webMethods ActiveTransfer Web Client User's Guide

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WEBMETHODS

This document applies to webMethods ActiveTransfer 10.15 and to all subsequent releases.

Specifications contained herein are subject to change and these changes will be reported in subsequent release notes or new editions.

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About this Guide

webMethods ActiveTransfer Web Client User's Guide describes how to use webMethods ActiveTransfer web client to view and manage the files and folders in the ActiveTransfer Server instance to which you have been granted access privileges. ActiveTransfer web client supports HTTP and HTTPS transfer protocols only.

Important:
If you have a lower fix level of webMethods ActiveTransfer installed, some of the features described in *webMethods ActiveTransfer Web Client User's Guide* might not be available to you. For a cumulative list of fixes and features, see the latest fix readme on the Empower website at https://empower.softwareag.com.

Document Conventions

Convention	Description
Bold	Identifies elements on a screen.
Narrowfont	Identifies service names and locations in the format *folder.subfolder.service*, APIs, Java classes, methods, properties.
Italic	Identifies: Variables for which you must supply values specific to your own situation or environment. New terms the first time they occur in the text. References to other documentation sources.
`Monospace font`	Identifies: Text you must type in. Messages displayed by the system. Program code.
{ }	Indicates a set of choices from which you must choose one. Type only the information inside the curly braces. Do not type the { } symbols.
|	Separates two mutually exclusive choices in a syntax line. Type one of these choices. Do not type the | symbol.
[ ]	Indicates one or more options. Type only the information inside the square brackets. Do not type the [ ] symbols.
...	Indicates that you can type multiple options of the same type. Type only the information. Do not type the ellipsis (...).

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1 Understanding ActiveTransfer Web Client

Overview of ActiveTransfer Web Client

ActiveTransfer provides an in-built web client that you can use to view and manage the files and folders in the ActiveTransfer Server instance to which you have been granted access privileges.

You can use the ActiveTransfer web client to access the ActiveTransfer Server and perform the following tasks based on the access rights:

- Create new folders.
- Download files and folders.
- Change user options.
- Upload files.
- Cut, copy, and paste files.
- Share files and folders.
- Add files and folders to a basket.
- Copy the link to a file and paste it into an email.

Note: ActiveTransfer web client supports HTTP and HTTPS transfer protocols only.

2 Preparing to Work with ActiveTransfer Web Client

Overview

To use the ActiveTransfer web client, you must first log in using the ActiveTransfer Server instance URL and your user credentials. The email you received from the ActiveTransfer administrator when your account was created contains the information you need to log in to the ActiveTransfer web client.

The web client starts and displays the files and folders on the ActiveTransfer Server that you can work with. The options available on the menu bar and context menu are defined by the ActiveTransfer Server permissions granted to you by the administrator.

Important:
If you do not have permission for an activity assigned to your user account, the controls and menu commands will not be available to you. Consult your ActiveTransfer administrator for additional permissions.

Accessing ActiveTransfer Web Client

Ensure that you have an email that contains the user name, password, and web client URL to access from your ActiveTransfer administrator.

You can access ActiveTransfer web client using single sign-on (SSO) through Single Assertion Markup Language (SAML). SSO is supported only for HTTPS protocol.

1. Click the web client URL provided in the email.

   The ActiveTransfer web client login page appears.

2. In the login dialog box, type your credentials and click **Login**.

   Note:
   To bypass SSO login to an HTTPS port, type the URL with nosso. For example, `https://servername:port/nosso`. You can also choose to login using your user name and password in your next login.

   Your request is redirected to the identity provider (such as Okta, ADFS, OpenID and so on) supported by your organization for authentication. On successful authentication of your credentials, you can access the ActiveTransfer web client pages directly without providing your credentials during the next login.

3. To log out of the web client, click **Logout**.

Configuring Language Settings for Web Client

ActiveTransfer supports the localization of the web client user interface.

