

Sterling File Gateway



# Build 5103 Updates

*Version 2.1 Build 5103*



Sterling File Gateway



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*Version 2.1 Build 5103*

**Note**

Before using this information and the product it supports, read the information in "Notices" on page 29.

This edition applies to Version 2 Release 1 of IBM Sterling File Gateway and to all subsequent releases and modifications until otherwise indicated in new editions.

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## Chapter 1. What's New in Build 5103

### New in This Release

The following enhancements are included in this release:

- Support Tool Available in Sterling B2B Integrator
- Export and Import Resource Tag Rename
- Export and Import Specific Resources
- Export and Import User Interface Changes
- Adding Custom Tabs to *myFileGateway*

### Support Tool Available in Sterling B2B Integrator

A tool to check Sterling File Gateway databases is added to Sterling B2B Integrator. Use of the tool is described in the Sterling B2B Integrator bin directory documentation. The tool is called `sfgdbcheck`.

**Attention:** Use this script only when directed by IBM support.

### Export and Import Resource Tag Rename

With Build 5103 and later, you are longer required to change the import (target system) Resource Tag before you migrate the source system Resource Tag.

See the *Migrating Sterling File Gateway Resources (Build 5103 and Higher)* documentation for more information.

### Export and Import Specific Resources

You can now export and import specific partners or communities by themselves or together.

See the *Migrate Specific Sterling File Gateway Resources (Build 5103 and Higher)* documentation for more information.

### Export and Import User Interface Changes

The export and import user interface changes include a Partner resource option. See the *Migrate Specific Sterling File Gateway Resources (Build 5103 and Higher)* documentation for more information.

### Adding Custom Tabs to *myFileGateway*

The procedure for creating additional tabs in *myFileGateway* is modified. Sample assets are now included in the installation. These sample assets can be used as the basis to create custom tabs, for example, a custom Welcome Tab.

### Error Handling in Custom Workflows

When using custom business processes to extend the capabilities of Sterling File Gateway, you can override the default error handling. Normally, for custom layers and delivery protocols, a custom business process that encounters a fault causes

processing of the associated file to fail. If `filegateway.extensionBPStatusIndicatorElement` is set to *IgnoreThisFault* and the custom business process creates an element named *IgnoreThisFault* with value "true", Sterling File Gateway disregards the fault and attempts to continue processing the arrived file or route.

## **Documentation enhancements**

Clarification in myFileGateway documentation, Sending a File from myFileGateway, that you cannot drag-and-drop, and can only send one file at a time.



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## Chapter 2. System Administrator

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### filegateway.properties

The filegateway.properties file contains properties which control the operation of Sterling File Gateway.

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

**Note:** Do not edit the filegateway.properties file. Make all changes in the customer\_overrides.properties file. For example, to change the pgpCmdline2svcname property, enter the following line into customer\_overrides.properties:

```
filegateway.pgpCmdline2svcname=CUSTOM
```

substituting CUSTOM with the name of your Command Line 2 adapter. See *Using Property Files* in the Sterling B2B Integrator 5.1 online library.

Property	Description
ignoreFilenamex	<p>Setting a regex pattern for this will cause any arrived file that matches your regex pattern to be ignored by Sterling File Gateway.</p> <p>This is useful for recognizing and ignoring temporary files sent by producers before they are renamed to the expected name. These will not be routed and are not considered failures.</p> <p>Specify one or more file name patterns to ignore in the following format:</p> <ul style="list-style-type: none"><li>• filegateway.ignoreFilename1=&lt;regex expression&gt;</li><li>• filegateway.ignoreFilename2=&lt;regex expression&gt;</li><li>• filegateway.ignoreFilename3=&lt;regex expression&gt;</li><li>• filegateway.ignoreFilenamex=&lt;regex expression&gt;</li></ul> <p>For example:</p> <pre>filegateway.ignoreFilename1=.+[.]tmp\$</pre> <p>would have the effect of ignoring all files with an extension of .tmp.</p> <p><b>Note:</b> The regex pattern must match the file name in its entirety. Partial matches are not recognized.</p>
ftpClientAdapterName	<p>The FTP Client Adapter instance or service group that the FileGatewayDeliverFTP business process will use. Override this property in customer_overrides.properties if a custom FTP Client Adapter instance must be used to contact trading partners. You can also specify an adapter group name to load-balance outbound FTP sessions across multiple adapter instances. Default is:</p> <pre>ftpClientAdapterName=FTPClientAdapter</pre>

Property	Description
bpCompletionProbes.1 bpCompletionSleepMsec.1 bpCompletionProbes.2 bpCompletionSleepMsec.2	<p>Timeouts and sleep intervals that control how long Sterling File Gateway waits for every sub-business process it invokes. These control the timeouts when a business process is executed synchronously during routing. Used for consumer identification business processes and for PGP processing. Enables one set of relatively quick probes followed by a second set of slower probes. The first set will be very reactive, but consume more processor. The second set will activate for longer-running processes and will consume less processor.</p> <p>First probe 120 times with 100 Milliseconds between, for a total of 12 seconds. Default is:            bpCompletionProbes.1=120            and bpCompletionSleepMsec.1=100</p> <p>Then probe 600 times with 2000 Milliseconds between, for a total of 1200 seconds (20 minutes). Default is:            bpCompletionProbes.2=600            and bpCompletionSleepMsec.2=2000</p>
pgpCmdline2svcname	<p>The name of the Command Line 2 adapter to be used for PGP packaging and unpackaging. Override this property in customer_overrides.properties if a custom Command Line 2 adapter must be used for PGP operations. You can also specify an adapter group name to load-balance outbound PGP sessions across multiple adapter instances. Default is:            pgpCmdline2svcname=PGPCmdlineService</p>
fgRoutePGPCmdLineSocketTimeout	<p>Timeout value, in milliseconds, for PGP package and unpackage operations invoked by Sterling File Gateway. Default value is 240000 milliseconds (4 minutes)</p>
fgRouteConcurrentSessionLimit	<p>Limits the number of File Gateway services that can be running concurrently. The services are split into two groups, and each group has this value as a limit. Therefore, there will be a maximum of two times the value of this property services running.</p> <p>It is best to set this somewhat (but not too much) higher than the number of business process threads in queues 4 and 6 (these are the queues where the File Gateway Services run.) The default is 8. To change this value, use the customer_overrides.properties file to set:            filegateway.fgRouteConcurrentSessionLimit=            (# of limit)</p>
required_si_build_ver	<p>The build number (version) of Sterling B2B Integrator that Sterling File Gateway requires. This is checked at system start up. If the current version of Sterling B2B Integrator does not equal the required_si_build_ver, a warning is issued and the system is shut down. Required. Do not change or override this property.</p>
fgmaxBroadcastListSize	<p>Maximum allowed size of the consumer list used for broadcast. If the returned list of consumers exceeds this size, the file is not routed. By default, the maximum size of a broadcast list is set to 100.</p>

