it as the default version.

Sterling File Gateway 1.1 Build 4322_generic_hotfix_2 and later performs a version check on system business processes to verify that the latest version is being run. If the version check fails, all routes are marked as “Failed”. For a failed route, click on the row to view details. An error message of:

```
FG-0458 A newer version of Business Process xxx is installed, but is not the default chosen version.
```

This is a reminder to perform the changes and reset the default business process.

There is also a log entry when this occurs.

Export and Import Resources (Build 4322 or Later)

If you want to use the same configurations of partners, communities, partner groups, routing channels, routing channel templates, or custom file layers in multiple Sterling File Gateway installations, you can create them in one installation, export them from there, and import them into other installations. This is useful for first creating a test system and then moving the successful configurations to a production system.

It is a good practice to fully implement Sterling File Gateway in a test environment. You can configure the required resources, test to confirm that everything is functioning as you require, and then move to a production environment. You may want to use a staging environment as another step in the process. Use the export and import capabilities to move any or all of the following:

- Communities
- Partners
- Partner groups
- Routing channels
- Routing channel templates
- Producer custom file layers
- Consumer custom file layers
- Adapters
- SSH keys
- PGP profiles
- Mailboxes
- Mailbox routing rule named FileGatewayRoutingRule

The following constraints apply to exporting:

- You can only export one community at a time and each goes into its own file. This is because each community is associated with a unique resource tag that is applied to every partner belonging to the community (and to all resources that belong to each partner). Partners cannot be exported individually. Partners are exported by exporting the community the partners belong to, which exports all partners in the community at once.
- Although you can export only one community at a time, you can update the community resource tag to associate related resources and then export the resource tag. This ensures that related resources are exported together and then imported as a single unit. When resources are exported and imported individually, there is a risk of incorrectly ordering the files on import, which could cause the import of resources to fail.
- When a Routing Channel is selected for export, the export file will also include the Routing Channel Template referenced by the Routing Channel.
- When a Routing Channel Template is selected for export, the export file will also include the Partner Groups, Producer Custom File Layers and Consumer Custom File Layers referenced by the Routing Channel Template.
- When Producer and Consumer Custom File Layers are selected for export, the associated container Producer and Consumer File Layer Translations are also included in the export file. Non-container Custom File Layer Translations are included in an export file when the Custom File Layers involved in the translation have been selected for export, including cases where the Translation involves a System File Layer.
- When a Routing Channel is imported, the referenced Routing Channel Template must either already exist on the target system or be included in the current import file. If the referenced Routing Channel Template already exists on the target system, it must have been created there using an export file taken from the same system as the Routing Channel. If two identically named Routing Channel Templates were independently created on the source and target systems, then Routing Channels referencing the Routing Channel Template cannot be exported and imported across the two systems.
- 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.

To export and import resources:

1. To export and import from Sterling File Gateway, select **Tools > B2B Console > Deployment > Resource Manager > Resource Tags**.
2. Search for or select from the list the resource tag name (same as the community name). When selecting a large number of resources to associate with a resource tag, you may need to use the Tab key three times to view the **Finish** button.
3. Click **Edit** next to the Resource Tag.
4. Edit the community resource tag to add partner groups, routing channel templates, custom file layers, routing channels, business processes, maps, service configurations, SSH resources, and any other relevant resources.

5. Select from the following according to your needs:
 - Accounts (if created outside regular partner creation)
 - Service Configurations
 - Digital Certificates
 - SSH Resources
 - PGP Profiles
 - Perimeter Servers
 - Business Processes (if created for dynamic routing channel templates, custom file layers, or other extensibility)
 - Schedules
 - Mailboxes (if created outside regular partner creation or regular routing channel creation)
 - Maps (if created for extensibility)

6. Select **File Gateway Configurations** to access selections of the following:

- Routing Channel Templates
- Consumer Custom File Layers
- Producer Custom File Layers
- Partner Groups
- Routing Channels

Note: A partner group is the only File Gateway object that is updated upon import. All other File Gateway objects are not updated, regardless of the specification for the “Update Existing Object” value. To update any File Gateway object other than a group on the target system upon import, you must first delete it from target system.

7. Continue through the wizard, using the right and left arrows to select the components to include in the resource tag.
8. Click **Finish** to confirm the edits to the resource tag.

Note: When selecting a large number of resources to associate with a resource tag, you may need to use the Tab key three times to view the **Finish** button.

9. From the Administration menu, select **Deployment > Resource Manager > Import/Export**.
10. Click **Go!** next to **Export Resources**.
11. Choose **XML Document** for the type of format.
12. Select **Yes** for tag name.
13. Choose the resource tag with the name of the community name you want to export from the list.
14. Select whether to export private certificates.
15. Click **Finish** to confirm the report. The export file is created. Examine the export report to confirm that there are no errors.
16. Save the export file to an accessible directory.
17. In the target system, import the resources by selecting **Tools > B2B Console > Deployment > Resource Manager > Import/Export**.

When importing a community, a page is presented for each kind of resource in the export file. Choose all the objects for each kind of resource so all objects are imported. You cannot specify individual partners for

import; all the partners in the exported community are imported at once. Do not change the name of the resource tag. When importing routing rules, do not import any routing rules with a suffix of "_AFTRouter".

18. After importing, review the Import Report to verify a status of **Success** for each resource. Correct any conditions noted in the report that did not result in success.

Create User Accounts

When you install Sterling File Gateway, several default accounts are automatically created to get you started. You can use the default accounts to perform the tutorial described in the Overview.

One of the first actions you must take is to create your own accounts with unique IDs and passwords, because the default ones can be known by all Sterling File Gateway customers. Log in to Sterling File Gateway with the following credentials:

- User ID = fg_sysadmin
- Password = password

To create a user account:

1. From Sterling File Gateway, select **Tools > B2B Console**.
2. From within Gentran Integration Suite, select **Accounts > User Accounts > Create a new Account**.
3. Complete the steps in the wizard.

Supply the following information about the user:

- Authentication type (Local or external)
- User ID - by default, the User ID must be at least five characters. To enable shorter or require longer User IDs, add or modify the following property in customer_overrides.properties:

```
ui.userIdMinLength = # of characters
```

The value of # of characters must be greater than zero. To implement single sign-on, this value must match the value set in Gentran Integration Suite.

- Password
- Confirm Password
- Policy
 - [blank] (default)
 - Default User Policy - For the default user policy, the password must be at least six characters and is required to contain at least two of the following characters. (numeral, capital letter, !, @, #, \$, %, ^, &, *)
 - You can create a different policy for your system. Create the policy in Gentran Integration Suite first, then select it from the list when you create a user.