Note:

- In Chrome and Firefox web browsers, the language settings on the web browser dictates the preferred language after you log out and log into ActiveTransfer web client.
- In Microsoft Edge web browser, the language settings on your computer dictates the preferred language after you log out and log into ActiveTransfer web client.

To configure your preferred language

1. Login to ActiveTransfer web client.
2. On the top-right corner of the page, select your preferred language from the list.

The user interface is automatically refreshed to reflect the new language settings.

Rebranding the ActiveTransfer Web Client

You can rebrand the web client interface by modifying the files located in the *Integration Server_directory* \instances\ *instance_name* \packages\WmMFT\resources\WebInterface\ folder. For example, if you want to display your company logo on the web client interface, replace the following files in `WebInterface\images\` folder with your company logo.

- logo.png
- powered_by.png

You can also use custom JavaScripts and CSS to further change the look and feel of the web page when it loads. You can achieve this by modifying the following files in the `WebInterface` folder:

- custom.css
- custom.js
- custom_login.css

Important:
Do not rename the files.

3 Working with Folders and Files

Overview

Creating a New Folder

You can create a folder at the top level or inside any folder, and use the new folder to organize files you upload and download.

To create a folder

1. In the web client, do one of the following:
   - To create a folder at the top level, click **Create folder**.
   - To create a folder inside another folder, select the folder and click **Create folder**.
2. In the **Create folder** dialog box, enter a name for the folder.
3. If you want to navigate to the new folder immediately after you create it, select **Navigate to the folder after creation**.
4. Click **Create**.

Downloading Files and Folders

You can download a file or all files in a folder from ActiveTransfer Server to your computer using the web client.

To download a file or folder

1. In the web client, right-click the file or folder you want to download.
2. From the pop-up menu, select one of the following options:

Select this option...	To...
Download	Download the file or folder without compression. Choose this option for small to medium sized files.
ZipDownload	Compress the file or folder in a zip archive before downloading it. Choose this option for large files or when retrieving an entire folder at one time to save on bandwidth.

3. If you selected **Download** or **ZipDownload**, you are prompted as to how to process the download. The exact mechanism will vary depending on your browser. In most cases, you

can open the file, or you can save the file or folder to your local file system and open it from there. You can rename the file before saving it.

Changing User Options

You can change your ActiveTransfer user options using the web client.

To change your ActiveTransfer web client user options

1. In the web client, click **User preferences** on the toolbar.
2. In the **Preferences** box, set your user options as desired:
   a. To hide files or folders starting with a '.', select **Hide items starting with '.'**.
   b. To hide the check box column next to each file and folder listed in the web client, select **Hide checkbox column**.
   c. To automatically start the upload process when you select a file or folder to upload, select **Auto upload**.
3. Close the **Preferences** box to save your settings.

Uploading Files and Folders

You can upload files and folders from your local file system to the ActiveTransfer Server using the web client.

To upload a file or folder

1. In the web client, browse to the folder on the ActiveTransfer Server where you want to upload the file or folder.
2. Click **Upload**.
3. In the file system window, browse to and select the file or folder on your local file system to upload. To select multiple files, use Ctrl-click to select each one.
4. In the **Files to upload** window, the file you selected is listed. Click **Add files** to add additional files to upload.
5. To upload the files, use one of the following methods:
   - To upload the file or folder without compression, click the **Start** icon next to the file or click **Start upload** to upload all the files.

6. Close the **Files to upload** window when you are done uploading files.

Cutting, Copying, Pasting, Renaming, and Deleting Folders and Files

You can cut, copy, paste, rename, and delete folders or files on ActiveTransfer Server.

To cut, copy, paste, rename, or delete folders or files

1. In the web client, right-click the folder or file that you want to cut, copy, paste, rename, or delete.

2. Click **Cut**, or **Copy**, or **Paste**, or **Rename**, or **Delete** as appropriate.

   Note:
   If you login to ActiveTransfer Web Client using ActiveTransfer Gateway, then the **Cut**, **Copy**, and **Paste** options will not be available.