Property	Description
grantIntermediateMailboxPermissions	<p>Controls permissions granted to intermediate mailboxes (those between a partner user's virtual root and the leaf mailbox). These mailboxes are created during routing channel creation or dynamic routing. Setting this property to true grants View &amp; Execute rights to the intermediate mailboxes to eligible partner users. View rights are required to list mailbox contents. Execute rights are required to 'log in' to a mailbox. Setting both rights allows users of the FTP and SFTP protocol adapters to traverse through any intermediate mailboxes to reach the leaf. The default is false.</p> <p>For example:</p> <pre>grantIntermediateMailboxPermissions=false</pre>
extensionBPStatusIndicatorElement= <i>IgnoreThisFault</i>	<p>Use in conjunction with custom business processes that extend the capabilities of Sterling File Gateway, to override its default behavior when such a business process fails. Normally, a custom business process that encounters a fault causes processing of the associated file to fail. If extensionBPStatusIndicatorElement is set to <i>IgnoreThisFault</i> and the custom business process has created an element named <i>IgnoreThisFault</i> with value "true", Sterling File Gateway will disregard the fault and attempt to continue processing the arrived file or route.</p> <p>The value <i>IgnoreThisFault</i> is suggested for the element name value, but the value can be any string that is a legal element name in XML. By default, this property is not included in filegateway.properties..</p> <p>Use the following assignment in the custom business process to set the value of the Process Data element:</p> <pre>&lt;assign name="Assign" to="IgnoreThisFault"&gt;true&lt;/assign&gt;</pre> <p>See <i>Handling Errors in Custom Business Processes</i> for how to implement.</p>

## Handling Errors in Custom Business Processes (Build 5009 and Later)

When using custom business processes to extend the capabilities of Sterling File Gateway, you can override the default error handling.

### About this task

Sterling File Gateway uses custom business processes in the following scenarios:

- Dynamic consumer identification - a custom business process identifies the consumer in each file transfer
- Custom layers - a custom business process defines how to handle a custom layer
- Delivery protocols - a custom business process implements the delivery of a file to a listening consumer

For consumer identification, the business process returns the name of the consumer in a Process Data element. If the business process does not return a valid value for the consumer name, the route will fail and the solution presented in this procedure cannot override the failure.

Normally, for custom layers and delivery protocols, a custom business process that encounters a fault causes processing of the associated file to fail. If filegateway.extensionBPStatusIndicatorElement is set to *IgnoreThisFault* and the custom business process has created an element named *IgnoreThisFault* with value

"true", Sterling File Gateway will disregard the fault and attempt to continue processing the arrived file or route. To set this property:

## Procedure

1. Stop Sterling File Gateway.
2. In the <install\_dir>/properties directory, locate customer\_overrides.properties.

**Important:** Do not edit the filegateway.properties file. Make all changes in the customer\_overrides.properties file.

3. In a text editor, open customer\_overrides.properties.
4. Add the following lines:  
filegateway.extensionBPStatusIndicatorElement=extensionBPStatusIndicatorElement  
*IgnoreThisFault* is a suggested value for extensionBPStatusIndicatorElement, but the value can be any string that is a legal element name in XML.
5. Save the customer\_overrides.properties file with the same name in the same location.
6. Restart Sterling File Gateway.
7. Use the following assignment in the custom business process to set the value of the Process Data element:

```
<onFault> : <assign name="Assign" to="extensionBPStatusIndicatorElement">true</assign> : <onFault>
```

The value of the property should match with the value of business process tied with the Dynamic Channel. The applicable values from the business process side for this property is true and false. All other values, including incorrect match of business process element with property name, default to false behavior.

8. All Sterling File Gateway custom business processes that raise faults that must be disregarded must be edited to set filegateway.extensionBPStatusIndicatorElement=IgnoreThisFault (or whatever the property value actually is) to true in the appropriate condition. If you want a business process to disregard some faults and for other faults to terminate the route; set this element when the fault must be disregarded.

## Results

If the custom business process encounters a fault, Sterling File Gateway does not immediately terminate processing the file but attempts to continue as if the business process had not encountered a fault.

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## Add Custom Tabs to *myFileGateway*

System Administrators can create new tabs for additional functionality in *myFileGateway*. This sample is meant to serve as a starting point for the creation of your own custom tabs. Please do not make your changes directly in the <install>/samples directory, as these may be overwritten in a future patch. Instead, you may maintain the WAR file in a directory entirely separate from the <install> directory, as long as the HTTP Server Adapter is configured to find it.

### About this task

With this change, every HTTP Server Adapter that hosts myfilegateway.war will also have to host sampletab.war. In particular, visiting http://<host>:<baseport>/

myfilegateway will fail unless sampletab.war is copied to <install>/noapp/deploy. If this condition hasn't been met, a request to /myfilegateway will fail to load the login page. Use the browser to visit http://<host>:<baseport>/sampletab/welcomepage.js and verify that the content of that file is shown.