Note: See *Custom Password Policy* in the [Gentran Integration Suite 4.3 online library](#) for information on installing a custom policy extension. When a custom policy extension is installed, it is applied to all user accounts. If you want to force a password change upon a user's next login, ensure that the Default Password Policy is selected for that user account and the Default User Policy is configured with the "Required password change in first login attempt" option.

- SSH Authorized User Key

- Session Timeout (in minutes)
- Accessibility
- Dashboard Theme

See [Managing User Accounts](#).

4. Select one or more groups from the following list:

- File Gateway Integration Architects - can only access File Gateway, not *myFileGateway*
- File Gateway Operators - can only access File Gateway, not *myFileGateway*
- File Gateway Partner Users - can only access *myFileGateway*
- File Gateway Route Provisioners - can only access File Gateway, not *myFileGateway*
- File Gateway System Administrators - can only access File Gateway, not *myFileGateway*

Note: For full Sterling File Gateway functionality, each of these groups must have at least one user. By default, the following users are created during installation of Sterling File Gateway:

- fg_sysadmin - belongs to all File Gateway groups except File Gateway Partner Users. Also belongs to Gentran Integration Suite Admin group.
- fg_architect - belongs to File Gateway Integration Architects group
- fg_provisioner - belongs to File Gateway Route Provisioners group
- fg_operator - belongs to File Gateway Operators group

Note: To protect the security of your system, delete the default users or change the default passwords.

Note: To create an independent user that is the equivalent of fg_sysadmin, assign the Gentran Integration Suite Admin group and all File Gateway groups except File Gateway Partner Users group to the user.

Note: A partner user cannot be a member of any other File Gateway group.

5. Select the permissions for the user. Optional. The group assignments include the standard permissions for users of each group. To filter by permissions for Sterling File Gateway, select File Gateway under Type.
6. Supply the following information for the user:
- First Name
 - Last Name
 - E-mail
 - Pager
 - Preferred Language (English, Japanese, French, or Spanish)
 - Manager ID
 - Identity
7. Review and confirm to create the new user account.

About Permissions (Build 4322 or Later)

The permissions that control access to the pages of myFileGateway are:

- myFileGateway Login

- myFileGateway File Upload
- myFileGateway File Download
- myFileGateway File Activity
- myFileGateway Reports
- myFileGateway Change Password
- myFileGateway Help
- myFileGateway Event Subscription

Note: Partner users with the Event Subscription permission may receive notifications for events they have subscribed to, even if they do not have File Activity permission.

The Event Subscription permission only affects a user's ability to view and modify their subscriptions to events. If the Event Subscription permission is removed from a user or group, the user or members of the group will continue to receive notifications for any events already subscribed to, but cannot subscribe to additional events.

The File Gateway Partner Users group is assigned all of the available permissions, which means that all available pages of myFileGateway are displayed for partner users assigned to the File Gateway Partner Users group. To limit partners to fewer permissions, create a new group and assign only the desired permissions. See *About User Groups and Partner Groups*.

Do not modify the File Gateway Partner Users group, because your changes may be overwritten when later builds are applied.

Other Permissions

The permissions used in Sterling File Gateway are:

- File Gateway Auto-grant Mailbox Permissions
- File Gateway Producer Proxy

The File Gateway Partner Users group is assigned the File Gateway Auto-grant Mailbox Permissions. File Gateway Producer Proxy is for system use only.

About User Groups and Partner Groups (Build 4322 or Later)

User groups and partner groups are referred to as groups in Sterling File Gateway.

User groups, permission groups, or security groups all refer to groups that contain partner users. Permissions can be assigned to partner users or to user groups, and control permission for access to pages of the myFileGateway user interface.

User groups are managed in Gentrans Integration Suite, accessed from Sterling File Gateway by selecting **Tools > B2B Console > Accounts > Groups**. User groups may be assigned when the user is created, on the Partner Group Associate page, and during the aft2fg migration script. User group association, and therefore permissions, can be modified for partner users later, not just when they are created.

Note: When a partner is created in Sterling File Gateway, a user is also created and automatically assigned to the default user group. You can change the default user group. See *Change the Default User Group*.

The following user groups are installed with Sterling File Gateway:

- File Gateway System Administrators group
- File Gateway Integration Architects group
- File Gateway Route Provisioners group
- File Gateway Operators group
- File Gateway Partner Users group

There are specific permissions assigned to each user group. See *User Interface Access*. Do not change the permissions associated with these File Gateway user groups, because your changes may be overwritten when future builds of Sterling File Gateway are applied.

The term *partner group* refers to a separate and distinct concept. Partner groups are collections of partner users that have similar characteristics for use in routing channel templates. Partner groups are managed in Sterling File Gateway. Do not confuse partner groups with user groups.

User Interface Access (Build 4322 or Later)

Access to each page of the user interface is authorized based on permission groups assigned.

The following table describes which screens and functions each administrative user can access based on their function:

Page	System Admin	Integration Architect	Route Provisioner	Operator
Routes > Activity	(Default page.) Can search and view details and links to details in B2B Console. Can mark routes as reviewed or not reviewed. Can replay and redeliver.	Can search and view events, but cannot view linked details. Can mark routes as reviewed or not reviewed. Cannot replay or redeliver.	Can search and view events, but cannot view linked details. Can mark routes as reviewed or not reviewed. Cannot replay or redeliver.	(Default page.) Can search and view details and links to details in B2B Console. Can mark routes as reviewed or not reviewed. Can replay and redeliver.
Routes > Channels	Can view, create, and edit.	No access.	(Default page.) Can view, create, and edit.	No access.
Routes > Templates	Can view, create, and edit.	(Default page.) Can view and edit.	No access.	No access.
Participants > Groups	Can view, create, and edit.	Can view, create, and edit.	Can view, create, and edit.	Can view, create, and edit.
Participants > Partners	Can view, create, and edit.	Can view, create, and edit.	Can view, create, and edit.	Can view, create, and edit.
Participants > Communities	Can view, create, and edit.	Can view, create, and edit.	Can view, create, and edit.	Can view, create, and edit.
Tools > Reports	Can view, create, and edit.	Can view, create, and edit.	Can view, create, and edit.	Can view, create, and edit.
Tools > Activity Snapshot	Can view and get events and complete details.	Can view and get events, but not details.	Can view and get events, but not details.	Can view and get events and complete details.
Tools > B2B Console	Can view, create, and edit complete Admin menu.	Can only view and edit Accounts > My Account.	Can only view and edit Accounts > My Account.	Can view and edit Business Processes and Operations menus,

Page	System Admin	Integration Architect	Route Provisioner	Operator
				and Accounts > My Account.
Tools > Logs	Complete access to all logs.	No access.	No access.	Complete access to all logs.
Profile > Notifications	Can subscribe and delete.	Can subscribe and delete.	Can subscribe and delete.	Can subscribe and delete.
Profile > Password	Can change own password, unless external user. Can change other users passwords.	Can change own password, unless external user.	Can change own password, unless external user.	Can change own password, unless external user.
myFileGateway > Activity > Upload Files > Download Files > Reports > Profile	No access.	No access.	No access.	No access.
Help	Can view all Help libraries.	Can view all Help libraries.	Can view all Help libraries.	Can view all Help libraries.