3. If you are renaming a file or folder, type the new name for the file or folder when prompted.

4. Click **Save**.

Adding Files and Folders to the Basket

The ActiveTransfer web client uses the concept of a basket where you can place files or folders on which you want to perform some future action, such as downloading them or sharing them as a group.

To add files or folders to a basket

1. In the web client, select the check box next to the files or folders that you want to add to a basket.

2. Click the **Add to basket** button on the tool bar.

   The **Files in the basket** dialog shows the items that were added to the basket. It also enables you to download the contents of the basket.

Viewing contents of the Basket

As you add files and folders to the basket, check the contents and make sure the basket is organized.

To view the contents of the basket

1. In the web client, click the **Show basket** button on the tool bar.

2. You can filter the list of items in the basket, and choose to download them. When downloading the items, select the **Resume** check box to have any interrupted downloads resume automatically.

3. To delete the items in the basket, click the **x** next to the item.

Copying the Folder Link

You can copy a folder link and use the link in an email with instructions to download or upload the files.

To copy an ActiveTransfer Server folder link

1. In the web client, right-click the folder.

2. Click **Copy link**.

3. Copy the link from the **Copy direct link** dialog box and paste it into an email.

4 Sharing Files and Folders

Overview

You can share files and folders on ActiveTransfer Server with users using the web client. ActiveTransfer Server creates temporary credentials for the users to access shared files and folders.

Sharing Files and Folders

When sharing files or folders, you create an email message to send to the recipients of the file share. The email contains a link to the shared item, the date when the link expires, and the user credentials to access the shared item.

The fields in this screen display default values configured by the administrator. If the administrator has disabled modification, your file share options are restricted to the default values.

Sharing is possible from both ActiveTransfer Server and ActiveTransfer Gateway. When you share an item from ActiveTransfer Gateway, the shared item link includes the configured ActiveTransfer Gateway details (machine IP or machine name and port) as configured by the administrator.

To share a file or folder

1. In the web client, select the check box for the file or folder that you want to share.
2. Click **Share** on the tool bar at the top of the page.

   The Share dialog box appears. The **Sharing** field at the top of this dialog box displays the files or folder selected for sharing.
3. If you are sharing only a single file and want the user to directly view the file on clicking the file link in the file share email, select **Direct link**.
4. In the **Type** field, select how to the share the selected items.

Option	Description
Copy	Makes a copy of the original shared item and stores it in a temporary storage location. If the original item is deleted, the link still works. When the link expires, the item is deleted from the temporary storage location.
Reference	Creates a pointer to the original shared item. Therefore, any change the file share recipient makes will be to the original file. A reference is like an alias, and as long as its name stays the same, users will be able to access the item. Changing the name of the original item breaks the link because the reference is pointing to the original item, and changing the name affects the shared item.

Option	Description
Move	Moves the original shared file to a temporary storage location. When the link expires, the original file is deleted from the temporary storage.

5. Specify if you want to send an email to let recipients know about the shared item:
   - If you want to send an email, retain the default selection of **Send email**. All the file share recipients receive a message regarding the shared item.
   - If you do not want to send an email, clear the **Send email** selection.
6. In the **Expires** field, follow these steps:
   a. In **Days**, type the number of days for which you want the item to be accessible to the file share recipient. The field to the right displays the effective share expiry date based on the number days specified.
   b. In the time field, specify the exact time (24-hour format *hh*:*mm*) when the share expires.
7. If you are sending an email, complete the **From**, **To**, **CC**, **BCC**, **Subject**, and **Body** fields as required.

   In the **To**, **CC**, and **BCC**fields, you can include multiple email IDs separated by commas.
8. In **Permissions**, select the relevant access permissions for the shared item: **View**, **Download**, **Upload**, **Delete**, **Rename**, **Create Folder**, **Delete Folder**.

   Note:
   View and **Download** permissions are selected by default. Retain these selections to enable other access permissions.
9. Click **Send** to send an email about the shared items.