One example of a custom tab you can add to *myFileGateway* is a Welcome Tab, which is supplied as a sample in the install. When creating a custom permission like the one in this example, make sure its "Permission Type" is "File Gateway". You can use these assets, which ship with the sample, as the basis for your own implementation:

- <install>/samples/filegateway/sample\_myfg\_tab/sampletab.war
- <install>/samples/filegateway/sample\_myfg\_tab/sampletab\_imports.xml.in

This procedure describes how to create a new Welcome Tab in *myFileGateway*.

## Procedure

1. Modify the <install>/properties/customer\_overrides.properties and add this line:  
filegateway\_ui.myfilegateway.extension\_js\_file\_1=/sampletab/welcomepage.js
2. Create a permission named "Custom myFileGateway Sample Tab" with the ID "CUSTOM\_MYFG\_WELCOME" and an HTTP Server Adapter instance named "myFileGatewayWithSampleTab" by selecting **Tools > B2B Console > Deployment > Resources Manager > Import/Export** and importing the file:  
<install>/samples/filegateway/sample\_myfg\_tab/sampletab\_imports.xml  
The password for the import file is "password" without the quotes. Import all three assets within the import file.
3. Modify the HTTP Server Adapter Instance by selecting **Tools > B2B Console > Services Configuration** and finding the HTTP Server Adapter that you created in the previous step. Make these modifications:
  - a. On the first page, set the Group to None.
  - b. On the second page, change the port to one that doesn't conflict with any other port on the instance.
  - c. Enable the adapter instance by clicking the "Enable Service for Business Processes" box on the confirmation page.
4. Select **Tools > B2B Console > Accounts > Groups** and verify that the "File Gateway Partner Users" group includes the permission named "Custom myFileGateway Sample Tab". Custom permissions relating to the custom tabs must be of the "File Gateway" type.
5. Restart the server:
  - a. <install\_dir>/bin/hardstop.sh
  - b. <install\_dir>/bin/run.sh
6. Login to *myFileGateway* using the port specified in Step 3 to verify that the new tab named "Custom Welcome Page" is visible. The custom tab web application may need to know the name of the user that is logged into *myFileGateway*. You can determine this by retrieving the HTTP Session attributes "dlssoAuthenticated" and "autho". If the visitor to the custom tab web application authenticated to myFileGateway, the value of the "dlssoAuthenticated" attribute will be the string "true" and the value of the "autho" attribute will be the name of the logged in user as a string.

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## Migrating Sterling File Gateway Resources (Build 5103)

You can migrate Sterling File Gateway resources from one system to another. You may have a staging system where you test new partners and other resources before you migrate them to a production system. You may also want to migrate resources from one software version to another. In general, you migrate resources two ways. The Sterling File Gateway instance includes Sterling Integrator resources, Custom Protocols, and Sterling File Gateway Communities, Partners, and Configurations. The Sterling Integrator resources and Custom Protocols do not change very often, so you usually only need to migrate them once. The Communities, Partners, and Configurations change frequently. In general, you first migrate everything in your Sterling File Gateway instance, then periodically migrate the things that change. You migrate resources using a Resource File that is an xml file that contains resources. You can use a resource tag to create the Resource File or you can individually select the resources you want when you create the Resource File.

### Resource Files and Resource Tags

There are two types of resource tags:

#### Community Resource Tag

When you create a Community in Sterling File Gateway, the user interface creates a Resource Tag with that Community name in Sterling Integrator. The Community Resource Tag contains the Community and all of its Partners. This Community Resource Tag is updated and maintained by the user interface. The Resource Tag is stored in the system so you can repeatedly create Resource Files with the same set of resources in it.

#### Custom Resource Tag

A Custom Resource Tag is one that you create. You add the resources that you want to migrate to the tag and only those resources will be in the Resource File. The Resource Tag is saved on the system so that you can use it repeatedly to create Resource Files with the same set of resources.

You could, for example, create a custom Resource Tag that has a Community and all of its Partners, and is just like the Community Resource Tag. When you create the resource file from this Custom Resource Tag it will have exactly the same resources in it as a Resource File created from the Community Resource Tag. However, this tag will not be updated by the user interface when Partners are modified, added, or removed from the Community.

Resource Tags in the system can be used repeatedly to create resource files.

### Resource Files without Resource Tags

You can create a resource file without a Resource Tag. When creating a Resource File, the system asks you if you want to use a Resource Tag or not. If you choose to not use the Resource Tag, the system lets you create a Resource File with any resources you want, just like a Custom Resource Tag. But, the list of resources you specify for the Resource File are not stored on the system for you to use repeatedly. If you create a Resource File without a Resource Tag and want to create another Resource File with those resources in it, you must remember what the resources were to recreate the Resource File.

## Migrate All of the Resources in the Sterling File Gateway Instance

When you are migrating all of the resources in Sterling File Gateway for the first time, the recommended migration order is:

1. Sterling Integrator Managed Resources
2. Custom Protocols
3. Sterling File Gateway Community, all of its Partners, and Partner Groups
4. Sterling File Gateway Configurations

## Migrate Specific Resources from the Sterling File Gateway Instance

After you have migrated all of the resources in the Sterling File Gateway instance, you only have to migrate resources that have changed. The resources that change most often are Partners. Partners belong to Communities and Partner Groups.

When you migrated all of the resources in the Sterling File Gateway instance, you migrated the Communities and Partner Groups. If you only add Partners to your instance, and no new Communities or Partner Groups, you can migrate just the Partners that you have added.

If you have added Communities or Partner Groups for the Partners, you must migrate the Communities and Partner Groups before you migrate the Partners.

## Migrate All Sterling File Gateway Resources

### Migrate Sterling Integrator Managed Resources

Sterling Integrator customized resources used by the Sterling File Gateway Community must exist on the target system before the Community is migrated. You can create these resources on the target system or you can migrate these resources to the target system.

