

# webMethods ActiveTransfer Quick Start Guide

This document applies to all webMethods ActiveTransfer versions.

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

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# Simple SFTP File Upload

## SERVER MANAGEMENT

In My webMethods, set up ...



### 1. SFTP port

### 2. User account

### 3. Virtual file system (or folder):

- Partner
- File transfer location
- File transfer protocol
- Add user & access permissions

## Trigger SFTP File Upload

From any SFTP Client ...



### 1. Log in as user created in My webMethods.

### 2. Upload file:

- > Add files...
- > Select file to upload
- > Start

### 3. Verify success of file upload.

In My webMethods ...



### 4. Integration > Managed File Transfer > File Transactions

### 6. Verify file action and details:

- > Filter and find uploaded file.
- > Check file details in Detail tab.

# SFTP File Upload and Post-Processing

## SERVER MANAGEMENT

In My webMethods, set up ...



- 1. SFTP port**
- 2. User account**
- 3. Virtual file system:**
  - Partner
  - File transfer location
  - File transfer protocol
  - Add user & access permissions

In My webMethods, set up a post-processing event...



**Integration > Managed File Transfer > Event Management > Post-Processing Events:**

- 4. Event trigger** (after upload)
- 5. Post-processing action**
- 6. Error action for post-processing/action failure**

## SFTP File Upload

From any SFTP Client ...



**7. Log in as user created in My webMethods.**

**8. Upload file:**

- > Add files...
- > Select file to upload
- > Start

**9. Verify success of file upload.**

In My webMethods ...



**10. Integration > Managed File Transfer > File Transactions**

**11. Verify file action and details:**

- > Filter and find uploaded file.
- > Check file details in Tansaction tab.
- > Verify if processing is done correctly in Activities sub-tab.

# Schedule a File Transfer

Download from a partner SFTP server every 30 minutes past every hour

## SERVER MANAGEMENT

In My webMethods, set up...



**1. SFTP port**

**2. User account**

**3. Virtual file system:**

- Partner
- File transfer location
- File transfer protocol
- Add user & access permissions

In My webMethods, set up a scheduled event ...



**Integration > Managed File Transfer > Event Management > Scheduled Events,:**

**4. Create a Scheduled event.**

(frequency, date range)

**5. Add Scheduled actions in event.**

(find files + process + copy to archive)

## Test scheduled event

In My webMethods...



**Integration > Managed File Transfer > Event Management > Event Log:**

**6. Select your scheduled event.**

**7. Verify event execution details.**

**8. Verify file actions:**

- Check if the files are downloaded.
- Check if the files are processed.
- Check if the files are archived.

# Event-Driven File Transfer

Upload files to a partner SFTP server when a file is available in ActiveTransfer VFS

## SERVER MANAGEMENT



In My webMethods, set up ...



### 1. SFTP port

### 2. User account

### 3. Virtual file system:

- Partner
- File transfer location
- File transfer protocol
- Add user & access permissions

In My webMethods, set up a scheduled event ...



**Integration > Managed File Transfer > Event Management > Scheduled Events:**

### 4. Create a Scheduled event.

(Execution actions - Manual, which automatically triggers the ActiveTransfer API `wm.mft.schedule:executeEvent API`.)

### 5. Add Scheduled actions in event.

(Find files on local directory + upload to remote partner server)

## Run ActiveTransfer API



In webMethods Designer, run the API...



**Package Navigator > WmMFT > WM > executeEvent:**

### 6. Define parameters for executeEvent.

(name and value pair as parameter)

### 7. Save and run.

In My webMethods, verify the execution ...



**Integration > Managed File Transfer > Event Management > Event Log:**

### 8. Select your scheduled event.

### 9. Verify event execution details.

### 10. Verify file actions:

- Confirm the Find file action is successful.
- Confirm that the located file is uploaded/copied to the partner server.

# Monitor and Analyze File Transactions

## Monitor your file transactions

In My webMethods, filter on file transactions and browse here ...

### **Integration > Managed File Transfer:**



- File Transactions
- Event Log

## Analyze file transaction metrics

In webMethods MashZone, use the out-of-the-box dashboards ...

### **Integration > Managed File Transfer > Analytics: Mashzone**



- Transfer Analysis dashboard
- Transfer Rates dashboard
- Top 10 Metrics dashboard