To access myFileGateway, a partner user must have all of the following:

- Assignment to a File Gateway Partner in the Identity field of the user account in Gentran Integration Suite
- myFileGateway Login permission, either by membership in a group with the permission, or directly
- Permission to at least one myFileGateway module (File Activity, Upload Files, Download Files, or Reports)

Use Preconfigured User Groups to Assign Permissions in Sterling File Gateway (Build 4322 or Later)

To assign permissions to users, you can assign user accounts the groups that come preconfigured with Sterling Integrator. Users inherit all permissions associated with the groups.

Permissions Inherited from Groups

These groups are preinstalled with Sterling Integrator and the permissions are inherited when the group is assigned to a user account. The same permissions are inherited when a group is assigned as a subgroup.

Group	Permissions Inherited from the Group
File Gateway Integration Architects	Dash AFT Theme
File Gateway Operators	Dash AFT Theme, UI BP Manager, UI BP Monitor, UI Business Process, UI Lock Manager, UI Logs, UI Operations, UI reports Plus, permissions inherited from subgroups:

Group	Permissions Inherited from the Group
	Subgroup BPMONITOR - BPSSCorrelation, BusinessProcesses, CentralSearch, CommunicationSessions, Correlation, CurrentActivities, CurrentDocuments, CurrentProcesses, DataFlows, Documents, EBXMLCorrelation, EDICorrelation, EDIINT, GentranServerforUnix, Message Entry Workstation Home, SWIFTNETCorrelation, UI BP Monitor Subgroup OPERATIONS - JDBCMonitor, MessageMonitor, Perfdumps, SequenceManager, Statistics, ThreadMonitor, Troubleshooter, Tuning, UI Federated Systems, UI Operations
File Gateway Partner Users	myFileGateway Login myFileGateway Change Password myFileGateway Event Subscription myFileGateway File Activity myFileGateway File Download myFileGateway File Upload myFileGateway Help myFileGateway View Reports File Gateway Auto-grant Mailbox Permissions
File Gateway Route Provisioners	Dash AFT Theme
File Gateway System Administrators	None. System Administrators have unlimited access to all resources.

Modify Group Permissions for Administrative Users

Note: Do not modify the standard File Gateway groups. Your changes may be overwritten when you apply future builds of Sterling File Gateway.

System Administrators can create new groups with different permissions. For example, to create a group of operators that can view and edit troubleshooting menus, but do not have permission to view or edit tuning menus:

1. Select **Tools > B2B Console**.
2. From the Admin menu, select **Accounts > Groups**.
3. Next to **Create a New Group**, click **Go!**
4. Type a **Group ID** and **Group Name**. Click **Next**.
5. On the **Assign Subgroups** page, select BPMONITOR. Click **Next**.
6. On the **Assign Permissions** page, select the following:
 - **Dash AFT Theme**
 - **UI BP Manager**
 - **UI BP Monitor**
 - **UI Business Process**
 - **UI Lock Manager**
 - **UI Logs**
 - **UI Operations**
 - **UI reports**

- **Troubleshooter**

Click **Next**.

7. Click **Finish** and **Return**.
8. Create or edit users, assigning them to the group you just created. These users will have access to the **Operations > Troubleshooter** menu, without access to the **Operations > System** menu and submenus.

Modify Group Permissions for Partner Users

System Administrators can create new groups with different permissions. For example, to create a group of partner users that can upload and download files and view file activity, but cannot view reports or the Help menu:

1. Select **Tools > B2B Console**.
2. From the Admin menu, select **Accounts > Groups**.
3. Next to **Create a New Group**, click **Go!**
4. Type a **Group ID** and **Group Name**. Click **Next**.
5. On the Assign Permissions page, select the following:
 - myFileGateway Login
 - myFileGateway File Upload
 - myFileGateway File Download
 - myFileGateway File Activity

Click **Next**.

6. Click **Finish** and **Return**.
7. Create or edit users, assigning them to the group you just created. These users will have access to the **myFileGateway > File Activity**, **Upload Files**, and **Download Files** tabs, without access to the **myFileGateway > Reports** tab or the **Help** menu.

Change the Default User Group (Build 4322 or Later)

When partners are created in Sterling File Gateway, migrated using aft2fg, or associated with a File Gateway partner group, they are automatically assigned to a default user group. The default association is the File Gateway Partner Users group, which grants permissions to all features of myFileGateway, and no access to Sterling File Gateway. The system administrator must manually assign any other permissions, directly to a partner, or by assigning the partner to different permission user groups.

System administrators can change the default user group:

1. Select **Tools > B2B Console > Accounts > Groups**.
2. Create the user group, naming it with a prefix of "my".
3. Assign the permissions to be granted to all new partners by default to the new user group. See *About Permissions* for the values.
4. Note the group ID for the new user group.
5. Edit the customer_overrides.properties file to specify the new user group ID, as in the following example:

```
filegateway_ui.fgOnboardingDefaultUserGroupId=myCUSTOM_GROUP_ID.
```

where *myCUSTOM_GROUP_ID* is the group ID given in step 2.

6. Stop and restart Sterling File Gateway.

filegateway_ui.properties (Build 4324 or Later)

The filegateway_ui.properties file contains properties which control the location of the Help systems for Sterling File Gateway and *myFileGateway*.