Sterling Integrator managed resources are any resources that are not created within the Sterling File Gateway user interface. These resources are created and managed within Sterling Integrator. These might include, but are not limited to: AS2 partners, SSH profiles, SSH Authorized User Keys, certificates, Pre- and Post-process business processes, customized server adapters, etc.

You can migrate the Sterling Integrator managed resources with a Resource File that you create with a Resource Tag or by manually specifying resources for a Resource File.

### Related Tasks:

*Creating a Custom Resource Tag:*

Use this task to create a Custom Resource Tag that is used to create a Resource File to export and import resources from one system to another. Remember that this Resource Tag will not be automatically updated by the user interface when you change the Community's Partners. Only the Community Resource Tag is automatically updated by the user interface.

### About this task

This task is done on the Sterling B2B Integrator System Administrator's Console.

#### Procedure

1. On the source system, select **Deployment > Resource Manager > Resource Tags**.
2. Click Create New Resource Tag **Go!**.
3. Enter a name and description for the resource tag.
4. Select the resources that you want to include in the Resource File.
5. Select the resource components you want to include in the Resource File.
6. Select **Finish**.

*Editing a Resource Tag:*

Use this task to change the contents of an existing Resource Tag. Any new Resource Files created with this Resource Tag will differ from previous Resource Files created with this tag.

### About this task

This task is done on the Sterling B2B Integrator System Administrator's Console.

#### Procedure

1. On the source system, select **Deployment > Resource Manager > Resource Tags**.
2. Click List Alphabetically ALL **Go!**
3. Select **Edit** for the Resource Tag you want to edit.
4. Select the Resource Types that you want to include in or remove from the Resource File (for example, Communities).
5. If you are adding resources, select the individual resources you want to include in the Resource File (for example, Community 1).
6. Select **Finish**.

*Creating a Resource File with a Resource Tag:*

Use this task to create a resource file to export and import specific resources from one system to another.

### About this task

This task is done on the Sterling Integrator System Administrator's Console.

#### Procedure

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Choose **XML Document** for the type of format.
4. Choose **Yes** to use a Resource Tag.
5. Choose **Standard** export.
6. Enter and confirm a Passphrase.



7. Select **Finish**.
8. Download the Resource File to an accessible directory.

*Creating a Resource File without a Resource Tag:*

Use this task to create a Resource File to export and import specific resources from one system to another.

#### **About this task**

This task is done on the Sterling Integrator System Administrator's Console.

#### **Procedure**

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Choose **XML Document** for the type of format.
4. Choose **No** to not use a Resource Tag.
5. Choose **Standard** export.
6. Choose the resources you want to export.
7. On the Export Resources pages, use the arrow keys to select the resource components that you want to export.
8. Enter and confirm a Passphrase.
9. Select **Finish**.
10. Download the Resource File to an accessible directory.

*Exporting Resources to a Resource File:*

Use this task to create a Resource File containing resources you want to export from a source system.

#### **About this task**

This task is done on the Sterling B2B Integrator System Administrator's Console.

#### **Procedure**

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Select XML Document for the export file format.
4. Select **No** for **Do you wish to export resources based on a tag name?**
5. Select **Standard** for the type of export.
6. Select the resource types that you want to export (for example, Communities).
7. Select the individual resources that you want to export (for example Community 1).
8. Enter the Passphrase for the file. Confirm the Passphrase.
9. Select **Finish**

*Importing Resources from a Resource File:*

Use this task to import resources from a Resource File to a target system.

## About this task

This task is done on the Sterling B2B Integrator System Administrator's Console.

### Procedure

1. On the target system, select **Deployment > Resource Manager > Import/Export**.
2. Click Import Resources **Go!**.
3. Enter the filename of the export file created on the source system.
4. Enter the Passphrase for the file.
5. Select **Import All Resources**.
6. Select **Yes** to update the objects that already exist on the target system or select **No** if you do not want to update objects that already exist on the target system.
7. Select **Finish**.

## Migrate Custom Protocols

Custom Protocols are custom configurations within the system, so the migration steps and migrated resources vary between system versions and patches. Custom Protocols should be migrated to the target system before the rest of the Sterling File Gateway resources are migrated to the target system. The Custom Protocols are accessed by any Community that is configured to use the protocols. Because they can be used by Partners in all Communities on the system, the Custom Protocols should not be added to any specific Community Resource Tag. Migrating the Custom Protocols is a multistep process. Some of the files are migrated with the user interface and some are migrated outside the user interface. After all of the files are migrated, the system must be stopped, redeployed, and restarted.

### Process

To migrate Custom Protocols:

1. Use the Sterling Integrator Resource Manager to create a Resource File to migrate Custom Protocols to the target system. You can create a Resource Tag for just the Custom Protocols or create an export file. The resource file that you create must include all resources that the Custom Protocols use.
2. Export the Custom Protocols from the source system.
3. Import the Custom Protocols to the target system.
4. Copy the AFTExtensionsCustomer files from the source system to the target system.
5. Stop, redeploy, and restart the target system.

## Copy the AFTExtensionsCustomer Files from the Source to the Target

After the resources used by the Custom Protocols have been migrated to the target system through the Resource Manager, the AFTExtensionsCustomer files, located within the Sterling Integrator installation directory, must be copied and moved from the file path on the source system to the same file path on the target system. This table lists the files and the file paths:

AFTExtensionsCustomer.xml
The AFTExtensionsCustomer.xml is located in the following directory within the Sterling Integrator installation directory: <installation directory>/container/Applications/aft/WEB-INF/classes/resources/xml

<b>AFTExtensionsCustomer.properties</b>
---

The AFTExtensionsCustomer.properties is located in the following directory within the Sterling Integrator installation directory:
---

<installation directory>/container/Applications/aft/WEB-INF/classes/resources/
--

If these files contain any Custom Protocol configurations that you do not intend to migrate, you must remove the unwanted configurations from the files before you migrate them. If the target system already contains either or both of the AFTExtensionsCustomer files, then you must add the entries from the source system files to the target system files.

**Attention:** Only add completely new Customer Protocol entries to these files. If you add modified (different) versions of previously existing Custom Protocol entries or update previously existing Custom Protocol entries, it may lead to unexpected behavior.

### Stop, Redeploy, and Restart the System

After you have migrated the Custom Protocols and copied the AFTExtensionsCustomer files:

1. Stop the system.
2. Run setupfiles.
3. Run deployer.
4. Restart the system.

#### Related Tasks:

*Creating a Custom Resource Tag:*

Use this task to create a Custom Resource Tag that is used to create a Resource File to export and import resources from one system to another. Remember that this Resource Tag will not be automatically updated by the user interface when you change the Community's Partners. Only the Community Resource Tag is automatically updated by the user interface.

#### About this task

This task is done on the Sterling B2B Integrator System Administrator's Console.

#### Procedure

1. On the source system, select **Deployment > Resource Manager > Resource Tags**.
2. Click Create New Resource Tag **Go!**.
3. Enter a name and description for the resource tag.
4. Select the resources that you want to include in the Resource File.
5. Select the resource components you want to include in the Resource File.
6. Select **Finish**.

*Editing a Resource Tag:*

Use this task to change the contents of an existing Resource Tag. Any new Resource Files created with this Resource Tag will differ from previous Resource Files created with this tag.

### About this task

This task is done on the Sterling B2B Integrator System Administrator's Console.

#### Procedure

1. On the source system, select **Deployment > Resource Manager > Resource Tags**.
2. Click List Alphabetically **ALL Go!**.
3. Select **Edit** for the Resource Tag you want to edit.
4. Select the Resource Types that you want to include in or remove from the Resource File (for example, Communities).
5. If you are adding resources, select the individual resources you want to include in the Resource File (for example, Community 1).
6. Select **Finish**.

*Creating a Resource File with a Resource Tag:*

Use this task to create a resource file to export and import specific resources from one system to another.

### About this task

This task is done on the Sterling Integrator System Administrator's Console.

#### Procedure

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Choose **XML Document** for the type of format.
4. Choose **Yes** to use a Resource Tag.
5. Choose **Standard** export.
6. Enter and confirm a Passphrase.
7. Select **Finish**.
8. Download the Resource File to an accessible directory.

*Creating a Resource File without a Resource Tag:*

Use this task to create a Resource File to export and import specific resources from one system to another.

### About this task

This task is done on the Sterling Integrator System Administrator's Console.

#### Procedure

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Choose **XML Document** for the type of format.
4. Choose **No** to not use a Resource Tag.
5. Choose **Standard** export.

6. Choose the resources you want to export.
7. On the Export Resources pages, use the arrow keys to select the resource components that you want to export.
8. Enter and confirm a Passphrase.
9. Select **Finish**.
10. Download the Resource File to an accessible directory.

*Exporting Resources to a Resource File:*

Use this task to create a Resource File containing resources you want to export from a source system.

**About this task**

This task is done on the Sterling B2B Integrator System Administrator's Console.

**Procedure**

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**
3. Select XML Document for the export file format.
4. Select **No** for **Do you wish to export resources based on a tag name?**
5. Select **Standard** for the type of export.
6. Select the resource types that you want to export (for example, Communities).
7. Select the individual resources that you want to export (for example Community 1).
8. Enter the Passphrase for the file. Confirm the Passphrase.
9. Select **Finish**

*Importing Resources from a Resource File:*

Use this task to import resources from a Resource File to a target system.

**About this task**

This task is done on the Sterling B2B Integrator System Administrator's Console.

**Procedure**

1. On the target system, select **Deployment > Resource Manager > Import/Export**.
2. Click Import Resources **Go!**
3. Enter the filename of the export file created on the source system.
4. Enter the Passphrase for the file.
5. Select **Import All Resources**.
6. Select **Yes** to update the objects that already exist on the target system or select **No** if you do not want to update objects that already exist on the target system.
7. Select **Finish**.

## Migrate Communities and all of Their Partners with the Sterling File Gateway Community Resource Tag

Note: This topic was updated for Build 5103. If you have Build 5103, search for the topic *Migrate Communities, Partner Groups, and Partners with the Sterling File Gateway Community Resource Tag (Build 5103)*. After you migrate Custom Protocols, you can migrate the Sterling File Gateway Communities and Partners. The Community Resource Tag maintained by the user interface only contains the Community and all of its Partners. You must migrate the entire Community and all of its Partners.

### Process

To use the Community Resource Tag to migrate the Community and all of its Partners:

1. Use the Community Resource Tag to create a Resource File that contains the Community and all of its Partners.
2. Check the Export Log to be sure there are no errors in the Resource File.
3. Copy the Resource File to an accessible directory.
4. Import the Resource File on the target system.

### Guidelines for Using Community Resource Tag

The guidelines for migrating a Sterling File Gateway community include:

System	Guidelines and Requirements
Community Management with the Community Resource Tag	<p>When you use the Sterling File Gateway Community Resource Tag:</p> <ul style="list-style-type: none"><li>• You need to export and import all resources in that tag.</li><li>• You cannot specify individual partners to import to the target system. With the Community Resource Tag you automatically export and import all Partners in the Community.</li><li>• You can only use a single source system in the migration path. The Sterling File Gateway Community on the target system cannot be updated with communities from multiple Sterling File Gateway source systems.</li></ul>
Community Resource Tag	<p>The Community Resource Tag is managed by the Sterling File Gateway user interface and is updated when Community and Partner additions or updates are made.</p> <ul style="list-style-type: none"><li>• Never delete the Resource Tag itself. Recreating a Sterling File Gateway Community Resource Tag requires contacting customer support.</li><li>• Never remove Partners from a Community Resource Tag. If you must remove a Partner, delete the Partner from the Community using the Sterling File Gateway user interface. This automatically removes the Partner from the Community Resource Tag. During an import where you removed a Partner from the source system, the import will not remove the Partner from the target system Community or the target system Resource Tag. After the migration, you must manually remove the Partner from the Community on the target system.</li></ul>

Sterling Integrator Resources	<p>All Sterling Integrator customized resources used by, or available to, the Sterling File Gateway Community must exist on the target system before the Community is migrated. You can either migrate these customized resources to the target system or create the resources new on the target system. Do NOT add these resources to the Sterling File Gateway Community Resource Tag.</p> <p>If you migrate these Sterling Integrator resources, you can either migrate them by adding them to a Custom Resource Tag or by manually creating the Resource File.</p>
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## Resource File Export

No matter how you create the Resource File, you should always examine the Export Report after generating the Resource File. Verify that no errors were generated before you continue with the migration. If errors were generated in the Export Report, contact customer support to open a case. You should provide the Export Report and the Resource File generated.