The following table describes properties in the filegateway_ui.properties file:

Property	Description
reportingdirectory	Location of the reports templates. Default - reportingdirectory=&INSTALL_DIR/reporting Required. Do not modify or override.
help.uri	Specifies the URL for the Help used by filegateway. Required. The default is: <code>http://help.sterlingcommerce.com/SFG/index.jsp</code> . This site is hosted by Sterling Commerce.
myFghelp.uri	Specifies the URL for the help used by <i>myFileGateway</i> . Required. The default is: <code>http://help.sterlingcommerce.com/mySFG/index.jsp</code> . This site is hosted by Sterling Commerce.
notification.admin.url	Login URL for admin staff to access FileGateway. Required. Default is <code>notification.admin.url=http://&HOST_ADDR;:&PORT1 /filegateway</code>
notification.partner.url	Login URL for partner users to access <i>myFileGateway</i> . Required. Default is <code>notification.partner.url=http://&HOST_ADDR;:&PORT1;/myfilegateway</code>
fgMaxRoutingChannelRecords (Build 4318 or later)	Limits the total number of routing channel records returned by a search. Required. Default is 1000. You can change this to fine tune performance by editing the <code>customer_overrides.properties</code> file.
fgOnboardingDefaultUserGroupId	The group partner users are automatically assigned to when they are created as a result of creating a partner in Sterling File Gateway, migrated from AFT, or the partner's identity is associated with a File Gateway partner group. Default is File Gateway Partners Users group.
fgSkinName	The file that contains the branding information for Sterling File Gateway. Default is FileGateway.
myfgSkinName	The file that contains the branding information for <i>myFileGateway</i> . Default is FileGateway.
fgWindowTitle	The title of the window that displays in the top browser bar for Sterling File Gateway. Default is "Welcome to Sterling File Gateway."
myfgWindowTitle	The title of the window that displays in the top browser bar for <i>myFileGateway</i> . Default is "Welcome to Sterling File Gateway."
fgMaxActivityRecords	For the Arrived File page and reports, the maximum number of records to be displayed. Default is 1000.

Note: You should always use the `customer_overrides.properties` file to make customized changes to your property files. For more information, refer to [Overriding Property File Settings](#).

About Event Codes (Build 4322 or Later)

Each activity during the progress of a file transfer generates an event code. These codes are displayed in the activity details to enable Partners and Operators to see the progress and navigate to more details. System Administrators can create custom event codes and modify the permissions for standard event codes.

The following standard event codes display only in activity details:

Event Code	Name	Description
FG_0201	BusinessProcessStarting	When a business process is started, with the reason for starting it stored in context
FG_0202	BusinessProcessSuccess	When a business process is successfully completed, with a link to the business process
FG_0401	FactDiscovery	When a fact is discovered by the route, for example, matching a pattern on the file name
FG_0404	ProducerFound	When a producer and user are identified based on the arrived file
FG_0407	ConsumerFound	When a consumer is identified based on the route plan
FG_0409	ArrivedFileDeterminingRoutes	When an arrived file starts determining routes
FG_0410	ArrivedFileRouting	When an arrived file starts processing routes
FG_0412	RouteStarted	When a route is started from an arrived file
FG_0413	RouteDeterminingDeliveries	When a route starts determining deliveries
FG_0414	RouteDelivering	When a route starts processing deliveries
FG_0416	DeliveryStarted	When a delivery is started from a route
FG_0417	DeliveryTransforming	When a delivery starts to transform the consumer file
FG_0418	DeliveryDelivering	When a delivery starts delivering the consumer file to the consumer
FG_0421	ArrivedFileReplayOf	When an arrived file is a replay of an original arrived file, with a link to the original file
FG_0423	DeliverRedelivering	When a delivery starts redelivering the consumer file to the consumer
FG_0501	ProducerMailboxRouteCandidatesFound	When route candidates are found for an arrived file based on the producer and the mailbox of the message
FG_0502	RouteCandidatesFound	When route plan candidates are found for an arrived file
FG_0503	RouteCandidate	A route plan candidate for an arrived file
FG_0504	Route	When one or more routes are chosen from the candidates
FG_0505	RoutesFound	The number of routes that will be executed

Event Code	Name	Description
FG_0506	Route Candidate Does Not Match	When a routing channel template contains no matching producer file structure for an arrived file.
FG_0601	TransformedMessage	When a message is transformed to the final format for the consumer
FG_0602	ProducerPayloadExtracting	When the router begins to extract a producer payload file
FG_0603	ConsumerPayloadConstructing	When the router begins to construct a consumer payload file for delivery
FG_0604	ConstructedLayer	When a single layer in the consumer payload file gets constructed
FG_0605	ExtractedLayer	When a single layer in the producer payload file gets extracted
FG_0606	LayerOptions	When options are passed to a business process to process a layer.
FG_0701	DeliveredMailboxMessage	When a message is delivered to a mailbox (either a consumer mailbox or a mailbox for sending to a listening consumer)
FG_0702	DeliveredListeningPartnerMessage	When the file transfer is complete
FG_0703	ChangeDirectory	When the supported protocol changes directory on the listening consumer's server to transfer the file
FG_0704	ConsumerDestinationMailboxFound	When the destination mailbox for the consumer is discovered

Some event codes trigger notifications to subscribers. System Administrators can change the permissions for an event code by using the `customer_overrides.properties` file to override values in the `FGEventCodes.properties` file. The following event codes can be subscribed to by Operators, as the permissions are set at initial installation:

Event Code	Name	Description
FG_0050	MailboxAuthorizationFailure	When a user fails to access a mailbox that is monitored
FG_0250	BusinessProcessFailure	When a business process fails, with a link to the business process
FG_0408	ArrivedFileStarted	When a file arrives to be routed
FG_0411	ArrivedFileRouted	When an arrived file completes all its routes
FG_0415	RouteComplete	When a route completes all its deliveries
FG_0419	DeliveryComplete	When a delivery is complete
FG_0420	ArrivedFileReplayed	When an arrived file is replayed, with a link to the replay
FG_0422	Redeliver	When a redelivery is requested by a user
FG_0424	ArrivedFileIgnored	When an arrived file is ignored due to a configured pattern for ignoring files

Event Code	Name	Description
FG_0425	ArrivedFileDescription	The description of the Arrived File
FG_0450	ProducerMessageNotFound	When a producer message is invalid or cannot be found
FG_0451	ProducerDocumentNotFound	When a producer document is invalid or cannot be found
FG_0455	ArrivedFileFailed	When an arrived file fails
FG_0456	RouteFailed	When a route file fails
FG_0457	DeliveryFailed	When a delivery fails
FG_0550	ZeroRouteCandidatesFound	When no route candidates are found for an arrived file
FG_0551	ZeroRouteChannelsFound	When no route channels are chosen from the list of candidates for an arrived file
FG_0552	InvalidRoute	When a route is invalid
FG_0607	PGPConstructSkipped	When the PGP Construct layer is skipped because the consumer does not handle PGP and it is optional on the Routing Channel Template
FG_0650	ExtractLayerFailed	When extraction of a layer fails
FG_0651	ConstructLayerFailed	When construction of a layer fails