## Resource File Import

All resources within the Resource File must be imported. All resources within the Resource File are required for the import to be successful, even if you are doing a migration to insert new resources into the target system's Community and not changing any existing resources. The Import All Resources option automatically selects all resources in the resource file for importing. It is recommended that you always use the Import All Resources option. If you do not use this option, you will be prompted to manually select all of the resources to import for each resource type.

During the import you are asked **Some objects being imported may exist in the system. Do you wish to update them?** You can set this option to either **Yes** or **No**. When you are migrating Communities for the first time, you should set this to **Yes**.

Be careful when setting this to **Yes** because the Resource File being imported represents many resources within a Sterling File Gateway Community where all of the resources must participate in the import process. Also, there may be planned differences in configuration for some resources between the source and target systems. For example, the Partner User passwords may differ between the source and target systems.

Always examine the Import Report and verify that no errors were generated. If errors were generated, contact customer support to open a case and provide the Import Report and the Resource File used.

### Related Tasks:

#### *Creating a Custom Resource Tag:*

Use this task to create a Custom Resource Tag that is used to create a Resource File to export and import resources from one system to another. Remember that this Resource Tag will not be automatically updated by the user interface when you change the Community's Partners. Only the Community Resource Tag is automatically updated by the user interface.

### About this task

This task is done on the Sterling B2B Integrator System Administrator's Console.

#### Procedure

1. On the source system, select **Deployment > Resource Manager > Resource Tags**.
2. Click Create New Resource Tag **Go!**.
3. Enter a name and description for the resource tag.
4. Select the resources that you want to include in the Resource File.
5. Select the resource components you want to include in the Resource File.
6. Select **Finish**.

#### *Editing a Resource Tag:*

Use this task to change the contents of an existing Resource Tag. Any new Resource Files created with this Resource Tag will differ from previous Resource Files created with this tag.

### About this task

This task is done on the Sterling B2B Integrator System Administrator's Console.

#### Procedure

1. On the source system, select **Deployment > Resource Manager > Resource Tags**.
2. Click List Alphabetically ALL **Go!**
3. Select **Edit** for the Resource Tag you want to edit.
4. Select the Resource Types that you want to include in or remove from the Resource File (for example, Communities).
5. If you are adding resources, select the individual resources you want to include in the Resource File (for example, Community 1).
6. Select **Finish**.

#### *Creating a Resource File with a Resource Tag:*

Use this task to create a resource file to export and import specific resources from one system to another.

### About this task

This task is done on the Sterling Integrator System Administrator's Console.

#### Procedure

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Choose **XML Document** for the type of format.
4. Choose **Yes** to use a Resource Tag.
5. Choose **Standard** export.
6. Enter and confirm a Passphrase.



7. Select **Finish**.
8. Download the Resource File to an accessible directory.

*Creating a Resource File without a Resource Tag:*

Use this task to create a Resource File to export and import specific resources from one system to another.

#### **About this task**

This task is done on the Sterling Integrator System Administrator's Console.

#### **Procedure**

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Choose **XML Document** for the type of format.
4. Choose **No** to not use a Resource Tag.
5. Choose **Standard** export.
6. Choose the resources you want to export.
7. On the Export Resources pages, use the arrow keys to select the resource components that you want to export.
8. Enter and confirm a Passphrase.
9. Select **Finish**.
10. Download the Resource File to an accessible directory.

*Exporting Resources to a Resource File:*

Use this task to create a Resource File containing resources you want to export from a source system.

#### **About this task**

This task is done on the Sterling B2B Integrator System Administrator's Console.

#### **Procedure**

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Select XML Document for the export file format.
4. Select **No** for **Do you wish to export resources based on a tag name?**
5. Select **Standard** for the type of export.
6. Select the resource types that you want to export (for example, Communities).
7. Select the individual resources that you want to export (for example Community 1).
8. Enter the Passphrase for the file. Confirm the Passphrase.
9. Select **Finish**

*Importing Resources from a Resource File:*

Use this task to import resources from a Resource File to a target system.

## About this task

This task is done on the Sterling B2B Integrator System Administrator's Console.

### Procedure

1. On the target system, select **Deployment > Resource Manager > Import/Export**.
2. Click Import Resources **Go!**.
3. Enter the filename of the export file created on the source system.
4. Enter the Passphrase for the file.
5. Select **Import All Resources**.
6. Select **Yes** to update the objects that already exist on the target system or select **No** if you do not want to update objects that already exist on the target system.
7. Select **Finish**.

## Migrate Sterling File Gateway Configurations

Note: This topic was updated for Build 5103. If you have Build 5103, search for the topic *Migrate Sterling File Gateway Configurations (Build 5103)*. You migrate Partner Groups and other Sterling File Gateway Configurations, including Consumer Custom File Layers, Producer Custom File Layers, Routing Channels, Routing Channel Templates. You can use import to create and update Partner Groups on the target system. You can also add the Partner Groups to the Community Resource Tag so that they are migrated with the Communities and Partners. You can use import to create the Consumer Custom File Layers, Producer Custom File Layers, Routing Channels, Routing Channel Templates resources on the target system, but you can not use import to update them. If you want to update these resources with an import, you must first delete them on the target system. Do not add these Sterling File Gateway Configuration to the Community Resource Tag.