Depending on when the events occur in the processing and transferring of files, some event codes can only send notifications to producers or consumers. System Administrators can change the permissions for an event code by using the `customer_overrides.properties` file to override values in the `FGEventCodes`. The following event codes can be subscribed to by Partner users, as the permissions are set at initial installation:

Event Code	Name	Description	Notifies Producer, Consumer, or Both
FG_0408	ArrivedFileStarted	When a file arrives to be routed	Both
FG_0411	ArrivedFileRouted	When an arrived file completes all its routes	Both
FG_0415	RouteComplete	When a route completes all its deliveries	Both
FG_0419	DeliveryComplete	When a delivery is complete	Both
FG_0420	ArrivedFileReplayed	When an arrived file is replayed, with a link to the replay	Both
FG_0422	Redeliver	When a redelivery is requested by a user	Both
FG_0424	ArrivedFileIgnored	When an arrived file is ignored due to a configured pattern for ignoring files	Producer

Event Code	Name	Description	Notifies Producer, Consumer, or Both
FG_0425	ArrivedFileDescription	The description of the Arrived File	Producer
FG_0450	ProducerMessageNotFound	When a producer message is invalid or cannot be found	Producer
FG_0451	ProducerDocumentNotFound	When a producer document is invalid or cannot be found	Producer
FG_0455	ArrivedFileFailed	When an arrived file fails	Producer
FG_0456	RouteFailed	When a route file fails	Both
FG_0457	DeliveryFailed	When a delivery fails	Both
FG_0550	ZeroRouteCandidatesFound	When no route candidates are found for an arrived file	Producer
FG_0551	ZeroRouteChannelsFound	When no route channels are chosen from the list of candidates for an arrived file	Producer
FG_0552	InvalidRoute	When a route is invalid	Producer
FG_0607	PGPConstructSkipped	When the PGP Construct layer is skipped because the consumer does not handle PGP and it is optional on the Routing Channel Template	Consumer
FG_0650	ExtractLayerFailed	When extraction of a layer fails	Producer
FG_0651	ConstructLayerFailed	When construction of a layer fails	Consumer

Note: Partner users must belong to a group with the myFileGateway Event Notifications permission in order to subscribe to receive event notifications.

FGEventCodes.properties (Build 4322 or Later)

The FGEventCodes.properties file contains properties that control the operation of event codes in Sterling File Gateway.

There are multiple properties in the FGEventCodes.properties file for each event, in the format:

```
FG_<EVENT_CATEGORY><EVENT_CODE>.<PROPERTY_NAME>=<REPLACEABLE_TEXT>
```

where:

- <PROPERTY_NAME> is the parameter being defined for the particular event
- <REPLACEABLE_TEXT> is the value of the parameter for the particular event
- and the values used by Sterling File Gateway for <EVENT_CATEGORY> are:

Code	Category
00	Producer File Transfer
02	Routing Business Process
04	File Gateway General
05	Route Plan Determination
06	File Transformation
07	Consumer File Transfer

<EVENT_CODE> is a unique code (within the category) to identify this event. Check the other properties (or the FileGatewayEvent enumeration) to ensure no duplication.

<REPLACEABLE_TEXT> is text that displayed in the route details so users can monitor progress of the route.

The following information is provided for each event:

Property	Description	Example
Name	Name of the event. Displayed in the subscription UI (Profile > Notifications). Required.	XX_0050.name=MyCustomEventFailure
Attributes	Comma delimited list of named attributes to the event. Used in the text field and must correspond to the order listed in the text field. For example, UserId attribute corresponds to {0} below. All attributes need not appear in the text field. Required, but can be empty.	XX_0050.attributes=UserId,ErrorMessage
Text	Event description displayed in the route activity UI for a specific occurrence of this event. Required.	XX_0050.text=User {0} encountered failure {1}
Description	A generic event description that does not use attributes. Displayed in the subscription UI (Profile > Notifications). Required.	XX_0050.description=When a user encounters this custom event failure
Permissions	Comma delimited list that indicates who can be notified and who can view this event. Possible values are: <ul style="list-style-type: none"> • subscription - available for subscription to notifications • producer - producers can see in events list and receive notifications • consumer - consumers can see in events list and receive notifications Optional.	XX_0050.permissions=subscription

FGEventCodes.properties includes only standard events shipped with Sterling File Gateway. Custom events you create are entered and configured in customer_overrides.properties.

Note: Do not edit the FGEventCodes.properties file. Make all changes in the customer_overrides.properties file. For example, to change the name property for event code FG_06xx, enter the following line into customer_overrides.properties:

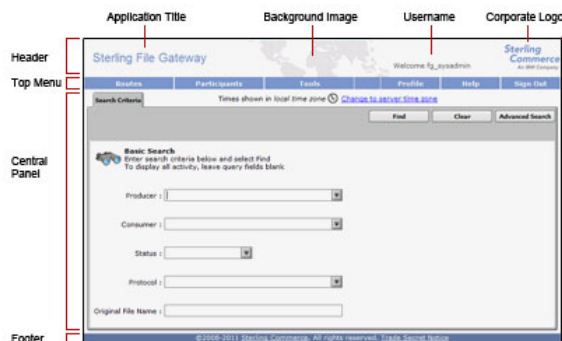
```
filegateway_eventcodes.CUST_0601.name=Custom
```

substituting CUSTOM with the name of your event code. See *Add Custom Event Codes*.

Rebrand Sterling File Gateway and *myFileGateway* (Build 4324 or Later)

You can rebrand Sterling File Gateway and *myFileGateway* to use your company's logo or other special content. To customize the look of Sterling File Gateway and *myFileGateway*, you create a skin, reference this new skin, and restart your system. You can use the same or different skins for Sterling File Gateway and *myFileGateway*.

The following figure shows the location of the portions of the screens you can rebrand:



The corresponding file names are:

- Header:
 - [skin]/brandingcontent/header.txt
 - [skin]/brandingcontent/myFgHeader.txt
 - [skin]/load_skin.js
 - [skin]/images/FGimages/brandingimages/...
- Top Menu: [skin]/skin_styles.css
- Central Panel:
 - [skin]/skin_styles.css
 - [skin]/load_skin.js
 - [skin]/images/...

- Footer: [skin]/brandingcontent/footer.txt

Note: If you rebranded Sterling File Gateway in a previous version, you must make an additional change after you install Build 4324. Add the property:

```
.menuBackground
```

to the custom skin .css file as in the following:

```
/* --- menu background color for main navigation bar;
default is #7896CF --- */
.menuBackground {
background-color: #7896CF;
}
```

To rebrand Sterling File Gateway:

1. Locate files in the following directories for the default skins:
<install_dir>/container/Applications/filegateway/isomorphic/skins/FileGateway
and
<install_dir>/container/Applications/myfilegateway/isomorphic/skins/FileGateway
2. Copy and rename the “FileGateway” file in path:
<install_dir>/container/Applications/filegateway/isomorphic/skins/FileGateway
You can use any valid file name. In the next steps, the renamed file is referred to as [skin].
3. To customize the header, you can change the following elements:
 - Application Title
 - Background Image
 - Corporate Logo
 - Position of the user name
 - HeaderALT
4. To change the Application Title:
 - a) Open the following file:
[skin]/brandingcontent/header.txt
 - b) Change line 15 to refer to your company name (padding-left: 15px" nowrap="nowrap">My Company</td>
)
 - c) Open [skin]/brandingcontent/myFgHeader.txt
 - d) Change line 15 to refer to your company name (or another name) (padding-left: 15px" nowrap="nowrap">My Company</td>)
5. To change the browser title text, in the top left-hand corner of the browser (if different from Application Title) set the variables:
 - fgWindowTitle (for Sterling File Gateway)
 - myfgWindowTitle (for *myFileGateway*)in customer_overrides.properties as:

```
filegateway_ui.fgWindowTitle=xxx
```

and

```
filegateway_ui.myfgWindowTitle=xxx
```

6. To change the Background Image:
 - a) Create a new Background Image GIF image, 66 pixels high by 800 pixels wide and named “MastheadBkgd_Map.gif”
 - b) Place this GIF in the following directory:[skin]/images/FGimages/brandingimages/
 - c) Open the following file: [skin]/brandingcontent/header.txt
 - d) Change line 3 to refer to your skin’s directory where the background image (from step 5) is located (isomorphic/skins/[skin]/images/FGimages/brandingimages/ MastheadBkgd_Map.gif)
 - e) Open [skin]/brandingcontent/myFgHeader.txt
 - f) Change line 3 to refer to your skin’s directory where the background image (from step 5a) is located (isomorphic/skins/[skin]/images/FGimages/brandingimages/ MastheadBkgd_Map.gif)
7. To change the Corporate Logo:
 - a) Create a new Corporate Logo GIF image, which should be 66 pixels high by 93 pixels wide and named “hdr_logo.gif”
 - b) Place this GIF in the following directory:[skin]/images/FGimages/brandingimages/
 - c) Open the following file: [skin]/brandingcontent/header.txt
 - d) Change line 18 to refer to your skin’s directory where the corporate logo image (from step 6a) is located (isomorphic/skins/[skin]/images/FGimages/brandingimages/ hdr_logo.gif)
 - e) Open [skin]/brandingcontent/myFgHeader.txt
 - f) Change line 18 to refer to your skin’s directory where the corporate logo image (from step 6a) is located (isomorphic/skins/[skin]/images/FGimages/brandingimages/ hdr_logo.gif)
8. To change the position of the user name:
 - a) Open the following file:[skin]/load_skin.js
 - b) Change the two variables on Lines 14 and 15 to position the name label where you desire:
 - headerUserNameTop (expressed in absolute pixels from the top)
 - headerUserNameLeft (expressed as a percentage of page width, from the left side)
9. To change the headerALT, which is displayed while the header is loading:
 - a) Open the following file:[skin]/load_skin.js
 - b) Change the variable on Line 13 (headerALT) to your company name (e.g. “My Company”).
10. To change the footer:
 - a) Open the following file: [skin]/brandingcontent/footer.txt
 - b) Modify the first line to refer to your company name as well as the link to your corporate Web site, if desired: ...href='http://www.MyCompany.com' target='_blank'>My Company...
11. To reference the new [skin], create or open customer_overrides.properties in a text editor. Add the following line:

```
filegateway_ui.fgSkinName=[skin]
```

where [skin] is your new skin name for Sterling File Gateway and

```
filegateway_ui.myfgSkinName=[skin]
```

where [skin] is your new skin name for myFileGateway. The values for [skin] can be different for Sterling File Gateway and myFileGateway.

12. To change the header only for *myFileGateway*:

a) Modify only the two files, header.txt and myFgHeader.txt in the new directory

```
at(<install_dir>/container/Applications/myfilegateway/isomorphic/skins/[skin]/brandingcontent
```

13. Run the following scripts:

- <install_dir>/bin/hardstop.sh
- <install_dir >/bin/depoyer.sh
- <install_dir >/bin/run.sh

14. Refresh your browser cache.

When you launch Sterling File Gateway, the new branding is shown in the header and footer. When your Partner users launch *myFileGateway*, the new branding is shown in the header.

Migrate from Advanced File Transfer to Sterling File Gateway (Build 4324 or Later)

If you have an existing installation of Advanced File Transfer (AFT), you can migrate the partner configurations to Sterling File Gateway.

To migrate partner configurations from AFT:

1. Start Gentran Integration Suite. Gentran Integration Suite must be up and running when the following script is run.
2. Run the following script:

```
<install_dir >/tp_import/aft2fg.sh (for UNIX) or aft2fg.cmd (for Microsoft Windows)
```

Note: Do not interrupt the script or allow Gentran Integration Suite to stop during the script. If the script does not complete successfully, you can run it again. If the problem persists, contact Customer Support.

3. The script performs the migration and displays details of the migration.

The following operations are performed:

- Static and dynamic routing channels are created, based on the consumer identification policies in effect for the migrated producers.
- AFT routing rules are replaced with a single automatic evaluation Sterling File Gateway routing rule.
- AFT Route Business Process is disabled.
- If a consumer identification policy of Use Map was utilized in AFT, a routing channel template is created so that the map will continue to drive the consumer identification. After conversion the name of the map used in the routing cannot be changed in Sterling File Gateway. The name of the map used is visible from the Data Session details window only.
- PGP settings remain in effect.
- The Advanced File Transfer tab in Gentran Integration Suite will be available, but limited to offer AFT Route Activity and Reporting links so that a legacy AFT user can still view old AFT data for as long as it exists in the system.