### Process

You should migrate the Sterling File Gateway configurations in this order:

1. Partner Groups
2. Consumer Custom File Layers, Producer Custom File Layers, Routing Channels, Routing Channel Templates

### Partner Groups

To migrate just the Partner Groups:

1. Use the Sterling Integrator Resource Manager to create a Resource File to migrate the Partner Groups to the target system.
2. Check the Export Report for errors.
3. Import the Resource File on the target system. If a Partner Group with the same name already exists on the target system, select **Yes** for the **Some objects being imported may exist in the system. Do you wish to update them?** option. You must set this to **Yes** or the selected Partner Groups will not be updated on the target system.
4. Check the Import Report for errors.

## Consumer Custom File Layers, Producer Custom File Layers, Routing Channels, Routing Channel Templates

You can only use import to create these resources on the target system. Importing these resources will not update them on the target system, even if you select **Yes** for the **Some objects being imported may exist in the system. Do you wish to update them?** option. If you want to use import to update these resources on the target system, you must first remove the resources from the target system. Then you can use import to create the resources on the target system.

To migrate just the Consumer Custom File Layers, Producer Custom File Layers, Routing Channels, Routing Channel Templates:

1. Use the Sterling Integrator Resource Manager to create a Resource File to migrate the Consumer Custom File Layers, Producer Custom File Layers, Routing Channels, or Routing Channel Templates to the target system.
2. Check the Export Report for errors.
3. Import the Resource File on the target system.
4. Check the Import Report for errors.

### Related Tasks:

*Creating a Custom Resource Tag:*

Use this task to create a Custom Resource Tag that is used to create a Resource File to export and import resources from one system to another. Remember that this Resource Tag will not be automatically updated by the user interface when you change the Community's Partners. Only the Community Resource Tag is automatically updated by the user interface.

### About this task

This task is done on the Sterling B2B Integrator System Administrator's Console.

### Procedure

1. On the source system, select **Deployment > Resource Manager > Resource Tags**.
2. Click **Create New Resource Tag Go!**
3. Enter a name and description for the resource tag.
4. Select the resources that you want to include in the Resource File.
5. Select the resource components you want to include in the Resource File.
6. Select **Finish**.

*Editing a Resource Tag:*

Use this task to change the contents of an existing Resource Tag. Any new Resource Files created with this Resource Tag will differ from previous Resource Files created with this tag.

### About this task

This task is done on the Sterling B2B Integrator System Administrator's Console.

### Procedure

1. On the source system, select **Deployment > Resource Manager > Resource Tags**.
2. Click List Alphabetically **ALL Go!**.
3. Select **Edit** for the Resource Tag you want to edit.
4. Select the Resource Types that you want to include in or remove from the Resource File (for example, Communities).
5. If you are adding resources, select the individual resources you want to include in the Resource File (for example, Community 1).
6. Select **Finish**.

*Creating a Resource File with a Resource Tag:*

Use this task to create a resource file to export and import specific resources from one system to another.

### About this task

This task is done on the Sterling Integrator System Administrator's Console.

### Procedure

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Choose **XML Document** for the type of format.
4. Choose **Yes** to use a Resource Tag.
5. Choose **Standard** export.
6. Enter and confirm a Passphrase.
7. Select **Finish**.
8. Download the Resource File to an accessible directory.

*Creating a Resource File without a Resource Tag:*

Use this task to create a Resource File to export and import specific resources from one system to another.

### About this task

This task is done on the Sterling Integrator System Administrator's Console.

### Procedure

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Choose **XML Document** for the type of format.
4. Choose **No** to not use a Resource Tag.
5. Choose **Standard** export.
6. Choose the resources you want to export.
7. On the Export Resources pages, use the arrow keys to select the resource components that you want to export.
8. Enter and confirm a Passphrase.

9. Select **Finish**.
10. Download the Resource File to an accessible directory.

#### *Exporting Resources to a Resource File:*

Use this task to create a Resource File containing resources you want to export from a source system.

#### **About this task**

This task is done on the Sterling B2B Integrator System Administrator's Console.

#### **Procedure**

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Select XML Document for the export file format.
4. Select **No** for **Do you wish to export resources based on a tag name?**
5. Select **Standard** for the type of export.
6. Select the resource types that you want to export (for example, Communities).
7. Select the individual resources that you want to export (for example Community 1).
8. Enter the Passphrase for the file. Confirm the Passphrase.
9. Select **Finish**

#### *Importing Resources from a Resource File:*

Use this task to import resources from a Resource File to a target system.

#### **About this task**

This task is done on the Sterling B2B Integrator System Administrator's Console.

#### **Procedure**

1. On the target system, select **Deployment > Resource Manager > Import/Export**.
2. Click Import Resources **Go!**.
3. Enter the filename of the export file created on the source system.
4. Enter the Passphrase for the file.
5. Select **Import All Resources**.
6. Select **Yes** to update the objects that already exist on the target system or select **No** if you do not want to update objects that already exist on the target system.
7. Select **Finish**.

## **Migrate Specific Sterling File Gateway Resources**

### **Independently Migrate Sterling File Gateway Resources**

After you have initially migrated your Sterling File Gateway resources to a production system, you only need to migrate resources that have changed. The resources that change most often are Partners. With Partner changes you may have Community and Partner Groups changes as well as Routing Channel changes. You use the System Administrator's user interface on Sterling Integrator to select the

specific resources that you want to export from one system to another. You only need to migrate resources that are not already on the target system or that need to be updated on the target system. If the Community and Partner Groups that the Partners belong to already exist on the target system, you only need to migrate the Partners. If the Community or Partner Groups do not exist on the target system, you should migrate them with the Partners.