4. If the migration fails, an error message is displayed. The migration report states what changes were successfully completed. Correct the error conditions and proceed. It is safe to run the script again.
5. The imported partners will automatically be associated with the "All Partners" partner group. A different default group can be set in customer_overrides.properties by editing the property:

```
filegateway_ui.fgOnboardingDefaultUserGroupId=CustomUserGroup
```

where CustomUserGroup is the name of the group to assign to newly migrated users.

You can also associate the newly migrated Partner with other Sterling File Gateway partner groups to make them work with routing channel templates that have specified these partner groups.

6. Disable the AFTPurgeArchiveMailboxes business process in Gentran Integration Suite.
7. If you have created custom protocols in AFT, the custom business process that implements the protocol may need to be modified. If the business process name contained an underscore, parameters passed from AFT to custom protocol business processes were incorrectly prefixed with part of the business process name. In Sterling File Gateway, these prefixes are removed, which is the correct behavior. Edit your business process where the custom parameters are used and correctly reference them according to the table below.

	Parameter Definition	AFT Parameter	SFG Parameter	Changes Required?
My_CustProtBP	HostName	CustProtBP_ HostName	HostName	Yes. Change the custom protocol business process to use "HostName" instead.
CustomProtocolBP	HostName	HostName	HostName	No change required because the custom protocol business process name does not have an underscore.

See *Add Custom Protocols*.

Route Provisioner Help

About Partner Users

Partner Users are the user accounts associated with partners, and are also referred to as users. Users are managed in Gentran Integration Suite. Partner users created in Sterling File Gateway are managed in Sterling File Gateway. If you delete a partner user from Sterling File Gateway, only the default user account in Gentran Integration Suite is deleted. Any additional user accounts in Gentran Integration Suite are not deleted. To delete other user accounts, go to **Tools > B2B Console > Accounts > User Accounts**.

About Partners (Build 4322 and later)

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 AFTPGProfile in the B2B Console

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

- A Gentran Integration Suite user account
- A Gentran Integration Suite mailbox using the partner name
- A Gentran Integration Suite 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 Gentran Integration Suite, the System Administrator must create the new policy in Gentran Integration Suite before you create the partners. Select the new policy from the list when creating the partners.

Create a Partner (Build 4322 and later)

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.

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	<p>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.</p> <p>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.</p> <p>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.</p> <p>A consumer mailbox path pattern of /\${ConsumerName}/from_\${ProducerCode} or a producer mailbox path of /\${ProducerName}/to_\${ConsumerCode} is valid.</p>

Field	Description
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).
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: <ul style="list-style-type: none"> • 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 or 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 Gentran Integration Suite. Default is blank (none). Disabled if Authentication Type is External.
Authentication Host	Populated with values from the customer_overrides.properties file. Disabled if Authentication Type is Local.
Session Timeout (in minutes)	Number of minutes of inactivity before session ends. Default is 15. To change, set <code>filegateway_ui.propertiesfgOnboardingDefaultSessionTimeoutInMinutes=<new value></code> in customer_overrides.properties.
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: <ul style="list-style-type: none"> • Initiates Protocol Connections

Field	Description
	<ul style="list-style-type: none"> • 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 Gentran Integration Suite, then associate it with the partner identity and the appropriate user group.

Partners are automatically associated with the File Gateway All Partners partner group.

Edit a Partner (Build 4322 and later)

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 and MailboxEvaluateAllAutomaticRulesSubMin.)

To edit a partner:

1. From the main menu, select **Participants > Partners**.
2. Select the partner in the list. To select from the list in Build 4318 or later, 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. Gentran Integration Suite 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 only 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.

Create a Routing Channel (Build 4322 or later)

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.

With Build 4317 or later, to create multiple routing channels with the same template, producer, and producer mailbox, you must 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 in Build 4318 or later, 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.

With Build 4322 or later, only partner users with the File Gateway Auto-grant Mailbox permission are given permission to partner mailboxes specified in a routing channel.

Operator

Generate Reports

Several standard reports are defined in Sterling File Gateway.

To generate reports:

1. From the main menu, select **Tools > Reports**.
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	Select a producer for the arrived files to report on. Do not use if Producer Group is specified.
Producer Group	Select a producer group for the arrived files to report on. Do not use if Producer is specified.
Consumer	Select a consumer for the arrived files to report on. Do not use if Consumer Group is specified.
Consumer Group	Select a consumer group for the arrived files to report on. Do not use if Consumer is specified.
Status	Select from: <ul style="list-style-type: none">• Started - includes Determining Delivery and Delivering• Succeeded - includes Complete• Failed - includes Failed
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. Note: Query in server time. Report results will be in server time, regardless of the header label.

Field	Description
Time (To)	Specify a time in the format hh:mm:ss. Note: 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"> • Producer • Consumer
Format	Select from: <ul style="list-style-type: none"> • HTML • PDF • XLS
Report Type	Select from: <ul style="list-style-type: none"> • Detailed - includes a Producer ID (assigned by the system), Consumer, Discovery Time, Completion Time, Status, Original File Name, and File Size • Summary - includes Total File Size and Total Count by Success, Error, In Progress, and Failure Reviewed Note: Error count is the number in Failed status that have not been reviewed.
Sort By	Click and drag the following fields into the desired order for sorting: <ul style="list-style-type: none"> • Status • File Name • File Size

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
Report Config	Selections made for report
Filters	How the data is ordered
Producer ID	ID assigned by the system for the producer 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

Field	Definition
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"> • Producer • Total File Size • Total Count • Success • Error • In Progress • Failure Reviewed 	<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>Note: Error count is the number in Failed status that have not been reviewed.</p> <hr/>

Note: By default, reports only include the first 1000 activity records that match the specified criteria. Your System Administrator may set another value for the number of records to be included in reports. (See System Administrator > Install and Set Up > filegateway_ui.properties.)

Search for a File (Build 4322_generic_hotfix_2 or Later)

The **Basic Search** page enables you to search for a file based on criteria you select. The **Advanced Search** page provides more options for criteria.

You can specify more criteria to narrow your results, or fewer criteria to widen your results. For any field, leave blank to select all values.

1. On the **Search Criteria** tab, enter the basic search criteria. This page is useful for finding files in major categories. To search for more-specific files, select **Advanced Search**. All of the criteria on the Basic Search page are also available on the Advanced Search page, along with many more criteria.
2. For **Producer**, select from the list or type the producer name. Leave this field blank to search for files from all producers.
3. For **Consumer**, select from the list or type the consumer name. Leave this field blank to search for files from all consumers.
4. For **Status**, select from:
 - Started - includes Started, Determining Routes, and Routing
 - Succeeded - includes Routed (arrived files, routes and deliveries)
 - Failed - includes Failed

Leave blank to search for files with any status.

Note: For a status of Determining Routes or Started, details are not available for Routes/Deliveries or Events.

5. For **Protocol**, select from:
 - FTP
 - SFTP
 - Connect:Direct

Leave blank to search for files routed using any of the protocols, which also includes routing between mailboxes.

6. For **Original File Name**, type the full or partial name of the file the producer sent. This field is case-insensitive. File names containing the string 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 (or another limit set by your System Administrator) is displayed. The following information is provided for each arrived file:

- Reviewed
 - Status
 - Producer
 - File Name
 - Discovery Time
8. If more than 1000 files (or another limit set by your System Administrator) match your criteria, a message is displayed indicating that you have more than 1000 matches and need to narrow your search. The first 1000 files are displayed.
 9. Sort the results by clicking on any column header. Click again to change from descending order to ascending order. The default sort is by **Discovery Time**, in descending order.
 10. To search for a file with more specific criteria, click on **Advanced Search**.
 11. Select criteria in the Arrived File section from the following fields:

Field	Description
Producer	The partner who creates and sends files. Select from the list. Type the producer name to obtain unpurged data for producers who have been deleted. Leave blank to search for files from all producers.
Producer Code	The code for the producer. Select from the list. Type the producer code to obtain unpurged data for producers who have been deleted. Leave blank to search for files from all producers.
Producer Group	The group the producer is a member of. Select from the list. Type the producer group to obtain unpurged data for groups that have been deleted. Leave blank to search for files from all groups.
IP Address	The host IP address of the producer.
User	User ID of the protocol authentication.
Protocol	Select from: <ul style="list-style-type: none"> • FTP • SFTP • Connect:Direct Leave blank to search for files using all protocols, including routing between mailboxes.
Original File Name	Full or partial name of the file the producer sent. This field is case-insensitive.

Field	Description
File Size (Min) (kilobytes)	Smallest file size to search for.
File Size (Max) (kilobytes)	Largest file size to search for.
Status	<p>Select from:</p> <ul style="list-style-type: none"> • Started - includes Started, Determining Routes, and Routing • Succeeded - includes Routed (arrived files, routes and deliveries) • Failed - includes Failed <p>This is the status of the Arrived File. Leave blank to search for files with any status.</p> <hr/> <p>Note: For a status of Determining Routes or Started, details are not available for Routes/Deliveries or Events.</p>
Reviewed	<p>Select to:</p> <ul style="list-style-type: none"> • Show both reviewed and unreviewed arrived files. • Show only unreviewed arrived files. • Show only reviewed arrived files. <hr/> <p>Note: Use these options to manage your review process of file transfers.</p>
Message ID	The numeric message ID of the arrived file.
Mailbox Path	Full or partial name for the mailbox directory path of the arrived file. This field is case-insensitive.
Dataflow ID	The numeric dataflow ID for the file.
Date (From)	Click on the calendar icon to select the date to begin the search.
Date (To)	Click on the calendar icon to select the date to end the search.
Time (From)	The arrival hour, in 24-hour format, to begin the search. If the date fields are left blank, the time fields are ignored. If 0 is entered, records for all times are returned.
Time (To)	The arrival hour, in 24-hour format, to end the search. If the date fields are left blank, the time fields are ignored. If 0 is entered, records for all times are returned.

12. Select criteria in the Route section from the following fields:

Field	Description
Consumer	The partner who receives files directly or in a mailbox. Select from the list. Type the consumer name to obtain unpurged data for consumers who have been deleted. Leave blank to search for files from all consumers.
Consumer Code	The code for the consumer. Select from the list. Type the consumer code to obtain unpurged data for consumers who have been deleted. Leave blank to search for files from all consumers.

Field	Description
Consumer Group	The group the consumer is a member of. Select from the list. Type the consumer group to obtain unpurged data for groups that have been deleted. Leave blank to search for files from all groups.
Template Name	Routing Channel Template applied to the file transfer. Note: Finds files that successfully routed based on the template.
Facts	Select from: <ul style="list-style-type: none"> • ConsumerCode • ConsumerFilename • ConsumerName • ConsumerPgpExtension • ProducerCode • ProducerFilename • ProducerName Note: The list will also include any custom facts defined by the Integration Architect, with a prefix of "my".
Fact Value	Value for the fact selected above. Required when Fact is selected. This field is case-insensitive.
Status	Select from: <ul style="list-style-type: none"> • Started - includes Started, Determining Delivery, and Delivering • Succeeded - includes Complete • Failed - includes Failed This is the status of the Route. Note: For a status of Determining Routes or Started, details are not available for Routes/Deliveries or Events.

13. Select criteria in the Delivery section from the following fields:

Field	Description
IP Address	Host IP address for the delivered file. Do not use with In Mailbox specified as the protocol.
User	User ID of the protocol authentication. Do not use with In Mailbox specified as the protocol.
Protocol	Delivered file protocol. Select from: <ul style="list-style-type: none"> • FTP • Inbound FTP • Outbound FTP • SFTP • Inbound SFTP • Outbound SFTP • Connect:Direct • Inbound Connect:Direct

Field	Description
	<ul style="list-style-type: none"> • Outbound Connect:Direct • In Mailbox (for files that have not been retrieved)
Delivered File Status	Select from: <ul style="list-style-type: none"> • Started - includes Transforming, Delivering, and Redelivery • Succeeded - includes Complete • Failed - includes Failed This is the status of the delivered file.
Delivered File Name	Full or partial name of the delivered file. This field is case-insensitive.
File Size (Min) (kilobytes)	Smallest file size to search for.
File Size (Max) (kilobytes)	Largest file size to search for.
Message ID	The numeric message ID of the delivered file.
Mailbox Path	Full or partial name for the mailbox directory path of the delivered file. This field is case-insensitive.
Date (From)	Click on the calendar icon to select the date to begin the search.
Date (To)	Click on the calendar icon to select the date to end the search.
Time (From)	The delivery hour, in 24-hour format, to begin the search. If the date fields are left blank, the time fields are ignored. If 0 is entered, records for all times are returned.
Time (To)	The delivery hour, in 24-hour format, to end the search. If the date fields are left blank, the time fields are ignored. If 0 is entered, records for all times are returned.

Note: Searches using the characters _ and % (underscore and percent) may produce more results than expected, because these characters are interpreted as wildcards. Specify more characters to narrow your search, or visually search for the matches within the returned results.