The user interface lets you specify specific partners to export and lets you select one or more communities to export:

Partner	Sterling File Gateway Partners are part of the Sterling File Gateway Configurations. When you create an export file with File Gateway Configurations, you can select Partners as a resource to export and then specify which partners you want to export.
Community	Communities are selected from the top level export page. When you create an export file and you select Communities, you can specify one or more Community to include in the export file.

You can specify the Partners and Communities that you want to export from one system to another. There are some constraints on what resources must exist on the target system and what resources must be imported with the Partner or Community.

The import process for migrating Partners and Communities without using the Community Resource Tag has these constraints:

WHEN importing a . . .	IF the . . .	THEN . . .
Partner(s)	Community for the Partner(s) does not already exist on the target system	The import will fail. If this happens, create or import the necessary Community on the target system then repeat the Partner(s) import.
Partner(s)	Sterling File Gateway Partner Group for the Partner(s) does not already exist on the target system	The Partner(s) will be imported with a warning in the Import Report that says the Sterling File Gateway Partner Group(s) could not be found. If this happens, create or import the necessary Partner Groups on the target system then repeat the Partner(s) import. When you redo the Partner import(s), you must select <b>Yes for Some objects being imported may exist in the system. Do you wish to update them?</b> to add the Partner(s) to the Partner groups you created on the target system.
Partner(s)	Export file contains one or more Partners	You must import everything in the export file to ensure that all dependent objects that the Partner needs are included in the import.

WHEN importing a . . .	IF the . . .	THEN . . .
Community	Export file contains one or more Communities	You must import all resources in the export file to ensure that all dependent objects that the Community needs are included in the import.
Partner Groups	Partner Groups contain new Partners for Partner Groups that are already on the target system	You should select <b>Yes</b> for <b>Some objects being imported may exist in the system. Do you wish to update them?</b> to add the new Partners to the Partner Groups that exist on the target system.
Consumer Customer File Layers, Producer Customer File Layers, Routing Channels, Routing Channel Templates	Consumer Customer File Layers, Producer Customer File Layers, Routing Channels, Routing Channel Templates already exist on the target system	You should delete the existing Consumer Customer File Layers, Producer Customer File Layers, Routing Channels, Routing Channel Templates from the target system before you do the import. These Resources can not be updated. They can only be created. Selecting <b>Yes</b> for <b>Some objects being imported may exist in the system. Do you wish to update them?</b> does not update these resources.

### Related Tasks:

#### *Creating a Custom Resource Tag:*

Use this task to create a Custom Resource Tag that is used to create a Resource File to export and import resources from one system to another. Remember that this Resource Tag will not be automatically updated by the user interface when you change the Community's Partners. Only the Community Resource Tag is automatically updated by the user interface.

### About this task

This task is done on the Sterling B2B Integrator System Administrator's Console.

### Procedure

1. On the source system, select **Deployment > Resource Manager > Resource Tags**.
2. Click Create New Resource Tag **Go!**.
3. Enter a name and description for the resource tag.
4. Select the resources that you want to include in the Resource File.
5. Select the resource components you want to include in the Resource File.
6. Select **Finish**.

### *Editing a Resource Tag:*

Use this task to change the contents of an existing Resource Tag. Any new Resource Files created with this Resource Tag will differ from previous Resource Files created with this tag.

#### **About this task**

This task is done on the Sterling B2B Integrator System Administrator's Console.

#### **Procedure**

1. On the source system, select **Deployment > Resource Manager > Resource Tags**.
2. Click List Alphabetically **ALL Go!**.
3. Select **Edit** for the Resource Tag you want to edit.
4. Select the Resource Types that you want to include in or remove from the Resource File (for example, Communities).
5. If you are adding resources, select the individual resources you want to include in the Resource File (for example, Community 1).
6. Select **Finish**.

### *Creating a Resource File with a Resource Tag:*

Use this task to create a resource file to export and import specific resources from one system to another.

#### **About this task**

This task is done on the Sterling Integrator System Administrator's Console.

#### **Procedure**

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Choose **XML Document** for the type of format.
4. Choose **Yes** to use a Resource Tag.
5. Choose **Standard** export.
6. Enter and confirm a Passphrase.
7. Select **Finish**.
8. Download the Resource File to an accessible directory.

### *Creating a Resource File without a Resource Tag:*

Use this task to create a Resource File to export and import specific resources from one system to another.

#### **About this task**

This task is done on the Sterling Integrator System Administrator's Console.



### Procedure

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Choose **XML Document** for the type of format.
4. Choose **No** to not use a Resource Tag.
5. Choose **Standard** export.
6. Choose the resources you want to export.
7. On the Export Resources pages, use the arrow keys to select the resource components that you want to export.
8. Enter and confirm a Passphrase.
9. Select **Finish**.
10. Download the Resource File to an accessible directory.

#### *Exporting Resources to a Resource File:*

Use this task to create a Resource File containing resources you want to export from a source system.

#### **About this task**

This task is done on the Sterling B2B Integrator System Administrator's Console.

### Procedure

1. On the source system, select **Deployment > Resource Manager > Import/Export**.
2. Click Export Resources **Go!**.
3. Select XML Document for the export file format.
4. Select **No** for **Do you wish to export resources based on a tag name?**
5. Select **Standard** for the type of export.
6. Select the resource types that you want to export (for example, Communities).
7. Select the individual resources that you want to export (for example Community 1).
8. Enter the Passphrase for the file. Confirm the Passphrase.
9. Select **Finish**

#### *Importing Resources from a Resource File:*

Use this task to import resources from a Resource File to a target system.

#### **About this task**

This task is done on the Sterling B2B Integrator System Administrator's Console.

### Procedure

1. On the target system, select **Deployment > Resource Manager > Import/Export**.
2. Click Import Resources **Go!**.
3. Enter the filename of the export file created on the source system.
4. Enter the Passphrase for the file.

5. Select **Import All Resources**.
6. Select **Yes** to update the objects that already exist on the target system or select **No** if you do not want to update objects that already exist on the target system.
7. Select **Finish**.

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